Market evolution: Base metal tools and cutlery (CN 82) — 2015–2025

Introduction

Customs code 82 covers a broad range of base metal products including hand tools, cutlery, interchangeable machine tools, saw blades, razors, and tableware. This report examines the evolution of the European Union’s extra-EU trade in these goods from 2015 to 2025. Over this period, the EU’s position has shifted from a comfortable trade surplus to a deficit, driven by divergent volume dynamics, surging imports from China, and the dramatic redrawing of export markets following geopolitical shocks. The analysis is structured around three key findings: the erosion of the net export position, the realignment of partner dependencies, and the growing structural vulnerability of the sector.

From surplus to deficit: The EU loses its edge in base metal tools

Export volumes collapse while import quantities soar

The physical trade flows tell a striking story. EU export quantities fell by 25.7 %, from around 340 thousand tonnes in 2015 to 252 thousand tonnes in 2025. In contrast, import quantities surged by 38.5 %, climbing from 619 thousand tonnes to 857 thousand tonnes over the same period (see General Overview). This widening gap in physical tonnage underlines a fundamental shift: the EU is procuring an ever-larger share of its base metal tools from outside the bloc while shipping fewer volumes overseas.

Export unit values compensate only partially

Higher export prices helped cushion the value impact of shrinking volumes. The average export unit value rose from €24 049 per tonne to €35 934 per tonne, an increase of 49.4 %. Meanwhile, import unit prices edged down by 3.0 %, from €11 343 to €11 005 per tonne. The widening price gap reflects the EU’s specialisation in high-end tooling and precision instruments, whereas imports are dominated by lower-cost, mass-produced items. However, the price premium was insufficient to prevent a deterioration in the trade balance.

Indicator	2015	2025	Change
Export value (€ bn)	8.18	9.07	+11.0 %
Export quantity (k t)	340.0	252.5	–25.7 %
Export unit price (€/t)	24 049	35 934	+49.4 %
Import value (€ bn)	7.02	9.43	+34.4 %
Import quantity (k t)	618.6	856.6	+38.5 %
Import unit price (€/t)	11 343	11 005	–3.0 %
Trade balance (€ bn)	+1.16	–0.35	–130.6 %

The trade balance turns negative for the first time

The EU consistently ran a surplus in CN 82 until 2024, with a peak of about €1.2 bn in 2015. By 2025, the balance had flipped to a deficit of €355 million. The swing is attributable to the combination of falling export tonnage and a relentless rise in import volumes, which together overwhelmed the positive contribution of higher export prices. The balance hit its lowest point in 2022 (-€661 million) during a price spike for imports, then recovered slightly, but the underlying trend is clearly towards a structural deficit.

Shifting partner architecture: China’s dominance and geopolitical realignment

Chinese imports cement their lead while Asian rivals grow

China has long been the EU’s main source of base metal tools, and its share has grown dramatically. EU imports from China jumped 82.4 %, from €2.54 bn in 2015 to €4.64 bn in 2025 (Top partners). India and Viet Nam also recorded strong gains (+63.0 % and +64.3 % respectively), while imports from Taiwan grew modestly. As a result, the Herfindahl-Hirschman Index (HHI) for extra-EU imports rose by 57.5 %, signalling a more concentrated and therefore riskier supplier base.

Top import partners	2015 (€ bn)	2025 (€ bn)	Change
China	2.54	4.64	+82.4 %
Taiwan	0.55	0.57	+2.4 %
United Kingdom	0.49	0.30	–38.4 %
India	0.16	0.27	+63.0 %
Korea, Republic of	0.35	0.30	–12.0 %
Viet Nam	0.12	0.19	+64.3 %
United States	0.70	0.70	+0.7 %

Collapse of the Russian export market and post-Brexit UK decline

On the exports side, the geopolitical landscape changed radically. EU exports to Russia plummeted by 82.2 %, from €498 million in 2015 to just €89 million in 2025, a direct consequence of sanctions and trade restrictions after 2022. Shipments to the United Kingdom, while still the second-largest destination, fell by 16.7 %, reflecting post-Brexit trade friction and perhaps domestic substitution. Exports to China also contracted by 11.8 %, partly reflecting the EU's move towards higher-priced, lower-volume specialized goods that are less import-dependent for China.

The United States becomes the anchor of EU exports

The US market absorbed the shock. Exports to the United States grew 55.5 %, from €1.49 bn to €2.32 bn, making it by far the largest single destination. Growth was also robust to Switzerland (+27.1 %), Türkiye (+32.1 %), and Norway (+13.4 %). These gains helped stabilise the overall export value. The export partner HHI increased by 27.6 %, indicating a slightly higher but still moderate concentration.

Top export partners	2015 (€ bn)	2025 (€ bn)	Change
United States	1.49	2.32	+55.5 %
United Kingdom	1.04	0.87	–16.7 %
Switzerland	0.58	0.73	+27.1 %
China	0.78	0.69	–11.8 %
Russian Federation	0.50	0.09	–82.2 %
Türkiye	0.32	0.42	+32.1 %
Norway	0.22	0.25	+13.4 %

Growing vulnerability: Rising import reliance and structural transformation

Net import reliance spikes and remains elevated

The EU's net import reliance — the share of apparent consumption met by extra-EU net imports — rose from 23.7 % in 2015 to 29.7 % in 2024, an increase of 25.5 % (Net import reliance). The indicator peaked at 56.8 % in 2022 during the supply-chain disruptions and price spikes that followed the pandemic, before retreating. Nonetheless, the long-term trajectory points towards a deeper dependence on non-EU suppliers, particularly China, for essential tools and parts.

Import supply becomes more concentrated, adding risk

Market concentration on the import side, measured by the value HHI, advanced from 1 734 in 2015 to 2 732 in 2025 (+57.5 %) (Concentration). The top suppliers — China, Taiwan, and Switzerland — account for a growing proportion of imports, while many smaller sources lost share. This heightened concentration, coupled with increasing volatility in import quantities (China's coefficient of variation was 0.18, making it the most volatile large supplier), exposes the EU to supply-side shocks. The price shock from China in 2022, when average import prices jumped 23.7 % above the baseline, underlines the vulnerability (Price shocks).

Production shifts towards higher value despite falling volumes

EU production of CN 82 goods shows a telling contrast. While the quantity produced (in units) fell by 42.3 % between 2003 and 2024, the production value rose by 59.6 %, from €60.7 mn to €96.9 mn (Production volumes). The steep rise in the implicit production price — from €3.5 per unit to €9.7 per unit — reflects a mix shift towards more sophisticated, higher-value articles such as interchangeable machine tools and specialised cutting blades. This aligns with the export unit value trend and highlights the EU's competitive advantage in technology-intensive segments. However, the shrinking physical production base suggests that a large share of lower-value assembly and manufacturing has moved outside the EU.

Conclusion

Over the 2015-2025 window, the EU's trade in base metal tools and cutlery has undergone a profound transformation. While the bloc has successfully moved up the value chain, reflected in sharply higher export prices and rising production values, it has at the same time become more dependent on imported volume. China's role as a supplier has become even more dominant, while geopolitical ruptures have permanently altered export patterns, with Russia all but disappearing and the United States emerging as the indispensable partner. The result is a structural trade deficit, elevated import concentration, and a net import reliance that remains well above its 2015 level. Future resilience will depend on the EU's ability to manage supplier risks and sustain innovation in its high-value segments.

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

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