

International trade in goods by type of good

Statistics Explained

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Highlights 2024, machinery and transport equipment accounted for 39% of all goods exported from the EU and for 33% of all goods imported into the EU.

In 2024, the United States was the main destination for EU exports of medicinal and pharmaceutical products, motor cars and iron and steel.

[Globalisation patterns in EU trade and investment](#) is an online [Eurostat](#) publication presenting a summary of recent [European Union \(EU\)](#) statistics on economic aspects of globalisation, focusing on patterns of EU trade and investment.

This article examines in more detail the different types of goods that are traded between nations. Globalisation, falling trade costs and technological progress are thought to have driven the international fragmentation of production and the development of international production/supply chains. These changes to the way in which goods (and services) are produced, has resulted in manufacturing processes being split into different stages so that intermediate inputs may be sourced from the most efficient producers, even if they are spread across disparate locations. As a result, the relative importance of intermediate goods - the inputs which connect different production stages together - as a share of total trade has risen at a rapid pace.

International trade in goods - developments by broad economic category

Statistics on international trade in goods by broad economic category (BEC)

As global production chains have developed into complex production networks it has become increasingly difficult, from a statistical perspective, to measure where specific (end) goods are made and by whom. Indeed, an analysis of international trade developments based on gross measures has become less accurate, as intermediate goods (parts and components) may be counted several times as they cross borders to be used at various stages of the manufacturing process.

The classification of international trade statistics by [broad economic category \(BEC\)](#) is managed by the United Nations. These statistics permit the conversion of international trade data based on the standard international trade classification (SITC) into three end-use categories: capital goods, intermediate goods and consumption goods. **The share of intermediate goods in all extra-EU imports peaked in 2011-22**

Figure 1 shows the development of the share of intermediate goods in total trade for the [EU](#) over the period covering 2017-2024. Throughout this period this share was highest for extra-EU imports and lowest for extra-EU exports with intra-EU exports falling in between. This should come as no surprise since raw materials and energy are more abundant in extra-EU imports than in extra-EU exports which are dominated by manufactured goods. The share of intermediate goods for extra-EU imports, measured in value, peaked in 2022 at 60.5% and fell back to 58.3% in 2024. It should be noted that price fluctuations of energy products have a substantial impact on the share of trade in intermediate goods.

Figure 1 The predominance of intermediate goods in total trade is shown in Figure 2. Across the EU, intermediate goods accounted for just over half (51.4%) of all goods that were exported in 2024; as noted above, the corresponding share for imports was higher, at 58.3%. For comparison, capital goods (23.5%) and consumption goods (25.1%) each accounted for around a quarter of all exported goods. In imports the share of capital goods (16.1%) was lower than in exports while consumption goods (25.6%) had similar shares in exports and imports.

Figure 2 Shares of intermediate products in total trade vary considerably among EU countries

In 2024, a majority of the EU countries reported that intermediate goods contributed more than half of their total trade in value terms, both for imports (19 EU countries) and exports (16 EU countries); note these were not the same EU countries for each trade flow (see Figures 3 and 4). The share of intermediate goods in total exports was over 60% in Ireland (77.3%), Malta (68.8%), Slovenia (66.5%), Finland (64.4%), Luxembourg and Bulgaria (both 63.9%) and below 40% only in Cyprus (23.9%). The share of intermediate goods in total imports was highest in Slovenia (69.0%), Hungary (61.8%), Slovakia (61.2%), and Bulgaria (60.2%) while only Malta (42.9%) and Cyprus (35.0%) had shares below 45%.

Figure 3 Figure 4

International trade in goods - developments for key product groups

Historically, the biggest shifts in international trade by product resulted in a marked decline in the relative contribution of agricultural products to total trade, while the share of manufactured goods increased. When asked to picture globalisation today, many people are likely to imagine a cargo ship transporting large quantities of manufactured goods to distant markets on the other side of the world. A closer examination reveals that the bulk of international trade in goods is relatively concentrated within some key product groups, while there are many goods where the level of international trade remains quite low. Indeed, as noted in the article [International trade in goods - an overview](#), the intrinsic nature of some goods (for example, those with a limited shelf-life or those that are bulky) means that they are principally consumed within domestic or neighbouring markets.

In 2024, machinery and transport equipment accounted for € 1 013 billion or 39% of all goods exported from the EU.

Figure 5 shows the development of extra-EU exports for the top level headings from the [standard international trade classification \(SITC\)](#). One of the most striking aspects is the high value of machinery and transport equipment, which was € 1 013 billion in 2024 (39.2% of all exports). The next highest values were recorded for chemicals and related products (€ 560 billion, 21.7%) and other manufactured goods (€ 558 billion, 21.6%) while food, drinks and tobacco (€ 209 billion, 8.1%), mineral fuels, lubricants and related materials (€ 131 billion, 5.1%) and raw materials (€ 68 billion, 2.6%) accounted for much lower shares.

