

Market evolution: Data processing machines (CN 8471) — 2015–2025

Introduction

This report examines the EU's external trade in automatic data-processing machines and units (CN 8471) between 2015 and 2025. The product group covers portable computers, servers, storage units, input/output devices, and other data-processing hardware. Over the decade, the market underwent a striking transformation: trade values climbed sharply while physical tonnes dropped, the geographic pattern of suppliers and customers changed substantially, and domestic production shrank, pushing the EU's import dependence to historically high levels.

The Great Decoupling: Trade Values Surge as Physical Quantities Shrink

Export and import values grew by 88 % and 78 % respectively, while tonnage fell by a fifth to a third

Total EU exports rose from **€17.6 billion** to **€32.9 billion** (+87.5 %), and imports from **€43.5 billion** to **€77.4 billion** (+77.8 %). At the same time, the weight of goods moved in the opposite direction: export volumes dropped from **149 thousand tonnes** to **118 thousand tonnes** (–20.6 %) and import volumes from **521 thousand tonnes** to **349 thousand tonnes** (–33.1 %). Overall trade values.

Indicator	2015	2025	Change
Exports (€ bn)	17.55	32.91	+87.5 %
Imports (€ bn)	43.51	77.36	+77.8 %
Export volume (k tonnes)	149.2	118.5	–20.6 %
Import volume (k tonnes)	520.8	348.6	–33.1 %
Trade balance (€ bn)	–25.95	–44.45	–71.3 %

Unit prices more than doubled, reflecting a transition to high-end servers, processors, and storage systems

The combination of rising values and falling volumes sent unit prices soaring. The average export price jumped from **€117.7 per kg** to **€277.8 per kg** (+136.1 %) and the average import price from **€83.5 per kg** to **€221.9 per kg** (+165.7 %). Overall trade values. This price

explosion mirrors the composition shift within CN 8471: imports of processing units (847150) grew from **€5.3 billion** to **€19.9 billion** (+277 %) and “other units” (847180) from **€2.7 billion** to **€10.5 billion** (+284 %), while portable computers (847130) rose only modestly in value but lost volume Product segment breakdown. Thus, the EU’s data-processing trade moved decisively from bulky, lower-value devices towards high-value semiconductors, servers, and specialised computing components.

A New Geography of Supply: Diversification, Deglobalisation, and Geopolitical Shocks

Imports diversified away from China’s dominance as Taiwan, Vietnam, Thailand, and the US posted triple-digit growth

China remained the largest supplier, with imports rising from **€28.3 billion** to **€39.7 billion** (+40.2 %). However, its share of import value fell sharply, and the Herfindahl-Hirschman Index for imports dropped from **4 366** to **2 996** (–31.4 %) Concentration HHI. Asian alternatives surged: imports from Taiwan multiplied by **nine** (from €0.9 bn to €8.5 bn, +831 %), from Thailand grew by **181 %** (to €5.5 bn), and from Viet Nam by **260 %** (to €4.4 bn). The United States also more than doubled its deliveries to **€7.1 billion** (+152 %). Meanwhile, the United Kingdom’s role shrank from **€2.1 billion** to **€1.2 billion** (–44.5 %) Top import partners.

Import partner	2015 (€ bn)	2025 (€ bn)	Change
China	28.33	39.72	+40.2 %
Taiwan	0.92	8.54	+831.1 %
Thailand	1.95	5.46	+180.6 %
Viet Nam	1.23	4.42	+260.3 %
United States	2.80	7.07	+152.1 %
United Kingdom	2.08	1.16	–44.5 %

Brexit and sanctions redrew export maps: the UK’s role diminished and Russia virtually vanished as a destination

EU exports to the United Kingdom increased modestly from **€5.4 billion** to **€7.1 billion** (+32.9 %), but its share fell. A far more dramatic exit occurred with Russia: exports collapsed from **€0.82 billion** in 2015 to just **€1.9 million** in 2025 (–99.8 %), a supply shock detected by the volatility module Supply shock – Russia. This reflects the impact of sanctions following the 2022 invasion.

Export growth accelerated to the United States and the Middle East

Compensating for these losses, shipments to the United States soared from **€1.6 billion** to **€5.8 billion** (+258.6 %), making the US the second-largest export market. Other dynamic destinations included Norway (to €2.0 bn, +123 %) and the United Arab Emirates (to €1.5 bn, +128 %) Top export partners. The export concentration HHI also declined, from **1 249** to **983** (–21.3 %), confirming a broader diversification of outlets Concentration HHI.

Export partner	2015 (€ bn)	2025 (€ bn)	Change
United Kingdom	5.35	7.11	+32.9 %
United States	1.61	5.78	+258.6 %
Switzerland	1.79	2.39	+33.4 %
Norway	0.89	2.00	+123.4 %
UAE	0.66	1.50	+128.0 %
Russia	0.82	0.002	–99.8 %

Strategic Vulnerabilities: Fading Domestic Production and Rising Import Dependence

EU domestic output of data-processing machines contracted by over a third in volume and a quarter in value

EU production of CN 8471 fell from **66.0 million units** in 2015 to **43.4 million units** in 2024 (–34.3 %). In value terms, it declined from **€13.1 billion** to **€9.5 billion** (–27.3 %) Production volumes. This structural retreat contrasts with the trade boom and underlines growing offshoring of manufacturing to Asia.

Production indicator	2015	2024	Change
Volume (mn units)	66.0	43.4	–34.3 %
Value (€ bn)	13.1	9.5	–27.3 %

Net import reliance rose to its highest level in two decades, underlining a critical dependency

The EU's net import reliance for data-processing machines climbed from **65.7 %** in 2015 to **78.4 %** in 2024, reaching an all-time peak of **86.1 %** in 2021 Net import reliance. Simultaneously, export propensity soared from **113.7 %** to **222.8 %** Export propensity, signalling that the EU is not only highly import-dependent but also a major re-export hub—mainly through the Netherlands.

Intra-EU specialisation concentrates manufacturing in a handful of Central and Eastern European states

The revealed symmetric comparative advantage (RSCA) for 2025 shows five highly specialised exporting member states: **Netherlands** (RSCA 0.46), **Czechia** (0.51), **Ireland** (0.32), **Hungary** (0.17), and **Poland** (0.10) Specialisation map. The Netherlands alone accounts for **39 %** of the EU's exports of these goods, largely driven by its logistics and distribution role. Conversely, most other member states show negative RSCA values, indicating limited specialisation in data-processing hardware.

Conclusion

Between 2015 and 2025, the EU's external trade in CN8471 evolved from a volume-driven, China-centred import pattern to a high-value, geopolitically diversified but also structurally more import-dependent model. The surge in unit prices, propelled by a shift toward advanced processing and storage equipment, masked a sharp decline in physical shipments. The supplier base broadened dramatically towards Taiwan, Vietnam, Thailand, and the United States, while the UK faded as an import source and Russia was cut off as an export destination. At home, production shrank and net import reliance rose to critical levels, leaving the EU increasingly reliant on foreign supply chains for the hardware that underpins its digital economy.

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