Market evolution: Women's knitted garments (CN 6104) — 2015–2025

Introduction

This report examines the evolution of EU external trade in women's or girls' knitted garments (CN 6104) from 2015 to 2025. The product group covers suits, ensembles, jackets, blazers, dresses, skirts, trousers and shorts, but excludes items such as wind-jackets, underwear, tracksuits and swimwear. Over the eleven-year window, the EU's extra-EU trade in these garments expanded substantially, yet the import bill grew faster than export earnings, widening the trade deficit. This analysis identifies three central dynamics: a steep increase in import volumes accompanied by declining unit prices, a notable upgrade in export unit values and destination diversification, and a series of price shocks that reveal underlying supply volatility.

All figures are drawn from the EU Trade Dashboard for extra-EU trade.

Import volumes surge as prices decline, driving a widening trade deficit

Volume growth far outpaces value, compressing import unit prices

Extra-EU imports of CN 6104 rose from €4.7 billion in 2015 to €6.7 billion in 2025, an increase of 41.1 %. However, the volume growth was even steeper: import tonnage climbed 55.3 %, from 267 288 tonnes to 414 975 tonnes. The average import price therefore fell from €17 673 per tonne to €16 066 per tonne (–9.1 %). The import price reached its lowest point in 2022 at €15 671 per tonne. The combination of soaring volumes and depressed unit prices indicates fierce cost-competition among Asian suppliers and a shift towards lower-cost production bases.

Indicator	2015	2025	Change (%)
Import value (€ billion)	4.72	6.67	+41.1
Import quantity (tonnes)	267 288	414 975	+55.3
Import unit price (€/tonne)	17 673	16 066	–9.1

Asia's rising stars reshape the supplier landscape

China remained the largest supplier, with imports reaching €1.86 billion in 2025 (+22.9 % from 2015). Bangladesh closely followed at €1.42 billion (+93.7 %). Other partners recorded even sharper growth: Cambodia's deliveries surged 83.8 % to €704 million, Pakistan's soared 282.8 % to €256 million, and Myanmar's jumped 1 003.9 % to €159 million. Türkiye and India grew more modestly (4.0 % and 4.6 % respectively). The import supplier concentration (HHI) edged down from 1 621 to 1 559, pointing to a modest diversification of supply sources. Detailed data are available under top partners.

Import partner	2015 (€ million)	2025 (€ million)	Change (%)
China	1 511	1 857	+22.9
Bangladesh	734	1 421	+93.7
Türkiye	672	699	+4.0
Cambodia	383	704	+83.8
India	298	312	+4.6
Pakistan	67	256	+282.8
Myanmar	14	159	+1 003.9

The EU's internal gateways: Germany and Spain dominate, but Poland emerges

Looking at intra-EU dispatches (import flows recorded by member states), Germany handled €1.75 billion in 2025 (+28.6 %), Spain €1.12 billion (+93.2 %) and the Netherlands €893 million (+21.0 %). The most dynamic importer was Poland, whose intake mushroomed from €87 million to €461 million (+431.7 %), signalling a surge in re-exports or a growing role as a logistics hub for Central Europe. France and Italy also recorded solid increases. By contrast, Belgium's imports contracted by 38.7 %. The reporters' overview provides full detail.

Reporter (imports)	2015 (€ million)	2025 (€ million)	Change (%)
Germany	1 357	1 745	+28.6
Spain	578	1 116	+93.2
Netherlands	738	893	+21.0
France	605	683	+12.8
Italy	393	507	+28.8
Belgium	301	184	–38.7
Poland	87	461	+431.7

Export premiumisation and geographic rebalancing shield value growth

Robust unit price increases sustain export value despite modest volume gains

EU exports of CN 6104 rose from €1.29 billion in 2015 to €1.83 billion in 2025 (+42.5 %). In contrast to imports, the export volume expanded only 9.2 % (from 28 436 tonnes to 31 052 tonnes), meaning the average export price climbed from €45 214 per tonne to €58 991 per tonne (+30.5 %). The export price peaked at €69 370 per tonne in 2022. Thus, value growth was almost entirely driven by higher unit values, consistent with a move upmarket or a greater share of higher-priced items such as jackets and dresses.

Indicator	2015	2025	Change (%)
Export value (€ billion)	1.29	1.83	+42.5
Export quantity (tonnes)	28 436	31 052	+9.2
Export unit price (€/tonne)	45 214	58 991	+30.5

Post-Brexit and geopolitical pivots: Switzerland and the US overtake the UK and Russia

The destination pattern shifted markedly. Shipments to the United Kingdom, once the top export market, dropped 27.2 % to €285 million. Exports to Russia also declined 43.0 % to €61 million after sanctions. In their place, Switzerland emerged as the largest customer with €424 million (+154.4 %), while the United States rose to €212 million (+111.8 %). Exports to Türkiye grew an extraordinary 216.6 % to €116 million, and deliveries to China more than doubled (+157.1 %). Norway also added 86.1 %. These shifts are captured in the partners tab.

