



European Union Nonwovens Market:

Where Are the Opportunities?

Import Trends, Supply Dynamics & Opportunities

| Euro-Shortcut | OCT 2026

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EU - European Union Market



Hygiene | Medical | Wipes | Automotive | Filtration | Construction | Industrial



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European Nonwovens Market: Where Are the Opportunities?

Import Trends, Supply Dynamics & Opportunities | Euro-Shortcut | OCT 2026

Key Takeaways

- In 2025, the EU imported 388,000 tons of nonwovens, valued at €1.8 billion.
- China was the top supplier, providing 148,000 tons of nonwovens.
- Key sectors for imported NW included hygiene, medical, automotive, filtration, construction, & industrial.
- The European Commission began an anti-dumping investigation into PET spunbond imports from China.
- Freight and geopolitical issues impacted Asian (CN) supply chains.
- Opportunities for EU suppliers, especially MEA suppliers, to replace Chinese imports to the EU.





European Union | Nonwovens Imports from the World | 2025

In 2025, the European Union remained a significant global market for nonwoven products, with imports from non-EU countries reached approximately 388,000 tons, with a total value of around €1.8 billion, increased by 8.6% compared with 2024, highlighting the continued importance of overseas supply to the European converting, hygiene, medical, filtration, construction and industrial sectors.

Import origins: China and Türkiye dominate

China was the leading external supplier of nonwovens to the European Union in 2025, supplying approximately 148,000 tons. Türkiye ranked second, with around 122,000 tons, while countries across the Middle East and Africa (MEA) collectively supplied approximately 41,000 tons. The United States remained another important source, supplying approximately 17,000 tons.



European Union | Nonwovens' Imports from World |

OCT 2026

2025

Statics



European Union's Imports

Volume

388K

Tons

Value

1.8

Billion Euro

USA



17K

Tons

Turkey



122K

Tons

China



148K

Tons

INDIA



8K

Tons

MEA

41K

Tons

Source : NEC Business Intelligence Center – Nonwovens



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The data highlight a relatively concentrated external supply structure, with China and Türkiye together accounting for roughly 87% of the combined volume supplied by China, Türkiye and MEA. China's position reflects its scale, broad product portfolio and cost competitiveness, while Türkiye's strong position is supported by its geographic proximity to Europe, shorter lead times and deep integration with European supply chains.

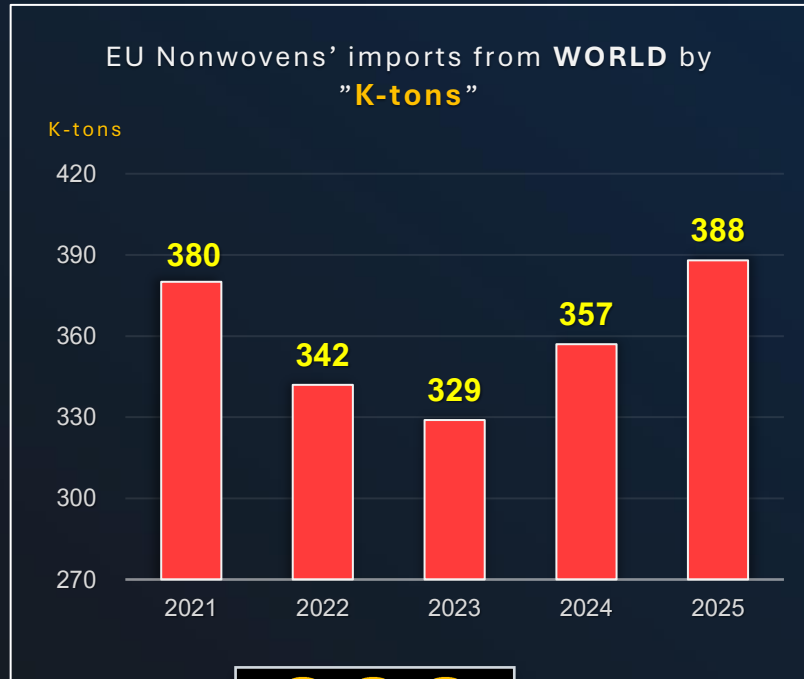
MEA remains smaller in absolute volume but represents an increasingly relevant alternative sourcing base. Its geographic proximity to Europe, particularly North Africa, Egypt & GCC , provides opportunities for shorter supply chains and diversification as European buyers seek to reduce dependence on the two dominant origins



