PAKISTAN TEXTILE COUNCIL

Empowering Pakistan's Textile Sector

Monthly Report

Pakistan's Textile & Apparel Exports

Reference Period: July – March 2026 (9M FY26)

Prepared by: Pakistan Textile Council

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EXECUTIVE SUMMARY

Pakistan's overall exports stood at $22.67 billion during July–March FY26, reflecting an 8% decline compared to $24.72 billion in the same period of FY25. In March 2026, exports were recorded at $2.28 billion, reflecting a 14% year-on-year decrease from $2.65 billion in March 2025. On a month-on-month basis, exports remained unchanged, indicating stabilization in export levels in the latest month.

The textile and apparel sector (Chapters 50–63) remained the dominant contributor, with exports reaching $13.58 billion during July–March FY26, reflecting a slight decline of 0.5% from $13.65 billion in the same period of FY25 and accounting for approximately 60% of Pakistan's total exports. In March 2026, textile and apparel exports stood at $1.33 billion, reflecting a 7% year-on-year decline and a 1% month-on-month increase, indicating marginal recovery in the latest month.

Within textile and apparel exports, performance continued to vary across product categories. Traditional textiles (Chapters 50–60) recorded exports of $2.284 billion, reflecting a 7% decline from $2.450 billion in July–March FY25. In contrast, value-added textiles (Chapters 61–63) increased to $11.299 billion, up from $11.201 billion, reflecting around 1% growth. This growth was primarily driven by non-knit apparel (Chapter 62, +3.8%) and other made-up articles (Chapter 63, +0.6%), while knitwear (Chapter 61) showed a slight decline (-1.1%), reinforcing the continued importance of value-added segments in sustaining export performance.

Export destinations showed broadly stable trends. The European Union (27) remained the largest market with exports of $5.383 billion, followed by the United States ($3.607 billion), the United Kingdom ($1.316 billion), Bangladesh ($485 million), and China ($470 million) during July–March FY26. While core markets continue to anchor export performance, concentration risks persist, underscoring the need for diversification.

The report highlights that while Pakistan's textile 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.

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).

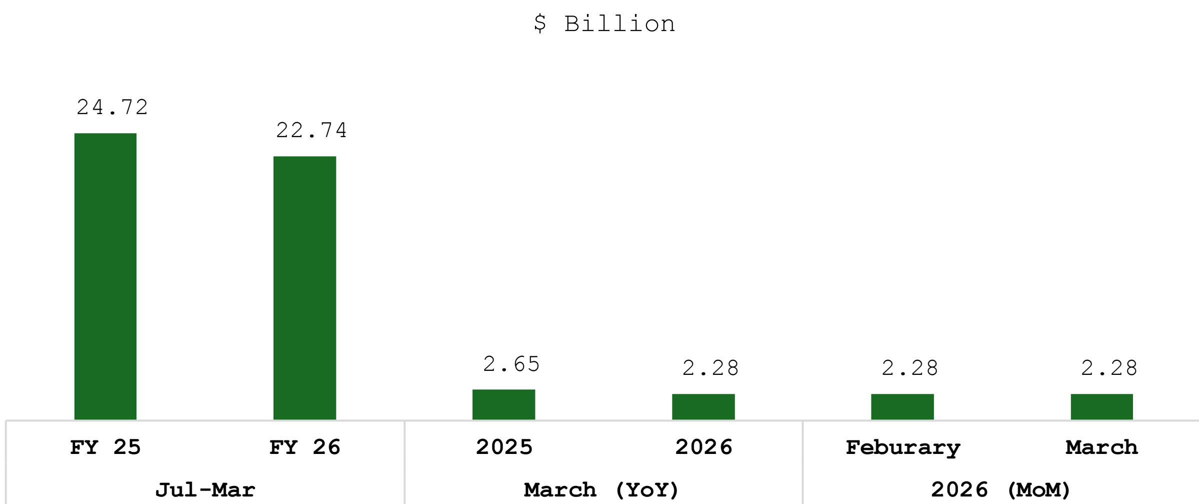
PTC Membership

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

1.1 Overall Exports of Pakistan

Pakistan's exports were recorded at $22.67 billion during July–March FY26, showing an 8% decline compared to $24.72 billion in the same period of FY25. In March 2026, exports stood at $2.28 billion, reflecting a 14% year-on-year decrease from $2.65 billion in March 2025. On a month-on-month basis, there was no change from $2.28 billion in February 2026 to $2.28 billion in March 2026.

