Market evolution: Nonwovens and special yarns (CN 56) — 2015–2025

Introduction

Between 2015 and 2025 the European Union's external trade in Chapter 56 (wadding, felt, nonwovens, special yarns, twine, cordage, ropes and cables) underwent a profound shift. While the EU remained a net exporter, its surplus narrowed by nearly one-third (−32.8 %), from EUR 1.42 billion to EUR 956 million. Total exports grew 18.9 % in value, whereas imports jumped 63.0 %. Beneath these aggregate numbers lie three interlocking stories: a fast-rising concentration of import sources towards China and Türkiye, a strong value-upgrading process in EU exports that offset a decline in shipped volumes, and several price shocks that tested supply-chain resilience. The following sections dissect each of these dynamics using the data provided by the TradeDashboard.

1. Imports surge as China and Türkiye consolidate their role as key suppliers

Import values from the two largest partners more than double over the decade

The EU's purchases from China rose from EUR 363 million to EUR 890 million (+145.1 %), while imports from Türkiye expanded from EUR 184 million to EUR 478 million (+160.0 %). Together these two partners accounted for roughly half of all extra-EU imports in 2025, a concentration reflected in a steep rise of the import Herfindahl-Hirschman Index (HHI) from 1 188 to 1 703 (+43.4 %).

Partner	2015 (EUR mn)	2025 (EUR mn)	Change (%)
China	363.1	889.8	+145.1
Türkiye	184.0	478.4	+160.0
Israel	69.5	96.9	+39.5
United Kingdom	233.5	169.1	−27.6
United States	288.3	332.0	+15.1
India	28.3	62.6	+121.2
Saudi Arabia	33.8	12.7	−62.4

Source: Top partners.

Other notable developments include a 121 % jump in imports from India and a halving of supplies from Saudi Arabia. The United Kingdom, no longer an EU member, saw its deliveries to the Union shrink by almost 28 %.

The EU's trade surplus in the sector shrinks by almost one-third

Driven by this import boom, the EU's trade balance moved from a surplus of EUR 1 422 million in 2015 to EUR 956 million in 2025 (−32.8 %). Import quantities rose 67.2 % (from 381 thousand tonnes to 636 thousand tonnes), while export quantities actually fell by 11.9 %. Because import prices remained virtually flat (−2.6 %) and export prices surged (+34.9 %), the value gap narrowed only partly. The detailed figures are shown below.

Indicator	2015	2025	Change (%)
Exports (EUR mn)	3 092.4	3 677.5	+18.9
Imports (EUR mn)	1 670.2	2 721.7	+63.0
Trade balance (EUR mn)	1 422.2	955.8	−32.8
Export volume (kt)	629.3	554.6	−11.9
Import volume (kt)	380.5	636.4	+67.2
Export unit value (EUR/t)	4 913.7	6 630.6	+34.9
Import unit value (EUR/t)	4 389.0	4 276.6	−2.6

Source: EU trade overview.

2. Export growth driven by value upgrading and geographic rebalancing

Export unit values climb sharply, led by nonwovens and wadding

The EU's export volume fell by 11.9 %, yet total export value grew by 18.9 %. The discrepancy is explained by a remarkable 34.9 % increase in the average export price per tonne. The dominant product group, nonwovens (CN 5603), illustrates this dynamic: export volume dropped from 437 kt to 363 kt, but the average price jumped from EUR 4 441/t to EUR 6 062/t (+36.5 %), lifting export value from EUR 1 942 million to EUR 2 203 million. A similar pattern holds for wadding (CN 5601) and twine/cordage (CN 5607), where higher unit values more than compensated for flat or declining volumes.

Product (CN)	2015 value (EUR mn)	2025 value (EUR mn)	Change (%)	2015 price (EUR/t)	2025 price (EUR/t)	Price change (%)
5603 Nonwovens	1 941.6	2 203.0	+13.5	4 441	6 062	+36.5
5607 Twine/ cordage	313.3	368.0	+17.5	4 164	5 111	+22.8
5601 Wadding	379.1	460.1	+21.4	7 968	9 454	+18.7
5608 Nets	141.8	214.6	+51.3	6 566	8 046	+22.5

Source: Product segment comparison.

