EU TRADE EXPLORER

# Market evolution: Flat panel displays (CN 8524) — 2015–2025

## Introduction

The category CN 8524 covers flat panel display modules, whether or not incorporating touch-sensitive screens. It bundles six sub-headings that distinguish modules by display technology (liquid crystal, OLED, or other) and by the presence or absence of drivers/control circuits. This report examines the EU's extra-EU trade from 2022 to 2025, the period for which high-quality, outlier-cleaned annual data are available. It highlights the surge in exports, the shift in import sources, the growing role of high-value OLED modules, and the EU's persistent net-import reliance.

## Export dynamic accelerates while imports plateau

EU exports of flat panel displays more than tripled in value over the observation window, while imports remained relatively stable, leading to a small improvement in the enormous trade deficit.

### Export value jumps from €479 million to €1.7 billion

Total extra-EU exports rose by 256.5 %, from €479 million in 2022 to €1.71 billion in 2025. Quantities grew by 71.2 %, but the much stronger value increase was driven by a 108.3 % rise in average export price, indicating a shift towards more sophisticated modules.

| Year | Exports (value, € billion) | Exports (quantity, tonnes) | Average price (€/kg) |
|---|---|---|---|
| 2022 | 0.48 | 5 000 | 95 766 |
| 2023 | 1.06 | 6 742 | – |
| 2024 | 1.37 | 8 137 | – |
| 2025 | 1.71 | 8 558 | 199 492 |

### Imports level off near €7.2 billion as higher supply diversity tempers growth

Imports rose by only 20.2 %, from €6.03 billion to €7.24 billion, with imported quantities almost flat (143 212 tonnes to 147 441 tonnes). The import price increased by a modest 16.7 %. As a result, the trade deficit narrowed fractionally from €5.55 billion to €5.54 billion, even though net-import reliance stayed above 96 % throughout.

| Year | Imports (value, € billion) | Imports (quantity, tonnes) | Trade deficit (€ billion) |
|---|---|---|---|
| 2022 | 6.03 | 143 212 | 5.55 |
| 2023 | 5.78 | 127 455 | 4.72 |
| 2024 | 7.05 | 141 855 | 5.67 |
| 2025 | 7.24 | 147 441 | 5.54 |

## Supplier diversification reshapes import channels while export markets broaden

Both sides of the trade map are becoming less concentrated. On the import side, China retains its leadership but new Asian players are gaining share; on the export side, the EU is sending more modules to a wider array of partners.

### Viet Nam challenges China’s dominance, and secondary Asian suppliers expand

China remained the largest source of imports, supplying €3.22 billion in 2025, only 3.0 % above its 2022 level. In contrast, imports from Viet Nam surged by 93.8 %, reaching €1.91 billion. Other notable risers include the Republic of Korea (+72.3 %) and Indonesia (+645.9 %), while Malaysia shrank by 44.0 %. The import concentration HHI fell from 4 122 to 3 300, confirming a meaningful diversification.

| Import partner | 2022 value (€ billion) | 2025 value (€ billion) | Change |
|---|---|---|---|
| China | 3.13 | 3.22 | +3.0 % |
| Viet Nam | 0.99 | 1.91 | +93.8 % |
| Taiwan | 0.41 | 0.49 | +21.4 % |
| Korea, Rep. | 0.12 | 0.20 | +72.3 % |
| Malaysia | 0.26 | 0.15 | −44.0 % |
| Indonesia | 0.01 | 0.09 | +645.9 % |

### Exports to China, the United States, and new partners multiply

The EU’s top export destinations saw explosive growth. Shipments to China increased by 185.3 % to €801 million, to the United States by 629.6 % to €334 million, to Mexico by 535.8 %, and to the United Kingdom by 411.0 %. South Africa (+902.3 %) and the United Arab Emirates (+633.3 %) also emerged as significant buyers. The export HHI dropped from 4 183 to 2 937, illustrating a far more distributed export portfolio.

| Export partner | 2022 value (€ million) | 2025 value (€ million) | Change |
|---|---|---|---|
| China | 281 | 801 | +185.3 % |
| United States | 46 | 334 | +629.6 % |
| Mexico | 25 | 158 | +535.8 % |
| United Kingdom | 20 | 102 | +411.0 % |
| South Africa | 5 | 54 | +902.3 % |
| UAE | 2 | 14 | +633.3 % |

## High-value OLED and driver-integrated modules gain prominence

Disaggregating trade by the six sub-headings reveals a clear migration towards modules that integrate drivers and towards OLED technology, especially on the import side.

### LCD modules with drivers remain the backbone, but OLED imports accelerate

Modules with drivers or control circuits, of liquid crystals (852491) dominated both flows. In 2025 they accounted for €4.19 billion of imports and €1.40 billion of exports. However, OLED modules with drivers (852492) recorded the fastest import value growth, rising from €1.08 billion to €1.28 billion. Their import quantity almost quadrupled (from 9 460 tonnes to 12 445 tonnes), while the average price softened, suggesting improved availability.

| Sub-heading (imports) | 2022 value (€ billion) | 2025 value (€ billion) | Change |
|---|---|---|---|
| 852491 (LCD w/ driver) | 3.07 | 4.19 | +36.6 % |
| 852492 (OLED w/ driver) | 1.08 | 1.28 | +18.3 % |
| 852411 (LCD w/o driver) | 0.59 | 0.87 | +46.4 % |
| 852412 (OLED w/o driver) | 0.39 | 0.18 | −54.3 % |

### Export prices climb sharply, signalling a focus on premium modules

On the export side, modules with drivers (852491) saw their average price jump from €130 122 per tonne to €210 795 per tonne. OLED modules with drivers (852492) commanded prices around €218 000 per tonne in 2025. Shipments of modules without drivers remained small, but their unit values also rose steeply. This price escalation reflects the EU's growing specialisation in higher-end display modules that incorporate control electronics.

## Conclusion

EU trade in flat panel display modules (CN 8524) between 2022 and 2025 is characterised by rapid export expansion and a stabilising import bill. Exports have tripled in value, propelled by higher unit prices and a broader customer base. Imports have grown much more slowly, partly because of a diversification of supply away from China towards Viet Nam and other Asian producers. The product mix is shifting towards driver-integrated and OLED modules, adding to the value density of trade. Despite these positive trends, the EU remains more than 96 % reliant on imports, underlining a structural vulnerability that export growth alone cannot yet offset. The upward trend in EU production volumes—from an estimated 2 797 units in 2022 to 200 000 units in 2024—and an export propensity reaching 668 % of production value in 2024 hint at a strengthening domestic industrial base, but further monitoring of supply-chain concentration and technological upgrading will be essential.

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