Monthly Report of Pakistan's Textile & Apparel Exports

QR005

Prepared by: Pakistan Textile Council   3/15/26   Reference period: July-February 2026

EXECUTIVE SUMMARY

Pakistan's overall exports stood at $20.41 billion during July–February FY26, reflecting a 7% decline compared to $21.85 billion during the same period of FY25. In February 2026, exports were recorded at $2.28 billion, reflecting an 8% year-on-year decrease from $2.49 billion in February 2025. On a month-on-month basis, exports declined by 23%, indicating steep decline in recent months.

The textile and apparel sector (Chapters 50–63) remained the dominant contributor, with exports reaching $12.25 billion during July–February FY26, reflecting a marginal 0.25% increase over $12.22 billion in the same period of FY25 and accounting for approximately 60% of Pakistan's total exports. In February 2026 alone, textile and apparel exports stood at $1.32 billion, reflecting a 7% year-on-year decline and a 24% month-on-month decrease, signaling a decline in export momentum in the latest month.

Within textile and apparel exports, performance continued to vary across product categories. Traditional textiles (Chapters 50–60) recorded exports of $2.037 billion, reflecting a 7% decline from $2.193 billion in July–February FY25. In contrast, value-added textiles (Chapters 61–63) increased to $10.212 billion, up from $10.025 billion in the same period last year, reflecting approximately 2% growth. This growth was driven by knitwear (Chapter 61, +0.3%), non-knit apparel (Chapter 62, +4.9%), and other made-up articles (Chapter 63, +1.0%), reinforcing the central role of value-added segments in sustaining export performance.

Export destinations showed relatively stable trends. The European Union (27) remained the largest market with exports of $4.838 billion, followed by the United States at $3.260 billion, the United Kingdom at $1.184 billion, the United Arab Emirates at $446 million, and Bangladesh at $430 million during July–February FY26. The EU, the US and the UK markets continue to remain the anchor destinations.

The report highlights that while Pakistan's textile and apparel exports are showing resilience and growth in value-added categories, persistent declines are being observed in cotton and other traditional textiles. Strategic emphasis on provision of regionally competitive energy prices and wage policies, rationalization of tax rates, provision of affordable financing for costs related to compliance, diversification, innovation, and supportive trade policies will be critical for picking up export momentum and enhancing global market share.

Data Source: Authors Calculation based on data from PSW and PBS

About PTC

Pakistan Textile Council (PTC) is a not-for-profit organization set up to serve as a research, advocacy and impact acceleration platform for the Pakistan textile and apparel sector. Our mission is to help shape a path of sustainable growth for Pakistan's textile and apparel sector, and deliver economic and societal impact, putting Pakistan first.

PTC aims to put on the table key topics for sustainable development of Pakistan's textile sector – bringing together relevant stakeholders, establishing key facts, and facilitating effective decision-making at home and abroad. PTC aspires to help shape a new path and narrative for Pakistan's textile sector and to support the government in formulating globally comparable medium- and long-term policies, with the following objectives:

- Enable increased local and foreign investment in growth, innovation and sustainability in the textile and apparel industry – making Pakistan a sourcing destination of choice
- Generate employment and sustenance with decent work standards and gender equality thereby contributing to desirable economic and social development outcomes
- Make Pakistan textile and apparel sector internationally competitive and globally compliant to spur textile and apparel exports, generating valuable foreign exchange and contributing to a stable, sustainable and prosperous future for Pakistan

PTC aims to work on industry level topics with key stakeholders of the textile and apparel sector in Pakistan and overseas, i.e., Government of Pakistan and its relevant arms, concerned domestic and multilateral agencies/institutions, foreign governments, NGOs and trade bodies, international buyers and related bodies, industry analysts, research bodies, media, etc.

PTC aspires to serve the entire textile and apparel value chain, end-to-end (from fiber to finished products and back, including recycling), across all layers (large players and SMEs).

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Data Source: Authors Calculation based on data from PSW and PBS

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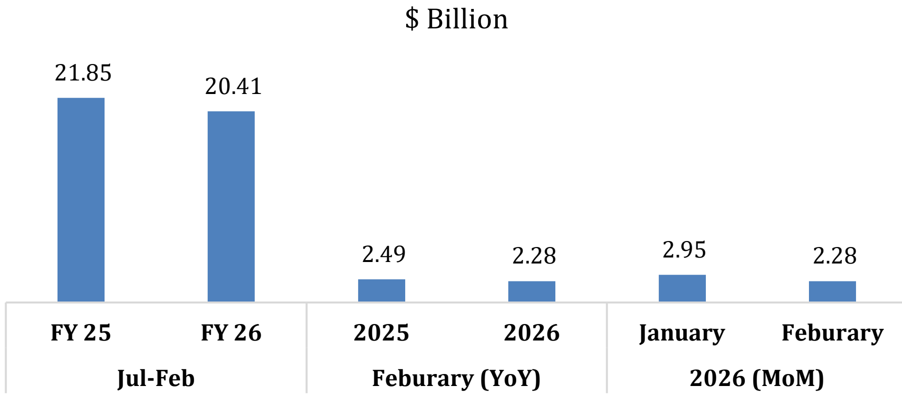
1. EXPORTS ANALYSIS OF TEXTILE & APPAREL (50-63)

1.1 OVERALL EXPORTS OF PAKISTAN

Pakistan's exports were recorded at $20.41 billion during July–February FY26, showing a 7% decline compared to $21.85 billion in the same period of FY25. In February 2026, exports stood at $2.28 billion, reflecting an 8% year-on-year decrease from $2.49 billion in February 2025. On a month-on-month basis, exports declined by 23%, from $2.95 billion in January 2025 to $2.28 billion in February 2026 (see Fig-1.1).

