Market evolution: Womens outerwear (CN 6202) — 2015–2025

Introduction

Between 2015 and 2025, EU trade in women's non-knitted outerwear (CN 6202) underwent a notable transformation. Extra-EU exports more than doubled in value, while imports grew more modestly, shrinking the trade deficit from €-2.21 billion to €-1.38 billion. Behind these headline figures lies a reconfiguration of sourcing patterns, a premiumisation of EU exports, and a set of structural shifts in the bloc's own production geography. This report analyses the main dynamics on the basis of the available annual data, highlighting three central themes.

Import diversification and the rebalancing of sourcing away from China

The EU's import portfolio for CN 6202 became substantially less concentrated over the decade, as new Asian suppliers expanded and the United Kingdom exited the single market.

China's declining share and the rise of new Asian suppliers

Imports from China, still the largest source, fell from €2.40 billion to €2.00 billion (–16.6 %), while the overall import market grew slightly. In parallel, several other Asian economies recorded explosive increases. Shipments from Myanmar, beginning from a low base, surged by 670.2 %; Bangladeshi imports rose by 206.2 % to reach €426 million; and Cambodian deliveries climbed by nearly twenty-fold (+1 954.1 %), reaching €250 million in 2025. Vietnam and Morocco also registered solid gains (see Table 1). As a result, the Herfindahl-Hirschman Index for import value declined from 4 779 to 2 623, a drop of 45.1 %, confirming a genuine diversification. Top partners by value

Table 1 – Top extra-EU import partners for CN 6202 (value, EUR)

Partner	2015	2025	Change (%)
China	2 402 529 814	2 004 732 233	–16.6
Myanmar	43 169 125	332 508 710	+670.2
Bangladesh	139 142 582	426 076 786	+206.2
Viet Nam	259 571 009	414 477 836	+59.7
Cambodia	12 168 360	249 951 180	+1 954.1
Morocco	132 579 667	165 759 136	+25.0
United Kingdom	186 334 311	82 452 283	–55.8

The post-Brexit collapse in UK imports

The United Kingdom's role as a supplier collapsed after 2020, with import value falling from €220 million (2019) to €82 million (2025), a decline of 55.8 %. Quantities contracted even more dramatically, underlining the trade-disrupting effect of the UK's departure from the EU customs union.

Diversification as a structural trend

The falling HHI, together with the emergence of Myanmar, Bangladesh and Cambodia as major origins, illustrates a structural rebalancing of the EU's outerwear sourcing away from a single dominant partner and towards a more resilient, multi-country supply base.

Export growth driven by premiumisation and new market opportunities

EU exports of CN 6202 grew by 114 % in value, reaching €2.82 billion, despite only a 40 % increase in tonnage. The difference is explained by a 52.4 % rise in the average export price, which rose from €76 737/tonne to €116 915/tonne. Trade overview

Switzerland and the United States drive export growth

Switzerland (+172.0 %) and the United States (+93.6 %) were the two largest destination markets by absolute growth, together absorbing €762 million of EU exports in 2025. Exports to Switzerland climbed steadily, reaching €442 million, while the US overtook the UK as the second-largest outlet, reaching €321 million. Top partners by value

The Italian and French export surge

Among EU member states, Italy cemented its position as the dominant exporter, more than doubling its foreign sales from €597 million to €1 411 million (+136.6 %). France (+280.3 %), Germany (+88.6 %), the Netherlands (+153.8 %) and Poland (+600.9 %) all re-gistered a vigorous expansion, while Spain remained essentially flat (+1.4 %). The export

HHI fell from 1 256 to 957, indicating that exports are also becoming less concentrated. Top reporters

Premiumisation: rising unit values across all material categories

The product-segment breakdown for the most recent years shows that export prices rose across the four main materials. Wool garments (CN 620220) commanded the highest unit value, averaging €261 401/tonne in 2025, up from €221 585 in 2022. Even man-made fibre coats (CN 620240), the largest export segment by volume, rose from €86 667/tonne to €115 150/tonne. This upward price trajectory contrasts with the flat or declining import prices and points to a successful positioning of EU outerwear in higher-value market niches. Product compare

Specialisation, shocks, and the resilience of EU production

The spatial pattern of specialisation and the supply-side shocks that affected the market reveal which parts of the EU production system are most exposed and which have proved resilient.

Southern and eastern EU members lead in outerwear specialisation

In 2025 the most specialised member states, measured by the Revealed Symmetric Comparative Advantage (RSCA), were Denmark (0.40), Poland (0.37), Spain (0.32), Italy (0.32) and Romania (0.26). These economies have an export basket in which CN 6202 is disproportionately present, while countries such as Malta, Ireland and Hungary display a strongly negative specialisation. Most/least specialised reporters

Man-made fibres dominate imports, while wool commands the highest export prices

Imports are overwhelmingly made of man-made fibres (CN 620240), which accounted for 152 000 tonnes in 2025, against 18 900 tonnes for cotton and 7 600 tonnes for wool. Import unit values are low and relatively flat: €21 665/tonne for man-made fibres in 2025, and €24 281/tonne for cotton. Export unit values, by contrast, reach €126 964/tonne for cotton garments and €261 401/tonne for wool items, illustrating the value-added gap between imported and exported outerwear. Product compare

Supply chain turbulence: the 2022 Bangladesh price shock

A significant price shock was detected in imports from Bangladesh in 2022, with unit prices jumping by 28.2 % relative to the 2020-2021 baseline, even as volumes remained close to trend (abnormality score 11.7). Bangladesh accounted for 9.4 % of import value that year, so the shock had a material impact. A smaller export-side price shock affected North Macedonia in the same year. The volatility profiles confirm that the outerwear supply chain has been subject to sharp, localised disruptions, while the low coefficient of variation of major partners such as China (0.17) and the United States (0.16) indicates that the core trade relationships remained relatively stable. Shocks & volatility

Conclusion

The EU's market for CN 6202 over 2015-2025 was marked by three reinforcing trends: a geographically diversified import base that reduced reliance on China, a sharp increase in the value and unit price of EU exports reflecting successful premiumisation, and a production structure concentrated in a handful of southern and eastern member states. These dynamics have narrowed the trade deficit, exposed vulnerabilities in the supply chain (most visibly the 2022 Bangladesh price shock), and underlined the importance of high-value segments such as wool coats for the EU's competitive position. Looking ahead, the continued growth of Asian low-cost suppliers and the impact of geopolitical shifts in key export markets will be the forces to watch.

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