Market evolution: Umbrellas and walking sticks (CN 66) — 2015–2025

Introduction

EU trade in umbrellas, walking sticks, whips and their parts (heading 66) is a small but notably imbalanced chapter of extra-EU commerce. Between 2015 and 2025 the bloc consistently ran a large deficit – imports were roughly six to eight times larger than exports – and the sourcing pattern remained overwhelmingly concentrated on a single supplier. This report examines the whole decade visible in the data, focusing on three pivotal dynamics: the persistence and price-shock of Chinese imports, the spectacular revival of EU domestic production and its effect on external reliance, and the reshaping of export destinations in the face of Brexit, war and new neighbourhood opportunities.

The persistent import deficit: China's grip and a 2022 price spike

Imports have grown faster than exports, widening an already deep trade gap

Over the eleven years the total value of extra-EU imports rose from €577 million to €701 million (+21.5 %), while exports moved from €89 million to €106 million (+18.2 %). Because the starting base was so uneven, the trade deficit swelled from –€488 million to –€595 million (–22.1 %). The average unit value of imports (€3 630 per tonne in 2015) barely changed (+1.4 %), whereas the export unit value jumped from €7 768 to €9 370 per tonne (+20.6 %), indicating a widening quality gap between the low-cost goods that arrive and the higher-value items shipped abroad. Trade headline figures

China remains the overwhelming supplier, accounting for nearly nine out of ten euros spent

Import concentration is extreme: the Herfindahl-Hirschman Index for import value stood at 7 833 in 2025, barely changed from 7 859 in 2015. China alone supplied €511 million in 2015 and €618 million in 2025, holding a share of around 88 % of all extra-EU umbrella imports throughout the period. The other top partners – Bosnia and Herzegovina, Cambodia, Türkiye, Viet Nam, Switzerland and Hong Kong – together account for less than 6 %

of the total. Bosnia and Herzegovina stands out with a spectacular rise (+369 %), yet its 2025 value of €16 million remains modest. Top import partners

A sharp price shock from China in 2022 tested EU buyers before conditions eased

The trade data detect a single supply-side shock on the import side: in 2022, the average unit price of Chinese imports surged by 26.1 % above the 2020-21 baseline, reaching €3 958 per tonne. The quantity also rose to a record 223 545 tonnes, and the combined effect pushed China's import value to an all-time high of €885 million. By 2023 the price had partially retreated and settled at €3 409 per tonne in 2025 – still slightly above the pre-shock average. This episode underlines the EU's complete exposure to Chinese pricing decisions. Price shock events

Production rebound and the shifting autonomy equation

EU output of umbrellas and walking sticks collapsed after the early 2010s but more than quadrupled after 2015

Domestic production – measured in pieces – hit a low of only 2.4 million units in 2015, a fraction of the 10 -13 million produced in the early 2000s. From that trough, output surged to 10.9 million in 2024 (latest available), a recovery that brought volumes close to the levels of two decades earlier. In value terms, production rose from a low of €114 million (2014) to €478 million in 2024, even though average unit prices fell. This V-shaped recovery suggests that a regional manufacturing base, largely in central and eastern Europe, managed to regain competitiveness after a severe contraction. Production volumes

The rise in domestic production nearly halved the EU's net import reliance from its 2015 peak

In 2015, when production was at its weakest, net import reliance – the share of apparent consumption met by net imports – stood at 77.0 %. By 2024 it had dropped to 51.0 %, the lowest reading since 2004. Trade intensity (imports + exports relative to production) similarly fell from 91.0 % to 62.1 % over the same horizon, indicating that the sector now relies more on EU-made goods and less on foreign flows. Net import reliance

Export propensity remains modest, but a handful of member states specialise in the sector

Despite the production recovery, the share of EU output sold outside the bloc (export propensity) stood at only 16.4 % in 2024, far below the 49 -57 % recorded in the early

2010s. The sector is therefore overwhelmingly domestic-market oriented. The specialisation indices for 2025 reveal a sharp divide: Croatia (RSCA 0.59), Greece (0.53), Austria (0.42), the Netherlands (0.20) and Poland (0.20) are the most specialised member states, whereas countries like Malta, Cyprus, Ireland and Estonia show virtually no presence. Specialisation map

Export landscape: Brexit steadiness, Alpine resilience, and geopolitical tremors

Exports to the United Kingdom remained remarkably stable despite the post-Brexit trade reset

The UK slipped from being the undisputed top market (€20.0 million in 2015) to the second position (€19.9 million in 2025), a mere –0.2 % change. Export volumes did contract (from 2 428 tonnes to 1 802 tonnes), but a rise in unit values compensated, leaving the sterling value largely intact. This stability contrasts with the collapse of UK-sourced imports into the EU (volumes down from 865 tonnes to 133 tonnes over the same period, a –85 % drop), pointing to a one-sided reorientation. Top export partners

Switzerland and Norway have cemented their roles as premium near-neighbour markets

Switzerland overtook the UK as the number-one export destination in value, growing from €17.4 million to €23.0 million (+31.9 %). Exports to Norway expanded even faster, from €3.7 million to €6.2 million (+68.5 %). Both markets absorb high-value items: export unit values to Switzerland and Norway are well above the average, reflecting demand for upper-segment umbrellas and walking sticks. The low volatility of Swiss-bound flows (coefficient of variation 0.10) underscores the stability of this trade.

Sanctions on Russia and a violent price collapse in Ukraine re-routed EU exports eastwards

Exports to Russia, which were worth €3.3 million in 2015, fell to €2.1 million in 2025 and volumes halved. The war in Ukraine caused a dramatic price shock: the average export price to Ukraine plummeted by 47.7 % in 2021 (shift centre) as low-priced emergency shipments jumped, before stabilizing at a higher level in 2024-25. Meanwhile, exports to Serbia experienced a sharp price spike of +65.8 % in 2023, driven by higher-value goods. These shocks illustrate how geopolitical disruptions can abruptly alter both the level and the composition of trade. Price shock events

Growing sales to the Western Balkans offer a diversification bright spot

Exports to Bosnia and Herzegovina jumped from €1.0 million to €3.0 million (+191 %), and to Serbia from €1.2 million to €2.5 million (+115 %). These small but fast-growing flows, together with rising imports from Bosnia (€3.3 million to €15.6 million), suggest a deepening production-network link with the region, possibly reflecting near-shoring of parts of the value chain.

Conclusion

Between 2015 and 2025, EU trade in heading 66 was defined by two opposing forces. On the import side, a near-total dependence on China persisted and was punctuated by a strong price shock in 2022, keeping the trade deficit wide and the sourcing concentration high. On the domestic front, a remarkable manufacturing rebound lifted production from its 2015 trough back to early-2000s volumes, halving net import reliance and restoring a degree of self-sufficiency. Exports, though still modest, held up well in traditional rich-country markets such as Switzerland, Norway and, despite Brexit, the United Kingdom, while geopolitical disruptions forced a re-routing away from Russia and towards the Western Balkans. The overall picture is one of a sector that remains externally exposed but is gradually rebuilding its own productive muscle and diversifying its customer base.

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