Looking at developments during the period 2002-2024, the impact of the global financial and economic crisis in 2009 and the COVID-19 crisis in 2020 on the different product headings is evident. In 2009 exports decreased sharply for all product groups. By contrast, in 2020 exports of chemicals, food, drinks and tobacco and raw materials were much less impacted than exports of machinery and transport equipment, other manufactured goods and mineral fuels. A comparison of developments for EU exports between 2002 and 2024 reveals that in absolute terms machinery and transport equipment (+€ 556 billion) increased the most. In relative terms its value was 2.2 times as high as in 2002, which was similar to the growth of other manufactured goods (2.1 times as high) but much lower than mineral fuels which in 2024 were 5.4 times as high as in 2002. By comparison, the exports values in the other three groups in 2024 were between 3.1 and 3.7 times as much as in 2002.

Figure 5 A-typical development for imports of mineral fuels, lubricants and related materials due to fluctuation of oil prices

Complementary information on developments for EU imports is presented in Figure 6 (based on the same product headings). Due to sharply increasing prices, mineral fuels, lubricants and related materials temporarily became the largest product group in imports in 2022 but dropped to third place in 2024 (€ 466 billion, 19.1%). In 2024 it was preceded by machinery and transport equipment (€ 801 billion, 32.9%) and other manufactured goods (€ 569 billion, 23.3%). All products follow the same pattern, a decline in 2009 followed by a recovery in the following years.

The COVID-19 pandemic caused a large drop in 2020 but a strong recovery followed in 2021 and 2022. Over the whole period, imports of machinery and transport equipment increased most (+€ 462 billion), followed by other manufactured goods (+€ 343 billion) and mineral fuels (+€ 313 billion). In relative terms chemicals and related products increased the most, being 3.3 times as large in 2024 as in 2002.

Figure 6Figure 7 shows the values by product heading in extra-EU exports and extra-EU imports in 2024. As the total value of EU exports (€ 2 583 billion) was higher than imports (€ 2 437 billion), there was a surplus of € 146 billion. Figure 7 identifies those product headings where the EU had a trade surplus with non-member countries, for example, chemicals and related products (+€ 237 billion) or a trade deficit, for example, mineral fuels (-€ 355 billion).

Figure 7

International trade in goods - focus on selected product groups

This final section in this article looks in more detail at international trade developments for a selected group of specific products, where globalisation has had a significant impact on industrial structure and conduct

- medicinal and pharmaceutical products (SITC 54)
- iron and steel (SITC 67)
- motor cars (SITC 781)
- articles of apparel and clothing accessories (SITC 84).

The share of these 4 selected products in extra-EU trade is presented in Figure 8. Between 2002 and 2024 the share for medicinal and pharmaceutical products in total exports rose by 7.1 percentage points (pp), while the shares for the other three fell slightly. For imports, the share for medicinal and pharmaceutical products in total imports rose only by 1.4 pp, somewhat more than the increase for motor cars and iron and steel (0.3 pp) while articles of apparel and clothing accessories (-0.2 pp) dropped slightly. These changes should be interpreted with caution as they are the result of a combination of changes in quantities as well as changes in prices.

Figure 8 Medicinal and pharmaceutical products

Extra-EU exports of medicinal and pharmaceutical products were valued at € 313 billion in 2024, compared with extra-EU imports of € 120 billion; as such, the EU had a trade surplus of € 193 billion. According to the European Commission's Directorate-General for Trade, the most common trade impediments faced by pharmaceutical exporters are a range of burdensome and costly registration, licensing and certification procedures; the EU aims to redress these through its bilateral trade agreements or by tackling individual barriers as part of its market access partnerships. The United States was the EU's main trading partner for exports of medicinal and pharmaceutical products (see Figure 9). Just below two-fifths (38.3%) of EU exports in 2024 were destined for the United States; considerably higher than in 2002, when the United States accounted for a 30.9% share of the EU's exports of medicinal and pharmaceutical products. The next largest EU export markets were Switzerland (16.4% of all exports in 2024), the United Kingdom (5.8%) and China (5.4%).

Imports of medicinal and pharmaceutical products into the EU were even more dominated by the EU's main trading partners, as almost four-fifths of the goods imported in 2024 originated from the United States (38.3%), Switzerland (32.7%) and the United Kingdom (7.3%) combined; the next highest share was recorded for imports originating in South Korea (4.0%) (see Figure 10).

Figure 9Figure 10Among the EU countries in 2024, extra-EU exports of medicinal and pharmaceutical products were relatively concentrated in Germany (21.7% of the EU's exports), Ireland (18.0%), Belgium (13.2%) and Italy (8.9%); all 4 had the United States as their main export destination (see Table 1). For Ireland, medicinal and pharmaceutical products made up 44.7% of their total exports.

