EU TRADE EXPLORER

Market evolution: Motorcycles (CN 8711) — 2015–2025

Introduction

This report analyses the European Union's extra-EU trade in motorcycles, mopeds, cycles with an auxiliary motor and side-cars (CN 8711) from 2015 to 2025. The data reveal a decade marked by a massive surge in imports that dramatically widened the trade deficit, a gradual reorientation of export destinations, and a structural shift towards electric powertrains. Behind these aggregate trends lie clear changes in partner concentration, product mix and the specialisation of individual Member States.

A Widening Trade Deficit Driven by Surging Asian Imports

EU imports of motorcycles grew far faster than exports, causing the trade deficit to balloon from EUR 0.4 billion to EUR 2.9 billion over the period.

Imports more than doubled in value, while export growth remained muted

Between 2015 and 2025 the value of extra-EU imports rose by 131.8 %, from EUR 2.38 billion to EUR 5.53 billion, compared with an export increase of only 33.5 % (EUR 1.96 billion to EUR 2.62 billion). In volume terms, imports climbed 95.8 % (165 thousand to 322 thousand units) while exports grew just 7.8 % (58 thousand to 62 thousand units). The resulting trade deficit swelled by 592.2 %. The average unit price of imports rose by 18.4 % and that of exports by 23.8 %, indicating an overall market shift towards higher-value products.
General Overview

A handful of Asian partners captured the majority of import growth

Five Asian economies saw exceptional increases, while the United States' role as a supplier collapsed.

Partner	Imports 2015 (EUR m)	Imports 2025 (EUR m)	Change (%)
China	513.6	2 059.1	+300.9
Japan	779.4	1 432.8	+83.8
Thailand	167.5	674.4	+302.6
Taiwan	150.1	391.8	+161.0
Viet Nam	62.4	262.5	+321.0
India	40.6	186.5	+359.3
United States	428.6	138.3	–67.7

Top Partners

Import concentration intensified, exposing supply-side risks

The Herfindahl-Hirschman Index (HHI) for import values increased from 1 997 to 2 318 (+16.1 %), and the volume HHI rose even more sharply, from 2 422 to 3 980 (+64.3 %). This reflects growing reliance on a small number of Asian sources—especially China, which alone accounted for 37 % of EU motorcycle imports by value in 2025, up from 21 % in 2015.

Concentration HHI

Export Resilience and Geographic Diversification Amidst a Shifting Global Landscape

EU exports displayed resilience but also a marked rotation away from traditional advanced-economy markets towards closer or faster-growing destinations.

Overall exports grew modestly, with a temporary spike in 2022

Total export value rose from EUR 1.96 billion to EUR 2.62 billion. However, the series peaked at EUR 3.66 billion in 2022 before falling back in subsequent years, suggesting a post-pandemic demand surge that has since normalised. Export volume remained relatively stable, moving from 57 810 to 62 321 units.

General Overview

Export destinations shifted towards Switzerland, Türkiye and Norway

The table below highlights the contrasting performance of the top export markets.

Partner	Exports 2015 (EUR m)	Exports 2025 (EUR m)	Change (%)
United States	519.3	531.3	+2.3
United Kingdom	445.0	422.6	–5.0
Switzerland	194.2	407.7	+110.0
Türkiye	37.9	227.5	+499.6
Australia	122.6	105.9	–13.7
Japan	91.2	95.1	+4.3
Norway	45.4	90.5	+99.4

Top Partners

Export markets became less concentrated

The export HHI fell by 25.1 % (1 421 to 1 064), and the volume HHI by 28.2 % (1 148 to 824). This indicates a successful broadening of the customer base, reducing dependence on the two largest markets (the US and UK), which together accounted for 44 % of exports in 2015 but only 36 % in 2025. Temporary price shocks, such as an 11.8 % price drop on exports to Japan in 2021 and a 24.9 % price spike on exports to Türkiye in 2017, had limited structural impact because of this diversification.

Concentration HHI

Shock Events

Structural Transformation: The Rise of Electric Powertrains and Specialisation in EU Member States

The product composition changed considerably, with electric two-wheelers moving from a niche to a mainstream trade category, while large-engine motorcycles remained the EU’s export stronghold.

Electric motorcycles (8711 60) became a major trade flow, especially on the import side

Electric motorcycle imports were negligible in 2015 but reached EUR 1.64 billion by 2025, surpassing all other engine categories in value. In volume they grew from 58.7 thousand units (2017) to 121.9 thousand units. Exports of electric models also expanded strongly, rising from EUR 161.6 million (2017) to EUR 655.0 million (2025). This segment now drives a large share of the import bill and a growing portion of EU shipments abroad.

Product Compare

Large-engine motorcycles (over 800 cc) remained the backbone of EU exports

The 8711 50 category (engine capacity > 800 cm³) consistently dominated exports with values ranging from EUR 1.02 billion to EUR 1.59 billion and high unit prices (EUR 44 580 per vehicle in 2015, EUR 56 690 in 2025). Together with mid-range categories (250–800 cc), these combustion-engine models account for the bulk of the EU's competitive advantage in terms of unit value.

Product Compare

A few Member States are highly specialised in motorcycle trade

In 2025, Bulgaria (RSCA 0.62), Austria (0.42), Hungary (0.27), Italy (0.26) and Lithuania (0.25) showed the strongest revealed comparative advantage in this product group. Conversely, Ireland (–0.99), Denmark (–0.87) and Finland (–0.77) had extremely low specialisation. This split reflects the geographic concentration of manufacturing, with Italy, Germany and Austria being major exporters, while the Netherlands, Belgium and Spain handle significant re-export and import distribution.

Most Specialised

Volatility

Conclusion

The EU's motorcycle trade over the 2015-2025 period was characterised by a profound shift in its import structure, a moderate and diversifying export performance, and the rapid electrification of the product mix. Surging imports from China, Thailand, Viet Nam and India drove the trade deficit to record levels, while the Union maintained its position as a high-value exporter, particularly in the large-engine segment. At the same time, the import source concentration increased, posing a potential vulnerability. Looking ahead, the continued rise of electric motorcycles and the ability to further broaden export markets will be crucial for the EU's trade balance in this sector.

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