Market evolution: Industrial textile fabrics (CN 59) — 2015–2025

Introduction

This report examines the evolution of European Union extra-EU trade in Chapter 59 goods – impregnated, coated, covered or laminated textile fabrics and textile articles for industrial use – from 2015 to 2025. The analysis draws exclusively on the quantitative evidence provided by the Trade Dashboard. Over the decade, the EU's position in this segment shifted from a sizeable net exporter to a substantially stronger surplus economy, driven by a sharp appreciation in export unit values while import prices stagnated or declined. At the same time, the geographical pattern of trade was reshaped by geopolitical shocks, and the internal EU production structure moved towards higher-value specialisation.

1 A trade surplus built on rising export prices, not volume

The EU's extra-EU trade balance for Chapter 59 more than doubled over the period, moving from a surplus of €0.80 billion in 2015 to €1.62 billion in 2025, an increase of 101.4 %. This was overwhelmingly a story of price competitiveness, as export volumes barely grew.

Export values soared while quantities remained almost flat

Between 2015 and 2025, extra-EU exports of CN 59 goods rose from €2.43 billion to €3.42 billion (+41.0 %), while the exported quantity moved only from 237 thousand tonnes to 240 thousand tonnes (+1.1 %). The entire value increase is therefore explained by a 39.4 % rise in the average export price, from €10 212 to €14 239 per tonne. In contrast, import values grew by just 11.1 % (from €1.62 billion to €1.80 billion), even though import volumes increased by 17.7 % (from 261 thousand tonnes to 307 thousand tonnes), because average import prices fell by 5.6 % (from €6 229 to €5 879 per tonne).

Indicator	2015	2025	Change (%)
Export value (€ bn)	2.43	3.42	+41.0
Export volume (thousand tonnes)	237.6	240.2	+1.1
Export unit price (€/tonne)	10 212	14 239	+39.4
Import value (€ bn)	1.62	1.80	+11.1
Import volume (thousand tonnes)	260.7	307.0	+17.7
Import unit price (€/tonne)	6 229	5 879	–5.6
Trade balance (€ bn)	0.80	1.62	+101.4

Source: Trade overview

The most important product segments are high-value specialities

The export price surge was channelled through the most sophisticated product sub-categories. Technical textiles (CN 5911) recorded an average export unit price of €28 794 / tonne in 2025, up from €21 385 / tonne in 2015. Plastics-coated fabrics (CN 5903), the largest export segment by volume, saw its price rise from €9 075 to €12 616 / tonne. On the import side, technical textiles also commanded high prices, but they declined from €20 184 to €17 934 / tonne. Thus the EU's trade surplus owes much to a favourable price gap in high-tech industrial fabrics.

Source: Product segment comparison

Import competition intensified on price, not on value

While EU export unit values appreciated, import prices declined, especially from major Asian suppliers. China's import price fell from €6 232 / tonne in 2015 to €5 879 / tonne in 2025 (-5.6 %), while Vietnam's import price was even more volatile. The EU's ability to raise its own export prices without losing market share points to strong demand for its quality-driven products, even as cheaper imports entered the market.

Source: Volatility overview

2 Geopolitical realignments redraw the trade map

Extra-EU trade in CN 59 has been reshaped by sanctions, supply-chain shifts and regionalisation. Export destinations diversified, while import sources became more concentrated and less reliant on traditional Western partners.

Russia’s collapse as an export market is the single biggest disruption

EU exports to the Russian Federation fell from €132.2 million in 2015 to just €24.3 million in 2025, a drop of 81.6 %. The coefficient of variation for exports to Russia was 0.496, the highest among all major partners. The emergency was most pronounced after 2022, when the value collapsed from €96.9 million (2022) to €24.3 million (2025). This loss was compensated by strong growth in other markets.

Export partner	2015 (€ mn)	2025 (€ mn)	Change (%)
United States	320.4	480.6	+50.0
United Kingdom	255.8	249.9	–2.3
Türkiye	143.4	239.7	+67.1
China	242.2	270.8	+11.8
Morocco	95.1	237.0	+149.2
Russia	132.2	24.3	–81.6

Source: Top export partners

Imports became more dependent on China and Southeast Asia

On the import side, China strengthened its position as the top supplier, with deliveries rising from €457 million to €717 million (+56.8 %). Vietnam grew explosively, from €36.2 million to €115.0 million (+217.3 %). Meanwhile, imports from the United Kingdom fell by 37.2 % (from €346.6 million to €217.6 million) and from the Republic of Korea by 32.1 % (from €145.5 million to €98.8 million). The Herfindahl-Hirschman Index for extra-EU imports increased from 1 580 in 2015 to 1 965 in 2025 (+24.4 %), indicating a less diversified, more China-centric import structure.