Germany (19.2%), Belgium (17.8%), the Netherlands (12.3%) and Italy (11.7%) recorded the highest shares of extra-EU imports of medicinal and pharmaceutical products in 2024, and were the only EU countries with double-digit shares (see Table 2).

Exports of medicinal and pharmaceutical products (SITC 54), 2024

	Total exports (€ million)	Share of total goods exported (%)	Extra-EU exports (€ million)	Share of extra-EU exports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	312 786	12.1	312 786	100.0			United States	119 662
Belgium	73 918	14.9	41 389	13.2	Germany	8 294	United States	17 630
Bulgaria	1 234	2.9	601	0.2	Germany	142	Russia	219
Czechia	4 354	1.8	618	0.2	Germany	1 304	United Kingdom	123
Denmark	22 329	18.1	13 643	4.4	Netherlands	1 786	United States	367
Germany	115 010	7.4	67 842	21.7	Netherlands	8 985	United States	27 707
Estonia	117	0.7	21	0.0	Lithuania	29	Switzerland	14
Ireland	99 537	44.7	56 261	18.0	Netherlands	13 705	United States	44 327
Greece	2 830	5.7	830	0.3	Germany	333	United Kingdom	160
Spain	18 604	4.7	8 951	2.9	Germany	2 671	Switzerland	2 652
France	36 703	6.2	17 851	5.7	Germany	4 279	United States	3 719
Croatia	1 270	5.3	659	0.2	Belgium	77	United States	317
Italy	52 866	8.5	27 971	8.9	Belgium	7 109	United States	9 988
Cyprus	436	10.7	152	0.0	France	55	Malaysia	7
Latvia	643	3.4	264	0.1	Lithuania	153	Russia	67
Lithuania	1 250	3.4	442	0.1	Latvia	219	United States	54
Luxembourg	249	1.7	31	0.0	Belgium	108	United Kingdom	29
Hungary	10 470	7.2	2 564	0.8	Poland	1 762	Russia	436
Malta	435	12.5	135	0.0	Germany	65	United Kingdom	38
Netherlands	62 763	7.4	27 554	8.8	Germany	11 541	United States	5 746
Austria	19 970	10.1	9 859	3.2	Germany	3 712	United States	4 554
Poland	6 511	1.9	1 922	0.6	Germany	1 357	Russia	348
Portugal	3 540	4.5	1 599	0.5	Germany	1 153	United States	1 171
Romania	1 927	2.1	904	0.3	Germany	239	Switzerland	622
Slovenia	25 108	34.4	22 335	7.1	Croatia	411	Switzerland	20 054
Slovakia	901	0.8	87	0.0	Czechia	379	Ukraine	22
Finland	2 262	3.1	1 529	0.5	Germany	165	United States	1 003
Sweden	13 214	7.3	6 769	2.2	Germany	2 210	United States	1 489

Note: main destination of exports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)



Table 1: Exports of medicinal and pharmaceutical products (SITC 54), 2024 Source: Eurostat (ds-059331)

Imports of medicinal and pharmaceutical products (SITC 54), 2024

	Total imports (€ million)	Share of total goods imported (%)	Extra-EU imports (€ million)	Share of extra-EU imports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	119 711	4.9	119 711	100.0			United States	45 862
Belgium	60 925	12.8	21 322	17.8	Ireland	14 856	United States	8 375
Bulgaria	2 127	4.3	312	0.3	Germany	435	Switzerland	192
Czechia	7 498	3.5	751	0.6	Germany	1 562	Switzerland	452
Denmark	7 005	6.2	2 544	2.1	Germany	979	United States	811
Germany	73 888	5.6	22 976	19.2	Netherlands	13 521	Switzerland	8 730
Estonia	829	4.0	55	0.0	Lithuania	270	Switzerland	33
Ireland	15 694	11.8	7 355	6.1	Germany	4 254	United States	3 951
Greece	4 131	4.9	448	0.4	Germany	927	Switzerland	285
Spain	22 971	5.3	7 786	6.5	Germany	3 450	United States	4 728
France	32 636	4.7	7 876	6.6	Netherlands	5 134	United States	2 016
Croatia	1 977	4.6	215	0.2	Slovenia	412	Switzerland	134
Italy	41 313	7.3	14 015	11.7	Belgium	6 858	United States	7 223
Cyprus	545	4.4	118	0.1	Greece	186	Switzerland	41
Latvia	960	4.4	117	0.1	Lithuania	257	Switzerland	94
Lithuania	1 769	4.3	84	0.1	Germany	309	Switzerland	31
Luxembourg	783	3.4	6	0.0	Belgium	651	United States	3
Hungary	7 917	5.8	2 176	1.8	Germany	1 202	South Korea	1 153
Malta	486	5.6	324	0.3	Germany	36	India	223
Netherlands	49 946	6.6	14 737	12.3	Ireland	12 752	United States	7 627
Austria	11 755	6.0	3 914	3.3	Germany	3 187	United States	1 975
Poland	13 449	12.5	1 285	1.1	Germany	2 465	Switzerland	351
Portugal	4 085	3.8	506	0.4	Germany	759	Switzerland	253
Romania	6 180	4.9	1 043	0.9	Germany	1 357	Switzerland	846
Slovenia	10 247	13.1	7 787	6.5	Germany	626	Switzerland	7 151
Slovakia	3 012	2.9	298	0.2	Czechia	643	Switzerland	241
Finland	2 475	3.3	232	0.2	Denmark	530	Switzerland	109
Sweden	7 035	4.0	1 431	1.2	Germany	1 375	United States	876

