EU TRADE EXPLORER

Market evolution: Insulated wires and cables (CN 8544) — 2015–2025

Introduction

Insulated wires and cables (CN 8544) form a strategic backbone of the modern economy, spanning automotive wiring, low- and high-voltage electric conductors, optical fibre cables, and winding wires. This report examines the European Union's trade with non-EU partners between 2015 and 2025. The data reveal a decade of profound transformation: a growing structural trade deficit, a sharp rise in import volumes from a diversifying set of suppliers, a marked premiumisation of EU exports, and the imprint of geopolitical shocks on supply chains. The analysis is based exclusively on the figures provided in the dashboard, with links to the original data throughout.

A widening trade deficit driven by surging imports from near-shore economies

Imports have more than doubled in value, with volumes growing far faster than exports

Between 2015 and 2025, EU imports of CN 8544 goods rose from **€10.6 billion** to **€23.6 billion**, an increase of **124.0%**. Over the same period, exports grew by **47.1%**, from **€9.7 billion** to **€14.3 billion**. While export quantities contracted slightly (**–4.9%**), import quantities jumped by **86.5%**, from **0.84 million tonnes** to **1.56 million tonnes**. As a result, the trade deficit ballooned from **–€0.8 billion** in 2015 to **–€9.3 billion** in 2025.

Flow	2015 value (€ bn)	2025 value (€ bn)	Change (%)	2015 quantity (k tonnes)	2025 quantity (k tonnes)	Change (%)
Exports	9.74	14.33	+47.1	951.7	905.2	–4.9
Imports	10.56	23.65	+124.0	837.9	1 562.9	+86.5

General trade overview

Near-shore and emerging suppliers have captured a rapidly rising share of EU imports

The growth in imports has been heavily concentrated in a handful of suppliers that expanded their presence dramatically. Morocco, already a major hub, saw its exports to the EU rise from **€1.85 billion** to **€4.51 billion** (+144.3%). Tunisia grew from **€1.36 billion** to **€2.91 billion** (+114.8%). Serbia (+433.1%) and Türkiye (+169.2%) more than tripled and doubled their values respectively. China remained the single largest source, reaching **€4.49 billion** (+116.5%), but its growth rate was slightly below that of the fastest-growing near-shore producers, indicating a diversification of import origins.

Import partner	2015 (€ m)	2025 (€ m)	Change (%)
China	2 072	4 486	+116.5
Morocco	1 845	4 507	+144.3
Türkiye	684	1 841	+169.2
Tunisia	1 356	2 914	+114.8
Serbia	342	1 823	+433.1

Top import partners

The import structure remains moderately concentrated and has hardly changed

Despite the rapid expansion, the overall concentration of import sources has been remarkably stable. The Herfindahl-Hirschman Index (HHI) for imports in value terms moved only from **1 063** in 2015 to **1 077** in 2025 (+1.3%). This suggests that while individual emerging suppliers grew fast, no single player gained excessive dominance; instead, the EU's import basket broadened in a balanced manner.

Import concentration HHI

Export value grows through premiumisation, not higher volumes

Overall export volume has stagnated while unit values have surged

EU export quantities declined from **0.95 million tonnes** in 2015 to **0.91 million tonnes** in 2025 (–4.9%). Yet the export value rose by **47.1%**, implying a strong increase in the average export price, from approximately **€10 200 per tonne** in 2015 to **€15 800 per tonne** in 2025 (+54.6%). The EU is thus selling fewer, but far more valuable, cables and conductors to the rest of the world.

The United States has become the most dynamic export market

The United States overtook other destinations in terms of growth. EU exports to the US moved from **€0.81 billion** in 2015 to **€2.45 billion** in 2025 (+203.3%). In contrast, exports to the United Kingdom, the largest single market, remained almost flat (€2.07 billion to

€2.01 billion, –2.9%). Exports to Switzerland (+68.6%), Serbia (+163.4%) and China (+11.7%) also expanded, though more modestly.

