Market evolution: Textile articles and sets (CN 63) — 2015–2025

Introduction

Chapter 63 of the Combined Nomenclature covers a broad basket of finished textile goods, from bedlinen and curtains to sacks, worn clothing and rags. This report examines the European Union's extra-EU trade in those products between 2015 and 2025. It highlights a persistent deterioration of the trade balance, the central role of a handful of Asian suppliers, the disruptive price spike in 2020 and its lasting effects, and the mounting trade dependence of an otherwise stable domestic production base. All figures are drawn exclusively from the EU trade dashboard.

A deepening trade deficit driven by surging Asian imports

The import bill grew by nearly half while exports advanced only modestly

Between 2015 and 2025 the value of exports rose from EUR 3.4 billion to EUR 3.8 billion (+11.6 %), whereas imports jumped from EUR 8.2 billion to EUR 12.2 billion (+49.1 %) (trade overview). In volume terms the contrast is even starker: export quantities increased by 22.0 %, import quantities by 47.8 %. Consequently the trade deficit widened from –EUR 4.8 billion to –EUR 8.4 billion (–75.6 %).

China, Pakistan, India and Viet Nam powered the import surge

Four Asian suppliers account for the great majority of the extra import bill.
Top partner values show:

Partner	2015 (EUR bn)	2025 (EUR bn)	Change
China	3.20	5.08	+58.9 %
Pakistan	1.03	2.23	+117.9 %
India	0.84	1.24	+47.5 %
Viet Nam	0.17	0.35	+105.0 %
Bangladesh	0.27	0.38	+44.6 %
Türkiye	1.05	1.03	–2.3 %

Türkiye, the only major partner with a stable or slightly declining value, lost relative importance while Pakistan and Viet Nam more than doubled their sales. The import-side concentration (HHI) rose from 2 025 to 2 329, interrupted only by an extreme outlier in 2020 (concentration HHI).

Export growth concentrated on a few non-European destinations

EU exports of CN 63 goods are much more diversified. The largest customer, the United Kingdom, saw sales drop from EUR 539 million to EUR 445 million (–17.4 %), partially offset by gains to the United Arab Emirates (+24.9 %), India (+21.9 %) and Pakistan (+38.3 %). Exports to Cameroon (−25.2 %) and Tunisia (−11.4 %) shrank. Overall the export HHI remained low, around 660–680, indicating no single destination dominates (top partners).

The COVID-19 shock and its lasting distortions

A one-off import price explosion in 2020, led by China

The year 2020 saw the strongest disruption of the decade. The import unit price from China rocketed by 375 % compared with the 2018-2019 baseline, lifting the total import price index to EUR 13 453 per tonne – almost three times the average of any other year (volatility events). The shock was entirely concentrated in sub-heading 6307 (made-up textile articles n.e.s., including protective face masks), where import value surged from EUR 2.4 billion in 2019 to EUR 22.96 billion in 2020, then fell back to EUR 5.4 billion in 2021 (product segment).

Other price shocks propagated through the supply chain

Several smaller but still notable price dislocations followed. Imports from Pakistan experienced a 25.7 % price lift in 2022, while imports from India saw an 11.8 % increase in the same year. On the export side, the UK unit price jumped 20.1 % in 2021 – the year Brexit trade barriers became effective – and the price of textile articles shipped to Ukraine leapt by 134.6 % in 2022 as the war disrupted logistics. These events are all flagged in the shock detection.

Volatility remains elevated for key trading relationships

The coefficient of variation (CV) of import quantities confirms that supply from Pakistan (CV = 0.255), China (0.177) and India (0.176) has been markedly more volatile than from Türkiye (0.108) or proximate partners such as Norway and Switzerland (both below 0.08).

On the export side, flows to the UAE (CV = 0.400), Russia (0.537) and Morocco (0.526) have been particularly erratic (volatility bars).

Resilient EU production, yet deepening external dependence

Domestic output has been remarkably stable

EU production of CN 63 articles reached 569 million articles in 2024, almost exactly the level of 2003 (576 million), and the production value was EUR 6.87 billion, up only 0.7 % over the same long span (production volumes). This flat trend shows that the sector has not been hollowed out, despite the import boom.

Specialisation is strongest in Central and Eastern Europe and in Portugal

In 2025 the EU members most specialised in CN 63, measured by the revealed symmetric comparative advantage (RSCA), are Portugal (0.50), Romania (0.32), Lithuania (0.32), Poland (0.27) and Bulgaria (0.22) (specialisation map). Poland alone accounts for 11.5 % of EU production of these goods, well above its general manufacturing share. Conversely, Ireland, Cyprus, Malta and Luxembourg show the lowest specialisation, reflecting their largely service-oriented economies.

Net import reliance and trade intensity have climbed steadily

The ratio of net imports to apparent consumption (net import reliance) rose from 44.5 % in 2015 to 51.8 % in 2024, peaking at 55.2 % in 2022 (net import reliance). Trade intensity (the sum of imports and exports relative to production) almost doubled from 16.8 % in 2003 to 73.6 % in 2024, and export propensity (exports to production) climbed from 5.3 % to 35.8 % over the same period (export propensity). The EU therefore sells a much larger share of its output abroad than it did a decade ago, but the import footprint has grown even faster, making the sector more vulnerable to supply disruptions from Asia.

What the product segments reveal

Imports are dominated by bedlinen, table linen and kitchen linen (CN 6302), which accounted for EUR 4.3 billion in 2025, followed by made-up articles (CN 6307, EUR 3.3 billion) and sacks and bags (CN 6305, EUR 1.2 billion). Export composition is quite different: worn clothing (CN 6309) leads in volume (1.28 million tonnes in 2025) but is a low-unit-value flow (EUR 0.63 per kg), whereas made-up articles (CN 6307) fetch EUR 16.8 per kg and generate the highest export value (EUR 1.08 billion) (product compare).

Conclusion

EU trade in textile articles and sets (CN 63) has been reshaped over the 2015-2025 period by two forces: a continuous import push from low-cost Asian suppliers, and the extraordinary COVID-19 price shock that briefly multiplied the import bill. While domestic production has remained stable and several Member States exhibit strong specialisation, the Union's net import reliance now exceeds 50 %, and trade intensity has more than doubled. The result is a structurally wider trade deficit and greater exposure to price and quantity disruptions, especially from China, Pakistan and India. Looking ahead, the challenge will be to balance the sector's proven export dynamism with a more resilient sourcing strategy, without sacrificing the cost advantages that have underpinned the post-pandemic recovery of imports.

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