EU TRADE EXPLORER

Market evolution: Power tools (CN 8467) — 2015–2025

Introduction

EU trade in power tools (CN 8467) underwent a profound transformation between 2015 and 2025. While the value of both exports and imports grew, the story is one of deepening structural deficit, widening price divergence and increasing reliance on a single dominant supplier. The following analysis dissects these developments using official trade data, focusing on the dynamics that have reshaped Europe's position in the global market for hand-held motorised tools.

1. A Structurally Deepening Trade Deficit Driven by Volume Surge

The EU's power tool trade balance has more than doubled its deficit as import volumes soared while export tonnage contracted

From 2015 to 2025 the EU's trade deficit in CN 8467 widened from EUR 0.7 billion to EUR 1.6 billion, a 134 % deterioration (EU trade overview). This was not due to a collapse in exports – which rose 9 % in value – but to a 36 % jump in imports, propelled by a 43 % increase in shipped volume. Table 1 summarises the headline figures.

Indicator	2015	2025	Change
Exports (M EUR)	2 526	2 752	+9 %
Imports (M EUR)	3 223	4 386	+36 %
Trade balance (M EUR)	–697	–1 634	–134 %
Export quantity (k t)	97.9	71.5	–27 %
Import quantity (k t)	269.9	385.1	+43 %

Unit price divergence signals a twin-track market: the EU sells ever more expensive tools while buying ever cheaper ones

The average export price of EU power tools climbed from EUR 25 795/t to EUR 38 471/t (+49 %), whereas the import unit value drifted down from EUR 11 942/t to EUR 11 388/t (–5 %). This gap highlights a specialisation pattern: Europe is producing high-end, high-value tools, while a large part of its demand for mass-market devices is met by lower-cost imports.

Net import reliance has climbed to a level that underlines growing supply-chain vulnerability

The indicator net import reliance rose from 16.9 % in 2015 to 30.4 % in 2025 (latest available: 2024 = 30.4 %). In parallel, trade intensity reached 81 % and export propensity 62 %, confirming that the EU power tool market is deeply embedded in global value chains.

2. China's Overwhelming Role and the 2022 Price Shock

China supplies three-quarters of EU power tool imports, entrenching a supply concentration that has risen further

China accounted for 74 % of total extra-EU imports in value by 2025, up from 65 % in 2015. Its sales to the EU grew from EUR 2.1 billion to EUR 3.3 billion, a gain of 55 % (Top trading partners). No other supplier comes close: the next largest – the United States, Japan and the United Kingdom – each supplied less than EUR 0.3 billion in 2025.

A sharp price spike in 2022 briefly interrupted the low-cost trend from China

In 2022 the unit price of Chinese tools jumped 24 % above the 2020-2021 baseline, coinciding with a dip in delivered volume (Supply and price shocks). This shock, which affected 98.9 % of the import value from China, was temporary: by 2024-2025 prices had returned to pre-shock levels. It nonetheless revealed how fully the EU's imports are tied to one partner.

Other emerging suppliers remain small, despite extremely high growth from a few

Outside China, the highest volatility in import quantities came from Mexico (CV 3.05) and Vietnam (CV 1.65), reflecting huge percentage increases from a tiny base. However, their absolute contribution remains marginal: together they supplied less than EUR 0.15 billion in 2025. The import market shows a Herfindahl-Hirschman Index that rose from 4 398 to 5 611, confirming a market concentration that is both high and increasing.

3. The EU's Export Reorientation: High-Value Niche and Geographical Diversification

Strong sales growth to the United States has more than compensated for the collapse of the Russian market

Exports to the United States climbed 44 % to EUR 778 million, while deliveries to Russia virtually ceased (–100 %) following the imposition of sanctions. The United Kingdom remained the EU's second export destination, with a stable EUR 0.4 billion. Table 2 summarises the shifts among the principal export markets.

Export partner	2015 (M EUR)	2025 (M EUR)	Change
United States	539	778	+44 %
United Kingdom	381	402	+6 %
Russia	162	0.4	–100 %
Switzerland	180	204	+14 %
China	123	152	+24 %
Türkiye	111	137	+24 %

Electromechanical tools (excl. saws and drills) have become the flagship export segment, driven by steep price increases

The sub-category 846729 ("Electromechanical tools… excl. saws and drills") dominated both exports and imports. Its export value rose 36 % to EUR 1 068 million, even though shipped tonnage declined slightly; the average price surged from EUR 23 709/t to EUR 39 751/t. Drills (846721), by contrast, saw exports shrink 39 % in value and nearly halve in volume, illustrating the shift toward higher-value electromechanical products (Product segment breakdown).

Central and Eastern Europe show strong revealed comparative advantage, confirming a specialisation pattern that sustains EU exports

In 2025 the most specialised EU exporters were Romania (RSCA 0.56), Sweden (0.54) and Austria (0.41), according to the specialisation map. These countries combine high product shares with above-average competitiveness, and alongside Germany – the largest exporter by value – they anchor the EU's position as a supplier of premium power tools.

Conclusion

The EU power tool market over the last decade has become simultaneously more export-oriented and more import-dependent. A large and growing deficit is driven by mass-market imports from China, whose dominance has only intensified. In response, EU manufacturers have pivoted toward high-value segments, capturing price premiums particularly in the US market and expanding sales to diversified destinations after the loss of the Russian market. The result is a bifurcated industry: a heavy reliance on a single low-cost supplier for volume demand, and a competitive, specialised export base that trades on quality and innovation.

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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.