Import partner	2015 (€ mn)	2025 (€ mn)	Change (%)
China	457.0	716.5	+56.8
Türkiye	133.9	133.7	–0.2
United Kingdom	346.6	217.6	–37.2
Korea, Rep.	145.5	98.8	–32.1
Viet Nam	36.2	115.0	+217.3
United States	144.5	124.9	–13.6
India	23.9	35.6	+49.1

Source: Top import partners and import concentration

Nearby and Mediterranean partners gained export share

The EU redirected part of its exports towards neighbouring or emerging industrial hubs. Exports to Morocco jumped by 149.2 %, to Tunisia by 203 % (from €66.3 million to €200.9 million) and to Serbia by 156 % (in value). Even traditionally smaller markets such as North Macedonia and Ukraine (the latter before the war) saw solid increases. These flows were partly linked to the re-routing of textile production chains away from Eastern Europe and towards the southern Mediterranean.

Source: Volatility data and export shares

3 EU internal specialisation deepens, reinforcing export strength

Behind the aggregate trade surplus, a clear pattern of production specialisation and a strong export propensity emerged within the EU single market. The bloc's net-import reliance became more negative, revealing a sector that increasingly serves global demand from a domestic industrial base.

Net-import reliance reached a record negative level

The EU's net import reliance ratio for CN 59 fell from –15.6 % in 2015 to –34.9 % in 2024, meaning the EU is a net exporter of these goods to the rest of the world and the export surplus is growing relative to domestic consumption. This metric reached its most negative value in 2024, consistent with the rising trade balance and a production value that stood at €5.35 billion in 2024 (up 8.6 % from 2015), despite a decline in production volume.

Year	Net import reliance (%)	Export propensity (%)	Trade intensity (%)
2015	–15.6	41.6	41.3
2024	–34.9	57.4	67.6

Source: Net import reliance, export propensity, trade intensity

Germany and Italy remain the industrial core, but Poland is the rising star

Germany alone accounted for 34.5 % of extra-EU exports in 2025 (€1 182 million), while Italy contributed 15.2 % (€519 million). Their export specialisation indices (RSCA) are positive and high. The most spectacular growth among major reporters, however, came from Poland, whose exports rose from €76 million to €192 million (+152.6 %), propelling it into the group of top exporters. On the import side, Germany, the Netherlands and Italy remain the largest importing Member States, though German imports fell by 16.2 % over the period, reflecting perhaps a stronger role as a re-exporter.

Leading EU exporter	2015 (€ mn)	2025 (€ mn)	Change (%)
Germany	889.2	1 182.1	+32.9
Italy	405.9	519.2	+27.9
France	160.3	188.8	+17.8
Belgium	145.4	183.5	+26.2
Netherlands	155.2	180.8	+16.5
Spain	145.4	174.0	+19.7
Poland	76.0	191.8	+152.6

Source: Top reporting Member States

Specialisation is concentrated in a handful of highly capable countries

In 2025, the most specialised EU countries in CN 59 were Luxembourg (RSCA 0.83), Portugal (0.47) and Italy (0.21), all with strong revealed comparative advantage in extra-EU exports. Germany’s RSCA of 0.14 underlines its role as a large but not hyper-specialised supplier; its sheer scale drives the aggregate surplus. At the opposite end, Malta, Cyprus and Ireland show virtually no specialisation in these industrial fabrics. The EU’s export performance thus rests on a cluster of highly competent industrial producers, with Germany and Italy acting as the backbone and Poland rapidly climbing the value chain.

Source: Specialisation map

Conclusion

Over the decade to 2025, the European Union transformed its trade in industrial textile fabrics from a solid surplus into a much larger one, powered not by selling more tonnes but by commanding higher unit prices in global markets. This favourable price dynamic was reinforced by a shift in export destinations away from Russia and towards the United States, North Africa and the Near East, while imports became more concentrated on China and Vietnam. EU production specialisation deepened, with export propensity rising from 41 % to 57 % and net-import reliance turning sharply negative. The sector increasingly behaves as a high-value, export-oriented industrial pillar within the single market, though its growing dependence on a limited set of Asian suppliers and the remaining volatility in certain partner markets warrant close monitoring.

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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.