EU TRADE EXPLORER

Market evolution: Hardware mountings and fittings (CN 8302) — 2015–2025

Introduction

Between 2015 and 2025, EU external trade in base-metal mountings, fittings and similar articles (CN 8302) expanded robustly in value terms, yet the underlying volume and price dynamics paint a more nuanced picture. The EU remained a net exporter, but its trade surplus shrank as imports grew faster than exports, and export volumes actually declined. This report examines the main forces behind these developments: a widening gap between import and export volume trajectories, a sharp reorientation of trading partners following geopolitical shocks, and a product-level transformation marked by rising unit values and changing specialisation patterns within the EU. All figures are taken from the EU Trade Dashboard; links to the relevant dashboards are provided for direct verification.

A shrinking surplus hidden behind rising values

Export value climbs by 29 % while the physical volume of goods shipped shrinks

EU trade overview

The nominal value of EU exports rose from EUR 3.84 billion in 2015 to EUR 4.96 billion in 2025, an increase of 29.0 % (peaking at EUR 5.23 billion in 2022). Over the same period, however, exported tonnage fell by 10.3 % from 542.6 thousand tonnes to 486.6 thousand tonnes. The entire value gain therefore came from higher unit prices: the average export price jumped from EUR 7 087 per tonne to EUR 10 190 per tonne (+43.8 %). This indicates a structural shift towards higher value-per-kilo products or a significant price inflation that far outpaced volume.

Import surge outpaces exports, eroding the trade balance

On the import side, value grew by 59.2 %, from EUR 2.68 billion to EUR 4.27 billion, and volume expanded by 38.3 % (from 544.4 thousand tonnes to 753.1 thousand tonnes). The import unit price rose only 15.1 %, much less than for exports. As a result, the EU's trade surplus in this category fell from EUR 1.16 billion to EUR 0.69 billion (–40.7 %). The surplus erosion reflects a combination of robust domestic demand for imported hardware and the fact that EU exporters are selling fewer tonnes, albeit at much higher prices, while importers are shipping ever greater volumes with only modest price increases.

Geopolitical shocks reshape the partner landscape

China's overwhelming import presence and the 2022 price shock

Top partners by value

China remained the dominant source of imports, supplying goods worth EUR 1.54 billion in 2015 and EUR 2.52 billion in 2025 (+63.6 %). A notable event identified by the dashboard was a price shock in 2022: the unit value of Chinese imports jumped by 26.8 % compared to the 2020-2021 baseline, reaching EUR 5 410 per tonne. This spike, classified as highly abnormal (abnormality score 4.6), coincided with global supply chain disruptions and elevated raw-material costs. After 2022 the price partially receded but remained well above pre-shock levels (EUR 4 739 per tonne in 2023-2024).

Collapse of exports to Russia and the sustained role of the US, UK and Türkiye

Volatility & shocks

The EU's export map was profoundly altered by sanctions and geopolitical tensions. Exports to the Russian Federation dropped by 48.6 %, from EUR 355 million to EUR 183 million, with the sharpest contraction after 2022. In contrast, exports to the United States grew by 51.3 % (EUR 515 million to EUR 779 million), making it the largest destination. Shipments to the United Kingdom recovered after a post-Brexit dip (EUR 442 million in 2020) to a new peak of EUR 625 million in 2025 (+9.9 % overall). Türkiye, Switzerland and a broader "other" group also showed solid gains, while exports to China, after peaking at EUR 812 million in 2021, fell back to EUR 430 million in 2025, partly due to China's own economic slowdown and increased domestic production.

Diversification of import sources: Türkiye and India gain ground

On the import side, while China's share remained very high, alternative suppliers grew rapidly. Shipments from Türkiye more than doubled (+116.1 %) to EUR 307 million, and imports from India surged by 130.6 % to EUR 110 million. Even imports from the United Kingdom contracted slightly (–8.0 %), partly reflecting the new trading relationship after Brexit. The concentration of imports measured by the Herfindahl-Hirschman Index (HHI) edged up from 3 490 to 3 695, indicating a still highly concentrated supply structure albeit with some diversification at the margin. Export concentration, in contrast, fell from 709 to 647, confirming the EU's broadly diversified customer base.

Product-segment shifts and the geography of EU specialisation

Motor vehicle mountings: a tale of two flows

Product segment breakdown

The sub-category “mountings for motor vehicles” (830230) exhibited the most striking divergence. EU imports of these articles grew from EUR 289 million to EUR 622 million (+115 %), while exports declined from EUR 698 million to EUR 615 million (–11.9 %). This suggests that European vehicle manufacturers are increasingly sourcing these components from outside the EU, eroding the traditional export surplus in this segment.

Furniture, building fittings and hinges remain the backbone of EU exports

Furniture mountings (830242) were the largest export category, rising from EUR 1 015 million to EUR 1 387 million. Hinges (830210) and building mountings (830241) also recorded steady export expansion (both around +33 %). Import volumes grew in all these segments too, but the EU maintained a clear export surplus in each. Unit values on the export side rose substantially across the board; for instance, furniture mountings export prices increased from EUR 4 679 to EUR 6 479 per tonne, indicating a move towards higher-quality, higher-priced items.

Central Europe anchors the EU’s revealed comparative advantage

Specialisation map

In 2025, the member states with the strongest revealed comparative advantage (RCA) were Austria (RCA 3.63), Germany (1.47), Slovakia (1.69), Slovenia (1.48) and Poland (1.30). Austria alone accounted for 12 % of total EU exports in this chapter, despite representing only 3.3 % of extra-EU exports overall. This geographical concentration is reflected in the export HHI, which remained low at 647, but the intra-EU production is clearly concentrated in a cluster of central European countries. At the opposite end, Malta, Luxembourg and Cyprus display virtually no specialisation, underscoring the capital- and scale-intensive nature of this hardware industry.

Conclusion

Over the decade 2015–2025, the EU’s external trade in hardware mountings and fittings became a high-value, lower-volume activity, with export prices rising far faster than import prices. That shift allowed the EU to preserve a trade surplus despite a steady erosion caused by booming import volumes, largely from China, Türkiye and India. Geopolitics reshuffled the partner map: Russia’s share collapsed while the United States and the United Kingdom gained importance; on the import side, China strengthened its position but a price shock in 2022 reminded buyers of the associated vulnerability. Within the product mix, motor vehicle mountings turned into a major import growth area, while furniture and building fittings remained the EU’s stronghold. The resilience of this surplus will likely depend on the EU’s ability to keep moving up the value ladder and to manage the risks inherent in a highly concentrated import supply.

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