Market evolution: Musical instruments and accessories (CN 92) — 2015–2025

Introduction

The European Union's trade in musical instruments and accessories (CN code 92) with non-EU countries from 2015 to 2025 underwent a profound transformation. While the total value of both exports and imports rose, the underlying volume and price dynamics diverged sharply, pointing to a market in the throes of premiumisation, post-Brexit realignment, and heightened external dependency. This report examines the main trends, shocks, and structural shifts using the official EU trade overview data, together with detailed product, partner, and vulnerability indicators.

1. The Premiumisation of EU Musical Instrument Trade: Value Growth Despite Volume Contraction

Between 2015 and 2025, EU exports of musical instruments shrank by 29.7% in volume, yet export value increased by 13.0%, propelled by a 60.6% rise in average unit prices.

The headline figures for extra-EU exports capture a striking decoupling: export volumes fell from 14 164 tonnes to 9 963 tonnes, while value rose from €702.8 million to €794.3 million (trade dynamics). Consequently, the average export price soared from €49 619 per unit (tonne) to €79 703, a 60.6% increase. This indicates that EU exporters moved decisively upmarket, shipping fewer but much more valuable instruments.

Import growth was more balanced, but a 40.2% price shock on Chinese instruments in 2022 fundamentally altered the cost landscape.

Imports tell a different story. Import value climbed 32.4%, from €969.8 million to €1 284.2 million, while volume rose 20.4% (from 53 657 to 64 581 tonnes), yielding a modest 10.0% rise in average import prices. However, beneath the surface, a sharp price shock occurred: in 2022, unit prices of Chinese imports surged by 40.2%, pushing the average price to €17 471 per tonne, well above the pre-shock baseline of €12 461 (shock events). This event, combined with a similar 56.8% price shift from Indonesia in 2021, helped lift the overall import price level, albeit temporarily.

At the product level, electric instruments and parts dominate both import and export baskets, while acoustic string and wind instruments exhibit the highest price tiers in exports.

The product segment breakdown reveals a clear hierarchy. On the import side, electric instruments (9207) accounted for the largest value (€594 million in 2025), followed by parts and accessories (9209, €227 million). In exports, parts and accessories (€212 million) and electric instruments (€202 million) led, but wind instruments (9205) at €123 million and acoustic string instruments (9202) at €81 million command exceptionally high unit prices: in 2025 the export price per tonne reached €249 053 for wind instruments and €149 613 for string instruments, compared to only €63 105 for electric instruments. This underscores the EU's competitive advantage in high-value, artisanally crafted acoustic instruments.

2. Geopolitical Reshuffling: Brexit, US Demand, and the Relocation of Supply Chains

The UK's exit from the EU single market led to a 23.3% drop in EU exports to the UK, and an even steeper volume collapse, as trade flows adjusted dramatically from 2021 onward.

The United Kingdom was historically the EU's largest export market, but exports fell from €154.4 million in 2015 to €118.5 million in 2025 (−23.3%) (top partners). Volume figures are even more dramatic: export quantity to the UK collapsed from 4 385 tonnes in 2015 to 1 809 tonnes in 2025, with an abrupt break in 2021 when the UK left the customs union. That year, the average export price to the UK spiked by 290%, reflecting the sudden imposition of customs frictions and a shift to higher-value shipments. UK imports to the EU also tumbled by 40.5% (€48.9 million to €29.1 million), and the quantity imported from the UK fell from 2 408 tonnes to a mere 274 tonnes.

The United States emerged as the top export market, with exports growing 42.7% to €212.9 million, while Switzerland, Norway, and Türkiye also recorded strong gains.

The US overtook the UK as the premier destination for EU musical instruments. Exports to the United States rose from €149.2 million to €212.9 million (+42.7%), driven by steady demand and a stable unit price trend. Other markets also flourished: exports to Switzerland climbed 44.9% (to €76.7 million), to Norway by 46.4% (€30.3 million), and to Türkiye by 92.4% (€20.8 million). These gains helped offset the UK loss and diversified the EU's export footprint.

On the import side, China reinforced its position as the dominant supplier, and Malaysia surged from a marginal player to a €37.2 million source.