Note: main origin of imports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)

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Table 2: Imports of medicinal and pharmaceutical products (SITC 54), 2024 Source: Eurostat (ds-059331)

Iron and steel

The iron and steel industry is often seen as being of strategic importance. In the last couple of decades there has been a pattern of industrialised nations relocating some of their iron and steel production facilities to developing countries; this has been driven, at least in part, by a desire to relocate production facilities closer to coal and iron ore supplies.

At the same time as the quantity of iron and steel production was falling in the EU (with output being refocused on high-end products), there was widespread investment in new plants across China; indeed, according to the world steel association, by 2023 China was producing more than half of the world's steel output (see the publication [World steel in figures 2023](#) from the website of the [World steel association](#), July 2023). The other leading global producers of steel include the EU, India, Japan and the United States.

Between 2002 and 2024 a growing share of EU exports of iron and steel were destined for Türkiye (its share rising from 5.1% in 2002 to 8.0% in 2024) and Mexico (from 3.0% in 2002 to 5.0% in 2024) (see Figure 11). The United States (20.2%) and the United Kingdom (13.8%) were the EU's main export destinations.

Alongside a rapid shift in global output of iron and steel, there were also major changes to trade patterns. These were particularly evident during the last few years, as Chinese economic growth slowed, resulting in excess Chinese capacity being redirected to foreign markets. In 2002, China accounted for just 2.1% of the EU's imports of iron and steel (see Figure 12). By 2024 the share of EU imports originating from China had jumped to 11.7% becoming the largest origin for imports of iron and steel ahead of India (10.5%) and Türkiye (10.1%).

Figure 11 Figure 12

The EU had a trade deficit of 3.9 billion in 2024 for iron and steel. In 2024, the leading exporter among the EU countries (based on total trade, in other words, intra-EU and extra-EU flows) was Germany (€ 31.2 billion) followed by Italy (€ 20.8 billion) - see Table 3. It is interesting to note that iron and steel products accounted for 12.0% of all

goods exported from Luxembourg in 2024, the next highest share being recorded in Finland (6.8% of total exports) - see Table 3.

Extra-EU iron and steel imports into the EU from non-member countries were valued at € 42.7 billion in 2024. Table 4 shows that Germany had the highest value (€ 26.9 billion) of iron and steel imports among the EU countries (based on total trade, in other words, intra-EU and extra-EU flows), followed by Italy (€ 20.1 billion) (see Table 4). Germany and Italy were the main origin of iron and steel imports for a large number of EU countries while there were also several EU countries reporting that their principal origin of imports was a neighbouring country.

Exports of iron and steel (SITC 67), 2024

	Total exports (€ million)	Share of total goods exported (%)	Extra-EU exports (€ million)	Share of extra-EU exports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	38 857	1.5	38 857	100.0			United States	7 863
Belgium	17 647	3.6	3 042	7.8	Germany	5 030	United States	718
Bulgaria	889	2.1	198	0.5	Romania	214	United States	78
Czechia	4 357	1.8	713	1.8	Germany	944	United	174
Denmark	1 354	1.1	323	0.8	Germany	315	Norway	104
Germany	31 195	2.0	9 232	23.8	Poland	3 295	United States	2 027
Estonia	269	1.5	16	0.0	Finland	85	United	1
Ireland	272	0.1	217	0.6	Sweden	22	United	153
Greece	1 044	2.1	607	1.6	Romania	106	Israel	253
Spain	9 281	2.4	2 833	7.3	France	1 682	United	615
France	12 682	2.1	3 314	8.5	Germany	2 943	United	566
Croatia	267	1.1	47	0.1	Italy	114	United	3
Italy	20 791	3.3	5 761	14.8	Germany	3 939	United States	934
Cyprus	2	0.1	2	0.0	Netherlands	0	Israel	2
Latvia	257	1.3	19	0.0	Estonia	49	Brazil	6
Lithuania	330	0.9	28	0.1	Latvia	104	Norway	15
Luxembourg	1 800	12.0	559	1.4	Germany	363	United States	144
Hungary	954	0.7	153	0.4	Austria	208	China	66
Malta	4	0.1	0	0.0	Cyprus	4	Canada	0
Netherlands	13 155	1.5	2 896	7.5	Germany	3 957	United States	938
Austria	9 943	5.0	2 423	6.2	Germany	3 126	United States	545
Poland	5 926	1.7	748	1.9	Germany	1 473	Ukraine	244
Portugal	1 871	2.4	532	1.4	Spain	832	United	164
Romania	2 478	2.7	867	2.2	Germany	379	United States	371
Slovenia	1 793	2.5	347	0.9	Germany	291	United States	85
Slovakia	4 029	3.8	274	0.7	Czechia	1 498	United States	147
Finland	4 872	6.8	671	1.7	Netherlands	1 498	United States	147
Sweden	6 887	3.8	3 034	7.8	Germany	1 097	United States	530

