Market evolution: Aircraft parts (CN 8807) — 2015–2025

Introduction

This report examines the European Union’s extra-EU trade in aircraft and spacecraft parts under customs code 8807 (“Parts of aircraft and spacecraft of heading 8801, 8802 or 8806, n.e.s.”). The analysis covers the years 2022 to 2025, the full-year window available in the data. The heading bundles four sub-codes: propellers and rotors (880710), under-carriages (880720), parts of aeroplanes, helicopters or unmanned aircraft (880730), and other parts n.e.s. (880790).

Over the period, the EU’s trade in these high-value components expanded robustly, while its chronic trade deficit all but disappeared. The following sections examine the main dynamics behind this transformation.

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1. From chronic deficit to near balance

The EU’s trade deficit shrank by more than 97 %, moving the bloc close to equilibrium

In 2022 the EU recorded a deficit of € 1.02 billion in aircraft parts. By 2025 that deficit had contracted to just € 0.027 billion – a change of +97.3 %. This shift was driven by exports growing faster than imports: export value rose 31.0 % (from € 11.41 bn to € 14.95 bn), while import value increased 20.4 % (from € 12.44 bn to € 14.97 bn).

Trade overview

Export volumes grew faster than imports, but unit prices rose more sharply on the export side

Export quantity climbed 20.9 % (from 31 966 t to 38 646 t), whereas import quantity increased 17.6 % (from 40 875 t to 48 079 t). Consequently, the average export price per tonne went up 8.3 % (from € 357 007 to € 386 708) while the import price edged up only 2.3 % (from € 304 262 to € 311 412). This suggests that EU manufacturers not only raised volumes but also moved towards higher-value products or better-priced contracts relative to what the EU was buying from abroad.

The improvement was broad-based, but a few large exporters drove the EU's performance

The EU's own top-exporting member states – notably Germany (+42.0 %), Poland (+70.5 %), Austria (+56.6 %) and Spain (+35.4 %) – recorded large gains. France, the leading exporter, grew 19.1 %. On the import side, the Netherlands was the only major member state to see a sharp decline (−35.2 %), while Germany (+34.3 %), Poland (+53.3 %) and Spain (+35.3 %) increased their intake.

Top reporters by value

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2. A concentrated partner landscape with pockets of diversification

The United States and the United Kingdom dominate both flows, but export concentration is eroding

The import market remains highly concentrated: the US and the UK together supplied around three-quarters of extra-EU imports in 2025, and the import HHI value stayed above 2 900 points. Export concentration, by contrast, fell noticeably: the export HHI value dropped from 1 629 to 1 433 (−12.0 %), signalling a more balanced partner mix.

Concentration HHI

China, Canada and Brazil are the fastest-growing export destinations

EU exports to China surged 46.5 % in value, to Canada 37.5 % and to Brazil 34.9 %. The United Kingdom (+34.6 %) also outpaced the average, while the United States (+15.0 %) grew more moderately. On the import side, Türkiye (+44.1 %) and Tunisia (+29.7 %) recorded the strongest increases outside the traditional core suppliers.

Top partners by value

Specialised EU member states cluster around large aerospace hubs, while others are marginal players

In 2025 France (RSCA 0.60), Malta (0.35), Germany (0.33), Spain (0.27) and Croatia (0.20) exhibited the strongest revealed symmetric comparative advantage in aircraft parts. These countries concentrate a large share of the relevant infrastructure and skilled labour. Conversely, many smaller economies – Estonia, Cyprus, Slovakia, Ireland – record extremely low specialisation, indicating limited participation in this capital- and technology-intensive sector.

Most specialised reporters

3. Product mix: aerostructures lead, under-carriages close the gap

Parts of aeroplanes and helicopters (880730) remain the dominant segment for both exports and imports

Sub-code 880730 accounted for the bulk of trade: export value rose from € 8.14 bn to € 10.63 bn, import value from € 9.51 bn to € 11.51 bn. Export unit prices for this segment increased, reaching € 416 294/t in 2025, well above the import price of € 340 121/t, illustrating a quality or technology premium enjoyed by EU producers.

Product segment comparison

Under-carriages (880720) evolved from deficit to surplus, while propellers (880710) expanded steadily

Exports of under-carriages grew from € 1.89 bn to € 2.62 bn, overtaking imports (€ 2.19 bn in 2025) and yielding a small surplus. Propellers and rotors, though a minor segment in value terms, saw exports increase 17.8 % in value and 45.1 % in quantity, while imports remained flat. The “other parts” category (880790) also swung to a surplus as exports jumped 23.1 % while imports barely changed.

Volatility in certain partner-product flows points to potential supply-chain disruptions

Although no major shocks were formally detected, the coefficient of variation of import quantities highlights some unstable streams: imports from Mexico (CV 0.306), Canada (0.236) and China (0.236) were particularly erratic. On the export side, sales to the United Arab Emirates (0.213) and China (0.193) showed the highest variability, while flows to the US and the UK remained relatively stable.

Volatility bars

Conclusion

The EU’s extra-EU trade in aircraft parts transitioned from a deficit of more than € 1 billion to near-zero balance in just four years. This transformation reflected stronger export growth, particularly to China, Canada and Brazil, and an increasing ability of EU firms to command higher unit prices than their foreign suppliers. While the import side remains dominated by the US and the UK, export markets are diversifying. The product breakdown confirms that aerostructures (880730) dominate, but under-carriages have become a source of net surplus. Looking ahead, supply stability from volatile partners such as Mexico and China will require monitoring, but the EU's overall competitive position in aircraft parts appears to have materially strengthened.

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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.