Market evolution: Audio equipment (CN 8518) — 2015–2025

Introduction

Between 2015 and 2025, the European Union's extra-EU trade in audio equipment (CN 8518) underwent a profound value expansion, driven almost entirely by surging unit prices rather than by higher volumes. The product category – which covers microphones, loudspeakers, headphones, amplifiers and parts – saw export values climb from €2.0 billion to €3.7 billion (+86.1 %) and import values jump from €3.4 billion to €7.3 billion (+118.5 %), widening the trade deficit from –€1.4 billion to –€3.7 billion Overview. At the same time, traded quantities barely moved: export tonnage declined by 0.8 % and import tonnage by 3.4 %, while the implicit unit value soared by 87.6 % for exports and 126.1 % for imports. These headline numbers reflect a broad shift towards premium personal-audio devices, the emergence of new supply hubs, and a profound re-ordering of the EU's commercial power centres. The following sections dissect the three main dynamics that shaped the market.

A consumer-driven boom in high-end personal audio

Headphones and earphones now dominate both the import and export basket

The single biggest engine of value growth has been the sub-category *Headphones and earphones, whether or not combined with a microphone* (CN 851830). EU imports of these products quadrupled from €964 million in 2015 to €3.93 billion in 2025, while exports more than doubled from €493 million to €1.19 billion Product segment breakdown. At the same time the unit value of imported headphones jumped from €39 350 per tonne to €103 207 per tonne, and that of exported headphones from €99 080 to €159 555 per tonne. This indicates a rapid upgrading of the product mix – driven by true-wireless earbuds, active-noise-cancelling headsets and high-fidelity in-ear monitors – and shows that consumers and businesses are willing to pay significantly higher prices for advanced audio technology.

Other sub-segments grew in value but not in volume

Beyond headphones, all major sub-categories experienced value increases while physical quantities either stagnated or shrank. The table below summarises the contrasts.

Sub-category (CN code)	Import quantity change (2015 → 2025)	Import value change	Export value change
Multiple loudspeakers, mounted (851822)	–26.7 % (100 009 t → 73 314 t)	+41.0 % (€706 M → €996 M)	+77.6 % (€484 M → €859 M)
Single loudspeakers, mounted (851821)	–27.5 % (51 364 t → 37 256 t)	+46.5 % (€353 M → €518 M)	+98.2 % (€130 M → €258 M)
Loudspeakers without enclosure (851829)	–2.3 % (44 756 t → 43 741 t)	+19.4 % (€433 M → €517 M)	+24.2 % (€206 M → €256 M)
Audio-frequency electric amplifiers (851840)	+101 % (12 732 t → 25 610 t)	+27.2 % (€382 M → €485 M)	+70.3 % (€248 M → €422 M)
Microphones and stands (851810)	+72.4 % (4 734 t → 8 162 t)	+99.3 % (€228 M → €455 M)	not separately reported*

*Microphone export data is not shown as a separate primary category in the export breakdown; it is included under “Electric sound amplifier sets” (851850).

The figures confirm that inflation in average unit price, rather than volume expansion, explains most of the value increase. The one exception is amplifiers, where import quantities more than doubled, suggesting a genuine surge in demand, possibly linked to home-studio and streaming setups.

Geopolitical realignments and the diversification of trade partners

China solidifies its role as the indispensable supplier, while Viet Nam emerges as a manufacturing giant

The EU’s import structure remains highly concentrated, with the Herfindahl-Hirschman Index (HHI) for import value hovering around 4 300, slightly higher than in 2015 Import concentration. China alone supplied €4.6 billion in 2025, up 112.3 % from €2.2 billion in 2015 Top import partners. Even more striking is the rise of Viet Nam, whose shipments surged from €84 million to €1.45 billion (+1 622 %), reflecting the relocation of global electronics assembly lines. Together, these two countries accounted for the bulk of the import value increase. Other Asian suppliers also posted solid gains: Malaysia (+89 %), Mexico (+95 %) and Thailand (+58 %).