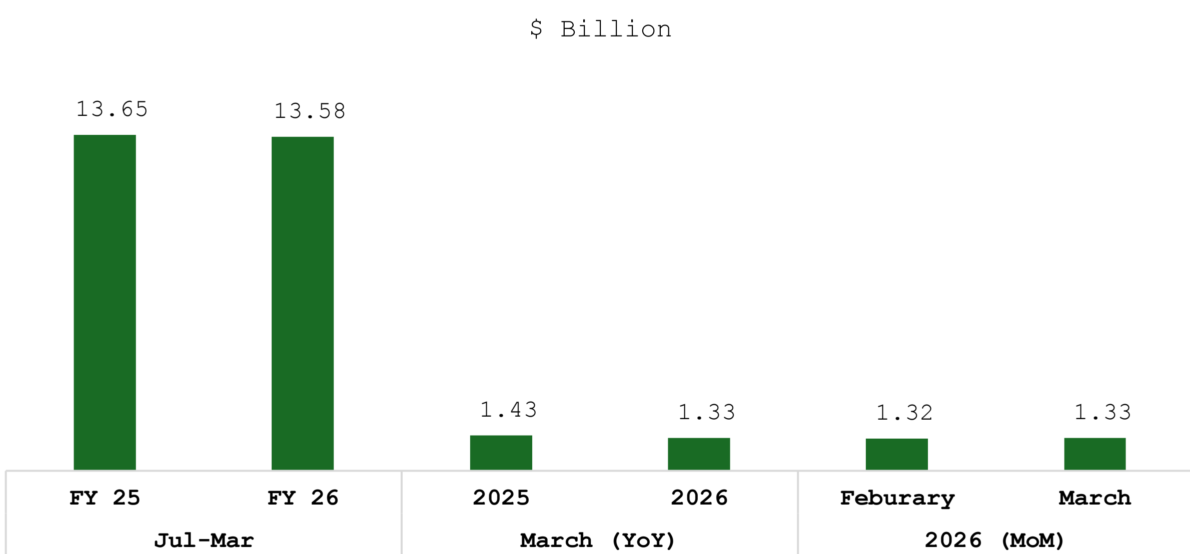
Fig 1.1 – Total Exports Growth



1.2 Overall Textile & Apparel Exports (Chapters 50–63)

Pakistan's textile and apparel exports stood at $13.58 billion during July–March FY26, reflecting a decrease of 0.5% from $13.65 billion in the same period of FY25. In March 2026 alone, exports were recorded at $1.33 billion, reflecting a 7% year-on-year decrease compared to March 2025 ($1.43 billion) and a 1% month-on-month increase from $1.32 billion in February 2026.

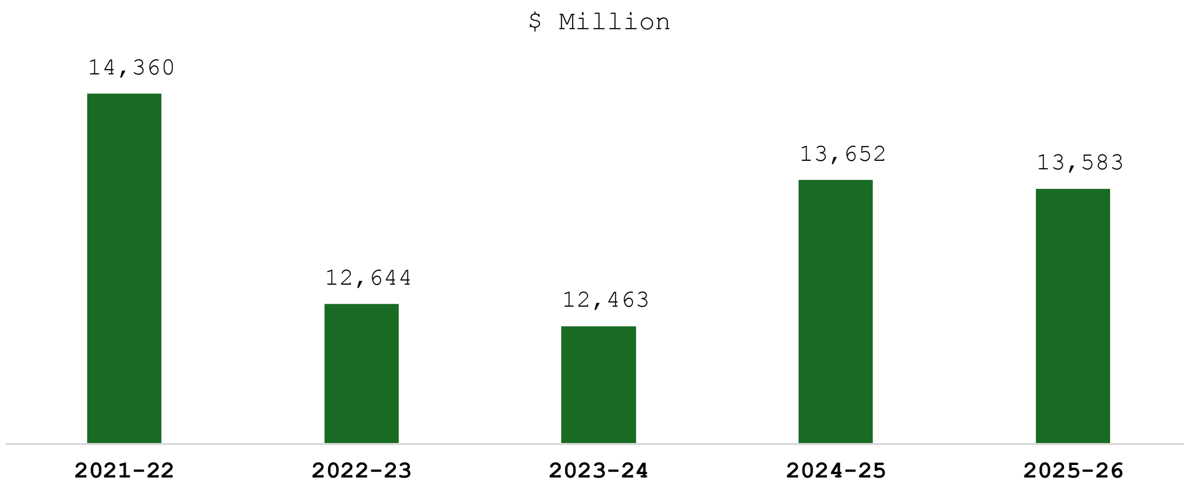
Fig 1.2 – Total Textile & Apparel Exports



Trend Analysis

A temporary contraction followed by stabilization is observed in Pakistan's textile exports over the last five years. Exports were recorded at $14,360 million in 2021–22, followed by declines to $12,644 million in 2022–23 and $12,463 million in 2023–24. The downward trend reversed thereafter, with exports rising to $13,652 million in 2024–25 and marginally continuing to $13,583 million in 2025–26. While this indicates partial recovery, growth turned marginally negative in FY26 (-0.5%), largely attributable to external uncertainties including the adverse impact of the US–Iran conflict on global trade dynamics.

Fig 1.3 – Textile & Apparel Exports Trend (July–March)

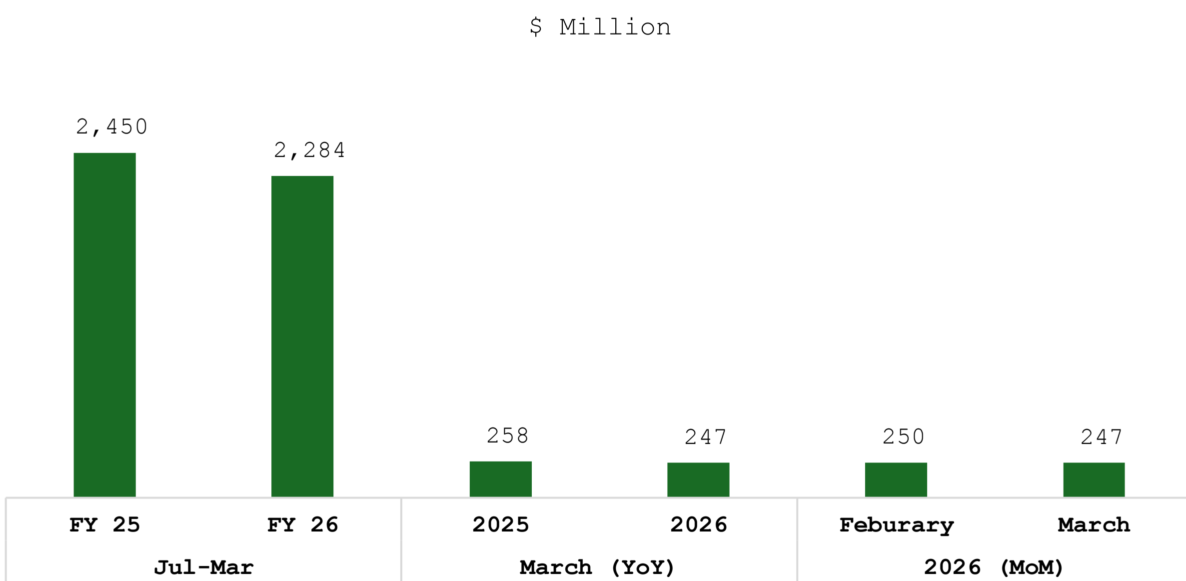


1.3 Exports by Product Category

A. Traditional Textiles (Chapters 50–60)

Pakistan's traditional textiles exports stood at $2,284 million during July–March FY26, reflecting a decline of 7% from $2,450 million in the same period of FY25. In March 2026, exports were recorded at $247 million, reflecting a 4% year-on-year decrease compared to March 2025 ($258 million) and a 1% month-on-month decrease from February 2026 ($250 million).

