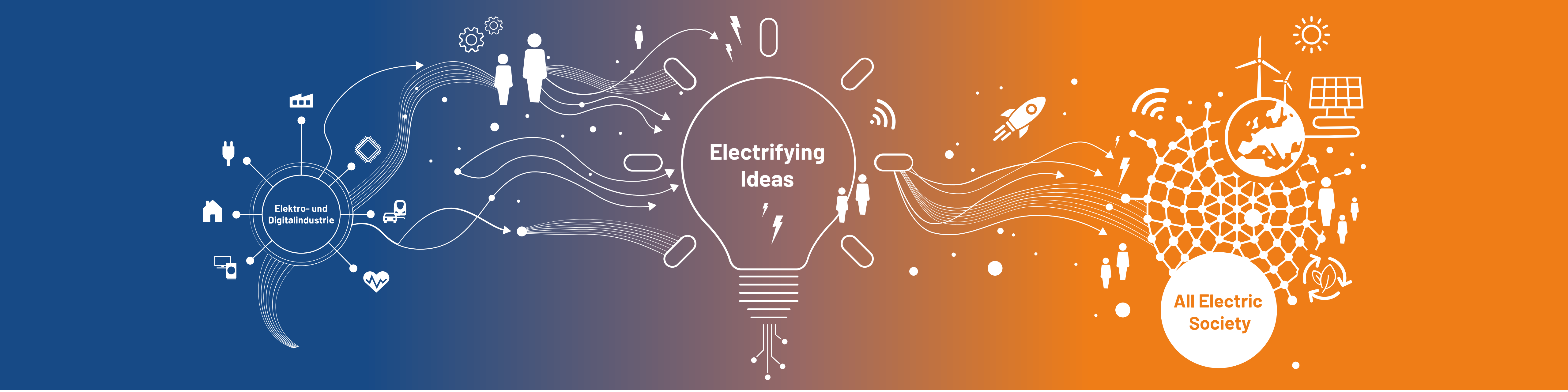
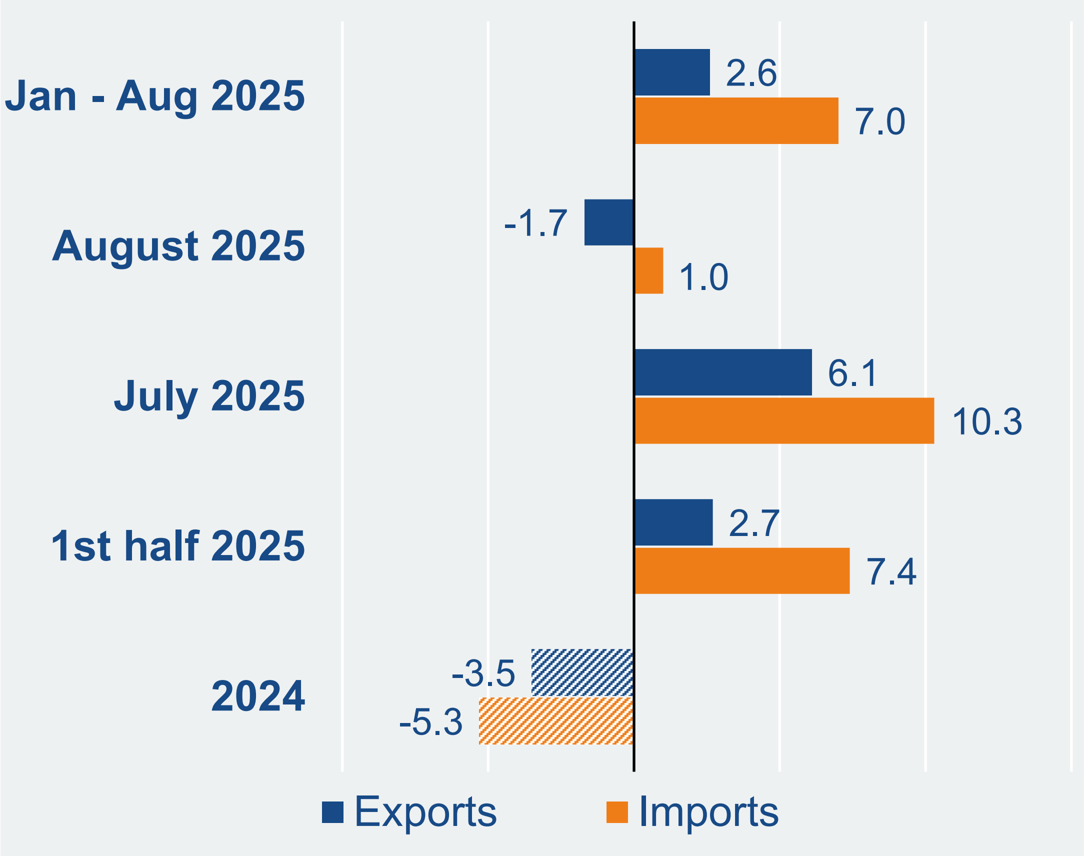


