# Market evolution: Footwear and parts (CN 64) — 2015–2025

## Introduction

This report examines the evolution of the European Union's external trade in footwear, gaiters, and parts thereof (CN 64) between 2015 and 2025. Drawing on official trade statistics, it identifies structural shifts in sourcing, export specialisation, and the product-level composition of trade. The period under review covers the aftermath of the COVID-19 pandemic, the UK's departure from the EU single market, and a sharp revaluation of EU exports.

## A Growing but Qualitatively Transforming Trade Deficit

The EU's footwear trade deficit widened substantially over the decade, yet the underlying trends reveal a strong bifurcation between value and volume dynamics on the import and export sides.

### The overall deficit expanded by 20.4 %, driven by import volume growth and divergent unit values.

Between 2015 and 2025, the trade deficit rose from € 7.1 billion to € 8.6 billion (General Overview). Import value increased by 29.1 %, from € 18.3 billion to € 23.6 billion, while export value rose by 34.7 %, from € 11.1 billion to € 15.0 billion.

**Table 1 – Headline trade indicators, 2015 vs 2025**

| Indicator | 2015 | 2025 | Change |
|---|---|---|---|
| Imports (€ bn) | 18.28 | 23.61 | +29.1 % |
| Exports (€ bn) | 11.14 | 15.00 | +34.7 % |
| Trade balance (€ bn) | –7.15 | –8.60 | –20.4 % |
| Import quantity (t) | 1 197 595 | 1 502 140 | +25.4 % |
| Export quantity (t) | 293 432 | 237 337 | –19.1 % |
| Import unit value (€/t) | 15 265 | 15 715 | +2.9 % |
| Export unit value (€/t) | 37 947 | 63 212 | +66.6 % |

### Import growth was volume-driven while export growth was overwhelmingly price-driven.

Import quantity grew by a quarter over the period, whereas import unit values barely moved, indicating that the EU continues to source large volumes of competitively priced footwear. Export quantity, by contrast, contracted by almost one-fifth, yet export unit value surged by two-thirds. This points to a strong upgrading of the EU’s footwear offer towards higher-priced, added-value segments.

### The product-level breakdown confirms a focus on high-unit-value leather footwear in exports.

In 2025, leather footwear (CN 6403) accounted for 59.7 % of total EU footwear export value and commanded an average unit value of € 90 151 per tonne (Product Segment Breakdown). The next largest export segment, textile-upper footwear (CN 6404), reached € 3.2 billion with a unit value of € 78 263 per tonne. On the import side, leather footwear also ranked first in value (€ 7.3 billion), but it was closely followed by textile-upper (€ 7.7 billion) and rubber/plastic footwear (CN 6402, € 5.9 billion), all with significantly lower unit values than their export counterparts.

## Geopolitical Reorientation of Trade Partners

The supplier and customer maps have been reshaped by Brexit, sanctions, and the rapid rise of South-East Asian sourcing.

### Imports from the United Kingdom collapsed after Brexit, while Vietnam consolidated its position as a primary supplier.

UK shipments fell from € 1.4 billion in 2015 to € 0.4 billion in 2025 (–72.7 %), with the most abrupt drop occurring in 2021 (Top partners). Over the same period, imports from Vietnam more than doubled (+112.4 %), reaching € 6.7 billion, and those from Cambodia rose by 125.5 % to € 0.7 billion. China remained the largest import partner with € 8.5 billion in 2025, although its share has eroded relative to faster-growing rivals.

**Table 2 – Top five import partners, value (€ bn)**

| Partner | 2015 | 2025 | Change |
|---|---|---|---|
| China | 7.56 | 8.53 | +12.8 % |
| Viet Nam | 3.15 | 6.68 | +112.4 % |
| Indonesia | 1.37 | 1.66 | +20.6 % |
| India | 1.04 | 1.09 | +4.1 % |
| United Kingdom | 1.44 | 0.39 | –72.7 % |

### EU exports shifted decisively towards the United States and Switzerland, while Russia faded.

Exports to the United States grew by 81.0 %, from € 1.7 billion to € 3.0 billion, making it the EU's top export destination by 2025. Switzerland absorbed € 2.1 billion (+56.4 %) and Türkiye € 0.8 billion (+123.3 %). In contrast, shipments to the Russian Federation fell by 37.1 % in value terms, reflecting the impact of sanctions and trade restrictions. The United Kingdom, despite remaining the second-largest market in value, saw a 32.1 % decline in EU footwear exports.

### Import concentration remained high while export markets became more diversified.

The Herfindahl-Hirschman Index for imports was virtually unchanged (2 200 in 2015 versus 2 248 in 2025), confirming a persistent reliance on a handful of Asian suppliers (Concentration HHI). Export concentration, meanwhile, declined from 1 174 to 953, indicating that EU exporters successfully broadened their customer base.

## Deepening External Dependency Amidst Soaring Export Propensity

The EU footwear industry has become simultaneously more dependent on foreign supply and more oriented towards foreign customers.

### Net import reliance surged from 4.8 % to 29.4 % of apparent demand.

In 2015, net imports represented a modest 4.8 % of apparent EU-27 consumption; by 2024, this had climbed to 29.4 % (Net Import Reliance). The sharpest spike occurred in 2022 (40.4 %), likely driven by the post-COVID demand rebound and inventory restocking.

### Export propensity almost tripled, reaching 97.6 % in 2024.

The share of domestic production destined for non-EU markets rose from 37.6 % in 2015 to 97.6 % in 2024 (Export Propensity). This extraordinary increase reflects both the contraction of EU production (quantity fell by 56.8 % between 2003 and 2024) and the commercial success of European brands in high-value segments abroad.

### A clear intra-EU specialisation pattern persists, with Portugal, Italy, and Luxembourg showing the strongest revealed comparative advantage.

In 2025, Portugal held the highest revealed symmetric comparative advantage (RSCA = 0.40), followed by Luxembourg (0.31) and Croatia (0.29) (Specialisation). Italy, despite being the largest exporter in absolute terms, recorded an RSCA of 0.26, confirming its long-standing expertise in leather footwear.

## Conclusion

EU footwear trade over 2015–2025 has been defined by a deepening deficit, a pronounced geography shift in both sourcing and exports, and a strong qualitative divergence between the two trade flows. The bloc increasingly imports large volumes of competitively priced footwear from a concentrated set of Asian partners, while exporting far fewer but much more valuable pairs, primarily high-end leather and textile-upper shoes. The structural trends — rising import dependency, falling domestic output, and highly elevated export propensity — suggest that the EU footwear sector is evolving into a specialist, design- and brand-intensive niche within a globalised supply chain.

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