EU TRADE EXPLORER

Market evolution: Photographic and cinematographic goods (CN 37) — 2015–2025

Introduction

This report analyses the European Union's extra-EU trade in photographic and cinematographic goods (CN code 37), covering the eleven calendar years from 2015 to 2025. The product grouping spans unexposed plates, film, paper, and textiles, as well as exposed but undeveloped or developed media and associated chemical preparations (see Scope & Definitions). Over the period the EU's net trade position turned from a comfortable surplus into a significant deficit. This reversal was driven by a powerful double trend: a collapse in the physical volumes of EU exports, even as unit prices rose sharply, and a volume-led surge in imports of high-value exposed and developed photographic media. Partner-country patterns were reshaped by Brexit, the impact of sanctions on Russia, and a strong pivot towards suppliers in North America and Asia. Within the EU, the geography of trade changed dramatically, with Ireland emerging as the dominant extra-EU import hub while traditional large exporters such as Belgium and Germany retained their specialisation.

The vanishing surplus: how soaring imports of developed photographic media overturned the EU's net trade position

Export volumes shrank by two-fifths while the average export price surged by nearly 47 %

Between 2015 and 2025 the total value of EU exports of CN 37 goods fell by 11.1 %, from €1 556.9 million to €1 384.3 million. The quantity exported contracted much more sharply, from 142 058.7 tonnes to only 86 059.4 tonnes (−39.4 %), while the average export price jumped by 46.8 % (from €10 958 to €16 083 per tonne). This indicates a structural shift towards higher-value, lower-bulk shipments. The detailed product breakdown (see the product comparison dashboard) confirms that the weight of unexposed flat film and plates (CN 3701) – the largest volume segment – dropped from 54 248 tonnes to 40 161 tonnes, and exports of chemical preparations (CN 3707) halved in tonnage. In contrast, the value of exports of exposed and developed media (CN 3705) – the highest unit-price category – more than tripled from €83.4 million to €279.0 million, even though the tonnage fell from 783 tonnes to 443 tonnes, reflecting a six-fold rise in the unit price of those exports.

Import growth was spearheaded by the exposed and developed segment (CN 3705), whose value multiplied five-fold

On the import side, the total value expanded by 39.8 % to reach €1 483.5 million in 2025. Import quantities rose even faster (+45.6 %), while the average import price edged down by 4.0 %, from €19 492 to €18 714 per tonne. The main engine of this expansion was the exposed and developed photographic plates and film category (CN 3705). Its import value rocketed from €109.8 million in 2015 to €562.3 million in 2025, a more than five-fold increase. Meanwhile, imports of unexposed flat film (CN 3701) almost doubled (from €236.4 million to €449.6 million), while imports of chemical preparations (CN 3707) – historically the largest import category – shrank from €573.0 million to €398.9 million.

The combined effect pushed the overall trade balance from a surplus of €496 million to a deficit of €99 million

The stylised evolution of the trade balance illustrates the tipping point:

- In 2015, large export surpluses in unexposed flat film (CN 3701, +€414 million) and unexposed roll film (CN 3702, +€232 million) more than compensated deficits in chemicals (CN 3707, –€137 million) and exposed developed goods (CN 3705, –€26 million), yielding an overall surplus of €496 million.
- By 2025, the surplus in CN 3701 had shrunk to €143 million, the surplus in CN 3702 had fallen to €54 million, and the deficit in CN 3705 had ballooned to –€283 million. Combined with a still negative balance in chemicals (–€125 million), the total extra-EU balance swung to a deficit of –€99 million, a deterioration of 120 % from the start of the period. The headline trade data are summarised in the overview dashboard.

Indicator (EU extra-EU)	2015	2025	Change
Export value (€ m)	1 556.9	1 384.3	–11.1 %
Export quantity (tonnes)	142 058.7	86 059.4	–39.4 %
Export average price (€/tonne)	10 958	16 083	+46.8 %
Import value (€ m)	1 061.3	1 483.5	+39.8 %
Import quantity (tonnes)	54 442.4	79 259.3	+45.6 %
Import average price (€/tonne)	19 492	18 714	–4.0 %
Trade balance (€ m)	+495.6	–99.1	–120 %

Realigning partners: Brexit, sanctions, and the pivot to North America and Asia

The United Kingdom’s role collapsed on both export and import sides after 2019

The most dramatic shift among trading partners concerns the United Kingdom. In 2015 the UK was the EU’s second-largest export destination (€291.8 million) and the largest import source (€385.7 million). By 2025 exports to the UK had fallen to €111.7 million (–61.7 %) and imports from the UK to only €45.5 million (–88.2 %), a collapse that accelerated markedly after 2019 and reflects the post-Brexit reclassification of UK trade as extra-EU and the associated disruptions. A further notable shock is visible in the import price from the UK, which jumped by 73.2 % in 2017 – a one-off event likely linked to a change in the product mix or supplier shifts (see shock detection).

Exports to Russia plummeted by more than 70 % following sanctions and trade restrictions

EU exports to the Russian Federation decreased from €76.2 million in 2015 to €21.7 million in 2025 (–71.5 %). The drop was especially steep after 2021, coinciding with the tightening of trade sanctions. Among major export destinations, Russia shows the highest volatility of quantity, with a coefficient of variation of 0.564, reflecting the abruptness of the trade contraction (see volatility dashboard).

