Market evolution: Food processing machinery (CN 8438) — 2015–2025

Introduction

The EU's trade in food processing machinery (HS 8438) recorded a decade of profound transformation between 2015 and 2025. While the volume of goods shipped abroad contracted, export revenues climbed steeply on the back of surging unit prices. A major domestic production scale-up, combined with a reshuffling of trade partners and a widening surplus, reinforced the bloc's industrial self-reliance. This report dissects the main dynamics behind these trends, using the official trade, production and concentration data available on the trade dashboard.

Price-Driven Export Boom Compensates for Shrinking Volumes

Export unit values surged by 56%, enabling a 36.8% value gain despite a 12.3% drop in tonnage

Between 2015 and 2025 the EU's extra-EU exports of food processing machinery grew by 36.8% in value, from €5.06 billion to €6.92 billion, even though the quantity shipped fell by 12.3%. The entire expansion was generated by a steep rise in the average export price, which climbed from €27 360 to €42 681 per tonne (+56.0%). This indicates a strong shift towards higher-value machinery and after-sales parts, as well as a favourable pricing environment for EU producers. The trade balance consistently remained in surplus, swelling from €4.44 billion to €5.94 billion (+33.7%).

Indicator (exports)	2015	2025	Change
Value (EUR)	5,058.9 M	6,918.4 M	+36.8%
Quantity (tonnes)	184,902	162,092	–12.3%
Unit price (EUR/tonne)	27,360	42,681	+56.0%
Trade balance (EUR)	4,443.8 M	5,940.2 M	+33.7%

Source: Trade overview

Import values grew more evenly, but the surplus widened nonetheless

Imports expanded by 59.0% in value and 29.3% in quantity, while import unit prices increased by 23.0% — a much milder inflation than on the export side. Consequently, the already large trade surplus grew by one third, boosting the EU's net-exporter position.

Indicator (imports)	2015	2025	Change
Value (EUR)	615.1 M	978.2 M	+59.0%
Quantity (tonnes)	37,546	48,559	+29.3%
Unit price (EUR/tonne)	16,383	20,143	+23.0%

Bakery machinery and parts anchored export growth, while brewery machinery exports collapsed

A breakdown by product segment reveals that the value gains were concentrated in bakery machinery (HS 843810), parts (HS 843890) and "other" machinery (HS 843880). In contrast, exports of brewery machinery (HS 843840) halved in value, falling from €372 million to €160 million.

Export segment	2015 (€ M)	2025 (€ M)	Change
Bakery (843810)	1,060	1,383	+30.5%
Parts (843890)	987	1,614	+63.6%
Other (843880)	835	1,370	+64.0%
Brewery (843840)	372	160	–56.9%

Segment details: Product compare

Partner Realignment: U.S. Dominance, Russia's Retreat and Import Shocks

The United States became the standout destination, while Russia suffered a 32.4% decline

The geography of EU exports underwent a marked rebalancing. Shipments to the United States soared by 85.7%, reaching €1.45 billion in 2025, solidifying its position as the top customer. Exports to the United Kingdom grew 61.1%, to €458 million, and to Türkiye and Canada by 68.1% and 88.3% respectively. By contrast, exports to the Russian Federation dropped 32.4%, reflecting the impact of trade restrictions. Exports to China also edged lower (–16.1%).

Top export partners	2015 (€ M)	2025 (€ M)	Change
United States	782	1,453	+85.7%
United Kingdom	284	458	+61.1%
Türkiye	195	328	+68.1%
Canada	105	198	+88.3%
Russian Federation	497	336	–32.4%
China	256	215	–16.1%

Source: Top partners

Imports from Asian competitors surged, but a UK price shock in 2023 disrupted established patterns

On the import side, Asian suppliers expanded their footprint rapidly. Imports from China more than doubled (+128.8%), from India multiplied by a factor of more than five (+430.8%), and from Türkiye jumped by 126.6%. The United States also increased its sales to the EU by 66.6%. Imports from the United Kingdom, however, experienced a severe price shock in 2023: the unit price spiked by 143.7% (abnormality 230.6) while volumes fell by over half. This shock persisted into 2024–2025, with prices remaining elevated near €19 300/tonne.

