EU TRADE EXPLORER

Market evolution: Other furniture (CN 9403) — 2015–2025

Introduction

The EU trade in “Furniture and parts thereof, n.e.s. (excl. seats and medical, surgical, dental or veterinary furniture)” (CN 9403) underwent a profound transformation between 2015 and 2025. The data, sourced from the EU trade dashboard, reveals that the EU shifted from a solid net exporter to a net importer, while imports became more concentrated and volatile. The following report distils this evolution into three central dynamics: the erosion of the EU’s trade surplus, the restructuring of import sources and product mix, and the disruptive price shocks of 2022 that re-routed trade flows.

1. From surplus to deficit: The erosion of the EU’s furniture trade advantage

Export values edged up, but volumes contracted, revealing a price-driven increase

Extra-EU exports of CN 9403 rose from € 11.48 billion in 2015 to € 13.03 billion in 2025, a modest gain of 13.4 % (trade overview). However, over the same period the quantity shipped fell from 3.23 million tonnes to 3.01 million tonnes (−6.9 %). This divergence means the average export price climbed from € 3 555/t to € 4 332/t (+21.9 %), indicating that export growth was entirely driven by higher unit values, not by selling more volume.

Imports surged in both value and volume, halving the trade surplus

Imports from outside the EU surged far more forcefully. Value jumped from € 5.37 billion to € 10.37 billion (+93.2 %) and volume almost doubled, from 2.01 million tonnes to 4.00 million tonnes (+98.9 %). Import prices, by contrast, remained nearly flat, edging down from € 2 668/t to € 2 593/t (−2.8 %). The combined result was a dramatic compression of the external trade balance:

Year	Exports (bn €)	Imports (bn €)	Balance (bn €)
2015	11.48	5.37	+6.12
2020	10.65	6.94	+3.71
2022	14.09	11.07	+3.02
2025	13.03	10.37	+2.66

The surplus shrank by 56.5 % over the full period, from € 6.12 billion to € 2.66 billion.

The EU’s net import reliance flipped from −24.9 % to +43.2 %, underscoring a structural shift

The net-import-reliance indicator, which expresses the trade deficit (or surplus) relative to apparent EU consumption, turned from −24.9 % in 2015 (a net-export position) to +43.2 % in 2024 (net import reliance). This reversal reflects not only the import boom but also the long-term contraction of domestic production: the EU’s furniture output quantity dropped from an estimated 95 million units in 2003 to just 9 million units in 2024 (−90.5 %) and production value fell from € 850 million to € 389 million (−54.3 %) over the same period (production volumes). Together, these figures expose a progressive “hollowing-out” of the EU’s furniture manufacturing base.

2. China’s grip tightens as import sources diversify (and sometimes collapse)

Chinese imports more than doubled in value, accounting for the lion’s share of growth

China remained the dominant extra-EU supplier. Its deliveries climbed from € 2.81 billion in 2015 to € 6.29 billion in 2025 (+123.6 %) (top partners). The share of Chinese imports in total extra-EU imports of CN 9403 rose so markedly that import concentration, measured by the Herfindahl-Hirschman Index (HHI), jumped from 2 945 to 3 847 (+30.6 %) (concentration). In other words, the EU’s furniture import basket became significantly more concentrated in one supplier.

Türkiye, Ukraine, and India rose as secondary suppliers, while Belarus vanished

Several other partners posted strong growth, providing some diversification:

Import partner	2015 (mn €)	2025 (mn €)	Change (%)
China	2 814.9	6 292.9	+123.6
Türkiye	275.8	794.8	+188.1
Ukraine	40.9	431.3	+954.5
Viet Nam	329.1	432.5	+31.4
India	148.2	349.9	+136.1
United Kingdom	370.3	426.1	+15.1
Belarus	32.7	0.0008	−100.0

Ukraine's near-tenfold increase (+954.5 %) stands out, while Belarusian imports collapsed from € 32.7 million to virtually zero following sanctions. These shifts altered the risk profile: the high volatility of Ukrainian supply (coefficient of variation 0.494) and Belarus (0.657) contrasts with the steadier flows from Viet Nam (cv 0.116) and Indonesia (0.184) (volatility).

