EU TRADE EXPLORER

# Market evolution: Special purpose vehicles (CN 8705) — 2015–2025

## Introduction

The EU market for special purpose motor vehicles (CN 8705) — crane lorries, fire fighting vehicles, concrete-mixers, mobile workshops and similar units — has experienced a profound transformation between 2015 and 2025. The period is characterised by a growing export surplus, a shift towards higher-value products and a notable reconfiguration of both export destinations and import sources. The report identifies three key dynamics: a decoupling of export value from volume, a surge in imports driven by diversifying suppliers, and a series of trade shocks that tested the resilience of EU producers. All figures are drawn exclusively from the data visualised on the EU Trade Dashboard.

## 1. Value creation through price increases amid falling export volumes

### Export revenues climbed despite a continuous decline in the number of vehicles shipped

EU extra-EU exports of CN 8705 rose from €3 817 million in 2015 to €4 429 million in 2025, a gain of **16.0 %** - while the quantity exported fell by **-17.9 %**, from 423 186 units to 347 608 units.
[General Overview trade dashboard]

| Year | Export value (€ m) | Export quantity (units) | Average unit price (€) |
|---|---|---|---|
| 2015 | 3 817 | 423 186 | 9 020 |
| 2020 | 3 296 (min) | 312 973 (min) | — |
| 2024 | 4 721 (max) | 383 257 | — |
| 2025 | 4 429 | 347 608 | 12 741 |

The average unit price jumped by **41.2 %** over the ten-year window, clearly separating revenue growth from physical shipments.

### Unit prices soared across all major vehicle categories

The price surge was not confined to a single segment. All product sub-headings recorded marked price increases, often offsetting volume weakness.

| CN8 code | Description | Export quantity change 2015 → 2025 | Export value change 2015 → 2025 | Unit price change 2015 → 2025 |
|---|---|---|---|---|
| 870510 | Crane lorries | -15.1 % | +17.4 % | +38.3 % |
| 870590 | Other special-purpose vehicles | -6.7 % | +38.7 % | +48.6 % |
| 870540 | Concrete-mixer lorries | -44.6 % | -40.6 % | +7.3 % |
| 870530 | Fire fighting vehicles | -32.8 % | -12.7 % | +30.0 % |

[Product segment comparison]

Fire fighting vehicles, for instance, saw a one-third drop in units but only a 12.7 % value loss because the average price per vehicle rose from €20 550 to €26 716. The "other special-purpose vehicles" category (which includes mobile workshops, radiological units, etc.) became the largest export segment by value in 2025, overtaking crane lorries.

### The shift towards higher-value products reshaped export composition

These price dynamics reflect both a qualitative upgrade of the vehicles sold and a tendency to favour complex, custom-built units. The growing sophistication of European special vehicles underpinned an export performance that proved resilient even when total demand, measured in units, contracted.

## 2. Import expansion and increased supplier diversity

### EU imports surged in both value and quantity, while unit prices remained flat

Extra-EU imports of CN 8705 moved from €263 million in 2015 to €435 million in 2025 (+65.6 %), with volumes rising almost in lockstep (+65.8 %) and prices virtually unchanged (-0.1 %).
[General Overview trade dashboard]

| Year | Import value (€ m) | Import quantity (units) | Average unit price (€) |
|---|---|---|---|
| 2015 | 263 | 36 087 | 7 281 |
| 2025 | 435 | 59 817 | 7 274 |

The mirror image of export trends — fast volume growth, stable prices — points to the arrival of lower-cost suppliers in segments where price competition is more intense.

