Market evolution: Sporting goods (CN 9506) — 2015–2025

Introduction

The customs code CN 9506 groups a wide range of sporting and outdoor articles: from gym and athletics equipment, skis and surfboards to balls, table-tennis gear and swimming pools. Between 2015 and 2025 the EU's external trade in these goods expanded strongly in value and volume, but imports grew faster than exports, widening the trade deficit and increasing the Union's reliance on foreign suppliers. This report describes the main trends, identifies the key partner-country shifts and examines how price dynamics and product specialisation shaped the market, using data from the OEC Trade Dashboard.

1. Surging trade and a deepening deficit: the EU as a net importer of sporting goods

Both exports and imports grew, but the trade gap widened substantially

Over the eleven-year window, EU exports of CN 9506 increased from €1 680.6 million to €2 554.0 million, a rise of 52.0 %. Imports jumped from €3 286.6 million to €5 186.2 million, a 57.8 % advance. Consequently the trade deficit, which stood at €-1 606.0 million in 2015, deepened to €-2 632.2 million in 2025, an increase of 63.9 %. The largest deficit occurred in the pandemic-affected year 2021, when it exceeded €-4 007 million (see overview trade data).

Indicator	2015	2025	Change
Exports (€ m)	1 680.6	2 554.0	+52.0%
Export quantity (t)	159 590	203 537	+27.5%
Export unit price (€/t)	10 531	12 548	+19.2%
Imports (€ m)	3 286.6	5 186.2	+57.8%
Import quantity (t)	628 357	1 031 232	+64.1%
Import unit price (€/t)	5 230	5 029	–3.9%
Trade balance (€ m)	–1 606.0	–2 632.2	–63.9%

Export growth was driven by both volume and price, import growth purely by volume

EU exports benefited from a 19.2 % rise in unit values, on top of a 27.5 % quantity increase. In contrast, the import price fell by 3.9 %, meaning the entire import expansion was volume-based; import quantities soared by 64.1 %. This divergence underlines the EU's role as a high-value supplier of sporting goods and a large market for volume-oriented production from lower-cost countries.

Net import reliance more than doubled, peaking during the pandemic

Net import reliance – the share of domestic demand met by imports – rose from 16.2 % in 2015 to 34.1 % in 2024 (the last available year), a 110.4 % increase. It temporarily spiked to 50.7 % in 2021, reflecting a Covid-linked import boom that far outpaced EU production and exports growth.

2. Geographical rebalancing: from proximate partners to Asian manufacturing giants

China tightened its grip on the EU import market

China remained by far the largest external supplier. Its sales to the EU increased from €1 985.2 million in 2015 to €3 596.8 million in 2025 (+81.2 %), and at their 2021 peak reached €4 917.0 million. As the table below shows, other Asian economies also gained market share, while the United Kingdom lost ground after Brexit.

Top import partners	2015 (€ m)	2025 (€ m)	Change
China	1 985.2	3 596.8	+81.2%
Taiwan	222.6	201.7	–9.4%
United Kingdom	295.5	229.9	–22.2%
United States	266.9	286.7	+7.4%
Pakistan	101.9	163.5	+60.4%
Thailand	89.2	138.8	+55.7%
Viet Nam	44.2	118.5	+168.0%

(Source: top partners)

China's increasing dominance pushed the import-side HHI concentration index from 3 867 to 4 941 (+27.8 %). The HHI peaked at 5 839 in 2021, reflecting extreme reliance on a single supplier during the post-pandemic demand surge.

The United Kingdom's role as an import source declined sharply after Brexit

Once a top-three provider, the UK's shipments to the EU fell from €295.5 million in 2015 to €229.9 million in 2025, a drop of 22.2 %. The steepest part of the decline occurred after 2020, when the UK formally left the Single Market, and the series shows a sustained lower level thereafter.