Metal and wooden furniture imports expanded fastest, with metal furniture volumes up 132 %

The product segment data underline where import growth was strongest (product comparison):

HS sub-heading	2015 qty (t)	2025 qty (t)	Change
Wooden furniture (940360)	700 677	1 237 667	+77 %
Metal furniture (940320)	573 716	1 329 517	+132 %
Wooden bedroom furniture (940350)	193 126	519 594	+169 %
Plastic furniture (940370)	72 406	102 001	+41 %
Furniture of other materials (940389)	56 719	68 271	+20 %
Metal office furniture (940310)	78 005	149 166	+91 %
Non-wood furniture parts (940399)	n/a*	330 535	–

Separate data for parts became available only from 2022.

Metal furniture (940320) overtook wooden furniture (940360) to become the largest imported segment by volume, while bedroom furniture grew at the fastest rate. Importantly, import prices for these segments remained flat or declined slightly (e.g., wooden furniture from € 2 536/t to € 2 316/t), confirming that the EU absorbed far larger quantities without paying a price premium.

3. The 2022 price shock: geopolitics and supply-chain turmoil rewrite trade flows

Export prices to the US and Canada spiked by 32 % and 29 % in 2022, well above long-term trends

In 2022, a powerful price shock hit key export destinations. The unit value of EU furniture exports to the United States rose by 32.0 % above the 2020-2021 baseline, while the average price for Canada climbed 29.4 % (shock events). These jumps were not matched by volume gains: quantities actually fell slightly from their 2021 peak, indicating that the higher prices were largely a pass-through of elevated transport and raw material costs, rather than robust demand.

The Russian market collapsed after sanctions, with quantities plunging 72 % and unit values soaring 93 %

The most dramatic rupture occurred on exports to Russia. Following the 2022 sanctions, the quantity of EU-origin furniture sold to Russia shrank by more than two-thirds, from an average of 132 214 t during the 2020-2021 baseline to only 37 639 t in 2022 and a mere 17 383 t during 2023-2024. Meanwhile the unit price rocketed from € 4 368/t to € 8 436/t (+93.1 %) in 2022 and to € 13 354/t in 2023-2024, reflecting a residual trade of high-end goods that evaded restrictions. The coefficient of variation for Russian exports over the entire period stood at 0.618, the highest among major markets.

Import prices from Vietnam and India surged 40 % and 31 % in 2022, then partially retreated

The supply-side disruptions also hit the import side. The price of Vietnamese furniture spiked by 39.8 % in 2022 before returning to a level still 16.7 % above baseline in 2023-2024. Indian import prices similarly rose 30.9 % in the same year. These shocks were temporary but significant for sectors that had become increasingly reliant on Asian sourcing.

Export reorientation boosted markets like the UAE (+41 %) and Canada (+71 %), while China-bound exports fell

In response to the loss of some traditional outlets, EU exporters shifted focus:

Export partner	2015 (mn €)	2025 (mn €)	Change (%)
United Kingdom	2 156.6	2 592.6	+20.2
United States	1 732.3	2 591.1	+49.6
Switzerland	1 643.1	1 956.2	+19.1
Norway	903.9	947.8	+4.9
China	532.3	413.9	−22.2
Canada	212.7	363.8	+71.1
United Arab Emirates	318.5	449.2	+41.1

Exports to the UAE and Canada grew substantially, partially compensating for the loss of the Russian market and the decline in sales to China (−22.2 %). This geographical rebalancing helped sustain total export value, even though overall export volume continued to shrink.

Conclusion

Between 2015 and 2025, the EU’s external trade in other furniture (CN 9403) underwent a fundamental restructuring. Exports rose only because of higher unit prices, while volumes declined, whereas imports surged in both value and volume, wiping out the traditional trade surplus. China consolidated its role as the dominant supplier, import concentration worsened, and the EU’s net-import reliance turned decisively positive. The 2022 price shocks underscored the fragility of these new trade patterns: export prices to key Western markets spiked, sanctions wiped out the Russian market, and temporary import price surges hit Asian sources. In response, EU exporters diversified towards the UAE and Canada, but the overarching trend remains a growing dependence on a handful of non-EU suppliers. These dynamics signal deep structural changes in Europe’s furniture sector, with implications for both industrial policy and supply-chain resilience.

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

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