## Diversification of import sources reduced concentration

The Herfindahl-Hirschman Index (HHI) for extra-EU imports fell from 2 186 in 2015 to 1 630 in 2025 (-25.4 %), signalling a much broader supplier base.
[Concentration HHI]

## The rise of new import partners reshaped the sourcing landscape

Traditional top suppliers such as Switzerland saw their role shrink, while several partners recorded explosive growth.

| Import partner | 2015 (€ m) | 2025 (€ m) | Change |
|---|---|---|---|
| United Kingdom | 54.9 | 127.1 | +131.7 % |
| China | 1.6 | 51.5 | +3112.9 % |
| Norway | 49.9 | 58.4 | +17.1 % |
| Switzerland | 92.7 | 60.0 | -35.3 % |
| Türkiye | 7.2 | 37.4 | +420.3 % |
| United States | 20.0 | 29.1 | +45.9 % |

[Top partners]

China’s entry into this market is particularly striking, with imports rising from negligible levels to over €51 million. The United Kingdom, after Brexit, became the largest single extra-EU supplier, while Türkiye also expanded swiftly. This diversification helped supply the rapidly growing EU domestic demand for special vehicles, which saw production value more than double (from €3 228 million in 2015 to €7 823 million in 2024) and production volume rise by 76.2 % over the same period.
[Production volumes]

# 3. Navigating volatility: trade shocks and structural adjustments

## The abrupt exit from the Russian market constituted the most significant supply shock

EU exports of special vehicles to Russia collapsed from an average of 7 867 units per year (2015-2022) to just 76 units in 2023-2025, a **-99 %** drop. By 2024 and 2025 the quantity fell to zero. This removal of a market that represented 2.3 % of EU exports in value illustrates the direct impact of sanctions and the EU’s capacity to redirect trade.
[Supply shocks]

## Price shocks rattled several export markets and import origins

The volatility detection algorithm flagged numerous price anomalies, confirming that certain relationships experienced sudden, intense repricing.

| Entity | Flow | Shock centre | Price shift |
|---|---|---|---|
| Egypt | exports | 2023 | +99.7 % |
| Morocco | exports | 2023 | +276.0 % |
| Korea, Republic of | exports | 2022 | +42.3 % |
| Taiwan | exports | 2017 | +153.1 % |
| Norway | imports | 2023 | +29.6 % |
| United States | imports | 2022 | +188.5 % |
| United Kingdom | imports | 2018 | +23.1 % |

[Price shocks]

Egyptian exports, for instance, witnessed a near-doubling of unit prices in 2023 while quantities plummeted, likely reflecting a shift to a few highly sophisticated orders. Import price volatility was most extreme for China (coefficient of variation 1.30) and South Africa (2.27), although these flows remain relatively small in absolute terms.
[Volatility bars]

## Underlying competitiveness reinforced by production growth and rising export propensity

Despite these shocks, the EU's position as a net exporter strengthened: the trade surplus reached €3 994 million in 2025, up from €3 554 million in 2015 (+12.4 %).
The export propensity (extra-EU exports as a share of EU production value) rose from 47.5 % in 2015 to 60.4 % in 2024, confirming that European manufacturers are increasingly oriented towards foreign markets.
[Export propensity]

A highly specialised core of Member States — led by Latvia (RSCA 0.734), Italy, Finland and Germany — continues to anchor the EU's global competitiveness in this industry.
[Specialisation map]

# Conclusion

The EU's trade in special purpose motor vehicles over 2015-2025 displays a distinct "premiumisation" of exports: steadily rising unit values compensated for declining volumes, keeping export revenues on an upward track. Imports, in contrast, expanded rapidly on the back of a wider, more diversified supplier base — notably featuring China and Türkiye —

while prices stayed constant. The market proved resilient in the face of severe geopolitical and price shocks, with the loss of the Russian market absorbed without a dent in the overall surplus. Bolstered by soaring domestic production and a growing export propensity, the EU's special vehicle sector enters the coming years with a reinforced global footprint and a product mix that continues to climb the value ladder.

---

Generated on 2026-07-28 based on data from tradedashboard.eu

Auto-generated report: it accelerates, and sometimes misleads, human analysis. It cannot replace it in full.

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.