EU exports shifted towards the US, Switzerland and China, while nearby markets retained importance

The EU diversified its export destinations. Shipments to the United States rose 54.5 % (to €452.9 million), to Switzerland 59.8 % (to €364.9 million) and to China a remarkable 150.5 % (to €114.2 million). The United Kingdom remained the largest single export market (€353.2 million, +22.8 %), followed by the US. At the same time, exports to Japan fell by 29.9 %.

Top export partners	2015 (€ m)	2025 (€ m)	Change
United Kingdom	287.6	353.2	+22.8%
United States	293.2	452.9	+54.5%
Switzerland	228.4	364.9	+59.8%
Norway	116.4	158.9	+36.5%
Australia	38.7	66.5	+71.8%
China	45.6	114.2	+150.5%
Japan	77.9	54.6	–29.9%

(Source: top partners)

The export-side HHI declined slightly from 923 to 840, indicating that the EU's customer base became marginally more dispersed, in contrast to the increasing concentration of imports.

3. Value dynamics and sectoral specialisation: price divergence and the rise of fitness and winter sports

A sharp price shock in 2022 affected Chinese imports and key export destinations

Volatility analysis shows that Chinese imports exhibited a coefficient of variation (CV) of 0.319 in quantity terms, one of the highest among large suppliers. A detected price shock in 2022 saw the average import price from China jump by 47 % relative to the 2020-2021 baseline, from €3 595/t to €5 285/t, while volumes contracted. On the export side, prices to

Switzerland surged 29.3 % in the same year, and those to the UAE rose 43.5 %. These price jumps proved persistent: in 2023-2024 post-shock prices remained well above the pre-shock baseline for all three flows.

Fitness and exercise equipment dominated imports; winter sports gear led exports

The product-segment breakdown reveals a clear division.

Top import sub-headings in 2025 (value)

Code	Description	Value (€ m)
950691	Gym, gymnastics and athletics equipment	2 251.1
950699	Sport/outdoor games n.e.s.; swimming pools	1 009.4
950629	Water-skis, surfboards, water-sport equipment	392.6
950662	Inflatable balls	284.1
950670	Ice and roller skates	137.7

Top export sub-headings in 2025 (value)

Code	Description	Value (€ m)
950699	Sport/outdoor games n.e.s.; swimming pools	801.7
950691	Gym, gymnastics and athletics equipment	885.1
950611	Skis, for winter sports	300.4
950640	Table-tennis equipment	36.1
950629	Water-skis, surfboards, water-sport equipment	147.4

Imports were heavily concentrated in general fitness and athletics articles (950691), which alone accounted for 43 % of total import value in 2025. Exports, while also strong in those segments, had a notable specialisation in winter sports – skis (950611) and ski bindings (950612) – and table-tennis goods (950640), where the EU maintains a revealed comparative advantage.

Within the EU, several smaller economies displayed high export specialisation

According to the 2025 revealed-comparative-advantage (RCA) data, Austria (RCA 2.14), Bulgaria (RCA 2.19), the Netherlands (RCA 1.43), France (RCA 1.40) and Spain (RCA 1.34) are the most specialised in exporting these goods. In contrast, Malta, Cyprus and Ireland show extremely low specialisation, with RCA values below 0.03. The EU’s aggregate export strength therefore rests on a limited number of predominantly Western and Alpine manufacturing hubs.

Conclusion

Between 2015 and 2025, EU trade in sporting goods expanded markedly, but the benefits were asymmetric. Imports, fed by surging volumes from China and emerging Asian suppliers, grew faster than exports, widening the deficit and pushing net import reliance above one-third. Supplier concentration increased, while export markets became slightly more diversified. A pronounced price shock in 2022 lifted unit values across several key flows, and the product-level data show that the EU's trade is split between high-volume fitness and aquatic imports and higher-value exports of winter sports and specialised equipment. These dynamics highlight both the EU's competitive strengths in premium sporting goods and its deepening dependence on external supply chains for mass-market articles.

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