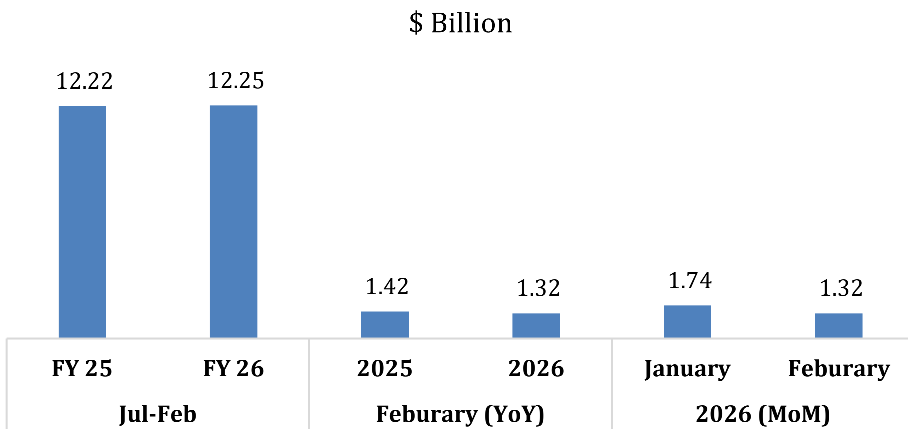
Fig-1.1: Total Exports Growth



1.2 OVERALL TEXTILE & APPAREL EXPORTS (50-63)

Pakistan's textile and apparel exports stood at $12.25 billion during July–February FY26, reflecting an increase of 0.25% from $12.22 billion in the same period of FY25. However, in February 2026 alone, exports were recorded at $1.32 billion, reflecting a 7% year-on-year decrease compared to February 2025 ($1.42 billion) and a 24% month-on-month decline from ($1.74 billion) January 2026 (see Fig-1.2).

Fig-1.2: Total Textile & Apparel Exports

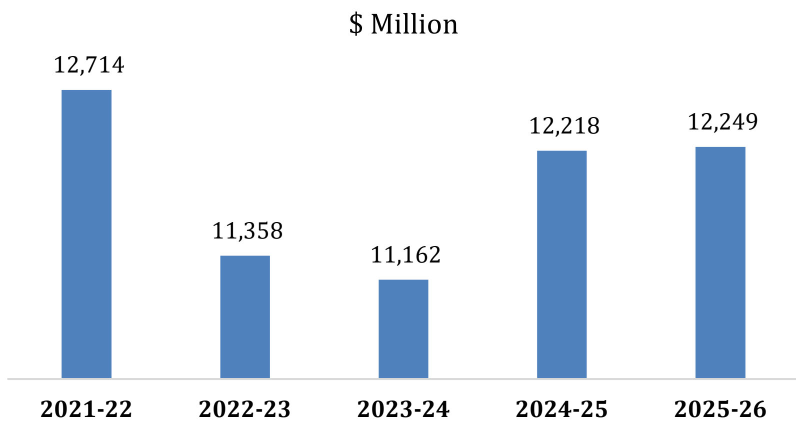


Data Source: Authors Calculation based on data from PSW and PBS

Trend Analysis

A temporary contraction followed by stabilization is observed in Pakistan's textile exports over the last five years. Exports were recorded at $12,714 million in 2021–22, followed by a notable decline to $11,358 million in 2022–23 and further to $11,162 million in 2023–24, indicating a contraction phase. However, the downward trend reversed thereafter, with exports rising to $12,218 million in 2024–25 and marginally increasing to $12,249 million in 2025–26 (see Fig-1.3). While this reflects a recovery from earlier declines, the growth in FY2026 remained subdued at 0.3%, suggesting that the recovery has slowed and export momentum remains weak.

Fig-1.3: Textile & Apparel Exports Trend (July-February)



1.3 EXPORTS BY PRODUCT CATEGORY

1.3.1 TEXTILES (CH 50-60)

Pakistan's traditional textiles (comprising raw materials and semi-processed goods) exports stood at $2,037 million during July–February FY26, reflecting a decline of 7% from $2,193 million in the same period of FY25. In February 2026, exports were recorded at $250 million, reflecting a 2% year-on-year decrease compared to February 2025 ($255 million). Similarly, a 16% month-on-month decrease was observed from ($297 million) January 2026 (see Fig-1.4).

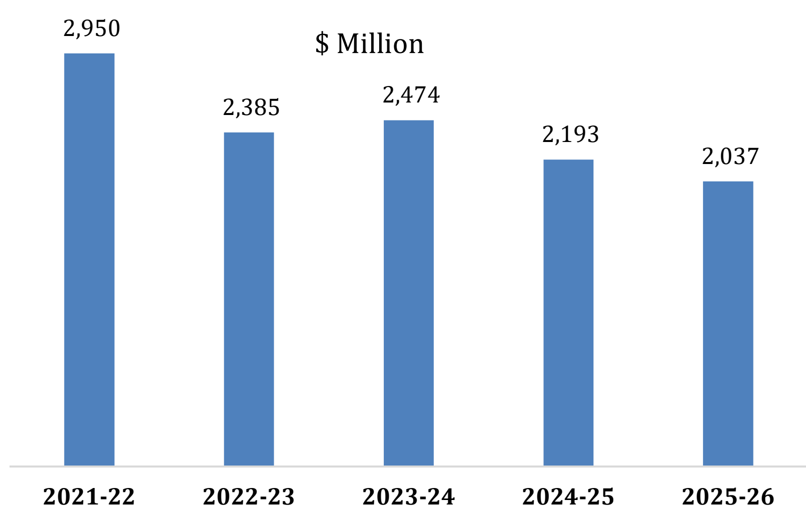
Fig-1.4: Textile & Apparel Exports

Data Source: Authors Calculation based on data from PSW and PBS

Trend Analysis

The exports of textiles from Pakistan under Chapters 50–60 show a consistent declining trend in the period of July-January over the five-year period. The highest export value was recorded in 2021–22 at $2,950 million, after which exports gradually decreased to $2,385 million in 2022–23 and slight growth was observed with the values of $2,474 million in 2023–24. The downward trajectory continued in 2024–25, with exports falling to $2,193 million, and further declined to $2,037 million in 2025–26, the lowest level in the period. Overall, exports dropped from $2,513 million in 2021–22 to $1,786 million in 2025–26, reflecting a sustained contraction across the five years (Fig-1.5).

