



## EU clothing imports down 15.7% in Q1 2021; textile imports up 10%

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Jean-François Limantour  
President of Evalliance

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The containment measures against Covid continued to severely impact the European apparel trade throughout the first quarter of 2021: sluggish clothing consumption, stores at a standstill, huge inventories, and falling foreign trade. Against this backdrop, EU apparel imports fell again by nearly 16% in Q1 after a 14% decline in 2020.

EU (27 members) clothing imports, 1st quarter 2021						
Rank	Suppliers	Value		Share in %		Price evolution
		euros	2021/2020	2020	2021	2021/2020
1	China	4 821 959 807	-6,0%	26,3%	29,3%	-1,5%
2	Bangladesh	3 163 540 755	-24,8%	21,5%	19,2%	-11,5%
3	Turkey	2 196 915 238	-2,8%	11,6%	13,3%	-11,2%
4	India	947 900 163	-18,8%	6,0%	5,8%	-9,4%
5	Vietnam	668 627 612	-13,8%	4,0%	4,1%	-6,1%
6	Pakistan	605 183 180	-14,8%	3,6%	3,7%	-5,3%
7	Morocco	539 078 033	-8,9%	3,0%	3,3%	-5,6%
8	Cambodia	534 916 154	-27,3%	3,8%	3,2%	-9,5%
9	Tunisia	470 684 468	-9,2%	2,7%	2,9%	-7,2%
10	Myanmar	425 340 747	-24,8%	2,9%	2,6%	-9,2%
11	Sri Lanka	285 426 814	-15,3%	1,7%	1,7%	2,7%
12	UK	220 657 971	-66,4%	3,4%	1,3%	6,7%
	Other	1 579 940 789	-15,6%	9,6%	9,6%	-4,3%
	All suppliers	16 460 171 731	-15,7%	100,0%	100,0%	-4,8%

Source: Eurostat Data processing: JF Limantour

Most of the EU's suppliers are suffering, but some less than others. This is the case for **China**, whose apparel sales to the EU are down only 6% and whose market share rose to 29.3% at the end of March. This is also the case of **Turkey**, which is down only 2.8% thanks to the devaluation of the pound. The two Mediterranean countries of the Maghreb, Morocco (-8.9%) and Tunisia (-9.2%) are doing better than resisting in this hostile economic environment. But beware, these "relatively" good results are only for the first three months of the year and should not make us forget their mediocre performance in 2020 (Tunisia: -15% and Morocco: -23%)

With the remarkable exception of China, Asian suppliers are not at the party: **Bangladesh** fell by 25%, **India** by 19%, **Vietnam** by 14%, **Pakistan** and **Sri Lanka** by 15%.

**Cambodia**, from which the European Union has partially withdrawn the "Everything But Arms" super-preferential regime, has seen its sales collapse by 27%. As for **Myanmar**, plunged into terrible internal problems, it has logically fallen by 25%, whereas it had been experiencing double-digit growth for several years.

As a consequence of the Brexit, the **United Kingdom** fell heavily by 66%.

Note also the poor performance of **Indonesia** (-25%).

**Imported clothing prices** are down 4.8% from their level at the end of March 2020, a development that reflects the very difficult situation of the European market.

**EU textile imports** reached 8.6 billion euros (+10.1% compared to Q1 2020).

As for clothing imports, **China** and **Turkey** have achieved the best scores in the first quarter of 2021 as suppliers of textiles (yarns, fabrics, linens, masks, ...) of the European Union.

**China's** performance is impressive: + 37% to reach 3.9 billion euros, one billion euros better than in the first quarter of 2020. Its sales of masks and other medical items alone are even up 163% to €1.8 billion!

Total Chinese textile exports now account for 46% of EU textile purchases, 10 percentage points higher than in Q1 2020.

Clearly, China continues to be the very big winner in Covid 19!!! And this not only in textiles but also in clothing.

**Turkey** consolidates its position as the second largest textile supplier to the EU with a 15% share for quarterly sales of 1.3 billion euros.

Followed, but by quite a distance, India, Pakistan, the **United Kingdom**, the **United States**, **Korea**, **Switzerland** and **Japan**.

Mediterranean textile suppliers (other than Turkey) occupy a modest place in the competition on the European market: **Egypt** (12th supplier), **Tunisia** (13th), **Israel** (16th) and **Morocco** (18th). They all show declines in their exports to Europe with the exception of Tunisia, which is progressing (+16%) thanks in particular to the significant sales of masks.

Jean-François Limantour  
President of Evalliance (<https://www.evalliance.eu>)

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