Export partner	2015 (€ million)	2025 (€ million)	Change (%)
United Kingdom	392	285	–27.2
Switzerland	167	424	+154.4
Russian Federation	108	61	–43.0
Türkiye	37	116	+216.6
United States	100	212	+111.8
Norway	47	87	+86.1
China	38	99	+157.1

Export concentration falls as new markets and EU-27 hubs expand

The export client base became considerably less concentrated: the HHI dropped from 1 316 in 2015 to 1 068 in 2025 (–18.8 %), as shown in the concentration tab. Among member states, Germany led export growth (+82.1 % to €479 million), followed by Italy (+62.8 % to €437 million) and France (+120.4 % to €247 million). Poland's export value multiplied nearly six-fold (+561.7 % to €154 million), while Spain recorded a decline of 29.6 % to €185 million. This suggests that Central European producers are gaining export orientation in this segment.

Reporter (exports)	2015 (€ million)	2025 (€ million)	Change (%)
Germany	263	479	+82.1
Italy	269	437	+62.8
Spain	263	185	–29.6
France	112	247	+120.4
Netherlands	67	67	+0.4
Poland	23	154	+561.7
Sweden	38	67	+77.8

Price shocks and supply volatility expose structural vulnerabilities

Sudden import price spikes in 2022 from Bangladesh and Cambodia

The volatility analysis identifies several price-driven shocks. Imports from Bangladesh experienced a 29.6 % price surge centred on 2022, with the unit price leaping from a 2020-21 baseline of €11 764/tonne to €15 250/tonne, before partially retreating. Cambodia recorded a simultaneous 17.2 % price shock. Despite these spikes, both sources remain among the most volatile, with coefficients of variation (CV) of 0.24 and 0.26 respectively. Pakistan (CV 0.43) and Myanmar (CV 0.56) exhibited even higher quantity volatility, reflecting the fragile nature of the supply base. The full volatility bars are available here.

Import source	Coefficient of variation (quantity)
Bangladesh	0.24
China	0.15
Cambodia	0.26
Pakistan	0.43
Myanmar	0.56
United Kingdom	0.67

Export price anomalies: the Swiss and Norwegian surges of 2017, and the US luxury shift

On the export side, the most extreme price shock occurred for the United States in 2023, where the average price jumped 156.7 % above the 2021-22 baseline, reaching €200 517/tonne, while volumes halved. This suggests a shift towards luxury or very high-end items. Switzerland recorded a distinct price shock in 2017 (+28.0 %) that persisted in subsequent years, and Norway experienced a 15.7 % price increase in the same year. These events are described in the shock events section. The high volatility of exports to Türkiye (CV 0.49) and China (CV 0.50) underscores the uneven pace of market development.

Export destination	Shock type	Period	Price shift
Switzerland	Price shock	2017	+28.0 %
Norway	Price shock	2017	+15.7 %
United States	Price shock	2023	+156.7 %

Specialisation patterns underline Central Europe’s growing role

By 2025, the most specialised EU exporters in CN 6104 were Croatia (RSCA 0.42), Poland (0.36), Denmark (0.32), Spain (0.30) and Portugal (0.14). In contrast, Malta, Ireland, Finland and Estonia display strongly negative specialisation scores, indicating minimal relative engagement in this product category. The specialisation map confirms that the industry’s export strength is clustering in certain central, southern and Baltic states, often those with lower labour costs or growing apparel-manufacturing clusters, while higher-cost economies remain net importers.

Conclusion

Between 2015 and 2025, the EU’s trade in women’s knitted garments exhibited strong expansion, yet with stark asymmetries. Imports swelled by 55 % in volume, driven by increasingly competitive Asian suppliers, but falling unit prices limited the import-value rise to 41 % and deepened the trade deficit. Exports, by contrast, grew primarily through price improvements (+30 %), fuelled by a reorientation towards higher-value markets such as Switzerland and the United States and away from the UK and Russia. The concentration of both import sources and export destinations declined, adding resilience. However, sharp price shocks, particularly from Bangladesh, Cambodia and the US, highlight lingering vulnerabilities. The emergence of Poland and other Central European states as import gateways and export hubs signals a restructuring of the EU’s internal supply chain that will likely continue to influence the market in the coming years.

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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.