Market evolution: Wool and animal hair (CN 51) — 2015–2025

Introduction

The EU’s trade in wool, fine and coarse animal hair, and related yarns and woven fabrics (CN 51) underwent a significant transformation between 2015 and 2025. While total trade values contracted only moderately, the underlying dynamics reveal a dramatic fall in physical volumes, a persistent rise in unit prices, a sharp production decline within the EU, and a reshuffling of trading partners. The 2022 price spike marked a critical juncture, disrupting established patterns and accelerating some pre-existing trends. This report describes and interprets these movements using the full data provided, drawing on the Trade Dashboard for overall trade, partner and reporter breakdowns, volatility and shock profiles, and vulnerability indicators.

1. Shrinking volumes, climbing prices: the new normal for EU wool trade

The overarching story of the decade is a steep contraction in the physical quantity of wool and animal hair traded across EU borders, partially masked by steadily climbing unit values.

Export and import volumes fell by roughly a third, while total values dipped much less

Between 2015 and 2025, extra-EU exports of CN 51 goods decreased from 138 463 tonnes to 91 964 tonnes (–33.6%), and imports shrank from 162 664 tonnes to 116 474 tonnes (–28.4%). Despite these volume collapses, export value declined only by 13.7% (from €1.61 bn to €1.39 bn) and import value by 7.3% (from €1.49 bn to €1.38 bn). The trade surplus, once a comfortable €124 million in 2015, nearly evaporated to €12 million in 2025, with several interim years (notably 2022) moving into deficit.

Table 1: Aggregate extra-EU trade, 2015 vs. 2025

Flow	Indicator	2015	2025	Change (%)
Exports	Value (EUR)	1,609,891,866	1,389,998,215	–13.7
Exports	Quantity (tonnes)	138,463	91,964	–33.6
Exports	Price (EUR/kg)	11.63	15.11	+30.0
Imports	Value (EUR)	1,486,005,064	1,378,140,706	–7.3
Imports	Quantity (tonnes)	162,664	116,474	–28.4
Imports	Price (EUR/kg)	9.13	11.83	+29.5
Balance	Value (EUR)	123,886,802	11,857,509	–90.4

Source: General Overview

The unit-value rise was synchronous across imports and exports, suggesting a global price re-rating

Export prices rose from €11.63/kg to €15.11/kg (+30.0%) and import prices from €9.13/kg to €11.83/kg (+29.5%). This parallel increase, despite divergent product composition (exports dominated by woven fabrics, imports by raw and carded wool), points to sector-wide inflationary pressure and a shift towards higher-value segments rather than an isolated EU phenomenon.

2. The 2022 price spike and the reshaping of partner relationships

The year 2022 stands out as a period of extreme price turbulence that accelerated the reorientation of EU trade patterns, partly intertwined with the post-Brexit reclassification of the United Kingdom as a non-EU partner.

Import prices from key suppliers such as Australia and Argentina surged abruptly

The Volatility & Shocks analysis identifies abrupt price events in 2022. The import price from Australia jumped by 32% above its immediate pre-shock baseline, reaching €8.27/kg; Argentine import prices leapt by 26.5% to €9.92/kg. Australian import value had already been declining over the period (–33.0% from 2015 to 2025), and the price shock did not reverse the long-term volume retreat (tonnes fell from 24 311 to 14 773).

Export prices to India and Türkiye more than doubled in 2022, generating substantial value gains

On the export side, unit prices to India soared by 109.2% in 2022 (from a baseline of €1.39/kg to €2.91/kg) and to Türkiye by 83.5% (from €9.32/kg to €17.10/kg). The value share of these destinations was notable: Türkiye accounted for 18.6% of EU exports in that year. Combined with sustained demand, this drove impressive growth in export value to India (+70.6% over the full period) and to Morocco (+94.2%), both of which gained market share as traditional outlets faltered.

Table 2: Selected export destinations, 2015 vs. 2025 (million EUR)

Partner	2015	2025	Change (%)
China	235.3	206.6	–12.2
United Kingdom	214.8	119.6	–44.3
Türkiye	182.7	168.2	–8.0
India	16.8	28.6	+70.6
Morocco	58.4	113.5	+94.2
United States	109.6	72.4	–33.9
Hong Kong	177.3	75.0	–57.7

Source: Top Partners

Post-shock volumes remained subdued, locking in a lower-volume equilibrium

After the 2022 spike, many of the temporarily inflated prices partially retreated, but export and import quantities did not rebound to pre-pandemic levels. For instance, exports to the United Kingdom never recovered from the combined Brexit and pandemic shock (down 50.5% in volume from 30 883 tonnes to 15 282 tonnes), and Hong Kong volumes shrivelled by 69.9%. The EU's export destination concentration (HHI) fell from 805 to 679 over the period, indicating that trade is now spread more evenly among a larger set of partners, albeit on a smaller overall scale.

3. A contracting domestic base and rising external exposure

Beneath the trade flows, the EU's own production of wool and animal hair has contracted dramatically, amplifying the sector's reliance on external markets and making it more sensitive to global shocks.

EU production of wool and hair fell sharply, compounding the volume contraction in trade

According to Market Structure data, the EU's production volume declined from 308.2 million kg in 2015 to 252.5 million kg in 2024, a reduction of 18.1%, with an even larger drop in value from €2.77 bn to €2.85 bn? *Wait, note: production value actually went from 2.765bn EUR in 2015 to 2.851bn EUR in 2024, a +3.1% increase, while quantity fell*

18.1%, implying a significant rise in the unit value of EU-produced wool/hair. This domestic value-added shift mirrors the price trends observed in trade.

Trade intensity and export propensity surged, tightening the link between domestic output and global demand

The sector's trade intensity (the sum of exports and imports relative to apparent consumption) climbed from 44.6% in 2015 to 61.1% in 2024. Export propensity (exports/production) rose from 34.4% to 48.9%. While the EU remained a net exporter throughout (net import reliance stayed negative, moving from –18.9% to –21.2%), its surplus narrowed in absolute terms, making the market more reactive to global price volatility and supply disruptions.

Specialisation is highly concentrated in a few Member States, dominated by Italy

In 2025, the most specialised reporters in this product group were Bulgaria (RSCA 0.78), Lithuania (0.70), Italy (0.67), Romania (0.50) and Czechia (0.42). Italy alone accounted for 40.6% of the EU's combined import-export value under CN 51, while Germany, despite holding a 14.9% product share, showed a negative RSCA (–0.17). The specialisation map underscores that the adjustment pressures are not evenly distributed: Eastern European countries with a strong textile processing tradition remain deeply integrated, while most Western and Nordic Member States are far less specialised.

Conclusion

The EU's trade in wool and animal hair over 2015–2025 is a story of quantity contraction cushioned by price inflation. Extra-EU volumes fell by roughly a third, yet the rise in unit values limited the decline in trade values to single-figure percentages. The 2022 price shocks, coupled with the post-Brexit reclassification of the UK and structural shifts in global demand, redrew the map of trading partners: Hong Kong and the United Kingdom faded while Morocco and India gained prominence. Concurrently, a shrinking domestic production base pushed trade intensity and export propensity to new highs, exposing the sector more forcefully to global price movements. The result is a smaller, more expensive, and more externally dependent market, concentrated in a handful of central and eastern European processing hubs, with Italy as its undisputed anchor. Looking ahead, the sector's resilience will depend on its ability to maintain high unit values and to manage the volatility that comes with deeper integration into global supply chains.

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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.