EU TRADE EXPLORER

Market evolution: Video game consoles and machines (CN 9504) — 2015–2025

Introduction

This report examines European Union trade in video game consoles, amusement machines, casino tables, billiards, playing cards, and similar items (customs code 9504) with non-EU countries from 2015 through 2025. Over the decade the value of EU exports rose by 85 %, while the quantity shipped barely changed. Imports grew more moderately in value (+55 %) but nearly doubled in volume, leading to a sharply expanded trade deficit. Behind the headline numbers lie a profound restructuring of supplier relationships, a shift in the EU's role from producer to re-export hub, and large price shocks on key export markets. The following sections dissect these dynamics.

General overview on the dashboard

Stark divergence between export price inflation and import volume expansion

Export unit prices nearly doubled while quantities stagnated, inflating total export value.

EU exports of CN 9504 goods grew from €1.21 billion in 2015 to €2.24 billion in 2025 (a rise of 85 %). Over the same period, exported tonnage rose by a negligible 0.8 %, meaning the average export price jumped from €23,401 / tonne to €42,929 / tonne (+83 %). The value expansion is therefore entirely price-driven, pointing to a shift toward higher-unit-value products or price mark-ups on existing categories.

Import quantities soared as average prices fell, indicating cheaper sourcing.

Imports reached €6.61 billion in 2025, up 55 % from €4.25 billion in 2015. However, the volume of imports surged from 127,951 tonnes to 249,343 tonnes (+95 %), while the average import price dropped from €33,253 / tonne to €26,524 / tonne (−20 %). The EU was thus able to source vastly larger quantities at a lower unit cost, benefiting from global price competition or a change in product mix toward less expensive items.

The trade deficit widened considerably, sustained by heavy imports of video game consoles.

The annual trade balance deteriorated from −€3.04 billion in 2015 to −€4.37 billion in 2025. The deficit is overwhelmingly concentrated in subcategory 950450 (video game consoles and machines not operated by any means of payment), where imports alone reached €4.86 billion in 2025 — more than three-quarters of total imports — while exports of the same subcategory remained below €1 billion.

Trade overview | Product segment comparison

Geopolitical shocks and supply-chain realignment reorder partner rankings

China reinforced its dominant import role while Vietnam emerged as a new sourcing powerhouse.

China provided €4.81 billion of the EU's imports in 2025, up from €3.06 billion in 2015 (+57 %), and by itself accounts for over 70 % of total extra-EU imports of CN 9504. The most dramatic change, however, is the rise of Vietnam: imports soared from a negligible €1.2 million to €160 million, a more than 130-fold increase. Vietnam has become a viable alternative assembly location for consoles and electronic games.

Brexit and sanctions triggered the collapse of UK and Russian trade.

The United Kingdom, once the second-largest source of imports (€540 million in 2015), fell to just €82 million in 2025 (−85 %), reflecting post-Brexit trade friction and the relocation of distribution hubs. On the export side, the Russian Federation — formerly a top-five destination — shrank from €78.7 million to €4.1 million (−95 %) following EU sanctions and business withdrawals after 2022.

Export destinations diversified toward the Americas, Switzerland, and Türkiye.

The United Kingdom remained the EU's top export partner (€523 million in 2025), but the United States recorded the fastest growth among major markets, climbing from €110 million to €316 million (+188 %). Shipments to Switzerland grew by 130 % to €238 million, to Türkiye by 241 % to €88 million, and to Mexico by 169 % to €88.8 million. These shifts reduced export concentration: the Herfindahl-Hirschman Index for exports fell from 1,364 to 974, signalling a more balanced customer portfolio.

The EU as a re-export hub: rising external dependency with growing internal specialisation

The Netherlands and Poland stand out as highly specialised in CN 9504 trade.

In 2025 the Netherlands exhibited the highest revealed symmetric comparative advantage (RSCA = 0.365) and accounts for 31 % of all extra-EU exports of the product. Poland (RSCA = 0.342) and Spain (RSCA = 0.272) also show strong specialisation. Together these three member states handle more than half of the EU's external sales, underscoring their role as logistics and re-export hubs for goods that often originate outside the EU.

Specialisation map

Net import reliance surpassed 70 % in 2024, revealing deep external dependency.

The EU's net import reliance ratio — measuring the share of apparent consumption met by non-EU imports — rose from 64.2 % in 2015 to 70.1 % in 2024. Peak levels of 82.3 % were recorded in 2023. This high and rising reliance makes the EU sensitive to supply disruptions, especially given the concentration of imports from China (HHI above 5,400).

Net import reliance

Export propensity more than doubled, highlighting the EU's redistribution role.

Export propensity (exports as a percentage of EU production) jumped from 71.7 % in 2015 to 158.9 % in 2024. An export propensity above 100 % signals that the EU exports more than it produces — a direct consequence of large-scale re-exports. This is particularly visible in the Netherlands, which imports vast quantities of consoles from Asia and re-ships them across Europe and globally.

Export propensity

Domestic production of CN 9504 goods shrank in value despite volume growth.

EU production quantity edged up from 174.9 million units in 2015 to 183.2 million in 2024, but the value of production fell from €1.69 billion to €1.31 billion. This suggests downward pressure on factory prices or a move toward lower-value items within the product mix. The combination of volatile production volumes and strong import penetration points to a limited domestic manufacturing base for the highest-value segments such as video game consoles.

Production volumes

Conclusion

The EU’s trade in CN 9504 from 2015 to 2025 was marked by a striking asymmetry: export values rose almost entirely on the back of higher unit prices while import volumes exploded thanks to falling unit costs. China maintained a commanding import share, though Vietnam appeared as a notable alternative source. Brexit and sanctions reshaped the partner landscape, erasing the UK as an import hub and Russia as an export market, while the United States and several emerging economies absorbed greater EU sales. The EU has evolved into a re-export platform, with the Netherlands, Poland, and Spain taking centre stage. This hub-and-spoke model brought a sharp rise in net import reliance and an export propensity exceeding 100 % by 2024. Although the diversity of export destinations improved, the persistently high import concentration on China and the structural trade deficit in video game consoles remain key vulnerabilities that warrant close monitoring.

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