EU TRADE EXPLORER

Market evolution: Men's tailored clothing (CN 6203) — 2015–2025

Product: Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (excl. knitted or crocheted, wind-jackets and similar articles, separate waistcoats, tracksuits, ski suits and swimwear)

Data window: 2015-01 → 2025-12 (yearly frequency; incomplete periods excluded)

Introduction

Between 2015 and 2025, EU external trade in men's tailored clothing (CN 6203) underwent a marked deepening of the import deficit, a reorganisation of sourcing and export destinations, and a striking internal redistribution of export activity among Member States. Total imports rose by 16.1 % in value, while export value edged up only 8.6 %, yet the physical quantities moved in opposite directions: import volumes increased by 11.0 % whereas export volumes contracted by a quarter. The following sections document these dynamics, relying exclusively on the figures from the EU trade dashboard.

The deepening import deficit: steady volume growth and stagnant external prices

Imports expand in value and volume, driving a wider trade gap

EU imports of CN 6203 grew from €8.16 billion in 2015 to €9.47 billion in 2025 (+16.1 %), with quantities moving from 429 thousand tonnes to 477 thousand tonnes (+11.0 %). Exports, by contrast, increased only modestly in value, from €3.23 billion to €3.50 billion (+8.6 %), while export volumes shrank from 55.3 thousand tonnes to 41.3 thousand tonnes (−25.3 %). As a result, the already large trade deficit widened from −€4.93 billion to −€5.96 billion, a deterioration of 21.0 % (see Table 1).

Table 1 — EU external trade in CN 6203, 2015 vs. 2025

Indicator	2015	2025	Change (%)
Import value (€ bn)	8.16	9.47	+16.1
Import quantity (thsd. t)	429.2	476.6	+11.0
Export value (€ bn)	3.23	3.50	+8.6
Export quantity (thsd. t)	55.3	41.3	−25.3
Trade balance (€ bn)	−4.93	−5.96	−21.0
Import price (€/t)	19 001	19 863	+4.5
Export price (€/t)	58 322	84 732	+45.3

Source: EU trade overview (CN 6203).

Export prices surge while volumes shrink, pointing to a dual-track market

The average unit value of EU exports rose by 45.3 %, from €58 322 per tonne to €84 732 per tonne. In contrast, import prices remained almost flat, rising just 4.5 % from €19 001 to €19 863 per tonne. This gap indicates that the EU has increasingly specialised in higher-value, typically branded or luxury items sold abroad, while continuing to import mass-market garments at stable, low unit values. The combination of falling export volumes and rising unit prices suggests a “fewer but pricier” external shipment profile, whereas imports reflect sustained volume demand for affordable basics.

Geographic reshuffling: shifting sourcing patterns and export destinations

Imports pivot from China to Bangladesh, Pakistan and other Asian suppliers

The origin of EU imports shifted significantly. China, once the second-largest supplier, saw its shipments fall by 13.9 % in value, from €1.67 billion to €1.44 billion. Bangladesh reinforced its position as the top source, growing 45.0 % to €2.68 billion. Pakistan expanded by 62.7 %, Viet Nam by 35.0 %, and India by 28.1 %. Imports from Türkiye, however, contracted slightly (−4.5 %). The Herfindahl-Hirschman Index for import values rose from 1 275 to 1 381 point, indicating a mild increase in supplier concentration (Table 2).

Table 2 — Top extra-EU import partners, 2015 vs. 2025 (€ billion)

Partner	2015	2025	Change (%)
Bangladesh	1.85	2.68	+45.0
China	1.67	1.44	−13.9
Pakistan	0.69	1.12	+62.7
Türkiye	1.02	0.97	−4.5
Tunisia	0.54	0.62	+14.0
Viet Nam	0.29	0.39	+35.0
India	0.19	0.24	+28.1

Source: Top partner analysis.

Brexit and geopolitical shocks reshape EU export geography

EU exports to the United Kingdom plunged by 35.9 %, from €664 million to €425 million, while the export volatility coefficient for the UK (0.40) remained the highest among major destinations. Shipments to Russia fell 40.1 % following sanctions, and Albania recorded a 26.0 % drop. In contrast, exports to Switzerland jumped 59.3 % to €829 million, making it the largest external market. The United States (+12.8 %), Türkiye (+58.1 %), and Norway (+39.3 %) also absorbed significantly more EU goods. A notable price shock occurred on the Swiss market in 2023, when the unit value temporarily surged 19.4 % above its 2021-2022 baseline while volumes dropped, as detailed in the supply-shock monitor.

