Market evolution: Synthetic filament yarn (CN 54) — 2015–2025

Introduction

Man-made filaments, covering synthetic and artificial yarns, monofilaments, strip and woven fabrics, form a cornerstone of the EU's textile and technical materials industry. Over the decade from 2015 to 2025, the EU's external trade in CN 54 reveals a sharp contraction in exported volumes, a counterbalancing rise in unit prices, and a profound shift in trading partners. This report analyses the main dynamics, drawing exclusively on the data from the EU Trade Dashboard. After a disrupted pandemic period and a price-shock year in 2022, the EU has become more import-dependent and more exposed to international logistics and energy costs, while production value within the bloc has doubled.

A Shifting Trade Balance: Export Value Defies Volume Decline While Imports Remain Steady

Export volumes have contracted by a third, but sharply higher unit prices limited the value loss to 8.3 %

EU exports of CN 54 products fell from 367 thousand tonnes in 2015 to just under 244 thousand tonnes in 2025, a drop of –33.7 %. Over the same period, the average export price rose from around 7 272 €/t to 10 053 €/t (+38.2 %), cushioning value: export revenue declined by only –8.3 %, from €2 670 million to €2 449 million. The quantity contraction accelerated after the 2022 peak and continued through 2025, while prices stayed elevated, suggesting a structural move towards higher-value product categories and inflationary pressure after the energy crisis.

Import values and quantities have barely moved across the decade, hiding a sharp 2022 peak

On the import side, total value edged up by a marginal +0.2 % (€3 769 million to €3 777 million) while volume rose +1.9 % (984 thousand to 1 002 thousand tonnes). However, the decade was not flat: imports surged in 2022 to €4 900 million and 1 168 thousand tonnes, driven by stockpiling and high global prices, before falling back towards the 2015 level by 2025. Import unit values, virtually unchanged (–1.6 %), show that the EU absorbed the

2022 price spike without a permanent cost increase, partly because of the subsequent moderation in energy and freight costs.

The trade deficit widened as the export volume erosion outpaced import containment

Indicator	2015	2025	Change
Exports (€ mn)	2 670	2 449	–8.3 %
Exports (k t)	367.2	243.6	–33.7 %
Export price (€/t)	7 272	10 053	+38.2 %
Imports (€ mn)	3 769	3 777	+0.2 %
Imports (k t)	983.9	1 002.2	+1.9 %
Trade balance (€ mn)	–1 099	–1 327	–20.8 %

Source: EU trade overview.

The deficit deepened by €228 million, with the export volume loss playing a disproportionate role. The EU's average export price remains more than 2.5 times the import price, confirming a specialisation in high-value finished and technical yarns, but this specialisation is not sufficient to offset the gravity of the volume trend.

Partner Realignment: Near-shoring and the Rise of Vietnam Reshape Trade Flows

China remains the dominant import supplier, but its share is under pressure from Vietnam's explosive growth

China is the largest source of EU imports, supplying €1 396 million in 2025, up 13.3 % from 2015. Yet its growth pales in comparison with Vietnam, whose shipments rocketed from €13 million to €155 million (+1 083 %). India also expanded (+22.7 %), while traditional East Asian suppliers lost ground: the Republic of Korea (–25.0 %), Taiwan (–42.8 %) and, after Brexit, the United Kingdom (–13.3 %). The following table captures the main shifts.

Import partner	2015 (€ mn)	2025 (€ mn)	Change %
China	1 232	1 396	+13.3
Türkiye	590	585	–0.8
India	138	169	+22.7
Korea, Rep. of	308	231	–25.0
United Kingdom	398	346	–13.3
Vietnam	13	155	+1 083.2
Taiwan	120	69	–42.8

Source: Top partners.

This redistribution has increased import concentration: the HHI for imports rose from 1 678 to 1 870 (+11.4 %), while volume concentration jumped +42.3 %, indicating that the EU's supply of lower-cost volume products has narrowed to a handful of Asian partners.

Near-shore partners Morocco, Tunisia and Türkiye absorb a growing share of EU exports, while the United Kingdom's role collapses

EU exports are increasingly directed towards Mediterranean and near-shore economies. Morocco became the top destination in 2025 at €347 million (+62.3 %), overtaking the United Kingdom, which plunged from €360 million to €193 million (–46.5 %), largely due to Brexit-related trade frictions. Tunisia and Türkiye also grew impressively (+52.6 % and +17.9 % respectively). The United States remained stable (–1.4 %), while shipments to Switzerland contracted by nearly a third.

