Market evolution: Women's clothing (CN 6204) — 2015–2025

Introduction

This report examines the European Union’s external trade in women’s woven clothing (customs code 6204) from 2015 to 2025. It covers suits, jackets, dresses, skirts, trousers and shorts made of non-knitted textiles, excluding wind-jackets, swimwear and underwear. Over the decade the sector’s external balance deteriorated sharply: while exports grew in value, they were outpaced by a surge in imports driven almost entirely by volume. The EU also reoriented its supplier base away from China towards South and Southeast Asia, re-directed exports from Russia and the United Kingdom towards high-income markets, and engineered a clear product-mix shift from volume to premium.

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1. A widening deficit fuelled by surging import volumes

Total imports grew by nearly 40 %, powered by a volume increase of almost 39 % while prices barely moved.

Between 2015 and 2025 extra-EU imports of CN 6204 rose from €8.93 billion to €12.48 billion, a rise of 39.8 % [Trade overview]. This expansion was overwhelmingly driven by physical quantities, which climbed from 387.8 thousand tonnes to 538.2 thousand tonnes (+38.8 %). The average import price remained virtually static, edging from €23 013/tonne to €23 180/tonne (+0.7 %).

Export growth was value-driven; volume contracted.

Extra-EU exports of the same products increased in value from €4.60 billion to €6.04 billion (+31.3 %). However, exported quantities fell from 68.7 thousand tonnes to 66.2 thousand tonnes (–3.6 %). The entire value gain therefore came from a 36.2 % jump in average export unit value (from €66 985/tonne to €91 221/tonne) [Trade overview].

The trade deficit deepened by almost 50 %.

As imports grew faster than exports in value, the EU’s net deficit widened from –€4.32 billion in 2015 to –€6.44 billion in 2025, an increase of 48.9 % [Trade overview].

Indicator (EUR, if not stated)	2015	2025	Change (%)
Extra-EU Imports (bn €)	8.93	12.48	+39.8
Import quantity (ktonnes)	387.8	538.2	+38.8
Import unit value (€/tonne)	23 013	23 180	+0.7
Extra-EU Exports (bn €)	4.60	6.04	+31.3
Export quantity (ktonnes)	68.7	66.2	–3.6
Export unit value (€/tonne)	66 985	91 221	+36.2
Trade balance (bn €)	–4.32	–6.44	–48.9

Data source: Trade overview

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2. Shifting geography: from China to South Asia and from Russia to high-income markets

Import sources diversified rapidly as China stagnated while Bangladesh, Cambodia and Pakistan soared.

China remained the largest extra-EU supplier, but its exports to the EU rose by only 7.8 % (€2.83 bn → €3.06 bn).

By contrast, imports from Bangladesh jumped 78.6 % (€1.14 bn → €2.03 bn), from Cambodia by 268.2 % (€0.23 bn → €0.83 bn), from Pakistan by 90.2 % (€0.29 bn → €0.55 bn), and from India by 56.1 % (€0.52 bn → €0.81 bn).

The overall import concentration (HHI) fell from 1 515 to 1 227 (–19.0 %), confirming a more diversified sourcing structure [Top partners – imports, Concentration HHI].

Extra-EU import partner	2015 (€ bn)	2025 (€ bn)	Growth (%)
China	2.83	3.06	+7.8
Bangladesh	1.14	2.03	+78.6
Türkiye	1.14	1.50	+32.2
Morocco	0.62	0.92	+49.1
Cambodia	0.23	0.83	+268.2
India	0.52	0.81	+56.1
Pakistan	0.29	0.55	+90.2

Data source: Top partners – imports

Export markets moved away from the UK and Russia, towards Switzerland, the US and Türkiye.

EU exports to the United Kingdom declined by 18.1 % (€1.04 bn → €0.85 bn), partly reflecting Brexit-related trade frictions. Shipments to Russia plummeted by 46.1 % (€0.46 bn → €0.25 bn) after sanctions.

Meanwhile exports to Switzerland grew 70.1 % (€0.53 bn → €0.91 bn), to the United States by 112.7 % (€0.46 bn → €0.99 bn), to Türkiye by 232.1 % (€0.11 bn → €0.36 bn) and to China by 80.0 % (€0.21 bn → €0.38 bn) [Top partners – exports]. Export market concentration fell modestly (HHI –10.9 %).

Extra-EU export partner	2015 (€ bn)	2025 (€ bn)	Growth (%)
United Kingdom	1.04	0.85	–18.1
Switzerland	0.53	0.91	+70.1
United States	0.46	0.99	+112.7
Russian Federation	0.46	0.25	–46.1
China	0.21	0.38	+80.0
Türkiye	0.11	0.36	+232.1

Data source: Top partners – exports

Within the EU, Spain became the top importer while Italy retained export leadership but Spain's exports collapsed.

