Market evolution: Knit tops (CN 6109) — 2015–2025

Introduction

Customs code 6109 covers T-shirts, singlets and other vests of knitted or crocheted fabric, subdivided into cotton (610910) and other textile materials (610990). This report analyses the European Union’s extra-EU trade from 2015 to 2025, using annual figures. Over the decade the EU remained a large net importer, but the pattern of trade shifted markedly in terms of volumes, prices, partners and the balance between the two material segments. Three main dynamics stand out: a persistently widening trade deficit masked by sharply rising export unit values; a substantial reorganisation of both import sources and export destinations; and the dominance of cotton items combined with a series of disruptive price shocks.

1. A deepening trade deficit cushioned by soaring export unit values

Import volumes surged while export quantities contracted

EU imports of knit tops grew from 506.7 thousand tonnes in 2015 to 618.4 thousand tonnes in 2025, an increase of 22.0 %. In contrast, exports fell from 59.5 thousand tonnes to 55.4 thousand tonnes (–6.9 %). The resulting deficit in tonnes widened considerably, as shown in the overview of trade flows.

Year	Imports (tonnes)	Exports (tonnes)
2015	506,706.8	59,479.5
2025	618,392.0	55,395.6
Change	+22.0 %	–6.9 %

EU export prices skyrocketed, widening the quality gap

In value terms the trade deficit also worsened, from –€5.75 billion to –€6.31 billion (–9.8 %). However, the value of exports jumped by 41.4 % (from €2.20 billion to €3.12 billion) while imports rose more modestly by 18.5 % (from €7.96 billion to €9.43 billion). The explanation lies entirely in unit prices: the average export price climbed from €37,039 per tonne to €56,250 per tonne (+51.9 %), whereas the import price barely changed, moving from €15,702 to €15,249 per tonne (–2.9 %). The EU is therefore shipping ever higher-value knitwear while importing low-cost volume. Further details can be found under General Overview trade.

Flow	Value 2015 (million €)	Value 2025 (million €)	Change	Unit price 2015 (€/t)	Unit price 2025 (€/t)	Change
Imports	7,956.2	9,430.5	+18.5 %	15,701.6	15,249.4	–2.9 %
Exports	2,203.1	3,116.2	+41.4 %	37,039.3	56,250.5	+51.9 %

2. A changing geography: Bangladesh's dominance and the re-orientation of EU exports

Bangladesh solidifies its position, while Türkiye and the UK fade

The import side has become more concentrated. The Herfindahl-Hirschman Index (HHI) for import value rose from 1,824 to 2,159 (+18.4 %), as illustrated in the concentration dashboard. Bangladesh, already the largest supplier, increased its EU sales from €2,602.6 million to €3,896.9 million (+49.7 %). Meanwhile, Türkiye (–23.9 %), China (–2.0 %) and Cambodia (–25.7 %) all lost ground. The most dramatic change was the collapse of imports from the United Kingdom, which fell from €401.3 million to €101.8 million (–74.6 %) following Brexit. The full ranking is given under top trading partners.

Import partner	2015 (million €)	2025 (million €)	Change
Bangladesh	2,602.6	3,896.9	+49.7 %
Türkiye	1,631.4	1,241.5	–23.9 %
China	1,134.7	1,111.7	–2.0 %
India	701.7	747.6	+6.5 %
United Kingdom	401.3	101.8	–74.6 %
Morocco	173.3	201.2	+16.1 %
Cambodia	252.3	187.4	–25.7 %

EU exports pivot from the UK to Switzerland, the US, Türkiye and China

Export destinations became significantly more diversified: the HHI for export value dropped from 1,259 to 776 (–38.4 %) (concentration). The United Kingdom, the top market in 2015, shrank by 36.3 %, while Switzerland, the new number one, grew by 85.4 %. Striking increases were also recorded for China (+236.7 %) and Türkiye (+163.5 %), as well as the United States (+90.0 %) and Albania (+75.0 %). The data comes from the partner overview.

Export partner	2015 (million €)	2025 (million €)	Change
United Kingdom	669.4	426.1	–36.3 %
Switzerland	289.2	536.4	+85.4 %
Russian Federation	126.5	118.4	–6.4 %
United States	117.3	223.0	+90.0 %
Türkiye	58.6	154.4	+163.5 %
Albania	16.8	29.4	+75.0 %
China	91.4	307.7	+236.7 %

Member-state dynamics: Poland and the Netherlands emerge as import hubs, Italy as export champion

Within the EU, import activity shifted towards the Netherlands (+34.6 %), Spain (+46.6 %) and especially Poland, whose imports surged from €146.2 million to €602.6 million (+312.2 %). Germany remained the largest importer but saw a decline of 9.3 %. Belgium's intake fell by 23.6 %. On the export side, Italy consolidated its leadership, growing from €475.5 million to €877.1 million (+84.5 %). France (+118.5 %), Germany (+28.3 %) and the Netherlands (+44.5 %) also advanced, while Spain (–41.1 %) and Belgium (–48.6 %) retreated sharply. The figures are available from top EU reporters.