Fig 1.4 – Textile Exports (Ch 50-60)



Trend Analysis

The exports of textiles under Chapters 50–60 show a consistent declining trend over the five-year period. The highest export value was recorded in 2021–22 at $3,322 million, declining to $2,678 million in 2022–23 and slightly recovering to $2,731 million in 2023–24, before resuming decline to $2,450 million in 2024–25 and $2,284 million in 2025–26. Growth was shown by special woven fabrics CH-58 (+21.68%) and coated/impregnated fabrics CH-51 (+6.65%), while declines were recorded across cotton, man-made fibers, carpets, and knitted fabrics.

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

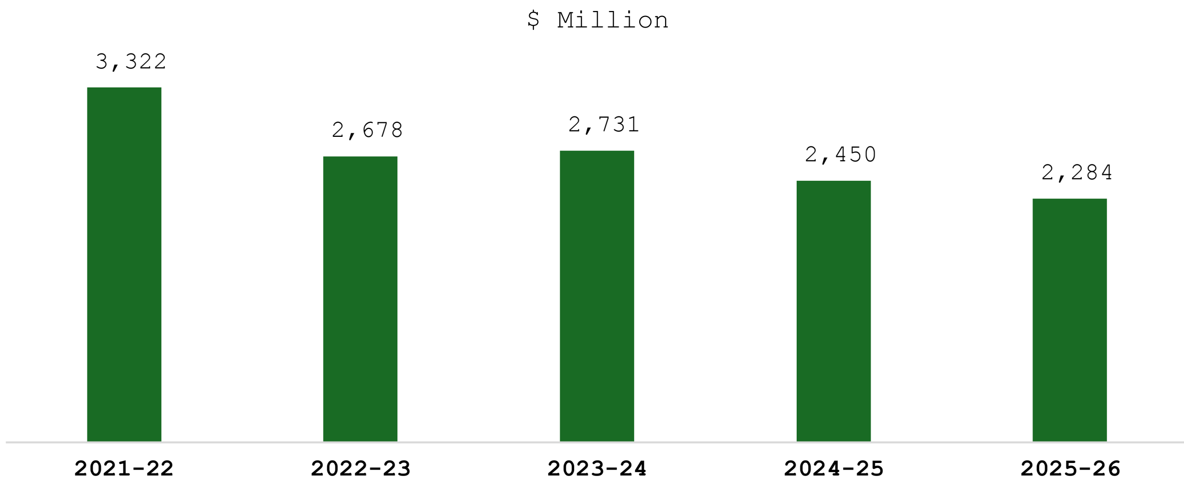


Table 1.1: Chapter-wise Textile Exports (July–March) – % Change

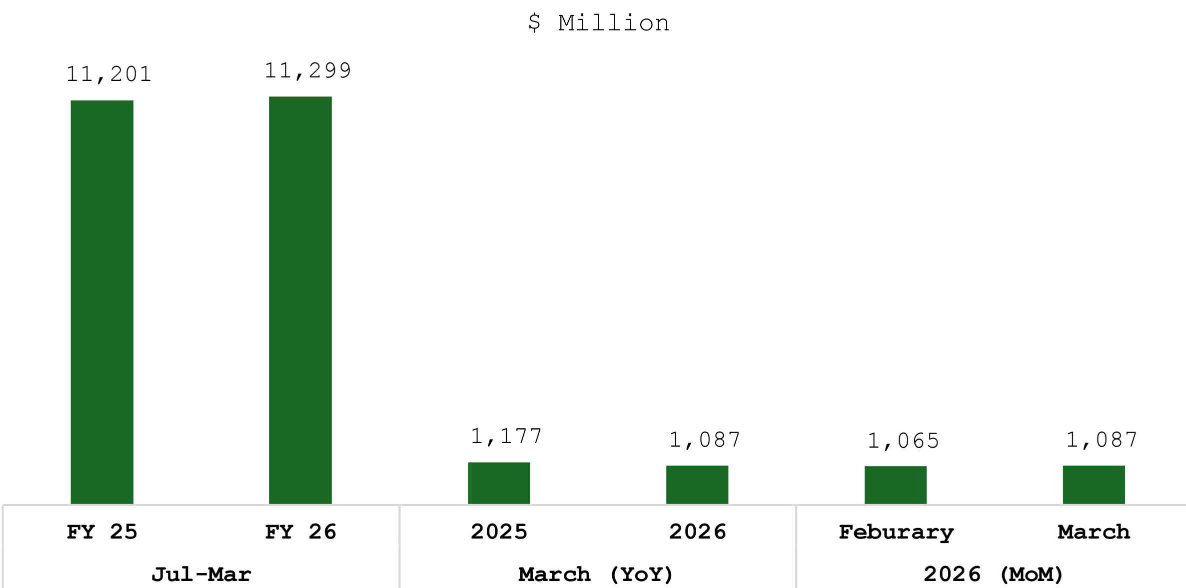
Values in USD Million

HS 2	Chapter Description	2024-25 ($M)	2025-26 ($M)	% Change
50	Silk	0.13	0.07	↓44.26%
51	Wool, fine/coarse animal hair; horsehair yarn and woven fabric	1.5	1.6	↑6.65%
52	Cotton	1,988.8	1,867.9	↓6.08%
53	Other vegetable textile fibers; paper yarn and woven fabrics	6.1	4.2	↓31.10%
54	Man-made filaments; strip and the like of man-made textile materials	54.0	40.7	↓24.70%
55	Man-made staple fibers	278.6	258.4	↓7.24%
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes	8.9	7.1	↓19.58%
57	Carpets and other textile floor coverings	42.3	37.0	↓12.34%
58	Special woven fabrics; tufted textile fabrics; lace; tapestries	29.3	35.7	↑21.68%
59	Impregnated, coated, covered or laminated textile fabrics	6.4	5.7	↓11.02%
60	Knitted or crocheted fabrics	34.5	25.2	↓26.92%
	Total	**2,450**	**2,284**	**↓6.81%**

B. Apparel and Other Made-Up Textiles (Chapters 61–63)

Pakistan's Apparel and Made-up textiles exports stood at $11,299 million during July–March FY26, reflecting an increase of 1% from $11,201 million in the same period of FY25. In March 2026, exports were recorded at $1,087 million, reflecting an 8% year-on-year decrease compared to March 2025 ($1,177 million) and a 2% month-on-month increase from February 2026 ($1,065 million).

