

Market evolution: Parts for electronic display and communication apparatus (CN 8529) — 2015–2025

Introduction

CN 8529 covers parts for an array of electronic display and communication devices – from flat panel modules and radio-telephony sets to radar and television cameras. Over the decade 2015–2025, EU extra-EU trade in these components underwent a profound transformation. While the total export value remained remarkably resilient, the physical volume of goods shipped collapsed, signalling a decisive shift towards higher-value, technologically advanced items. On the import side, the value of purchases fell by a third, largely driven by the restructuring of supplier relationships. This report, based exclusively on the dashboard data, dissects three interlocking dynamics: the decoupling of value from volume, the geopolitical re-routing of supply chains, and the growing divergence among EU Member States.

1. The Great Price Shift: From bulk freight to high-value components

The most striking feature of the decade is the explosion of unit prices, especially on the export side. This section explains how trade values became increasingly disconnected from the tonnages shipped.

Export unit values more than tripled while physical shipments shrank by two-thirds

Extra-EU exports of CN 8529 rose from EUR 2.67 billion (2015) to EUR 2.92 billion (2025), a modest gain of **9.2 %**. Over the same period, export **quantities** dropped from 50 979 tonnes to 15 834 tonnes, a fall of **-68.9 %**. Consequently, the average export price per tonne soared from EUR 52 417 to EUR 184 191, an increase of **+251.4 %**.^[^1] This decoupling shows that the EU progressively exported fewer, but far more sophisticated and higher-priced parts.

Import prices followed a split trajectory: aerals became the cost driver while “other parts” became cheaper

On the import side, the aggregate price per tonne decreased from EUR 37 633 to EUR 33 650 (-10.6 %).^[^1] However, this masks a sharp divergence between the two sub-headings. As shown in the subcategory breakdown,^[^2] the price of aerals and reflectors (852910) jumped from EUR 34 441/t to EUR 88 763/t (+157.8 %), whereas the far larger “other parts” segment (852990) saw a price decline from EUR 37 883/t to EUR 29 702/t (-21.6 %). The rising cost of imported aerals absorbed much of the import price pressure.

Flow	Subcategory	2015 price (EUR /t)	2025 price (EUR /t)	Change
Exports	852990 Other parts	74 302	247 994	+233.7 %
Exports	852910 Aerals	22 604	118 249	+423.0 %
Imports	852990 Other parts	37 883	29 702	-21.6 %
Imports	852910 Aerals	34 441	88 763	+157.8 %

Source: Subcategory breakdown

Abrupt price shocks in key export markets underscored the volatility of high-value trade

The dashboard’s shock detection algorithm flagged extreme price anomalies for several export destinations.^[^3] For instance, export prices to **India** surged by **416.5 %** in 2020 (abnormality score 22.0) while volume halved. A similar pattern hit **Brazil** (price +335.3 %), **Egypt** (+546.3 % in 2022), and **Türkiye** (+45.2 % in 2020). These events reflect abrupt shifts in the product mix or emergency procurement of critical parts, amplifying the overall trend toward higher unit values.

2. Geopolitical Winds: China, Viet Nam, and the sanctions effect redraw the trade map

The geography of EU trade in CN 8529 changed radically. Traditional suppliers lost ground, a former import giant became the top export market, and sanctions erased a once-dominant flow.

China pivoted from dominant import source to the EU’s number-one export destination

In 2015 China supplied extras-EU imports worth EUR 4.27 billion; by 2025 that figure had fallen to EUR 2.91 billion (-31.7 %). Over the same period, EU exports to China grew from EUR 0.19 billion to EUR 0.67 billion, an increase of **+261.5 %**, making China the top ex-

tra-EU market for EU parts.[^4] This two-way rebalancing indicates that China is no longer just a low-cost assembly base for EU firms but is increasingly absorbing higher-value European components.

Viet Nam's meteoric rise reshaped import supply chains, displacing Korea, Malaysia and Taiwan

Imports from **Viet Nam** rose from EUR 10.9 million (2015) to a peak of EUR 2.21 billion in 2021, before settling at EUR 360 million in 2025 – an overall gain of **+3 217 %**.[^4] Viet Nam's emergence as a major electronics manufacturing hub came at the expense of traditional Asian suppliers:

- **Korea, Republic of:** imports fell from EUR 1.26 billion to EUR 0.16 billion (**-87.2 %**).
- **Malaysia:** imports fell from EUR 0.37 billion to EUR 0.05 billion (**-87.0 %**).
- **Taiwan:** imports fell from EUR 0.60 billion to EUR 0.22 billion (**-62.6 %**).