Fig-1.5: Textile Exports Trend (Ch 50-60)



In textile exports (CH 50-60), growth shown by CH-58 special woven fabrics (+29.91%), and CH-51 coated/impregnated fabrics (+5.58%). However, declines were noted in CH-52 cotton (-7.00%), CH-54 man-made filaments (-24.05%), CH-55 Man-made staple fibers (-4.48%) CH-56 wadding, felt and nonwovens (-21.6%), CH-57 carpets (-10.8%), CH- 60 – knitted fabrics (-26.27%), and CH-53 other vegetable textile fibers (-32.23%), reflecting persistent weakness in conventional and raw material-based categories (see Table-1.1).

Table-1.1: Chapter-wise Textile Exports (Jul-Jan) % Change

HS 2	Chapters	2024-25	2025-26	%Change
50	Silk	0.11	0.06	↓41.58%
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	1.3	1.4	↑5.58%
52	Cotton	1,783	1,658	↓7.00%
53	Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	6	4	↓32.23%
54	Man-made filaments; strip and the like of man-made textile materials	50	38	↓24.05%

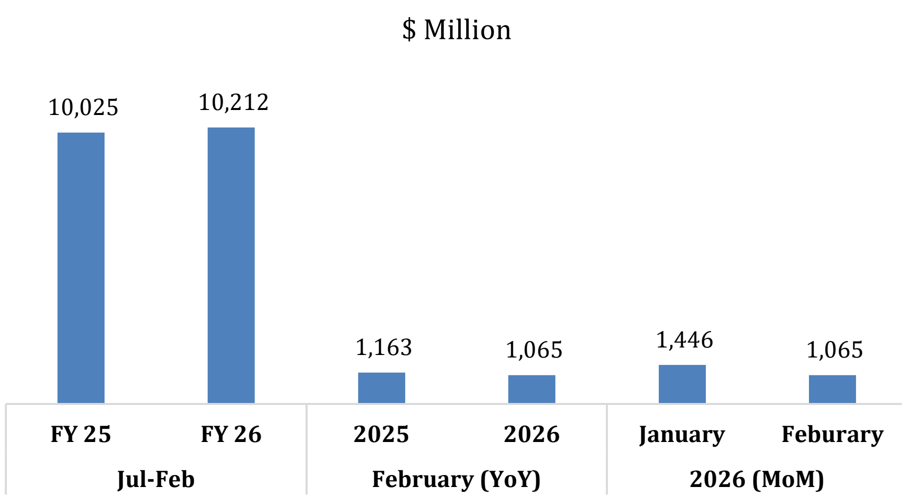
Data Source: Authors Calculation based on data from PSW and PBS

55	Man-made staple fibers	247	236	↓4.48%
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	8	6	↓21.66%
57	Carpets and other textile floor coverings	38	34	↓10.82%
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	24	32	↑29.91%
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable …	6	5	↓0.60%
60	Knitted or crocheted fabrics	30	22	↓26.27%
Total		2,193	2,037	↓7.11%

1.3.2 APPAREL AND OTHER MADE-UP TEXTILES (CH 61-63)

Pakistan's Apparel and Made-up textiles exports stood at $10,212 million during July–February FY26, reflecting an increase of 2% from $10,025 million in the same period of FY25. However, in February 2026 alone, exports were recorded at $1,065 million, reflecting an 8% year-on-year decrease compared to February 2025 ($1,163 million) and a 26% month-on-month decrease from ($1,446 million) January 2026 (see Fig-1.6).

Fig-1.6: Apparel and Made-up textiles Exports



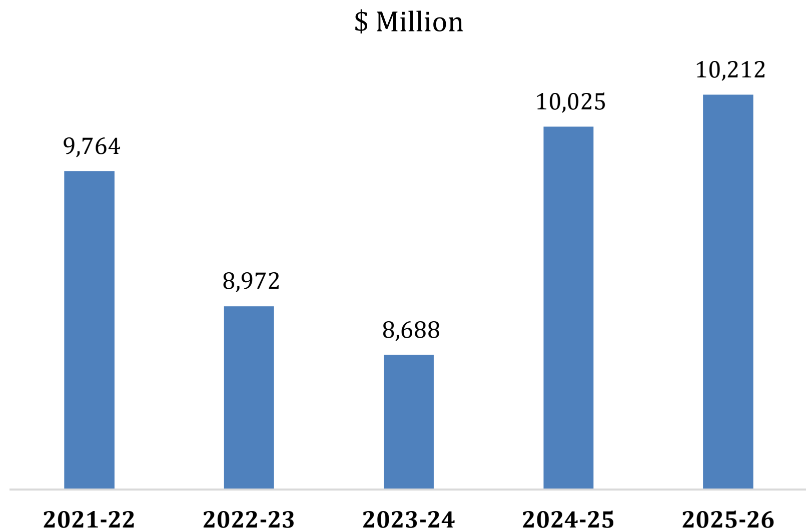
Trend Analysis

The exports of Pakistan under Chapters 61–63 show a recovery trend over the five-year period, following an initial decline. Exports decreased from USD 9,764 million in 2021–22 to USD 8,972 million in 2022–23, and further to USD 8,688 million in 2023–24, marking the lowest point in the series. This was followed by a strong rebound, with exports rising to USD 10,025 million in 2024–25 and further increasing to USD 10,212 million in 2025–26, the highest level recorded during the period. Overall, exports grew from USD 9,764 million in 2021–22 to USD 10,212 million in 2025–26, reflecting a CAGR of approximately 1.1% over the period.

Data Source: Authors Calculation based on data from PSW and PBS

While this indicates a positive long-term trend, the pace of growth remains modest, with momentum slowing in the most recent year compared to the sharp recovery observed in FY2025.

Fig-1.7: Apparel and Other Made-Up Textiles Exports Trend (Ch 61-63)



In Apparel and Other Made-Up Textiles exports, growth was driven by all three categories collectively: Chapter 61 – knitwear ($3,412m, +0.3%), Chapter 62 – non-knit apparel ($2,907m, +4.9%), and Chapter 63 – other made-up articles ($3,893m, +1%). Together, these value-added segments collectively increased from $10,025 million in 2024–25 to $10,212 million in 2025–26, reflecting an overall growth of 1.9%, and highlighting the central role of apparel and made-up articles in sustaining Pakistan's textile export expansion.