Note: main destination of exports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)

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Table 3: Exports of iron and steel (SITC 67), 2024 Source: Eurostat (ds-059331)

Imports of iron and steel (SITC 67), 2024

	Total imports (€ million)	Share of total goods imported (%)	Extra-EU imports (€ million)	Share of extra-EU imports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	42 688	1.8	42 688	100.0			China	4 978
Belgium	11 233	2.4	5 604	13.1	Germany	1 817	India	764
Bulgaria	1 692	3.4	1 097	2.6	Italy	101	Ukraine	514
Czechia	7 897	3.7	812	1.9	Germany	2 051	Russia	264
Denmark	3 099	2.7	843	2.0	Germany	807	Russia	274
Germany	26 946	2.1	2 708	6.3	Belgium	4 033	Switzerland	567
Estonia	711	3.4	122	0.3	Poland	96	Türkiye	56
Ireland	1 164	0.9	731	1.7	Spain	97	United Kingdom	480
Greece	1 788	2.1	892	2.1	Italy	213	Türkiye	336
Spain	10 954	2.5	4 612	10.8	France	1 429	China	523
France	13 553	2.0	1 379	3.2	Belgium	3 559	United Kingdom	282
Croatia	1 059	2.4	216	0.5	Italy	395	Türkiye	59
Italy	20 637	3.6	9 645	22.6	Germany	2 756	India	1 646
Cyprus	266	2.2	71	0.2	Italy	88	Egypt	51
Latvia	594	2.7	162	0.4	Lithuania	95	Russia	74
Lithuania	1 012	2.4	321	0.8	Poland	270	Egypt	54
Luxembourg	491	2.1	9	0.0	Germany	191	China	5
Hungary	3 040	2.2	256	0.6	Germany	588	China	45
Malta	66	0.8	10	0.0	Italy	41	Türkiye	6
Netherlands	12 909	1.7	4 533	10.6	Germany	2 437	Brazil	679
Austria	4 643	2.4	432	1.0	Germany	1 840	United States	129
Poland	12 619	11.7	2 718	6.4	Germany	3 442	Ukraine	739
Portugal	3 437	3.2	1 245	2.9	Spain	1 292	Taiwan	173
Romania	5 095	4.0	2 067	4.8	Italy	931	Türkiye	1 067
Slovenia	2 102	2.7	738	1.7	Italy	519	South Korea	470
Slovakia	3 076	2.9	189	0.4	Czechia	653	China	33
Finland	1 699	2.3	339	0.8	Germany	292	Norway	119
Sweden	4 943	2.8	937	2.2	Germany	892	United Kingdom	366

Note: main origin of imports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)



Table 4: Imports of iron and steel (SITC 67), 2024 Source: Eurostat (ds-059331)

Motor cars

The car industry has undergone a considerable change in recent years, with increased production from new producers in emerging markets, while traditional car manufacturers have faced structural issues associated with falling domestic sales and overcapacity. The industry remains dominated by a small number of global players who tend to have a presence on most continents as a result of takeovers, joint ventures, alliances and other forms of collaboration. The car industry is often seen as a pioneer for new methods of industrial organisation and is a leading exponent of global value chains, sourcing intermediate inputs from around the world and delivering these 'just-in-time' for assembly.

While car production has diversified geographically, Europe's automotive industry is concentrated in the hands of a small number of groups, including Volkswagen, Daimler, BMW, Fiat Chrysler, PSA and Renault. It should also be noted that overseas carmakers have a considerable presence manufacturing cars within the single European market, for example: General Motors in Germany and Austria; Ford in Spain; or Hyundai in Czechia. It is important to note that the statistics presented below relate to imports and exports of motor cars between national territories, regardless of the ownership of the production facilities where these cars are made.

In 2024, the United States (23.6% of the total) and the United Kingdom (20.7%) were the main destinations for EU exports of motor cars, while China (8.80%) was the third highest destination - see Figure 13. It is interesting to note that, while the share of EU exports destined for the United States and the United Kingdom declined by 5.9 pp and 13.6 pp respectively between 2002 and 2024, the share of exports destined for China rose by 7.5 pp.

