EU TRADE EXPLORER

# Market evolution: Video cameras and recorders (CN 8525) — 2015–2025

## Introduction

This report examines the European Union's trade in goods classified under customs code 8525 – a heading that bundles transmission apparatus for radio-broadcasting or television, television cameras, digital cameras and video camera recorders – with non-EU partners from 2015 to 2025. Data from the Trade Dashboard is used to describe and interpret the main dynamics. Over the decade, total trade in this category expanded markedly, but beneath the headline growth lie major shifts in supplier and buyer patterns, product mix and the unit values at which goods are exchanged.

## 1. Headline growth masks a deepening deficit and a profound change in export quality

The aggregate trade figures show a robust expansion of both imports and exports, yet the EU's trade deficit widened as import volumes outpaced exports while export unit values climbed far more steeply.

### Total exports rose from €2.9 bn to €4.7 bn, while imports grew from €4.2 bn to €6.7 bn

Between 2015 and 2025, EU extra-EU exports of CN 8525 products increased by 59.5 %, from €2.92 bn to €4.65 bn. Imports rose by 59.8 %, from €4.22 bn to €6.74 bn (General Overview). Consequently, the already negative trade balance worsened by 60.4 %, from –€1.30 bn to –€2.09 bn.

| Flow | 2015 (€ bn) | 2025 (€ bn) | Change |
|---|---|---|---|
| Exports | 2.92 | 4.65 | +59.5% |
| Imports | 4.22 | 6.74 | +59.8% |
| Balance | –1.30 | –2.09 | –60.4% |

### Export unit values surged, while import prices increased only moderately

The quantities traded reveal divergent trends. Export volume grew by only 13.4 % (from 10.6 thousand tonnes to 12.1 thousand tonnes), whereas import volume leapt by 45.7 %

(from 34.0 to 49.5 thousand tonnes). The implied unit values therefore show export prices climbing by 40.6 % (from €274 thousand/tonne to €385 thousand/tonne) against a meagre 9.6 % rise for imports (€124 thousand to €136 thousand/tonne). This suggests that EU exporters are moving toward higher-value items – likely advanced camera systems and specialised equipment – while imports continue to be dominated by mass-market consumer electronics.

| Indicator | 2015 | 2025 | Change |
|---|---|---|---|
| Export quantity (thousand tonnes) | 10.6 | 12.1 | +13.4% |
| Import quantity (thousand tonnes) | 34.0 | 49.5 | +45.7% |
| Export unit value (€/tonne) | 273,913 | 385,104 | +40.6% |
| Import unit value (€/tonne) | 124,153 | 136,087 | +9.6% |

## 2. Geopolitical reorientation: China consolidates its supplier role while EU exports diversify away from the UK

The partner-country data reveal a profound redrawing of trade links. On the import side, China reinforced its overwhelming dominance; on the export side, the United States overtook the United Kingdom as the top destination, and several Asian and Middle Eastern markets expanded rapidly.

### China now supplies close to half of all extra-EU imports, while the UK's share dwindles

Chinese shipments to the EU rose by 95.5 % over the period, from €1.52 bn to €2.97 bn. In 2025, China alone accounted for 44 % of total CN 8525 imports. Viet Nam's imports exploded by 1,609 % (from €27 mn to €463 mn) and Thailand's by 146 % (to €502 mn). Meanwhile, imports from the United Kingdom fell by 17.3 % (to €266 mn) and those from Japan dropped by 39.2 % (to €557 mn) (Top Partners).

| Import partner | 2015 (€ mn) | 2025 (€ mn) | Change |
|---|---|---|---|
| China | 1,520 | 2,973 | +95.5% |
| United States | 395 | 764 | +93.2% |
| Japan | 916 | 557 | –39.2% |
| Thailand | 204 | 502 | +146.2% |
| Viet Nam | 27 | 463 | +1,609.2% |
| United Kingdom | 321 | 266 | –17.3% |
| Taiwan | 238 | 168 | –29.7% |

## EU exports have shifted rapidly toward the US, China, Switzerland and the Gulf, while UK shipments shrank

The United States became the foremost export market, rising 79.3 % to €880 mn. Exports to China surged by 363.8 % to €647 mn, and those to Switzerland (+159.7 % to €272 mn), Norway (+93.9 % to €162 mn), Türkiye (+88.0 % to €210 mn) and the United Arab Emirates (+85.8 % to €257 mn) all grew strongly. In contrast, exports to the United Kingdom fell by a third (–33.1 % to €576 mn), partly reflecting post-Brexit trade friction and a structural decline in volume documented by the 2020 price-quantity shock (see Section 3).

| Export partner | 2015 (€ mn) | 2025 (€ mn) | Change |
|---|---|---|---|
| United States | 490 | 880 | +79.3% |
| China | 140 | 647 | +363.8% |
| United Kingdom | 860 | 576 | –33.1% |
| Switzerland | 105 | 272 | +159.7% |
| United Arab Emirates | 139 | 257 | +85.8% |
| Türkiye | 111 | 210 | +88.0% |
| Norway | 84 | 162 | +93.9% |

## The partner concentration of imports has increased, while exports have become more diversified

The Herfindahl-Hirschman Index (HHI) for imports increased from 1,999 to 2,306 (+15.4 %), reflecting China's growing weight. For exports, the HHI fell from 1,297 to 871 (–32.8 %), indicating a more balanced spread of destination markets (Concentration).