Fig 1.6 – Apparel and Made-Up Textiles Exports



Trend Analysis

The exports under Chapters 61–63 show a recovery trend over the five-year period. Exports decreased from $11,073 million in 2021–22 to $9,731 million in 2023–24, marking the lowest point, before rebounding strongly to $11,201 million in 2024–25 and further increasing to $11,299 million in 2025–26. This represents a CAGR of approximately 0.6% over the period. Growth was driven across all three sub-categories: Chapter 61 (knitwear, $3,743M, -1.1%), Chapter 62 (non-knit apparel, $3,208M, +3.8%), and Chapter 63 (made-up articles, $4,347M, +0.6%).

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

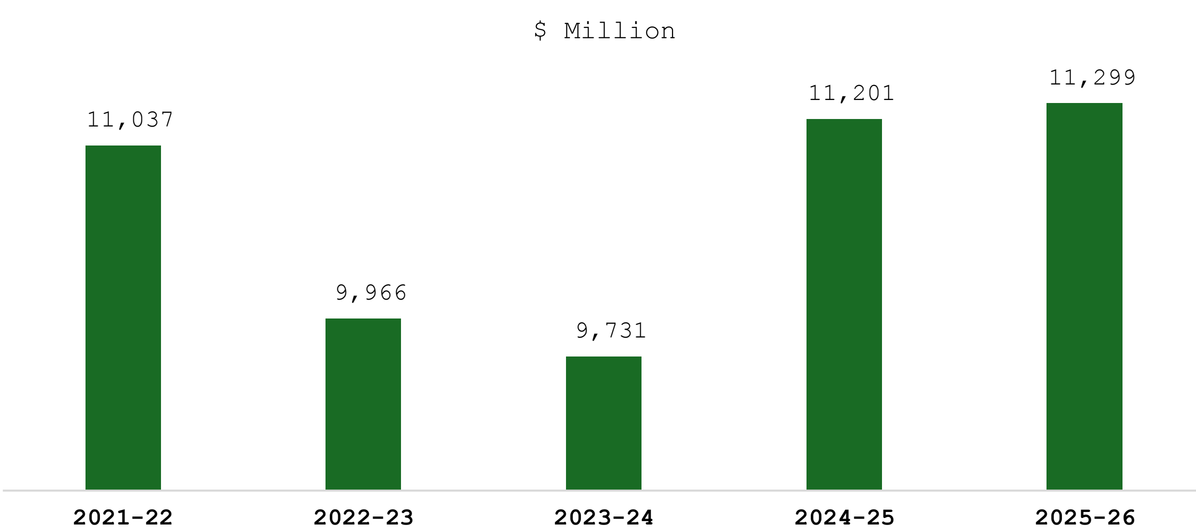


Table 1.2: Chapter-wise Textile-Clothing Exports – % Change

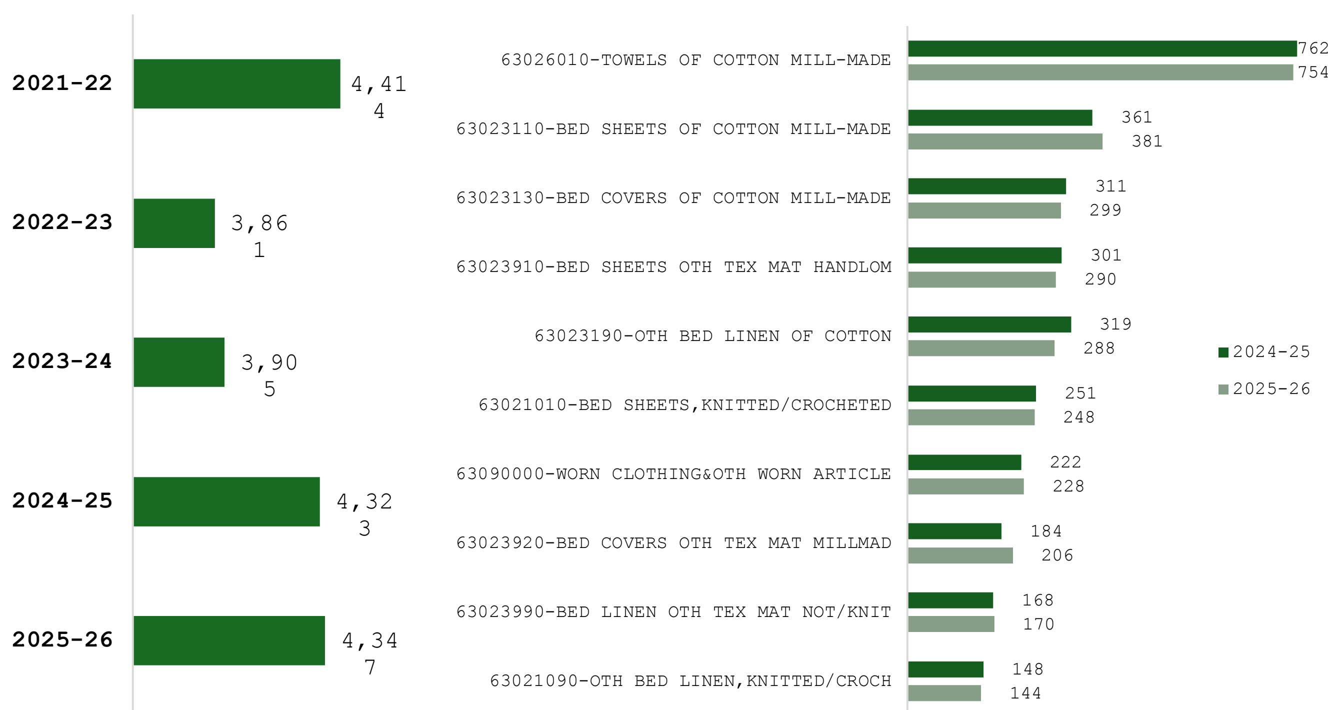
Values in USD Million

HS 2	Chapter Description	2024-25 ($M)	2025-26 ($M)	% Change
61	Articles of apparel, accessories, knit or crochet	3,787	3,743	↓1.1%
62	Articles of apparel and clothing accessories, not knitted or crocheted	3,091	3,208	↑3.8%
63	Other made textile articles, sets, worn clothing etc	4,323	4,347	↑0.6%
	Total	**11,201**	**11,299**	**↑0.9%**

