# Market evolution: Straw and plaiting manufactures (CN 46) — 2015–2025

## Introduction

The European Union's trade in manufactures of straw, esparto and other plaiting materials (CN 46) – comprising basketwork, wickerwork and plaits – underwent a remarkable transformation between 2015 and 2025. Over this period, extra-EU exports surged by 286.2 % in value (from €42.5 million to €164.1 million), while import value rose by 43.4 % (from €382.4 million to €548.3 million). The EU remained a consistent net importer, with the trade deficit widening from –€339.9 million to –€384.2 million, but the nature of both imports and exports fundamentally changed. This report examines the driving forces behind the export boom, the shift in import sourcing patterns, and the price volatility that punctuated the trade, drawing exclusively on the data and links provided.

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## 1. Export boom propelled by soaring basketwork unit values and the United States market

The ten-year growth in EU exports of CN 46 was dominated by finished basketwork and wickerwork articles (heading 4602), while the role of semi-finished plaits (heading 4601) remained small. The rapid rise in average export unit values, combined with explosive demand from the United States, transformed the trade landscape.

### Basketwork unit prices more than quadrupled, lifting total export value far ahead of volume growth

Export value expanded from €42.5 million in 2015 to €164.1 million in 2025 (+286.2 %), whereas quantity rose only from 9.3 thousand tonnes to 10.7 thousand tonnes (+16.0 %) (see General Overview). Nearly all of this value jump came from heading 4602 (basketwork, wickerwork, loofah articles). Exports of 4602 climbed from €30.1 million to €155.5 million, with its average unit price soaring from €4,459 per tonne to €22,651 per tonne (+408 %). In contrast, 4601 (plaits, mats, screens) unit prices remained between €4,000 and €6,000 per tonne, and the segment's export value barely changed (€11.8 million in 2015 to €15.8 million in 2025). The strong price trajectory of basketwork suggests a shift toward higher-value, design-intensive products or premium materials.

| Export Segment | Value 2015 (€ mn) | Value 2025 (€ mn) | Change (%) | Price per tonne 2015 (€) | Price per tonne 2025 (€) |
|---|---|---|---|---|---|
| 4602 – Basketwork & wickerwork | 30.1 | 155.5 | +416.6 % | 4,459 | 22,651 |
| 4601 – Plaits & mats | 11.8 | 15.8 | +34.5 % | 4,819 | 4,061 |
| *Source:* Product Segment Breakdown | | | | | |

### The United States became the top export destination, overtaking traditional European neighbours

Among extra-EU partners, the United States moved from a modest €1.4 million in 2015 to €37.4 million in 2025 (+2,494.7 %), surpassing the United Kingdom (€10.2 million to €23.9 million, +135.6 %) and Switzerland (€9.3 million to €17.3 million, +85.9 %) in value (see Top Partners). Türkiye also saw a notable increase (+705.8 %), while exports to Tunisia collapsed by –82.4 %, from €2.7 million to €0.5 million. The concentration of exports by destination fell (HHI from 1,308 to 1,054, –19.5 %), reflecting this broadening beyond Europe.

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## 2. Import diversification: Asia retains dominance but supplier base widens

Extra-EU imports of CN 46 remained far larger than exports, reaching €548.3 million in 2025. Although China preserved its position as the largest supplier, its relative weight declined, and a growing number of Asian and African origins expanded their shares, reducing concentration.

### Import value rises moderately, but the post-2021 recovery masks a mid-period spike

Imports grew from €382.4 million in 2015 to €548.3 million in 2025 (+43.4 %), with a peak of €796.1 million in 2022. Quantity increased by 33.0 %, from 111.9 thousand tonnes to 148.8 thousand tonnes. The average import unit price rose only 7.8 %, from €3,417 to €3,684 per tonne, but a sharp price increase occurred in 2022 (€4,963/t) linked to China, before retreating (see General Overview). This temporary price shock is analysed in the next section.

