Market evolution: Motor vehicle parts (CN 8708) — 2015–2025

Introduction

This report examines the external trade of the European Union (EU-27) in motor vehicle parts (CN 8708) over the decade 2015-2025. The product category covers a broad range of components – from brakes and gearboxes to body parts, axles and suspension systems – used in vehicles classified under headings 8701 to 8705. The analysis draws exclusively on yearly figures provided by the Eurostat-Comext dashboard for trade with non-EU partners. The findings highlight three central dynamics: a growing divergence between value and volume performance, a profound reordering of major trading partners, and a clear pivot of production and export specialisation towards Central and Eastern member states.

1. Value versus volume: a two-speed trade performance

The aggregate trade figures reveal a striking contrast between the value and the physical quantity of EU motor vehicle part flows.

Export value grew modestly despite a deep drop in volumes

Between 2015 and 2025, the value of EU exports of CN 8708 edged up from € 47.0 billion to € 50.1 billion, an increase of just 6.5 % (see the General Overview). Over the same period, the exported quantity in tonnes dropped by 19.5 %, from 5.2 million tonnes to 4.2 million tonnes. The implicit unit value therefore jumped by 32.4 % – from about € 8,992 per tonne to € 11,901 per tonne. This price escalation reflects a combination of inflation, a shift towards more sophisticated, higher-value components, and the structural transformation of the automotive supply chain towards electrification.

Imports expanded briskly, led by a surge from China

Import values rose far more dynamically, from € 19.6 billion to € 30.2 billion (+54.0 %), while imported quantities grew by 37.5 % to 4.5 million tonnes. Import unit values increased by a more contained 12.0 %, underscoring that the import boom was volume-driven. As a result, the EU's trade surplus for this category shrank from € 27.4 billion to € 19.9 billion ((-)27.4 %).

The main driver of import growth was China, whose deliveries soared by 229.4 % in value, from € 2.5 billion to € 8.2 billion. This single partner accounted for a large part of the total import expansion. Türkiye and India also registered strong advances (see Section 2).

High-value segments bolstered export prices

The product breakdown (see the Segment Breakdown) helps explain the overall price rise. Exports of gearboxes (870840), the category with the highest unit value, increased in unit price from € 16,693 per tonne to € 21,161 per tonne, while the volume of these gearbox exports declined only slightly ((-)11.4 % from 583 k t to 516 k t). Similarly, suspension systems (870880) and body parts (870829) exhibited strong unit value gains. Thus, the EU steadily moved up the value chain in external trade, supplying pricier, technologically advanced components even as overall tonnage contracted.

2. A reshuffled geopolitical map of partners

The identities and weights of the EU's main customers and suppliers for motor vehicle parts have changed dramatically over the last decade.

Imports: China consolidates its position while the UK retreats

The top-7 import partners (see the Top Partners view) illustrate a clear re-ranking.

Partner	2015 value (€ bn)	2025 value (€ bn)	Change
China	2.5	8.2	+229.4 %
Türkiye	2.4	4.9	+103.5 %
United Kingdom	3.5	2.6	–26.0 %
Korea, Republic of	2.5	2.5	–1.6 %
Japan	2.4	2.5	+3.5 %
India	0.5	1.4	+194.6 %
United States	1.8	1.3	–29.7 %

China moved from second to first place among import sources, increasing its share substantially. Meanwhile, post-Brexit arrangements and the UK's declining automotive manufacturing footprint contributed to a 26 % fall in its parts exports to the EU. India and Türkiye, both with lower cost structures and growing vehicle production, also expanded rapidly.

Exports: Mexico and Türkiye replace Russia as growth poles

On the export side, the top partners table reveals the seismic shock of sanctions against Russia and the rising importance of near-shoring and platform-sharing with countries like Mexico and Türkiye.

