EU TRADE EXPLORER

Market evolution: Knitted fabric (CN 60) — 2015–2025

Introduction

This report analyses the extra-EU trade of knitted or crocheted fabrics (Harmonised System heading 60) from 2015 to 2025. The product group covers six sub-headings – from pile fabrics (6001) to wide fabrics with elastomeric yarn (6004) and warp knits (6005) – and the data describe only transactions between EU member states and non-EU partners. Over the observed decade the knitted fabric market experienced a dramatic peak in 2022, a permanent shift in import dependence, and a profound reordering of both supply sources and export destinations. All figures are derived directly from the Trade Dashboard.

1. From external surplus to structural import reliance

The EU’s trade balance moved from a wafer-thin surplus to a persistent, volume-driven deficit in net import reliance

The nominal trade balance in euros improved from a €29 million surplus in 2015 to a €47 million surplus in 2025 (+62 %). However, this hides a more fundamental shift: the EU became a net importer in terms of import reliance. The *net import reliance* indicator swung from –2.6 % (net exporter) in 2015 to +21.2 % by 2024, meaning that more than one-fifth of the EU’s apparent consumption of knitted fabric is now supplied by non-EU producers (Net import reliance).

The 2022 spike was followed by a correction, but import volumes remained structurally high

The market reached its zenith in 2022, with exports touching €1 894 million and imports hitting €1 982 million. After that year both flows contracted, but the import volume held up much better than export volume.

Table 1: Extra-EU trade in knitted fabric (CN 60), selected years

Year	Exports (€ m)	Imports (€ m)	Export quantity (t)	Import quantity (t)
2015	1 517.5	1 488.3	131 902	280 074
2022	1 894.2	1 982.1	163 106	321 502
2025	1 464.9	1 417.6	122 474	283 723
Change 2015-2025	–3.5 %	–4.8 %	–7.1 %	+1.3 %

Source: Trade overview.

While export tonnage shrank by 7 %, import tonnage grew by 1.3 %, widening the physical trade gap. The average price of EU exports rose to €11 959/tonne (+4 %), whereas import prices fell to €4 996/tonne (–6 %), highlighting a growing quality/price differentiation between the woven and knitted fabrics that the EU sells abroad and the often more basic fabrics it buys.

Domestic production contracted dramatically, leaving the EU market far more trade-intensive

EU production of knitted fabric collapsed. The volume of output fell from an estimated 109.6 million kg in 2006 to 42.4 million kg in 2024 (–61 %), and the production value dropped from €770 million to €332 million (–57 %) (Production volumes). Consequently, trade intensity (total trade relative to output) jumped from 26.9 % in 2015 to 61.2 % in 2024, while export propensity rose from 16.6 % to 36.6 % (Trade intensity). The sector is now deeply embedded in global supply chains, with imports accounting for a large and growing share of domestic consumption.

2. A re-ordered map of trading partners

China overtook Türkiye as the leading extra-EU supplier, while South Korea’s presence collapsed

The import side of the market has become more concentrated around two dominant players. China’s shipments rose by 31 % to €629 million, whereas Türkiye’s fell by 25 % to €438 million. In 2015 Türkiye was the larger partner; by 2025 the positions had reversed. South Korean deliveries shrank by 66 % and the United Kingdom’s (post-Brexit) by 28 %.

Table 2: Top EU import suppliers, 2015 vs. 2025 (value in € million)

Partner	2015 value	2025 value	Change (%)
China	480.1	629.1	+31.0
Türkiye	586.5	437.6	–25.4
Korea, Rep.	144.2	49.2	–65.9
United Kingdom	95.5	68.8	–28.0
Egypt	14.9	10.7	–27.9
Viet Nam	12.0	11.9	–1.0
Indonesia	8.1	7.2	–11.4

Source: Top partners by value.

