Market evolution: Mineral processing machinery (CN 8474) — 2015–2025

Introduction

The EU remains the world's leading net exporter of mineral processing machinery, but the decade to 2025 reveals a profound structural shift: shrinking export volumes, soaring unit values, and a surge in low-cost imports from emerging economies. The data cover all trade between the EU and non-EU countries under heading 8474 — a broad grouping that spans crushing, grinding, sorting, mixing, agglomerating and moulding equipment for solid minerals, as well as parts thereof. The analysis that follows is based exclusively on the figures supplied by the Trade Dashboard for the period 2015–2025.

Premiumisation drives export value defence as shipped volumes plummet

The EU's export machine is shedding tonnage but moving up the value chain, a dynamic that explains the –15.6 % drop in export value alongside a much steeper –42.1 % fall in quantity. In 2015 the EU exported mineral machinery worth € 4.40 billion and 526 thousand tonnes; by 2025 those figures had fallen to € 3.72 billion and 305 thousand tonnes. The average export unit price consequently jumped by **+45.7 %**, from € 8 367 to € 12 190 per tonne.

Export unit prices rocket across all main product groups

Every major sub-heading shows a marked price uplift over the period. The most dramatic increase occurred in machinery for agglomerating, shaping or moulding (8474 80), where the export unit price rose by **+84.0 %** (from € 8 069 to € 14 846 per tonne). Crushing and grinding machines (8474 20) saw a **+29.6 %** increase, parts (8474 90) **+43.9 %**, and concrete or mortar mixers (8474 31) **+34.6 %**. Only sorting, screening and separating machines (8474 10) recorded a more modest rise of **+12.6 %**.

Product segment comparison illustrates that the composition of exports has remained broadly stable; therefore the price lifts are genuine value-per-tonne effects rather than a simple shift in the product mix.

Production value jumps despite a slight volume decline

EU-wide production data, although subject to partial estimation and rounding, confirms the same trend. Production volume fell from 674 thousand tonnes (2015) to 631 thousand tonnes (2024, latest available), a **–6.3 %** drop. Over the same period production value surged by **+63.1 %**, from € 2.30 billion to € 3.76 billion, driving the unit value of produced machinery from € 3 415 to € 5 949 per tonne.

Production volumes underline that the EU manufacturing base is concentrating on higher-specification equipment.

Export propensity reaches new heights

Despite the volume contraction, the EU's export propensity (exports as a share of domestic production) rose from **33.2 %** in 2015 to **60.3 %** in 2024, a **+67.1 %** increase.

Export propensity confirms that the sector has become significantly more outward-oriented, even as total physical output has stagnated.

Imports multiply from emerging markets, eroding the EU's surplus in lower-tech equipment

While the EU refined its export offering, non-EU suppliers flooded the market with competitively priced machinery, causing imports to almost double in value and rise sharply in quantity.

Import values nearly double, driven by India and Turkey

EU imports of CN 8474 goods climbed from € 673 million in 2015 to € 1 309 million in 2025, a **+94.4 %** increase. In volume terms, imports rose from 143 thousand tonnes to 256 thousand tonnes (**+78.8 %**), implying a modest **+8.7 %** increase in the average import price — a stark contrast to the export price trajectory.

The expansion was overwhelmingly carried by a handful of emerging partners:

Import source	2015 (€ m)	2025 (€ m)	Change (%)
China	138.3	355.9	+157.3
United Kingdom	202.8	337.4	+66.4
Türkiye	68.3	197.9	+189.7
India	31.9	142.5	+346.4
Norway	8.3	21.9	+163.1
Switzerland	69.5	64.2	–7.7

Top trading partners show that China, Türkiye and India together now account for the lion's share of the import bill.

All product segments experience deep import penetration

No product category was immune. Imports of concrete or mortar mixers (8474 31) soared from € 20.0 million to € 87.9 million (**+339.6 %**), bitumen mixing machines (8474 32) from € 7.6 million to € 39.4 million (**+416.7 %**), and even parts (8474 90) rose from € 351.7 million to € 558.2 million (**+58.7 %**). Crushing machines (8474 20) more than doubled, from € 106.2 million to € 300.0 million (**+182.6 %**).

Product segment comparison reveals that the import surge is broad-based and not confined to a single niche.

Trade surplus shrinks and import concentration edges up

The EU's extra-EU trade surplus contracted from € 3.73 billion to € 2.41 billion (**–35.4 %**). Meanwhile the Herfindahl-Hirschman Index (HHI) for imports increased from 1 639 to 1 829 (**+11.5 %**), indicating a moderately more concentrated supplier base.

Market concentration shows that while EU exports remain highly diversified (HHI still below 600), the import side is becoming less fragmented, with China and the UK jointly supplying more than half of EU imports.

The export geography is reshaped by sanctions and shifting demand poles

The destination map of EU mineral machinery has been redrawn by geopolitical shocks and the reorientation of global infrastructure spending.

US becomes the unchallenged top buyer as Russia collapses

Exports to the United States rose from € 457 million to € 659 million (**+44.1 %**), making it by far the largest single market. In contrast, shipments to the Russian Federation fell from € 336 million to just € 18 million (**–94.7 %**), essentially vanishing after 2022.

Export destination	2015 (€ m)	2025 (€ m)	Change (%)
United States	457.2	658.8	+44.1
Russian Federation	335.9	17.8*	–94.7
United Kingdom	191.1	256.4	+34.2
Algeria	298.1	73.2	–75.4
Türkiye	163.8	227.9	+39.1
China	197.7	134.0	–32.2
India	141.9	172.0	+21.2

*2024 figure; 2025 value not available.

Top trading partners illustrate a clear pivot: the EU is shipping more to advanced economies (US, UK) and near-neighbours (Türkiye), while volumes to former heavyweights China and Algeria have slumped.

High volatility and price shocks hit emerging export markets

Several developing-country markets experienced violent price perturbations. Exports to Argentina saw a **+48.0 %** price shift in 2020 on a volume that collapsed to a quarter of its baseline; Pakistan registered a **+255.1 %** price spike the same year; Côte d'Ivoire and Chile were hit by **+37.4 %** and **+34.4 %** price jumps, respectively, in 2023, each time accompanied by a sharp drop in shipped quantity.

Price shock events highlight that supply-demand imbalances or financing constraints in these markets have translated into abrupt unit-price spikes for EU exporters.

Export concentration rises but remains low; net export reliance deepens

The export HHI rose from 383 to 541 (**+41.5 %**), yet the figure remains very low, signalling that EU exporters still serve a wide array of countries. At the same time, the net import reliance indicator moved from –39.2 % to –79.0 %, meaning the EU's net export position relative to its own consumption more than doubled, even as the absolute surplus shrank.

Net import reliance and Market concentration together show a bloc that is more deeply enmeshed in global trade yet still holds a commanding net-export advantage.

Conclusion

Over the 2015–2025 period the EU's trade in mineral processing machinery underwent a dual transformation. On the export side, a deliberate shift toward high-value, high-technology equipment allowed the bloc to partially offset a massive volume contraction; average export prices have risen almost 46 %, and export propensity has doubled. On the import side, lower-cost producers — notably China, India and Türkiye — have aggressively gained market share, pushing imports up by 94 % and narrowing the trade surplus by a third. Geopolitics have completely reordered the destination map: the United States is now the dominant customer, while Russia and Algeria have virtually disappeared from the top ranks. The EU remains a resilient net exporter, but the growing import penetration and the reliance on a few high-volume partners suggest that the sector’s future competitiveness will depend on its ability to sustain the premiumisation trajectory while managing an increasingly concentrated import supply base.

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