EU TRADE EXPLORER

Market evolution: Bicycle and motorcycle parts (CN 8714) — 2015–2025

Introduction

The EU's trade in parts and accessories for motorcycles, bicycles, and carriages for disabled persons (CN 8714) underwent a profound transformation between 2015 and 2025. While the value of both imports and exports expanded, the driving forces and geographical patterns diverged sharply. Import growth was almost entirely price-driven, while export growth reflected both price increases and a gradual reorientation of destinations. This report analyses the main dynamics using customs data, highlights the structural shifts in the EU's supplier and customer base, and identifies the key volatility episodes that shaped the market.

1. The import price explosion masks a shrinking physical base

The EU's external deficit widened by 60 % as import values rose much faster than exports

The EU's trade balance in CN 8714 deteriorated significantly. In 2015 the deficit stood at –€2.47 bn; by 2025 it had grown to –€3.96 bn, a worsening of 60.1 % Trade overview. The peak deficit was recorded in 2022 at –€7.76 bn, following an extraordinary spike in import values. Over the full period, import value rose by 51.9 % while export value increased by 32.9 %, causing the gap to open further.

Trade flow (€ bn)	2015	2025	Change
Imports	3.54	5.37	+51.9 %
Exports	1.07	1.42	+32.9 %
Balance	–2.47	–3.96	–60.1 %

Imports became dramatically more expensive while the tonnage contracted

The import bill rose despite a fall in physical volumes. Import quantity declined from 242.5 thousand tonnes in 2015 to 215.7 thousand tonnes in 2025 (–11.1 %), whereas the average import price surged from €14.6 thousand per tonne to €24.9 thousand per tonne (+70.8 %). Export prices also increased (+29.0 %), but export volumes remained nearly flat

(+3.0 %). The EU therefore paid substantially more for a smaller quantity of imported goods.

China and Taiwan remain dominant suppliers, but the Asian footprint diversified

Despite the price surge, the top import sources stayed heavily concentrated. China remained the largest supplier, with imports rising from €1.09 bn to €1.95 bn (+78.7 %), and Taiwan followed from €1.00 bn to €1.50 bn (+49.4 %) Top partners. Viet Nam and India recorded the fastest growth (+149.6 % and +152.4 % respectively), although from lower bases, illustrating a gradual diversification of sourcing.

Top import partners (€ m)	2015	2025	Change
China	1 091	1 949	+78.7 %
Taiwan	1 002	1 498	+49.4 %
Viet Nam	114	284	+149.6 %
Japan	575	707	+23.1 %
India	42	105	+152.4 %

The 2022 spike and subsequent correction highlight a one-off supply crunch

Import values peaked in 2022 at €9.35 bn, more than double the 2019 level, driven mainly by Chinese and Taiwanese shipments. After 2022, values retreated to €5.37 bn in 2025, yet remained well above pre-pandemic levels. The correction was largely price-related; volumes also fell sharply after 2022, indicating that the 2020–2022 period saw a temporary supply-chain bottleneck and speculative pricing that unwound in subsequent years.

2. Export markets reorient while price shocks reshape bilateral flows

The United States displaced the United Kingdom as the EU's leading export destination

The geography of EU exports changed markedly. The United Kingdom, the top destination in 2015 (€239 m), shrank by 25.2 % to €179 m. Meanwhile, exports to the United States grew by 38.4 % to €294 m, making it the largest single market. Shipments to Thailand (+92.4 %), Brazil (+50.9 %), Norway (+68.5 %), and especially China (+409.3 %) all expanded considerably, compensating for the UK's decline.

Top export partners (€ m)	2015	2025	Change
United States	212	294	+38.4 %
United Kingdom	239	179	–25.2 %
Switzerland	96	138	+43.4 %
Thailand	59	114	+92.4 %
China	18	91	+409.3 %

Three price shocks hit EU exports in Tunisia (2018), Russia (2022) and the US (2022)

The dataset identifies three significant price-shock events on the export side Volatility & shocks. In Tunisia (2018), a 57.5 % price jump occurred while volumes halved, likely reflecting a supply disruption in that niche market. The Russian shock (2022) saw a 43.9 % price rise accompanied by a two-thirds volume collapse, consistent with the effect of EU sanctions and trade restrictions. The US shock (2022) was milder (+16.2 % price increase) but notable given the 24.8 % share of total export value, and appears linked to broader inflationary pressures and strong demand for high-end components.

Export concentration has declined, signalling a more balanced customer portfolio

The HHI for export values fell from 1 126 in 2015 to 901 in 2025 (–20.0 %), indicating that EU sales became less dependent on a few large buyers. This diversification is healthy, even though the United States alone still accounts for a considerable share. By contrast, import concentration increased (HHI from 2 091 to 2 330, +11.4 %), reflecting the enduring dominance of China and Taiwan.

3. Inside the EU: a clear division of labour and persistent specialisation

Southern Europe holds a strong comparative advantage in cycle and motorcycle parts

In 2025, the EU member states with the highest revealed symmetric comparative advantage (RSCA) were Slovenia (0.47), Portugal (0.45), and Italy (0.40) Specialisation. These countries specialise disproportionately in CN 8714 compared to their overall export baskets. Italy alone accounted for 18.9 % of EU exports in this product while representing only 8.0 % of total extra-EU goods exports, underlining its industrial vocation in two-wheeler components.

Export champion roles are consolidated by Italy and Germany, but Spain is catching up fast

Italy remained the largest intra-EU exporter in 2025 (€476 m, +24.9 % vs 2015), followed by Germany (€303 m, +49.5 %) Top reporters. Spain experienced the most dynamic growth (+143.2 %, reaching €95 m), while France saw its extra-EU exports decline by 27.9 %. On the import side, Germany absorbed the largest share of external purchases (€1.89 bn in 2025, +72.0 %), pointing to its role as a major European assembly and distribution hub.

Product segment breakdown shows imports dominated by frames and forks, exports by motorcycle parts

On the import side, “Frames and forks for cycles” (871491) was the largest segment in 2025 (€1.50 bn), closely followed by “Parts and accessories for bicycles, n.e.s.” (871499, €1.17 bn) and “Motorcycle parts” (871410, €1.19 bn) Product segments. Exports were led by motorcycle parts (871410, €795 m), highlighting the EU’s role as a producer of higher-value-added motorcycle components, which carry a unit price roughly three times that of some bicycle part segments.

Conclusion

The decade 2015–2025 reshaped the EU’s external trade in parts and accessories for motorcycles, bicycles, and carriages for disabled persons. The EU deepened its structural deficit, not because it imported greater volumes, but because import prices surged by over 70 %, far outpacing export price growth. The supplier landscape remained concentrated on China and Taiwan, even as the EU’s export destinations diversified away from the UK towards the US, Asia, and Latin America. Shocks in 2018 and 2022—most notably the Russian price shock and the US inflation-fuelled price burst—underscored the market’s vulnerability to geopolitical and macroeconomic disruptions. Within the EU, a clear production specialisation persists, led by Italy, Portugal, and Slovenia, ensuring that Europe retains a competitive, high-value-added manufacturing core in this segment.

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