Top export partners

The product mix reveals a clear shift towards high-value segments, especially fitted connectors and high-voltage cables

Looking inside the chapter, the largest export segment by value in 2025 is low-voltage conductors not fitted with connectors (854449), at **€4.62 billion**, followed by low-voltage conductors fitted with connectors (854442) at **€3.27 billion**, and ignition and other wiring sets for vehicles (854430) at **€2.03 billion**. All major export segments experienced notable price increases. For instance, the average price of ignition wiring sets (854430) climbed from **€20 700 per tonne** to **€54 900 per tonne**, and that of fitted low-voltage conductors (854442) from **€29 100 per tonne** to **€46 200 per tonne**. Optical fibre cables (854470) saw their export price rise from **€11 800 per tonne** to **€23 000 per tonne**.

Export segment (8-digit)	2015 value (€ m)	2025 value (€ m)	2015 price (€/t)	2025 price (€/t)
854449 (conductors ≤1 000 V, unfitted)	3 033	4 616	6 342	10 194
854442 (conductors ≤1 000 V, fitted)	2 138	3 273	29 084	46 191
854430 (ignition & vehicle wiring sets)	2 016	2 025	20 659	54 869
854460 (conductors >1 000 V)	1 053	2 104	6 299	8 759

Product segment breakdown

Eastern EU member states have become the most specialised exporters

By 2025, Romania, Hungary, Croatia and Czechia show the highest export specialisation in CN 8544, with revealed symmetric comparative advantage (RSCA) indices of **0.68**, **0.54**, **0.53** and **0.37** respectively. This points to a deeper integration of Central and Eastern European production sites into the EU’s cable export complex, probably related to automotive and electronics supply chains.

Specialisation map

Geopolitical shocks and the reconfiguration of supply chains

The near-total collapse of EU wire and cable exports to Russia stands out as a major supply shock

The dashboard detects a severe supply shock in EU exports to Russia. The volume of exports to Russia fell by **–98.2%** from a pre-2022 baseline, with the shock centred on 2025. The quantity dropped from a baseline average of around **21.9 thousand tonnes** per year to a mere **0.39 thousand tonnes** on average over the 2023–2025 period. In value terms, this destination accounted for only about **2.1%** of total EU exports before the shock, but the disruption illustrates how geopolitical events can abruptly sever long-standing trade links.

Supply shock details

A sharp price shock in imports from Türkiye highlights the volatility of near-shore supplies

In 2022, the EU experienced a **price shock** on imports from Türkiye: the unit value surged by **63.3%** (from a baseline of approximately **€4 860 per tonne** to **€7 930 per tonne**), even though the imported quantity remained virtually unchanged. This price level then persisted into the following years, signalling a permanent shift in the cost of Turkish cable products. As Türkiye accounted for around **8.9%** of total EU imports in value terms, this shock had a palpable effect on the aggregate import price.

Price shock details

Uncertainty and volatility vary widely by partner, with the UK and Turkey the most volatile among major import sources

The coefficient of variation (CV) of import quantities reveals that some EU suppliers are far more erratic than others. The United Kingdom shows the highest volatility (CV **0.55**), largely because its share plummeted after Brexit and the value dropped by 26.5%. Türkiye also exhibits high volatility (CV **0.43**), linked to the aforementioned price shock and to rapid volume swings. In contrast, Ukraine (CV **0.09**) and Tunisia (CV **0.15**) have been more stable suppliers. On the export side, the United States is the most volatile large destination (CV **0.48**), reflecting the rapid and uneven expansion of sales, while Switzerland (CV **0.05**) stands out as an extremely steady market.

Volatility data

Conclusion

The decade 2015–2025 reshaped the EU’s external trade in insulated wires and cables in three fundamental ways. First, a structural trade deficit emerged and deepened, as imports from a broadening group of near-shore and emerging economies more than doubled in value and grew strongly in volume. Second, EU exports underwent a process of premiumisation: while quantities stagnated, average prices rose sharply, and the product mix tilted toward higher-value cables, notably fitted connectors and high-voltage conductors, with the United States becoming a key growth market. Third, the period was punctuated by notable geopolitical shocks, including the near-disappearance of exports to Russia and a lasting import price jump from Türkiye, which, alongside varying levels of partner volatility, underscore the need for vigilance in supply-chain management. These dynamics collectively point to an EU cable sector that is increasingly specialised, integrated into global value chains, but also more dependent on imports for a wide range of cable products.

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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.