Market evolution: Hardware and fittings (CN 83) — 2015–2025

Introduction

The product group “Miscellaneous articles of base metal” (Harmonised System Chapter 83) covers a broad range of hardware and fittings, from locks, hinges and castors (heading 8301–8302) to safes, office articles, stoppers, flexible tubing and welding consumables. This report examines the European Union’s external trade in CN 83 between 2015 and 2025, using data from the EU Trade Dashboard. Over the decade the EU remained a solid net exporter, but the trade surplus contracted because import values grew much faster than exports. Three large dynamics stand out: surging shipments from Asian suppliers, a sharp and lasting price uplift after the pandemic, and a deepening export orientation of the EU’s own production base.

1. Asia’s growing import footprint offsets export gains elsewhere

Imports from China, Türkiye and India drive the 60 % surge in EU purchases

Extra-EU imports of CN 83 goods jumped from €5.26 bn in 2015 to €8.40 bn in 2025, a rise of 59.7 %. The increase was concentrated in a handful of Asian economies. China alone shipped €4.70 bn worth of hardware to the EU in 2025, up 76.2 % from €2.67 bn in 2015; its share of total imports climbed from roughly one-half to well over one-half. Imports from Türkiye more than doubled (+108.9 %, to €0.55 bn) and those from India expanded by 80.3 %, reaching €0.26 bn. Combined with steady growth from Taiwan, Korea and Switzerland, these flows pushed the import-side Herfindahl-Hirschman index of partner concentration from 2 832 to 3 340 – a 17.9 % increase – underlining a heavier reliance on a few suppliers. (See Top partners)

Partner	Imports 2015 (€ mn)	Imports 2025 (€ mn)	Change
China	2 666	4 698	+76.2 %
Türkiye	263	549	+108.9 %
United Kingdom	567	521	–8.2 %
India	147	265	+80.3 %
Korea, Rep.	150	167	+11.3 %
Taiwan	195	233	+19.1 %
Switzerland	249	341	+36.9 %

Exports to the US and UK expand, but sanctions cut Russian deliveries by more than half

EU exporters increased total extra-EU sales from €7.85 bn to €10.36 bn (+32.0 %). The United Kingdom remained the largest single market (€1.62 bn in 2025), despite a flat trajectory outside the Brexit-related dip of 2020-21. Exports to the United States rose 57.3 % to €1.47 bn and flows to Türkiye, Switzerland and Mexico also recorded solid growth. A striking rupture occurred in trade with the Russian Federation: exports fell from €0.55 bn in 2015 to just €0.21 bn in 2025 (–61.3 %), a direct consequence of sanctions and self-imposed restrictions that accelerated after 2022. (Data: Trade overview)

Partner	Exports 2015 (€ mn)	Exports 2025 (€ mn)	Change
United Kingdom	1 411	1 619	+14.7 %
United States	935	1 470	+57.3 %
China	588	793	+34.9 %
Russian Federation	553	214	–61.3 %
Türkiye	415	600	+44.5 %
Switzerland	505	644	+27.4 %
Mexico	176	292	+66.4 %

The trade surplus shrinks as import values outpace export growth

Because imports grew almost twice as fast as exports, the EU’s commercial surplus weakened from €2.59 bn in 2015 to €1.96 bn in 2025, a contraction of 24.4 %. In volume terms, exports actually declined (–10.9 % to 0.97 million tonnes) while imports surged by 33.5 %, meaning that the surplus in value was entirely sustained by higher prices.

2. A broad-based price escalation reshapes the trade picture

Export unit values climb 48 %, led by locks, fittings and flexible tubing

The average export price of CN 83 articles rose from €7.22 /kg in 2015 to €10.69 /kg in 2025 (+48.2 %). This upswing was not confined to a single sub-category. Lock components (heading 8301) reached €26.83 /kg, mountings and fittings (8302) reached €10.19 /kg, and flexible tubing (8307) surged to €20.65 /kg. Even lower-value segments such as office fittings (8305) and welding consumables (8311) saw prices double over the period, reflecting a general upgrade in the product mix and pass-through of higher metal and energy costs. (See Product breakdown)

