EU TRADE EXPLORER

Market evolution: Men's and boys' outerwear (CN 6201) — 2015–2025

Introduction

The EU's external trade in men's and boys' non-knitted outerwear (CN 6201) has undergone a profound transformation over the last decade. Value flows have more than doubled on the export side while imports rose modestly, reshaping both the geography of suppliers and customers and the very nature of the product mix exchanged. This report dissects three central dynamics — divergent price and volume developments, a structural realignment of trading partners, and the evolving roles of EU Member States — on the basis of data from the EU Trade Dashboard.

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1. Divergent paths for exports and imports: a trade deficit that is narrowing – but slowly

Export revenues soar while volumes stagnate

Between 2015 and 2025, EU extra-EU exports of CN 6201 rose from €986 million to €1 969 million, a leap of **+99.7 %** (trade overview). Over the same period, the tonnage shipped overseas barely moved (13 556 tonnes in 2015 vs. 13 136 tonnes in 2025, –3.1 %). Consequently, the implicit unit price jumped from €72 735/tonne to €149 877/tonne (**+106.1 %**). This indicates that EU exporters have shifted towards higher-value items, notably wool and fine animal hair garments, while gradually reducing shipments of basic synthetic-fibre coats.

Import expansion is purely volume-driven

Extra-EU imports grew from €2 476 million to €3 144 million (+27.0 %), a pace far lower than that of exports. The quantity imported rose in lockstep (+27.0 %, from 106 541 to 135 333 tonnes), meaning the average import price remained essentially unchanged (€23 236/tonne in 2015 vs. €23 232/tonne in 2025). The EU continues to source large volumes of low-price outerwear, mostly synthetic, from Asian low-cost producers.

The deficit improves, but remains sizeable

Despite the faster expansion of exports, the EU's trade balance in this chapter has stayed negative throughout the period. The deficit did shrink from €1 490 million to €1 175 million (–21.1 %), a sign of the growing competitiveness of EU exporters in higher market segments, but the absolute gap underscores the bloc's deep reliance on imports for mass-market garments.

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2. A re-ordered map of partners: from Chinese predominance to a broader Asian supply base

China's hold on imports weakens

China remains by far the largest supplier, yet its position has eroded. Chinese-sourced imports fell from €1 520 million to €1 321 million (–13.1 %), and its share in total import value shrank markedly, contributing to the drop in concentration (HHI value from 3 999 to 2 196, –45.1 %) (partner concentration). The HHI for import volume fell in parallel (–44.6 %), confirming a genuine diversification.

Import partner	Value 2015 (EUR mio)	Value 2025 (EUR mio)	Change (%)	Volatility (CV of volume)
China	1 519.7	1 320.8	–13.1	0.17
Bangladesh	137.0	426.7	+211.4	0.31
Myanmar	45.2	226.4	+401.3	0.48
Viet Nam	233.3	367.9	+57.7	0.13
Cambodia	15.1	148.0	+877.2	0.68
Türkiye	40.1	71.5	+78.4	0.33
United Kingdom	137.4	50.4	–63.3	0.70

Source: Top trading partners and volatility bars.

Newer suppliers have posted spectacular gains. Bangladesh, Myanmar and Cambodia together lifted their share from roughly 8 % to nearly 25 % of extra-EU purchases. However, these flows exhibit high year-on-year instability (CVs of 0.31–0.68), exposing importers to supply-side disruptions. A **price shock** was detected for Bangladesh in 2022, when import unit values jumped 22.6 % above the 2020-2021 baseline while volumes surged 52.8 %, probably reflecting pandemic-related bottlenecks and subsequent demand restocking (shock events). Post-shock, prices remained elevated (23.7 % above baseline) while quantities settled at a still-high level.

Exports pivot towards China, the United States and Ukraine

On the export side, the collapse of the United Kingdom as a destination (–26.4 %, from €301 million to €221 million) and the further contraction towards Russia (–37.9 %) were offset by explosive growth in China (+516.2 %, to €359 million), the United States (+132.2 %, to €209 million), Ukraine (+313.6 %), and Switzerland (+65.2 %). The **concentration of export destinations** has therefore fallen (HHI from 1 397 to 930, –33.4 %), as European firms actively diversified away from a single large neighbour to a wider set of affluent and emerging markets.

