

## Market evolution: Industrial controllers (CN 9032) — 2015–2025

### Introduction

This report examines the European Union's external trade in regulating or controlling instruments and apparatus (CN 9032) over the period 2015–01 to 2025-12. The product group covers thermostats, manostats, hydraulic/pneumatic controllers, other regulating instruments and their parts, excluding valves of heading 8481. The analysis highlights value, volume and price trends, major partner shifts, supply-side shocks and the evolution of the EU's competitive position. All figures come directly from the interactive dashboard; a complete product overview is available online.

### 1. Value buoyancy hides a sharp volume decline and relentless price escalation

Despite an apparently stable top-line trade performance, the data reveal a deep structural shift from volume-driven growth to high-price, high-value instruments.

#### Export value barely grows while quantities fall by more than a quarter

EU exports of industrial controllers remained broadly flat in value terms, moving from €4.66 billion in 2015 to €4.73 billion in 2025 (+1.6%). However, the physical volume dropped decisively – from 65 082 tonnes to 47 644 tonnes (–26.8%). Consequently, the average export price jumped from €71 531 per tonne to €99 276 per tonne (+38.8%). The table below illustrates this disconnect.

| Year | Export value (€ bn) | Export quantity (t) | Export price (€/t) |
|------|---------------------|---------------------|--------------------|
| 2015 | 4.66                | 65 083              | 71 531             |
| 2020 | 4.44                | 54 237              | 81 916*            |
| 2025 | 4.73                | 47 644              | 99 276             |

\*Interpolated from chart data.

## **Import growth likewise relies on price hikes, not stronger volumes**

Imports rose from €2.33 billion to €2.95 billion (+26.3%), but quantity increased only marginally (+4.6%, from 37 477 t to 39 216 t). The import unit price climbed from €62 298 to €75 199 (+20.7%). Thus, the trade surplus narrowed from €2.32 bn to €1.78 bn (–23.2%), yet the EU remains a substantial net exporter.

## **Price escalation becomes the defining feature of both flows**

Across the entire HS 9032 heading, prices trended upward almost without interruption. The export price reached its maximum in 2025 (€99 276/t), while the import price peaked in 2025 as well. The gap between export and import prices widened from 15% in 2015 to 32% in 2025, suggesting the EU increasingly specialises in higher-end instruments while importing lower-priced items.

## **2. Geopolitical shocks and supply-chain reconfiguration reshape the partner map**

The period was marked by sanctions, trade decoupling and diversification strategies that dramatically altered the EU's main trading partners.

### **The collapse of exports to Russia redraws the export landscape**

Exports to the Russian Federation plummeted from €222 million in 2015 to just €10 million in 2025 (–95.4%), as trade sanctions took full effect. The volume series confirms the abrupt halt: from 3 388 t in 2015 to 128 t in 2025. A price shock was detected in 2019 (+53.5% price surge while quantities had already started to fall), after which both value and volume collapsed. The partners dashboard shows this exceptional volatility (coefficient of variation 0.655).

### **China becomes the dominant import supplier, driven by a pronounced price shock**

China's share of EU imports soared – value rose 111.3% from €378 million to €798 million – making it the top import partner. Quantities also climbed (from 9 755 t to 19 375 t), but a notable price shock occurred in 2022: the unit price jumped 21.5% above baseline while volumes continued to grow. By 2025 prices had eased somewhat, yet remained 6% above the 2020-2021 baseline. Import concentration (HHI) increased by 25%, reflecting the growing weight of China.

## **Diversification gains traction: Türkiye, Mexico and the US cushion traditional market losses**

EU exports to traditional partners declined: to the United Kingdom –28.4% (partly post-Brexit redirection), to China –14.5% and to Japan –29.7%. However, exports to Türkiye expanded by 45.0% (reaching €451 million) and to Mexico by 69.5% (€202 million). Exports to the US held steady at around €890 million (–5.9%), remaining the top destination. On the import side, the United States increased its deliveries by 47.8% to €685 million, while Türkiye (+56.1%) and Korea (+12.8%) also grew. The net effect was a modest de-concentration of exports (HHI –16.3%) and a more concentrated import structure.

## **3. Production upgrading fuels a leap in export propensity and net export strength**

Behind the trade figures, the EU's own manufacturing base underwent a significant transformation towards higher-value products.

### **EU production value surges while output volume contracts**

Between 2015 and 2024 (latest available year), the EU's domestic production of regulating instruments saw its value climb from €5 936 million to €7 225 million (+21.7%\*, using 2024 as end of series). However, production quantity fell from 476 million units to 398 million units (–16.3%). The resulting unit value jumped by roughly 45%, a clear signal that EU manufacturers are moving up the technology ladder. The production dashboard provides the full volume-value series.

\*Note: exact percentage from 2015 to 2024, using given data.

### **Export propensity nearly doubles, driving the EU into a deeper net export position**

The share of EU production sold outside the bloc – export propensity – soared from 40.5% in 2003 to 68.7% in 2024 (+69.5% over the full historical series). Consequently, the net import reliance ratio became increasingly negative, moving from –15.0% in 2003 to –34.6% in 2024. This means the EU now exports the equivalent of 34.6% more than it consumes via imports – a strong indicator of competitive advantage. The latest figures can be tracked on the net import reliance and export propensity pages.

## Specialisation patterns confirm Central European centres of excellence

The revealed comparative advantage (RSCA) map for 2025 shows that several Central and Eastern European member states are highly specialised in this sector. Croatia (RSCA 0.46), Romania (0.45), Estonia (0.42) and Hungary (0.35) exhibit strong specialisation, while Ireland (−0.97), Cyprus (−0.97) and Greece (−0.83) are the least specialised. Germany, still the largest producer (33.8% of EU output), maintains a solid specialisation (0.23), but the emerging strength of Poland (RSCA −0.01, nearly proportional) and the Czech Republic (+0.02) indicates a broadening production base. The full specialisation profile is available [here](#).

## Conclusion

The EU's trade in industrial controllers from 2015 to 2025 exhibited a dual dynamic: stagnant volumes and rising prices reflecting a shift towards high-value, sophisticated instruments. While the overall trade surplus remains healthy, its composition has changed fundamentally. Geopolitically, the decoupling from Russia and the growing reliance on Chinese imports stand out, although the EU has successfully reoriented exports towards Turkey, Mexico and a stable US market. Domestically, rising production values, falling output quantities and a near-doubling of export propensity underscore a consolidated competitive edge. The EU not only remains a net exporter of regulating instruments but has decisively strengthened that position through a high-value manufacturing strategy.

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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](mailto:support@tradedashboard.eu). You can find my CV at [this address](#).