Market evolution: Plastic footwear (CN 6402) — 2015–2025

Introduction

Plastic footwear (CN 6402) represents a significant segment of the EU’s textile-related trade. Over the 2015–2025 period, the EU’s external trade in these products has undergone a striking transformation: a strong increase in value has been accompanied by a divergent evolution of volumes, a reconfiguration of key trade partners, and a marked rise in import dependency. This report interprets the main dynamics captured by the data, drawing on the dashboard’s trade overview, partner-level detail, concentration indicators, and vulnerability metrics.

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1. Value gains driven nearly entirely by rising unit prices

A 73 % increase in export value contrasts with an almost unchanged export volume

Between 2015 and 2025, the value of EU exports of plastic footwear climbed from €1.14 bn to €1.97 bn, a rise of 73 %. Over the same window, the exported quantity barely moved, falling from 51.6 thousand tonnes to 51.4 thousand tonnes (–0.5 %). The entire value growth can therefore be attributed to a 73.8 % jump in average export unit price (from €22.1 /kg to €38.4 /kg). This points to a powerful shift towards higher-quality, higher-priced products in extra-EU sales.

Imports grow in both volume and value, but price increase is modest

On the import side, value rose by 32.2 % (from €4.47 bn to €5.91 bn), while volume expanded by 27.4 % (from 392.7 kt to 500.2 kt). Import prices increased only moderately (+3.7 %, from €11.4 /kg to €11.8 /kg), indicating that the EU continued to source large volumes of relatively low-cost plastic footwear even as its own export prices soared.

Indicator	2015	2025	Change
Exports (€)	1.14 bn	1.97 bn	+73.0 %
Export quantity	51.6 kt	51.4 kt	–0.5 %
Export unit price	€22.1 /kg	€38.4 /kg	+73.8 %
Imports (€)	4.47 bn	5.91 bn	+32.2 %
Import quantity	392.7 kt	500.2 kt	+27.4 %
Import unit price	€11.4 /kg	€11.8 /kg	+3.7 %

Source: General Overview – trade tab.

The trade deficit widens in value, reflecting the asymmetric growth

Because import value grew from a much larger base, the EU's deficit in this product category deepened from –€3.33 bn in 2015 to –€3.94 bn in 2025 (–18.2 %). Together with the volume-price asymmetry, this underscores a structural pattern: the EU sells fewer but increasingly expensive plastic shoes abroad, while absorbing ever-larger quantities of low-cost imports.

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2. A profound rebalancing of supplier and customer geography

Import sources diversify rapidly away from China

China remained the leading extra-EU supplier, with imports of €3.04 bn in 2025 (4.9 % above 2015). However, its share eroded as other Asian suppliers grew far faster: imports from Viet Nam more than doubled (+112.1 %, reaching €1.32 bn), Indonesia expanded by 114.9 %, Cambodia by 179.9 %, and Bangladesh by 142.6 %. The HHI concentration index for imports fell from 4 472 to 3 275 (–26.8 %), confirming a measurable broadening of supply.

The United Kingdom re-classified as a third country transforms both flows

In imports, UK shipments collapsed from €259 mn in 2015 to €34 mn in 2025 (–86.9 %), as the UK ceased to be an intra-EU source. For exports, the UK remained the single largest destination (€355 mn in 2025), but its relative weight shrank, while its price shock in 2022 (+20.8 % price jump) illustrates the adjustment after the Trade and Cooperation Agreement.

Export destinations pivot toward North America and Switzerland, with Türkiye emerging as a dynamic market

Exports to the United States soared by 157.2 % (€367 mn in 2025) and to Switzerland by 200.2 % (€338 mn). Türkiye, while smaller in absolute terms, saw a 174.9 % gain (€194 mn). These shifts, combined with stable or declining volumes to traditional partners such as Algeria (–22.2 %), drove export HHI concentration down by 30.9 % (from 1 639 to 1 132). The trade flow is now spread across a wider set of markets.

Partner (imports)	2015 (€ mn)	2025 (€ mn)	Change
China	2 900	3 043	+4.9 %
Viet Nam	621	1 316	+112.1 %
Indonesia	192	413	+114.9 %
United Kingdom	259	34	–86.9 %

Partner (exports)	2015 (€ mn)	2025 (€ mn)	Change
United Kingdom	407	355	–12.9 %
United States	143	367	+157.2 %
Switzerland	113	338	+200.2 %
Türkiye	71	194	+174.9 %

Source: Top partners by value.

3. Domestic production upgrades while import dependence deepens

EU-based production quantity falls, but value climbs sharply

Between 2015 and 2024 (the last available production data), EU output volume dropped by 31.1 % (from 78.4 mn pairs to 54.0 mn pairs), while production value surged by 48.8 % (from €803 mn to €1 195 mn). The resulting unit value almost doubled, mirroring the export price trend and pointing to a strategic repositioning of domestic manufacturing towards higher-value segments.

Specialisation is concentrated in a handful of Member States

In 2025, the most specialised extra-EU exporters (positive RSCA) were Belgium, Poland, Italy, Slovakia and Romania. Germany, although not as specialised, remains by far the largest exporter by value (€651 mn, +167.8 % vs 2015). These countries combine production capacity with a strong orientation towards third-country markets, as captured by the specialisation map.

Net import reliance grows, signalling heightened external vulnerability

The net import reliance ratio rose from 54.0 % in 2015 to 74.1 % in 2025 (+37.3 %). This means the EU now depends on non-EU countries for nearly three-quarters of the plastic footwear it absorbs. Simultaneously, export propensity increased from 59.3 % to 158.8 % (+167.7 %), indicating that EU producers are tightly woven into global value chains—selling a large share of output abroad while relying on imports for domestic consumption.

Conclusion

The EU's plastic footwear trade in the last decade has been defined by a paradox: export value soared entirely on the back of higher unit prices, while volumes stagnated; meanwhile, the steady rise in low-cost imports deepened the trade deficit. The supplier map diversified markedly, with Viet Nam, Indonesia and other Southeast Asian countries rapidly gaining ground, and the UK's departure triggered a lasting reorganisation of both imports and exports. Within the EU, a more concentrated band of Member States pushed into higher-value production, but the bloc's overall import dependency increased substantially. These intertwined dynamics highlight a sector that is moving upmarket in its outward sales yet grappling with an ever-greater reliance on third-country supply—a balance that merits close monitoring should trade disruptions occur.
