Market evolution: Textile footwear (CN 6404) — 2015–2025

Introduction

Textile footwear (hs code 6404) – covering sports shoes, casual sneakers and indoor footwear with textile uppers – stands at the intersection of fashion, function and global supply-chain dynamics. Over the decade 2015-2025, EU trade in this category has been reshaped by several powerful forces: a sharp upgrading of export unit values, a rapid geographical diversification of suppliers, the disruptive effect of Brexit on traditional trade corridors, and a profound contraction of domestic production volumes. This report uses the complete yearly trade data provided to identify and explain these underlying dynamics, drawing exclusively on the dashboard figures.

Premiumisation drives value as physical volumes barely move

The EU's export price per unit more than doubled, while import unit values inched up by just 8 %

Between 2015 and 2025 the total value of EU exports of textile footwear rose by 124.5 %, from €1.43 bn to €3.21 bn, whereas the quantity exported increased by only 9.8 % (from 37.4 thousand units to 41.0 thousand units). The resulting export unit value soared from €38 240 to €78 194 – a jump of 104.5 %. On the import side, value grew 60.5 % (from €4.77 bn to €7.66 bn), but volumes expanded 48.8 %, from 333.0 thousand to 495.4 thousand units; consequently the import unit value edged up by only 7.9 % (from €14 330 to €15 458). The trade deficit therefore widened by one-third, from –€3.34 bn to –€4.45 bn.

Indicator	2015	2025	Change (%)
Exports (bn €)	1.43	3.21	+124.5
Imports (bn €)	4.77	7.66	+60.5
Trade balance (bn €)	–3.34	–4.45	–33.1
Export volume (thous. units)	37.4	41.0	+9.8
Import volume (thous. units)	333.0	495.4	+48.8
Export unit value (€/unit)	38 240	78 194	+104.5
Import unit value (€/unit)	14 330	15 458	+7.9

Source: Trade overview

Leather-soled-upper textile footwear (640420) fetches a huge premium and grows rapidly in exports

The product-segment breakdown reveals that the high-end sub-code 640420 (leather or composition leather outer soles) commands unit prices far above the rest. In exports, the unit value of 640420 stood at €118 878 in 2015 and reached €201 591 in 2025, roughly three times the price of standard rubber-soled footwear (640419) and two to three times that of sports footwear (640411). Export volumes of 640420 grew from 1.51 thousand to 2.39 thousand units (+58 %), and the export value surged from €0.18 bn to €0.48 bn (+170 %), contributing significantly to the overall export premiumisation. On the import side, 640420 remains a very small niche (1.79 thousand units) but its unit price also climbed, from €27 800 to €38 277.

Import volume expanded by nearly one-half, but export volume stagnated

The entire growth in physical trade has come from imports. Export volume barely increased over the decade, shifting from 37.4 thousand to 41.0 thousand units, despite the launch of high-value channels. Imports, by contrast, rose by 162.4 thousand units, driven almost entirely by the non-sports segment (640419), which added 149.6 thousand units (from 229.3 thousand to 378.9 thousand). Sports footwear (640411) imports grew modestly (+12.6 %). Hence, the volume-weighted average import price remained low, cementing the value-volume divergence.

From a China-dominated import base to a diversified Asian sourcing network

Viet Nam, Bangladesh and Myanmar erode China’s share of EU textile footwear imports

China remains the largest single supplier, but its import value rose only 8.2 % over the period (€2.47 bn to €2.67 bn), while several Asian competitors posted explosive growth.

Import partner	2015 (M€)	2025 (M€)	Change (%)
China	2 466	2 667	+8.2
Viet Nam	1 215	3 236	+166.4
Indonesia	391	606	+55.1
United Kingdom	278	111	–60.1
Cambodia	118	240	+103.6
Bangladesh	57	174	+204.5
Myanmar	5.7	117.9	+1 955.6

Source: Top partners by value

Viet Nam's imports more than doubled, reaching €3.24 bn in 2025 and overtaking China in some years; Bangladesh and Myanmar multiplied their shipments, reflecting the EU's "China+1" sourcing strategy and the impact of preferential trade schemes (EBA for Myanmar/Cambodia). The import Herfindahl-Hirschman Index (HHI) consequently fell from 3 468 to 3 114 (–10.2 %), indicating a moderately more diverse supplier base.

