EU TRADE EXPLORER

Market evolution: Special woven fabrics (CN 58) — 2015–2025

Introduction

This report examines the European Union's external trade in special woven fabrics, tufted textiles, lace, tapestries, trimmings and embroidery (CN 58) with non-EU partners over the period 2015–2025. Drawing on the full set of trade, production and volatility data from the Trade overview, the analysis identifies three core dynamics: a shrinking but still positive trade surplus driven by diverging price and volume trends; a profound reorientation of partner shares toward China and Mediterranean production hubs; and a gradual structural weakening of the EU's domestic production base that raises questions about long-term autonomy.

A Shrinking Trade Surplus Disguises a Sharp Quality Upgrade

The EU's trade balance in special fabrics contracted by almost two-thirds, as import growth outpaced exports.

The EU remained a net exporter throughout the decade, but its advantage narrowed considerably. The surplus fell from €158 million in 2015 to €58 million in 2025, a contraction of 63.6 % (see table 1). Exports rose only modestly (+3.1 %), while imports jumped by 16.8 %.

Table 1 – EU external trade in CN 58, 2015 vs 2025

Indicator	2015	2025	Change (%)
Exports (€ mn)	929.4	958.4	+3.1
Imports (€ mn)	771.3	900.7	+16.8
Trade balance (€ mn)	158.1	57.6	–63.6
Export volume (t)	54 402	47 904	–11.9
Import volume (t)	70 974	99 242	+39.8
Export unit price (€/t)	17 083	20 003	+17.1
Import unit price (€/t)	10 867	9 076	–16.5

Source: Trade overview

Export volumes fell while import volumes soared, yet unit prices moved in opposite directions, signalling a shift toward higher-value EU goods and cheaper foreign supply.

The volume gap is striking: the EU shipped 11.9 % fewer tonnes of special fabrics but received 39.8 % more. Meanwhile, the average export price climbed by 17.1 %, whereas the average import price dropped by 16.5 %. This divergence points to a repositioning where EU producers focus on higher-quality, pricier niches (e.g. embroidery, labels) while low-cost suppliers, particularly China, deliver ever larger quantities of mass-market fabrics.

The 2020 pandemic dented both flows, but the subsequent recovery diverged, with imports rebounding strongly and exports lagging.

The COVID-19 shock caused exports to fall to €766 million in 2020 (the lowest point) and imports to €653 million. After 2020, exports recovered but never regained the pre-pandemic growth momentum relative to imports. Import volumes, driven by Chinese shipments, reached a new peak of 99 242 t in 2025, while export volumes continued to drift downward.

China's Dominance and a Mediterranean Pivot Reshape Partner Landscape

China solidified its position as the top supplier, accounting for over half of extra-EU imports by 2025.

China's share surged, with imports rising from €305 million in 2015 to €461 million in 2025 (+51.0 %). In volume terms, Chinese deliveries more than doubled (from 35 128 t to 71 798 t). By the end of the period, China alone supplied more than half the non-EU imports of CN 58 goods, as shown in the Top partners.

Table 2 – Top import partners, 2015 vs 2025 (€ mn)

Partner	2015	2025	Change (%)
China	305.1	460.6	+51.0
Türkiye	116.0	110.7	–4.6
United Kingdom	100.5	62.3	–38.1
India	68.6	92.0	+34.2
United States	19.3	23.3	+21.1
Taiwan	25.2	14.2	–43.7
Brazil	6.3	4.8	–23.9

Source: Top partners

Post-Brexit, the United Kingdom's role diminished significantly, while near-shoring destinations Morocco and Tunisia drove export growth.

The UK, historically the leading export market, lost 33.9 % of its value, falling from €166 million to €109 million. Conversely, exports to Tunisia surged by 49.1 % (to €101 million) and to Morocco by 14.9 % (to €112 million). These two North African partners now rival the UK in export importance, reflecting a shift toward nearby textile-producing hubs that integrate into EU-led supply chains.

