EU TRADE EXPLORER

Market evolution: Vegetable plaiting materials (CN 14) — 2015–2025

Introduction

This report examines the evolution of European Union trade in Chapter 14 — "Vegetable plaiting materials; vegetable products not elsewhere specified or included" — with non-EU partners over the eleven-year window from 2015 to 2025. The analysis draws solely on the data provided by the EU Trade Dashboard, covering overall import and export flows, partner- and member-state-level breakdowns, market concentration, production volumes, price shocks, and vulnerability indicators. The product group combines two sub-headings: **1401** (bamboos, rattans, reeds, osier, raffia and similar plaiting materials) and **1404** (vegetable products not elsewhere specified).

Throughout the decade, the EU market for these goods has undergone a structural transformation: from near-total reliance on imports to a position of dramatically increased self-sufficiency, while simultaneously navigating significant price shocks and a reshaping of its international supplier base.

From near-total import dependence to domestic self-sufficiency

Domestic production surges from zero to over 13 million units in just a few years

EU production of CN 14 goods was negligible at the start of the period. According to Prodcom data, domestic output sat at **0 units** each year from 2015 to 2017. A decisive change occurred in 2018, when production jumped to **6 000 000** units, and has kept climbing, reaching **13 829 758** units by 2024. In value terms, EU-made output rose from **€7 million** in 2018 to **€19.1 million** in 2024 (see Production volumes). This home-grown capacity deeply rewired the EU's trade posture.

Import volumes contract while import prices soar by 81 %

Between 2015 and 2025, the total quantity of EU imports from outside the bloc fell from **1 202 182** to **967 219** units, a decline of **19.5 %**. Over the same interval, the value of those imports rose **45.8 %**, from **€216.3 million** to **€315.4 million**, propelled by a surge in the average unit price from **€179.9** to **€326.1** (+81.3 %). The bloc therefore absorbed significantly fewer physical goods at much higher cost, a pattern consistent with the substitution of domestic supply for bulk imports while remaining dependent on high-value external specialty products (Trade Overview).

Net import reliance plummets from 100 % to under 3 %

The rise in EU-based production directly collapsed the bloc's exposure to foreign sources. The net-import-reliance indicator stood at **100.0 %** in 2015, 2016 and 2017. It then fell sharply to **57.9 %** (2018), **39.3 %** (2020), **0.92 %** (2022), and reached just **2.44 %** by 2024. In effect, the EU has all but eliminated its structural import dependence for this product code within the space of a decade (Net Import Reliance).

Geopolitical tremors and the realignment of import suppliers

China and India cement their dominance amid shifting volumes

The import landscape has consolidated around two Asian giants. China remained the largest single supplier, its sales to the EU rising from **€60.2 million** in 2015 to **€96.0 million** in 2025 (+59.5 %). India's growth was even more spectacular, jumping **255.8 %** from **€22.8 million** to **€81.1 million** over the same period. Together they supplied well over half of EU imports by 2025, widening their lead as traditional suppliers faded (Top Partners).

Russia and Ukraine suffer severe price and supply disruptions

The two major Eastern European suppliers experienced diametrically opposite shocks around 2022. Imports from Ukraine, the largest partner in 2015 at **€61.9 million**, collapsed in volume and regained value only through a massive price spike. The unit price of Ukrainian goods soared **164 %** in 2022, while volume dropped to **192 274** units, down from a baseline of **471 427** units in 2020-21. Consequently, the value of Ukrainian imports ended at **€27.8 million** in 2025, a **55.1 %** fall compared with 2015.

Russia recorded an even sharper price shock in 2022, with import unit value leaping **93.3 %**, though its value share remained lower at **9.3 %**. The overall value of EU imports from Russia declined from **€15.0 million** to **€11.2 million** (–24.9 %). These twin shocks reflect the severe trade disruptions linked to the conflict in Ukraine (Price Shocks).

Extreme volatility from emerging and fringe suppliers

Some smaller suppliers exhibited enormous fluctuations in the quantities they shipped, indicating a highly irregular presence in the EU market. Kazakhstan's import coefficient of variation (CV) stood at **1.99**, Indonesia’s at **2.18**, and Belarus’ at **1.25**, all far above the stable figures for China (0.15) or Sri Lanka (0.15). In absolute terms, Kazakhstan went from negligible levels to **€9.2 million** in 2025, Indonesia to **€14.2 million**, underscoring that while the core of imports is concentrated, the periphery remains highly unpredictable (Volatility).

Export growth and the quiet diversification of EU sales

Export value rises on a comparatively modest volume increase

EU exports to non-EU countries climbed from **€22.1 million** in 2015 to **€39.3 million** in 2025, an increase of **78.1 %**. Export volume expanded **44.2 %** (from **43 561** to **62 800** units), indicating that, much like imports, the growth in value was also driven by rising unit prices (+24.0 %). The export unit price reached **€626.0** per unit in 2025, the highest in the series, reflecting a steady move toward higher-value shipments (Trade Overview).

Market concentration declines as exports reach a wider set of partners

The Herfindahl-Hirschman Index (HHI) for the value of exports fell from **1 910** in 2015 to **1 291** in 2025, a **32.4 %** drop, pointing to a substantial broadening of the customer base. While the United Kingdom remained the leading destination (up **35.4 %** to **€11.6 million**), other markets gained considerable ground. Exports to Norway rose **278.2 %** to **€2.7 million**, to Morocco **547.4 %** to **€1.1 million**, and to the United States **79.2 %** to **€4.6 million** — the latter having peaked at **€15.0 million** in 2020 before retreating. Meanwhile, declines in North Macedonia (–99.2 %) and Türkiye (–36.2 %) show a re-orientation away from some neighbouring markets (Concentration & Partners).

The Netherlands anchors exports while niche specialisation defines certain EU members

Among EU member states, the Netherlands was the dominant re-exporter throughout, handling **€15.4 million** of the **€39.3 million** total in 2025. France, Spain, and Germany followed, with Spain showing the fastest growth (+269.0 %). Measured by revealed symmetric comparative advantage (RSCA), the most specialised exporters in 2025 were Latvia (0.80), Greece (0.57) and Portugal (0.53), suggesting that while large trade hubs handle the bulk of flows, genuine export specialisation is concentrated in a handful of smaller economies (Specialisation).

Conclusion

Over the 2015-2025 period, the EU's trade in vegetable plaiting materials and related vegetable products has been redefined by the rapid build-up of domestic production. Imports, while still large in value, have steadily given way to home-grown supplies, pushing net import reliance from almost 100 % to negligible levels. The remaining import basket has become more expensive, more heavily concentrated on China and India, and was punctuated by powerful price shocks from conflict-affected suppliers like Russia and Ukraine. On the export side, the EU has managed to increase value and diversify its client base, even as overall volumes remain modest. The current picture is one of a much more resilient EU market — markedly less vulnerable to external supply disruptions, yet still exposed to price volatility for the high-value imported materials that continue to flow from Asia.

Generated on 2026-07-24 based on data from tradedashboard.eu

If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at this address.