EU TRADE EXPLORER

Market evolution: Furniture and lighting (CN 94) — 2015–2025

Introduction

This report examines the evolution of extra-EU trade in Chapter 94 – covering furniture, bedding, mattresses, cushions, luminaires, lighting fittings, illuminated signs, and prefabricated buildings – from 2015 to 2025. Over this period the EU has moved from a solid trade surplus to a structurally rising deficit. While export values increased modestly, import values soared, driven primarily by surging shipments from a handful of Asian and neighbouring suppliers. At the same time, export volumes contracted almost everywhere, yet unit prices rose sharply, suggesting an ongoing shift towards higher-value output. The analysis draws exclusively on data from the EU Trade Dashboard, and all figures cited follow directly from the underlying dashboard.

EU trade in CN 94 – Overview

From trade surplus to widening deficit: the import surge from key suppliers

The extra-EU trade balance for furniture and lighting has swung from a surplus of €5.75 billion in 2015 to a deficit of €-4.56 billion in 2025, a deterioration of 179.4 %. Exports grew moderately (+13.2 % in value) while imports jumped by 68.7 %, pulling the balance deeply into negative territory.

Rapid volume growth from China, Türkiye, Ukraine and others drives the import expansion

Extra-EU imports rose from €19.97 billion (2015) to €33.69 billion (2025). The expansion was overwhelmingly volume-based: import quantities climbed 78.4 %, while the average import price actually fell 5.5 %. Five partners accounted for the bulk of the increase:

Supplier	2015 value (€)	2025 value (€)	Change (%)
China	12.26 bn	21.42 bn	+74.7
Türkiye	0.81 bn	2.12 bn	+159.9
Ukraine	0.12 bn	0.75 bn	+515.5
Viet Nam	0.68 bn	1.00 bn	+47.6
India	0.41 bn	0.66 bn	+59.6

China alone accounted for roughly two-thirds of the extra-EU import bill, and its shipments (in tonnes) rose from 2.84 million to 5.67 million over the period. Türkiye and Ukraine both more than doubled their volumes. The import concentration (HHI value) edged up from 3 875 to 4 165, indicating a modest tightening of supply sources.

Top import partners

Export growth is too slow to offset the import boom

Extra-EU exports reached €29.13 billion in 2025, 13.2 % above the 2015 level. However, export tonnage fell by 11.2 %, meaning the entire value increase was driven by a 27.6 % rise in unit prices. The main export destinations are far more diversified (HHI below 1 000) but their combined growth was insufficient to keep the trade balance positive.

- The United Kingdom remained the top outlet (€5.12 bn → €5.47 bn, +6.9 %).
- The United States grew strongly (€3.37 bn → €5.03 bn, +49.0 %).
- Switzerland and Norway were relatively stable, while exports to China contracted (–17.7 %) and those to the Russian Federation collapsed (–75.2 %).

Thus, the trade balance flipped because imports surged in volume terms while exports grew in value mainly through higher prices, not broader sales.

Geopolitical shocks and price volatility redefine trading patterns

The 2022 global supply-chain turmoil, together with the EU's sanctions on Russia, triggered a cluster of price shocks that permanently altered trade flows for several key partners. The dashboard's volatility and shock-detection module identifies four prominent price-shock events centred on 2022.

Volatility and shock detection

Import price spikes from Türkiye, Viet Nam and China in 2022

Three major import suppliers experienced sharp, temporary price increases in 2022, after which prices partially returned to pre-shock levels:

- **Türkiye:** import prices jumped 18.0 % above the 2020-21 baseline (abnormality 37.7). By 2024-25 prices had settled at a higher plateau (€4 419/tonne vs. €3 436 in 2020-21), reflecting persistent cost pressures.
- **Viet Nam:** prices leapt by 38.5 % in 2022 (to €5 245/tonne) but then receded to around €4 044 in 2025, still above pre-shock norms.
- **China:** the world's largest furniture exporter to the EU registered a 33.2 % price surge in 2022, yet by 2025 its unit value had fallen back to €3 776/tonne, even lower than the 2015 level.

Despite these price fluctuations, import volumes from all three partners continued to expand, underscoring their competitive grip on the EU market.