Export partner	Value 2015 (EUR mio)	Value 2025 (EUR mio)	Change (%)
United Kingdom	300.7	221.4	–26.4
China	58.2	358.9	+516.2
United States	89.9	208.9	+132.2
Switzerland	141.6	233.8	+65.2
Türkiye	44.2	103.3	+133.6
Ukraine	8.9	36.7	+313.6
Russian Federation	63.7	39.6	–37.9

3. The inner European engine: Italy’s supremacy and the rise of Poland

Italy and France propel export value, while the Netherlands and Poland hoist imports

From a Member-State perspective, Italy strengthened its role as the EU’s export powerhouse. Italian exports to non-EU countries soared from €444 million to €1 182 million (+166.2 %), making Italy responsible for 60 % of total extra-EU exports in 2025. France also recorded robust growth (+206.2 %) to €235 million, while Poland surged from a low base (+383.8 %, to €76 million). Germany, by contrast, posted only a moderate +38.4 % advance, and Spain’s exports declined by 14.9 % (reporters table).

On the import side, the Netherlands (+83.9 %) and Poland (+233.0 %) recorded the strongest growth, reflecting their logistics and distribution functions. Italy, already the largest importer, expanded by a more modest 17.5 %. Germany, the second-largest importer in 2015, saw a decline of 16.1 %, possibly linked to the redirection of some supply chains towards the Netherlands and Poland.

Specialisation clustering confirms a few outerwear champions

The specialisation map for 2025 shows that Romania, Denmark, Italy, Bulgaria and Poland have the highest Revealed Comparative Advantage (RCA > 1.5). Romania (RCA 2.52) and Denmark (RCA 2.30), despite their relatively small total trade, are exceptionally oriented towards these products. Italy (RCA 2.29), with a large trade weight, combines high specialisation with industrial scale. At the opposite extreme, Ireland, Malta and Finland record near-negligible RCA values (< 0.12).

Product composition: man-made fibres rule volumes, wool rules values

The segment breakdown for 2025 illustrates the structural divergence between imports and exports.

Imports (2025)

- 6201 40 (man-made fibres): 114 081 tonnes, average price €22 181/tonne
- 6201 30 (cotton): 13 748 tonnes, €24 388/tonne
- 6201 90 (other textile materials): 4 438 tonnes, €27 860/tonne
- 6201 20 (wool/fine animal hair): 3 066 tonnes, €50 290/tonne

Exports (2025)

- 6201 40 (man-made fibres): 9 040 tonnes, €134 589/tonne
- 6201 20 (wool/fine animal hair): 998 tonnes, €325 890/tonne
- 6201 30 (cotton): 2 142 tonnes, €126 266/tonne
- 6201 90 (other textile materials): 957 tonnes, €163 618/tonne

(Product segment breakdown)

Man-made fibre garments account for 84 % of import volumes but less than 70 % of import value, while wool and fine hair items represent a tiny volume share yet command unit values five to fifteen times higher in exports than typical synthetic imports. This gap perfectly mirrors the aggregate story: the EU sells craftsmanship and quality, and buys basic functionality.

Conclusion

The EU's outerwear trade with the rest of the world between 2015 and 2025 is a clear example of value-chain upgrading on the export side and sourcing fragmentation on the import side. Exporters have successfully repositioned themselves in premium segments, doubling revenue without increasing tonnage, while importers have diversified away from a heavy Chinese dependency towards a broad set of Asian suppliers. The internal geography of European trade has become more concentrated, with Italy acting as the undisputed export leader, even as Poland and the Netherlands grow as distribution hubs. The main risk going forward lies in the high volatility of the newer Asian sources and in the still-large deficit that leaves the EU exposed to global price shocks, as the 2022 Bangladesh price spike vividly illustrated.

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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.