EU TRADE EXPLORER

Market evolution: Trailers and semi-trailers (CN 8716) — 2015–2025

Introduction

Customs code 8716 covers a broad basket of non-mechanically propelled vehicles and their parts — from goods trailers and agricultural semi-trailers to caravans and hand-drawn carts. The European Union has long been a net exporter in this sector, but the decade 2015–2025 marked a significant rebalancing of extra-EU trade. Import values surged while export volumes barely moved, the partner map was redrawn by geopolitical shocks, and a pronounced structural upscaling took hold both in trade and in domestic production. This report analyses the main dynamics behind these shifts, drawing solely on the data provided by the EU extra-EU trade dashboard and its linked modules.

1. Import surge outruns export volume, compressing the trade surplus

1.1 Extra-EU imports more than doubled in value, with volume growth far outpacing exports

Between 2015 and 2025, EU imports of CN 8716 products rose from **€1,004 million to €2,112 million**, a jump of **110.4 %**. The increase was driven by a strong rise in both quantity (**+69.2 %**, from 382 894 to 647 843 tonnes) and unit price (**+24.4 %**, from €2 621 to €3 260 per tonne). In contrast, exports grew from **€2,723 million to €3,417 million** — a much more modest **+25.5 %** — with virtually stagnant volume (**+2.6 %**, 779 703 t to 800 224 t) and most of the value gain coming from a **22.3 %** price increase.

1.2 The trade surplus shrank by a quarter

The EU's extra-EU trade surplus in these products consequently contracted from **€1,719 million in 2015 to €1,305 million in 2025**, a decline of **–24.1 %**. The surplus had peaked at **€2,320 million in 2022**, but the subsequent combination of falling export values and still-elevated imports brought it down sharply. This compression is also reflected in the net import reliance indicator, which moved from **–9.3 % to –6.8 %** (less negative, i.e. a weaker net-export position), with a low of **–19.1 %** recorded much earlier in the time series (2012).

Indicator	2015	2025	Change (%)
Exports (€ million)	2 723	3 417	+25.5
Imports (€ million)	1 004	2 112	+110.4
Trade balance (€ million)	1 719	1 305	–24.1
Export quantity (tonnes)	779 703	800 224	+2.6
Import quantity (tonnes)	382 894	647 843	+69.2

Source: General overview – trade flows.

2. Geopolitical pivots rewrite the partner landscape

2.1 The collapse of Russia and the war-time surge of Ukraine

The most dramatic change on the export side was the virtual disappearance of the Russian market. EU exports to the Russian Federation collapsed from **€199 million in 2015 to essentially zero (€10 225)** in 2025 following the sanctions imposed after 2022. Ukraine, however, became a crucial compensatory destination, with exports rising from **€54 million to €143 million** (-\ +165.1 %). Both flows were highly volatile: Russia shows the second-highest export instability (coefficient of variation **0.78**), and Ukraine's CV stands at **0.36**, illustrating the effects of war and sanctions on trade predictability.

2.2 Türkiye, Serbia and India emerge as dynamic import suppliers

EU imports from **Türkiye** nearly quadrupled, from **€129 million to €474 million** (+268.3 %), making it the second-largest source. **Serbia** more than tripled its shipments (€35 M → €105 M, +204.4 %), while **India** grew at an extraordinary pace from just **€6.7 million to €66.4 million** (+885.8 %). China remained the top supplier, rising from **€473 million to €859 million** (-\ +81.7 %), but its share in the import bundle dropped as other suppliers expanded.

Top extra-EU import partners	2015 (€ million)	2025 (€ million)	Change (%)
China	473	859	+81.7
Türkiye	129	474	+268.3
United Kingdom	202	313	+54.5
Serbia	35	105	+204.4
India	6.7	66.4	+885.8

Source: Top partners by value – imports.

2.3 Supplier concentration is falling, while export destinations remain diversified

The Herfindahl-Hirschman index for extra-EU imports declined from **2 846 to 2 444** (-\ –14.1 %), indicating a less concentrated, more diversified supply base. Export concentration, in contrast, stayed low and moved only slightly from **930 to 999** (-\ +7.4 %). This shows that while the EU still sells to a very wide array of destinations, its import sourcing has become somewhat more balanced, reducing dependency on a single supplier. More detail is available under market concentration.

3. Structural transformation: value over volume in trade and production

3.1 EU production volume halved while its value doubled

One of the most striking features of the sector is the decoupling between output volume and value. EU **production quantity** fell from **17.1 million units** in the earliest available year (2003) to **8.2 million units** in 2024 (-\ –51.8 %). Over the same period, **production value** rose from **€8.2 billion to €16.5 billion** (-\ +101.1 %). The implied **unit value** jumped from about **€481 to €2 009**, signalling a determined move toward more sophisticated, higher-value products — a trend that also shows up in rising trade unit values. Data on production is available here for volume and value.

3.2 Specialisation concentrates in a handful of Member States

In 2025, the most **specialised EU exporters** (using the revealed symmetric comparative advantage, RSCA) were **Luxembourg** (RSCA 0.74), **Lithuania** (0.44), **Estonia** (0.33), **Germany** (0.30) and **Poland** (0.25). Germany alone accounts for **39.2 %** of total EU production in this sector, although its export value declined by **–10.1 %** over the decade. Poland, by contrast, saw its exports rocket by **+122.1 %**, reflecting a rapid catching-up in specialisation. The full specialisation table can be consulted here.

3.3 High-value segments and parts drive export performance

A look at the product-level breakdown (using the cross-section comparison) shows that **goods trailers (CN 871639)** dominate export tonnage and value. Their export price rose from **€2 563/t to €2 971/t**. **Parts (CN 871690)** and **hand-drawn vehicles (CN 871680)** stood out by value: exports of parts grew from **€925 million to €1 097 million**, while hand-drawn vehicles jumped from **€210 million to €342 million** — with a particularly high unit value of **€8 801/t** in 2025. This compositional shift towards pricier categories underpins the overall price-based export growth.

Conclusion

The EU's extra-EU trade in trailers, semi-trailers and non-mechanically propelled vehicles over the 2015-2025 period was defined by three overlapping trends. First, a vigorous import expansion, led by China, Türkiye and new dynamic sources such as Serbia and India, eroded the EU's traditional surplus and pushed net import reliance closer to zero. Second, geopolitical turbulence — especially the Russia-Ukraine war — redrew the map of top export destinations and introduced exceptional volatility for several partners. Third, a profound structural change saw the sector move decisively up the value ladder: domestic production volumes halved while value doubled, trade transactions grew in price rather than quantity, and specialisation deepened in a few Member States producing high-unit-value items. Together, these forces point to a sector that is far more integrated with global supply chains, increasingly reliant on imports of volume goods while specialising in higher-end, higher-priced exports — a delicate balance that will require close monitoring in the years ahead.

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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.