EU TRADE EXPLORER

Market evolution: Televisions and monitors (CN 8528) — 2015–2025

Introduction

The EU's external trade in monitors and televisions (CN 8528) underwent a profound transformation between 2015 and 2025. Over the decade, the Union shifted from a significant producer and exporter to a heavily import-dependent market. Total imports rose from €8.4 billion to €9.4 billion (+11.8 %), while exports declined from €5.3 billion to €4.7 billion (−11.2 %), widening the trade deficit by more than half (Trade overview). This report identifies three central dynamics: the collapse of EU production and soaring import reliance, a radical reconfiguration of trading partners driven by geopolitics and industrial relocation, and a deep product-mix shift from televisions toward computer monitors.

1. The Collapse of EU Production and the Surge of Import Dependence

The EU's domestic manufacturing base shrivelled in both volume and value, while import reliance tripled

Between 2015 and 2024 (the last year with production data), EU output of CN 8528 goods fell from 11.6 million units to 10.5 million units (−10 %), but the value of that production collapsed from €3.9 billion to €2.0 billion (−48.7 %) (EU production volumes). The implied unit price tumbled from €336 to €191, signalling a move towards cheaper segments and intense price pressure from Asian imports.

Net import reliance exploded from 18.5 % to 72.8 %, underlining a dramatic loss of self-sufficiency

The Net import reliance indicator rose from 18.5 % in 2015 to 72.8 % in 2024, a jump of 293.7 %. At the same time, export propensity soared to 126 %, meaning that the value of EU exports now exceeds the value of EU-based production—a clear sign that re-exports through hub economies (especially the Netherlands) dominate the export statistics.

The EU trade deficit deepened by 50 %, with imports outpacing exports in every year

The trade imbalance widened from −€3.2 billion in 2015 to −€4.8 billion in 2025. In volume terms, import quantities grew by 20.2 %, while export quantities fell by 9.4 % (Trade overview). The average import price dropped by 7 %, making foreign goods even more attractive to EU buyers.

2. A New Geography of Supply: China, Vietnam, and Geopolitical Realignments

China reinforced its role as the indispensable supplier, while Vietnam emerged as the fastest-growing alternative

China's share of EU imports remained overwhelming: its exports to the EU grew from €4.7 billion to €6.2 billion (+32.8 %) (Top trading partners). However, the most spectacular change came from Vietnam, whose shipments ballooned from just €58 million to €1.38 billion (+2 261.7 %), making it the second-largest source by 2025. This re-routing of supply chains towards Southeast Asia is one of the decade's defining features.

Traditional partners such as the UK, Korea, Japan and Türkiye lost substantial ground

The following table captures the shifts among the major import origins:

Partner	2015 (€ m)	2025 (€ m)	Change (%)
China	4 666.4	6 199.3	+32.8
Vietnam	58.3	1 375.8	+2 261.7
Türkiye	819.1	336.6	−58.9
United Kingdom	447.6	86.7	−80.6
Korea, Republic of	321.2	94.9	−70.5
Japan	453.3	222.7	−50.9
Taiwan	233.6	143.8	−38.5

Source: Top trading partners

Geopolitical shocks reshaped export destinations: Russia collapsed, Ukraine and Israel surged

On the export side, EU shipments to Russia evaporated after the 2022 sanctions—from €223 million in 2015 to less than €1 million in 2025 (−99.6 %). Exports to Ukraine, by contrast, rose 235 % to €120 million, and to Israel by 141.6 % to €111 million. The United

Kingdom, though still the top export market at €1.75 billion, saw sales decline by 27.4 % over the period, partly due to post-Brexit trade frictions and competitive displacement.

Price shocks during the COVID-19 pandemic temporarily disrupted established trade flows

The Volatility & Shocks analysis detected significant price anomalies in 2021. Import prices from China jumped 12.1 % while volumes kept rising; from Türkiye they spiked 36.1 % even as quantities fell. On the export side, prices to the UK rose 14.4 % despite a drop in volumes. These events underscore how global logistics bottlenecks momentarily altered pricing power.

3. Inside the EU: Product-Mix Transformation and Diverging Member-State Roles

The EU trade basket shifted decisively from television sets to computer monitors

The product segment breakdown reveals a clear recomposition. In imports, colour television receivers (852872) fell from €1.3 billion to €0.86 billion, while monitors for automatic data-processing machines (852852) climbed to €6.0 billion, accounting for almost two-thirds of all imports. TV reception apparatus without a screen (852871, mainly set-top boxes) also declined from €2.2 billion to €1.3 billion. On the export side, monitors (852852) grew to €1.73 billion, nearly matching televisions (852872) at €1.90 billion.

Concentration of imports increased, while exports became more diversified

The HHI concentration measure for imports climbed from 3 386 to 4 574 (+35.1 %), reflecting the growing weight of China and Vietnam. For exports, the HHI dropped from 2 391 to 1 747 (−26.9 %), as the Union found new outlets beyond a few traditional markets. This dual trend signals that while supply is concentrating in a handful of Asian factories, EU export competitiveness is spreading across a larger set of partners.

Member States display starkly different specialisation profiles

In 2025 the most specialised EU exporters were Slovakia (RSCA 0.76), Poland (0.56), Latvia (0.55), Hungary (0.53) and Slovenia (0.47). These countries operate large assembly plants for televisions and monitors. At the opposite end, Malta, Ireland, Cyprus, Luxembourg and Finland show almost no revealed comparative advantage. Among the largest importers, the Netherlands and Poland play hub roles, while Germany's imports halved from €1.69 billion to €0.87 billion (−48.4 %) (Top reporters), likely reflecting a move of assembly activities to Central Europe.

Conclusion

Between 2015 and 2025 the EU's market for monitors and televisions underwent a fundamental restructuring. Domestic production dwindled, import reliance tripled, and the trade deficit swelled. China retained its role as the dominant supplier while Vietnam emerged as a strategic second source. Geopolitical ruptures—Brexit, sanctions on Russia, and the war in Ukraine—redrew export maps. Internally, the product focus shifted from television sets to computer monitors, and EU member states' roles became more polarised between hub distributors and specialist manufacturers. The combination of a highly concentrated import structure, declining domestic value added, and a product portfolio increasingly dependent on a few Asian countries poses significant challenges for the EU's strategic autonomy in display technologies.

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