Among EU Member States importing from outside the bloc, Spain's intake soared 59.6 % (€1.95 bn → €3.12 bn), overtaking Germany. Poland posted the most dramatic rise (+403.2 %, from €0.15 bn to €0.74 bn).

On the export side, Italy remained the largest extra-EU exporter (+18.5 %, €1.65 bn → €1.96 bn) but Spain's extra-EU exports fell by 33.2 % (€1.01 bn → €0.68 bn). Germany (+82.4 %), France (+97.8 %), the Netherlands (+254.7 %) and Poland (+556.5 %) all registered strong export growth [Top reporters].

EU Member State – Imports	2015 (€ bn)	2025 (€ bn)	Growth (%)
Spain	1.95	3.12	+59.6
Germany	1.89	2.29	+20.8
France	1.46	1.68	+15.0
Netherlands	1.00	1.56	+55.7
Italy	0.78	1.04	+34.4
Poland	0.15	0.74	+403.2

EU Member State – Exports	2015 (€ bn)	2025 (€ bn)	Growth (%)
Italy	1.65	1.96	+18.5
Spain	1.01	0.68	–33.2
Germany	0.55	1.01	+82.4
France	0.55	1.09	+97.8
Netherlands	0.10	0.34	+254.7
Poland	0.05	0.32	+556.5

Data source: Top reporters

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3. Premiumisation of exports versus commoditisation of imports

Import volumes surged for basic trousers while dresses saw price increases; export prices soared across all major segments.

At the sub-heading level (see Product segment breakdown), the import basket was dominated by cotton trousers (620462), whose quantity rose from 205 kt to 249 kt while the average import price fell from €19 096/tonne to €16 957/tonne. Synthetic-fibre dresses (620443) experienced a price rise from €32 937 to €39 696/tonne, whereas volumes remained broadly stable. Imported synthetic trousers (620463) more than doubled in volume, with nearly flat prices.

On the export side, price escalation was remarkable:

- Cotton trousers (620462): unit value from €42 149 to €48 392/tonne,
- Synthetic-fibre dresses (620443): from €50 521 to €87 000/tonne (+72 %),
- Synthetic-fibre trousers (620463): from €50 248 to €58 058/tonne,
- Artificial-fibre dresses (620444): from €102 908 to €123 673/tonne,
- Cotton dresses (620442): from €108 538 to €144 345/tonne.

Export quantities, however, declined or stagnated for most segments. The cotton trouser exports shrank from 25.4 kt to 22.4 kt, and synthetic-dress exports fell from 10.4 kt to 7.2 kt. This pattern confirms a deliberate shift from volume to higher-value, premium products [Product segment breakdown].

Multiple price shocks hit imports in 2022, and the US export market experienced an extreme price spike in 2023.

The year 2022 saw simultaneous price shocks on imports from India (+8.7 % average unit price), Bangladesh (+20.2 %), Pakistan (+15.8 %), Türkiye (+11.8 %) and Cambodia (+10.3 %), reflecting global supply-chain pressures and input cost inflation.

A particularly severe price shock occurred on EU exports to the United States in 2023, where the average price more than doubled (+113.6 %) while volume halved, clearly signalling a move towards ultra-premium product categories [Volatility & shocks].

Specialisation patterns reinforce the premium export narrative; member states with high revealed comparative advantage are mainly southern and eastern economies.

In 2025, the most specialised Member States in CN 6204 were Spain (RSCA 0.46), Poland (RSCA 0.42), Denmark (RSCA 0.38) and Italy (RSCA 0.20). Meanwhile, Ireland, Malta, Hungary and Finland showed very low specialisation, consistent with their limited role in this sector [Specialisation].

Conclusion

Between 2015 and 2025, the EU's external trade in women's woven clothing underwent a substantial transformation. Import dependency deepened as volume-driven purchases from South and Southeast Asia expanded rapidly, while the EU simultaneously shifted its own exports towards high-value, premium garments, reflected in soaring unit prices despite falling or stable volumes. The trade deficit widened considerably, and the geographic orientation changed markedly—away from China and Russia as major partners, towards Bangladesh, Cambodia, Switzerland and the United States. Price shocks in 2022 tested supply resilience, and the dramatic premiumisation of US-bound exports in 2023 underlined the EU's growing role as a niche player in high-end women's wear. Policymakers and businesses should monitor the ongoing concentration of imports from a narrower set of low-cost suppliers and the long-term viability of a high-price, lower-volume export strategy.

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If you need advice on European trade policy, or representation for your interests in Brussels, feel free to contact me at support@tradedashboard.eu. You can find my CV at this address.