(i) Chapter 63 – Highest Exported Category: Other Made Textile Articles

The exports of Chapter 63 show an overall trend over the five-year period. The highest exports were recorded in 2021–22 at $4,414 million, with 2025–26 reaching $4,347 million. Notable declines were recorded in 'Other bed linen of Cotton' (HS 6302.3190) from $319 million (Jul–Mar FY25) to $288 million in FY26, and 'Bed covers of cotton mill-made' (HS 63023130) from $311 million to $299 million in the same period.

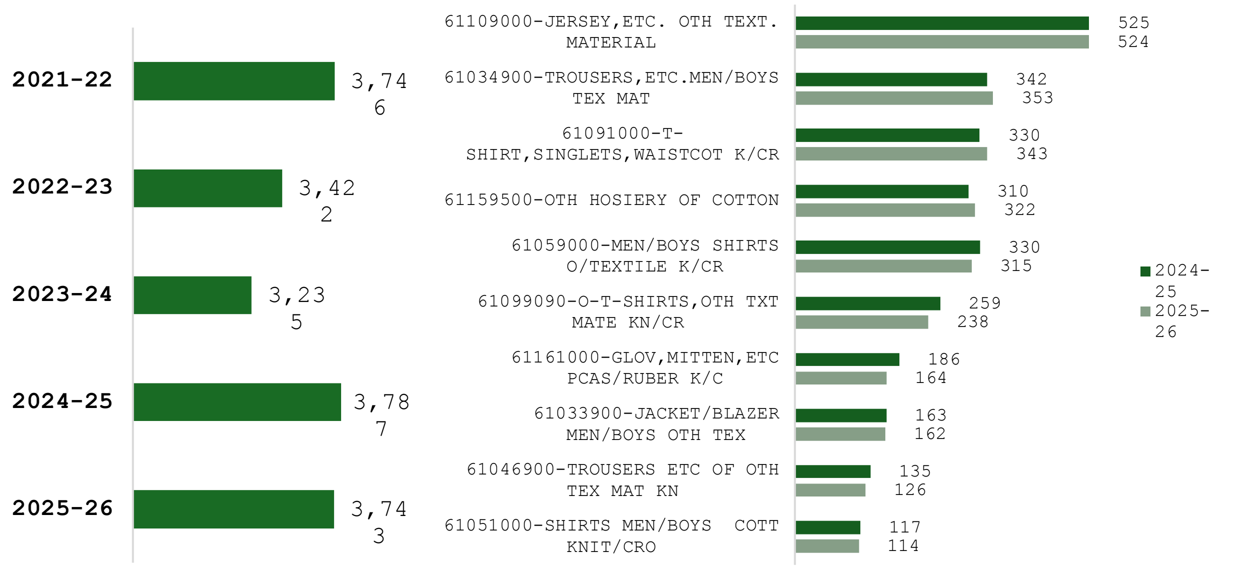
Fig 1.8 – Ch-63 Exports Trends (5 years) & Top 10 Export Items



(ii) Chapter 61 – 2nd Highest: Articles of Apparel, Accessories, Knit or Crochet

Chapter 61 exports show an overall increasing trend across the five-year period, peaking at $3,787 million in 2024–25 before marginally declining to $3,743 million in 2025–26 (-0.1%). Key declines include knitted T-shirts of other textile materials (HS 6109.9090) from $259 million to $238 million, and impregnated/coated gloves (HS 6116.1000) from $186 million to $164 million.

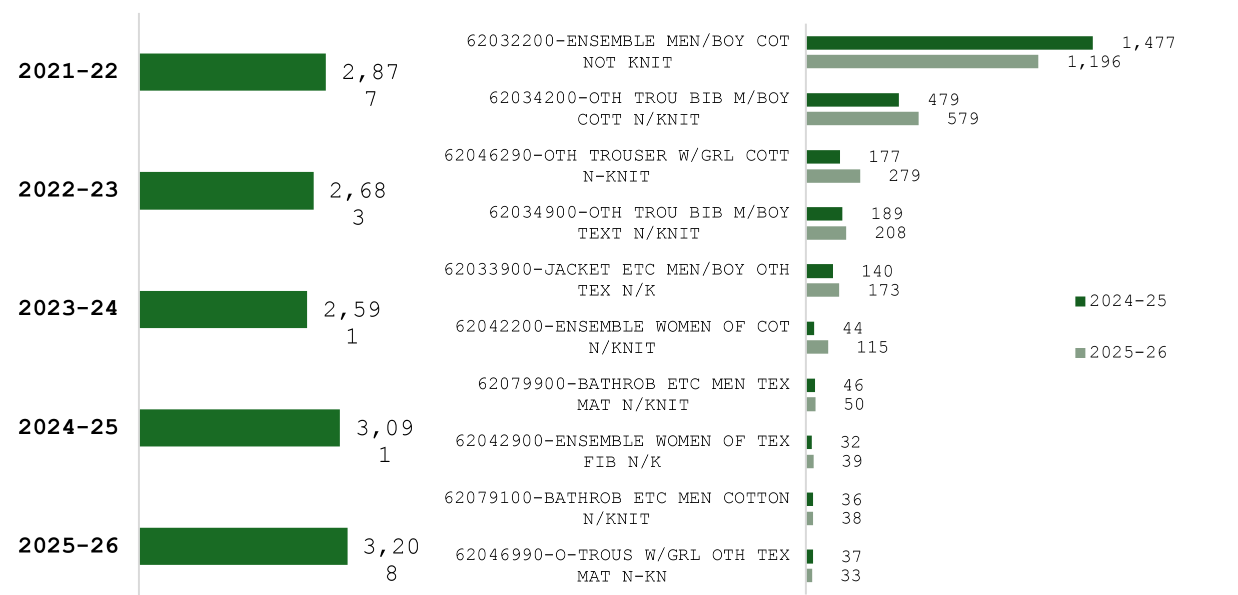
Fig 1.9 – Ch-61 Exports Trends (5 years) & Top 10 Export Items



