EU TRADE EXPLORER

Market evolution: Sportswear (CN 6211) — 2015–2025

Introduction

The EU’s external trade in tracksuits, ski suits, swimwear and other non-knitted garments (CN 6211) underwent a profound transformation between 2015 and 2025. The most striking headline is the reversal of the trade balance: from a surplus of € 364 million in 2015 to a deficit of € 757 million in 2025. Beneath that shift, export volumes expanded while unit values halved, import sourcing diversified dramatically, and the product mix moved decisively towards lower-priced segments. This report interprets the decade-long dynamics using only the figures provided by the Trade Dashboard, broken down into three main findings.

A crumbling surplus: the paradox of booming volumes and collapsing unit values

The EU turned from a net exporter into a net importer, with the trade balance swinging by more than € 1.1 billion.

In 2015 extra-EU exports were worth € 1 902 million and imports € 1 538 million, yielding a positive balance of € 364 million. By 2025 exports had fallen to € 1 267 million (–33.4 %) while imports climbed to € 2 024 million (+31.6 %), pushing the balance to –€ 757 million. Trade overview

Export volumes surged by 37 % but unit values halved, pointing to a deep loss of pricing power.

The quantity of goods shipped abroad rose from 26 697 tonnes to 36 615 tonnes (+37.2 %), yet the average export price plummeted from € 71 251 per tonne to € 34 591 per tonne (–51.5 %). In contrast, import volumes grew more moderately (+12.6 %) while import prices increased by 16.8 % (from € 20 789/t to € 24 281/t). The EU is therefore selling far larger volumes at drastically lower unit values, while the goods it buys are becoming more expensive. This asymmetric development is the core explanation for the trade-balance collapse.

Indicator (extra-EU)	2015	2025	Change
Exports (€ m)	1 902.3	1 266.9	–33.4 %
Export quantity (t)	26 697	36 615	+37.2 %
Export price (€/t)	71 251	34 591	–51.5 %
Imports (€ m)	1 538.1	2 023.7	+31.6 %
Import quantity (t)	73 982	83 322	+12.6 %
Import price (€/t)	20 789	24 281	+16.8 %
Trade balance (€ m)	+364.2	–756.8	–307.8 %

The EU's export market concentration increased slightly, while import sources became more diversified.
The Herfindahl–Hirschman index for imports fell from 1 775 to 1 521 (–14.3 %), signalling a wider spread of supplying countries. Export HHI edged up from 678 to 762 (+12.4 %), indicating that a handful of destinations (notably Switzerland and the United Kingdom) gained relative importance. Concentration

Redrawing the sourcing map: China's resilience, near-shoring gains, and the Brexit rupture

Import diversification accelerated as Bangladesh, Türkiye and Vietnam gained ground, while the United Kingdom vanished as a supplier after Brexit.
China remained the largest foreign provider, delivering € 665 million in 2025 compared with € 575 million in 2015 (+15.5 %). However, its share faced competition from rapidly expanding suppliers:

- Bangladesh: € 45.8 million → € 162.3 million (+254.0 %)
- Türkiye: € 54.2 million → € 112.4 million (+107.2 %)
- Vietnam: € 70.9 million → € 110.6 million (+56.0 %)

Tunisia (€ 186 m → € 208 m, +11.8 %) and Morocco (€ 113 m → € 158 m, +39.8 %) also expanded steadily. India, by contrast, contracted slightly (–14.0 %).

The United Kingdom's role as an import partner collapsed from € 92.9 million in 2015 to € 33.5 million in 2025, a direct consequence of its departure from the single market. A marked price shock hit in 2021, when UK import unit values jumped 166 % as trade barriers were introduced, causing a lasting volume collapse. Top partners | Price shocks

On the export side, Switzerland and the UK rose to the top, while China and Russia collapsed as customers.
EU exports to Switzerland soared by 94.1 % (€ 100 m → € 195 m), while shipments to the

UK grew by 20.0 % (€ 143 m → € 172 m) despite a post-Brexit price-adjustment shock in 2021 that temporarily raised export unit values by 65 %. The United States remained broadly stable (–3.5 %).