Almost four-fifths of the EU's imports of motor cars in 2023 originated from 6 countries: China (16.7% of the total), Japan (16.2%), the United Kingdom (14.5%), Türkiye (12.0%), the United States (11.1%) and South Korea (10.4%) - see Figure 14. It is interesting to note the rapid decline in the share of EU motor car imports that originated from Japan (-15.7 pp) and the United Kingdom (-20.2 pp). These developments reflect the establishment of Japanese manufacturing bases within the EU, and also the growing shares of China (+16.7 pp), Türkiye (+8.5 pp) and Mexico

(+6.8 pp).

Figure 13 Figure 14 Germany was, by far, the leading exporter of motor cars among the EU countries in 2024 (see Table 5). Over half (54.7%) of all cars exported from the EU originated from Germany, far ahead of Slovakia (7.5%), Spain (6.3%) and Italy (4.9%); none of the remaining EU countries accounted for more than 5.0% of exports. The United States was the main market for cars exported from Germany, while Germany was the largest export partner for a majority of the EU countries.

Germany was also the largest importer of motor cars among the EU countries in 2024 (see Table 6); it accounted for 25.8% of imports from outside the EU, followed by Belgium (24.7%). The largest share of German extra-EU imports originated from the United States, while Germany was the main origin of imports for Belgium and a large majority of other EU countries.

Exports of motor cars (SITC 781), 2024

	Total exports (€ million)	Share of total goods exported (%)	Extra-EU exports (€ million)	Share of extra-EU exports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	165 214	6.4	165 214	100.0			United States	38 932
Belgium	37 703	7.6	7 066	4.3	Germany	7 405	United Kingdom	2 266
Bulgaria	315	0.7	235	0.1	Germany	45	Türkiye	86
Czechia	31 821	13.1	8 954	5.4	Germany	7 223	United Kingdom	3 716
Denmark	2 554	2.1	170	0.1	Germany	1 441	Switzerland	75
Germany	162 069	10.4	90 405	54.7	France	10 523	United States	25 166
Estonia	828	4.8	90	0.1	Lithuania	384	Hong Kong	21
Ireland	69	0.0	53	0.0	Belgium	12	United Kingdom	51
Greece	43	0.1	6	0.0	Bulgaria	20	United Arab	1
Spain	37 679	9.6	10 382	6.3	France	7 663	United Kingdom	4 224
France	21 035	3.6	6 012	3.6	Belgium	3 363	United Kingdom	1 896
Croatia	290	1.2	104	0.1	Germany	76	Switzerland	5
Italy	14 952	2.4	8 122	4.9	Germany	2 155	United States	3 380
Cyprus	0	0.0	2	0.0	none	0	Thailand	1
Latvia	401	2.1	7	0.0	Lithuania	216	Ukraine	1
Lithuania	701	1.9	369	0.2	Poland	75	Ukraine	23
Luxembourg	797	5.3	62	0.0	Belgium	308	United Arab	11
Hungary	10 595	7.3	2 957	1.8	Germany	2 415	United States	722
Malta	0	0.0	3	0.0	none	0	United Kingdom	1
Netherlands	7 523	0.9	2 234	1.4	Belgium	2 021	United Kingdom	1 444
Austria	7 563	3.8	3 115	1.9	Germany	1 371	United States	997
Poland	6 680	1.9	1 740	1.1	Italy	1 436	Ukraine	470
Portugal	4 141	5.2	1 247	0.8	Germany	1 150	United Kingdom	626
Romania	7 402	8.0	1 479	0.9	France	1 250	Türkiye	725
Slovenia	6 730	9.2	1 193	0.7	Germany	1 332	Türkiye	471
Slovakia	29 377	27.5	12 386	7.5	Germany	7 085	United States	3 155
Finland	1 088	1.5	96	0.1	Germany	665	Norway	36
Sweden	14 055	7.8	6 723	4.1	Germany	1 692	United States	3 531

Note: main destination of exports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)

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Table 5: Exports of motor cars (SITC 781), 2024 Source: Eurostat (ds-059331)