(iii) Chapter 62 – 3rd Highest: Articles of Apparel, Not Knitted or Crocheted

Chapter 62 exports show the strongest growth trajectory, rising from $2,877 million in 2021–22 to $3,208 million in 2025–26, an increase of 15%. The highest exports were recorded in 2025–26 at $3,208 million. A notable decline was observed in cotton ensembles/suits (HS 6203.2200) from $1,350 million (Jul–Jan FY25) to $1,102 million in FY26.

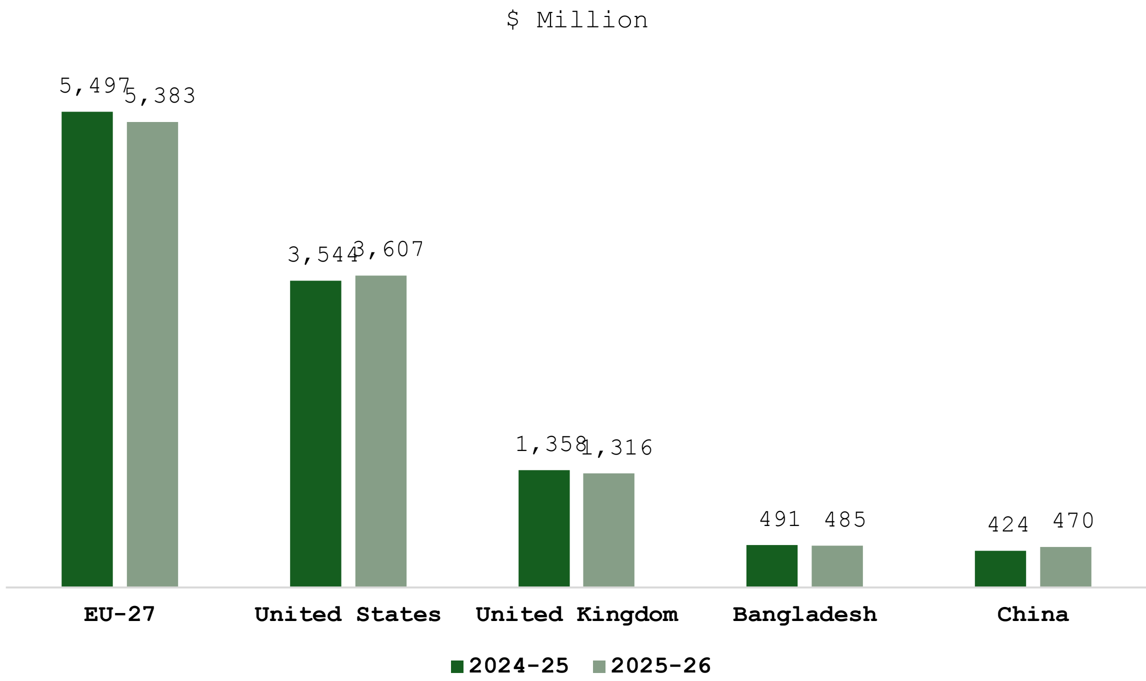
Fig 1.10 – Ch-62 Exports Trends (5 years) & Top 10 Export Items



1.4 Exports by Destination Country

Pakistan's top five textile and apparel export destinations showed broadly stable trends in 2025–26. The EU (27) was the largest market with exports of $5,383 million (slightly down from $5,497 million in FY25), followed by the United States at $3,607 million, the UK at $1,316 million, Bangladesh at $485 million, and China at $470 million.

Fig 1.11 – Top 5 Textile Export Destinations



A. European Union (27)

Pakistan's textile and apparel exports to the EU exhibited a fluctuating but broadly upward trajectory over the five-year period. After declining to $4,260 million in 2023–24, exports rebounded strongly to $4,939 million in 2024–25, easing slightly to $4,838 million in 2025–26 while remaining above earlier levels.

