EU TRADE EXPLORER

Market evolution: Liquid pumps (CN 8413) — 2015–2025

Introduction

This report examines the European Union’s external trade in liquid pumps and their parts (CN 8413) between 2015 and 2025. The product group covers everything from simple hand pumps and fuel-dispenser pumps to advanced centrifugal and reciprocating positive-displacement pumps, including parts. Over the decade, the sector displayed robust export growth, a sharp rebalancing of partner countries, and a strong rise in EU production capacity. The analysis draws solely on the figures supplied in the dashboard, highlighting the principal dynamics revealed by value, volume, price, and partner-level data.

Value over volume: the quality-driven growth of EU pump exports

Export earnings have risen 27 %, yet shipped volumes have actually contracted

Between 2015 and 2025, the total value of EU exports grew from €11 979 mn to €15 230 mn (+27.1 %). Over the same period, the tonnage exported shrank from 522 402 t to 471 058 t (–9.8 %). The divergence can be observed in the headline trade overview.

Indicator	2015	2025	Change
Export value (€)	11 979 524 481	15 229 553 439	+27.1 %
Export quantity (t)	522 402	471 058	–9.8 %
Average export price (€/t)	22 931	32 330	+41.0 %

The average unit price moved from €22 931/t to €32 330/t (+41.0 %), indicating that the EU sold pumps of higher unit value, moving up the value chain. This shift was broad-based: all major export product categories — centrifugals, parts, engine-pumps, reciprocating, rotary and others — recorded price increases (as detailed in the product segment breakdown). Centrifugal pumps (8413 70) and parts (8413 91) remained the largest export segments in value terms.

Imports grew more on volume than on price, keeping a lid on cost pressure

EU imports rose from €3 930 mn to €6 120 mn (+55.7 %), while imported tonnage climbed from 313 609 t to 426 015 t (+35.8 %). The average import price increased by a more modest 14.7 %. Consequently, the trade surplus widened from €8 050 mn to €9 109 mn (+13.2 %), demonstrating the EU’s sustained competitive advantage in this range of capital goods.

Indicator	2015	2025	Change
Import value (€)	3 929 553 718	6 120 197 822	+55.7 %
Import quantity (t)	313 609	426 015	+35.8 %
Average import price (€/t)	12 530	14 366	+14.7 %

Shifting trade lanes: the rise of China and Türkiye, and the vacuum left by Russia

China and Türkiye have become the dominant import sources

China more than doubled its export value to the EU (from €842 mn to €1 888 mn, +124.3 %), while Türkiye’s deliveries soared from €174 mn to €508 mn (+191.2 %). Imports from Serbia (up 391.2 %) and India (+116.3 %) also expanded rapidly. The United Kingdom, in contrast, remained broadly stable (+3.1 %). The detailed partner-level import data are available in the top partners by value table.

Import partner	2015 (€ mn)	2025 (€ mn)	Change
China	842	1 888	+124.3 %
United States	846	1 121	+32.5 %
United Kingdom	586	604	+3.1 %
Türkiye	174	508	+191.2 %
India	134	289	+116.3 %
Serbia	39	193	+391.2 %

EU exports pivoted toward the United States, Türkiye and other markets while Russia collapsed

On the export side, the United States remained the top destination, increasing from €2 038 mn to €3 026 mn (+48.5 %). Türkiye emerged as a fast-growing market for EU pumps (+83.6 %). The United Kingdom and Switzerland also recorded solid gains. The most dramatic change was the near-disappearance of sales to Russia: after reaching €786 mn in 2021, they plunged to €5.3 mn by 2025 (–99.1 %), a direct consequence of the sanctions regime. The partner-level export figures are available on the same top partners dashboard.

Export partner	2015 (€ mn)	2025 (€ mn)	Change
United States	2 038	3 026	+48.5 %
United Kingdom	1 115	1 431	+28.3 %
China	1 381	1 612	+16.7 %
Türkiye	518	951	+83.6 %
Russian Federation	593	5.3	–99.1 %
Switzerland	326	457	+40.2 %

Supplier concentration rose modestly, driven by China’s growing weight

The import-side Herfindahl-Hirschman Index (HHI) increased from 1 336 to 1 589 (+19.0 %), signalling a moderate rise in the concentration of external supply sources. The export-side HHI moved from 650 to 745 (+14.5 %), remaining at a low to moderate level. The HHI series can be consulted under concentration indicators. The increase in import concentration is largely attributable to China’s share, which reached almost 31 % of extra-EU imports by value in 2025.

From production boom to global integration: Europe’s pump industry extended its reach

Production volumes soared while domestic unit prices fell sharply

EU production quantity (in units) surged from 441 mn units in 2015 to 800 mn units in 2024, an increase of 81.5 %. Output value rose from €16 642 mn to €18 724 mn (+12.5 %) over the same span, indicating a steep decline in the average unit value of domestically produced pumps (from an estimated €37.8/unit to €23.4/unit). The production volumes chart shows that much of the volume expansion came from mass-produced items such as hand pumps and smaller centrifugal pumps, while higher-value segments maintained robust prices. This dual dynamic explains how the EU could sell more abroad at higher average prices even as total domestic unit prices fell.

Export propensity and trade intensity reached record levels

The share of production sold outside the EU (export propensity) climbed from 47.1 % to 79.4 %, and the trade-intensity ratio ((exports + imports)/production) rose from 55.2 % to 84.3 %, both reaching their highest points in the series. The net-import-reliance metric, already negative throughout, deepened from –41.0 % to –92.7 %, confirming that the EU’s pump sector has become a net exporter to an even greater extent. These indicators are summarised on the trade-intensity and export-propensity dashboards.

Specialisation remains concentrated in Central Europe and Italy

In 2025, the most specialised EU reporters were Romania (RSCA 0.2885), Italy (0.286), Czechia (0.2816), Germany (0.2016) and Hungary (0.1722). These countries combined advanced engineering know-how with competitive production costs, enabling them to dominate extra-EU exports. The ranking is available in the specialisation map. Meanwhile, among the Member States that are at the bottom of the specialisation list, Cyprus and Greece recorded RSCA values below –0.77, reflecting their tiny share of total EU pump exports.

Conclusion

Over the 2015-2025 period, the EU's external trade in liquid pumps exhibited two distinct but interrelated trends: a shift towards higher-value exports that allowed revenue to grow despite lower tonnage, and a rapid expansion of production capacity that turned the bloc into an even larger net exporter. On the partner front, the data illustrate a broad rebalancing — China and Türkiye deepened their role as the EU's main suppliers, while exports to the United States and other markets replaced the former Russian outlet almost entirely. These movements were accompanied by moderate import-source concentration and a notable price shock in Chinese imports in 2022. The industry's rising international integration, as captured by export-propensity and trade-intensity metrics, signals a mature and globally competitive sector that is likely to remain a strategic surplus generator for the EU.

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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.