Market evolution: Feathers and artificial flowers (CN 67) — 2015–2025

Introduction

Between 2015 and 2025, EU trade in prepared feathers, down, artificial flowers, wigs and related articles (CN 67) expanded rapidly, but the gains were highly asymmetric. Exports rose by 76.8 %, from €83.9 million to €148.3 million, while imports more than doubled (+104.7 %), climbing from €592.0 million to €1,211.6 million (EU trade overview). As a result, the EU's trade deficit in this category widened by 109.3 %, reaching –€1,065.3 million in 2025. The product group is overwhelmingly import-driven, with net import reliance hovering around 75 % throughout the period (Net import reliance). This report unpacks the forces behind the deficit, the structural transformation of EU production and exports, and the shocks that have shaped trade patterns.

1. A widening trade deficit driven by surging low-cost imports

China supplies the vast majority of EU imports, but Vietnam and Senegal emerge as fast-growing alternatives

China's dominance is the single most important feature of EU imports. Chinese deliveries grew from €455.5 million in 2015 to €1,043.3 million in 2025, a jump of 129.0 % that captured most of the total import expansion (Top trading partners). Meanwhile, several secondary suppliers recorded even faster, though much smaller, increases:

- Viet Nam: +547.4 % (€2.4 M → €15.8 M)
- Senegal: +350.1 % (€3.1 M → €14.0 M)
- Indonesia: +65.8 % (€22.7 M → €37.6 M)

Traditional partners such as Hong Kong (–71.8 %) and the United Kingdom (–50.6 %) lost ground, the latter partly reflecting its departure from the EU single market.

Import unit values slide by 14.8 % while supplier concentration rises

In 2015 the EU paid an average of €11,326 per tonne for CN 67 imports; by 2025 that figure had dropped to €9,651 per tonne (–14.8 %). Over the same window import volumes soared by 140.2 % (from 52 260 t to 125 519 t). The combination of falling unit prices and swelling volumes points to abundant, competitively priced supply, particularly from China. The Herfindahl-Hirschman Index (HHI) for import values rose from 5 995 to 7 652 (+27.6 %), indicating that Europe's sourcing became more concentrated, not less (Concentration & specialisation).

Artificial flowers and wigs account for the bulk of the import surge

Disaggregating by product sub-heading (Product segment compare) shows that artificial flowers, foliage and fruit (6702) and wigs, false beards and similar articles (6704) dominate import growth:

HS-4	Product	Import value 2015 (M €)	Import value 2025 (M €)	Change
6702	Artificial flowers, foliage	368.6	769.5	+108.6 %
6704	Wigs, false beards, etc.	167.2	313.8	+87.7 %
6701	Feathers and down articles	14.0	14.2	+1.5 %
6703	Worked human hair	41.8	33.9	–18.8 %

Both 6702 and 6704 saw import prices decline (by –13.4 % and –8.2 % respectively), reinforcing the picture of cheap, mass-produced inflows.

2. From volume to value: the transformation of EU production and exports

Domestic production value rises substantially as low-volume, high-value output replaces mass-manufactured goods

Long-run production data show a striking shift. Between the first available year (2003) and 2024, EU output of CN 67 goods fell 52.9 % in quantity but rose 149.8 % in value (Production volumes). Even in the more recent 2015-2024 window, value added continued to expand, reaching €321.9 million in 2024. The implicit unit value of EU production therefore climbed from well under €1 per item in the early 2000s to more than €1.35 in 2024, reflecting a strategic repositioning toward higher-quality, often design-intensive goods.

Exports of artificial flowers and wigs more than double, while human hair unit values skyrocket

EU export performance mirrors the upmarket shift. Total exports rose to €148.3 million in 2025, with volume up 72.6 % and average export price stable (+2.3 %). The mix, however, changed considerably:

HS-4	Export value 2015 (M €)	Export value 2025 (M €)	Change	Export price change
6702	33.5	66.5	+98.6 %	+10.3 %
6704	27.0	59.9	+121.8 %	+0.2 %
6701	2.9	7.1	+140.0 %	+87.0 %
6703	19.3	17.5	–9.6 %	+136.3 %

The steep drop in exported volume of worked human hair (6703) – from 76 t to 29 t – was more than compensated by an explosion in unit value from €253 600/t to €599 100/t, illustrating how niche, premium hair products have replaced bulk shipments. Export propensity rose from 35.4 % to 46.7 %, meaning EU producers are selling a larger share of their output abroad (Export propensity).

Exports diversify beyond traditional partners: China and Serbia among the fastest-growing destinations

The geographical pattern of EU exports reveals both enduring relationships and new opportunities. The United Kingdom remained the top market (€17.2 M → €25.2 M; +46.0 %), and nearby high-income countries such as Switzerland (+86.4 %) and Norway (+53.3 %) absorbed growing amounts. Remarkably, EU exports to China surged by 559.5 % (€3.8 M → €25.1 M) despite China's own vast production, pointing to demand for specialised or branded European goods. Exports to Serbia climbed 573.9 % (€0.4 M → €2.6 M), while sales to Russia tumbled 45.8 % under the impact of sanctions.

3. Navigating shocks: volatility and geopolitical disruptions

A 250 % export price shock to China in 2021 highlights extreme segment volatility

EU exports to China are not only fast-growing but also exceptionally volatile (coefficient of variation 1.17) (Volatility overview). The most dramatic event was a price shock in 2021, when the average export price leapt by 249.8 % to €272 363/t while volume collapsed to just 30.5 t (Price shock events). This likely reflects a one-off trade flow of very high-value items (probably premium wigs or hair products) rather than a structural price change, but it underscores how thin markets can generate outsized statistical swings.

Russia's invasion of Ukraine slashes exports to Russia and triggers a price jolt in Ukraine

The conflict had clear trade repercussions. EU exports to the Russian Federation shrank from €4.6 M in 2015 to €2.5 M in 2025 (–45.8 %), with the steepest falls after 2022. Meanwhile, shipments to Ukraine experienced a price shock in 2020 (+44.2 %), but volumes subsequently strengthened, rising from 16.2 t in 2015 to 281.6 t in 2025, suggesting a reorientation of supply chains and sustained demand despite the war.

Supply-chain pressures in 2022 push export prices up sharply for Norway and Switzerland

In 2022, two of the EU's largest and normally stable export markets registered significant price shocks:

- Norway: +21.7 % export price increase (value share 14.8 %).
- Switzerland: +21.2 % increase (value share 17.0 %).

Both episodes were temporary, with prices moderating in subsequent years. On the import side, China also exhibited a positive price shock in 2022 (+29.8 %), although the long-run trend for Chinese import prices remains downward. These synchronous 2022 spikes align with global logistic bottlenecks and cost surges that temporarily lifted traded prices worldwide.

Conclusion

EU trade in CN 67 has expanded vigorously over the last decade, but the benefits have been uneven. While EU exports are growing and moving upmarket – with production value rising, export propensity increasing and unit values for key segments such as human hair climbing steeply – the bloc's import dependence remains entrenched. Cheap, high-volume imports from China, supplemented by rising flows from Viet Nam, Senegal and Indonesia, have pushed the trade deficit beyond €1 billion. Import concentration has intensified, leaving the EU exposed to supply-side disruptions. The extreme export price shock to China in 2021 and the 2022 price spikes in European markets further illustrate the sector's vulnerability to sudden shifts. Looking ahead, continued focus on product differentiation, market diversification and supply-chain resilience will be essential to narrow the deficit and reduce the risks inherent in a highly concentrated import portfolio.