# 3. The product mix is dominated by digital camera equipment, while price shocks and supply disruptions highlight structural vulnerabilities

The CN 8525 heading bundles several distinct product types. Data for sub-codes is only available from 2022, but it shows that the vast majority of trade is in standard television/ video cameras and recorders. At the same time, the volatility analysis reveals major price shocks, particularly linked to the UK's exit from the EU single market and the sanctions against Russia.

## Standard digital cameras and video recorders (8525 89) dominate both imports and exports

In 2025, sub-code 8525 89 (television cameras, digital cameras and video camera recorders, excluding specialised items) accounted for €5.84 bn of the €6.74 bn import value (87 %) and €4.15 bn of the €4.65 bn export value (89 %) (Product Segment Breakdown).

Transmission apparatus (8525 50 and 8525 60) and specialised cameras (night-vision 8525 83, high-speed 8525 81, radiation-hardened 8525 82) make up the remainder. The dominance of 8525 89 explains why unit values are relatively low on the import side (mass-market goods) and rising on the export side as EU producers focus on premium models.

| Sub-code (2025) | Imports (€ mn) | Imports share | Exports (€ mn) | Exports share |
|---|---|---|---|---|
| 8525 89 – Standard cameras/ recorders | 5,838 | 86.6% | 4,155 | 89.3% |
| 8525 50 – Transmission (w/o reception) | 170 | 2.5% | 116 | 2.5% |
| 8525 60 – Transmission (with reception) | 456 | 6.8% | 225 | 4.8% |
| 8525 83 – Night vision cameras | 192 | 2.8% | 80 | 1.7% |
| 8525 81 – High-speed cameras | 77 | 1.1% | 67 | 1.4% |
| 8525 82 – Radiation-hardened cameras | 10 | 0.1% | 15 | 0.3% |
| **Total** | **6,741** | **100%** | **4,651** | **100%** |

## The UK departure triggered a massive price shock in EU exports, while sanctions halted trade with Russia

The Volatility & Shocks analysis detects several extreme events. EU exports to the United Kingdom experienced a price shock of +383 % in 2020, as the average unit value jumped from €38,800 per tonne in 2018–2019 to €187,350 per tonne in 2020, while volumes collapsed by 83 %. This pattern is consistent with the end of frictionless trade, likely reflecting a shift away from lower-value consumer shipments.

Similarly, exports to Russia suffered a supply shock from 2023 onward: volumes fell from 210 tonnes (2021) to less than 5 tonnes (2024) while unit prices spiked by over 200 % as the remaining trade shifted to high-value, possibly exempted, goods.

On the import side, Thailand saw a price shock of +189 % in 2022, though its overall value share (13.7 %) meant the effect on aggregate import prices was limited. A mild price adjustment was also detected for Chinese imports in 2022 (+20 %), which partly reversed afterward.

## EU member state specialisation reveals a concentration of export capacity in a few countries

The 2025 Specialisation Map shows that Slovakia (RCA 3.06), Estonia (2.37), Hungary (2.14), the Netherlands (1.95) and Romania (1.80) have the highest revealed comparative advantage in these products. Germany, although the largest exporter in value terms

(€2.03 bn in 2025, +125.5 % growth), has an RCA close to 1 (0.97), indicating it exports roughly in line with its share of total EU trade. The Netherlands, while highly specialised, saw its exports decline by 28.2 % over the decade, possibly due to re-routing of logistics. Poland's exports soared by 811 % (to €303 mn), signalling rapid catch-up.

## Conclusion

The EU's external trade in CN 8525 products grew strongly over the 2015–2025 period, driven by booming demand for digital cameras and recorders. The dominant growth story is the further concentration of import supply in China and emerging Asian economies, while the EU's own export base has diversified away from the UK toward the US, China and other markets. The export portfolio has undergone a clear quality upgrade, as rising unit values indicate a shift toward higher-end equipment. However, the data also reveal lasting disruption effects from Brexit and Russia-related sanctions, as well as supply-price shocks in key partner countries. Going forward, the EU's trade deficit in this category is likely to persist, underpinned by the structural import reliance on Asian mass-market electronics, even as EU manufacturers reinforce their position in specialised and high-value segments.

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