Export price shocks to Russia, the United States and Canada

On the export side, the severance of normal trade with Russia produced the most dramatic price shift. With sanctions drastically curtailing volumes (tonnage down 85 % between 2021 and 2025), unit prices soared by 91.6 % in the shock year and remained elevated, reaching €18 235/tonne in 2025 – a reflection of exceptional goods still shipped (likely medical or high-end items).

Similarly, exports to the United States and Canada experienced strong price increases in 2022 (+28.3 % and +20.8 %, respectively), after which prices did not return to baseline. The US-bound export price stabilised around €5 917/tonne in 2024-25, compared with €4 267 in 2020-21. These persistent price rises suggest a lasting shift towards pricier, higher-quality shipments to North American markets.

The most volatile flows (in quantity terms) were those to Russia (coefficient of variation 0.60) and from Belarus (CV 0.60 on imports, where quantities collapsed from 81 929 tonnes in 2024 to just 23 tonnes in 2025), illustrating the disruptive force of geopolitical decisions.

A structural upgrade in EU exports: higher prices, lower volumes across all segments

The product breakdown reveals that the EU's export sector is undergoing a qualitative transformation. While export volumes fell in every major sub-chapter except mattresses and bedding, unit values climbed by 20 % to 46 % across the board, indicating a strong shift towards higher-value output.

Export quantities shrink but value holds up – price growth in every segment

The table below summarises the volume, value, and price changes for the six main sub-chapters of CN 94 between 2015 and 2025.

CN-4	Description	Export volume change (%)	Export value change (%)	Export unit price change (%)
9401	Seats (excl. medical)	–11.0	+22.5	+37.7
9402	Medical furniture	–0.8	+35.3	+36.4
9403	Other furniture	–6.9	+13.4	+21.8
9404	Mattresses, bedding	+8.4	+29.4	+19.4
9405	Luminaires & lighting	–32.3	–1.0	+46.0
9406	Prefabricated buildings	–32.1	+7.1	+57.8

Source: EU Trade Dashboard – Product segment breakdown.

Product segment comparison

Lighting (9405) and prefabricated buildings (9406) show the most dramatic volume drops yet still practically maintained or increased their value, propelled by unit price jumps of 46 % and 58 % respectively. Even seats (9401), which lost 11 % of their export tonnage, saw their average price climb by nearly 38 %. This pattern points to a conscious move upmarket: EU producers are selling fewer, but more sophisticated and expensive, pieces.

The rise of Central-Eastern European manufacturing hubs

The geographic concentration of specialisation within the EU underscores this export story. In 2025, the most specialised member states (measured by the Revealed Symmetric Comparative Advantage, RSCA) were:

- Lithuania (RSCA 0.65, RCA 4.64)
- Estonia (RSCA 0.52, RCA 3.20)

• Poland (RSCA 0.50, RCA 2.99)

• Romania (RSCA 0.34, RCA 2.05)

• Portugal (RSCA 0.30, RCA 1.87)

Poland, in particular, saw its extra-EU exports jump 39.9 % (to €3.16 billion), becoming the third-largest EU exporter of CN 94 goods. Meanwhile, traditional western European economies such as Germany and France exhibited only modest export growth (2.7 % and 11.3 %, respectively) and have much lower specialisation scores. The data confirm a relocation of furniture and lighting production towards lower-cost, highly specialised Eastern members, which are increasingly the origin of the EU's high-value exports.

Specialisation and concentration

Conclusion

Between 2015 and 2025, extra-EU trade in furniture and lighting products witnessed a fundamental transformation. The EU's comfortable surplus has been replaced by a growing deficit as low-cost imports – chiefly from China, together with fast-growing shipments from Türkiye and Ukraine – flooded the market with volume. Geopolitical shocks in 2022 produced striking price spikes and disrupted traditional flows, notably the near-disappearance of exports to Russia and the collapse of imports from Belarus. On the export side, EU manufacturers responded not by increasing volumes but by upgrading their product mix, achieving strong price increases across every segment while conceding market share in bulk goods. This structural upgrade was spearheaded by highly specialised Central-Eastern European countries, notably Poland and the Baltic states. The resulting picture is that of an external sector that is more import-dependent and less volume-driven on the export side, but one that is successfully moving towards higher added value.
