EU TRADE EXPLORER

Market evolution: Raw silk (CN 50) — 2015–2025

Introduction

Over the 2015–2025 period, the European Union's trade in raw silk (CN 50) has been shaped by a pronounced shift in the composition of imports and exports, a reorientation of key trading partners, and growing external dependency. Total extra-EU imports fell from €354.8 million to €302.0 million (–14.9 %), while exports contracted from €203.9 million to €124.8 million (–38.8 %), widening the trade deficit from –€150.9 million to –€177.2 million. Trade overview Behind these headline figures lie deep structural changes that this report examines across three dimensions: the evolving product mix, the rebalancing of partner relationships, and the vulnerabilities stemming from heightened import reliance and market concentration.

From fabric buyer to silk processor: the EU's changing import mix

Raw silk and silk waste imports have held steady while woven fabric imports and exports have collapsed.

The product-level data reveal a clear divergence between upstream raw materials and downstream finished goods. Product breakdown

Imports of raw silk (CN 5002) edged up in value from €81.5 million to €95.2 million (+16.9 %) despite a slight volume decline (–1.7 %), while imports of silk waste (CN 5003) remained broadly stable at around €28 million → €26.2 million. In contrast, imports of woven silk fabrics (CN 5007) plunged from €182.4 million to €115.5 million (–36.7 %) and export of the same fabrics shrank from €184.8 million to €108.2 million (–41.5 %). The EU has thus transformed from a net exporter of silk fabrics (2015 surplus of €2.4 million) into a net importer (2025 deficit of €7.3 million), while keeping its raw-material intake stable.

Yarn spun from silk waste has gained ground, reflecting new processing dynamics within the EU.

A notable exception to the general decline is yarn spun from silk waste (CN 5005). Imports of this semi-processed input rose from €23.7 million to €38.3 million (+61.6 %), with volumes increasing from 482 tonnes to 728 tonnes (+51.0 %). At the same time, imports of pure silk yarn (CN 5004) fell from €36.4 million to €25.1 million (–31.1 %). This suggests that EU processors are increasingly substituting pure silk yarn with waste-based yarn, possibly for cost-competitive production. On the export side, waste-yarn shipments also grew, from €3.9 million to €5.3 million, reinforcing the picture of an integrated EU processing sector focused on mid-market yarns.

Domestic production and export prices indicate a move up the value chain despite lower volumes.

EU production of silk and silk articles (Prodcom data) contracted from 42.7 million kg to an estimated 38.7 million kg (–9.3 %) between 2015 and 2024, while production value fell less sharply, from €528 million to €466 million (–11.7 %). Production volumes
Over the same window, the average unit price of EU silk exports increased by 18.4 %, from about €133 000 per tonne to €157 000 per tonne. Trade overview These parallel movements—volumes down, prices up—point to a strategic repositioning towards higher-quality, higher-value niche products that generate more revenue per unit of physical input.

Navigating geopolitical and commercial realignments: the reorientation of EU silk trade partnerships

China’s dominance has deepened, leaving little room for other suppliers.

China already accounted for 79 % of extra-EU silk imports in 2015 (€280.4 million out of €354.8 million); by 2025 its share had risen to 83 % (€249.5 million out of €302.0 million). Top partners During the same period, imports from the second-ranked supplier, India, dropped from €21.5 million to €12.1 million (–43.7 %) and from Viet Nam from €8.3 million to €3.8 million (–54.2 %). The Herfindahl-Hirschman Index (HHI) for import value climbed from 6 315 to 6 874 (+8.8 %), confirming that EU sourcing has become even more concentrated around a single supplier. Concentration

A reshuffling of export destinations: Madagascar fades, Tunisia rises.

EU silk exports have historically targeted a mix of developing countries for processing and rich markets for final consumption. The most dramatic change has been the collapse of exports to Madagascar, which fell from €44.5 million to €14.7 million (–66.9 %). Top partners Conversely, Tunisia strengthened its position as a primary customer, with exports growing from €12.7 million to €23.5 million (+85.4 %), making it the leading destination by 2025. This shift likely mirrors the reorganisation of textile supply chains in the Mediterranean basin, where Tunisia has become a more attractive sourcing hub for European brands.

Traditional high-income markets and sanctioned partners have lost weight.

Exports to the United States contracted from €22.5 million to €12.3 million (–45.3 %), and shipments to the United Kingdom fell from €25.8 million to €11.7 million (–54.7 %). Top partners The Russian Federation, once a modest market for EU silk (€9.0 million in 2015), virtually disappeared after the imposition of sanctions, dropping to €2.3 million (–74.4 %). Combined with the decline in Morocco (from €14.2 million to €6.2 million, –56.2 %), these losses illustrate the multi-front pressure on the EU's export outlets, though the strong growth in Tunisia has partially compensated.

Export destination	2015 (€ million)	2025 (€ million)	Change (%)
Madagascar	44.5	14.7	–66.9
Tunisia	12.7	23.5	+85.4
United Kingdom	25.8	11.7	–54.7
United States	22.5	12.3	–45.3
Morocco	14.2	6.2	–56.2
Russian Federation	9.0	2.3	–74.4

Growing import dependency and market concentration: assessing risks in EU silk supply

Net import reliance has more than doubled, making the EU more vulnerable to external shocks.

The EU's net import reliance indicator—measuring the share of domestic consumption met by extra-EU imports—surged from 8.3 % in 2015 to 24.9 % in 2024, a jump of 198.9 %. Net import reliance This means that a quarter of EU silk demand now depends on non-EU suppliers, up from less than a tenth a decade earlier. Trade intensity (imports plus exports over value added) also rose from 46.5 % to 54.3 %, underscoring the sector's increasing embeddedness in global value chains. Trade intensity

A powerful price shock from China in 2022 revealed the fragility of a concentrated supply chain.

The data detect a significant price shock on Chinese imports centred in 2022, when unit values leapt 26.3 % above the 2020-2021 baseline while quantities recovered abruptly from the pandemic dip. Supply shocks Because China supplies the overwhelming majority of EU silk imports, such a price swing immediately feeds through to EU production costs. Despite the high visibility of this event, import price volatility from China remains relatively low (coefficient of variation 0.16), reflecting the consistency of the supply relationship;

secondary sources like Viet Nam or the Republic of Korea exhibit far higher instability (CVs of 0.48 and 0.55). Volatility

Export-side uncertainties compound the risks for EU producers.

On the export side, geopolitical tensions have injected severe instability into several formerly reliable markets. Shipments to the Russian Federation showed extreme quantity volatility (CV 0.51) before collapsing, and the United Kingdom also displayed high variability (CV 0.63). Volatility Moreover, export price shocks were detected for Belarus (+74.2 % in 2023), India (+248.7 % in 2021), and Morocco (+136.9 % in 2021), pointing to sudden, disruptive re-pricings that complicate long-term commercial planning. Supply shocks

Conclusion

The EU silk sector has undergone a pronounced transformation between 2015 and 2025. It has steadily moved away from simple re-export of woven fabrics and towards a more processing-intensive model, absorbing raw silk and silk-waste yarn while shrinking its fabric trade footprint. This restructuring, however, has been accompanied by a deepening dependence on China as a near-monopoly supplier and by the erosion of several traditional export markets, only partly offset by the rise of Tunisia. The doubling of net import reliance and the exposure to a 2022 Chinese price shock underline the vulnerabilities embedded in the current configuration. Looking ahead, the strategic challenge for EU industry will be to maintain its upmarket production specialisation while diversifying the sources of raw and semi-processed silk inputs and stabilising its destination markets.

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