Task force on import surveillance

Explanatory note accompanying the publication of the 2nd edition of trade monitoring results published on 4 July 2025

1. Background

The import surveillance task force was first announced by President von der Leyen on 7 April 2025 to monitor imports in order to detect harmful trade diversion into the EU. Commission services have elaborated an automated dashboard that monitors import trends closely so that any surge can be identified quickly and compared with complementary data.

The Commission encourages industry stakeholders to review the results and provide further market intelligence that will help the Commission services to assess which products may need protection through targeted, proportionate and timely action, while avoiding any unintended effects on other producers downstream.

2. Methodology

The list of "hits" generated by the dashboard identifies products that may be at risk of harmful import increases. "Hits" are generated for products for which all of the following criteria are met: (1) a change in 2025 import patterns regarding quantity compared to established patterns since 2023; (2) an increase of 5% in import volumes; (3) a decrease of 5% in average import prices; (4) an average weekly import value of at least EUR 100 000; and (5) existence of production in the EU at a sectoral level.

The product codes are identified at a very detailed level (8-digit level in the customs nomenclature). The data are collected from the "Surveillance" database and cover imports from the beginning of 2023 until the end of May 2025. The change rates reported in the list of 'hits' on which this explanatory note is based compare import data of the period 1 January 2025 – 31 May 2025 with the same period in 2024.

3. Assessment of 2nd edition results

As a general comment, it should be noted that it is normal for imports to fluctuate significantly from one month to another. Trade in certain products follows a seasonal pattern, and for others the precise time of customs clearance of large individual shipments may impact statistics. In addition, import volumes from certain key trading partners have historically portrayed significant monthly variation. Indeed, in the context of investigations for potential protective measures, it is necessary to examine trends as opposed to short-term fluctuations of imports.

Additionally, the continuously shifting landscape of measures, countermeasures, postponements, and deals means that the factors driving trade diversion are constantly evolving. Even when these drivers are in place, trade diversion will inevitably take several

weeks to materialise. For an exporter to start shipping its product to the EU, it will first need to find an importer established in the EU and agree on a commercial contract with it. The rush to export goods to the US before the tariffs kicked in will in all likelihood have depleted inventories of companies exporting to the US. For certain products, there may also be European certification requirements to fulfil, and such requirements may differ from those in other markets (e.g. the US). Therefore, it might take considerable time for potential shifts in trade flows to show in the data.

Against this background, a "hit" is generated in the current period for 85 product codes out of a total 9,525 8-digit product codes in the EU nomenclature, representing additional 30 codes compared to the previous list: 41 new codes have been added, and 11 codes present on the previous list have now disappeared. The appearance of additional codes seems to reflect a statistical effect where more recent data allows the system to detect deviations from the expected pattern, mostly in earlier months. As for the codes that have disappeared, the automated system either concluded on the basis of the new data that the trade flow did not deviate from past patterns or calculated that these codes did not fulfil the analysis criteria. For instance, four codes of the previous list disappeared because they now are below the 100.000 EUR filter, and for two codes the decrease in price is now below 5% compared to 2024.

Most of these 85 product codes fall under the following main product groups (or ecosystems of supply chains): energy intensive industries (27), textiles (17), electronics (13), mobility-automotive (11) and agrifood (10). In terms of the NACE nomenclature, the most prevalent categories are manufacturing of: textiles (17), chemicals (12), and machinery (11) followed by metals (8), food products (7), electrical equipment (6) and transport equipment (6). The analysis is done on the number of hits per sector, which gives an indication of market trends. Even increases in imports of product codes with generally low levels of imports (in terms of value or quantity) might still be potentially harmful to the respective industry sector.

Comparing the distribution of hits per sector with the previous results list, the increase in hits is focused on chemicals (12 hits, up from 6), machinery (11, up from 5) and basic metals (8, up from 4). Transport equipment also increased but started from a low number of hits (6, up from 2). Textiles increased further from 12 to 17 codes. Most other categories also showed some increase in hits, also in line with the longer period analysed following the general trend of increasing imports over the previous years.

Electrical equipment, textiles, computer related products, machinery, transport equipment and chemicals are the most important categories when ranked on the basis of value. Collectively they account for 90% of the total value of codes. Food and agricultural products generate several hits (10 in total) but are mostly codes with low import values and account for a relatively small share of total value. There are no hits in the "pharma" category, although there are chemicals (2932900; 29349960) related to pharmaceuticals.

The reported percentage increases in volumes appear in some cases remarkably high. This is often generated by a "baseline effect", i.e. an extremely low level of imports in the reference

period in 2024. For instance, for code 72221990 (bars and rods of stainless steel) the average weekly quantity in 2024 was less than 1,5 tonnes, which increased to about 200 tonnes per week in 2025, resulting in a change of more than 15000%. Likewise, for code 44124900 (laminated veneered lumber) the average weekly quantity in 2024 was less than 1 tonne, which increased to about 500 tonnes per week in 2025, resulting in a change of more than 30000%.

Similarly, there are instances with a very significant decrease in price, e.g. 84178030 (ovens and furnaces). This can be explained in some cases by the change in the patterns of goods imported. CN codes might cover different products and in the absence of detailed information from the industries concerned, it is not possible to ascertain whether the prices decrease is driven by qualitative differences in the imported goods. Thus, a significant increase in volume of lower priced goods, e.g. non-branded goods, under a code where previously only highly priced "branded" goods were imported, may lead to a significant decrease in price.

It should also be noted that, in certain cases, import volumes may also be revised (downwards or upwards) in the final statistics, as compared to the initial numbers reflected in the Surveillance system.

In order to draw further conclusions on whether such increases are abnormal or whether they might result in difficulties for EU producers of the same products, the Commission services invite EU producers to share their detailed knowledge of the market realities for individual products.

The whole list of "hits" is provided as an annex. The annex also indicates how the current list evolves from the previous one.

4. Next steps

The Commission services publish the list of "hit" every month and will analyse any feedback from EU industry or Member States following the publication of such list.