The data show a sweeping relocation of parts sourcing towards Viet Nam, though the extreme volatility of those flows (coefficient of variation 1.18 for quantities)[^5] reflects the rapid ramp-up and subsequent adjustment of supply chains.

Sanctions erased Russia as a market; the UK and US remained stable but structurally different

At the start of the period, **Russia** was the EU's largest extra-EU export market, absorbing EUR 0.42 billion in 2015. Following the 2014/2022 sanctions regimes, exports collapsed to just EUR 32 420 in 2025, a decline of essentially **-100 %**.[^4] Meanwhile, shipments to the **United States** grew from EUR 0.36 billion to EUR 0.50 billion (+38.7 %) and to the **United Kingdom** from EUR 0.26 billion to EUR 0.34 billion (+31.3 %). These two advanced markets absorbed higher-value parts and partially offset the loss of the Russian market.

3. Intra-EU Asymmetries: From manufacturing hubs to specialised technology clusters

The aggregate trade figures hide a dramatic redistribution of activity among Member States. Import dependence migrated eastward to Poland, while Germany consolidated its export powerhouse position and some smaller economies carved out extreme specialisations.

Poland took over the import-dominance role as Germany, Slovakia and Hungary retreated

Poland replaced Germany as the Member State with the highest extra-EU imports of CN 8529. Poland's imports remained broadly stable at EUR 1.76 billion in 2025 (-4.3 % from 2015), whereas **Germany's** imports shrank from EUR 1.72 billion to EUR 0.75 billion (-56.6 %). Even sharper declines occurred in Central Europe: **Slovakia's** imports plummeted from EUR 0.96 billion to EUR 0.08 billion (-91.2 %), **Hungary's** from EUR 1.30 billion to EUR 0.27 billion (-79.3 %), and **Czechia's** from EUR 0.50 billion to EUR 0.15 billion (-69.1 %).^[6] These numbers suggest that the region's role as an assembly hub for imported electronic parts eroded significantly, possibly due to a shift of final assembly closer to end markets or back to Asia.

German exports boomed, while Sweden and Portugal rose as specialised technology exporters

On the export side, **Germany** almost tripled its extra-EU sales, from EUR 0.51 billion (2015) to EUR 1.23 billion (2025), a gain of +141.6 %.^[6] **Sweden** nearly doubled its exports (to EUR 0.20 billion, +91.4 %), and **Italy** posted a more modest rise (+26.6 %). In contrast, **Poland's** extra-EU exports collapsed from EUR 0.31 billion to EUR 0.04 billion (-87.4 %), mirroring its transition to an import-intensive role.

Specialisation indicators for 2025 reveal extraordinary concentration in a few small Member States:^[7]

Member State	RSCA	RCA
Portugal	0.86	13.6
Slovenia	0.37	2.19
Bulgaria	0.25	1.67
Romania	0.19	1.48
Netherlands	0.15	1.35

Portugal's revealed comparative advantage of 13.6 means that CN 8529 represents an exceptionally high share of its total extra-EU exports, highlighting a deep niche in electronic parts.

Concentration trends reflect a tighter import basket and a slightly more focused export base

The Herfindahl-Hirschman Index (HHI) for extra-EU imports rose from 3 180 to 3 437 (+8.1 %), signalling that imports became more concentrated among a few key partners, notably China and Viet Nam.^[8] On the export side, the HHI increased from 760 to 1 081

(+42.2 %), although the absolute level remained moderate. Interestingly, import volume concentration surged from 4 053 to 6 749 (+66.5 %), confirming that even within a smaller import quantity, the reliance on a few high-volume suppliers intensified.

Conclusion

The EU's extra-EU trade in electronic equipment parts (CN 8529) from 2015 to 2025 underwent a dual structural shift. First, the business moved decisively away from bulk, low-margin trade: export unit prices more than tripled while quantities plummeted, and import prices displayed a stark subcategory split, with aerials becoming a cost driver. Second, geopolitics and production relocation redrew the trade map. China emerged as the EU's top export market even as Viet Nam surged as a critical import supplier, while sanctions erased the Russian market. Within the EU, the centre of gravity shifted from Central European assembly hubs to a German-led export engine and a few highly specialised small economies. Together, these dynamics paint a picture of an industry that has moved up the value chain, diversified its partnerships, and concentrated its expertise in fewer, more technology-intensive players.

[^1]: EU trade in CN 8529 – Overview [^2]: Subcategory breakdown [^3]: Price shock events [^4]: Top trading partners [^5]: Trade volatility [^6]: Top reporting Member States [^7]: Specialisation profile (2025) [^8]: Market concentration

Generated on 2026-07-28 based on data from tradedashboard.eu

Auto-generated report: it accelerates, and sometimes misleads, human analysis. It cannot replace it in full.

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](#).