Fig 1.12 – Trend of Textile Exports to EU

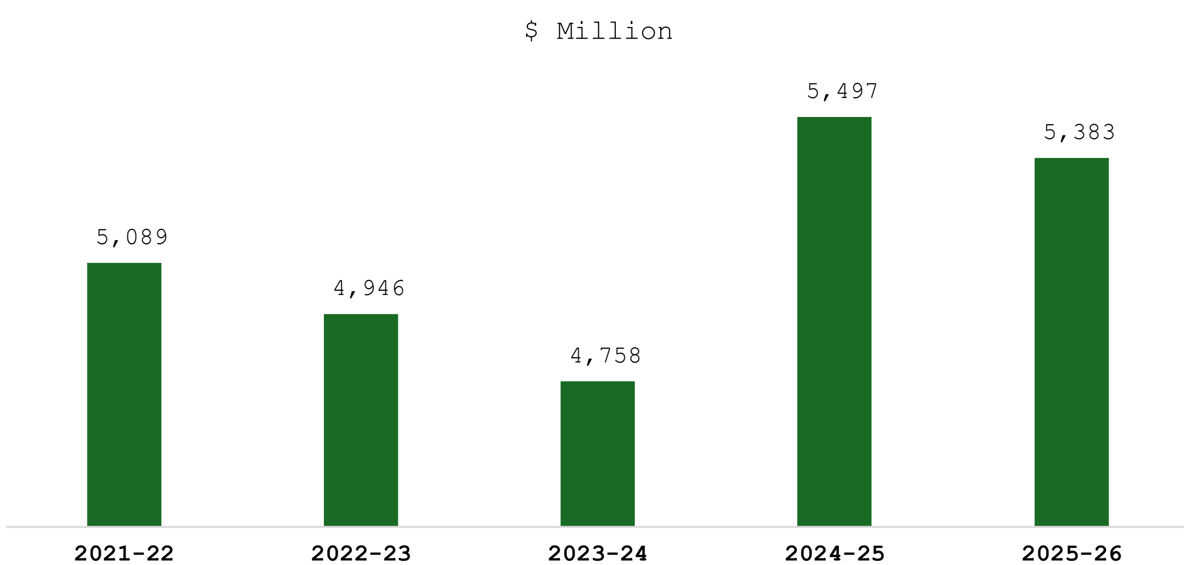


Table 1.3: Top 10 Exports to EU – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
1	62032200	Ensemble men/boy cot not knit	730	599	↓17.88%

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
2	63026010	Towels of cotton mill-made	325	317	↓2.58%
3	62034200	Oth trou bib m/boy cotton/knit	285	309	↑8.41%
4	63023110	Bed sheets of cotton mill-made	199	219	↑9.81%
5	63023130	Bed covers of cotton mill-made	222	216	↓2.39%
6	63023190	Oth bed linen of cotton	202	193	↓4.24%
7	61109000	Jersey, etc. Oth text. Material	194	178	↓8.26%
8	63021010	Bed sheets, knitted/crocheted	176	176	↓0.11%
9	61034900	Trousers, etc. men/boys, textile mat	170	166	↓1.82%
10	61159500	Oth hosiery of cotton	147	141	↓4.23%

B. United States

Pakistan's textile exports to the United States fluctuated over the five-year period. After peaking at $4,301 million in 2021–22, exports declined to $3,168 million in 2023–24 before recovering to $3,607 million in 2025–26. However, levels remain below the 2021–22 peak.

Fig 1.13 – Trend of Textile Exports to USA

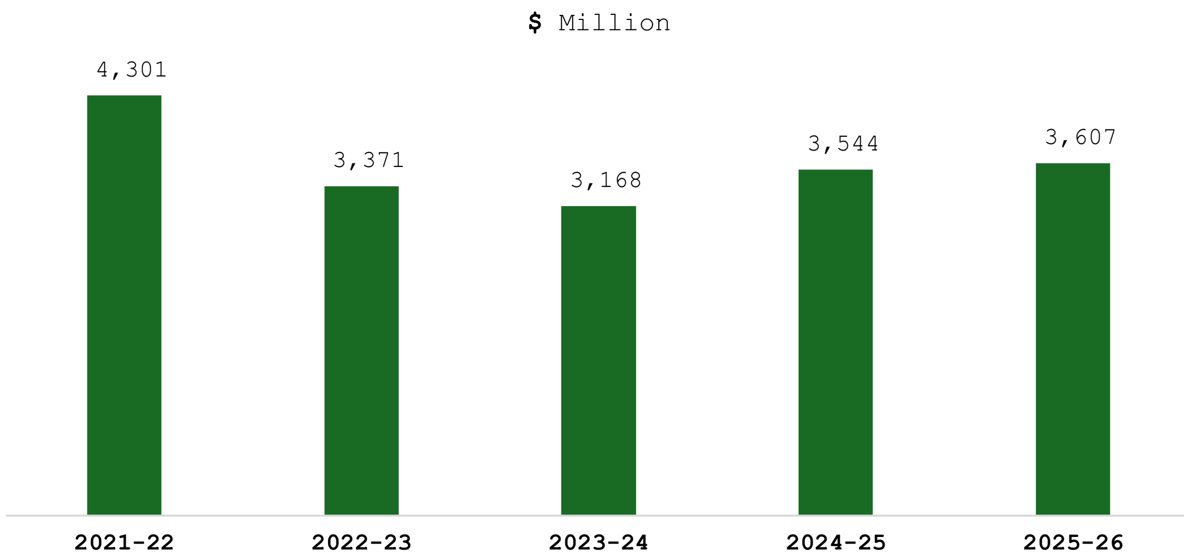


Table 1.4: Top 10 Exports to USA – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
1	62032200	Ensemble men/boy cot not knit	469	363	↓22.60%
2	63026010	Towels of cotton mill-made	257	269	↑4.68%
3	61109000	Jersey, etc. Oth text. Material	193	220	↑14.09%
4	62034200	Oth trou bib m/boy cott n/knit	105	146	↑38.84%
5	61099090	O-t-shirts, oth txt mate kn/cr	155	139	↓10.43%
6	61059000	Men/boys shirts o/textile k/cr	131	136	↑4.39%

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
7	61091000	T-shirt, singlets, waistcoat k/cr	115	125	↑8.85%
8	61159500	Oth hosiery of cotton	112	122	↑9.44%
9	63023110	Bed sheets of cotton mill-made	100	86	↓14.62%
10	63071020	Wash-cloth	99	79	↓20.28%

C. United Kingdom

Pakistan's textile exports to the UK declined from $1,338 million in 2021–22 to $1,181 million in 2022–23, followed by gradual recovery to $1,219 million in 2023–24 and a peak of $1,358 million in 2024–25. Exports moderated to $1,316 million in 2025–26, remaining broadly close to the 2021–22 benchmark.