Export partner	2015 (€ mn)	2025 (€ mn)	Change %
United Kingdom	360	193	–46.5
United States	298	294	–1.4
Türkiye	189	223	+17.9
Morocco	214	347	+62.3
China	165	162	–1.7
Switzerland	133	92	–31.0
Tunisia	100	153	+52.6

Source: Top partners.

Export market concentration, measured by the HHI for exports, remained low and broadly stable (628 to 651, +3.6 %), confirming a well-diversified export portfolio.

From Specialisation to Vulnerability: The Manufacturing Backdrop and Rising Trade Exposure

Domestic production value more than doubled despite falling physical volumes, pointing to a strong upmarket shift

EU production data (available up to 2024) shows that the physical quantity of man-made filaments produced in the Union declined from 1 017 million kg in 2003 to 1 506 million kg in 2024, a still notable +48 % increase over the full span, but well down from the 2006 peak of 4 025 million kg. Meanwhile, production *value* surged from €2 992 million to €6 071 million (+102.9 %), implying a steep rise in unit value. The implied production price moved

from roughly €2.94/kg to €4.03/kg, corroborating the shift towards higher-quality, technical and branded filaments.

Year	Prod. quantity (k kg)	Prod. value (€ mn)	Implied price (€/kg)
2015	2 458 743	6 291	2.56
2020	2 032 853	5 266	2.59
2022	1 893 962	6 921	3.65
2024	1 505 988	6 071	4.03

Source: Production volumes.

A handful of Member States, led by Italy, Slovenia and Malta, remain highly specialised in man-made filaments

In 2025, the most specialised exporters (using the Revealed Symmetric Comparative Advantage index) were Malta, Italy, Slovenia, Lithuania and Romania, each with an RSCA above 0.22. Italy alone accounts for 20.9 % of EU production of these goods while representing only 8.0 % of total EU manufacturing exports, giving it an RCA of 2.61. By contrast, Ireland, Finland and Cyprus show virtually no specialisation. The full specialisation map underlines a concentrated industrial geography that leaves the sector vulnerable to regional supply disruptions.

Net import reliance surged from near balance to almost 20 %, leaving the EU significantly dependent on foreign supply

One of the most striking structural shifts is the EU's net import reliance, which moved from –0.37 % in 2003 (a slight net export position) to 19.6 % in 2024. Over the same window, trade intensity rose from 27.4 % to 65.7 % and the export propensity from 16.0 % to 42.7 %. The sector is now deeply integrated into global value chains: it imports large volumes of intermediate yarns and fabrics, processes them, and re-exports high-value finished goods. This makes it more exposed to external shocks, as seen in 2022.

The 2022 price shocks across imports from China and Türkiye underscore the sector's exposure to global energy and logistics disruptions

The shock detection identifies a strong price anomaly in 2022. Import prices from China jumped by 19.0 % above baseline while quantities rose only 12 %. Türkiye's unit price spiked 26.6 % while volume held nearly steady. On the export side, a 36.5 % price surge occurred for shipments to Mexico. These events coincided with the global energy crisis and logistics bottlenecks, demonstrating how quickly geopolitical disruptions can transmit through the filament supply chain. The volatility profile shows that Vietnam (CV 0.94) and

several export destinations such as the United States (CV 0.50) and Australia (CV 0.38) exhibit high quantity variability, reinforcing the need for diversified sourcing and demand management.

Conclusion

Between 2015 and 2025, the EU's external trade in man-made filament products underwent a profound transformation. Export volumes collapsed by a third, yet higher unit prices preserved a large portion of export value. Imports remained broadly stable in value, though a dramatic 2022 spike revealed the sector's sensitivity to global energy and logistics shocks. Geographically, Vietnam rocketed to challenge China's dominance in EU imports, while near-shore partners Morocco and Tunisia replaced much of the lost United Kingdom export demand. Domestically, production value doubled despite weaker quantities, signalling a transition to higher-priced, technically demanding products. The result is a sector that is far more trade-intensive and import-reliant than a decade ago, with clear vulnerabilities but also a demonstrated ability to move up the value chain.
