Market evolution: Miscellaneous manufactured articles (CN 96) — 2015–2025

Introduction

The Harmonised System heading 96 covers a broad range of **miscellaneous manufactured articles** — from brooms, brushes, pens and pencils to lighters, zip fasteners, vacuum flasks, sanitary towels and toilet sprays. Between 2015 and 2025, EU-27 trade with non-EU countries in these everyday items has undergone a quiet but significant structural shift. While the overall value of exports edged slightly higher, imports surged, erasing most of the Union's trade surplus. Behind the headline numbers lie a sharp rise in sourcing concentration, a reorganisation of the main EU trading states, and noteworthy changes at the product level. This report describes and interprets the main trends using the full trade overview and detailed dashboard data.

1. The vanishing trade surplus: unstoppable import growth meets sluggish exports

Overall trade flows: exports inch up, imports surge and the surplus collapses

Over the 2015-2025 period, the value of EU exports of CN 96 goods rose by 9.5 %, from €5.23 billion to €5.73 billion. Over the same period, imports jumped by 44.5 %, from €3.75 billion to €5.43 billion. As a result, the EU's trade surplus in this category plummeted by 79.4 %, from €1.48 billion to only €0.30 billion. The widening gap is also reflected in physical volumes: export quantities fell by 8.2 % (from 738 thousand tonnes to 678 thousand tonnes), while import quantities climbed by 35.1 % (from 462 thousand tonnes to 624 thousand tonnes). Consequently, the average unit price of exports rose by 19.3 % and that of imports by 7.0 %, indicating that EU exporters are increasingly moving upmarket while cheaper imports are flooding in in larger quantities.

Indicator	2015	2025	Change (%)
Exports (€ bn)	5.23	5.73	+9.5
Imports (€ bn)	3.75	5.43	+44.5
Trade surplus (€ bn)	1.48	0.30	–79.4
Export quantity (thousand t)	738.3	678.0	–8.2
Import quantity (thousand t)	462.0	624.3	+35.1
Export unit price (€/t)	7 088	8 453	+19.3
Import unit price (€/t)	8 126	8 693	+7.0

Source: General Overview.

The China import wave reshapes EU supply

The single most powerful driver of the import surge is China. EU imports from China in CN 96 almost doubled over the decade, rising 95.8 % from €1.86 billion to €3.64 billion. China's share of total imports consequently grew, pushing the concentration HHI for imports from 2 799 to 4 687 (+67.5 %), a dramatic increase in supplier concentration. In volume terms, Chinese deliveries rose from 264 thousand tonnes to 482 thousand tonnes, with only moderate price increases, confirming the "more for less" pattern that outweighs the Union's own export growth.

Import origin	2015 (€ mn)	2025 (€ mn)	Change (%)
China	1 861	3 643	+95.8
United Kingdom	471	201	–57.4
Switzerland	274	332	+20.9
Türkiye	77	119	+55.0
United States	183	182	–0.6
Japan	267	254	–4.6
Viet Nam	61	80	+32.2

Source: Top Partners.

Export resilience anchored by the UK and the US, but overshadowed by a collapsing Russian market

On the export side, the United Kingdom remained the largest destination, with sales climbing 20.4 % to €1.34 billion. The United States (+25.7 %) and Switzerland (+28.7 %) also expanded steadily. However, exports to the Russian Federation shrank by 46.2 %, from €499 million to €269 million, mirroring the effect of EU sanctions and trade restrictions. Exports to Ukraine nevertheless grew by 27.3 %, highlighting a redirection of some trade flows within the neighbourhood. The high volatility of exports to Russia (coefficient of variation 0.46) and imports from the United Kingdom (CV 0.44) further underscores the disruptive roles of geopolitics and Brexit.

2. A shifting intra-EU landscape: Eastern producers rise as traditional exporters retrench

Export powerhouse Germany loses steam, while Czechia emerges as a new manufacturing hub

Germany remains the largest EU exporter of CN 96 goods, but its extra-EU exports fell by 5.8 % between 2015 and 2025, from €1.50 billion to €1.41 billion. France recorded an even sharper decline (–16.9 %). By contrast, Czechia's exports exploded by 164.1 %, from €171 million to €451 million, making it the fourth-largest EU exporter in this category. Poland (–21.0 %) lost ground, but Italy (+21.2 %), Belgium (+29.1 %) and the Netherlands (+25.0 %) all notched robust gains. This rebalancing shows a clear eastward shift in production and export capacity.

Top EU exporters	2015 (€ mn)	2025 (€ mn)	Change (%)
Germany	1 499	1 412	–5.8
France	705	586	–16.9
Italy	439	532	+21.2
Belgium	384	496	+29.1
Poland	467	369	–21.0
Netherlands	308	385	+25.0
Czechia	171	451	+164.1

Source: Top Reporters.

