# Market evolution: Sports equipment and toys (CN 95) — 2015–2025

## Introduction

This report covers EU external trade in chapter 95 of the Combined Nomenclature – toys, games, sports requisites, and their parts and accessories – over the period from 2015 to 2025. The data, drawn from the General trade overview, show a market where imports consistently outweigh exports, while both flows expanded strongly. This analysis first examines the headline trade performance, then the reconfiguration of partner countries, and finally the product-level shifts that defined the decade.

## Robust export growth fails to close the widening trade deficit

### The EU's exports grew strongly in value, yet imports expanded even faster, leading to a deeper negative balance.

Between 2015 and 2025, extra-EU exports rose from €5.84 bn to €8.59 bn (+47.2 %), while imports increased from €14.53 bn to €21.40 bn (+47.3 %). As a result, the trade deficit widened from –€8.69 bn to –€12.80 bn, a –47.3 % deterioration.

| Flow | 2015 (€ bn) | 2025 (€ bn) | Change (%) |
|---|---|---|---|
| Exports | 5.84 | 8.59 | +47.2 |
| Imports | 14.53 | 21.40 | +47.3 |
| Balance | –8.69 | –12.80 | –47.3 |

*Source: General trade overview*

### Exports are characterised by higher unit prices, while imports rely on volume growth.

Export volumes increased only modestly (+8.2 %) and the export unit price jumped by 36.0 %, reaching €18,985 per tonne in 2025. Import volumes surged by 53.9 %, but the average import price edged down by 4.3 %, indicating a supply of cheaper goods. The EU thus specialises in higher-value products shipped abroad, whereas it absorbs large quantities of lower-priced items.

### The Netherlands and Germany anchor both import and export activity among EU Member States.

On the import side, the Netherlands (€3.87 bn → €6.01 bn) and Germany (€2.96 bn → €3.72 bn) lead, with Poland recording the fastest relative growth (+196.6 %). In exports, Germany (€1.06 bn → €1.31 bn) and the Netherlands (€0.61 bn → €1.10 bn) again top the list, though Czechia remained a major exporter despite a –18.9 % decline.

*Source: Top reporters*

## China's dominance persists, but Vietnam rises as Brexit redirects flows

### China alone supplies a large majority of extra-EU imports, yet its share has stabilised.

Imports from China grew from €10.43 bn to €15.96 bn (+53.1 %), and the import concentration (HHI) remained very high, ending at 5,686 after a peak of 6,036 in 2021. The Concentration overview confirms a supplier structure dominated by one player.

### Vietnam's shipments to the EU exploded, making it the fourth-largest source.

Imports from Viet Nam shot up by 500.3 %, from €0.13 bn to €0.79 bn, reflecting a major relocation of labour-intensive toy and game production. India (+133.1 %) and Thailand (+58.6 %) also gained ground, providing modest diversification.

| Import partner | 2015 (€ bn) | 2025 (€ bn) | Change (%) |
|---|---|---|---|
| China | 10.43 | 15.96 | +53.1 |
| Viet Nam | 0.13 | 0.79 | +500.3 |
| United Kingdom* | 1.44 | 0.57 | –60.1 |
| United States | 0.56 | 0.70 | +24.8 |

*The UK's drop stems from its departure from the EU single market and customs union.

*Source: Top partner breakdown*

### EU exports find their main outlets in wealthy neighbouring countries and the United States.

The United Kingdom remained the top destination (€1.43 bn → €1.99 bn, +39.5 %), despite Brexit. The United States absorbed €1.30 bn in 2025 (+80.0 %), and Switzerland €0.99 bn (+74.7 %). Meanwhile, sales to Russia collapsed by –67.8 % due to sanctions, falling from €0.36 bn to €0.12 bn.

### Export partner concentration is low and stable, contrasting with imports.

The export HHI started at 996 and ended at 1,012, never exceeding 1,200. The Concentration overview highlights a well-diversified customer base, reducing exposure to individual markets.

## Video games and sports gear drive value, reshaping the product mix

### While toys remain the largest import segment, video game hardware recorded the most dynamic value shifts.

Toys (9503) imports rose from €5.59 bn to €7.33 bn, but video games and casino equipment (9504) jumped from €4.25 bn to €6.61 bn, with a peak of €8.63 bn in 2023. Sports and fitness equipment (9506) grew from €3.29 bn to €5.19 bn. The Product segment comparison shows how the composition moved toward higher-technology items.

| CN4 code | Description | Imports 2015 (€ bn) | Imports 2025 (€ bn) |
|---|---|---|---|
| 9503 | Toys, tricycles, puzzles | 5.59 | 7.33 |
| 9504 | Video game consoles, games | 4.25 | 6.61 |
| 9506 | Sports & gymnastics equip. | 3.29 | 5.19 |

### EU exports of video games and sports equipment command premium prices.

Export unit prices for video game hardware (9504) soared from €23,413/t to €42,932/t, and sports equipment (9506) increased from €10,531/t to €12,677/t. Toy export prices also rose (from €14,281/t to €19,199/t). These trends underline the EU's position as a supplier of high-quality, brand-intensive goods.

### A price shock for Chinese imports in 2022 illustrates supply-chain vulnerability.

The Volatility and shocks overview detects a sharp 44.5 % price spike for Chinese imports in 2022, driven by pandemic disruptions and logistics bottlenecks. The event raised the average import price from €10,103 t that year, before it partially corrected.

## Conclusion

Over the 2015–2025 period, EU trade in toys, games and sports equipment expanded in both directions, but the import bill grew faster, deepening the deficit. China remained the unrivaled supplier, while Vietnam emerged as a significant new source. On the export side, the EU successfully sold high-value products to advanced economies, with video games and sports gear leading the value gains. The product mix evolved accordingly, and the 2022 price shock highlighted the sector's sensitivity to global supply-chain tensions. The data point to an EU role as a high-end exporter in a market otherwise dominated by low-cost Asian manufacturing.

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Generated on 2026-07-24 based on data from tradedashboard.eu

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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.