EU TRADE EXPLORER

Market evolution: Lighting fixtures (CN 9405) — 2015–2025

Introduction

This report examines the European Union’s external trade in luminaires and lighting fittings (CN 9405) over the period 2015–2025. It draws exclusively on annual trade and production data. The analysis reveals three central dynamics: a deepening structural trade deficit, a profound upgrade of the product mix toward high-value LED-based goods, and a substantial realignment of trade partners driven by geopolitical shocks and new market opportunities.

A Widening Trade Gap and Growing Import Dependence

The EU’s trade deficit in lighting fixtures has ballooned, driven by surging imports

While the value of extra-EU exports remained relatively stagnant (€ 4.31 billion in 2015 to € 4.26 billion in 2025, a drop of 1.2 %), imports rose from € 6.30 billion to € 8.00 billion (+26.9 %). The resulting trade balance deteriorated from a deficit of € –1.99 billion to € –3.74 billion, an 87.9 % widening. The worst point was reached in 2022, when imports peaked at € 9.52 billion and the deficit touched € –5.15 billion.

Indicator (EUR)	2015	2022 (peak)	2025
Extra-EU exports	4 310 M	4 369 M	4 259 M
Extra-EU imports	6 300 M	9 522 M	7 998 M
Trade balance	–1 990 M	–5 153 M	–3 739 M

Source: Trade overview

Net import reliance surged from near self-sufficiency to a structural dependency

The EU’s net import reliance climbed from just 1.5 % in 2015 to 27.5 % in 2025 (a staggering increase of 1 779 %). Even after the 2022 spike (33.2 %), the figure remained above 22 % for the entire 2023-2025 period, indicating that the lighting sector has moved well beyond a temporary post-pandemic distortion. The trade intensity almost tripled, from 27.7 % to 66.4 %.

China remains the dominant supplier, keeping import concentration extremely high

Extra-EU imports are heavily concentrated: China alone accounted for over 80 % of supplier value throughout the period, rising from € 5.06 billion in 2015 to € 6.75 billion in 2025 (+33.3 %). The Herfindahl-Hirschman Index (HHI) for imports, already extremely elevated at 6 498 in 2015, climbed to 7 208 in 2025. This one-supplier dependency makes the EU lighting market especially sensitive to disruptions in China.

See also: Concentration HHI

The LED Premiumisation and the Rise in Unit Values

Export value held steady while volumes plummeted, signalling a move to higher-value luminaires

Although extra-EU export value barely changed, the volume of exported goods shrank by 32.3 %, from 159 094 tonnes to 107 692 tonnes. Consequently, the average export price rose by 46.0 %, from € 27 090 per tonne to € 39 545. This indicates a decisive structural shift towards more sophisticated, higher unit-value products.

The import mix shifted decisively towards LED-specific products, with sharply higher unit prices

Starting in 2022, detailed product-segment data becomes available. In that year, LED-exclusive ceiling/wall fittings (CN 940511) and other LED luminaires (CN 940542) already dominated imports, together worth € 4.72 billion. By 2025, their combined import value stood at € 4.48 billion. Meanwhile, non-electrical luminaires (CN 940550) fell in value from € 248 million in 2015 to € 169 million in 2025. The unit values of LED imports, while gradually declining from their 2022 peak, remain substantially higher than those of conventional luminaires.

Import segment (EUR/kg)	2022 (peak)	2025
LED ceiling/wall (940511)	13.29	10.99
Other LED luminaires (940542)	16.14	13.59
Non-electrical luminaires (940550)	6.74	5.48

Source: Product segments

EU production mirrored the trend: value up, volume down, confirming a quality upgrade

Domestic production data (available until 2024) reinforces the trade picture. While the quantity produced dropped by 47.9 % from 2004-2024, the production value surged by 44.4 % to € 10.07 billion in 2024. The implied unit value of EU-produced luminaires has more than doubled since the mid-2010s, confirming that the industry has successfully shifted toward higher-value, often LED-based, output.

See: Production volumes

Geopolitical Shifts and Partner Volatility

The EU's export destinations are pivoting away from traditional neighbours and towards the US and Gulf markets

The top extra-EU export markets have undergone a significant reordering. While Switzerland and the United States have grown substantially, the United Kingdom has not regained its pre-Brexit levels and Russia has virtually disappeared as a destination.

Export partner	2015	2025	Change
Switzerland	491 M	640 M	+30.6 %
United States	504 M	598 M	+18.7 %
United Kingdom	703 M	599 M	–14.7 %
Saudi Arabia	153 M	192 M	+25.9 %
United Arab Emirates	199 M	228 M	+14.5 %
Russian Federation	264 M	66 M	–74.9 %

Source: Top partners

Russia's share collapsed amid sanctions, while the UK's post-Brexit decline accelerated

The most dramatic fall is Russia, which accounted for 6.1 % of extra-EU exports in 2015 but only 1.6 % in 2025. The UK, still the largest single destination in value terms, has seen its share erode continuously after 2020, with annual export values falling below € 600 million for the first time in 2024. Conversely, the US and Gulf countries have been reliable growth engines.

Supply-side volatility and price shocks in 2022 exposed vulnerabilities in key partner relations

The year 2022 stands out as a period of severe price shocks. Imports from China experienced a 31.3 % price surge (abnormality score 4.0), as documented by the Price shock analysis. On the export side, prices for shipments to Saudi Arabia almost doubled (+96 %), while those to China jumped by 52.5 %. The overall Volatility profile shows that Russia's import quantities were among the most volatile (CV 0.568), and import flows from Serbia and the United Kingdom were highly erratic.

Conclusion

Between 2015 and 2025, the EU's external trade in lighting fixtures has been reshaped by three powerful forces. The value of extra-EU imports surged, driven overwhelmingly by China, pushing the net import reliance from near-zero to more than a quarter of apparent consumption. At the same time, the product mix has undergone a rapid "LED-premiumisation": export and domestic production volumes contracted sharply while values held or rose, reflecting a successful shift toward higher-value luminaires. Finally, the geography of EU trade has been upended—traditional partners like Russia and the UK have given way to a diversified set of markets including the US, Switzerland, and the Gulf states. These dynamics present a dual challenge for European policy: managing a concentrated, import-dependent supply chain while capitalising on the industry's demonstrated ability to compete on quality and innovation.

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