EU exports pivoted towards Mediterranean and Eastern European destinations, while the UK market faded

Morocco and Tunisia remained the two largest export markets, with Morocco's purchases up 19 % to €266 million and Tunisia's up 4 % to €224 million. Shipments to Ukraine surged by 32 % to €62 million, reflecting the EU's support for the country's garment industry. In contrast, exports to the United Kingdom plunged by 42 % to €65 million, a direct consequence of Brexit-related trade barriers.

Table 3: Top EU export destinations, 2015 vs. 2025 (value in € million)

Partner	2015 value	2025 value	Change (%)
Morocco	223.0	265.8	+19.2
Tunisia	214.8	223.9	+4.2
United States	113.5	110.3	–2.8
Türkiye	63.0	67.6	+7.3
United Kingdom	112.1	64.9	–42.2
Ukraine	47.1	62.0	+31.5
North Macedonia	49.9	39.7	–20.5

Source: Top partners by value.

Concentration rose modestly on both the import and export sides

The Herfindahl-Hirschman Index (HHI) for imports edged up from 2 769 to 2 983 (+7.7 %), confirming the growing dominance of China and Türkiye. Export-side HHI increased from 681 to 785 (+15.3 %), indicating that a handful of destinations (Morocco, Tunisia, the US and Ukraine) now account for a larger share of foreign sales (Concentration HHI). While the import market has long been concentrated, the export market is also becoming slightly more dependent on a few key partners.

3. Price shocks and volatility in a shrinking domestic industry

The war in Ukraine and post-pandemic disruptions triggered abrupt price shocks on key trade lanes

The price-shock detection algorithm flags several significant events, all on the export side. The most extreme was a 17.8 % price jump on exports to Ukraine in 2022, when values rose despite a drop in volume. Exports to the Russian Federation recorded a 55.9 % price surge in 2023 as quantities plummeted. Even the large, stable Moroccan market experienced a 16 % price increase in 2022 (Supply shocks). On the import side, Türkiye displayed a one-off price spike of 29.6 % in 2022 while volumes contracted, suggesting short-term supply constraints or strategic repricing.

Volatility was highest for smaller and emerging trade partners, while core relationships proved more stable

The coefficient of variation (CV) of annual import quantities shows that the most volatile suppliers were Uzbekistan (0.89), North Macedonia (0.38) and South Korea (0.35). Among export destinations, Türkiye stood out with a CV of 0.55, reflecting large swings in EU shipments. The more established partners – China (import CV 0.13), Morocco (export CV 0.14) and Tunisia (0.12) – exhibited considerably less year-to-year fluctuation (Volatility bars).

Despite the shock-prone environment, EU exporters managed to raise unit values in high-value segments

At the sub-heading level, exports are dominated by wide fabrics without elastomeric yarn (6006) and warp knits (6005). Export prices for the value-added elastomeric fabric (6004) rose to €21 682/tonne in 2025, more than four times the import price of the same category (€5 174/tonne). This differential illustrates that while the EU has become import-dependent in basic knitted fabrics, it remains competitive in specialised, higher-margin products. Nevertheless, the overall export tonnage in most sub-segments has declined, so the gains in unit value have only partially offset the volume losses.

Conclusion

The EU’s extra-EU trade in knitted fabrics has undergone a profound structural transformation between 2015 and 2025. Domestic production has halved, pushing the net import reliance ratio from a near-zero position to over 20 %. While the trade balance still shows a small euro surplus, the physical trade gap has widened in favour of imports. China has overtaken Türkiye as the foremost supplier, while EU exports have reoriented towards Mediterranean and Eastern European neighbours and away from the post-Brexit UK market. Supply-side price shocks, linked to the war in Ukraine and the pandemic aftermath, injected further volatility, but the EU has managed to maintain strong unit values in high-end product segments. The sector is now far more trade-exposed and import-reliant than at the start of the period, a reality that policymakers and industry stakeholders will need to monitor closely.

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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.