Market evolution: Man-made staple fibres (CN 55) — 2015–2025

Introduction

This report examines the evolution of European Union trade in man-made staple fibres (CN 55) with non-EU partners between 2015 and 2025. Drawing exclusively on the statistics and dashboards provided, it traces a decade in which the EU's position shifted from a slight surplus to a significant deficit, export volumes contracted while import volumes rose, and unit values diverged markedly. The analysis is structured around three principal findings: the reversal of the trade balance, the growing gap between import and export prices, and the reshaping of trade partnerships under the influence of geopolitical and pandemic shocks.

1. From small surplus to structural deficit: the EU becomes a net importer of staple fibres

This section documents the overall trade flows and shows how the Union's former self-sufficiency has given way to growing import dependence.

The trade balance swung from a €0.1 billion surplus to a €0.25 billion deficit

In 2015, extra-EU exports of man-made staple fibres stood at €3.04 billion and imports at €2.93 billion, leaving a modest surplus of €110 million. By 2025, exports had slipped to €2.87 billion (–5.6 %) while imports climbed to €3.12 billion (+6.5 %), yielding a deficit of €249 million. The annual trade balance thus deteriorated by 327 %.

Export volumes contracted sharply while import volumes expanded steadily

Behind the value movements lie starkly different volume trends. Exported quantities fell from 836.7 thousand tonnes to 588.9 thousand tonnes, a drop of 29.6 %. Over the same period, imported quantities rose from 1.15 million tonnes to 1.35 million tonnes (+17.1 %). These opposing trajectories signal a deep change in the EU's competitive standing in global fibre markets.

The Union's net import reliance climbed from near-zero to almost 16 %

The broad consequence of these trends is captured by the net-import-reliance indicator, which moved from –1.3 % (slight net exporter) in 2015 to +15.8 % in 2024. EU trade intensity rose from 33 % to 56 %, and the export propensity from 20 % to 33 %, underscoring that the sector is now far more integrated into global value chains – but with a heavy import tilt.

2. A tale of two price worlds: strong export inflation meets cheapening imports

The data reveal a striking divergence between the unit values of EU exports and of EU imports, with significant implications for the industry's structure.

Export prices soared by more than one third, cushioning the value decline

Despite the quantity collapse, the average export price rose from €3 630/tonne to €4 871/tonne (+34.2 %). The product-segment breakdown shows that higher-value woven fabrics (e.g. CN 5515 at €19 075/tonne in 2025) and artificial filament tow (CN 5502, €6 620/tonne in 2025) gained share in exports, while lower-value synthetic staple fibres (CN 5503) lost ground.

Import prices fell, making foreign basic fibres ever-cheaper for EU buyers

The average import price moved in the opposite direction, declining from €2 543/tonne to €2 314/tonne (–9.0 %). The combination of falling unit costs and rising volumes points to a growing reliance on competitively priced Asian upstream products, especially synthetic staple fibres (CN 5503), whose import quantity grew from 631 thousand tonnes to 761 thousand tonnes.

Trade flow	2015 value (bn €)	2025 value (bn €)	2015 quantity (kt)	2025 quantity (kt)	2015 price (€/t)	2025 price (€/t)
Exports	3.04	2.87	837	589	3 630	4 871
Imports	2.93	3.12	1 151	1 347	2 543	2 314

Source: EU trade overview

The artificial filament tow segment illustrates the shifting value pattern

Imports of artificial filament tow (CN 5502) jumped in value from €184 million to €415 million, while exports of the same heading surged from €79 million to €390 million, reflecting a rising intra-industry trade in higher-priced speciality tows. This two-way flow is a bright spot in an otherwise asymmetric picture.

3. Partners in flux: rising concentration, Brexit shock, and pandemic-era price spikes

The geography and stability of EU trade in staple fibres have been reshaped by a few powerful forces, increasing vulnerability.

Import sources became more concentrated, with China and Türkiye dominating

The Herfindahl-Hirschman Index (HHI) for extra-EU imports rose from 1 151 to 1 388, an increase of 20.7 %. China's export value to the EU grew by 22.5 % to €798 million, and Türkiye's by 36.7 % to €625 million. Conversely, several other traditional suppliers lost share: imports from Taiwan dropped by 57.8 %, Indonesia by 48.6 %.

Brexit and sanctions reshuffled EU export destinations

The list of top export partners reveals two dramatic falls:

- Exports to the **United Kingdom** collapsed from €286 million to €123 million (–57.0 %), with the steepest declines after 2020 – a direct consequence of the UK's exit from the single market.
- Sales to **Pakistan** halved (–49.2 %), while shipments to **Iran** were nearly wiped out: after averaging over 25 thousand tonnes of quantity during 2015-2019, they fell to just 302 tonnes in 2025 (–98.2 %), accompanied by a sharp price increase. This supply shock reflects the effect of sanctions.

Pandemic and post-pandemic price shocks hit both imports and exports

Several abrupt price shifts punctuate the series, detected as shock events:

- In 2020, the import price from **Türkiye** slumped by 34.1 %, triggering a huge volume surge that reshaped EU sourcing.

- In 2022, export prices to **China** jumped 45.3 % while volumes fell, and import prices from several Asian suppliers (Thailand +69.2 %, India +52.1 %, Indonesia +28.0 %) spiked, reflecting global supply-chain turmoil and higher energy costs.
- **Bangladesh** experienced an extreme export price shock in 2020 (+29.9 %), with volume plunging by nearly two-thirds, though this partner's share remained modest.

Conclusion

The decade 2015-2025 has turned the EU from a balanced player into a net importer of man-made staple fibres, with a trade deficit approaching a quarter of a billion euros. The erosion occurred despite a strong improvement in export unit values, because volumes were lost at a much faster pace than they were gained on the import side, where prices actually fell. Trade is now more concentrated among a few Asian partners, and the sector's exposure to geopolitical shocks – from Brexit to sanctions on Iran – is evident. The domestic production base has also shrunk in volume and value, reinforcing the impression of an industry that is retreating to higher-value niches while ceding bulk production to foreign suppliers. Going forward, the EU's increased import reliance and the volatility witnessed in recent years suggest a need for close monitoring of supply-chain resilience and continued efforts to defend competitive advantages in speciality fibres and technical textiles.

Generated on 2026-07-24 based on data from tradedashboard.eu