ZVEI Foreign Trade Report

– Edition October 2025

German electro and digital industry
– Exports and imports

% change on year earlier



Source: Destatis and ZVEI’s own calculations

Exports of the German electro and digital industry missed their previous year’s level in **August 2025**. They were down 1.7%, reaching a value of €18.3bn. Weaker exports to both of our biggest customer countries China and the USA contributed significantly to the decline.

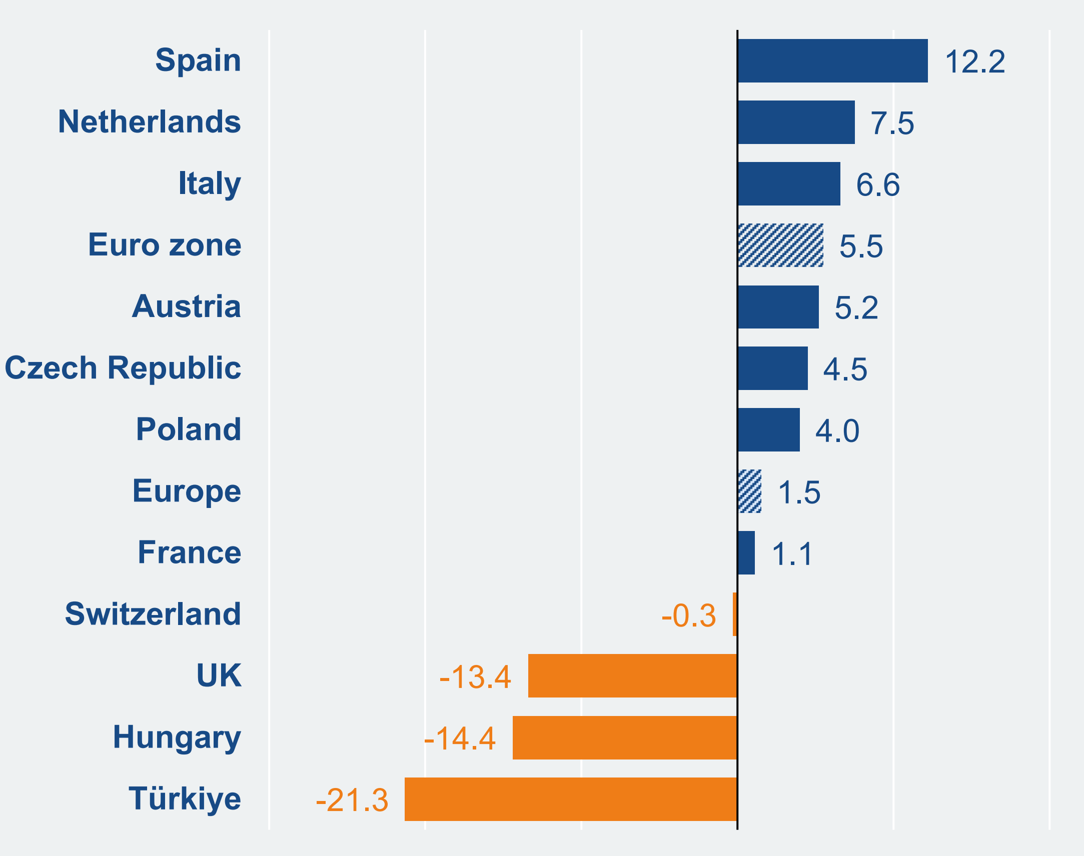
From January through August 2025, electro exports totaled €168.4bn – a 2.6% increase compared to the same period a year earlier.