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026

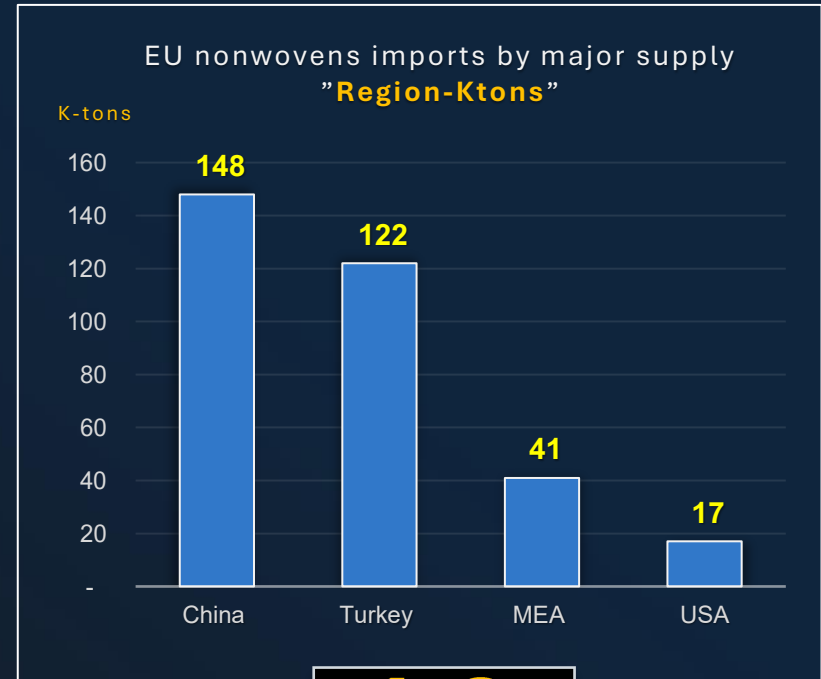


A Strategic Guide to Enter the EU Nonwovens Market ...



388
K-tons

EU Nonwovens' Imports
from World in 2025



1.8
billion-Euro

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Source : NEC Business Intelligence Center – Nonwovens





Importing countries: concentrated in Europe's major converting hubs

EU imports are also concentrated geographically. Germany, Italy and Poland together account for approximately 39% of EU nonwoven imports by value, while the Czech Republic, France, Belgium, the Netherlands, Spain, Romania and Sweden account for a further approximately 41%.

This concentration reflects the importance of Europe's major hygiene, medical, wipes, automotive, filtration, construction and industrial converting hubs. For suppliers, these markets should therefore be viewed not simply as end-user markets but as strategic entry points into wider European supply chains.



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026



Trade remedies is reshaping the competitive landscape

The competitive pressure from Asian suppliers, particularly China, has increasingly become a policy issue. In December 2025, the European Commission introduced registration requirements for certain PET spunbond nonwoven imports originating in China, following an EU trade-remedies investigation.

This development could materially affect sourcing decisions in applications such as roofing, filtration, wallcovering, automotive and geotextile substrates.

It is also likely to encourage greater scrutiny of customs classification, product specifications, origin and supply-chain traceability across the broader China-sourced nonwovens basket



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026



Market assessment

Overall, the 2025 trade landscape points to a growing but increasingly competitive EU nonwovens import market. Rising import volumes, combined with strong supply from China and Türkiye, indicate that European converters and downstream industries continue to rely significantly on international sourcing to meet demand and maintain cost competitiveness.

The competitive environment is therefore becoming increasingly differentiated: commodity grades remain highly price-driven, while technical performance, supply security, regulatory compliance and traceability are becoming more important in higher-value applications.



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026



Opportunities for EU suppliers, particularly (MEA suppliers) 1/2

a. Diversification away from China:

Suppliers in North Africa, KSA, Egypt, UAE & Jordan are well positioned to capture business from European buyers seeking alternatives to Chinese suppliers that can demonstrate consistent quality standards, reliable production capacity, and stable supply chains will have a competitive advantage.

b. Specialty and higher-value Nonwoven material:

Opportunities are emerging in PET spunbond, spunlace, wetlaid, airlaid and meltblown filtration media, where technical performance and product qualification are more important than lowest-cost supply.

c. Supply-security positioning:

European buyers are increasingly valuing reliability alongside price, shorter lead times, geographic proximity, flexible order sizes and the ability to-

Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026





Opportunities for EU suppliers, particularly (MEA suppliers) 2/2

-provide a credible second source can give Türkiye and North African suppliers an advantage over longer-distance Asian supply.

d. Dual sourcing should become a priority.

EU Importers and converters began to establish alternative origins before trade remedies measures, tariff changes or potential circumvention investigations materially affect landed costs.

e. Local value-added conversion.