Table 3 – Top export partners, 2015 vs 2025 (€ mn)

Partner	2015	2025	Change (%)
United Kingdom	165.5	109.5	–33.9
Morocco	97.6	112.2	+14.9
Tunisia	67.5	100.6	+49.1
United States	83.7	88.6	+5.8
Türkiye	55.3	62.4	+12.8
Ukraine	27.5	29.9	+8.5
China	32.9	43.1	+30.7

Source: Top partners

Import concentration intensified markedly, whereas export markets became slightly more diversified.

The Herfindahl-Hirschman Index (HHI) for imports rose from 2 106 to 2 976, a jump of 41.3 %, underlining the bloc's growing reliance on China. Import volume concentration (HHI) rose even faster (+79.5 %). On the export side, the HHI fell by 12.1 %, suggesting that EU exporters spread their sales across a broader set of markets, thereby reducing single-buyer dependency (see Concentration (HHI)).

Production Erosion and Shock-Induced Vulnerability Test EU Autonomy

EU domestic production shrank by a quarter over the data horizon, eroding the region's net-export stance.

EU production volume of special woven fabrics contracted from 222.3 million kg in 2003 to 168.0 million kg in 2024, a decline of 24.4 %. In value terms, it fell from €4.3 billion to €3.2 billion (–25.6 %) (see EU production volumes). This shrinking industrial base directly contributed to the slide in the net-export-to-consumption ratio (net import reliance) from –

11.5 % in 2003 to only –3.4 % by 2024, meaning the EU is closer than ever to becoming a net importer.

Price shocks linked to the pandemic and global logistics disruption hit key suppliers and export markets, exposing the sector's fragility.

The Volatility overview and Price shock events reveal several notable disruptions:

- **Morocco (exports)**: A dramatic export-price drop of –54.4 % in 2021, linked to a surge in volume, was followed by price recovery, illustrating how EU producers used aggressive pricing to maintain market share during the pandemic.
- **United States (exports)**: A sharp export-price spike of +30.5 % occurred in 2023, reflecting strong demand for high-value EU fabrics despite lower volumes.
- **China (imports)**: Import prices jumped 23.3 % in 2022 amidst supply chain turmoil, before normalising as volumes continued to climb.
- **Türkiye (imports)**: A smaller but still significant price shock (+14.6 %) in 2022 underlined the globalised nature of inflationary pressures.

These events underline how sensitive trade flows are to external disruptions, even for a mature sector.

Rising export propensity and trade intensity indicate a more globally integrated sector, but the narrowing surplus signals growing external reliance.

Export propensity (the share of production sold extra-EU) climbed from 25.6 % in 2015 to 31.1 % in 2024, while trade intensity rose from 35.4 % to 46.1 % (see Net import reliance, Trade intensity, Export propensity). In principle, this shows that EU manufacturers are successfully competing abroad. However, because the trade balance has eroded and domestic production has contracted at the same time, the higher trade ratios mainly reflect a hand-over of lower-value production to non-EU suppliers, leaving the EU more dependent on imports for its total fabric consumption.

Conclusion

Between 2015 and 2025, the EU's special woven fabric trade underwent a fundamental transformation. A quality-upgrading push allowed EU exporters to raise unit values, but the surge in low-cost imports – overwhelmingly from China – reduced the trade surplus to a sliver. The partner map shifted decisively: China dominated import sourcing, while Mediterranean neighbours Morocco and Tunisia absorbed an increasing share of EU exports, partially compensating for the post-Brexit decline of the United Kingdom. Underpinning these trade flows, EU domestic production shrank steadily, eroding the bloc's net-export position and its industrial autonomy. The sector's vulnerability was laid bare by pandemic-era price shocks. Going forward, the combination of high export propensity and rising import concentration points to a double-edged integration: deeper global ties have boosted competitiveness in niche markets, but they have also made the EU's specialty-fabric supply chain more dependent on a small number of external suppliers.

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