The United States and China became the predominant import partners, while export relations remained more diversified

The vacuum left by the UK on the import side was filled mainly by the United States and China. Imports from the United States more than doubled, from €304.5 million to €743.4 million (+144.1 %), making the US the largest extra-EU supplier by far. Imports from China shot from €40.2 million to €261.3 million (+549.8 %), surpassing Japan to become the second-largest import partner. Japan’s imports rose more moderately to €400.8 million (+43.5 %). On the export side, the rebalancing was milder: the US remained the top destination (€396.0 million, +27.3 %), while China rose to become the second-most important export market (€99.8 million, +84.2 %). Overall, the concentration of extra-EU imports, as measured by the Herfindahl-Hirschman Index (HHI), increased from 2 854 to 3 565 (+24.9 %), reflecting greater reliance on a handful of large partners. Export concentration also rose, from 890 to 1 069 (+20.1 %), but remains moderate (see concentration dashboard). The top partner dynamics are displayed in the partners overview.

Partner	Import value 2015 (€ m)	Import value 2025 (€ m)	Import change	Export value 2015 (€ m)	Export value 2025 (€ m)	Export change
United States	304.5	743.4	+144.1 %	311.0	396.0	+27.3 %
China	40.2	261.3	+549.8 %	54.2	99.8	+84.2 %
Japan	279.3	400.8	+43.5 %	28.7	45.1	+57.3 %
United Kingdom	385.7	45.5	–88.2 %	291.8	111.7	–61.7 %
Russian Federation	–	–	–	76.2	21.7	–71.5 %

Diverging national hubs: Ireland’s import surge and the enduring specialisation of Belgium and the Netherlands

Ireland became the EU’s largest extra-EU import gateway for photographic goods, while Dutch and German imports stagnated or declined

Among the EU Member States, the most striking development is the explosion of imports recorded by Ireland. Irish extra-EU purchases of CN 37 goods rose from €123.7 million in 2015 to €474.9 million in 2025, a 283.9 % increase that propelled Ireland to the top importer position. This surge was overwhelmingly driven by the exposed and developed segment (CN 3705), in which Ireland’s imports reached a level comparable to the entire EU total. By contrast, the Netherlands – the top importer in 2015 – saw its imports shrink from €406.2 million to €272.4 million (–33.0 %), and Germany’s imports drifted slightly lower (–9.9 %). Belgium more than doubled its imports (to €151.5 million, +135.5 %), while Spain (+104.0 %) and France (+30.9 %) also recorded sizeable increases. The evolution of Member State trade is detailed in the reporters dashboard.

Export leadership remained concentrated in Belgium, Germany and the Netherlands, though all three saw their export values decline

On the export side, the traditional heavyweights retained their ranks but posted lower values. Belgium remained the largest extra-EU exporter, yet its exports fell from €561.9 million to €396.5 million (–29.4 %). Germany’s exports eased slightly to €434.5 million (–4.3 %), while the Netherlands experienced a steeper drop to €245.2 million (–37.3 %). These declines were largely due to the shrinking volumes of unexposed film and chemical preparations. Meanwhile, some smaller exporters grew: Spain moved from €20.5 million to €33.6 million (+64.0 %), Italy from €19.4 million to €24.2 million (+25.0 %), and Ireland – despite its import dominance – recorded a modest export value of €11.6 million.

Specialisation patterns capture a deeply polarised EU market

Revealed symmetric comparative advantage (RSCA) indices for 2025, available on the specialisation dashboard, underline the dualistic nature of the EU market.

- Belgium (RSCA 0.36), the Netherlands (0.31) and Germany (0.18) are the most specialised exporters, closely followed by Hungary (0.05) and France (0.01). These five countries together account for the bulk of EU extra-EU exports of photographic goods.
- At the opposite end, large eastern and northern economies such as Bulgaria, Cyprus, Finland, Denmark and Estonia exhibit RSCA values below –0.90, indicating virtually no export specialisation in this product group.

The import-side HHI by volume surged from 2 599 to 5 613 (+116 %) between 2015 and 2025, confirming that a few Member States – above all Ireland – now absorb the lion's share of extra-EU photographic imports. The export-side volume HHI remained broadly stable (from 752 to 800), implying that the export base has not become meaningfully more concentrated at the Member State level, even though individual national exporters have undergone substantial shifts.

Conclusion

Over the period 2015–2025, extra-EU trade in photographic and cinematographic goods underwent a fundamental transformation. The EU moved from a solid net exporter to a net importer, a reversal fuelled by collapsing export volumes in traditional segments and an explosive increase in imports of high-value exposed and developed media. The realignment of trade partners was profound: the United Kingdom lost its dominant role, the United States and China emerged as the primary sources of imports, and EU exports to Russia dried up in the wake of sanctions. Internally, Ireland became the unexpected epicentre of import growth, while Belgium, Germany and the Netherlands maintained their specialisation as the EU's leading exporters, albeit on a shrinking scale. Looking ahead, the EU's photographic goods trade balance is likely to remain under pressure unless export volumes or export prices in the exposed/developed segments can match the sustained import hunger, particularly in the Irish-led import channel.

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.