Table-1.2: Chapter-wise Textile-Clothing Exports % Change

HS 2	Chapters	2024-25	2025-26	%Change
61	Articles of apparel, accessories, knit or crochet	3,400	3,412	↑0.3%
62	Articles of apparel and clothing accessories, not knitted or crocheted	2,771	2,907	↑4.9%
63	Other made textile articles, sets, worn clothing etc	3,854	3,893	↑1.0%
Total		**10,025**	**10,212**	**↑1.9%**

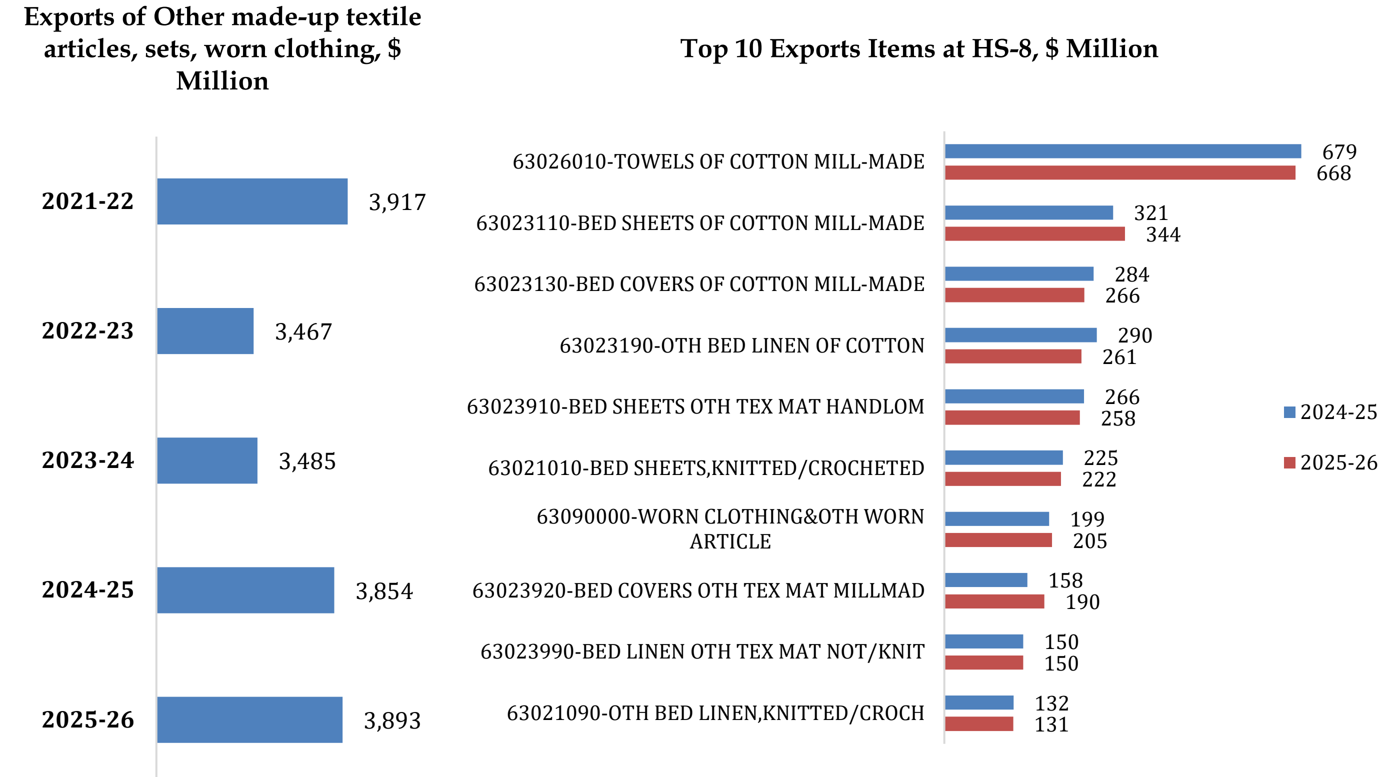
1.3.2a HIGHEST EXPORTED CATEGORY - CHAPTER 63 - OTHER MADE TEXTILE ARTICLES, SETS, WORN CLOTHING ETC

The exports of Chapter 63 (Other made-up textile articles, sets, worn clothing, etc.) graphed below show an overall increasing trend over the five-year period. The highest exports were recorded in 2021-22 at $3,917 million. Overall, exports decrease from $3,917 million in 2021–22 to $3,893 million in 2025–26. Individually out of the top 10 exported items in Chapter 63: major decline was recorded in "HS 6302.3190 Other bed linen of Cotton" from $290 million

Data Source: Authors Calculation based on data from PSW and PBS

(Jul-Jan FY 25) to $261 million in FY26, and "HS 63023130-bed covers of cotton mill-made" from $284 million (Jul-Feb FY 25) to $266 million in FY 26 in the same period.

Fig-1.8: Ch-63 Exports trends over last 5 years and top 10 Exports items



1.3.2b 2ND HIGHEST EXPORTED CATEGORY - CHAPTER 61 – ARTICLES OF APPAREL, ACCESSORIES, KNIT OR CROCHET

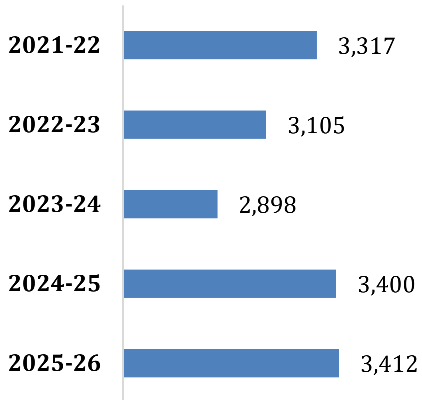
The graph below shows the export performance of Chapter 61 (Articles of apparel and accessories, knit or crochet) over the last five years. The exports show an overall increasing trend across the five-year period. The highest exports were recorded in 2025–26 at $3,412 million. Overall, exports grew from $3,317 million in 2021–22 to $3,099 million in 2025–26, reflecting an increase of 3%. Individually out of the top 10 exported items in Chapter 61: "Knitted or crocheted T-shirts, singlets, and other vests made from "other textile materials (HS 6109.9090)" declined from $235 million (July- February 2024-25) to $212 million in FY 2025-26 and "Knitted or crocheted gloves, mittens, and mitts (HS 6116.1000)" declined from $166 million (July- February 2024-25) to $147 million in FY 2025-26.