Member State (imports)	2015 (million €)	2025 (million €)	Change
Germany	2,405.4	2,181.6	–9.3 %
Netherlands	1,063.7	1,432.0	+34.6 %
Spain	888.1	1,302.3	+46.6 %
Poland	146.2	602.6	+312.2 %

Member State (exports)	2015 (million €)	2025 (million €)	Change
Italy	475.5	877.1	+84.5 %
Germany	422.5	542.0	+28.3 %
Spain	453.2	266.8	–41.1 %
France	213.1	465.6	+118.5 %

3. Cotton's reign and the price shocks that reshaped the market

Cotton knit tops dominate import volumes and export value growth

The product heading 6109 splits into cotton garments (610910) and those made of other fibres (610990). On the import side, cotton items accounted for 479.6 thousand tonnes in 2025, up from 388.0 thousand tonnes in 2015 (+23.6 %), while other-fibre items rose from 118.7 thousand tonnes to 138.8 thousand tonnes (+17.0 %). Consequently, cotton now represents 78 % of imported volume. Export-wise, cotton volumes increased by 19.9 % (from 37.9 kt to 45.4 kt) while other-fibre exports collapsed by 53.8 % (from 21.6 kt to 10.0 kt). The value performance was even more polarised: cotton export values jumped by 85.5 % to €2.49 billion, driven by a unit-price surge from €35,438/t to €54,804/t. The segment breakdown is detailed on the product compare page.

Segment	Flow	2015 quantity (tonnes)	2025 quantity (tonnes)	Change	2015 price (€/t)	2025 price (€/t)	Change
610910 (cotton)	Imports	388,025.4	479,586.9	+23.6 %	13,607.7	14,251.5	+4.7 %
610990 (other)	Imports	118,681.4	138,805.1	+17.0 %	22,546.7	18,693.5	–17.1 %
610910 (cotton)	Exports	37,873.0	45,435.4	+19.9 %	35,437.7	54,804.2	+54.6 %
610990 (other)	Exports	21,606.6	9,981.8	–53.8 %	39,842.8	65,846.9	+65.3 %

Brexit, sanctions and post-COVID bounce-back triggered extreme price swings

Volatility analysis from the volatility dashboard shows that the United Kingdom had the highest import-quantity coefficient of variation (0.75), reflecting the Brexit-related shock. The shock detection pinpointed several events:

- **Imports from Bangladesh** suffered a severe price shock in 2022 (+27.1 %) as unit values jumped to €14,107/t before partially retreating.
- **Imports from the United Kingdom** experienced a 189.5 % price spike in 2021 when quantities plunged to 2.8 kt and the unit price reached €42,579/t.
- **Exports to Russia** saw a 40.9 % price shock in 2022, with volumes halving to 2.8 kt and prices rising to €41,047/t, mirroring trade restrictions.
- **Exports to Mexico** recorded a 128.3 % price increase in 2023, with volume dropping to 1.0 kt and unit values reaching €38,671/t.

These shocks, combined with diverging price trends, illustrate how external events (pandemic recovery, trade policy changes) quickly altered cost structures and commercial flows.

Conclusion

Over the 2015–2025 period, the EU's trade in knitted tops deepened its structural deficit, as import volumes continued to expand while export tonnage shrank. The deficit was partly offset by a remarkable upscaling of EU export unit values, underscoring a pronounced quality segmentation: low-cost volume imports mainly from Asia, high-value exports destined for wealthy and emerging markets. The import side became more concentrated around Bangladesh, whereas the export map diversified away from the UK towards Switzerland, the United States, China and Türkiye. Internally, Poland and the Netherlands evolved into major import hubs, while Italy cemented its role as the leading EU exporter. The cotton sub-heading drove the bulk of trade, and a series of price shocks—most notably the post-Brexit UK disruption, the 2022 Bangladesh price surge, and the impact of sanctions on Russia—left clear marks on bilateral flows. Looking ahead, the key uncertainties remain the EU's ability to sustain its high-value export positioning and the potential for further diversification of supply chains away from a few dominant suppliers.

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