The United Kingdom’s departure from the single market redrew the import map

A clear structural break is visible in imports from the United Kingdom. In 2019 the UK was still the EU’s third-largest external source, with €438 million of audio equipment entering the bloc. After the end of the transition period, imports collapsed to €144 million in 2021 and have since stabilised around that lower level, ending 2025 at €144 million (–47.7 % compared with 2015). At the same time, the UK remained the EU’s top export destination, absorbing €714 million in 2025 (+17.3 %), confirming that the post-Brexit trade relationship retains a healthy export flow but has drastically reduced the UK’s role as a supplier.

Export destinations grew more diversified, with Switzerland and the United States leading the expansion

The HHI for EU exports of audio equipment fell from 1 340 in 2015 to 890 in 2025, signalling a significantly more balanced portfolio Export concentration. Key destination shifts include:

Destination	2015 value (€ M)	2025 value (€ M)	Change
United States	282	554	+96.1 %
China	119	327	+174.7 %
Switzerland	104	336	+222.5 %
Türkiye	52	131	+153.8 %
Norway	123	236	+91.7 %
Russian Federation	60	0.01	–100.0 %

The near-total disappearance of the Russian market after 2022 – from €114 million in 2021 to almost zero – reflects the effect of EU sanctions. The rapid rise of Switzerland and the continued strength of the US market underline the EU’s ability to redirect its exports towards higher-income economies.

Structural shifts in EU production and the growing import reliance

Manufacturing volume shrank, but value creation increased

EU production data reveals a deliberate repositioning. Production volumes fell from 506 million units in 2009 to 137 million units in 2024 (–72.9 %), yet the production value rose from €2 426 million to €3 224 million (+32.9 %) Production volumes. This indicates a move away from low-value, high-volume assembly towards more sophisticated, higher-priced hardware – consistent with the broader premiumisation visible in trade data.

The Netherlands embodies the re-export hub model

Among EU Member States, the Netherlands has emerged as the undisputed logistics centre for audio equipment. Its imports from outside the EU soared from €713 million in 2015 to €2 420 million in 2025 (+239.5 %), while its exports to non-EU destinations rose from €216 million to €614 million (+184.4 %) Top EU reporters. At the same time, the Netherlands posts one of the highest specialisation scores (RSCA 0.37), demonstrating that its trade is disproportionately focused on this sector. Germany remains the largest exporter (€1.23 billion in 2025, +102.9 %) but its export growth was less explosive. By contrast, Belgium's exports dropped by nearly half (€175 million to €88 million), suggesting a loss of competitive advantage in this sector.

Net import reliance has deepened, and export propensity now exceeds 100 %

One of the most concerning trends is the steady increase in the EU's net import reliance, which climbed from 34.6 % in 2015 to 50.0 % in 2024, having peaked at 53.0 % in 2021 Net import reliance. In parallel, export propensity (extra-EU exports as a share of EU production value) rose from 33 % to 104 % in 2024, an increase of 214.7 % Export propensity. An export propensity above 100 % implies that a sizeable share of EU exports are re-exports of imported goods – a pattern consistent with the hub role played by the Netherlands and, to a lesser extent, Czechia and Hungary, both of which show high specialisation indices (RSCA 0.38 and 0.30) Specialisation.

Conclusion

Over the eleven-year observation window, the EU's external trade in audio equipment has been transformed by an upmarket shift in consumer demand, the rapid expansion of Asian supply chains, and the reconfiguration of Europe's own production base. Headphones and earphones have become the pivotal product segment, driving record import values and pushing the trade deficit to over €3.7 billion. While the EU has successfully broadened its export markets – compensating for the loss of Russia with gains in Switzerland, the United States and elsewhere – its import supply remains uncomfortably concentrated on China and, increasingly, Viet Nam. Domestic manufacturing continues to create higher value from fewer units, but the rising net import reliance and the growing importance of re-export activities signal a structural dependency that will need careful monitoring in the years ahead.

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