Imports of motor cars (SITC 781), 2024

	Total imports (€ million)	Share of total goods imported (%)	Extra-EU imports (€ million)	Share of extra-EU imports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	75 960	3.1	75 960	100.0			China	12 712
Belgium	40 462	8.5	18 779	24.7	Germany	7 714	Japan	5 922
Bulgaria	1 666	3.4	273	0.4	Germany	449	Türkiye	84
Czechia	6 383	3.0	1 119	1.5	Germany	1 811	Japan	499
Denmark	7 261	6.4	463	0.6	Germany	3 517	South Korea	128
Germany	65 999	5.0	19 609	25.8	Czechia	7 722	United States	6 540
Estonia	1 739	8.4	85	0.1	Sweden	520	China	38
Ireland	3 986	3.0	1 092	1.4	Germany	1 076	United Kingdom	532
Greece	2 835	3.3	622	0.8	Germany	903	Türkiye	164
Spain	22 364	5.1	8 763	11.5	Germany	5 869	China	2 170
France	40 881	5.9	5 697	7.5	Germany	11 708	Türkiye	1 759
Croatia	2 151	5.0	73	0.1	Germany	608	China	26
Italy	33 857	6.0	7 089	9.3	Germany	10 255	Türkiye	1 667
Cyprus	707	5.7	400	0.5	Germany	139	Japan	213
Latvia	1 009	4.6	54	0.1	Germany	467	United Kingdom	46
Lithuania	1 778	4.3	113	0.1	Estonia	467	United States	78
Luxembourg	2 278	9.8	17	0.0	Belgium	1 229	United Kingdom	15
Hungary	4 409	3.2	726	1.0	Germany	1 344	South Korea	283
Malta	239	2.7	93	0.1	Germany	61	Japan	43
Netherlands	19 074	2.5	3 391	4.5	Germany	7 575	United Kingdom	839
Austria	10 802	5.5	319	0.4	Germany	4 991	United Kingdom	228
Poland	17 370	16.2	1 095	1.4	Germany	6 599	South Korea	354
Portugal	6 732	6.3	733	1.0	Spain	1 988	United Kingdom	218
Romania	4 388	3.5	781	1.0	Germany	1 265	Morocco	215
Slovenia	5 579	7.1	3 143	4.1	Germany	950	Türkiye	1 781
Slovakia	3 737	3.6	77	0.1	Czechia	1 046	South Korea	40
Finland	3 687	4.9	321	0.4	Germany	1 320	South Korea	126
Sweden	9 587	5.5	1 033	1.4	Germany	3 165	South Korea	336

Note: main origin of imports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)



Table 6: Imports of motor cars (SITC 781), 2024 Source: Eurostat (ds-059331)

Apparel and clothing accessories

The apparel and clothing accessories industry is another interesting case-study in terms of the impact of globalisation. It is characterised by distant supply chains, with subcontractors manufacturing large quantities of mass-produced clothing (often with very low labour costs); even high-end production, such as designer clothes, are predominantly manufactured away from their country of design, although their manufacture may be closer to home (for example, in other European countries with lower labour costs).

Consumers are generally considered to have benefited from the impact of globalisation in the clothing industry, as prices have been kept extremely low and a wide-range of ever-changing fashions are rapidly made available on the high street. On the other hand, the relocation of the clothing industry towards emerging and subsequently developing economies, principally in Asia, led to widespread job losses in Europe (and North America).

As with the iron and steel industry, the clothing sector is also characterised by overcapacity, which some manufacturers may use to their advantage in order to apply downward pressure on prices agreed with subcontractors. While China and India were at the forefront of the initial relocation of the clothing industry, the situation has subsequently evolved, with India specialising in high-end textiles and Chinese investment often being directed towards establishing new manufacturing facilities in countries such as Bangladesh, Sri Lanka, Vietnam, Laos or Cambodia.

The largest destinations of EU exports of articles of apparel and clothing accessories were Switzerland (15.3%), the United Kingdom (12.8%) and the United States (12.6%) - see Figure 15.

China was the main origin of EU imports for articles of apparel and clothing accessories, its share of the EU import market rose from 23.4% in 2002 to 28.7% in 2024 (see Figure 16). Türkiye was the only other partner to record a double-digit share (10.5%), while India (5.0%) had the third highest share. A relatively high share of EU imports (48.2%) originated from the rest of the world, suggesting that the manufacture of clothing was being relocated to a

wide range of developing countries.

Figure 15Figure 16In 2024, the EU ran a large trade deficit (€ 32 billion) for articles of apparel and clothing accessories. The principal export markets for EU countries were other EU countries or nearby non EU countries such as Switzerland, Norway and the United Kingdom. Croatia (4.9%) was the EU country with the highest share for articles of apparel and clothing accessories in total exports (see Table 7).

China was the main origin of apparel and clothing accessory imports for 8 of the EU countries. However, when considering only extra-EU partners, China was the main origin for 24 of the EU countries. Germany, France, Spain and the Netherlands were the only EU countries to import more than € 10 billion of apparel and clothing accessories from countries outside the EU, in 2024. When considering total (extra-EU + intra-EU) imports, Italy and Poland also imported more than € 10 billion (see Table 8).