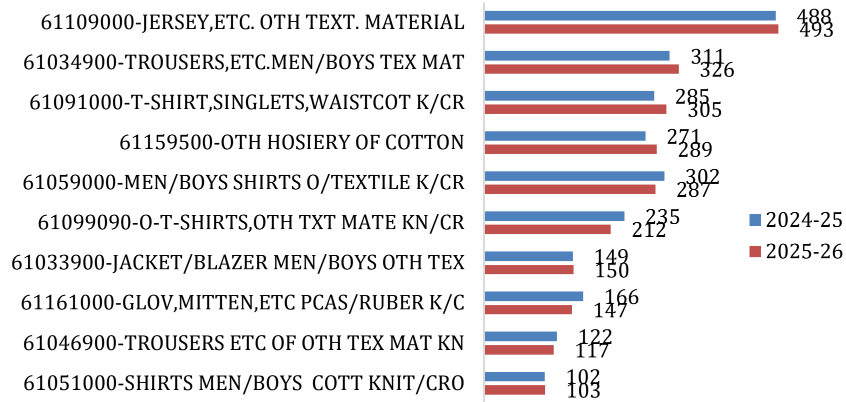
Fig-1.9: Ch-61 Exports trends over last 5 years and top 10 exports items

Exports of Article of Apparel, accessories, knit or crochet, $ Million

Top 10 Exports Items at HS -8, $ Million

Data Source: Authors Calculation based on data from PSW and PBS



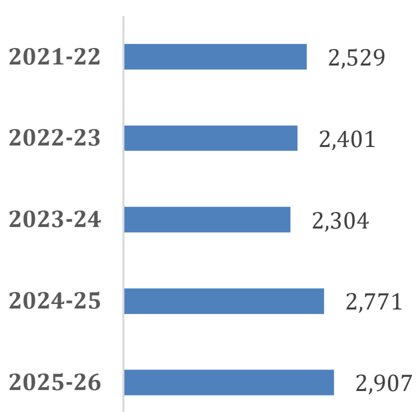


1.3.2c 3RD HIGHEST EXPORTED CATEGORY - CHAPTER 62- ARTICLES OF APPAREL AND CLOTHING ACCESSORIES, NOT KNITTED OR CROCHETED

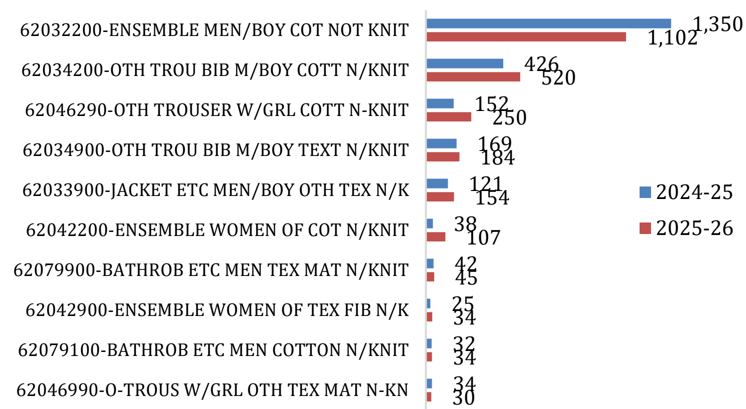
The exports of Chapter 62 (Articles of apparel and clothing accessories, not knitted or crocheted) show an overall increasing trend over the five-year period. The highest exports were recorded in 2025–26 at $2,907 million. Overall, exports rose from $2,529 million in 2021–22 to $2,907 million in 2025–26, reflecting an increase of 15%. Individually out of the top 10 exported items in Chapter 62: "Cotton ensembles, specifically men's or boys' suits, jackets, and blazers made of cotton, as well as other ensembles, trousers, shorts, and overalls that are not swimwear (HS-6203.2200)" declined from $1,350 million (July- January 2024-25) to $1,102 million in FY 2025-26.

Fig-1.10: Ch-62 Exports trends over last 5 years and top 10 Exports items

Exports of Article of Apparel, and clothing accessories, not knit or crochet, $ Million



Top 10 Exports Items at HS-8, $ Million



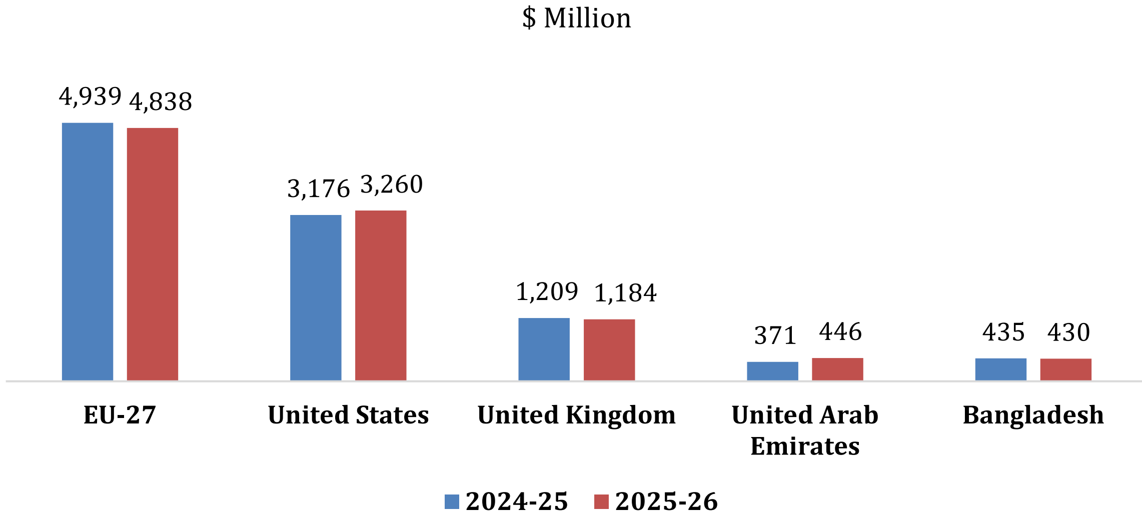
1.4 EXPORTS BY DESTINATION COUNTRY

Pakistan's top five textile and apparel export destinations showed nominal growth in 2025–26 compared to the previous year. The EU (27) was the largest market with exports slightly fall from $4,939 (Jul-Feb FY 25) million to $4,838 million (Jul-Feb FY 26), followed by the

Data Source: Authors Calculation based on data from PSW and PBS

United States at $3,260 million, the UK at $1,184 million, the UAE at $446 million and the Bangladesh with $430 million in FY 26.

