EU TRADE EXPLORER

Market evolution: Automotive lighting and wipers (CN 8512) — 2015–2025

Introduction

The EU's external trade in electrical lighting and signalling equipment for vehicles, windscreen wipers and demisters (CN 8512) recorded a decade of profound transformation from 2015 to 2025. Aggregate figures mask a reality in which soaring unit prices, a major reorientation of partner countries and a deepening of intra-EU specialisation have completely reshaped the sector's trade profile. This report dissects the main dynamics using official EU trade statistics, highlighting three dominant trends: the decoupling of value growth from physical volumes, the geopolitical pivoting of supply and demand, and the tightening integration of the EU's own production apparatus into global value chains.

1. A sector driven by value, not volume: soaring unit prices lift trade aggregates

Aggregate trade values grew briskly over the period, yet the primary driver was not more parts moving across borders but a steep rise in the average price per unit exported or imported.

Total exports expanded by one-quarter, entirely because of higher unit values

EU exports of CN 8512 rose from €3 284 million in 2015 to €4 152 million in 2025, a 26.4 % increase, while the shipped quantity actually fell by 9.7 % (from 102 397 tonnes to 92 436 tonnes). Consequently, the average export price per tonne jumped by 40.1 %, from €32 070 to €44 916 Trade overview.

Imports more than doubled, pulled by both larger volumes and price appreciation

On the import side, the value surged by 109.9 %, from €1 676 million to €3 517 million. The import quantity grew by 49.1 % (from 96 951 to 144 547 tonnes) and the average import price rose 40.8 % (€17 282 to €24 332 per tonne). The combination of rising volumes and rising prices meant imports outpaced exports, shrinking the EU's trade surplus from €1 608 million to €635 million (–60.5 %).

Indicator (EU external trade)	2015	2025	Change
Exports (€ million)	3 284	4 152	+26.4 %
Export quantity (tonnes)	102 397	92 436	–9.7 %
Export price (€/tonne)	32 070	44 916	+40.1 %
Imports (€ million)	1 676	3 517	+109.9 %
Import quantity (tonnes)	96 951	144 547	+49.1 %
Import price (€/tonne)	17 282	24 332	+40.8 %
Trade balance (€ million)	1 608	635	–60.5 %

Interpretation: The sector illustrates a classic "value-over-volume" dynamic—unit prices rose strongly on both sides, reflecting greater product sophistication, cost inflation and likely a mix shift towards more expensive LED and electronic modules. Meanwhile, the shrinking trade surplus signals that EU demand for imported components grew faster than foreign demand for EU-made equipment.

2. Geopolitical pivots: supply chains re-orientate while export markets realign

The pattern of trading partners underwent a deep re-shuffle, with new near-shore and Asian suppliers gaining import share, traditional export markets diverging, and sanctions abruptly eliminating one formerly important destination.

Import sourcing diversifies as China, Morocco and Serbia climb steeply

China remained the dominant supplier, its deliveries rising from €416 million to €926 million (+122.6 %). Two relative newcomers posted spectacular growth: Morocco (from €7.6 million to €297 million, +3 828 %) and Serbia (from €46.7 million to €312 million, +566.5 %). The United Kingdom (€189 million, +49.9 %) and Taiwan (€310 million, +79.5 %) also expanded solidly, while Korea was practically flat (+0.4 %) Top partners – imports.

Import partner	2015 (€ million)	2025 (€ million)	Change
China	416	926	+122.6 %
Korea	384	386	+0.4 %
UK	126	190	+49.9 %
Taiwan	173	310	+79.5 %
Serbia	47	312	+566.5 %
Türkiye	126	265	+110.3 %
Morocco	8	297	+3 828 %

This shift is accompanied by a moderate fall in import concentration, with the Herfindahl-Hirschman Index moving from 1 425 to 1 197 (–16.0 %) Concentration HHI.

Export destinations: China overtakes the UK, Russia vanishes, the US shows price spikes

On the export side, China became the top market (€1 166 million, +64.5 %), displacing the United Kingdom (€777 million, –12.6 %). The United States held broadly steady at €528 million (+4.1 %), while Türkiye (€242 million, +82.6 %) and Serbia (€80 million, +125.5 %) grew notably. The Russian Federation, once a €119 million market, collapsed to just €0.3 million in 2025 (–99.7 %) following sanctions imposed in 2022. The dashboard identifies this as a structural supply shock, with export quantities falling from thousands of tonnes to near-zero Top partners – exports, Supply shocks.

