

Market evolution: Ignition and starting equipment (CN 8511) — 2015–2025

Introduction

The market for electrical ignition and starting equipment (CN 8511) covers components vital for internal combustion engines: from spark plugs and starter motors to alternators and ignition coils. Over the decade from 2015 to 2025, the European Union's external trade in these goods underwent a profound transformation. The aggregate trade balance turned from a deficit into a solid surplus, while the geographical orientation of both imports and exports was reshaped by Brexit, sanctions on Russia, and the growing weight of Asian and North American partners. This report distils the main dynamics into three core themes, using the dashboard data to quantify and interpret the shifts.

1. A trade surplus emerges: value surges while volumes shrink

Export value climbs 42%, import value grows only 25%, flipping the balance from deficit to surplus

EU-27 external trade in heading 8511 switched from a deficit of €137 million in 2015 to a surplus of €129 million in 2025. Export value rose from €1.76 billion to €2.50 billion (+41.7%), while imports advanced only from €1.90 billion to €2.37 billion (+24.7%). Over the same period, exported quantities actually fell by 4.8% and imported quantities dropped by 13.9%, indicating that value growth was driven almost entirely by price increases.

Indicator	2015	2025	Change
Exports (€ bn)	1.76	2.50	+41.7 %
Imports (€ bn)	1.90	2.37	+24.7 %
Trade balance (€ mn)	–137	+129	turned positive
Export price (€/t)	18 710	27 841	+48.8 %
Import price (€/t)	10 885	15 760	+44.8 %

Price inflation accounts for the reversal; physical volumes contract

Export unit values jumped by 48.8% and import unit values by 44.8%, showing that the sector experienced strong price inflation across the board. As a result, even though the EU

shipped fewer tonnes of finished equipment (89.7 kt in 2025 vs. 94.2 kt in 2015) and imported far less by weight (150.3 kt vs. 174.6 kt), the higher value per unit more than compensated for the volume loss. This pattern reflects a shift towards more sophisticated, higher-priced components, a trend visible across all sub-categories.

EU production value grows 84% while physical output falls 27%

The *production* data underlines the same story: EU manufacturing value soared from € 6.1 billion in 2003 to € 11.2 billion in 2024 (+83.7%), while the quantity of units produced contracted from 642 million to 468 million (−27.1%). The implied average production price more than doubled, consistent with the steep rise in trade unit values. Thus, the EU’s ignition and starting equipment industry became more premium-oriented, shedding low-value volume in favour of high-value output.

2. Realignment of trading partners: China and the US surge, Russia collapses, and the UK fades

Exports pivot to China (+166%) and the United States (+43%), while Russia vanishes

The top export partners table captures the re-routing of EU sales. Shipments to China leapt from € 167 million to € 443 million (+166%), and deliveries to the United States increased from € 383 million to € 547 million (+42.9%). Conversely, exports to the Russian Federation collapsed from € 105 million to just € 11.7 million (−88.8%) and were completely absent in 2024-2025, as sanctions took full effect. The United Kingdom, once the EU’s second-largest export destination, fell from € 348 million to € 280 million (−19.5%), a decline linked to post-Brexit trade barriers.

Export partner	2015 (€ mn)	2025 (€ mn)	Change
United States	383	547	+42.9 %
China	167	443	+166.0 %
United Kingdom	348	280	−19.5 %
Türkiye	126	182	+44.6 %
Russian Federation	105	11.7	−88.8 %
Mexico	52	112	+115.7 %
Brazil	49	85	+74.8 %

Imports: China overtakes Japan as the largest supplier; Türkiye and Poland emerge as regional hubs

On the import side, China's shipments to the EU surged by 85.9% to €613 million, surpassing Japan, which declined 9.7% to €592 million. Türkiye strengthened its role as a near-shore supply base (€173 million → €284 million, +64.3%), while imports from Mexico and the United Kingdom contracted sharply (−63.3% and −46.5%, respectively). A large part of the dynamic is also explained by the rapid growth of trade within the EU single market: Poland's intra-EU imports from other member states rocketed by 217% (€87 million → €275 million), reflecting its growing position as an assembly hub for the automotive supply chain.

