Market evolution: Household linens (CN 6302) — 2015–2025

Introduction

The EU market for household linens (HS 6302) – bedlinen, table linen, toilet linen and kitchen linen – has undergone a profound transformation between 2015 and 2025. While extra-EU exports have remained broadly flat in value, imports have surged, leading to a ballooning trade deficit. Domestic production has shrunk markedly, and the EU's dependence on a handful of Asian suppliers has intensified. This report examines the main trade, production and concentration dynamics over the period, identifying the key shifts that are reshaping the sector.

1. Widening trade imbalance: import volumes soar, exports lose ground

EU export value stagnates while import value jumps 38 % over the decade

Despite a 2.5 % rise in extra-EU export value (from €0.80 bn to €0.82 bn), the trade picture is dominated by a 38.1 % surge in imports, which climbed from €3.14 bn in 2015 to €4.34 bn in 2025. The trade deficit consequently deepened by 50.3 %, from –€2.34 bn to –€3.52 bn.

Trade overview

Indicator (€)	2015	2025	Change
Exports	803 mn	824 mn	+2.5 %
Imports	3 143 mn	4 340 mn	+38.1 %
Trade balance	–2 340 mn	–3 516 mn	–50.3 %

Volume trends underscore a structural gap: export quantities shrink, import quantities surge

The volume data reveal an even starker divergence. Export quantities fell by 12.9 % (from 60.8 kt to 52.9 kt), while import quantities jumped by 46.2 % (from 489 kt to 715 kt). The EU is shipping fewer goods abroad while absorbing ever-larger volumes from third countries.

Unit price divergence cushions export revenue but deepens the trade deficit

Average export prices rose by 17.7 % (from €13.2/kg to €15.6/kg), softening the value-decline impact of lower volumes. In contrast, import prices edged down 5.5 % (from €6.4/kg to €6.1/kg), making foreign household linens even more competitive. This combination of falling import prices and rising export volumes-at-higher-prices magnifies the trade deficit in quantity terms.

2. Reshuffled partner tiers: Pakistan's dominance and post-Brexit realignments

Pakistan consolidates as top supplier, Türkiye and the UK lose ground

Pakistan has cemented its position as the EU's premier external supplier, with import value more than doubling (+120.8 %) to €2.11 bn in 2025. China remains the second-largest source (+31.8 % to €0.77 bn), while imports from Türkiye fell by 24.8 % and from the United Kingdom plummeted by 70.5 % following Brexit.
Top partners (imports)

Import partner	2015 (€ mn)	2025 (€ mn)	Change
Pakistan	958	2 115	+120.8 %
China	586	773	+31.8 %
Türkiye	692	520	–24.8 %
India	344	439	+27.8 %
Bangladesh	192	194	+1.0 %
United Kingdom	88	26	–70.5 %

Export destinations shift towards North America and Morocco, while UK and Switzerland decline

Extra-EU exports have undergone a re-orientation. Shipments to the United States grew by 24.5 % (to €195 mn), making it the top destination, while Switzerland saw a modest decline (–5.6 %). The United Kingdom's importance fell by 23.3 %. Remarkable growth occurred in Canada (+144.5 %), Morocco (+198.1 %) and Ukraine (+264.2 %), albeit from low bases.

Export partner	2015 (€ mn)	2025 (€ mn)	Change
Switzerland	197	186	–5.6 %
United Kingdom	139	106	–23.3 %
United States	157	195	+24.5 %
Morocco	5	16	+198.1 %
Canada	15	36	+144.5 %
Ukraine	4	15	+264.2 %

Import concentration rises sharply, driven by Asian suppliers

The Herfindahl-Hirschman Index (HHI) for imports climbed by 54.4 %, from 1 938 to 2 992, indicating a marked increase in supplier concentration. Export concentration, by contrast, barely changed (–2.1 %), reflecting a somewhat more diversified buyer base.

Market concentration

3. Fading production base and mounting external dependency

EU production volume nearly halves, deepening import reliance

EU production of household linens has shrunk dramatically. From a longer-term peak of 313 million kg in 2003, output fell to 157 million kg in 2024 (–49.8 %). Focusing on the report window, production dropped from 185 million kg in 2015 to 157 million kg in 2024 (–15 %). The production value followed a similar path, declining from €1.62 bn to €1.51 bn over the same decade.

Production volumes

This production erosion is mirrored in the EU's net import reliance, which rose from 9.3 % in 2003 to 68.1 % in 2024. In 2015 it already stood at 59.0 %, meaning more than two-thirds of EU demand is now met by imports.

Net import reliance

Intra-EU specialisation: Portugal leads exports, Germany dominates imports

Among EU member states, Portugal is by far the most specialised exporter (RSCA 0.77, RCA 7.7), accounting for a significant share of extra-EU shipments. Germany, France, the Netherlands, Italy and Spain are the main importing countries, reflecting their roles as distribution hubs and large consumer markets.

Specialisation

Price shocks and volatility test supply chain resilience

The sector experienced notable price shocks in 2022. The most severe was a 33.2 % surge in export unit values to the United States, accompanied by a 25 % price spike in imports from India, 28.3 % from Pakistan, and 27.3 % from China. These events, linked to post-COVID supply-chain disruptions and raw-material cost increases, tested the resilience of EU trade flows.

Volatility and shocks

Supply volatility, as measured by the coefficient of variation in import quantities, highlights the United Kingdom as the most erratic source (CV 0.69), largely due to the Brexit-related collapse in trade. Among export destinations, Morocco and Ukraine exhibit very high volatility (CV 0.93 and 0.46 respectively), reflecting rapid but unstable demand growth.

Volatility bars

Conclusion

The EU's household-linen market has become deeply import-dependent over the past decade. A widening trade gap, fuelled by surging volumes from Pakistan, China and other Asian economies, has coincided with a steady erosion of domestic production. Export shipments are struggling to keep pace, and the bloc's vulnerability is underscored by rising supplier concentration and significant price shocks. Looking ahead, the EU faces a twin challenge: managing supply-chain risks from a concentrated import base while possibly reassessing the competitive position of its remaining manufacturers. The data point to a sector where external dependency has become structural, with little sign of reversal in the foreseeable future.

Generated on 2026-07-28 based on data from tradedashboard.eu

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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.