Market evolution: Radio receivers (CN 8527) — 2015–2025

Introduction

This report examines the European Union's external trade in radio-broadcast receivers (CN 8527), covering the period from 2015 to 2025. The product class includes pocket-size and mains-operated receivers, in-car units, and combinations with sound recording/reproducing apparatus or clocks. The analysis draws exclusively on the data provided by the International Trade dashboard, describing the evolution of imports, exports, production, and the main shocks that have reshaped the market.

Persistent contraction in trade volumes, but EU self-sufficiency improves markedly

Both import and export values plummet, shrinking the EU's radio receiver market

Over the decade, extra-EU trade in radio receivers contracted sharply. EU-wide exports fell from € 660 million to € 338 million (–48.8 %), while the quantity shipped abroad dropped even more (–58.0 %). Imports followed a similar downward path, declining from € 1 474 million to € 606 million (–58.9 %) in value and –57.9 % in quantity. The following table summarises the headline figures.

Indicator (€ million, unless noted)	2015	2025	Change
Extra-EU exports (value)	660.1	338.2	–48.8 %
Extra-EU exports (quantity, tonnes)	9 020	3 786	–58.0 %
Extra-EU imports (value)	1 474.0	606.5	–58.9 %
Extra-EU imports (quantity, tonnes)	67 899	28 587	–57.9 %
Trade balance	–814.0	–268.3	+67.0 %
Net import reliance (%)	37.8	7.7	–79.7 %

Source: General Overview and Vulnerability indicators.

The trade deficit narrows sharply, reflecting greater domestic sourcing

The EU's structural trade deficit in radio receivers diminished from € 814 million in 2015 to € 268 million in 2025, a 67 % improvement. This was largely driven by a faster contraction of imports than exports. Concurrently, the net-import-reliance ratio – the share of apparent consumption covered by net imports – fell from 37.8 % to just 7.7 %. Export propensity also declined from 24.8 % to 10.3 %, indicating that a significantly smaller share of EU production is sold abroad. Together, these metrics point to a market where domestic production increasingly caters to internal demand.

EU production volumes rise while unit values fall

In contrast to the collapsing trade flows, EU production of radio receivers grew by 32.6 % in quantity (from 24.2 million to 32.1 million units). Over the same period, production value moved only marginally from € 2 924 million to € 2 973 million, implying a substantial fall in the average unit price of domestically manufactured receivers. The combination of rising output and lower unit values suggests that EU manufacturers have shifted toward simpler, lower-cost devices, partly compensating for the loss of export markets with affordable products for domestic consumption.

A structural shift in product mix: the decline of in-car entertainment

In-car receivers dominate the trade decline as vehicles integrate digital infotainment

The most dramatic contraction occurred in the two motor-vehicle segments. Imports of car radios combined with sound recording/reproducing apparatus (8527 21) plunged from € 388.9 million to € 69.4 million, while imports of car radios without recording/reproducing capability (8527 29) dropped from € 295.2 million to € 53.3 million. Export values for the combined car segment fell from € 472.6 million to € 168.7 million, though the simpler car receiver (8527 29) actually increased its export value from € 87.1 million to € 104.0 million. These movements reflect the integration of sophisticated infotainment systems in new vehicles, which has drastically reduced the after-market and OEM demand for traditional car radios.

Mains-operated and portable segments show mixed resilience

Outside the automotive segments, the picture is more varied. Mains-operated receivers combined with sound recording/reproducing apparatus (8527 91) remained the largest import sub-category in 2025 (€ 180.1 million, down from € 338.6 million). Portable receivers (8527 13 and 8527 19) held up better; imports of portable receivers without recording capability (8527 19) even edged up from € 118.8 million to € 133.1 million. Exports of mains-only receivers with a clock (8527 92) were relatively stable, and portable receivers for export showed modest declines. The overall trend is one of a market that is moving away from high-value integrated devices towards more basic, stand-alone radios.

Export unit prices rise, partly offsetting volume losses

While import prices remained virtually flat (–2.3 %), the average unit price of EU exports increased by 22.0 % over the period (from € 73 173/tonne to € 89 302/tonne). In the main export segment, car radios (8527 21), unit prices nearly doubled (from € 86 879/tonne to € 152 880/tonne), indicating that EU producers have shifted towards higher-valued, possibly more specialised on-board units. This price effect cushioned the export revenue decline, but it was not sufficient to prevent the overall value contraction.

Geopolitical shocks and rising import concentration reshape supply chains

China remains the leading supplier but absolute volumes shrink, and import concentration intensifies

China retained its position as the dominant extra-EU supplier, although its imports to the EU fell from € 753.7 million to € 414.5 million (–45.0 %). The import basket became significantly more concentrated: the Herfindahl-Hirschman Index (HHI) rose from 3 005 to 4 869 (+62 %). This was driven not only by China's persistent share but also by the collapse of previously significant suppliers such as Thailand (–88.4 %), Hong Kong (–94.2 %) and the United Kingdom (–92.4 %). As a result, a few Asian economies now account for a very large portion of the remaining import bill.

The Russia export market vanishes following sanctions, while Türkiye and Switzerland emerge as stable destinations

The imposition of trade sanctions following Russia's invasion of Ukraine led to a near-total collapse of EU radio receiver exports to that market. Shipments to the Russian Federation fell from € 21.0 million in 2015 to virtually zero in 2025 (–99.7 %), with the dashboard identifying a supply shock centred on 2025. In contrast, exports to Türkiye (+49.2 %) and Switzerland (+58.5 %) grew solidly, making them the EU's two largest export destinations by 2025. The United Kingdom, once the top export market, saw its value drop by 65.0 %, from € 233.4 million to € 81.6 million, largely mirroring the broader demand decline.

Price shocks and supply disruptions underscore the segment's volatility

Several shock events punctuated the period. A sharp price jump (+83.2 %) occurred in EU exports to China centred on 2020, while exports to Norway experienced a temporary price spike in 2017. On the import side, a modest negative price shock was detected for Malaysian shipments in 2021. The volatility bars confirm that many supplier flows – especially those from Malaysia, Viet Nam, Thailand, and the United Kingdom – exhibited very high year-to-year variability, reflecting the uncertainty and rapid restructuring of this mature product market.

Conclusion

The EU's extra-EU trade in radio receivers contracted sharply between 2015 and 2025, with both import and export values roughly halving. A structural break is clearly visible: the traditional in-car radio segment collapsed, while simpler portable and mains-operated devices proved more resilient. At the same time, the EU's self-sufficiency improved markedly – the net-import-reliance ratio fell to single digits – as domestic production grew in volume terms while migrating towards lower-cost products. The geography of trade was reshuffled by geopolitical shocks (notably the virtual disappearance of the Russian market) and by the increasing concentration of imports in a handful of Asian suppliers, first and foremost China. Looking ahead, the market appears to be stabilising at a much lower level, with a largely self-sufficient EU industry focused on basic receivers and a concentrated, though smaller, external supply chain.

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