The United Kingdom's exit from the single market reshapes export flows

EU exports to the United Kingdom tumbled by 32.5 %, from €706 M in 2015 to €477 M in 2025. The sharpest contraction occurred after 2020; in 2021 export value to the UK dropped to €517 M from €1 329 M the year before. Meanwhile, other destinations absorbed the slack.

Export partner	2015 (M€)	2025 (M€)	Change (%)
United Kingdom	706	477	–32.5
Switzerland	121	537	+343.7
Türkiye	97	212	+118.6
United States	92	480	+419.8
Norway	42	151	+262.3
Russian Federation	50	87	+73.2
China	29	235	+704.0

Source: same as above.

Export market concentration collapses as the US, China and Switzerland become pivotal growth drivers

The export HHI plunged by 64.6 %, from 2 673 in 2015 to only 946 in 2025. This reflects the decline of the formerly dominant UK market and the rapid growth of shipments to the United States (+419.8 %), Switzerland (+343.7 %) and China (+704.0 %). The EU's export footprint has become far more balanced, with the “Others” segment (many smaller markets) accounting for €0.85 bn in 2025, up from €0.23 bn. This structural shift reduces vulnerability to any single market but also points to the global appeal of premium EU-branded textile footwear.

Domestic industry contracts while re-export hub role and import dependence intensify

EU production volume halves over the long term, but output value doubles

EU production of textile footwear (sold as final goods) dropped from 68.0 million units in 2015 to 65.2 million units in 2024 (–4.1 % over the decade, with a sharp interim fall and partial recovery). Over the whole available series (2003-2024) the volume shrank by 43.2 %. However, the value of production more than doubled, from €610 M in the early 2000s to €1 267 M in 2024 (+107.6 %), signalling aggressive upscaling and specialisation in high-price segments. The unit value of domestic production rose from €9.44 per unit in 2015 to €19.43 in 2024.

Source: Production volumes and Production value

Net import reliance and export propensity surge, exposing the sector to supply-chain price shocks

Net import reliance (the share of apparent consumption met by imports) climbed from 61.9 % in 2003 to 73.9 % in 2024, an increase of 19.3 %. Meanwhile, export propensity – exports expressed as a percentage of domestic production value – skyrocketed from 66.1 % to 243.7 % (+268.5 %), far above 100 % since 2015. This indicates the EU is now a net re-exporter of textile footwear: it imports large volumes, adds value through design, branding and logistics, and re-ships them worldwide. The combination of high import reliance and large re-exports makes the sector sensitive to disruptions in major supplying countries.

Source: Net import reliance, Export propensity

Post-pandemic price shocks from Indonesia and China underscore vulnerability

Two notable price-shock events were detected during the period:

- In 2022, imports from Indonesia experienced a price shock of +17.9 % relative to the 2020-2021 baseline, while the shipped quantity more than doubled (+162.8 % of baseline). The abnormality score was 44.8, indicating a highly unusual price-quantity combination, probably linked to post-COVID demand for footwear and temporary supply bottlenecks. Indonesia accounted for 10.4 % of total import value at that time.

- In 2023, a price shock of +13.5 % hit imports from China, as volumes contracted sharply to only 74.3 % of the 2021-2022 baseline. The abnormality was 3.6, and China supplied 50.2 % of EU imports by value, amplifying the ripple effects. Prices moderated only partially in 2024-2025.

Source: Shock events

These episodes illustrate the EU's exposure: although import sources are diversifying, the preponderance of key Asian suppliers and the high trade deficit mean that price spikes in large partners can quickly inflate import bills and test the resilience of just-in-time retail models.

Conclusion

Between 2015 and 2025, the EU's textile footwear market underwent a striking transformation. Export value more than doubled entirely through premiumisation, while import volumes swelled with relatively stable unit prices, deepening the trade deficit. The supplier map shifted decisively: Viet Nam, Bangladesh and Myanmar have become formidable alternatives to China, and the EU's export destinations are now much more balanced after the UK's post-Brexit slump. Domestically, production volumes have continued a long-term decline, but the value of output has risen sharply, reflecting a shift to high-end, design-intensive goods. The steep rise in import reliance and the emergence of price shocks from top suppliers highlight the need for continuous monitoring of supply-chain resilience, even as the EU consolidates its role as a global re-export hub for branded textile footwear.

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