Imports of electrical and electronic goods to Germany increased slightly in August. They rose by 1.0% (year over year) to €18.9bn. For the first eight months of this year, an import value of €177.0bn is reported and, therewith, a 7.0% year-on-year increase.

Accordingly, the **sector-specific trade deficit** for the first eight months of this year stands at €8.6bn now.

German electro and digital industry
– Exports to Europe

August 2025, % change on year earlier



Source: Destatis and ZVEI's own calculations

In August 2025, the German electro and digital industry delivered €11.1bn worth of goods to **Europe**, representing a 1.5% increase compared to the preceding year. Exports to the **euro zone** grew by a stronger 5.5%, reaching €5.6bn.

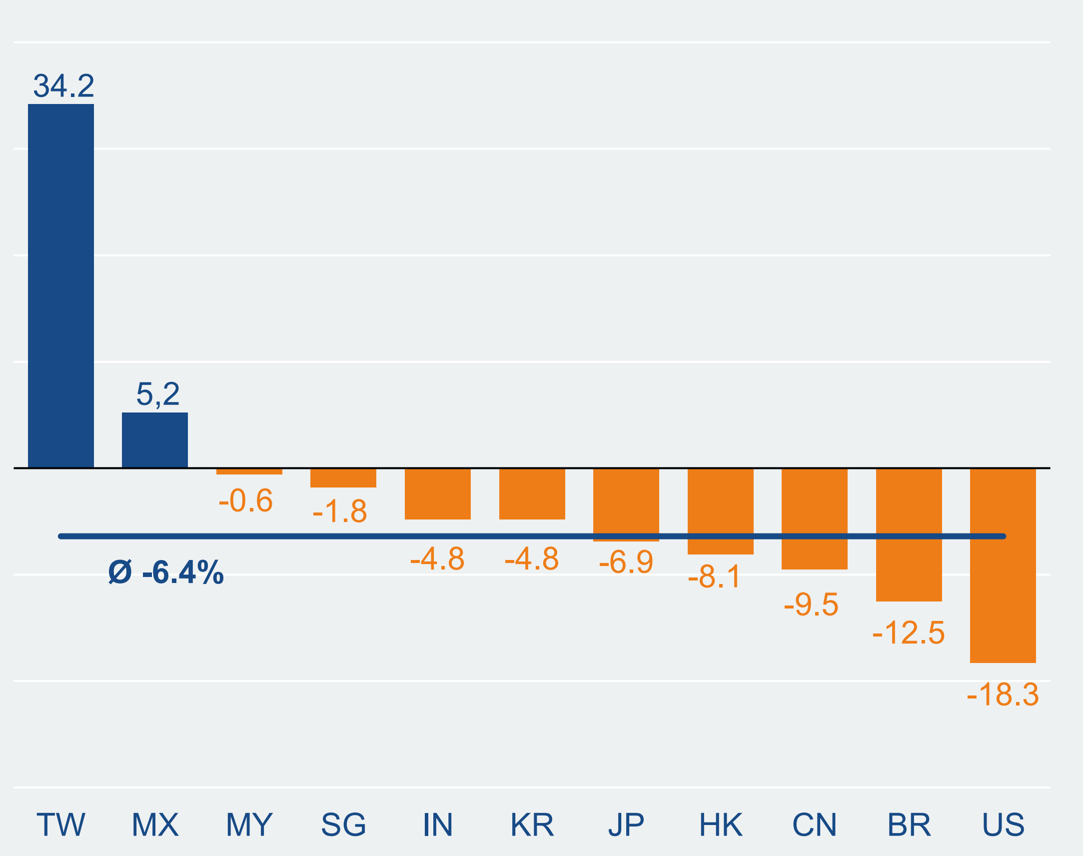
Exports to Spain grew at a double-digit rate of 12.2% to €626m. Deliveries to the **Netherlands** (+7.5% to €1.1bn), Italy (+6.6% to €645m), Austria (+5.2% to €757m), the Czech Republic (+4.5% to €818m), Poland (+4.0% to €933m) and **France** (+1.1% to €1.0bn) also increased in August.

