EU TRADE EXPLORER

Market evolution: Men's shirts (CN 6205) — 2015–2025

Introduction

This report examines the extra-EU trade of the European Union in **Men's or boys' shirts (excl. knitted or crocheted, nightshirts, singlets and other vests)**, customs code 6205, over the period 2015–2025. The product grouping covers cotton shirts (620520), man-made fibre shirts (620530) and shirts of other textile materials (620590). The analysis draws exclusively on official trade data, comparing annual flows from 2015 to 2025, and identifies three central dynamics: a profound decoupling of traded volumes and unit values, a reconfiguration of sourcing and export partners, and a material shift within the category itself.

The Price-Volume Disconnect: How Unit Values Inflated While Tonnages Shrank

The decade was marked by a sharp divergence between the physical quantities traded and the average prices recorded, affecting both exports and imports. Overall trade figures

Export value edged up 2.9 % as a 62.6 % price surge outweighed a 36.7 % volume collapse

Export value in euros remained remarkably stable, rising from €908 million in 2015 to €935 million in 2025. This apparent steadiness masks a dramatic transformation: the tonnage shipped fell from 13 000 to just over 8 200, a drop of 36.7 %. The entire stability came from a 62.6 % increase in the average price per tonne, from €69 883 to €113 650.

Import value contracted 10.8 %, with a 23.1 % drop in quantity partly offset by a 16 % rise in average prices

Imports declined from €2.56 billion in 2015 to €2.28 billion in 2025. The quantity of shirts imported fell by 23.1 %, from 104 360 tonnes to 80 203 tonnes. Average import prices rose by 16.0 % (from €24 537 to €28 468 per tonne), cushioning but not reversing the volume-driven fall in total import value.

The EU’s trade deficit in shirts narrowed by 18.4 %, from €1.65 billion to €1.35 billion

Because imports lost more ground in absolute terms than exports, the trade gap improved from –€1 652 million in 2015 to –€1 349 million in 2025. The deficit narrowed by 18.4 %, largely due to the faster long-term decline in import volumes.

Geographical Rebalancing: The Rise of Bangladesh and the Shifting Export Map

The supplier and customer landscape changed fundamentally, reflecting both competitive shifts and major political-economic events. Top trading partners

Bangladesh widened its lead, while Chinese and Turkish shipments fell

Bangladesh strengthened its role as the dominant extra-EU supplier, with import value rising from €651 million to €781 million (+19.9 %). In contrast, China’s deliveries shrank by 32.8 % (from €464 million to €312 million). Turkey also lost ground (–27.6 %), whereas India posted a modest gain (+6.4 %) and Vietnam remained essentially flat (–0.8 %). The concentration of import sources increased, with the Herfindahl-Hirschman index (HHI) for imports climbing from 1 330 to 1 694. Concentration trends

Import partner	Value 2015 (€ M)	Value 2025 (€ M)	Change (%)
Bangladesh	651	781	+19.9
China	464	312	–32.8
India	245	261	+6.4
Turkey	322	233	–27.6
Vietnam	160	159	–0.8

Brexit caused a structural break, with UK trade collapsing from a top-5 partner to minor flows

The United Kingdom’s departure from the single market sharply disrupted historical patterns. EU imports from the UK plummeted from €131 million in 2015 to just €30 million in 2025 (–77.1 %). Exports to the UK fell from €227 million to €124 million (–45.4 %), ending its position as the number one export market. The volatility of UK flows illustrates the shock: the coefficient of variation for import quantities was 0.83, the highest among major partners. Volatility indicators

The United States and Switzerland became the EU's premier export markets, compensating for sanctions-driven declines in Russia

Exports to the United States rose 46.0 % to reach €144 million, and Switzerland grew 17.5 % to €130 million. Together they overtook the UK as the top two destinations. Meanwhile, exports to Russia fell by 41.0 % (from €50 million to €30 million), reflecting sanctions and trade restrictions. Turkey emerged as a notable growth market for EU exports (+60.1 %), further diversifying the export portfolio. The export HHI declined from 1 033 to 801, indicating a more dispersed set of markets. Export partner concentration

Export partner	Value 2015 (€ M)	Value 2025 (€ M)	Change (%)
United States	99	144	+46.0
Switzerland	111	130	+17.5
United Kingdom	227	124	–45.4
Turkey	27	43	+60.1
Russian Federation	50	30	–41.0

Fibre Shift: Cotton Shirts Lose Ground to Man-Made and Other Textiles

Beneath the aggregate trends, a significant restructuring of the product mix took place. Product segment comparison

Cotton shirts (620520) remained the largest sub-category but lost volume share, particularly in exports

Cotton shirts still accounted for the bulk of trade, but their physical volumes contracted sharply. Imports fell from 90 495 tonnes to 59 223 tonnes (–34.5 %), and exports dropped from 11 548 tonnes to 5 766 tonnes (–50.1 %). Value declines were more moderate thanks to rising unit prices (import price +9.5 %, export price +52.0 %). Export value of cotton shirts went from €825 million to €626 million.

Man-made fibre shirts (620530) recorded the strongest relative growth in exports, value up 269 %

The man-made fibre segment expanded on all fronts. Export volume grew from 668 tonnes to 1 125 tonnes (+68.4 %), while the average price more than doubled (+119 %), pushing export value from €23 million to €86 million. Imports also rose, from 10 926 tonnes to 12 685 tonnes (+16.1 %), with a 52.9 % price increase lifting import value from €170 million to €302 million.

Other textile shirts (620590) experienced a value surge, tripling in exports, backed by high unit prices

Shirts made of other textile materials (linen, silk, blends, etc.) were the most dynamic niche. Export volume increased from 780 tonnes to 1 331 tonnes (+70.7 %), while the export price soared by 116 %, resulting in a value jump from €60 million to €222 million (+269 %). Imports of these shirts more than doubled in volume (from 2 939 tonnes to 8 294 tonnes) and tripled in value (from €90 million to €333 million), with an import price increase of 30.6 %.

Sub-category	Import value 2015 (€ M)	Import value 2025 (€ M)	Export value 2015 (€ M)	Export value 2025 (€ M)
Cotton (620520)	2 300	1 648	825	626
Man-made fibres (620530)	170	302	23	86
Other textiles (620590)	90	333	60	222

Conclusion

The EU’s extra-EU trade in men’s shirts between 2015 and 2025 was shaped by three interlocking forces. First, a strong price-volume decoupling: export value held steady only because unit prices soared by 63 %, masking a 37 % volume loss, while import value fell more slowly than volume thanks to a 16 % price rise. Second, the partner map tilted decisively toward Bangladesh on the supply side and toward the United States and Switzerland on the demand side, with Brexit and sanctions redrawing historical flows. Third, the composition of the product group shifted from basic cotton shirts toward higher-value man-made and other textile shirts, especially in exports. The overall deficit narrowed by 18 %, but the market’s resilience increasingly depends on elevated pricing and a more diversified, upmarket product mix.