Partner	2015 value (€ bn)	2025 value (€ bn)	Change
United Kingdom	9.2	8.7	–5.7 %
China	8.8	7.6	–13.9 %
United States	7.6	7.7	+1.3 %
Türkiye	3.2	5.3	+62.6 %
Mexico	1.7	3.3	+96.1 %
Russian Federation	2.2	0.07	–96.8 %
Brazil	1.6	2.3	+38.4 %

The United Kingdom remained the largest destination in value terms, albeit with a slight decline. Exports to China also fell ((-)13.9 %), likely reflecting the growing self-sufficiency of Chinese manufacturers. The most striking change was the near-total disappearance of Russia as an EU export market after 2022; deliveries plummeted from € 2.2 billion to just € 70 million. The resulting loss was partly compensated by strong growth in shipments to Mexico (+96.1 %) and Türkiye (+62.6 %), both closely integrated into European and North American vehicle production networks.

Concentration trends: imports become more focused, exports more diversified

The structural shift is also visible in market concentration. The Herfindahl-Hirschman index (HHI) for imports rose from 1 085 to 1 326, a 22.2 % increase (Concentration HHI). This reflects the growing dependency on a few suppliers, notably China and Türkiye. By contrast, the export HHI declined by 12.3 %, from 1 134 to 995, meaning that EU export destinations became slightly more dispersed, reducing the bloc's vulnerability to demand shocks in any single market.

3. The rise of Central and Eastern Europe as manufacturing hubs

The geography of EU motor vehicle parts production and export specialisation has tilted decisively eastward, with significant implications for the bloc's trade structure.

Poland, Romania, and Slovakia emerge as the most specialised exporters

Using the revealed symmetric comparative advantage (RSCA) indicator for 2025, the member states most specialised in exporting CN 8708 are all located in Central and Eastern Europe (data from the Specialisation tab).

Member State	RSCA (2025)	RCA	Share of EU export of this product
Romania	0.477	2.82	4.7 %
Slovakia	0.401	2.34	4.9 %
Czechia	0.386	2.26	10.8 %
Hungary	0.330	1.99	5.3 %
Poland	0.294	1.83	12.2 %

Germany remains the largest absolute exporter (€ 25.3 billion in 2025), but its growth over the period was negligible (+0.7 %; see the Top Reporters). By contrast, Poland's exports almost doubled (+101.9 %), rising from € 1.2 billion to € 2.4 billion, and Czechia's exports grew by 30.5 %. This demonstrates a clear shift of labour-intensive and technologically mature assembly activities to the newer member states, while Germany and other Western European countries specialise in higher-value components and R&D.

Production value nearly doubled, reinforcing export ambition

EU-wide production statistics (in Production Volumes) show that the sold production value of motor vehicle parts shot up from € 108.8 billion in 2015 to € 206.2 billion in 2024, an 89.5 % increase. The production quantity rose by a more modest 36.1 %, indicating again that the sector moved towards higher unit values. The export propensity – the share of production sent to non-EU markets – climbed from around 26.9 % to 26.5 % in 2024, after peaking at 30.7 % in 2017. The sustained high propensity confirms that EU manufacturers remain deeply integrated into global value chains, even as some assembly was relocated to neighbouring countries.

Conclusion

The EU trade in motor vehicle parts over 2015-2025 reveals a sector that has managed to defend its external surplus even in the face of profound structural change. The value of exports was largely preserved, but the underlying volume contracted sharply, pointing to an upgrading of the product mix and a shift towards more expensive, technology-intensive components. Geopolitically, China emerged as the overwhelmingly dominant source of imports, while Russia's exit as an export market was offset by rapid growth in Mexico and

Türkiye. Within the EU, the centre of gravity for manufacturing and export specialisation moved eastward, with Poland, Romania, Czechia and Slovakia becoming crucial hubs. These patterns underscore a dual challenge: managing supply-side dependencies on a few non-EU partners while capitalising on the high-value, innovation-driven segments where European parts makers still hold a clear competitive edge.

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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.