The most dramatic declines occurred in markets affected by geopolitical tensions or shifting consumption:

- Exports to China fell from € 150 million to € 57 million (–61.6 %), after a brief but massive spike in 2021 (€ 321 million) linked to pandemic-related demand, followed by a sharp correction.
- Exports to Russia dropped from € 79 million to € 14 million, with a price shock in 2021 (–55.7 %) and severe volume contraction after the EU imposed sanctions.
- Conversely, Ukraine (€ 21.8 m → € 61.2 m, +180.7 %) and Georgia (€ 2.3 m → € 10.1 m, +339.0 %) emerged as fast-growing, albeit volatile, destinations.

Price shocks around Brexit, the war in Ukraine, and Chinese demand swings disrupted established trade patterns.
The data detects several abnormal price events. Imports from the United Kingdom suffered a 166 % price spike in 2021 as trade friction severed integrated supply chains. Exports to Russia experienced a 56 % price drop the same year as sanctions kicked in. China's 2023 export price quadrupled (+210.8 %) while volumes shrank by 87 %, indicating a withdrawal of EU firms from that market after the collapse of the 2021 bubble. Shock events

The hollowing out of high-value exports: a product-segment story

Women's and girls' garments of "other textile materials" dominated exports but lost two-thirds of their value as unit prices crashed.
The flagship export sub-category 621149 (women's/girls' garments of textile materials other than cotton or man-made fibres) fell from € 1 092 million in 2015 to € 367 million in 2025 (–66.4 %). Remarkably, the exported volume of this segment rose by 12 % (7 505 t → 8 407 t), meaning the entire value loss was driven by a 70 % collapse in the average unit price, from € 145 521 per tonne to € 43 667 per tonne. This points to a shift from luxury or specialised articles to much cheaper products within the same statistical code.

Export volumes surged in lower-priced cottons and man-made fibres, partially offsetting the high-value slump.
Several other product lines recorded strong volume growth, but at far lower unit values:

- Women's/girls' cotton garments (621142): quantity +142 %, value +27 %, price –48 % (€ 30 272/t → € 15 893/t)
- Men's/boys' cotton garments (621132): quantity +163 %, value +65 %, price –37 % (€ 34 785/t → € 21 819/t)
- Women's/girls' man-made fibre garments (621143): quantity +23 %, value –11 %, price –28 % (€ 39 780/t → € 28 686/t)

Men's/boys' man-made fibre garments (621133) and swimwear (621111) were the only export segments where unit prices rose (+27 % and +73 %, respectively), but they account for just 10 % and 5 % of total extra-EU export value in 2025. Product comparison

The import basket remained concentrated in affordable man-made fibre tracksuits, with swimwear segments posting the fastest growth.
On the import side, women's/girls' man-made fibre garments (621143) accounted for € 775 million in 2025 (38 % of total imports) and men's/boys' (621133) another € 420 million (21 %); both grew steadily at moderate price levels (€ 25 070/t and € 21 562/t). Cotton-based garments also expanded, but the most dynamic import increases occurred in swimwear: men's/boys' swimwear (621111) rose from € 100 million to € 168 million (+68 %) and women's/girls' swimwear (621112) from € 51 million to € 61 million (+20 %). These segments, together with the sharp rise of Bangladesh and Vietnam, confirm the EU's growing reliance on Asian production for basic sportswear items.

The contrast between export and import price trends underlines a structural move downmarket in EU external sales.
While overall import prices increased by 16.8 %, export prices halved. The composition of exports shifted toward products sold at less than € 30 000 per tonne, whereas the formerly dominant high-end "other textile materials" category has been hollowed out. This is not merely a cyclical effect but reflects a lasting repositioning of EU-based production towards cheaper segments or a loss of competitiveness in the premium niche.

Conclusion

The evidence from customs code 6211 reveals a European Union that, over the decade 2015–2025, turned from a net exporter of sportswear into a significant net importer. The deterioration of the trade balance was not driven by a slump in volumes—export tonnage actually rose—but by a dramatic loss of unit value, particularly in the formerly lucrative women's other-textile-materials segment. Meanwhile, imports grew in both quantity and price, with a more diversified supplier base and a pronounced pivot towards Bangladesh, Türkiye and Vietnam. Brexit and the sanctions on Russia triggered abrupt price shocks that permanently altered trade flows. The intra-EU specialisation data show that a few southern and eastern Member States retain a revealed comparative advantage, but the overall picture is one of a high-value export niche being hollowed out, leaving the EU increasingly dependent on imports for basic sportswear.

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