EU TRADE EXPLORER

Market evolution: Other vegetable fibres and paper yarn (CN 53) — 2015–2025

Introduction

This report examines the European Union’s extra-EU trade in Chapter 53 goods (“Other vegetable textile fibres; paper yarn and woven fabrics of paper yarn”) from 2015 to 2025. The analysis covers the full basket of raw fibres, yarns and woven fabrics of flax, jute, hemp, coconut, ramie and other vegetable fibres. Over the decade the EU consolidated a strong trade surplus, more than tripling in value, while its own production shrank dramatically. A handful of export markets and a small club of Member States drove the expansion, and both import supply and export sales became more concentrated, exposing the sector to price shocks and rising external reliance.

1. A boom in flax-based exports reshapes the trade balance

China remains the dominant destination, but India and Morocco see the most explosive growth

Total EU exports of CN 53 goods rose from €635 million in 2015 to €1.61 billion in 2025 (+154 %), while export volumes increased by 71 % (from 209 thousand tonnes to 356 thousand tonnes) – a clear sign of strong upward pressure on unit prices (trade overview). The export surge was heavily skewed towards Asia and North Africa.

Export partner	Value 2015 (€ mn)	Value 2025 (€ mn)	Change
China	347.0	913.5	+163 %
India	22.7	168.4	+640 %
Morocco	13.6	107.6	+694 %
United Kingdom	39.0	59.2	+52 %
United States	54.4	64.0	+18 %
Hong Kong	22.3	34.0	+53 %
Switzerland	9.2	12.5	+36 %

India and Morocco recorded the most spectacular accelerations, transforming from marginal buyers into pillars of EU export growth (top partners). China, however, remained the single biggest outlet, absorbing more than half of all extra-EU exports throughout the period.

Flax products command high unit values and drive the export mix

The product-level breakdown reveals that “Flax, raw or processed, but not spun” (5301) and “Woven fabrics of flax” (5309) dominated the export basket by value. In 2025, raw/processed flax accounted for €1.21 billion (75 % of exports) and flax fabrics for another €320 million (20 %). Flax yarn (5306) added €23 million. Unit prices for flax fabrics reached around €31 000 per tonne in 2025, far above the average export price of €4 525 per tonne, illustrating the high value-added nature of linen trade (product segment breakdown).

Export concentration increased only modestly, partially offset by the rise of new markets

The Herfindahl-Hirschman Index (HHI) for exports rose from 3 157 in 2015 to 3 419 in 2025 (+8 %), indicating a slight tightening of destination concentration. However, the dynamics partly worked in opposite directions: while China’s share grew, the rapid emergence of India and Morocco introduced a counterbalancing diversification effect (concentration HHI).

2. Import trends: China tightens its grip and supply shocks reveal vulnerabilities

China and India led import growth, while traditional suppliers stagnated or declined

EU imports of CN 53 products increased from €333 million to €547 million (+65 %), with volumes rising only 16 % (from 210 kt to 243 kt). The import side, therefore, also experienced significant price inflation. China consolidated its position as the largest origin, growing from €108 million to €238 million (+120 %), followed by India (€43 million to €109 million, +152 %) (import top partners).

Import partner	Value 2015 (€ mn)	Value 2025 (€ mn)	Change
China	108.0	238.1	+120 %
India	43.2	108.9	+152 %
Sri Lanka	18.9	20.2	+7 %
Bangladesh	31.8	22.3	–30 %
Belarus	28.2	23.6	–16 %
Brazil	7.0	6.6	–6 %

Sri Lanka remained stable, whereas Bangladesh and Belarus lost ground, contributing to a shift towards the East Asian supplier base.

Rising supplier concentration heightens exposure to price disruptions

Import supply concentration (HHI) jumped from 1 600 in 2015 to 2 417 in 2025 (+51 %), a much sharper increase than on the export side. By volume, the HHI more than doubled, from 1 622 to 3 869 (+139 %). This concentration makes EU buyers more vulnerable to supply shocks and price volatility (import concentration).

A 2022 price spike on US exports and Sri Lankan imports reveals the market's fragility

Two significant price shocks punctuated the decade. In 2022, the price of EU flax exports to the United States soared by 160 % above the 2020-2021 baseline, while volumes collapsed to less than half the pre-shock level. Simultaneously, import prices from Sri Lanka jumped 62 %, far surpassing normal fluctuations. These events, detected with high abnormality scores, underscore how tightly capacity constraints can translate into extreme price moves in this sector (shock events).

3. A shrinking domestic base pushes the EU towards greater external dependence

Domestic production has nearly halved, sharply raising the export propensity

EU production of CN 53 goods (value) fell from €966 million in 2003 to €378 million in 2024 (–61 %), and output volumes shrank from 241 thousand tonnes to just 93 thousand tonnes over the same period. The continuous erosion of the domestic fibre and yarn industry has dramatically boosted the role of trade. The export propensity (exports / production) surged from 61 % in 2015 to 93 % in 2024, meaning the EU now sells almost everything it produces abroad (production volumes and export propensity).

Trade specialisation is concentrated in a few Member States, led by France and Belgium

In 2025, only a handful of Member States displayed a revealed comparative advantage in this chapter. Lithuania, France, Portugal, Estonia and Italy were the most specialised exporters, with Lithuania holding an RSCA of 0.79 and France 0.60. France and Belgium together generated nearly 60 % of all extra-EU exports of CN 53 goods (France €616 million, Belgium €617 million in 2025). Italy, Spain and the Netherlands also ranked high among EU exporters, but countries such as Germany, Poland and most Central European economies were net importers with very low specialisation (specialisation map). This geographic concentration within the EU adds a further layer of structural vulnerability.

Trade intensity and net-import reliance signal growing structural exposure

Trade intensity (exports + imports relative to production) climbed from 42 % in 2015 to 97 % in 2024, reflecting the sector's near-complete integration in international markets. The net-import reliance indicator – which captures the share of apparent consumption met by net imports – turned from a slightly negative –0.9 % in 2015 to a positive +10.0 % in 2024. Even though the EU's monetary trade surplus expanded, the combination of shrinking domestic output and strong import demand means the region has moved from a self-sufficient position to one that relies, on balance, on foreign supply (net import reliance and trade intensity).

Conclusion

The 2015-2025 period reshaped the EU's position in vegetable fibre and paper yarn trade. Exports flourished on the back of flax products bound for a handful of rapidly growing markets, while domestic production contracted relentlessly. Imports became more concentrated and more expensive, with occasional price shocks highlighting the fragility of supply chains. The EU's surplus widened in monetary terms, yet structural indicators – a near-doubled trade intensity, a tripled export propensity and a newly positive net-import reliance – point to an industry that is ever more dependent on global flows and increasingly exposed to external risks. Future monitoring should focus on the interplay between the EU's remaining niche specialisation, the concentration of trading partners, and the evolution of raw flax supply from within and outside the Union.