The United States and Morocco fill much of the gap left by collapsing Russian demand

The EU's export geography changed markedly. The most striking loss was the Russian Federation, where sales tumbled from EUR 184 million to EUR 70 million (−61.7 %), a direct consequence of the sanctions and trade disruption following the 2022 invasion of Ukraine. This shortfall was compensated by strong gains in the United States (+EUR 158 million, +34.8 %) and Morocco (+EUR 64 million, +84.4 %). Exports to the United Kingdom, still the largest single market, grew modestly (+8.6 %), while those to Switzerland and China advanced in a more subdued manner.

Partner	2015 (EUR mn)	2025 (EUR mn)	Change (%)
United Kingdom	468.9	509.1	+8.6
United States	452.4	610.0	+34.8
Türkiye	215.1	213.1	−0.9
Switzerland	193.9	221.7	+14.3
Russian Federation	184.0	70.4	−61.7
China	197.4	212.8	+7.8
Morocco	76.4	140.9	+84.4

Source: Top partners.

Nonwovens remain the single most important export pillar, but special yarns gain ground

The product segment breakdown confirms the overwhelming role of nonwovens, which accounted for 60 % of all extra-EU exports in 2025. However, several smaller segments expanded rapidly: special textile-covered rubber thread and cord (CN 5604) saw its unit value rise from EUR 9 335/t to EUR 15 294/t, and articles of yarn or cordage (CN 5609) almost doubled in unit price, reflecting growing demand for high-performance and technical textile products.

3. Rising concentration and price shocks expose vulnerabilities despite a robust production base

Import sourcing grows more concentrated, heightening supply risks

The import HHI rose from 1 188 to 1 703 (+43.4 %), confirming that the EU now relies on a narrower set of suppliers. The volume-based HHI for imports doubled (+91.5 %, from 1 352 to 2 589), indicating that the physical sourcing is even more polarised. By contrast, the export HHI was essentially stable (695 → 667, −4.0 %), meaning the EU's customer base remained broadly diversified.

Source: Concentration HHI.

Price shocks in 2022 and 2023 hit key partners, revealing latent pinch points

The period was not free of turbulence. The most significant price shocks were:

- **India (imports)**: in 2022 the import price of Indian goods jumped 14.3 % above the 2020-2021 baseline, when volumes were already rising, signalling tense supply conditions.
- **Ukraine (exports)**: a 16.8 % price spike in 2022 accompanied a sharp volume contraction, reflecting the immediate impact of war-related disruptions.
- **Mexico (exports)**: unit prices surged 28.1 % in 2022 while volumes rose moderately, pointing to stressed logistics or increased cost of premium products.
- **India (exports)**: a delayed but massive 70.2 % price shock occurred in 2023, when EU shipments to India shrank in volume but jumped in price, likely reflecting a shift towards higher-value niche goods.

Source: Price shocks.

These events, though short-lived, underline the sector's sensitivity to geopolitical and logistical upheavals.

EU production expands strongly but fails to keep pace with import penetration

Over the available production data (2003-2024), EU output of Chapter 56 goods rose from 2 095 million tonnes to 2 843 million tonnes (+35.7 %), and the value of production climbed from EUR 5.68 billion to EUR 10.34 billion (+82.1 %)—a clear sign of a more valuable product mix. Yet import penetration still deepened. The net-import reliance indicator remained negative (net exporter), but moved from −13.6 % to −12.6 % (a change of

+7.1 %), meaning the EU is less self-sufficient than it was in 2015. Meanwhile, trade intensity grew from 29.7 % to 48.2 % (+62.2 %) and export propensity from 22.4 % to 35.6 % (+58.8 %), showing that the sector has become markedly more integrated in international trade.

Sources: Production volumes, Net import reliance, Trade intensity, Export propensity.

Conclusion

Between 2015 and 2025 the EU's trade in nonwovens and special yarns evolved into a larger, more valuable, but also more import-dependent and concentrated activity. Exports grew in value largely through price increases and product upgrading, compensating for a decline in shipped volumes. Simultaneously, import values soared as China and Türkiye cemented their roles as dominant suppliers, eroding the trade surplus. The sector's expanding production base and rising trade intensity enhance its global footprint, but the heightened concentration of imports and the occurrence of sharp price shocks signal growing exposure to supply-side disruptions. Going forward, these twin forces—value-driven export resilience and concentrated import dependency—will define the industry's risk profile.

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