

Market evolution: Aircraft and spacecraft (CN 88) — 2015–2025

Introduction

This report analyses the European Union’s extra-EU trade in “Aircraft, spacecraft, and parts thereof” (CN 88) from 2015 to 2025. Drawing on the General Overview, Product Breakdown and Volatility & Shocks data, the report identifies three main dynamics: a resilient trade surplus built on sharply diverging value and volume trends; a profound reorientation of partner-country flows driven by geopolitics and strategic demand; and a technological revolution in the product mix, with drones and parts reshaping the sector’s profile. All figures are drawn exclusively from the dataset and are cited using the ready-made dashboard links.

A shrinking but robust surplus with contrasting price-volume paths

Headline trade recovered strongly from its 2020 trough and reached historic highs by 2025, yet the surplus narrowed because import growth far outpaced exports.

Between 2015 and 2025, EU exports of aircraft and spacecraft rose from €67.52 billion to €75.27 billion (+11.5%), while imports climbed from €30.31 billion to €45.07 billion (+48.7%). The trade balance consequently contracted from €37.21 billion to €30.20 billion (–18.8%). The pandemic caused a severe contraction in 2020—exports fell to €45.50 billion, imports to €24.62 billion—but both flows subsequently recovered. By 2025, exports and imports reached their highest values in the series. Despite the narrowing surplus, the EU remained a net exporter of high-value aerospace goods.

Indicator	2015	2025	Change
Exports (€ bn)	67.52	75.27	+11.5%
Imports (€ bn)	30.31	45.07	+48.7%
Trade balance (€ bn)	37.21	30.20	–18.8%
Export quantity (k units)	97.6	146.7	+50.3%
Import quantity (k units)	104.1	82.3	–20.9%
Export unit price (€)	691,088	493,203	–28.6%
Import unit price (€)	291,326	536,619	+84.2%

Source: General Overview.

A profound divergence in unit values explains the headline trends: export prices fell while import prices nearly doubled.

Over the period, the average export price fell by 28.6% (from €691 thousand to €493 thousand per unit), even though the number of exported items surged by 50.3%. Conversely, import volumes contracted by 20.9% but the average import price jumped by 84.2% (from €291 thousand to €537 thousand per unit). This opposite movement points to a shift in the composition of trade: the EU shipped more lower-unit-value items such as parts and drones, while it imported more expensive finished aircraft and high-value components.

Geopolitical turbulence and the reshaping of partner landscapes

The United States remained the dominant partner, but its share is being challenged by surging trade with China, India, and uncategorised destinations.

The Top Partners data illustrate a markedly changing map. On the import side, the US expanded its lead (€18.29 bn → €24.76 bn, +35.4%), but imports from China skyrocketed from €0.37 bn to €2.58 bn (+590%). Trade with partners “not specified for commercial or military reasons” exploded: imports rose from €0.07 bn to €1.93 bn (+2,741%), exports from €0.05 bn to €4.61 bn (+8,861%). Exports to India more than quadrupled to €4.70 bn, and shipments to the UK grew by 27.6% to €6.19 bn, while exports to the United Arab Emirates fell by 28.4%. Concentration metrics confirm the broadening of trade: the Market Concentration value HHI declined by 13.3% for imports and by 12.1% for exports, indicating moderately more diversified sourcing and destination markets.

Imports by partner (€ bn)	2015	2025	Exports by partner (€ bn)	2015	2025
United States	18.29	24.76	United States	14.63	13.87
United Kingdom	6.24	6.15	United Kingdom	4.85	6.19
China	0.37	2.58	China	8.90	8.53
Unspecified (mil./comm.)	0.07	1.93	Unspecified (mil./comm.)	0.05	4.61
Canada	1.21	2.88	India	1.11	4.70

Source: Top Partners.

Several supply and price shocks reveal the sector's vulnerability to sanctions, procurement cycles, and commercial disputes.

The Volatility & Shocks analysis identifies numerous events. Exports to Russia suffered a near-total supply shock: after averaging 1,798 units per year from 2015–2022, quantities collapsed to virtually zero from 2023 onward (–99.9%). On the import side, the unit price of UK-origin goods more than doubled in 2017 (€349 thousand vs. a baseline of €166 thousand), partly reflecting post-Brexit contract restructuring and higher-value deliveries. A similar price shock hit Chinese imports in 2019 (+108.9%). Export price shocks were also observed for Canada (+54.2% in 2020), Morocco (+38.0% in 2017) and Japan (+35.7% in 2017), often linked to the delivery of expensive aircraft batches. Quantity volatility was especially high for Canadian imports (coefficient of variation 1.58) and for exports to Switzerland (CV 2.47), underlining the lumpy, project-driven nature of the trade.

The drone revolution and the growing weight of parts trade

The introduction of separate customs codes for parts (8807) and drones (8806) from 2022 illuminates a fundamental product-mix shift.

The Product Breakdown reveals that before 2022, powered aircraft (8802) accounted for nearly all reported trade. Since 2022, parts (8807) and unmanned aircraft (8806) have been separately tracked. In just four years, exports of parts rose from €11.41 billion to €14.95 billion (+31.0%), while drone exports soared from €0.15 billion to €1.42 billion (+877%). Imports followed a similar pattern: parts imports reached €14.98 billion in 2025, and drone imports climbed to €1.36 billion. Meanwhile, conventional powered-aircraft exports grew from €41.48 billion to €54.46 billion (+31.3%), retaining the largest value share.

Heading	Description	Export value (€ bn), 2022	Export value (€ bn), 2025	Import value (€ bn), 2022	Import value (€ bn), 2025
8802	Powered aircraft	41.48	54.46	17.49	26.14
8807	Parts	11.41	14.95	12.45	14.98
8806	Drones	0.15	1.42	0.55	1.36
8805	Launching gear	0.15	0.22	0.14	0.50
8804	Parachutes	0.07	0.06	0.09	0.11
8801	Balloons/ gliders	0.02	0.02	0.01	0.01

Source: Product Breakdown.

The spectacular growth of drone trade explains the collapse in average export unit prices.

In 2022, the export unit price of drones stood at €543 thousand per unit. By 2025, it had plummeted to €26,859 per unit as quantities surged from 268 to 52,900 units. This infusion of low-cost, high-volume systems into the trade basket mechanically dragged down the aggregate export unit price, complementing the growing share of parts trade (which also exhibits a lower average price than finished aircraft). The data therefore link the headline – 28.6% drop in export unit value directly to the massification of drones and the unbundling of aircraft supply chains.

Conclusion

Between 2015 and 2025, extra-EU trade in aircraft and spacecraft demonstrated remarkable resilience: exports and imports both set new records after the 2020 pandemic shock, and the EU maintained a surplus of over €30 billion. However, beneath the surface, the structure of trade changed profoundly. Volume and price moved in opposite directions, reflecting a pivot towards parts and a drone export boom. Partner-country dynamics were redrawn by China's rapid import growth, the emergence of large unidentified flows (likely military and dual-use), and the sudden disappearance of the Russian market. The product mix was transformed by the new visibility of parts and drones, with unmanned aircraft unit prices collapsing as volumes exploded. Taken together, the data portray a sector that is navigating strategic realignments and a technological transition, while preserving its vital contribution to the EU's external trade balance.

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at [this address](#).