Market evolution: Wheat (CN 1001) — 2015–2025

Introduction

EU trade in wheat and meslin (CN 1001) experienced fundamental shifts over the 2015–2025 period. The bloc remained a net exporter, but its surplus narrowed significantly as imports surged and export volumes contracted. This report examines the main dynamics behind the headline numbers, using annual data for extra-EU trade only. All figures are drawn directly from the trade dashboard and presented with links to the relevant interactive views.

Shrinking surplus: EU wheat trade balance erodes as exports lose momentum

Over the decade, the EU's net trade position in wheat deteriorated, even though it stayed comfortably positive.

The export value contracted by 8.1% while import value grew by 20.9%, shrinking the surplus from €4.74 bn to €3.87 bn

Export value fell from €6.42 bn in 2015 to €5.90 bn in 2025, a decline of 8.1%, while export volume dropped more sharply (–14.2%), from 31.8 million tonnes to 27.3 million tonnes (see General Overview). At the same time, imports grew markedly: value rose from €1.68 bn to €2.03 bn (+20.9%), and volume increased from 6.5 million tonnes to 7.7 million tonnes (+17.6%). The combination pushed the trade surplus down from €4.74 bn to €3.87 bn (–18.4%).

Export unit values rose moderately, but the volume decline dominates the long-term trend

Average export prices moved from €201.5/t to €215.9/t (+7.1%), while import prices were nearly flat, from €256.8/t to €264.2/t (+2.9%). Because the export volume fall was stronger than the price rise, value shrank. The data show a steep drop to a low of only 20.6 million tonnes exported in 2018, followed by a recovery and a subsequent slide after the 2022 spike.

Imports became more concentrated while export destinations diversified

The Hirschman-Herfindahl index (HHI) for imports rose from 2157.9 in 2015 to 2512.6 in 2025 (+16.4%), signalling a tighter set of suppliers (see Market concentration). In contrast, export market concentration fell from 747.3 to 633.6 (–15.2%), meaning the EU sold to a wider array of countries.

Eastern shift: EU wheat sourcing and export roles realign toward the East

The geography of EU wheat trade was reshaped by the growing weight of eastern EU members and by upheaval among external partners.

Eastern European exporters have taken the lead as France and Germany lost ground

Among member states, France – historically the dominant wheat exporter – saw its extra-EU sales plummet from €2.41 bn in 2015 to €1.28 bn in 2025 (–47.1%). Germany's exports fell even more sharply, from €1.53 bn to €0.60 bn (–60.5%). Meanwhile, Romania (+177.3%, from €542 mn to €1.50 bn), Bulgaria (+240.0%, from €252 mn to €858 mn), Lithuania (+64.0%) and Latvia (+59.7%) all recorded strong growth, reflecting the eastward shift of EU production and export capacity (see Top reporters). In 2025, Latvia (RSCA 0.8191) and Bulgaria (RSCA 0.8183) were the most specialised wheat exporters, while France remained highly specialised but with a smaller absolute role.

Import supply swung decisively toward Ukraine and Canada, away from Russia, the US and the UK

Ukraine became the top wheat supplier to the EU by 2025. Its value rose from €0.28 bn to €0.47 bn (+66.5%), but this understates the volatility: imports peaked at €1.54 bn in 2023. Canada also expanded its share significantly, from €0.63 bn to €0.85 bn (+36.3%). By contrast, imports from the United Kingdom collapsed from €0.20 bn to just €0.05 bn (–73.2%), Russia fell from €0.11 bn to €0.04 bn (–64.4%), and the United States dropped by 40.7%. Moldova (+344.2%) and Kazakhstan (+214.0%) emerged as important secondary sources, completing the eastward reorientation of supply (see Top partners).

Export demand shifted toward Morocco and Nigeria while traditional large buyers such as Algeria and Egypt weakened

Algeria remained the largest single destination but its imports from the EU dropped from €1.31 bn to €0.73 bn (–44.2%). Egypt, another historical buyer, fell from €0.69 bn to

€0.35 bn (–49.0%). In painful contrast, Morocco more than doubled its purchases to €0.93 bn (+107.8%), and Nigeria soared from a low base to €0.41 bn (+339.3%), becoming a top-5 partner. The United Kingdom (+65.2%) also became a bigger outlet, notably after Brexit. Meanwhile, China's presence remained highly erratic, with a huge spike in 2020 (€578 mn) and near-zero trade in other years.

Price turmoil and post-2022 adjustment: volatility reshaping supply chains

The 2022 price shock was the defining event of the decade, leaving lasting marks on trade flows, partner stability, and product composition.

A global price spike in 2022 triggered record export values and doubled import expenditure

In 2022, the export unit price peaked at €356.7/t and imports at €369.1/t, driven by the war-related disruption and market fears. That year, EU export value hit an all-time high of €11.21 bn, and imports surged to €2.57 bn. The extraordinary price environment is visible in the sharp upward shift across all major partners: for example, the price of wheat shipped to Algeria jumped 67.9% above the baseline, while the price for Moroccan and Nigerian exports also rose roughly 65-70%, as documented in the detected price-shock events (see Volatility & shocks).

Import volumes from Ukraine recorded extreme volatility, reflecting war-induced supply uncertainty

Ukraine's coefficient of variation of quantity supplied was 0.942 – the highest among major partners – as shipments collapsed to 0.29 million tonnes in 2021, then rocketed to 6.14 mn t in 2023 before halving again by 2025. Canada (CV 0.370) and Kazakhstan (0.519) were more stable, while Russia's trade became increasingly erratic and ceased by 2025. On the export side, China (CV 1.105) and Nigeria (0.696) displayed the most unpredictable demand patterns.

Post-shock adjustment favoured common wheat imports while durum wheat trade receded

The product segment breakdown shows that the import surge was concentrated in "wheat and meslin (excluding durum and seed)" – quantity rising from 3.86 mn t in 2015 to 5.49 mn t in 2025. Durum wheat imports, conversely, fell from 2.60 mn t to 2.18 mn t. On the export side, common wheat still dominates, but its volume dropped from 30.7 mn t to 26.6 mn t, while durum exports shrank from 1.07 mn t to 0.61 mn t, and durum export prices fell sharply (–30.4%) after 2022. The EU thus absorbed more milling wheat from the East while its own durum shipments to external markets contracted (see Product segment breakdown).

Conclusion

Between 2015 and 2025, EU wheat trade lost some of its traditional strengths: the net surplus narrowed, exports declined in volume, and the largest historical markets – Algeria and Egypt – bought considerably less. The geography of European wheat power shifted from France and Germany towards Romania, Bulgaria, and the Baltic states, while imports became more reliant on Ukraine and Canada. The 2022 price shock accelerated these trends, expanding intra-EU imbalances and reshaping supply chains. Although the EU remains a major net exporter, the data point to a more competitive, volatile, and eastern-oriented wheat market.

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