Market evolution: Iron and steel structures (CN 7308) — 2015–2025

Introduction

The European Union’s external trade in iron and steel structures (customs code 7308) has undergone a profound transformation between 2015 and 2025. The category covers a broad range of construction-related goods, from bridges and towers to doors, windows, scaffolding and various structural parts. Over this period the EU remained a net exporter, yet the trade surplus narrowed sharply as imports grew far faster than exports. This report examines the main dynamics behind these shifts, drawing exclusively on official extra-EU trade data.

Import Surge Dismantles the Long-Standing Trade Surplus

Extra-EU imports soar by 253 %, propelled by China and Türkiye

The value of EU imports of CN 7308 products rose from EUR 1.75 billion in 2015 to EUR 6.17 billion in 2025, a jump of 253 % EU trade in CN 7308 – overview. Import volumes almost tripled (+196 %), while the average import price increased by only 19 %. The surge is driven by a handful of large suppliers.

Partner (imports)	2015 (EUR mn)	2025 (EUR mn)	Change (%)
China	699.0	2 400.7	+243.5
Türkiye	104.9	1 081.9	+931.5
United Kingdom	214.1	776.6	+262.7
Viet Nam	29.5	262.2	+789.0
Bosnia and Herzegovina	41.9	164.6	+292.8
India	44.6	133.6	+199.3
Switzerland	228.4	316.9	+38.7

Top trade partners

China and Türkiye together accounted for more than half of all extra-EU imports in 2025. Turkish supplies expanded more than ten-fold, while Vietnamese imports multiplied by roughly eight, reflecting both competitive pricing and the EU’s growing reliance on these sources for basic and fabricated steel structures.

Export growth is price-driven; volumes barely above 2015 levels

Extra-EU exports of CN 7308 reached EUR 9.79 billion in 2025, an increase of 39 % over 2015. However, export volumes grew by only 3.6 %, indicating that the entire value gain is attributable to higher unit prices (+35 %). This suggests that EU producers have managed to pass on rising input costs and have shifted toward higher-value items, but they have not expanded their physical presence in external markets in a meaningful way.

Indicator	2015	2025	Change (%)
Export value	EUR 7 021 mn	EUR 9 785 mn	+39.4
Export quantity	2 505 k tonnes	2 597 k tonnes	+3.6
Export unit price	EUR 2 802/tonne	EUR 3 769/tonne	+34.5
Import value	EUR 1 746 mn	EUR 6 168 mn	+253.3
Import quantity	929 k tonnes	2 752 k tonnes	+196.3
Import unit price	EUR 1 880/tonne	EUR 2 242/tonne	+19.3
Trade balance	EUR 5 275 mn	EUR 3 617 mn	–31.4

EU trade in CN 7308 – overview

The trade balance contracts by EUR 1.66 billion, signalling rising external dependence

Despite still recording a surplus of EUR 3.62 billion, the EU’s net trade position in iron and steel structures deteriorated by 31 % over the period. The combination of explosive import growth and quantity-stagnant exports indicates that the EU’s traditional self-sufficiency in this sector is being eroded, with foreign suppliers capturing an increasing share of the European market for building and infrastructure components.

Geopolitical Realignment and the Recomposition of Trade Flows

The United States and the United Kingdom become the fastest-growing export destinations

Exports to the United States surged by 194.5 %, from EUR 565 million to EUR 1 664 million. The United Kingdom remained the largest single market, reaching EUR 1 699 million (+109 %). Together with Norway and Switzerland, these four mature markets absorbed the bulk of EU external shipments, while the overall geographic concentration of exports (measured by the Herfindahl-Hirschman index) more than doubled from 525 to 1 123 Market concentration & specialisation.

