Market evolution: Packaging machinery (CN 8422) — 2015–2025

Introduction

EU trade in packaging machinery (heading 8422)—a broad category covering dishwashing machines, bottle-cleaning, filling, sealing, labelling, wrapping, and their parts—experienced a decade of structural change between 2015 and 2025. The data, drawn from the EU trade dashboard, show a marked expansion in export values and a widening trade surplus, driven almost entirely by rising unit prices rather than physical volumes. At the same time, the geographical orientation of both exports and imports shifted significantly, while export concentration and specialisation among member states intensified.

1. A value-led export expansion masks stagnant volumes

EU export value grows by more than a third, while quantities barely move

Between 2015 and 2025 the total value of EU exports rose from €10.06 billion to €13.55 billion (+34.7 %). In stark contrast, the exported quantity in tonnes declined slightly (–0.3 %), from about 317 500 t to 316 500 t. Consequently, the average export unit price climbed by 35.1 % (from €31 679/t to €42 801/t). This decoupling underscores that the sector’s revenue growth was driven by higher unit values—likely reflecting a shift toward more sophisticated, higher-priced machinery—rather than by selling larger volumes.

Import growth is volume-driven, while import prices stay flat

Imports present a mirror image: value grew by 63.2 % (from €1.59 billion to €2.59 billion), but this was almost entirely the result of a 62.8 % increase in imported quantity (from 151 743 t to 246 994 t). The average import price rose only 0.3 %, remaining essentially constant at about €10 450/t. Thus, the EU absorbed much larger volumes of lower-valued or competitively priced machinery from abroad.

The trade surplus widens despite the import surge

Because the export base is far larger than imports, the extra-EU trade balance in packaging machinery strengthened substantially. The surplus grew from €8.47 billion in 2015 to

€10.96 billion in 2025 (+29.3 %). The EU's net export position was therefore reinforced, even as imports increased rapidly in relative terms.

Indicator	2015	2025	Change (%)
Exports (€ billion)	10.06	13.55	+34.7
Exports (t)	317 522	316 512	–0.3
Export price (€/t)	31 679	42 801	+35.1
Imports (€ billion)	1.59	2.59	+63.2
Imports (t)	151 743	246 994	+62.8
Import price (€/t)	10 450	10 480	+0.3
Trade balance (€ billion)	8.47	10.96	+29.3

Source: General trade overview.

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2. A profound reorientation of trade partners

Exports pivot toward the United States, away from Russia and China

The destination of EU exports changed dramatically over the decade. Shipments to the United States more than doubled, rising 110.6 % to €3.35 billion, making the US the largest single market. In contrast, exports to the Russian Federation plummeted by 43.5 % (from €520 million to €293 million) and exports to China contracted by 34.4 % (from €927 million to €608 million). The United Kingdom remained a stable outlet, growing 29.2 % to €1.01 billion, while other destinations such as Australia and Switzerland posted moderate gains. These shifts are clearly visible in the top export partners dataset.

Import sourcing diversifies towards China, Türkiye, and Korea

On the import side, the EU rapidly diversified its mix of suppliers. Chinese deliveries soared by 147.8 % to €802 million, while imports from Türkiye rose 113.4 % to €478 million and those from Korea surged 218.4 % to €56 million. Traditional sources such as Switzerland and the United Kingdom saw much more modest changes, with UK imports actually edging down (–5.0 %). This pattern points to a broadening of the EU's import base, with lower-cost Asian and neighbouring emerging partners gaining share.

Export market concentration increases markedly

The Herfindahl–Hirschman index for extra-EU exports rose from 541 to 822 (+51.7 %), indicating that export flows became more concentrated on a smaller number of large markets—primarily the United States, the United Kingdom, and a few others—while the share of smaller, more diversified destinations declined.

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3. Deepening specialisation and rising concentration among EU producers

Italy and Germany dominate an increasingly concentrated export landscape

In 2025, EU member state specialisation reveals a clear hierarchy. Italy was the most specialised (RSCA 0.53, RCA 3.27), followed by Slovenia, Germany, Poland, and Sweden—all registering positive RSCA values. Together, Germany and Italy alone accounted for over 57 % of total EU extra-EU exports. The export Herfindahl–Hirschman index for member-state concentration also rose by 51.7 %, underscoring that the growth in exports was distributed unequally, favouring the already dominant producers.

Domestic production value surges, again led by price

EU production data mirror the trade patterns. The value of domestic output of packaging machinery jumped by 74.5 % between 2015 and 2024 (the latest available year), from €18.2 billion to €24.0 billion, while the quantity produced actually dipped slightly (–1.6 %). The implied unit production price nearly doubled, from around €1 828/t to €2 722/t, confirming that value creation in the sector is being driven by higher unit prices rather than by expanding physical output. Detailed production figures are available in the production volumes dashboard.

The EU’s net import reliance becomes even more negative

The net import reliance ratio deepened from –52 % in 2015 to –84 % in 2025. This very negative value means the EU produces far more than it consumes of these goods and is a pivotal global supplier, with the surplus growing relative to domestic consumption. Combined with the rising trade intensity (from 43 % to 60 %) and export propensity (from 40 % to 56 %), the sector has become more deeply enmeshed in global trade while strengthening its net exporter status.

Price shocks highlight temporary disruptions, not structural breaks

Isolated price shocks were detected in exports to India (2020, +38.5 % price spike), Israel (2023, +32.8 %), and Japan (2023, +39.7 %), as recorded in the shock events dashboard. However, these events were short-lived and did not alter the overarching trend of stable export pricing; the overall export unit price continued its steady upward trajectory. Quantity volatility, as measured by the coefficient of variation, was highest for imports from Korea (CV 0.79), the United Kingdom (0.62), and Thailand (0.48), but remained moderate for the main partners, suggesting that the bulk of trade flows were not excessively erratic.

Conclusion

The 2015-2025 period reconfigured EU trade in packaging machinery around three durable trends. Export growth was overwhelmingly value-led, powered by higher unit prices, while import expansion was volume-driven with flat prices; the result was a markedly larger trade surplus. Geopolitical forces redirected exports sharply toward the United States and away from Russia and China, while imports diversified rapidly toward Asian and neighbouring suppliers. Inside the EU, production concentrated further among a handful of highly specialised member states—most notably Italy and Germany—and domestic output became ever more price-intensive. The sector’s deep negative net import reliance and rising trade intensity confirm that EU packaging machinery remains a globally integrated, high-value export powerhouse.

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