EU TRADE EXPLORER

Market evolution: Seats (CN 9401) — 2015–2025

Introduction

This report examines European Union trade in seats and their parts under CN code 9401 (excluding medical, surgical, dental or veterinary seats) with non-EU partners from 2015 to 2025. The code bundles products ranging from aircraft and motor-vehicle seats to upholstered wood-frame chairs and seat parts. It draws exclusively on the figures available in the Tradashboard platform for this product and period.

A Widening Trade Deficit Driven by Asian Imports

The value of EU seat imports has nearly doubled, growing 78 % over the decade

The overall trade balance moved from a modest deficit of € 0.1 billion in 2015 to a shortfall of € 3.7 billion in 2025. Imports reached € 11.3 billion, up from € 6.4 billion, while exports rose only 23 % to € 7.7 billion [General overview].

Imports from top non-EU partners	2015 (€ bn)	2025 (€ bn)	Change (%)
China	3.42	6.20	+81.2
Türkiye	0.39	0.93	+141.5
Viet Nam	0.31	0.48	+53.3
United Kingdom	0.28	0.40	+42.2
Ukraine	0.04	0.18	+306.5
Indonesia	0.14	0.18	+26.9
Bosnia and Herzegovina	0.30	0.21	–30.5

China alone accounted for more than half of total EU imports every year, rising from € 3.4 billion to € 6.2 billion. Türkiye and Viet Nam consolidated their positions as second- and third-tier suppliers.

Export values grew despite falling volumes, thanks to a strong rise in average prices

Export volumes contracted by 11 % (from 720 000 t to 640 000 t), but unit values climbed 38 % (from € 8 690/t to € 11 967/t). This indicates a shift towards higher-value products.

Import prices, in contrast, rose only 11 %, widening the value-for-money gap between what the EU buys and what it sells [General overview].

Geopolitical Pivots and Supply-Chain Volatility

The US and Mexico replace Russia as dynamic export markets, while the UK holds steady

EU exports to Russia collapsed by 67 % (from € 281 M to € 94 M), whereas shipments to the United States grew 51 % to € 1.36 billion and those to Mexico more than doubled, reaching € 216 M. The United Kingdom remained the largest export destination despite a 9 % decline [Top partners by value].

Import sources exposed high volatility, especially after 2020

The coefficient of variation of import quantities reveals very high instability for Belarus (0.92), Morocco (0.46) and the United Kingdom (0.42). Ukrainian supplies surged 306 % over the period, despite war disruptions. Imports from Bosnia and Herzegovina, by contrast, steadily lost ground.

A price shock for Vietnamese imports in 2022 underscored supply-side fragility

An automated shock-detection algorithm flagged a 36.8 % spike in unit values of imports from Viet Nam in 2022 relative to the 2020-2021 baseline. The episode was rated with an abnormality score of 6.0 and affected a flow representing 7 % of EU extra-EU seat imports, illustrating the market's sensitivity to sudden supplier-side adjustments [Top shock events].

European Production Specialisation and Rising Trade Intensity

Eastern Europe dominates seat export specialisation

In 2025, Poland held the highest revealed symmetric comparative advantage (RSCA 0.59, RCA 3.90), followed by Romania (RSCA 0.54), Czechia (0.51), Lithuania (0.50) and Portugal (0.43). In contrast, Luxembourg, Ireland, Malta and Cyprus exhibited negligible specialisation [Most specialised reporters]. The production structure is therefore unevenly distributed, with Central and Eastern European member states acting as the core manufacturing hub.

Domestic production reached a mid-period peak and subsequently declined

EU production of seats (in quantity) rose from 107 million units in 2015 to a high of 139 million in 2018, then fell to 67 million by 2024. In value terms, output grew from € 12.1 billion to € 16.0 billion over the same horizon, indicating a shift towards fewer but more expensive pieces [Production quantities].

Trade intensity and net import reliance have both increased

Trade intensity (extra-EU imports plus exports relative to production) climbed from 2.97 % to 4.10 %, and export propensity rose from 2.03 % to 2.72 %. Over the same period, the net import reliance ratio (trade balance over production) moved from –1.08 % to –1.30 %, indicating a modest but persistent deepening of the EU's dependence on foreign seat supply [Trade intensity].

The market structure remained concentrated on the import side, but diversified on exports

The Herfindahl-Hirschman Index for extra-EU imports stood at 3 185 in 2025, having first risen to 4 075 in 2021 before easing back. Export concentration, by contrast, steadily declined from 1 159 to 940, confirming that the EU sells to a growing variety of destinations while sourcing from a shrinking group of large suppliers [Concentration HHI].

Conclusion

EU trade in seats (CN 9401) between 2015 and 2025 is characterised by a strongly widening deficit, fuelled above all by China's dominant and growing role. Export values rose solely because of price increases, while volumes slipped. The geography of trade has been reshaped by sanctions on Russia and the strengthening of relations with the US and Mexico, and the vulnerability of certain supply chains was laid bare by the 2022 Vietnamese price shock. Internally, Central and Eastern European countries such as Poland, Czechia and Romania have emerged as the main export-oriented producers, even as overall trade intensity and net reliance on foreign suppliers have crept upward.

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

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.