Exports of articles of apparel and clothing accessories (SITC 84), 2024

	Total exports (€ million)	Share of total goods exported (%)	Extra-EU exports (€ million)	Share of extra-EU exports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	39 922	1.5	39 922	100.0			Switzerland	6 098
Belgium	8 300	1.7	649	1.6	France	1 796	United Kingdom	212
Bulgaria	1 150	2.7	128	0.3	Germany	232	United Kingdom	43
Czechia	3 590	1.5	352	0.9	Germany	1 899	China	174
Denmark	5 011	4.1	537	1.3	Germany	1 463	Norway	180
Germany	27 687	1.8	6 149	15.4	Poland	5 033	Switzerland	3 425
Estonia	186	1.1	36	0.1	Finland	33	Norway	19
Ireland	396	0.2	263	0.7	Spain	46	United Kingdom	239
Greece	720	1.4	198	0.5	Germany	89	United Kingdom	29
Spain	14 701	3.7	2 977	7.5	France	2 339	Türkiye	802
France	15 580	2.6	7 263	18.2	Italy	1 757	United States	1 282
Croatia	1 175	4.9	237	0.6	Italy	308	Russia	70
Italy	27 948	4.5	14 669	36.7	France	3 777	United States	2 455
Cyprus	0	0.0	6	0.0	none	6	United States	1
Latvia	369	1.9	193	0.5	Estonia	39	Russia	170
Lithuania	511	1.4	157	0.4	Denmark	69	Norway	31
Luxembourg	73	0.5	15	0.0	Germany	23	Hong Kong	4
Hungary	1 025	0.7	125	0.3	Italy	148	United States	12
Malta	0	0.0	4	0.0	none	1	United States	1
Netherlands	17 818	2.1	1 771	4.4	Germany	5 368	United Kingdom	734
Austria	2 839	1.4	251	0.6	Germany	1 057	Switzerland	108
Poland	13 255	3.8	1 787	4.5	Germany	5 513	Ukraine	495
Portugal	3 311	4.2	663	1.7	Spain	916	United Kingdom	247
Romania	2 235	2.4	260	0.7	Italy	729	United Kingdom	74
Slovenia	649	0.9	58	0.1	Hungary	159	United States	5
Slovakia	1 483	1.4	63	0.2	Czechia	369	Switzerland	24
Finland	275	0.4	54	0.1	Germany	44	Norway	8
Sweden	2 888	1.6	1 056	2.6	Finland	410	Norway	634

Note: main destination of exports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)

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Table 7: Exports of articles of apparel and clothing accessories (SITC 84), 2024 Source: Eurostat (ds-059331)

Imports of articles of apparel and clothing accessories (SITC 84), 2024

	Total imports (€ million)	Share of total goods imported (%)	Extra-EU imports (€ million)	Share of extra-EU imports (%)	Main intra EU partner	Value main intra EU partner (€ million)	Main extra EU partner	Value main extra EU partner (€ million)
EU (*)	90 059	3.7	90 059	100.0			China	25 816
Belgium	7 789	1.6	3 877	4.3	Germany	1 143	China	935
Bulgaria	932	1.9	203	0.2	Poland	162	Türkiye	100
Czechia	4 278	2.0	827	0.9	Germany	1 026	China	266
Denmark	5 121	4.5	3 093	3.4	Germany	424	China	1 072
Germany	41 929	3.2	20 519	22.8	Poland	5 795	China	5 217
Estonia	382	1.8	39	0.0	Poland	67	China	17
Ireland	3 011	2.3	2 069	2.3	Netherlands	196	China	599
Greece	2 329	2.7	569	0.6	Spain	452	China	227
Spain	20 798	4.8	13 346	14.8	Italy	1 588	China	3 285
France	25 175	3.6	12 182	13.5	Italy	3 372	China	3 936
Croatia	1 968	4.5	491	0.5	Italy	435	China	46
Italy	18 685	3.3	9 130	10.1	Spain	2 165	China	2 551
Cyprus	417	3.4	41	0.0	Italy	108	China	16
Latvia	555	2.5	39	0.0	Germany	116	Ukraine	12
Lithuania	633	1.5	84	0.1	Poland	197	China	37
Luxembourg	381	1.6	16	0.0	Germany	96	China	3
Hungary	1 828	1.3	384	0.4	Germany	290	China	133
Malta	169	1.9	77	0.1	Italy	38	China	43
Netherlands	19 349	2.6	12 237	13.6	Germany	3 038	China	3 951
Austria	7 597	3.9	1 013	1.1	Germany	3 863	China	248
Poland	15 680	14.6	4 724	5.2	Germany	5 006	China	1 397
Portugal	3 284	3.1	554	0.6	Spain	1 715	China	222
Romania	2 884	2.3	707	0.8	Poland	592	China	159
Slovenia	1 013	1.3	416	0.5	Germany	173	China	112
Slovakia	2 078	2.0	314	0.3	Germany	787	Türkiye	73
Finland	1 412	1.9	369	0.4	Sweden	350	China	197
Sweden	5 089	2.9	2 739	3.0	Denmark	487	China	1 058

Note: main origin of imports is based on a selected list of partners (see methodological notes in the introduction for more details).

(*) Extra-EU trade only.

Source: Eurostat (online data code: ds-059331)



Table 8: Imports of articles of apparel and clothing accessories (SITC 84), 2024 Source: Eurostat (ds-059331)

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