Market evolution: Woven apparel and accessories (CN 62) — 2015–2025

Introduction

The customs code 62 covers *articles of apparel and clothing accessories, not knitted or crocheted*—a broad heading that encompasses woven outerwear, tailored suits, dresses, shirts, blouses, underwear, swimwear, gloves, ties and other made-up textile articles. This report examines the European Union's trade with non-EU partners in CN 62 from 2015 through 2025, using annual frequency data. Over the full decade, both imports and exports grew by 21.5 % in value, yet the underlying volume and price trends diverged markedly. The EU's import basket became more diversified, with several South and South-East Asian suppliers gaining prominence as China's share stabilised. At the same time, geopolitical events and post-pandemic supply shocks reshuffled export destinations and triggered temporary price spikes. The following three sections unpack these dynamics.

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1. Divergent volume trajectories drive a sharp increase in the EU's external unit value for exports

Overall trade value expanded evenly on both flows, but export volumes contracted while import volumes rose significantly

Over the observation window, the total value of EU exports of CN 62 increased from €17.3 billion to €21.0 billion (+21.5 %), and imports grew from €36.0 billion to €43.8 billion (+21.5 %). The trade deficit widened accordingly from –€18.7 billion to –€22.8 billion (Total trade – overview).

Indicator	Exports 2015	Exports 2025	Change	Imports 2015	Imports 2025	Change
EUR value (bn)	17.3	21.0	+21.5 %	36.0	43.8	+21.5 %
Quantity (k tonnes)	280.2	241.5	–13.8 %	1 647.4	1 922.5	+16.7 %
Unit price (EUR/kg)	61.8	87.1	+41.0 %	21.9	22.8	+4.1 %

The quantity side reveals starkly different stories: export tonnage shrank by 13.8 %, while import tonnage expanded by 16.7 %. Hence, the impressive export value growth was entirely driven by a large rise in the per-unit price.

The resulting price gap underscores a structural shift towards higher-value European apparel and cheaper imported goods

EU export unit prices climbed from €61.8/kg to €87.1/kg (+41.0 %), whereas import unit prices barely moved (€21.9/kg to €22.8/kg, +4.1 %). This suggests a progressive specialisation of EU manufacturers in premium, high-value woven garments, while the mass-market segment is increasingly supplied by lower-cost producers outside the EU. The export price jump was particularly pronounced in 2025 for categories such as men's overcoats (€149.9/kg) and women's overcoats (€116.9/kg), compared with import prices for the same items of just €23.2/kg and €23.0/kg respectively (Product segment breakdown).

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2. A poly-centric sourcing landscape emerges as China's role plateaus and new suppliers surge

Import concentration drops markedly as Bangladesh, Pakistan, Vietnam and Myanmar capture growing shares

China remained the EU's largest external supplier of woven apparel, but its import value barely changed (€13.4 bn in 2015 → €13.3 bn in 2025, –1.0 %), while other Asian sources expanded dramatically (Imports and exports by partner – top partners).

Import partner	2015 (EUR bn)	2025 (EUR bn)	Change (%)
China	13.4	13.3	–1.0
Bangladesh	4.6	7.7	+66.3
Türkiye	3.2	3.4	+8.2
Pakistan	1.1	1.9	+76.5
Viet Nam	1.7	2.5	+49.2
India	2.0	2.2	+12.0
Myanmar	0.3	1.3	+401.2

Consequently, the Herfindahl-Hirschman Index (HHI) for import value fell from 1 778 to 1 456 (–18.1 %), while the volume-based HHI dropped from 2 036 to 1 813 (–11.0 %), confirming that the EU's import basket became significantly less concentrated (Market concentration – HHI). The rapid rise of Myanmar (+401 %), Bangladesh (+66 %) and Pakistan (+77 %) signals a shift of labour-intensive woven apparel production towards low-cost countries, partly aided by preferential trade arrangements.

EU export reorientation away from the UK and Russia towards Switzerland, the US, China and Turkey reshapes trading relationships

On the export side, the United Kingdom dropped by 29.5 % (€3.7 bn → €2.6 bn), and the Russian Federation by 46.4 % (€1.2 bn → €0.7 bn). In contrast, sales to Switzerland grew by 61.8 % (€2.1 bn → €3.3 bn), to the United States by 49.2 % (€1.9 bn → €2.9 bn), to China by 125.6 % (€0.8 bn → €1.9 bn), and to Türkiye by 93.4 % (€0.5 bn → €1.0 bn). The export HHI declined from 921 to 817 (–11.3 %), underlining a broader geographical spread of EU exports.

