

Market evolution: Lifts escalators and conveyors (CN 8428) — 2015–2025

Introduction

This report examines the European Union's external trade in lifting, handling, loading or unloading machinery (CN 8428) — a broad category spanning lifts, escalators, conveyors, teleferics and other handling equipment — over the period 2015 to 2025. Using annual customs data for extra-EU flows, we identify three defining dynamics: a robust trade surplus underpinned by diverging value and volume trends; a major realignment of partner geography; and a structural shift towards more technologically advanced, higher-value products.

A surplus sustained by soaring values despite shrinking volumes

Export values expanded by a quarter while the tonnage shipped actually declined, indicating a powerful upgrading of the EU's export basket

Extra-EU exports rose from €6.71 billion to €8.46 billion between 2015 and 2025, an increase of 26 %. Over the same period, however, the exported weight fell by 19 % (from 692 000 tonnes to 561 000 tonnes). Consequently, the average export price jumped from €9 700 per tonne to €15 100 per tonne — a 55.5 % rise — signalling that EU producers have moved into more sophisticated, better-priced machinery. [External trade overview](#)

Imports more than doubled, driven by a combination of higher volumes and a sharp increase in unit prices

Import value soared from €1.41 billion to €3.23 billion (+128.8 %), with volumes up 43.8 % (176 000 tonnes to 253 000 tonnes) and average prices climbing from €8 000 per tonne to €12 800 per tonne (+59.1 %). The import price convergence with export prices highlights the growing quality and complexity of foreign-supplied machinery. [External trade overview](#)

The trade balance remained broadly stable, underscoring the EU's enduring net-exporter status

Despite the dramatic rise in imports, the bilateral surplus dipped only marginally — from €5.30 billion in 2015 to €5.22 billion in 2025 — thanks to the parallel expansion of higher-value exports. External trade overview

Partner reshaping: the rise of the US export market and an Asian import surge

The United States strengthened its position as the EU's premier export destination, while trade with Russia evaporated

EU exports to the US more than doubled, from €0.90 billion to €2.17 billion (+141.6 %), making it by far the largest outlet. Meanwhile, exports to the Russian Federation collapsed from €453 million to just €3 million, following the imposition of sanctions after 2022. Other major markets such as the United Kingdom and Switzerland recorded steady but moderate growth. Top partner countries

Export partner	2015 (€ mn)	2025 (€ mn)	Change
United States	900	2 174	+142%
United Kingdom	820	1 017	+24%
Switzerland	417	590	+42%
Russian Federation	453	3	-99%
Australia	196	273	+39%
Norway	194	282	+46%

On the import side, China and Japan emerged as dominant suppliers, reflecting a pivot towards Asian production of automation equipment

Chinese imports jumped from €201 million to €924 million (+359.7 %), while Japanese deliveries skyrocketed from €159 million to €971 million (+510.7 %), with a particularly sharp acceleration in 2025. The United Kingdom, Switzerland, Türkiye and South Korea also posted solid increases. This shift pushed the import-side market concentration (HHI) from 1 770 to 2 027 (+14.5 %), indicating a tighter reliance on a handful of Asian economies. Top partner countries · Market concentration (HHI)

Import partner	2015 (€ mn)	2025 (€ mn)	Change
China	201	924	+360%
Japan	159	971	+511%
United Kingdom	324	379	+17%
United States	392	285	-27%
Switzerland	157	212	+35%
Türkiye	18	96	+438%
Korea, Republic of	33	94	+185%

Technological shift and the robot revolution driving trade values

Industrial robots became the fastest-growing import sub-category, while exports remained anchored in a broad range of machinery

The product structure of CN 8428 reveals a clear hierarchy. On the export side, “Machinery for lifting, handling, loading or unloading, n.e.s.” (842890) remained the dominant segment (€3.41 billion in 2025), followed by lifts (€1.19 billion) and continuous-action conveyors (€1.90 billion). Among imports, the same broad category (842890) was the largest, but industrial robots (842870) burst from negligible values to €986 million in 2025 — nearly matching the “n.e.s.” segment and surpassing most other sub-headings. This underscores a rapidly growing reliance on imported robotic handling equipment, mirroring the global automation trend. Product segment breakdown

Unit prices rose across all main categories, driven by technology content and, to some extent, supply-chain pressures

Export prices for machinery n.e.s. (842890) climbed from €9 974/tonne to €16 199/tonne, while import prices for the same code increased from €7 585/tonne to €10 103/tonne. The steepest price appreciation occurred in continuous-action conveyors and pneumatic elevators, reflecting the integration of more sophisticated drives and controls. Volatility analysis confirms that price shocks were frequent, especially from partners like China, the US, and South Korea, where the coefficient of variation in import volumes exceeded 0.5. Volatility analysis · Supply and price shocks

The EU’s global engagement in this sector deepened markedly

Both trade intensity (total trade relative to production) and export propensity (exports over production) more than doubled over the period — from 18.9 % to 49.0 % and from 16.4 % to 42.5 %, respectively. Simultaneously, the net import reliance indicator fell from -15.3 % to -42.5 %, signalling that the EU’s net-exporter position in handling machinery

strengthened substantially, even as it became a larger importer of specialised equipment like industrial robots. Net import reliance and trade intensity

Conclusion

Between 2015 and 2025, EU trade in lifting and handling machinery evolved from a stable surplus activity into a more dynamic, technology-intensive segment. Rising unit values, driven by the shift towards advanced machines and industrial robots, allowed the EU to maintain its export surplus even as import volumes surged. Geopolitically, US demand became central for EU exporters while Asian suppliers — notably China and Japan — filled the gap in high-tech imports. The sector's deepening integration into global value chains is reflected in a doubling of trade intensity and export propensity. Looking ahead, the momentum of automation and the EU's ability to supply high-value solutions will likely remain the key determinants of its competitive position.

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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](#).