EU TRADE EXPLORER

Market evolution: Carpets and textile floor coverings (CN 57) — 2015–2025

Introduction

Carpets and other textile floor coverings (CN 57) represent a mature but dynamic sector within EU external trade. Over the 2015–2025 period, the European Union’s position shifted decisively from net exporter to net importer, with import volumes surging while export volumes contracted sharply. This report examines the key dynamics—collapsing trade surplus, shifting geographic patterns, falling domestic production and increasing external dependence—drawing solely on the figures from the Eurostat-derived dashboard.

1. From surplus to deficit: the erosion of the EU’s trade balance

The trade balance swung from a surplus of €473.5 million to a deficit of €387.1 million

In 2015 extra-EU trade in carpets generated a surplus of €473.5 million. By 2025 the balance had reversed to a deficit of €387.1 million, a swing of -181.8 % (Trade flows). The deterioration was not linear: the surplus held above €400 million until 2019, then contracted during the pandemic and turned negative after 2021 as imports raced ahead.

Import growth outpaced exports by a wide margin in both value and volume

EU imports rose 46.7 % in value (€1.31 billion to €1.92 billion) and 67.0 % in quantity (320 thousand tonnes to 535 thousand tonnes). Meanwhile, exports fell 14.0 % in value (€1.78 billion to €1.53 billion) and 30.8 % in quantity (438 thousand tonnes to 303 thousand tonnes). The result was a rapid compression of the EU’s traditional export-oriented footprint.

Unit values tell a contrasting story: exports are becoming more expensive, imports cheaper

Export unit prices climbed 28.0 % (from €3 958 /t to €5 066 /t), while import prices decreased 11.8 % (from €4 069 /t to €3 589 /t). This suggests the EU is concentrating on higher-value segments while sourcing larger volumes of lower-priced products from abroad.

2. Geographic reorientation: diversified supply sources and a rebalancing of export markets

Asian suppliers dominate imports, with Viet Nam registering explosive growth

China, Türkiye and India remain the three largest extra-EU suppliers. In 2025, China accounted for €513 million of imports (+85.3 % since 2015), India €399 million (+43.0 %) and Türkiye €384 million (+25.3 %). The most dramatic change occurred with Viet Nam: imports leapt from just €176 thousand in 2015 to €105 million in 2025, a 59 743 % increase (Top partners). Such expansion signals the entry of a new low-cost production hub into the EU market.

The United Kingdom remains the top export destination but its weight is declining

Exports to the UK fell 35.9 % in value, from €847 million to €543 million. Despite that, the UK was still the EU's largest market in 2025. The decline was part of a deliberate diversification: the export HHI (Concentration (HHI)) dropped from 2 531 to 1 614 (-36.2 %), indicating a much less concentrated export portfolio. Among gainers, Switzerland (+31.0 % to €154 million) and Norway (+23.4 % to €81 million) grew steadily, while exports to Russia collapsed by 55.8 % following the sanctions imposed after 2022.

The sourcing and export roles of individual EU Member States are highly polarised

Belgium, the largest extra-EU exporter in 2015 (€704 million), saw its exports halved to €334 million (-52.6 %). In contrast, the Netherlands maintained a stable export level (€439 million to €443 million) while imports surged 173.1 %, reinforcing its role as a logistic hub. Sweden's exports nearly doubled (+95.6 % to €85 million). On the import side, Germany remained the biggest buyer (€448 million in 2025), followed by fast-growing markets in the Netherlands, France and Spain.

3. Structural vulnerabilities: falling domestic production, price shocks and growing import dependence

EU production of carpets shrank dramatically, deepening reliance on foreign supply

Domestic production quantity fell from 457.8 million units in 2015 to 313.5 million in 2024 (-31.5 %), while production value declined from €3.21 billion to €2.90 billion (-9.5 %). The longer-term picture is even starker: production quantity had already dropped from 860 million in 2003. This contraction pushed the trade intensity ratio (exports + imports / production) from 46.6 % in 2015 to 66.3 % in 2024 (Trade intensity), meaning that almost two-thirds of the EU's carpet supply is now traded across its borders.

The EU became a net importer for the first time in the observed period

Net import reliance, negative at -18.5 % in 2015 (i.e. net exporter), moved into positive territory during 2022 and reached +5.8 % in 2024 (Net import reliance). This indicates that domestic consumption can no longer be fully met by EU producers and is increasingly covered by imports.

Price shocks from key Asian suppliers added inflationary pressure

The dashboard's price-shock analysis detected two significant events in 2022: Indian import prices jumped 15.9 % above the baseline (abnormality score 46.4), while Chinese import prices rose 35.1 % (abnormality 8.5) (Top shock events). Although prices have since moderated, the episode exposed the vulnerability of relying on a small set of suppliers. At the same time, the volatility of imports from Viet Nam (coefficient of variation 1.03 on quantity) highlights the rapid but unpredictable build-up of new supply chains (Volatility bars).

Conclusion

Between 2015 and 2025, the EU's external trade in carpets and textile floor coverings underwent a fundamental transformation. A long-standing surplus turned into a deficit, driven by a surge in imports from Asia—especially China, India and the emerging supplier Viet Nam—and a simultaneous fall in export volumes. EU producers reacted by specialising in higher-value products, yet domestic output contracted sharply, and trade intensity soared. The result is an increasingly open sector that is more exposed to supply-side shocks and less self-sufficient than a decade ago. The data thus point to a structural shift whose policy implications for industrial resilience and strategic autonomy deserve close attention.

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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.