Table 3 — Top extra-EU export markets, 2015 vs. 2025 (€ million)

Partner	2015	2025	Change (%)
Switzerland	520	829	+59.3
United Kingdom	664	425	−35.9
United States	406	458	+12.8
Türkiye	96.5	152.6	+58.1
Norway	100.0	139.3	+39.3
Russian Federation	201.9	120.9	−40.1
Albania	23.6	17.5	−26.0

Source: Top partner analysis.

Structural transformation in EU export specialisation: volume erosion and an upmarket shift

Spain’s export collapse contrasts with gains in Poland, France and the Netherlands

Among EU Member States, the distribution of external exports changed dramatically. Italy remained the largest exporter with a stable value of about €1.24 billion (+1.6 %), but Spain’s exports plummeted by 55.9 %, from €488 million to €215 million. France (+75.8 %), the Netherlands (+86.8 %), and especially Poland (+298.3 %) saw robust increases. Germany also grew by 34.0 %. On the import side, the Netherlands (+29.2 %) and Denmark (+65.3 %) expanded strongly, while Belgian imports contracted by 38.9 % (Table 4).

Table 4 — Top EU exporting and importing Member States, 2015 vs. 2025 (€ million)

Member State	Flow	2015	2025	Change (%)
Italy	Export	1 224	1 244	+1.6
Germany	Export	631	846	+34.0
Spain	Export	488	215	−55.9
France	Export	189	333	+75.8
Netherlands	Export	112	209	+86.8
Poland	Export	44.1	175.5	+298.3
Sweden	Export	82.6	115.1	+39.3
Germany	Import	2 339	2 657	+13.6
Spain	Import	1 110	1 166	+5.0
Netherlands	Import	1 004	1 297	+29.2
France	Import	1 047	1 027	−1.9
Italy	Import	936	981	+4.9
Belgium	Import	472	288	−38.9
Denmark	Import	265	438	+65.3

Source: Reporter breakdown.

The specialisation analysis confirms that Denmark (rsca 0.55), Poland (rsca 0.32), Romania (rsca 0.27), Bulgaria (rsca 0.45) and Portugal (rsca 0.16) are the most specialised EU countries in this product group, whereas Ireland, Malta and Finland show strongly negative specialisation indices (see the concentration & specialisation dashboard).

High-value wool garments dominate the EU’s external offer despite plunging volumes

The product-segment breakdown reveals a pronounced upmarket drift in EU exports. While cotton trousers (620342) remained the largest export category by value (€1.57 billion in 2025), their shipped quantity fell by a quarter (from 34.8 thousand tonnes to 26.0 thousand tonnes), compensated by a unit price increase from €40 156/t to €60 451/t. Wool suits (620311) saw a dramatic volume contraction of 64.5 % (from 2.53 thousand tonnes to 0.90 thousand tonnes), yet the unit value soared from €186 403/t to €287 486/t. Wool jackets (620331) and cotton jackets (620332) similarly lost volume but gained strongly in unit price (Table 5). Import volumes, by contrast, are overwhelmingly driven by low-unit-value cotton trousers (323.8 thousand tonnes, average import price €16 746/t) and synthetic-fibre trousers (87.4 thousand tonnes, €22 221/t), as shown in the product segment comparison.

Table 5 — EU export of selected CN 6203 sub-headings, 2015 vs. 2025

Product (code)	Volume 2015 (t)	Volume 2025 (t)	Change (%)	Unit value 2015 (€/t)	Unit value 2025 (€/t)
Cotton trousers (620342)	34 762	25 995	−25.2	40 156	60 451
Synthetic trousers (620343)	6 077	6 138	+1.0	43 903	65 282
Wool suits (620311)	2 531	897	−64.5	186 404	287 486
Wool jackets (620331)	1 944	1 092	−43.8	173 449	328 850

Source: Product segment comparison.

The import side saw price shocks in 2022 for Bangladesh and Pakistan, where unit import prices jumped 20.9 % and 21.1 % above the 2020-2021 baseline, reflecting tight post-COVID supply conditions and higher input costs. These shocks were subsequently partly absorbed, with prices returning closer to trend by 2024-2025 (see shock events).

Conclusion

EU external trade in men’s tailored clothing over the past decade has been defined by three concurrent trends: a persistently growing import deficit fuelled by rising volumes of low-cost garments from Bangladesh, Pakistan and Viet Nam; a major realignment of export destinations away from the United Kingdom and Russia towards Switzerland, the United States and Türkiye; and a profound structural change in the EU’s own export mix, where sharply falling quantities are offset by steep price increases, reflecting a concentration on the premium and luxury segment. While aggregate import prices remained flat, export unit values surged, widening the quality gap between what the EU buys from the world and what it sells. The reallocation of export capacity among Member States, with

Spain’s collapse and Poland’s rapid ascent, further underscores the ongoing transformation of the EU’s apparel supply chain.

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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.