Partner (exports)	2015 (EUR mn)	2025 (EUR mn)	Change (%)
United Kingdom	812.4	1 699.2	+109.2
United States	565.2	1 664.2	+194.5
Norway	678.5	1 047.1	+54.3
Switzerland	745.4	956.4	+28.3

Sanctions erase Russia from the map; anomalous flows to ‘High seas’ multiply

Exports to the Russian Federation collapsed from EUR 235 million in 2015 to EUR 2.7 million in 2024 and zero in 2025 (–99 %). Meanwhile, shipments to the “High seas” category jumped from a negligible EUR 15.6 million to EUR 1 020 million, and those to “Countries and territories not specified” rose by 555 % to EUR 247 million. These atypical destinations now represent a significant share of total extra-EU exports, raising transparency concerns and potentially masking re-routing of goods to sanctioned or opaque markets.

Import reliance on volatile suppliers like Türkiye and Viet Nam intensifies

The expansion of imports from Türkiye (coefficient of variation of quantity: 0.77) and Viet Nam (CV 0.78) introduces significant supply-chain volatility Volatility by partner. Price-shock events were also detected: in 2022 import prices from Switzerland jumped 21 % while volumes remained stable, and on the export side 2019 saw a sharp price spike for Brazil and 2022 a severe price jump for Algeria Price shocks. The EU’s increasing dependence on a few high-volatility sources heightens the risk of disruption from political, economic or logistical shocks.

Product Mix, Specialisation and the Changing Geography of EU Supply

Structures n.e.s. (730890) dominates both import and export growth

The sub-category “Structures and parts of structures, n.e.s.” (code 730890) is by far the largest segment. Its import value quadrupled from EUR 1.10 billion to EUR 4.35 billion, while exports grew from EUR 4.76 billion to EUR 6.91 billion Product segment comparison. Towers and masts (730820) and scaffolding equipment (730840) also posted strong gains, notably on the import side.

Sub-heading	Imports 2025 (EUR mn)	Exports 2025 (EUR mn)
730890 (n.e.s.)	4 349.1	6 913.2
730820 (towers)	811.9	878.1
730840 (scaffold.)	721.6	988.7
730830 (doors/win.)	225.8	767.1
730810 (bridges)	60.2	238.0

Doors and windows command a persistent high-value niche in exports

Unit values for exported doors, windows and their frames (730830) stood at EUR 10 326 per tonne in 2025, more than three times the import unit price of EUR 3 198 per tonne. This wide and sustained premium points to EU manufacturers' competitive advantage in design-intensive, quality-certified and customised metal joinery. The supplementary quantity indicator (pieces) shows that imports are largely made up of mass-market items sold at around EUR 36 per piece, while the high per-tonne export price reflects low-weight, high-value fabricated units.

Northern and Eastern EU economies show the deepest revealed comparative advantage

According to the revealed symmetric comparative advantage (RSCA) for 2025, Estonia (0.53), Latvia (0.51), Poland (0.42), Croatia (0.37) and Portugal (0.37) are the most specialised member states in CN 7308 exports, while Malta, Ireland, Cyprus and France show the weakest specialisation Revealed comparative advantage. This maps closely to production cost advantages and traditional industrial structures in central and eastern Europe.

The Netherlands overtakes Germany as the top external exporter

In 2015 Germany was the dominant EU exporter of CN 7308, with EUR 1.89 billion in sales. By 2025 the Netherlands had surged to EUR 2.19 billion (+425 %), while German exports remained nearly flat at EUR 1.96 billion Top EU reporters. Denmark's exports also rose spectacularly (+392 %). Much of the Dutch increase is concentrated in the 730890 segment, likely reflecting the country's role as a logistical and trading hub for prefabricated steel structures sourced elsewhere in the EU.

Conclusion

EU trade in iron and steel structures (CN 7308) has been reshaped by a massive wave of imports, primarily from China, Türkiye and other emerging suppliers, which has halved the traditional trade surplus. Export growth has been almost entirely price-based, with volumes stagnating and destinations becoming more concentrated after the loss of the Russian market. Anomalous flows to “High seas” and unspecified territories raise questions about the final destination of a growing share of EU-manufactured structures. On the product side, the “structures n.e.s.” segment dominates, while doors and windows remain a high-value European specialty. Within the EU, specialisation is strongest in eastern and Baltic countries, and the Netherlands has replaced Germany as the single largest extra-EU exporter. The data suggest a structural shift toward greater external dependence and a more concentrated, volatile trade pattern that merits careful monitoring.

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