EU TRADE EXPLORER

Market evolution: Knitted clothing (CN 61) — 2015–2025

Introduction

The European Union's external trade in articles of apparel and clothing accessories, knitted or crocheted (CN 61) is marked by a large and growing structural deficit. Between 2015 and 2025, the value of imports climbed from EUR 35.0 billion to EUR 48.3 billion, while exports rose from EUR 10.4 billion to EUR 14.8 billion. Yet behind the parallel growth lie two very different dynamics: import volumes surged by 46.7 %, while export volumes actually shrank by 2.9 %. The consequence is a permanently negative trade balance that widened from –EUR 24.6 billion to –EUR 33.5 billion. This report disentangles the three main trends that shaped the decade: the value-volume paradox, the profound geographic reorientation of sourcing and sales, and the growing specialisation of certain EU member states. All underlying data can be explored on the Trade overview dashboard.

A widening trade deficit driven by surging low-cost imports and an "up-pricing" of exports

Import volumes expand far faster than values, compressing average import prices.

Over the decade, the EU's extra-EU imports of knitted clothing jumped from 2.09 million tonnes to 3.06 million tonnes (+46.7 %), while import value rose only 38.0 % to EUR 48.3 billion. As a result, the average import price fell from EUR 16 747/tonne to EUR 15 755/tonne (–5.9 %). This signals a continuous shift towards lower-cost suppliers and an overall cheapening of the import mix.

Exports become more expensive while export tonnage stagnates.

Exports tell the opposite story. Export value grew by 42.4 %, reaching EUR 14.8 billion, but the weight of shipped goods declined by 2.9 %, from 258 600 tonnes to 251 200 tonnes. Consequently, the average export price soared by 46.6 %, from EUR 40 102/tonne to EUR 58 797/tonne. The EU is therefore exporting fewer, but far more valuable, knitted garments – a clear up-market repositioning.

The deficit deepens, reflecting a persistent structural imbalance.

The trade balance in this chapter remained solidly negative, moving from –EUR 24.6 billion to –EUR 33.5 billion, a deterioration of 36.2 %. The imbalance stems from a combination of booming low-cost imports and a relatively small, premium export basket that cannot close the gap.

Indicator (EUR)	2015	2025	Change
Imports (bn)	34.98	48.28	+38.0 %
Exports (bn)	10.37	14.77	+42.4 %
Trade balance (bn)	–24.61	–33.51	–36.2 %
Import price (EUR/t)	16 746	15 755	–5.9 %
Export price (EUR/t)	40 102	58 797	+46.6 %

Data: Trade overview.

Asian suppliers consolidate their grip while Brexit and sanctions redraw the export map

Bangladesh and China together supply over half of EU knitwear imports; Pakistan and Cambodia post the fastest growth.

The EU's import sourcing remains highly concentrated, though the composition inside the top group is changing. In 2025, China was the largest origin (EUR 15.07 billion), closely followed by Bangladesh (EUR 11.74 billion). However, Bangladesh's value grew by 69.5 % over the period, and its share reached 29.6 % in 2022 during a price-shock year. Meanwhile, Pakistan expanded by 187.2 % (to EUR 1.91 billion) and Cambodia by 65.7 % (to EUR 2.69 billion). India and Türkiye also grew, though more moderately (+19.5 % and +6.2 %, respectively). The import HHI, at 1 802 in 2025, barely moved from 2015, confirming that supply remains concentrated among a handful of Asian economies. (See Top trading partners and Concentration and HHI.)

The United Kingdom's import role collapses after its departure from the single market.

Before Brexit, the UK was a significant intra-EU re-export hub, reflected in EUR 2.26 billion of extra-EU imports in 2019. Once it left the EU legal framework, its classification changed, and by 2025 the UK accounted for only EUR 0.66 billion (–64.6 %). The drop is one of the most visible trade-policy effects in the data.

EU exports diversify away from the UK and Russia, while Switzerland, the US and Türkiye become critical outlets.

On the export side, the United Kingdom remained the top destination (EUR 2.12 billion in 2025), but its weight fell by 30.9 %. Exports to the Russian Federation shrank by 24.9 %, notably after the 2022 sanctions. In contrast, Swiss demand jumped 90.3 % (to EUR 2.51 billion), US exports nearly doubled (+96.1 % to EUR 1.47 billion), and Türkiye emerged as a fast-growing market (+191.3 % to EUR 0.82 billion). The export HHI dropped from 1 244 to 795 (–36.1 %), a clear sign that EU exporters successfully broadened their destination portfolio.