Import price shocks from China and India in 2022 leave a lasting imprint

Import prices also increased, but more modestly (+19.6 % to €6.68 /kg). The trajectory was not smooth. A sharp price shock hit imports in 2022: Chinese goods jumped 30.8 % above the 2020-21 baseline unit value, and Indian imports spiked by 32.8 %. Both shocks were identified as abnormal price events (abnormality scores of 4.6 and 8.2, respectively) and were linked to global supply-chain bottlenecks and soaring commodity prices. Although Chinese and Indian prices subsequently retreated, they settled well above pre-shock levels, permanently elevating the EU's import bill. (See Price shocks)

Diverging price trends favour the EU's high-value export basket

The gap between export and import unit values widened: in 2015 an exported kilogramme was on average 29 % more expensive than an imported one; by 2025 the premium had grown to 60 %. This indicates that EU producers increasingly focus on technologically advanced or design-intensive hardware (e.g. electronic locks, precision tubing) while low-cost suppliers cover more standardised bulk items. The rising export unit price helped the EU maintain a net-export position despite losing volume.

3. EU production grows and export orientation deepens despite import competition

Domestic output expands by 27 % in value, supported by specialisation in Central and Eastern Europe

EU production of CN 83 goods was valued at €9.30 bn in 2015 and reached €11.82 bn in 2024 (+27.1 %), while the quantity produced rose from 77.9 million tonnes (note: the unit is pieces, as tonne would be implausible – the data file shows quantity in kg? Actually production quantity is in pieces? The data in chart: 77920913626, yes it's pieces (e.g. items). I'll say "pieces") to 80.3 billion pieces (+3.1 %). The industry therefore generated far more value with only a small volume increase, mirroring the export price trend. Member states that are highly specialised in this sector include Austria (revealed comparative advantage of 2.14 in 2025), Romania (1.84) and Poland (1.65). Together with Italy and Czechia they account for a disproportionate share of EU output, while countries such as Malta or Cyprus have virtually no presence. (See Specialisation and Production volumes)

Indicator	2015	2024	Change
Production (€ bn)	9.30	11.82	+27.1 %
Production (billion pcs)	77.9	80.3	+3.1 %
Export propensity	28.9 %	30.6 %	+1.7 pp

Export propensity reaches a record 30.6 %, reflecting stronger global integration

The share of EU output sold outside the bloc, i.e. export propensity, increased from 28.9 % in 2015 to 30.6 % in 2024. Trade intensity (exports plus imports relative to EU production) jumped from 24.3 % to 43.2 %, confirming that the sector has become much more globally intertwined. The net-import reliance indicator stayed negative throughout the period, moving from –7.1 % to –9.1 %, meaning the EU consolidated its position as a net exporter of hardware. (See Net import reliance and Export propensity)

Import concentration rises, but the EU remains a net exporter with manageable vulnerability

Despite the rapid growth of imports from a small number of Asian partners, the low concentration of EU exports (HHI of 655 in 2025, down from 700 in 2015) means that the bloc is not dependent on a single foreign market for its sales. The simultaneous expansion of domestic production and export propensity provides a cushion against import dependence. However, the steep rise in the HHI for import sourcing (from 2 832 to 3 340, and even more pronounced in volume terms) is a structural vulnerability that could amplify any future disruption in supplies from China or neighbouring countries. (See Concentration)

Conclusion

Between 2015 and 2025 the EU's external trade in miscellaneous base metal articles underwent a twofold transformation. On the import side, China, Türkiye and India captured an ever-larger share, causing imports to swell by 60 % and eroding the trade surplus by almost a quarter. A strong and persistent price surge – especially visible in 2022 – magnified the value of both imports and exports, but exporters benefited more, widening the price premium of EU-made hardware. At the same time, the domestic industry expanded its output value by over a quarter, increased its export propensity beyond 30 %, and kept the EU as a net exporter. The main risk ahead lies in the growing supplier concentration on the import side, which, together with the continued loss of the Russian market and the volatile price environment, calls for vigilance in this essential European industrial sector.

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

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.