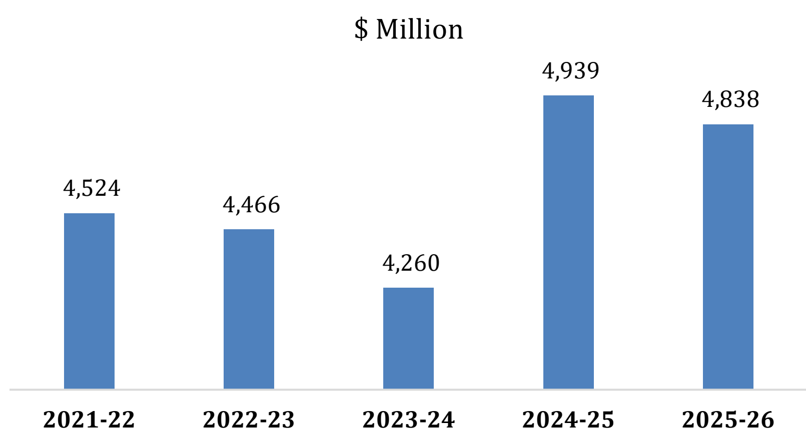
Fig-1.11: Top 05 Textile Exports Destinations



1.4.1 EUROPEAN UNION (27)

Pakistan's textile and apparel exports exhibited a fluctuating pattern but maintained an overall upward trajectory. After declining to USD 4,260 million in 2023–24, exports rebounded strongly to USD 4,939 million, before easing slightly to USD 4,838 million in 2025–26, while remaining above earlier levels.

Fig-1.12: Trend of Textile Exports to EU



Top 10 exports to EU – HS 8 level

The following table presents the top 10 exports to the EU, indicating whether they show an increasing or decreasing trend.

Data Source: Authors Calculation based on data from PSW and PBS

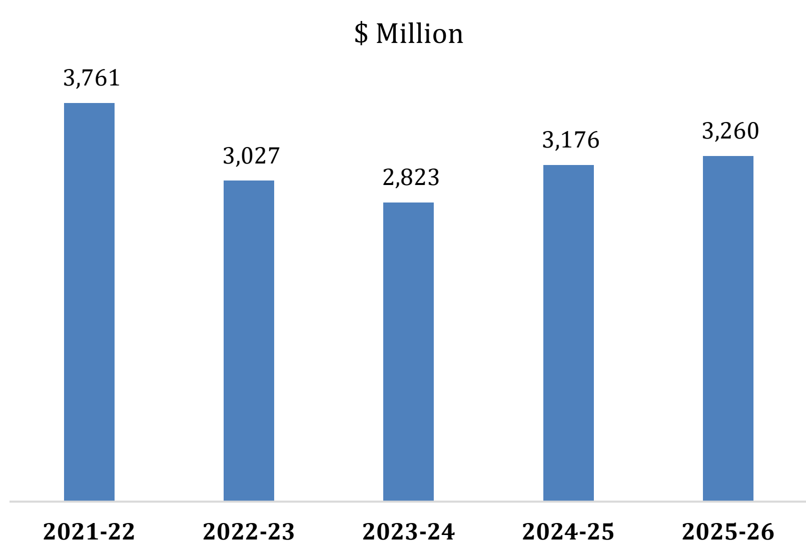
Table-1.3: Top 10 exports to EU – HS 8 level

Values in USD Million					
Sr.#	**HS-8**	**Top 10 Products**	**2024-25**	**2025-26**	**%Change**
1.	62032200	Ensemble men/boy cot not knit	673	551	↓18.08%
2.	62034200	Oth trou bib m/boy cotton n/knit	255	279	↑9.44%
3.	63026010	Towels of cotton mill-made	287	274	↓4.49%
4.	63023110	Bed sheets of cotton mill-made	179	198	↑10.69%
5.	63023130	Bed covers of cotton mill-made	203	191	↓6.25%
6.	63023190	Oth bed linen of cotton	183	174	↓5.13%
7.	61109000	Jersey, etc. Oth text. Material	186	168	↓9.59%
8.	63021010	Bed sheets, knitted/crocheted	158	156	↓1.22%
9.	61034900	Trousers, etc. men/boys textile mat	153	151	↓1.03%
10.	61159500	Oth hosiery of cotton	130	126	↓3.00%

1.4.2 UNITED STATES

Pakistan's textile exports to the United States fluctuated over the five-year period. After peaking at USD 3,761 million in 2021–22, exports declined to USD 2,823 million in 2023–24 before recovering to USD 3,260 million in 2025–26. However, levels remain below the 2021–22 peak.

Fig-1.13: Trend of Textile Exports to USA



Top 10 exports to USA – HS 8 level

The following table presents the top 10 exports to the United States, indicating whether they show an increasing or decreasing trend.

Table-1.4: Top 10 exports to USA – HS 8 level

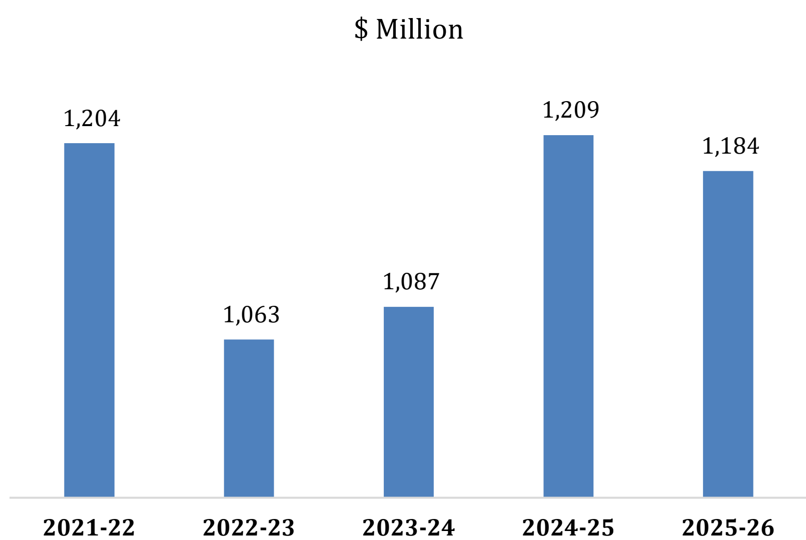
Data Source: Authors Calculation based on data from PSW and PBS

