Market evolution: Headgear (CN 65) — 2015–2025

Introduction

The EU market for headgear and parts thereof (CN 65) underwent profound changes between 2015 and 2025. Overall extra-EU trade expanded rapidly, with import value climbing 81.9 % and export value surging 125.1 %, yet the trade balance remained firmly negative and the EU's net import reliance deepened substantially. The decade was marked by a stark divergence between high-priced EU exports and low-cost imports, a reshuffling of trade partners driven by geopolitical shocks and supply-chain diversification, and a growing specialisation among certain EU member states. This report dissects these dynamics in three sections, drawing exclusively on the provided data from the Trade Dashboard.

Boom-and-Dependency: The Relentless Rise of Headgear Imports

Extra-EU headgear imports almost doubled in value, driven by surging volumes and the sustained dominance of Asian suppliers

Total extra-EU imports grew from €1,329.7 million in 2015 to €2,419.2 million in 2025, while the quantity imported rose from 72 208 to 117 997 tonnes (Trade overview). China reinforced its position as the foremost supplier, delivering €1,582.5 million in 2025 against €941.2 million in 2015 (+68.1 %). However, the import landscape became more diversified as several other Asian producers recorded triple-digit growth.

Import partner	2015 (€ million)	2025 (€ million)	Change (%)
China	941.2	1,582.5	+68.1 %
Viet Nam	33.2	196.0	+489.7 %
Bangladesh	23.3	62.3	+167.7 %
United States	38.1	80.1	+110.5 %
Türkiye	7.0	61.5	+772.9 %
United Kingdom	101.6	61.3	–39.7 %
Taiwan	27.6	15.9	–42.5 %

Source: Top import partners

The combined effect was a trade deficit that widened from € 824 million to € 1 281 million over the period, with a peak of € 1 629 million in 2022.

The EU's net import reliance escalated dramatically, exposing growing vulnerability to external supply disruptions

EU net import reliance for headgear jumped from 36.8 % in 2015 to 44.7 % in 2024, having reached an all-time high of 55.4 % in 2022 (Net import reliance). This steep rise indicates that domestic production covered a shrinking share of apparent consumption, especially during the post-pandemic demand spike.

Import diversification is under way, though China remains the linchpin

The Herfindahl-Hirschman Index (HHI) for import value contracted from 5 109 to 4 451, signalling a modest de-concentration (Concentration HHI). Viet Nam, Bangladesh and Türkiye all multiplied their market shares, yet China still accounted for the bulk of shipments. In terms of volume volatility, the United Kingdom was the most erratic partner (CV = 1.05), while China (CV = 0.15) and Thailand (CV = 0.13) provided the most stable flows (Volatility bars).

Geopolitical Reorientation: Export Growth and the Shifting Partner Map

EU exports more than doubled in value, propelled by premium products while volumes barely grew

Extra-EU exports rose from €505.6 million (11 583 tonnes) to €1,138.1 million (12 642 tonnes), implying an average unit price leap from €43 637/t to €90 003/t (+106.3 %) (Trade overview). This points to a clear upmarket shift in the composition of EU headgear sales.

The United States overtook traditional nearby markets, while Russia collapsed and Türkiye surged

The United States became the top export destination in 2025, absorbing €196.8 million (+213.5 % vs 2015). Türkiye and Ukraine also posted extraordinary increases, whereas exports to the Russian Federation shrank by 35.4 % after sanctions and trade restrictions took effect.

Export partner	2015 (€ million)	2025 (€ million)	Change (%)
United States	62.8	196.8	+213.5 %
United Kingdom	125.5	153.0	+21.9 %
Switzerland	61.1	138.1	+126.2 %
Norway	23.3	59.0	+153.4 %
Ukraine	6.8	51.6	+664.8 %
Türkiye	13.6	43.6	+219.5 %
Russian Federation	35.7	23.1	–35.4 %

Source: Top export partners

Export market concentration fell, with the HHI dropping from 1 066 to 796, suggesting a healthier spread of destination risk (Concentration HHI).

Geopolitical tensions triggered sharp price shocks in exports to Ukraine and Israel

Two pronounced price shocks were detected. In 2022, the unit price of EU exports to Ukraine jumped 168.3 % (centre of the shock) amid the Russian invasion, reaching €95 854/t before retreating partially. In 2023, exports to Israel experienced an 89.0 % price surge with an abnormality score of 9.4, concentrated in a single year (Supply shocks). These events highlight the sensitivity of headgear trade to regional crises even in relatively small partner markets.

The Dual-Speed Market: Quality Specialisation versus Low-Cost Commodity Trade

A vast unit-value gap separates luxury-oriented EU exports from mass-market imports

The aggregate unit price for EU exports (€90 003/t in 2025) far exceeded that of imports (€20 499/t). This gap is even wider at the subheading level, as shown by the two largest product segments.

CN code	Description (abbreviated)	Import price 2025 (€/t)	Export price 2025 (€/t)
6505	Knitted/crocheted hats & textile headgear	15 471	103 251
6506	Other headgear (incl. safety, sports)	27 980	74 234
6504	Plaited/assembled strip hats	17 984	126 343
6507	Headbands, linings, frames, peaks, etc.	64 044	88 289

Source: Product segment breakdown

The largest import volumes are in the low-priced categories 6505 and 6506, which together represented 93 % of total import quantity in 2025. On the export side, the same two headings dominate, but their unit values are 5–6 times higher, indicating that the EU sells differentiated, high-quality products while sourcing basic, cost-competitive articles.

Production value rises even as output shrinks, and specialisation concentrates in a few Member States

EU domestic production volume fell from 55.5 million units in 2015 to 24.1 million units in 2024, yet production value increased from €445.7 million to €644.2 million over the same period (Production volumes). The unit value of domestic output thus rose substantially, mirroring the export price trajectory.

The revealed comparative advantage (RCA) in 2025 highlights a clear cluster of specialised countries (Specialisation):

Member State	RCA	RSCA	Share of EU-27 exports
Italy	1.71	0.26	13.7 %
Portugal	1.57	0.22	2.2 %
France	1.55	0.21	12.1 %
Poland	1.21	0.10	8.0 %
Spain	1.11	0.05	6.4 %

In contrast, Hungary (RCA 0.15), Ireland (RCA 0.03) and Malta (RCA 0.07) show the lowest specialisation. The EU trade intensity ratio reached 79.6 % in 2024, up from 45.7 % in 2015, and export propensity climbed from 27.2 % to 52.5 % in 2024 (Trade intensity and Export propensity). These ratios confirm that the sector has become both more outward-oriented and more integrated in global value chains.

Conclusion

EU headgear trade over the last decade reveals a sector in fast transformation. Imports have ballooned, driven by Asian suppliers and feeding a deepening import reliance that now approaches half of apparent consumption. At the same time, EU exporters have successfully repositioned toward high-value segments, doubling export revenues on a nearly flat volume base. The partner landscape has been redrawn: the United States has displaced historic destinations, Russia has faded, and emerging partners such as Türkiye and Ukraine have grown rapidly but remain volatile. The stark price gap between low-cost imports and premium exports underscores the specialisation of EU producers—clustered in Italy, Portugal and France—in quality niches. Nevertheless, the widening trade deficit and the increasing vulnerability to supply and price shocks call for a careful monitoring of the sector's strategic resilience in the years ahead.

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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.