Against it, a slight decline was reported for the sector's exports to Switzerland (-0.3% to €565m). More pronounced setbacks were seen in deliveries to the UK (-13.4% to €655m), Hungary (-14.4% to €565m) and Türkiye (-21.3% to €336m), each falling by double-digit rates.

After the **first eight months of this year**, German electro exports to **Europe** totaled €106.8bn, a 5.0% increase over the same period of last year. Deliveries to the **euro area** increased as well (+4.5% to €56.5bn).

German electro and digital industry
– Exports to third countries (outside Europe)

August 2025, % change on year earlier



Source: Destatis and ZVEI's own calculations

German electro exports to **countries outside Europe** fell by 6.4% (year-on-year) in **August 2025** to a value of €7.2bn.

With it, exports to Taiwan surged by 34.2% to €307m. Deliveries to Mexico also exceeded their previous year's level (+5.2% to €294m).

However, electro exports to Malaysia (-0.6% to €198m), Singapore (-1.8% to €152m), India (-4.8% to €256m), South Korea (-4.8% to €253m), Japan (-6.9% to €229m), Hong Kong (-8.1% to €155m) and Brazil (-12.5% to €141m) all fell compared to August 2024.

The particularly severe decline in exports to both **China** (-9.5% to €1.8bn) and the **USA** (-18.3% to €1.8bn) was a strong blow. Regarding the latter, it seems that negative tariff as well as exchange rate effects have started to resound more starkly now.

So far this year (from January through August), our industry's exports to countries outside Europe totaled €61.6bn – down 1.6% compared to the same period last year.

German electro and digital industry
– Key figures on foreign trade

	2024	2025 August	2025 Jan - Aug
Exports in total, billion € *(% change on year earlier)*	246.4 (-3.5%)	18.3 (-1.7%)	168.4 (+2.6%)
Top ten receiving countries (2024)			
1. China	25.1 (-1.8%)	1.8 (-9.5%)	15.5 (-11.1%)
2. USA	24.8 (-0.2%)	1.8 (-18.3%)	16.6 (-0.7%)
3. France	15.1 (-5.6%)	1.0 (+1.1%)	9.5 (+0.4%)
4. Netherlands	14.9 (-8.2%)	1.1 (+7.5%)	9.6 (+3.3%)
5. Poland	11.8 (-5.7%)	0.9 (+4.0%)	7.8 (+10.9%)
6. Italy	11.0 (-12.6%)	0.6 (+6.6%)	7.2 (+5.5%)
7. Czech Republic	10.4 (-0.4%)	0.8 (+4.5%)	6.7 (+5.7%)
8. Austria	10.3 (-10.1%)	0.8 (+5.2%)	6.8 (+7.2%)
9. United Kingdom	9.1 (-4.6%)	0.7 (-13.4%)	6.7 (+8.1%)
10. Spain	9.0 (+0.9%)	0.6 (+12.2%)	6.2 (+14.9%)

Source: Destatis and ZVEI’s own calculations

	2024	2025 August	2025 Jan - Aug
Imports in total, billion € (% change on year earlier)	254.9 (-5.3%)	18.9 (+1.0%)	177.0 (+7.0%)
Biggest supplying countries (2024)			
1. China	75.3 (-5.6%)	5.8 (+0.3%)	51.3 (+6.6%)
2. Hungary	14.4 (-7.9%)	1.1 (-1.1%)	10.2 (+8.7%)
3. Poland	13.6 (-11.4%)	0.9 (-19.5%)	8.2 (+1.8%)
4. Czech Republic	13.5 (-1.3%)	1.1 (+1.6%)	9.4 (+19.8%)
5. USA	12.6 (-7.3%)	1.1 (+5.6%)	9.0 (+13.3%)
6. Taiwan	9.1 (-11.3%)	0.7 (+5.7%)	6.5 (+8.8%)
7. Malaysia	6.9 (-7.5%)	0.5 (-1.1%)	4.5 (+0.8%)
Export prices	+0.7%	±0.0%	+0.3%
Import prices	-2.0%	-2.3%	-1.7%

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