Top import partners	2015 (€ M)	2025 (€ M)	Change
United States	139	231	+66.6%
China	91	209	+128.8%
Switzerland	132	116	–12.3%
United Kingdom	101	96	–5.3%
Türkiye	24	55	+126.6%
India	4	22	+430.8%
Norway	9	24	+157.3%

Export concentration increased slightly, while import sources became more diverse

The Herfindahl-Hirschman Index (HHI) for exports rose from 514 to 648 (+26.0%), signalling that export sales have become somewhat more concentrated, largely because of the burgeoning role of the United States. Conversely, the import HHI fell from 1,549 to 1,347 (–13.1%), indicating marginally greater diversification of supply sources. For details, see the concentration data. Additional volatility measures confirm that import flows from the UK and India were among the most erratic, while the US and Switzerland proved more stable (volatility chart).

Rising Domestic Production Strengthens EU Self-Sufficiency

EU production value soared from €7.4 billion in 2015 to €13.6 billion in 2024, reinforcing the industrial base

EU domestic production of food processing machinery experienced a dramatic scale-up. In value terms, output rose from €7.38 billion in 2015 to €13.59 billion in 2024, an increase of 84.1%. When looking at the earliest available production record (2003), the growth reaches 202.7%. Quantity data show more volatility, with a peak of 4.57 million tonnes in 2022, but the trend remains upward (2.13 million tonnes in 2015 to 2.51 million tonnes in 2024). The existing figures should be interpreted with care, as they carry partial estimate or rounding flags, yet the direction is unequivocal.

Year	Production value (€ M)	Production quantity (tonnes)
2015	7,383	2,128,146
2020	7,834	1,158,098
2022	13,015	2,461,070
2024	13,593	2,514,024

Source: Production volumes

Italy, Denmark and the Netherlands remain the most specialised, but Germany leads in absolute output

In 2025, the most specialised EU reporters (as measured by RSCA) were Denmark (0.58), Italy (0.47), Latvia (0.21), the Netherlands (0.21) and Slovakia (0.17). Italy alone accounted for 22.0% of EU production, the Netherlands 22.3%, highlighting their deep integration in this sector. Germany, despite a huge absolute export value (€1.67 billion in 2025), held an RSCA of –0.02 — it is not specialised in food machinery relative to its overall trade basket. At the opposite end, Malta, Ireland, Cyprus, Croatia and Estonia showed very little orientation towards this product group. These patterns are visible in the specialisation map.

Net import reliance moved deeper into negative territory, confirming low external vulnerability

The EU's net import reliance for this machinery category was already deeply negative in 2015 (–65.2%) and fell further to –77.6% in 2024 (net-import reliance). In parallel, trade intensity — the sum of exports and imports relative to production — rose from 49.6% to 53.6% (trade intensity), and export propensity climbed from 46.2% to 50.4% (export propensity). These figures confirm that the sector has become even more export-oriented and less dependent on foreign supply, cushioning it against external shocks.

Conclusion

The EU's food processing machinery trade between 2015 and 2025 has been defined by a sharp rise in unit values that drove export growth despite falling physical volumes. The United States has emerged as the pre-eminent partner, while trade with Russia has contracted dramatically. At the same time, a strong expansion of domestic production, led by Italy, Denmark and the Netherlands, has deepened the EU's status as a net exporter and enhanced its industrial autonomy. Trade-weighted vulnerability indicators are all favourable, and the diversified import portfolio, albeit punctuated by a severe UK price shock, offers additional resilience. Moving forward, sustaining the high-value positioning and monitoring partner-specific volatility will be key to preserving the sector's robust surplus.

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