Import gateways shift: the Netherlands and Spain record explosive import growth

The same eastward and logistics-hub pattern is visible on the import side. The Netherlands more than doubled its extra-EU imports of CN 96 goods (+102.8 %, from €387 million to €785 million), while Spain saw a 74.6 % jump (to €528 million) and Poland +88.0 % (to €343 million). Germany's imports, though still the largest, grew by only 10.1 %. The numbers suggest that major seaports and logistics clusters in the Netherlands and Spain are increasingly serving as entry points for Chinese and Asian goods, which are then re-dispatched across the single market.

Specialisation patterns confirm Central Europe’s growing role

By 2025, revealed comparative advantage in CN 96 was highest in Czechia (RCA 2.22), Greece (1.75), Poland (1.57), Slovakia (1.34) and Sweden (1.20). All these countries recorded an RSCA above zero, indicating genuine specialisation. Germany’s RCA was virtually neutral (0.99), while service-oriented and pharma-heavy economies such as Ireland (0.15), Luxembourg (0.08) and Malta (0.02) remained at the bottom. This map underlines how central and south-eastern European manufacturing hubs are capturing a disproportionate share of the sector’s export growth.

3. From pens to vacuum flasks: the product mix reveals diverging fortunes

Import surge in vacuum flasks drives up non-EU reliance

The most dramatic product-level story on the import side concerns vacuum flasks and other vacuum vessels (CN 9617). Their import value surged from €125 million in 2015 to €525 million in 2025 (+320 %), with quantities more than tripling from 16 thousand tonnes to 54 thousand tonnes. This segment alone accounted for a significant share of the overall import value gain and illustrates the EU’s growing dependence on external suppliers for thermal containers, largely produced in Asia.

Main import product segments	2015 (€ mn)	2025 (€ mn)	2015 qty (t)	2025 qty (t)
9603 Brooms & brushes	1 058	1 631	138 401	207 590
9608 Pens & markers	662	835	45 263	79 744
9619 Sanitary towels	382	402	102 608	93 084
9617 Vacuum flasks	125	525	16 123	54 162
9613 Lighters	191	181	25 332	26 107

Source: Product Segment Breakdown.

Brooms and brushes: strong two-way trade growth but diverging unit values

Brooms and brushes (CN 9603) are the largest segment in both exports and imports. Exports grew by 37.9 % in value (€754 million to €1 040 million) while import value rose 54.1 % (€1 058 million to €1 631 million). Crucially, export unit prices climbed from €13 890/t to €20 273/t (+46 %), far outstripping the import price increase from €7 646/t to €7 855/t (+2.7 %). The EU thus seems to export higher-quality, higher-value brushes while importing large volumes of commodity-grade products, with a widening price-quality gap that supports the surplus in this sub-sector.

Writing instruments and lighters: EU exports decline while imports advance

Pens and markers (CN 9608) tell a different story. EU exports shrank from €690 million to €583 million (–15.5 %), while imports rose from €662 million to €835 million (+26.1 %). The quantity of exported pens dropped from 23.7 thousand tonnes to 18.6 thousand tonnes, whereas imports jumped from 45.3 thousand tonnes to 79.7 thousand tonnes. Unit values for imports actually fell by 28.4 %, hinting at a flood of cheap pens, while export unit values rose slightly. Similarly, cigarette lighter exports (CN 9613) declined by 5.6 % in value, with very modest volume recovery. Scent sprays and toilet sprays (CN 9616) were particularly hard hit on the export side, losing 31.4 % of their value as quantities dropped sharply. These segments epitomise the competitive pressure from low-cost producers on traditional EU industries.

Conclusion

Over the decade to 2025, the EU's trade in miscellaneous manufactured articles has moved from a comfortable surplus to near-balance, driven by a dramatic rise in imports — above all from China — that far outpaced export growth. The Union's import base has become dangerously concentrated, while exports are increasingly sustained by the UK, the US and Switzerland, partially offsetting the loss of the Russian market. Inside the EU, the production geography has shifted eastwards, with Czechia and other central European states capturing comparative advantage, while traditional exporters such as Germany and France have ceded ground. At the product level, vacuum flasks symbolise the new import dependency, brooms and brushes illustrate a successful high-value export niche, and pens and lighters highlight the erosion of once-stable EU manufacturing. These dynamics underline both the need to diversify supply sources and the competitive challenges confronting Europe's lighter manufacturing segments.

Generated on 2026-07-24 based on data from tradedashboard.eu

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.