

Market evolution: Engine parts (CN 8409) — 2015–2025

Introduction

The EU's external trade in engine parts (CN 8409) underwent notable structural shifts between 2015 and 2025. The product group, comprising diesel, spark-ignition and aircraft engine components, saw its total trade value expand despite shrinking physical volumes. Behind this paradox lie steep price rises, a reorientation of partner countries and a dramatic increase in the EU's export intensity. This report unpacks those dynamics using annual trade data and supplementary indicators.

A premium pivot: higher unit values offset shrinking tonnages

EU exports and imports gain in value while volumes decline markedly

Both sides of the EU's engine-parts trade recorded value growth even though shipped quantities fell. The resulting unit price increases were the primary driver.

Aggregate indicator	2015	2025	Change
Exports (billion EUR)	10.43	12.38	+18.7 %
Exports (thousand tonnes)	728.5	598.4	−17.9 %
Export unit price (EUR/kg)	14.32	20.69	+44.5 %
Imports (billion EUR)	5.93	6.74	+13.8 %
Imports (thousand tonnes)	518.6	464.4	−10.5 %
Import unit price (EUR/kg)	11.43	14.52	+27.1 %
Trade balance (billion EUR)	4.51	5.64	+25.1 %

Source: General Overview trade

The EU's surplus widened by a quarter, demonstrating a reinforcement of its competitive position in engine-parts trade.

All engine part segments record strong unit price increases

The price upturn was broad-based across the three sub-headings.

Product segment (exports)	2015 unit price (EUR/kg)	2025 unit price (EUR/kg)	Change
8409 99 – Diesel engine parts	13 775	19 689	+42.9 %
8409 91 – Spark-ignition parts	15 169	22 059	+45.4 %
8409 10 – Aircraft engine parts	59 200	211 652	+257.1 %

Source: Product segment breakdown

While aircraft parts represent a tiny volume, the diesel and spark-ignition segments account for over 99 % of trade and both experienced increases above 40 %. Import prices followed a similar trajectory (diesel parts +16.3 %, spark-ignition +44.5 %), indicating that the trend reflects global cost pressures and a shift towards higher-value components rather than a purely EU-specific phenomenon.

The disconnect between value and volume reflects a quality upgrade and cost pressures

Rising unit values alongside falling tonnages suggest that the average engine part traded in 2025 is lighter, more sophisticated, or more expensive to produce than a decade earlier. Inflation in raw materials and logistics certainly contributed, but the scale of the price rise—well above general inflation—points to a genuine change in the product mix, with EU firms exporting more technologically advanced components.

Geographic repositioning of trade flows

China and Türkiye become the dominant import sources as the UK's role fades

EU imports of engine parts have become markedly more concentrated on two suppliers.

Import partner (EUR million)	2015	2025	Change
China	491	1 336	+172.3 %
Türkiye	1 328	1 579	+18.9 %
United Kingdom	827	672	–18.7 %
Brazil	381	303	–20.5 %
Korea, Republic of	460	499	+8.4 %
India	261	276	+5.4 %
Mexico	203	236	+16.3 %
Other	1 976	1 844	–6.7 %

Source: Top partners overview

China's import value nearly tripled, turning it into the second-largest source behind Türkiye, while the UK lost nearly a fifth of its value, partly reflecting post-Brexit trade frictions. The import-side Herfindahl-Hirschman Index (HHI) rose from 1 130 to 1 280 (+13.3 %), confirming greater supplier concentration.

The United Kingdom and emerging markets anchor export growth, China loses ground

EU export destinations diversified, with the UK overtaking the US as the top market and several emerging economies recording spectacular growth.

Export partner (EUR million)	2015	2025	Change
United States	2 226	2 332	+4.7 %
United Kingdom	1 812	2 348	+29.6 %
China	1 272	1 207	−5.1 %
Türkiye	673	931	+38.4 %
Brazil	336	729	+116.9 %
Mexico	253	400	+57.9 %
India	226	407	+80.2 %
Other	3 635	4 029	+10.8 %

Source: *Top partners overview*

Exports to the UK jumped by almost 30 %, making it the largest destination in value, while exports to Brazil more than doubled and those to India rose 80 %. At the same time, China's importance as an export market diminished (−5.1 %). The export HHI edged down from 1 057 to 1 003 (−5.1 %), reflecting a healthier diversification of customer markets.

Shock events underline volatility in specific bilateral relationships

Two price shocks stand out in the EU's engine-parts trade.

- In 2017, EU imports from South Africa experienced a 42.6 % price spike, accompanied by a sharp drop in quantity, causing an abnormality score of 23.6.
- In 2019, the unit price of EU exports to Mexico jumped 54.3 % while volumes contracted, resulting in an abnormality of 47.5, likely linked to a temporary supply bottleneck or a shift to premium product categories.

These events, documented in the shocks dashboard, highlight the sensitivity of certain trade lanes to abrupt price adjustments, though they did not alter the overall macro-trends.

Deepening international integration despite a smaller domestic production base

EU engine-part production contracted by a fifth, but export propensity soared

The EU's own production value of engine parts shrank from EUR 12.43 billion (2003) to EUR 10.06 billion in 2024, a decline of 19.1 % (Production value). Nevertheless, the share of production that is exported—export propensity—skyrocketed from 29.2 % in 2015 to 48.6 % in 2024 (Export propensity). Trade intensity (exports + imports relative to production) jumped from 22.5 % (2003) to 63.7 % (2024). The EU is therefore producing fewer engine parts at home but is plugging into global value chains more deeply, exporting an ever-larger slice of a smaller pie.

Net import reliance remained solidly negative, reinforcing strategic autonomy

The net import reliance ratio, a measure of dependence on foreign supply, was –11.7 % in 2015 and reached –7.6 % in 2024 (latest available) (Net import reliance). A negative value means the EU is a net exporter of engine parts and not reliant on imports for its own consumption. Although the indicator became slightly less negative during the post-pandemic recovery, it remains strongly in surplus territory, underlining that the EU's engine-parts sector is not vulnerable to supply disruptions from abroad.

Import concentration increased while export markets became more diversified

The HHI for import values climbed from 1 130 to 1 280 (+13.3 %), driven by China's sharp rise and the declining share of other suppliers (Concentration HHI). Conversely, the export HHI fell from 1 057 to 1 003 (–5.1 %), meaning EU exports are being spread across a larger number of partners, reducing reliance on any single market. The most specialised EU reporters in 2025—Germany (RSCA 0.29), Poland (RSCA 0.28), Portugal (RSCA 0.23)—confirm that the sector remains anchored in a small group of high-capability member states, even as final demand diversifies.

Conclusion

The EU's trade in engine parts over the 2015-2025 period is a story of value-upgrading, partner realignment and integration into global markets. While physical volumes fell, unit prices rose steeply across diesel, spark-ignition and aircraft components, boosting the trade surplus. China and Türkiye tightened their grip on EU imports, whereas the UK and a

group of emerging economies became the main engines of export growth. Even as domestic production contracted by a fifth, export propensity ballooned, and the EU maintained a strong net-exporter position. The challenge ahead will be to manage the rising concentration of imports and to keep the differentiation strategy that underpins the sector's premium pricing.

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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](#).