Values in USD Million					
Sr.#	**HS-8**	**Top 10 Products**	**2024-25**	**2025-26**	**%Change**
1.	62032200	Ensemble men/boy cot not knit	423	334	↓20.91%
2.	63026010	Towels of cotton mill-made	234	242	↑3.69%
3.	61109000	Jersey, etc. Oth text. Material	175	206	↑17.83%
4.	62034200	Oth trou bib m/boy cotton n/knit	92	126	↑36.86%
5.	61099090	O-t-shirts, other txt mate kn/cr	140	123	↓12.01%
6.	61059000	Men/boys shirts o/textile k/cr	120	122	↑1.30%
7.	61091000	T-shirt, singlets, waistcoat k/cr	101	113	↑12.16%
8.	61159500	Oth hosiery of cotton	96	111	↑14.80%
9.	61034900	Trousers, etc. men/boys tex mat	73	89	↑21.81%
10.	63023110	Bed sheets of cotton mill-made	88	76	↓13.36%

1.4.3 UNITED KINGDOM

Pakistan's textile exports to the UK declined from USD 1,204 million in 2021–22 to USD 1,063 million in 2022–23, followed by a gradual recovery to USD 1,087 million in 2023–24 and a peak of USD 1,209 million in 2024–25. However, exports slightly moderated to USD 1,184 million in 2025–26. Overall, exports demonstrate a recovery after the initial decline, though the latest year indicates a mild slowdown, with levels remaining broadly close to the 2021–22 benchmark rather than significantly surpassing it.

Fig-1.14: Trend of Textile Exports to UK



Top 10 Exports to UK – HS 8 Level

The following table presents the top 10 exports to the United Kingdom, indicating whether they show an increasing or decreasing trend.

Data Source: Authors Calculation based on data from PSW and PBS

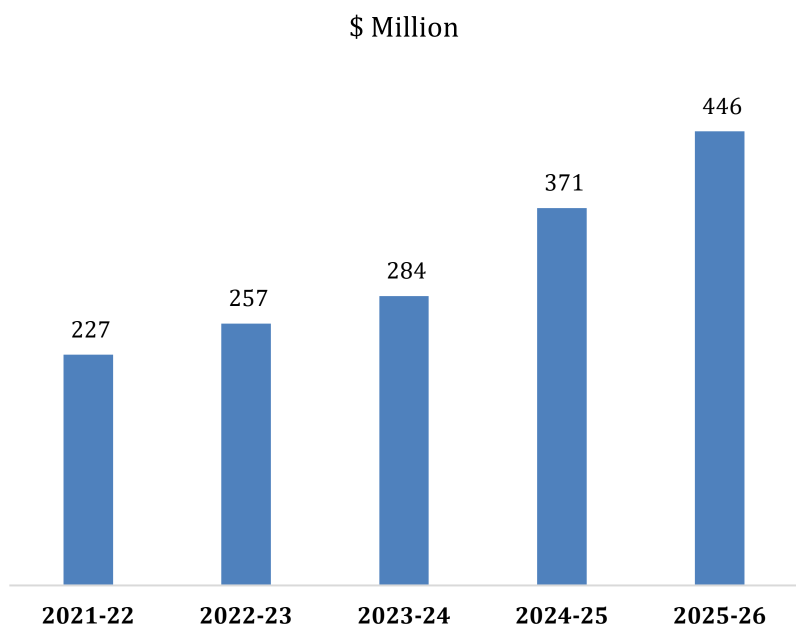
Table-1.5: Top 10 exports to UK – HS 8 level

Values in USD Million					
Sr. #	**HS-8**	**Top 10 Products**	**2024-25**	**2025-26**	**%Change**
1.	62032200	Ensemble men/boy cot not knit	90	80	↓10.50%
2.	61109000	Jersey, etc. Oth text. Material	81	74	↓8.82%
3.	63026010	Towels of cotton mill-made	72	66	↓8.31%
4.	63023920	Bed covers other textile mat. Mill-made	55	53	↓3.09%
5.	61034900	Trousers, etc. men/boys tex mat	50	53	↑5.76%
6.	63023910	Bed sheets other textile mat handloom	49	48	↓2.13%
7.	63023130	Bed covers of cotton mill-made	46	46	↓0.72%
8.	61059000	Men/boys shirts o/textile k/cr	63	44	↓29.86%
9.	63023110	Bed sheets of cotton mill-made	33	40	↑20.80%
10.	63023190	Oth bed linen of cotton	40	32	↓21.69%

1.4.4 UNITED ARAB EMIRATE

The exports of textiles from Pakistan to the UAE show an increasing trend over the five-year period. The highest exports were recorded in 2025-26 at $446 million, while the lowest were recorded in 2021-22 at $227 million.

Fig-1.16: Trend of Textile Exports to UAE



Top 10 Exports to UAE

Data Source: Authors Calculation based on data from PSW and PBS

The following table presents the top 10 exports to the UAE, indicating whether they show an increasing or decreasing trend.

