Market evolution: Aircraft and spacecraft (CN 8802) — 2015–2025

Introduction

This report analyses the European Union's extra-EU trade in powered aircraft, helicopters and spacecraft (customs code 8802) over the period 2015–2025. Bundling everything from large commercial airliners to satellites and launch vehicles, this heading lies at the heart of the bloc's high-value aerospace sector. The analysis draws on the Trade Dashboard's annual series, highlighting the main shifts in export resilience, import surges, partner realignments and product-mix dynamics.

1 Exports stay broadly stable but soaring import prices slash the trade surplus

Total exports recovered quickly from the pandemic shock while imports more than doubled in value

According to the Overview, EU exports of CN 8802 products stood at €53.5 billion in 2015 and closed the decade just 0.5 % higher at €53.7 billion. The path was not linear: exports fell to a low of €32.6 billion in the pandemic year 2020 before regaining their pre-crisis level by 2024. Imports, by contrast, surged from €13.6 billion to €25.9 billion – a rise of 90.6 %.

The import boom was driven overwhelmingly by rising unit prices

While the quantity of imported aircraft changed little (+2.3 % over the period), the average price per imported unit jumped by 57.1 %. EU exporters saw a far milder price improvement of 5.3 % while actually shipping 12.3 % fewer units. This asymmetry in pricing power left a clear mark on the trade balance.

The trade surplus shrank by one-third

The EU's traditional surplus in this sector narrowed from €39.8 billion in 2015 to €27.8 billion in 2025 – a contraction of 30.2 %.

Indicator (€ m)	2015	2025	Change (%)
Exports	53 453	53 743	+0.5
Imports	13 608	25 931	+90.6
Trade balance	39 846	27 812	–30.2

Source: Overview.

2 Geopolitical pivots and price shocks redraw the partner landscape

The United States remains the dominant partner but the flows evolve differently

The US is by far the largest extra-EU trading partner for this product group. EU imports from the US climbed from €10.5 billion to €18.7 billion (+78 %), while exports to the US edged down from €10.2 billion to €9.5 billion (–7.7 %). (Top Partners)

China’s role shifts, India emerges as a growth export market

EU imports from China multiplied nearly tenfold, from €124 million to €1 124 million (+809 %). On the export side, India became the bloc’s fourth-largest buyer, growing from €876 million to €4 530 million (+417 %). Exports to the United Arab Emirates, in contrast, dropped by 36 % to €4 190 million.

Key export destinations exhibit notable volatility and price shock events

The price-shock analysis in the Shock Events section pinpoints several disruptive episodes:

- The unit price of EU exports to the United States jumped by 82 % in 2022, driven by a mix of product-mix changes and inflationary pressures.
- Exports to Türkiye recorded a 20 % price jump in 2022, followed by sustained higher prices.
- Exports to the United Kingdom saw a 43 % price spike in 2023.

Concentration measures confirm that export markets are well diversified (HHI fell from 904 to 781), while imports remain highly concentrated on the United States (HHI 5 487 in 2025, down from 6 429 in 2015). (Market Concentration)

3 Large aeroplanes anchor the trade, while spacecraft bring disruptive volatility

Aeroplanes above 15 000 kg account for the overwhelming share of exports and imports

The Product Comparison shows that sub-heading 880240 (aeroplanes >15 t) dominates both flows. In 2025, it represented €47.9 billion of EU exports (89 % of the total) and €22.1 billion of imports (85 %). The segment therefore determines the overall trends.

Segment	2025 exports (€ bn)	2025 imports (€ bn)
Aeroplanes >15 t	47.9	22.1
Aeroplanes 2-15 t	2.5	3.3
Helicopters >2 t	1.6	0.4
Helicopters ≤2 t	0.4	0.1
Aeroplanes ≤2 t	0.3	0.1
Spacecraft (incl. satellites)	1.7	0.002

Values rounded; source: Product Comparison.

Smaller aircraft and helicopters show contrasting import dynamics

Imports of medium-weight aeroplanes (2-15 t) surged from €1.1 billion to €3.3 billion, largely because of higher unit prices. Heavy helicopter imports (>2 t) have also trended upwards, reaching €634 million in 2023 before settling at €400 million in 2025. Light helicopters (≤2 t) ballooned in value from €63 million to €139 million despite falling quantities, reflecting a sharp price increase — a phenomenon that the Volatility analysis flags as a price shock for Chinese imports in 2019.

Spacecraft trade is lumpy and driven by large individual contracts

Spacecraft exports (including satellites and launch vehicles) oscillated between €0.2 billion and €1.8 billion without a clear trend, reflecting the project-based nature of the industry. The segment is the main source of outlier volatility in the total export series.

Conclusion

The EU's extra-EU trade in aircraft and spacecraft between 2015 and 2025 reveals a resilient export engine that weathered the 2020 contraction but lost ground in trade balance terms as import values surged, driven by strong price increases on large aeroplanes and helicopters from the United States and, increasingly, China. Partner geography shifted notably, with India growing into a top-tier export market and the UAE losing share, while price shocks hit several key bilateral corridors after 2021. By product, the heavy-aircraft segment remains overwhelmingly dominant, but the growing import bill for smaller aircraft and the erratic swings in spacecraft deliveries inject volatility into the bloc’s aerospace trade account.

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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.