Market evolution: Leather footwear (CN 6403) — 2015–2025

Introduction

The EU's trade in leather footwear (CN 6403) underwent a structural transformation between 2015 and 2025. While the total value of exports rose strongly and imports stagnated, the physical volumes moved in opposite directions, revealing a decisive shift toward higher-priced goods. The bloc moved from a modest net importer to a sizeable net exporter, despite a shrinking domestic production base. Meanwhile, trade partnerships were reshaped by the UK's exit from the single market, the war in Ukraine, and the growing weight of Asian and North American markets. This report describes and interprets those dynamics using only the data provided, with links to the source dashboards.

1. From net importer to growing trade surplus – value up, volumes squeezed

The export value rose by almost one-fifth, entirely driven by soaring unit prices

EU extra-EU exports of CN 6403 grew from €7.48 billion in 2015 to €8.90 billion in 2025, an increase of 19.0 % in current euro terms. Over the same period the exported quantity fell by 17.5 % (from 120 340 tonnes to 99 316 tonnes). The average export price therefore jumped by 44.2 %, from roughly €62 200 / tonne to €89 700 / tonne. This premiumisation is the sole driver of the rise in export turnover. EU trade overview

Import values were broadly flat, while purchase prices edged down

Import value edged from €7.24 billion to €7.32 billion (+1.1 %), while the imported quantity rose by 5.1 % (357 178 t → 375 540 t). Consequently, the average import price fell by 3.9 % (from €20 267 / t to €19 486 / t). The EU absorbed more pairs from low-cost suppliers at stable or slightly lower unit values.

The trade balance swung strongly into surplus

Thanks to the diverging price trends, the trade balance moved from +€0.24 billion in 2015 to +€1.59 billion in 2025, a jump of 551 %. The net-import reliance indicator (negative = net exporter) fell from –15.0 % to –23.2 % over the 2015-2024 period, confirming the EU's growing self-sufficiency in this category. Net import reliance

Indicator (extra-EU)	2015	2025	Change
Export value (€bn)	7.48	8.90	+19.0 %
Export quantity (t)	120 340	99 316	–17.5 %
Export average price (€ / t)	62 178	89 655	+44.2 %
Import value (€bn)	7.24	7.32	+1.1 %
Import quantity (t)	357 178	375 540	+5.1 %
Import average price (€ / t)	20 267	19 486	–3.9 %
Trade balance (€bn)	+0.24	+1.59	+551.3 %

2. Trade partners and geographic concentration – Asia's rise, neighbours' fall

Export destinations: the US and Asian markets gain, while the UK and Russia lose ground

The most striking export shift is the rise of the United States (+53.2 % to €2.10 billion) and China (+177.1 % to €0.89 billion), as well as Türkiye (+117.3 % to €0.36 billion). In contrast, exports to the United Kingdom fell by 35.3 % (€1.60 bn → €1.04 bn) and those to the Russian Federation dropped by 52.6 % (€0.56 bn → €0.27 bn), clearly reflecting Brexit and sanctions. Switzerland remained the third largest market with a modest 10.0 % increase. Top export partners

Import sources: Vietnam overtakes nearly everyone, the UK disappears

On the import side, Vietnam surged by 61.3 % to €1.90 billion, becoming the top supplier ahead of China, which grew only 4.3 % to €1.79 billion. India, Indonesia and Bangladesh recorded moderate declines. The United Kingdom – previously a major source with €0.72 billion – collapsed by 69.7 % to €0.22 billion, a direct consequence of Brexit-related trade barriers. Top import partners

Market concentration: imports become more focused, exports more diversified

The Herfindahl-Hirschman index (HHI) for imports rose by 24.0 % (from 1 225 to 1 520), reflecting the dominant role of China and Vietnam. In contrast, the export HHI fell by 6.7 % (from 1 154 to 1 078), indicating that EU exports spread more evenly across a larger set of destinations, notably in Asia and the Middle East. Concentration HHI

3. Shocks, specialisation and the product-mix shift toward casual leather footwear

Brexit and the Ukraine war caused the most abrupt trade dislocations

The United Kingdom's exit from the EU triggered a massive supply and price shock. In 2021 the quantity imported from the UK plummeted by 93.3 % while the import price more than doubled (+161.3 %), an abnormality score of 133.7. As the new customs border bedded in, import volumes partially recovered by 2025, but the UK's role as a hub was permanently reduced.

On the export side, the Russian price shock in 2022 saw a price decline of 11.4 % (abnormality 6.3) as EU exporters adjusted to sanctions. A milder price shock was also detected for Vietnamese imports in 2022 (+13.3 %, abnormality 4.9), linked to the post-COVID demand surge and logistics disruptions. Supply and price shocks

EU production shrank, but specialisation remains deeply rooted in a few member states

Between 2015 and 2024, EU production of leather footwear fell from 361 million pairs to 230 million pairs (– 36 %), and the production value declined by 15.3 % in current prices. Nevertheless, revealed comparative advantage (RSCA) scores for 2025 show that Portugal (RSCA 0.63), Croatia (0.44) and Italy (0.39) are the most specialised exporters. Germany, France and the Netherlands, while sizeable in absolute terms, record export values that are broadly in line with their overall export basket. Production volumes
Specialisation map

The product mix moved overwhelmingly toward casual styles with rubber or plastic outsoles

The sub-heading 640399 ("Footwear with outer soles of rubber, plastics or composition leather … excluding covering the ankle")