Partner (imports)	2015 (bn EUR)	2025 (bn EUR)	Change	Partner (exports)	2015 (bn EUR)	2025 (bn EUR)	Change
China	11.67	15.07	+29.2%	United Kingdom	3.07	2.12	–30.9%
Bangladesh	6.93	11.74	+69.5%	Switzerland	1.32	2.51	+90.3%
Cambodia	1.62	2.69	+65.7%	United States	0.75	1.47	+96.1%
Pakistan	0.67	1.91	+187.2%	Türkiye	0.28	0.82	+191.3%
United Kingdom	1.86	0.66	–64.6%	Russian Federation	0.76	0.57	–24.9%

Data: Top trading partners.

Internal rebalancing: Eastern hubs surge and southern Europe keeps its specialisation

Germany remains the largest import market, but Spain and Poland grow at exceptional speed.

Germany remained the single biggest importer among EU member states, taking in EUR 10.98 billion in 2025 (+15.0 %). Spain more than doubled its intake, reaching EUR 7.87 billion (+99.9 %). Poland recorded the most spectacular jump, from EUR 0.69 billion to EUR 2.89 billion (+315.5 %), reflecting its role as an emerging logistics and re-export hub. The Netherlands and Italy also posted robust growth (+47.0 % and +24.1 %, respectively), while Belgium's imports contracted (–24.7 %). These shifts are visible on the Top EU reporters dashboard.

Italy, Germany and a surging Poland lead the export push.

Italy, the EU's largest knitwear exporter outside the bloc, increased its shipments by 48.7 % to EUR 4.53 billion. Germany followed with EUR 2.62 billion (+50.9 %). Poland's export value expanded by 445.8 % (to EUR 0.86 billion), underlining that the country is not only an import gateway but also a rapidly growing source of EU-origin garments. France and Spain maintained large export bases, while Belgium saw a contraction (–39.0 %).

Croatia, Portugal, Denmark and Spain are the most knitwear-specialised member states.

In 2025, the highest revealed comparative advantage (RSCA) scores belong to Croatia (0.438), Portugal (0.387), Denmark (0.382), Spain (0.245) and Poland (0.234). These countries have a disproportionately large share of their extra-EU exports in knitted clothing, indicating a lasting industrial specialisation. At the other end, Ireland, Malta, Finland and Luxembourg are the least specialised. This pattern, visible on the Specialisation map, points to a dual structure: southern and eastern EU members keep a competitive edge in production, while several northern economies have shifted away from it.

A notable price shock in 2022 hit the main Asian suppliers, briefly lifting import prices.

The Volatility analysis reveals that China, Bangladesh, Türkiye and India display relatively low supply volatility, while Pakistan and the UK stand out with much higher variability. A supply-side price shock was detected in 2022: import prices from Bangladesh jumped 27.0 %, from India 18.9 %, and from Pakistan 17.4 %, coinciding with global logistics strains and raw material cost increases. On the export side, several destinations (Japan, Mexico, United Arab Emirates) experienced sharp price increases in 2023, partly linked to a compositional shift toward higher-value goods.

Conclusion

EU trade in knitted clothing over 2015-2025 is a story of two opposing trends. On the import side, the bloc deepened its reliance on a handful of Asian suppliers – especially Bangladesh, China, Cambodia and Pakistan – absorbing ever larger volumes at low or falling average prices. The trade deficit widened as a result, reaching EUR 33.5 billion in 2025. On the export side, the EU moved decisively towards higher unit-value garments, with average export prices rising by nearly half while shipped tonnage stayed essentially flat. Geopolitical and policy shocks left clear marks: Brexit caused the UK's import role to vanish and weakened the UK as an export destination, sanctions on Russia redirected some flows, and a 2022 price spike briefly lifted import costs. Inside the EU, Poland emerged as a dynamic trade hub, while Portugal, Spain, Croatia and Denmark maintained a strong knitwear specialisation. The net result is an EU that remains overwhelmingly import-dependent for everyday knitted apparel, but manages to defend a high-quality, export-oriented niche that fetches increasingly attractive prices on world markets.

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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.