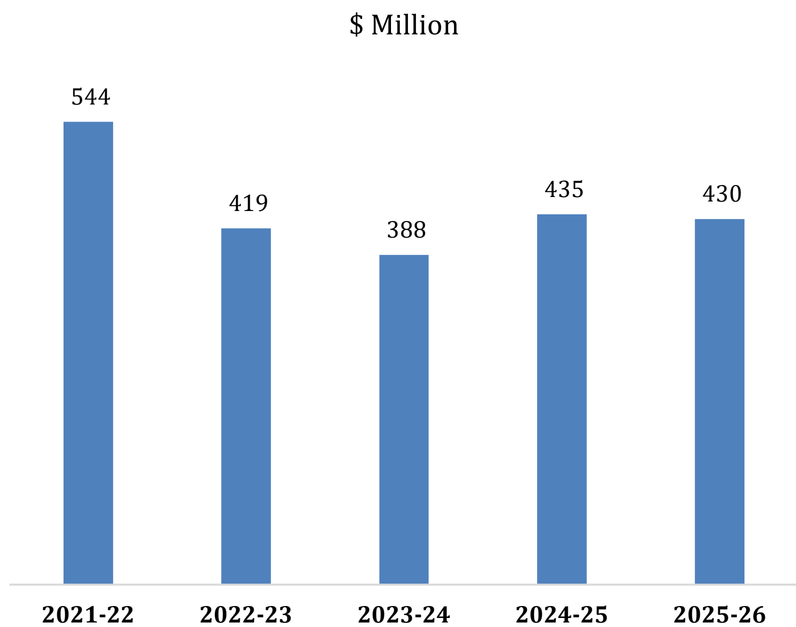
Table-1.7: Top 10 exports to UAE – HS 8 level

Values in USD Million					
Sr. #	**HS 8**	**Top 10 Products**	**2024-25**	**2025-26**	**%Change**
1.	62032200	Ensemble men/boy cot not knit	52.5	44.4	↓15.59%
2.	62033900	Jacket etc. men/boy other textile n/k	13.6	35.5	↑161.13%
3.	62034200	Oth trou bib m/boy cotton n/knit	16.2	26.7	↑64.98%
4.	61109000	Jersey, etc. Oth text. Material	16.0	15.7	↓1.31%
5.	63026010	Towels of cotton mill-made	12.9	13.1	↑1.75%
6.	61034900	Trousers, etc. men/boys textile mat	9.9	11.6	↑16.49%
7.	63062990	Tents of other textile material	7.3	9.8	↑34.75%
8.	63023200	Oth bed linen of man-made fib	5.8	8.6	↑48.93%
9.	55121900	Oth woven fab of syn staple fib	15.1	8.4	↓43.96%
10.	52094200	Cotton woven fab denim>200g/sqm	7.3	7.2	↓0.97%

1.4.5 BANGLADESH

The exports of Pakistan to Bangladesh show declining trend from 2021-22 to 2023-24 and then slight pickup in 2024-25. The highest exports were recorded in 2021–22 at $544 million. In 2025-26 the exports are now at $430 million.

Fig-1.15: Trend of Textile Exports to Bangladesh



Data Source: Authors Calculation based on data from PSW and PBS

Top 10 Exports to Bangladesh

The following table presents the top 10 exports to Bangladesh, indicating whether they show an increasing or decreasing trend. Also, Bangladesh is mainly importing raw materials from Pakistan i.e. cotton yarn and cotton fabric.

Table-1.6: Top 10 exports to Bangladesh – HS 8 level

Values in USD Million					
Sr. #	**HS -8**	**Top 10 Products**	**2024-25**	**2025-26**	**%Change**
1.	52094200	Cotton woven fab denim>200g/sqm	216.7	233.0	↑7.50%
2.	52114200	W-fab cot denim, mx mfw>200g/sqm	52.6	44.6	↓15.20%
3.	52093200	Cotton woven fab dyed 3-4 thread	41.5	41.2	↓0.75%
4.	52051200	S-cot. yarn ucf.d-232.56-714.29	23.1	20.4	↓11.60%
5.	52051100	Sin.cot.yar.u.com.fib.d-714.29	20.8	14.5	↓30.33%
6.	52092200	Cot woven fab 3/4thrd w>200g/sqm	7.6	7.3	↓4.49%
7.	52122300	Oth cot woven fab dyed>200g/sqm	7.7	5.7	↓26.48%
8.	52113200	Wov fab 3-4 thread mix>200gdyed	3.9	3.9	↑1.40%
9.	52093900	Oth cot woven fab dyed>200g/sqm	5.5	3.6	↓34.37%
10.	52083900	Oth cotton woven fab<2000/sqm dye	5.0	1.3	↓73.69%

Data Source: Authors Calculation based on data from PSW and PBS

2. POLICY INTERVENTIONS RECOMMENDED

- Wages & labor policies: Alignment of wage and overtime regulations with practices in key competitor countries (e.g., Bangladesh) to restore cost competitiveness.
- Liquidity & tax friction removal: Reduction in taxes, 72-hour automated refunds (risk-based post-audit), zero-rating of inputs via the Export Facilitation Scheme.
- Regionally competitive, predictable energy pricing for export-oriented industries.
- HS 61–63 push (value addition): time-bound incremental export rebate tied to value addition, compliance to SDGs and ESG requirements.
- HS 50–60 repair: Structural reforms to improve cotton quality and yield, support for spinning and weaving sector by reducing cost of doing business in Pakistan.
- Financing: Strengthening of EXIM Bank, enhancement in limits of EFS and LTFF and provision of financing schemes to support innovation, renewable/sustainable energy, green projects and related investments.
- Policy stability: 5-year export/textile & apparel/industrial policy with legal cover (no ad-hoc SROs), and transparent monitoring of implementation of policies by publishing KPIs on monthly basis.

Data Source: Authors Calculation based on data from PSW and PBS

CONCLUSION

Pakistan's export performance reflects resilience in value-added textiles (HS 61–63) but continued stress in traditional segments (HS 50–60). To sustain and accelerate growth, regionally competitive and predictable energy pricing must be ensured, alongside liquidity and tax reforms to remove friction for exporters. A sharper policy focus is needed to incentivize value addition under HS 61–63 through time-bound rebates linked with SDG and ESG compliance, and duty-free imports of essential raw materials, while simultaneously addressing structural challenges in HS 50–60 by improving cotton quality and reducing the cost of doing business. Strengthening of EXIM Bank, enhancing allocation for EFS and LTFF, and new schemes for green and innovative investments will be essential to meet evolving buyer demands. Finally, a stable 5-year policy framework with legal cover, supported by transparent, KPI-based monitoring, will provide exporters with the certainty required to compete globally and deliver sustained export growth.

Data Source: Authors Calculation based on data from PSW and PBS