China's share of extra-EU imports remained paramount, rising from €340.6 million in 2015 to €494.1 million in 2025 (+45.1%). The country's supply was subject to the 2022 price shock but volumes quickly recovered to 35 719 tonnes in 2025. The most spectacular growth, however, was from Malaysia, which went from merely €1.9 million in 2015 to €37.2 million in 2025, an increase of 1,870%. This surge reflects the relocation of some mass-market production (notably electric guitars and related instruments) away from China. Other Asian suppliers, such as Taiwan (+18.4%) and Indonesia (+37.0%), also gained ground, while the United Kingdom's role as an import source shrank drastically.

Within the EU, Germany and Sweden markedly increased their export specialisation, while the Netherlands' re-export role contracted sharply.

The intra-EU distribution of exports shifted. Germany, the unrivalled leader, grew its extra-EU exports by 19.6% to €326.4 million. Sweden recorded a spectacular 151.6% surge (from €29.5 million to €74.2 million), moving it into the top tier of EU exporters. In contrast, the Netherlands saw its exports to non-EU countries plummet by 47.6% (to €56.6 million), suggesting a reduced function as a logistics and re-export hub. The specialisation map for 2025 shows Germany with an RSCA of 0.3189, followed by France (0.1615) and the Netherlands (0.153), while many eastern and southern member states remain much less specialised.

3. From Resilience to Reliance: The EU's Growing External Dependency in Musical Instruments

Net import reliance surged from 10.8% in the early 2000s to 28.9% in 2024, indicating a structural reliance on non-EU countries for a sector with high cultural and economic significance.

The net import reliance indicator measures the share of apparent EU consumption that is met by imports from outside the bloc. It rose from 10.8% (2003) to 28.9% in 2024. Even within the 2015-2025 window, it increased from about 25.6% in 2018 to 28.9% in 2024, peaking at 35.3% in 2020. This growing dependence signals that EU demand for musical instruments is increasingly satisfied by non-EU manufacturers, especially in the entry-level and mid-range segments.

EU production of musical instruments collapsed by 65.4% in volume over the past two decades, while production value rose by 16.1%, signalling a shift toward fewer, higher-value instruments and parts.

EU production volumes fell from 9.39 million units in the early 2000s to 3.25 million units in 2024, a decline of 65.4%. Yet the production value increased from €855.1 million to €993.2 million over the same period (+16.1%). The implied unit value of domestic production thus rose dramatically—from about €91 per unit to €306 per unit—confirming that EU manufacturers have abandoned mass production of low-cost instruments in favour of high-end instruments and specialised parts. This trend aligns with the export price premiumisation observed earlier.

Export propensity reached 84.1% in 2024, meaning that the vast majority of EU-made musical instruments are sold outside the bloc, exposing the industry to global demand volatility.

The export propensity (exports as a share of production) climbed from 57.1% (2003) to 84.1% in 2024. Such a high ratio demonstrates that EU production is overwhelmingly geared toward foreign markets. While this reflects competitiveness, it also makes the sector highly sensitive to external shocks—be it US tariff policies, Brexit disruptions, or global economic downturns.

Price shocks from China (2022) and Indonesia (2021) on the import side, and the UK (2021) on the export side, underscore the sector’s vulnerability to abrupt supply and trade policy changes.

The shock detection analysis identifies several abrupt price events. On the import side, China’s unit price jumped 40.2% in 2022, while Indonesia’s rose 56.8% in 2021, both with high abnormality scores. On the export side, the Brexit transition caused a 290% price surge for shipments to the UK in 2021, as customs barriers replaced seamless trade. The high volatility of trade with the UK (CV of 0.84 for exports) and with Hong Kong (CV 0.97) further illustrates the sector’s exposure to policy and logistical disruptions.

Conclusion

EU trade in musical instruments and accessories over the decade 2015–2025 is a story of value-driven growth and structural transformation. Exports became more expensive and exclusive, reflecting the EU’s strength in high-end acoustic instruments and parts, while imports—dominated by China and a fast-growing Malaysia—supplied the mass market. The UK’s departure from the single market reconfigured the trade map, with the US be-

coming the foremost export destination and intra-EU specialisation deepening. However, the sharp rise in net import reliance and the near-complete export orientation of EU production highlight strategic vulnerabilities. A concentrated supply base, coupled with a high propensity to export, means that future disruptions—whether geopolitical, logistical, or tariff-related—could have amplified effects on this culturally and economically significant sector.

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