Importing jumbo rolls and performing conversion within Europe remain attractive in applications such as wipes, medical products and filtration. However, companies should ensure that origin, tariff classification and customs documentation are managed correctly as scrutiny increases.



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026



The Conclusion 1/2

- The strategic outlook is not simply “China versus Europe,” but a move toward a more diversified European sourcing model. China remains a key supplier, while Türkiye offers a cost- and logistics-efficient alternative. The MEA region is emerging as an important sourcing hub, providing opportunities to diversify supply, improve cost competitiveness, and expand access to European markets. At the same time, EU producers are strengthening their position through technical expertise, compliance, quality, and Supply stability.
- 2025 was an important turning point for the European nonwovens market. While imports continued to grow, competition increased and trade policies had a greater impact and The EU is moving toward a more regulated market, with greater focus on compliance and product origin.



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026



The Conclusion 2/2

- Increasing regulatory requirements around recycled content, chemical composition, PFAS and product traceability combined with higher freight and energy costs and geopolitical risks, particularly affecting Asian supply chains.

NEC Recommendations

The strongest opportunities are likely to emerge for suppliers that can combine competitive pricing with qualification, supply reliability and regulatory compliance.

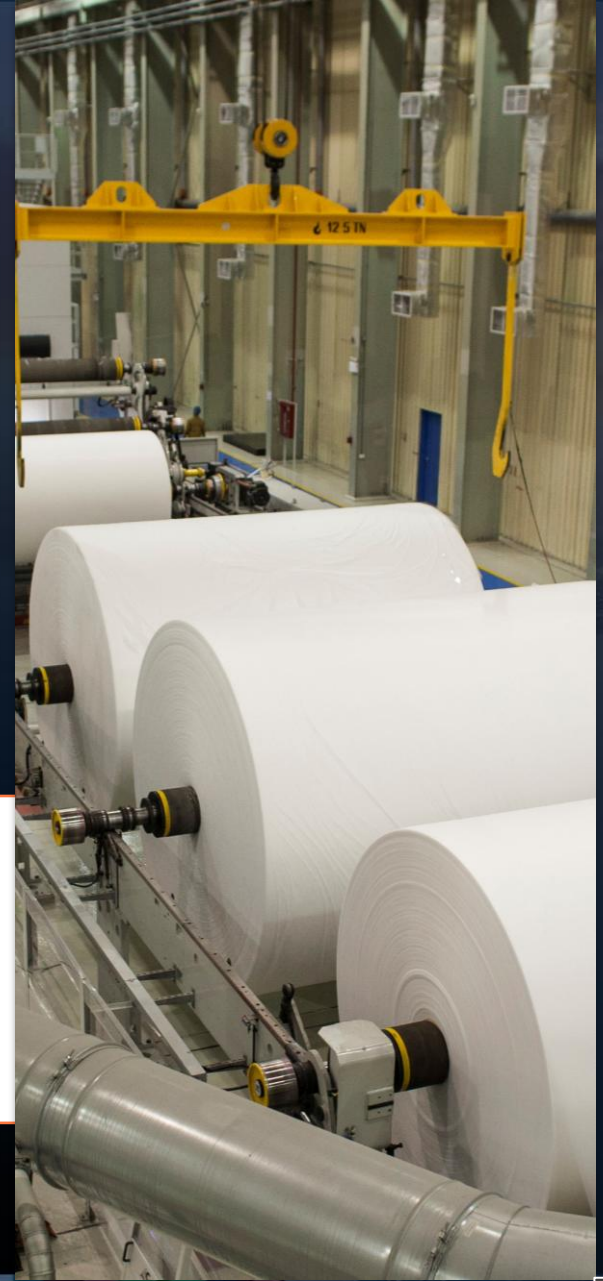
- For non-EU suppliers: (particularly in Türkiye and MEA) this creates an opportunity to position themselves as credible alternatives to Chinese supply.
- For EU producers: the changing trade environment provides an opportunity to convert greater protection into investment in specialty products, higher-value applications, sustainability and supply-chain resilience.



Source : NEC Business Intelligence Center – |Euro-Shortcut| OCT 2026

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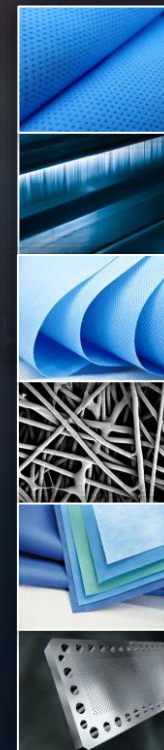


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