Export partner	2015 (€ million)	2025 (€ million)	Change
United Kingdom	889	777	–12.6 %
China	709	1 166	+64.5 %
United States	507	528	+4.1 %
Türkiye	132	242	+82.6 %
Serbia	36	80	+125.5 %
Russian Federation	119	0.3	–99.7 %
Brazil	68	124	+82.1 %

Interpretation: The import mix reflects a deliberate diversification strategy—near-shoring to Morocco and Serbia has intensified alongside continued reliance on China. On the export side, the sector compensated for the UK’s post-Brexit decline and the Russia shock by redirecting sales to China, Türkiye and other emerging markets. The US market, though not expanding in volume, experienced a sharp price spike in 2022 (detected as a +19.1 % price shock) that inflated its value without a sustained quantity increase Price shocks.

3. Deeper global integration and a shifting intra-EU division of labour

The EU’s own automotive lighting sector became markedly more intertwined with the rest of the world, while the roles of member states in trade and production evolved.

EU production swells in value terms and export propensity rockets

EU production value of CN 8512-related goods (including parts, wipers, signalling) climbed from €5 340 million in 2003 to €14 610 million in 2024 (+173.6 %), far outpacing the +9.8 % increase in production volume over the same span. This highlights the same price-driven transformation seen in trade. As a result, the export propensity (exports/production) soared from 9.4 % to 30.9 % (+227.5 %), and trade intensity (exports+imports relative to production) jumped from 13.2 % to 43.4 % Production volumes and values, Export propensity. Net import reliance stayed negative (around –9.5 % in 2024–25, versus –5.3 % in 2015), confirming the EU remains a net exporter, though the absolute surplus has narrowed.

Germany consolidates its export dominance while Czechia and France lose ground

Among member states, Germany widened its lead as top exporter (€2 365 million, +42.3 %) and also led imports (€911 million, +115.9 %). However, the export shares of Czechia (–44.8 %) and France (–25.1 %) contracted sharply, while Belgium (+72.6 %) and Spain (+37.6 %) grew. This redistribution is reflected in the specialisation indices: in 2025 the most specialised reporters were Slovakia (RCA 5.38), Slovenia (3.48) and Czechia (3.47), indicating that central European countries remain deeply specialised in this product group, even if their export values have declined in some cases Top reporters, Specialisation.

Top EU exporters	2015 (€ million)	2025 (€ million)	Change
Germany	1 661	2 365	+42.3 %
Czechia	367	203	–44.8 %
France	308	231	–25.1 %
Spain	147	202	+37.6 %
Italy	170	151	–11.3 %
Belgium	99	171	+72.6 %
Poland	99	111	+12.0 %

Concentration and product composition stay stable, but lighting dominates value growth

Despite the partner shifts, the overall concentration of trade flows changed only moderately. The export HHI moved from 1 516 to 1 405 (–7.3 %) and import HHI from 1 425 to 1 197. Within the product mix, the segment *Electrical lighting or visual signalling equipment for motor vehicles* (851220) represented 73 % of exports and 64 % of imports in 2025, with average export prices reaching €62 251/tonne—up from €39 993 in 2015. Parts (851290) remained the second pillar, while windscreen wipers (851240) and audible signalling (851230) followed at a distance Product segments.

Conclusion

Over 2015–2025, EU trade in automotive lighting and wipers was fundamentally reshaped by three interlocking forces: a powerful shift towards higher-value goods that lifted prices far beyond volume growth, a deliberate geographic rebalancing of suppliers and customers that reduced concentration while absorbing geopolitical shocks, and a deepening integration of the EU's own production into global value chains. Germany consolidated its position as the bloc's export powerhouse, but central European specialists remained vital, and near-shore partners like Morocco and Serbia emerged as major import sources. The sector's dependence on China for imports and, increasingly, for export revenues calls for continued monitoring, especially as the narrowing trade surplus suggests that import reliance—though still low in relative terms—is growing in absolute scale.

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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.