Within the EU, Italy and Poland strengthen their export specialisation while Spain's woven apparel exports collapse

Among EU Member States, Italy remained the dominant exporter, its shipments rising from €6.5 bn to €8.1 bn (+25.1 %). Poland's exports exploded from €0.2 bn to €1.0 bn (+403.4 %), making it the sixth-largest EU exporter. Conversely, Spain's exports shrank from €2.7 bn to €1.7 bn (–35.8 %), and Belgium's from €1.9 bn to €1.3 bn (–33.1 %) (Imports and exports by Member State – top reporters). The specialisation analysis confirms this shift: in 2025, Denmark (RSCA 0.43), Poland (0.33), Spain (0.31), Italy (0.22) and Bulgaria (0.22) were the most specialised exporters of woven apparel, whereas Ireland (–0.91), Malta (–0.80) and Hungary (–0.73) showed the lowest comparative advantage (Specialisation by Member State). The pronounced decline in Spain's export value, despite its continued specialisation, points to a loss of market share in traditional Mediterranean-hub production, possibly due to competition from Poland and non-EU suppliers.

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3. Geopolitical ruptures and post-pandemic shocks disrupt trade flows and generate notable price volatility

Imports from Pakistan, Bangladesh and China experienced strong price shocks in 2022, reflecting post-COVID supply chain bottlenecks

The year 2022 was marked by abnormal import price spikes for several key suppliers (Price shock events):

- Pakistan: unit price +20.5 % above baseline (abnormality 11.3)
- Bangladesh: unit price +20.5 % above baseline (abnormality 6.2)
- China: unit price +18.8 % above baseline (abnormality 6.0)

All three shocks centred on 2022, coinciding with global logistics disruptions, elevated freight costs and tight inventories. Prices subsequently moderated but remained above pre-shock levels. On the export side, a sharp price shock (+61.4 %, abnormality 7.0) occurred in shipments to Canada in 2023, pushing the unit value from €87 k/t to €141 k/t, likely reflecting a shift towards very high-end niche products.

The United Kingdom's exit from the single market and EU sanctions on Russia permanently reduced export volumes to both destinations

The coefficient of variation (CV) for UK-bound export volumes over the whole period is 0.48, and for Russian exports it is 0.37, reflecting drastic permanent drops rather than normal fluctuations (Volatility of trade flows). After the UK's departure from the EU single market in 2021, export tonnage halved from 91 k tonnes (2019) to 41 k tonnes (2021) and never recovered. Russian volumes collapsed after 2022, falling from 25 k tonnes (2021) to 7.9 k tonnes in 2025. These disruptions were partially offset by gains in other markets, but the lost volumes remain sizeable.

Poland's astonishing 403 % export growth and Spain's 36 % drop illustrate a rebalancing of EU-wide woven apparel production

Poland's surge as a woven apparel exporter—from €0.2 bn to €1.0 bn—has been accompanied by a high export volume CV (0.28) for Türkiye (an important production partner), suggesting close ties with EU-based manufacturing and nearshoring strategies. At the same time, Spain's export drop of 36 % and the exit of some traditional players have concentrated EU production advantages in Italy, Poland and a few other member states, reshaping the internal geography of the sector.

Conclusion

EU trade in woven apparel (CN 62) evolved through a decade of consistent value growth, rising to €21 bn in exports and €44 bn in imports. The increase in exports was entirely driven by higher unit prices, whereas imports expanded in both volume and value, reflecting a deepening specialisation of the EU in premium garments and a growing reliance on affordable imports from Asia. The sourcing map underwent a quiet revolution: China's share plateaued while Bangladesh, Pakistan, Vietnam and Myanmar surged, cutting the import concentration index by 18 %. Exports were profoundly reshaped by the loss of the UK and Russian markets, while gains in Switzerland, the US, China and Turkey compensated only partially. Within the EU, Italy and Poland emerged as new export pillars, while Spain's role shrank dramatically. Finally, the 2022 price shocks highlight the sector's vulnerability to global supply chain disruptions, even as the overall trend points towards a more diversified and higher-value trade profile.

Generated on 2026-07-24 based on data from tradedashboard.eu

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