EU TRADE EXPLORER

# Market evolution: Agricultural harvesting machinery (CN 8433) — 2015–2025

## Introduction

This report examines the EU's external trade in agricultural harvesting machinery (CN 8433) with non-EU partners from 2015 to 2025. The product group covers combine harvesters, mowers, balers, sorting machines and their parts. Over the decade total trade value grew strongly, but volumes and prices followed divergent paths. Import sourcing underwent a profound shift, while export markets remained more diversified. The analysis highlights three central dynamics: price-led value increases, China's rise as the dominant supplier, and the evolving specialisation of EU member states.

## Robust Value Growth Driven by Rising Unit Prices Across Trade Flows

### Export value expands by 58.8 % despite a marginal volume decline

EU exports rose from €3.25 billion (2015) to €5.17 billion (2025), a 58.8 % increase, yet exported quantity fell slightly (−0.8 %). The implied unit price therefore surged by 60.1 %, from about €9 041 per unit to €14 472. After peaking at €6.63 billion in 2023, exports dropped in 2024-2025, but values remained well above the 2015 level. These trends are visible in the overall trade data (Trade overview).

| Indicator | 2015 | 2025 | Change |
|---|---|---|---|
| Exports (€ bn) | 3.25 | 5.17 | +58.8 % |
| Exports quantity (k tonnes) | 359.8 | 356.9 | −0.8 % |
| Unit export price (€) | 9 041 | 14 472 | +60.1 % |
| Imports (€ bn) | 1.67 | 3.25 | +94.5 % |
| Imports quantity (k tonnes) | 265.9 | 351.1 | +32.0 % |
| Unit import price (€) | 6 274 | 9 245 | +47.4 % |
| Trade balance (€ bn) | 1.58 | 1.92 | +21.1 % |

### Import value nearly doubles as both volumes and prices increase markedly

Imports grew even faster, from €1.67 billion to €3.25 billion (+94.5 %). Quantity expanded by 32 % and the unit price by 47.4 %. This combination reflects strong demand for both machinery and higher-cost products. Import value reached a new record of €3.25 billion in 2025, driven principally by a single supplier (see next section).

### The trade surplus widened until 2023 but narrowed sharply afterwards

The EU's trade balance remained positive throughout, reaching a high of €4.01 billion in 2023 before falling to €1.92 billion in 2025. The 2025 contraction reflects the simultaneous drop in exports from their 2023 peak and the import surge, compressing the surplus back towards its 2015 level.

## China Overtakes Traditional Suppliers and Drives Import Concentration

### China's import share soars, dwarfing other partners

China's shipments to the EU jumped from €0.47 billion (2015) to €2.03 billion (2025), a 330.6 % increase. It became by far the largest extra-EU source, while the United States saw a 23.1 % decline to €0.47 billion and the United Kingdom remained essentially flat. Other emerging suppliers such as Türkiye (+107.7 %) and India (+166.8 %) also gained ground. The partner ranking is detailed here (Top partners by value).

| Import partner | 2015 (€ bn) | 2025 (€ bn) | Change |
|---|---|---|---|
| China | 0.47 | 2.03 | +330.6 % |
| United States | 0.61 | 0.47 | −23.1 % |
| United Kingdom | 0.36 | 0.37 | +2.3 % |
| Türkiye | 0.03 | 0.06 | +107.7 % |
| India | 0.01 | 0.03 | +166.8 % |

### Export markets remain relatively broad with the US and UK as leading destinations

On the export side, the United States remained the top market, growing 41.9 % to €1.17 billion, followed by the United Kingdom (+29.6 %). Ukraine (+148.6 %) and the Russian Federation (+89.9 %) showed strong growth, though Russian exports have declined from their 2023 peak. The top seven destinations are listed in the same dashboard.

### Import concentration surged while export diversification improved

The Herfindahl-Hirschman Index (HHI) for import value rose from 2 625 to 4 257 (+62.2 %), signalling a sharp increase in supply concentration, largely driven by China's weight.

Export HHI, by contrast, fell from 1 045 to 887 (−15.1 %), indicating a more diversified set of customer markets. The detailed HHI series is available under (Concentration).

## Product Segments and National Specialisation Underpin Trade Dynamics

### Lawn mowers dominate import growth while combine harvesters lead exports

Disaggregating CN 8433 by sub-heading reveals contrasting patterns. Imports are increasingly dominated by powered mowers (CN 843311), whose value rose from €0.95 billion to €2.22 billion. Export strength rests on combine harvester-threshers (CN 843351; €0.49 bn to €0.98 bn) and parts (CN 843390; €0.85 bn to €1.27 bn). Unit prices rose across almost all categories, especially for exported parts (from €10 773 to €17 888 per unit). The full segment breakdown can be found under (Product segments).

| Segment | Flow | 2015 (€ bn) | 2025 (€ bn) | Change |
|---|---|---|---|---|
| 843311 (Lawn mowers) | Imports | 0.95 | 2.22 | +134 % |
| 843351 (Combine harvesters) | Exports | 0.49 | 0.98 | +99 % |
| 843390 (Parts) | Exports | 0.85 | 1.27 | +49 % |
| 843390 (Parts) | Imports | 0.36 | 0.49 | +35 % |

### Germany, Belgium and the Netherlands consolidate their positions as top EU traders

Among EU member states, Germany remained the largest exporter (€1.17 bn to €1.78 bn, +52.6 %) and top importer. Belgium's and the Netherlands' exports more than doubled (+115.8 % and +109.6 % respectively), while Hungary's exports surged by 171.2 %. France, by contrast, saw its exports fall by 10.9 %. On the import side, the Netherlands and Belgium together accounted for over a third of EU imports in 2025, with rapid growth of 247 % and 124 % respectively (Top reporters).

### Revealed comparative advantage highlights Austria, Bulgaria and Germany as the most specialised member states

In 2025, Austria exhibited the highest revealed symmetric comparative advantage (RSCA = 0.2884) in this product group, followed by Bulgaria (0.2595) and Germany (0.1622). These countries' exports of machinery hold a disproportionate weight in their total export baskets. At the opposite end, Malta, Portugal, Greece and Spain show the weakest specialisation (RSCA below –0.64). The full specialisation map is available under (Specialisation).

## Conclusion

EU trade in agricultural harvesting machinery grew substantially in value over 2015-2025, but the expansion was almost entirely price-driven. Imports surged faster than exports, propelled by a wave of supplies from China, which sharply increased import concentration. Exports remained more broadly anchored to traditional partners such as the US and UK, although geopolitical shocks – notably the UK price shock around 2020 and the post-2022 retrenchment in Russia – left clear marks on trade flows. The product mix is shifting toward higher-value lawn mowers on the import side and towards combine harvesters and high-value parts on the export side. The EU's overall trade surplus, while still positive, has eroded from its 2023 peak, underlining the need to monitor import dependence in key machinery segments.

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