Import partner	2015 (€ mn)	2025 (€ mn)	Change
China	330	613	+85.9 %
Japan	655	592	−9.7 %
Türkiye	173	284	+64.3 %
Korea, Rep. of	103	137	+33.6 %
India	85	130	+52.1 %
United Kingdom	124	66	−46.5 %
Mexico	74	27	−63.3 %

Concentration remains moderate but import volumes become more polarised

The Herfindahl-Hirschman index for import value fell slightly from 1 767 to 1 652 (−6.5%), while the same index for import *volumes* surged by 67.3%, climbing from 1 757 to 2 940. This means that a handful of partners (notably China) now account for a much larger share of the physical tonnage imported, even though value dispersion has not tightened dramatically. The EU thus remains moderately diversified in value terms, but the physical supply chain is concentrating rapidly.

3. Specialisation, premiumisation and the shock of geopolitical disruptions

Hungary, Slovenia and Poland show the strongest revealed comparative advantage

In 2025, the specialisation map highlights Hungary (RCA 4.1), Slovenia (RCA 3.7) and Poland (RCA 1.7) as the EU economies most specialised in this product group. These countries host extensive automotive-component manufacturing, often linked to German and

French original equipment manufacturers. At the other extreme, Cyprus, Ireland, Greece, Malta and Luxembourg display negligible RCA values, reflecting their low involvement in the industry.

Production value up 84% despite a 27% drop in quantity: the premiumisation of EU output

The sharp divergence between production volume and value illustrates a systematic move toward higher added value. EU factories produced fewer but far more expensive units. This shift is also visible at the disaggregated level: the average export price of spark-plugs more than doubled from € 36 400 /t to € 84 300 /t, and generators' export price rose from € 11 600 /t to € 23 500 /t. The industry successfully upscaled its product mix towards advanced engine components, sensors, and integrated starter-generators linked to hybrid and high-performance engines.

Volatility concentrated in the Russian and Tunisian markets; a supply-chain shock tested resilience

Two stand-out shocks are detected by the dashboard:

- **Russian export ban (supply shock):** EU exports to Russia collapsed by 98.7% around 2024, with the quantity falling from an 8-year average of 8 751 tonnes to virtually zero. The shock was extreme (abnormality 3.3) and removed a market that once represented 6.2% of EU exports.
- **Tunisian price shock:** In 2022, export unit prices to Tunisia jumped by 57.8% (abnormality 13.0) while volumes halved, possibly reflecting a temporary disruption or a re-orientation toward higher-grade items.

These events, combined with the high volatility in imports from the United Kingdom (CV 0.65) and Mexico (CV 0.57), underscore the sensitivity of this sector to geopolitical and logistical ruptures. Despite the shocks, the overall EU trade intensity rose from 31.8% to 36.5%, and the export propensity climbed from 19.1% to 22.7%, indicating that the bloc became more, not less, integrated into global flows.

Conclusion

Between 2015 and 2025, the EU's external trade in electrical ignition and starting equipment moved from a modest deficit to a healthy surplus, driven by a steep rise in unit values and a reorientation of export markets towards China and the United States. The collapse of Russian demand and the post-Brexit erosion of UK trade were more than offset

by dynamic growth in China, the Americas and near-shore partners such as Türkiye and Poland. Production data reveal a sharp upgrade in the industry's value chain, with fewer but far more expensive units manufactured. At the same time, import volume concentration intensified, and the sector felt the sting of geopolitical shocks. The net effect is an EU ignition-and-starting-equipment sector that is leaner, more valuable, and globally repositioned, yet more exposed to sudden partner-side disruptions.

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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](#).