### New sourcing from Vietnam, Madagascar, Bangladesh, and India reduces reliance on China

China's import share – while still dominant – saw its value go from €253.8 million in 2015 to €288.9 million in 2025 (+13.8 %), far below the overall import growth. Concurrently, supplies from Vietnam jumped from €59.0 million to €101.1 million (+71.4 %), Indonesia from €28.4 million to €41.5 million (+46.2 %), Madagascar from €5.1 million to €36.7 million (+619.8 %), Bangladesh from €2.9 million to €22.4 million (+683.4 %), and India from €3.7 million to €17.3 million (+361.4 %). Ukraine saw an extraordinary rise from only €0.1 million to €2.6 million (+1,789.6 %). As a result, import market concentration (HHI) dropped from 4,708 to 3,262 (–30.7 %), an unambiguous sign of broadening supply chains (see Concentration).

| Import Partner | Value 2015 (€ mn) | Value 2025 (€ mn) | Change (%) |
|---|---|---|---|
| China | 253.8 | 288.9 | +13.8 % |
| Vietnam | 59.0 | 101.1 | +71.4 % |
| Indonesia | 28.4 | 41.5 | +46.2 % |
| Madagascar | 5.1 | 36.7 | +619.8 % |
| Bangladesh | 2.9 | 22.4 | +683.4 % |
| India | 3.7 | 17.3 | +361.4 % |
| Ukraine | 0.1 | 2.6 | +1,789.6 % |
| *Source:* Top Partners | | | |

### Import baskets remain dominated by finished basketwork, but semi-finished plaits play a secondary role

Under the same product split, imports of 4602 (basketwork, wickerwork) consistently accounted for the bulk – €446.7 million out of €548.3 million in 2025 – while 4601 (plaits, mats) contributed €94.2 million. In value terms, both segments grew modestly; the price of 4602 imports increased from €4,326/t to €5,283/t (+22 %), whereas 4601 import prices fell slightly from €1,762/t to €1,472/t (–16 %). Thus, the import side was less affected by the steep unit-value appreciation seen in exports.

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## 3. Price shocks and partner-level volatility reveal a market susceptible to rapid swings

Although trends appear steady in aggregate, the data uncover sharp price movements and highly volatile quantity flows from several suppliers and to several destinations.

### A price shock on imports from China in 2022 briefly pushed overall import unit values to a peak

A detected price shock on EU imports from China in 2022 saw the unit price jump by 45.4 % relative to the 2020-2021 baseline, from €3,098/t to €4,505/t, while quantity remained near its peak (abnormality 2.9) (see Shock Events). The price subsequently returned to near-baseline levels in 2023-2024, indicating a temporary supply-side disturbance. Because China accounted for 67.8 % of import value at the time, this shock drove the total import unit price to €4,963/t in 2022, the highest in the series.

### A price shock on exports to Türkiye in 2017 marked a lasting shift to higher unit values

For exports, a price shock was identified in shipments to Türkiye centred on 2017: the unit price jumped by 57.2 % compared to the 2015-2016 baseline (from €7,465/t to €11,738/t), and quantities expanded as well (from 115.5 tonnes to 189.8 tonnes). Post-shock prices stayed elevated, settling above €11,300/t, and by 2025 reached €14,259/t, contributing to the general upward trend in EU export unit values.

### High quantity volatility characterises several trading partners

Beyond price shocks, quantity flows were notably volatile (coefficient of variation >0.5) for imports from Ukraine (0.557), India (0.571), Bangladesh (0.478), Madagascar (0.401), and the United Kingdom (0.800). On the export side, high volatility was observed for Israel (0.607), Serbia (0.560), Türkiye (0.560), Ukraine (0.526), Tunisia (0.488), the Russian Federation (0.486), and the United States (0.401), underscoring the lumpy nature of demand and supply for these specialised goods (see Volatility).

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## Conclusion

Between 2015 and 2025, the EU’s extra-EU trade in CN 46 shifted decisively toward higher-value exports while import sources diversified and supply chains became less China-centric. Export growth was almost entirely driven by basketwork and wickerwork, whose unit prices quadrupled, and by surging US demand. Imports grew more steadily, with Vietnam, Madagascar, Bangladesh, and India seizing larger shares, cutting import concentration by nearly a third. Despite these structural changes, the market remains sensitive to price shocks, as illustrated by the 2022 import price spike from China and the 2017 export price jump to Türkiye. The combination of persistent trade deficit, a broadened partner base, and a premium product segment on the export side describes a dynamic but still net-import-dependent sector that is nonetheless upgrading its position in global value chains.

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