Fig 1.14 – Trend of Textile Exports to UK

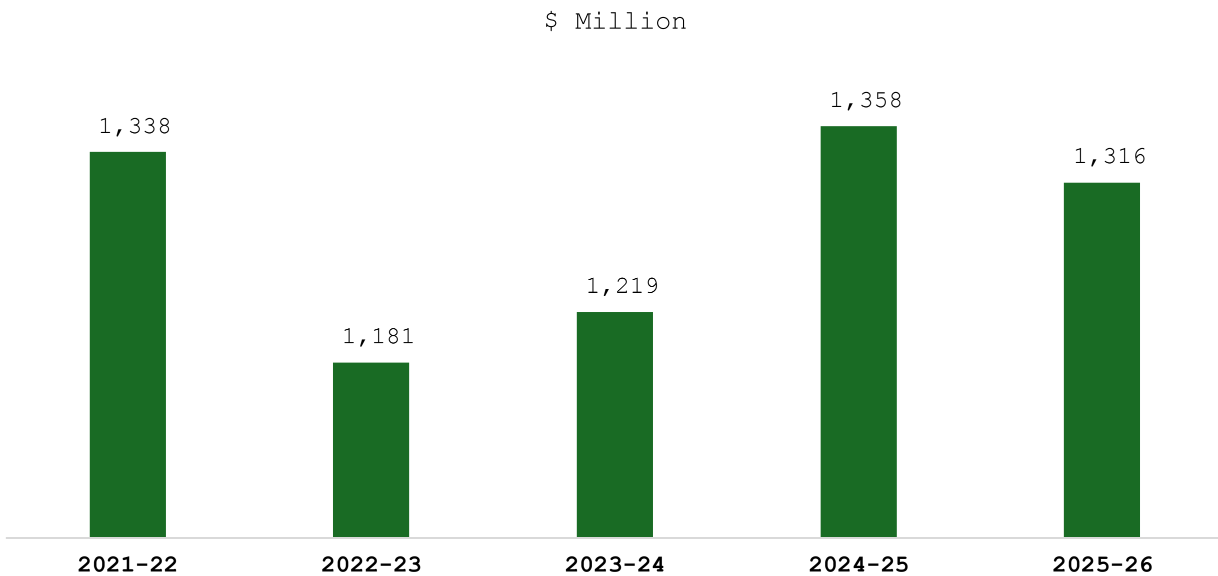


Table 1.5: Top 10 Exports to UK – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
1	62032200	Ensemble men/boy cot not knit	98	86	↓12.21%
2	61109000	Jersey, etc. Oth text. Material	88	78	↓11.10%
3	63026010	Towels of cotton mill-made	81	75	↓7.72%
4	63023920	Bed covers oth tex mat mill-made	61	59	↓2.36%
5	61034900	Trousers, etc. men/boys tex mat	55	57	↑3.34%
6	63023910	Bed sheets other tex mat handloom	56	55	↓1.98%
7	63023130	Bed covers of cotton mill-made	50	51	↑0.11%
8	61059000	Men/boys shirts o/textile k/cr	70	50	↓28.95%
9	63023110	Bed sheets of cotton mill-made	38	45	↑19.66%
10	63023190	Oth bed linen of cotton	45	33	↓25.85%

D. Bangladesh

Exports to Bangladesh show a declining trend from 2021–22 to 2023–24, with a slight pickup in 2024–25. The highest exports were recorded in 2021–22 at $544 million. In 2025–26 exports are at $485 million. Bangladesh primarily imports raw materials from Pakistan, notably cotton yarn and cotton fabric.

Fig 1.15 – Trend of Textile Exports to Bangladesh

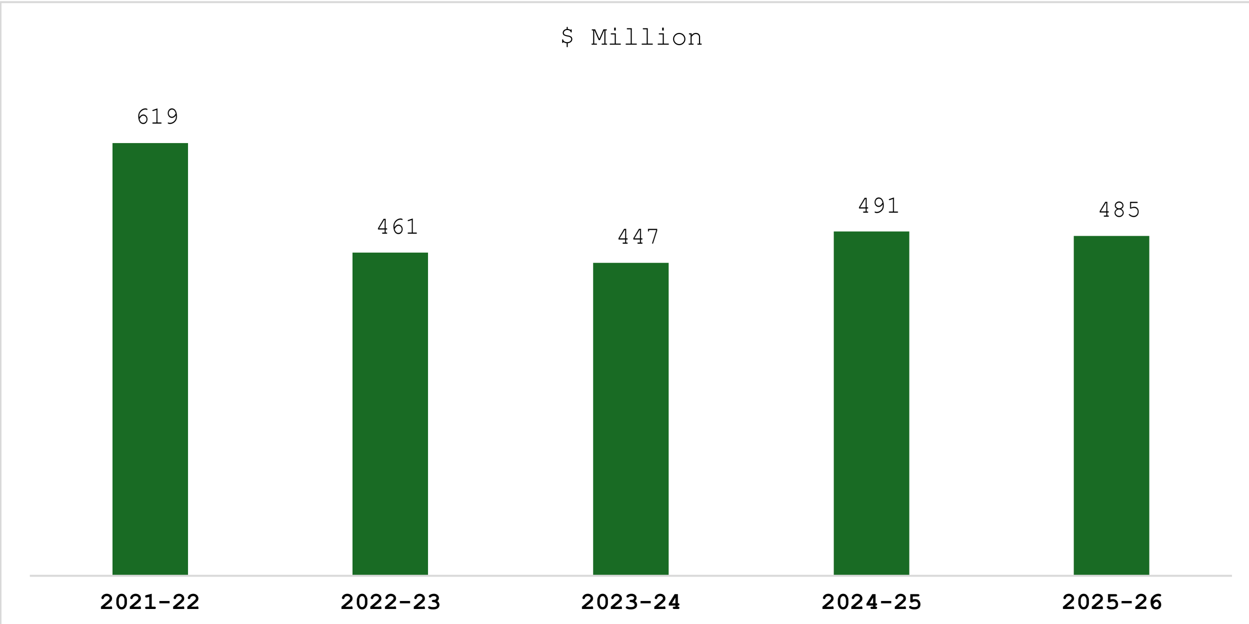


Table 1.6: Top 10 Exports to Bangladesh – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
1	52094200	Cotton wov fab denim >200g/sqm	246.2	264.8	↑7.56%
2	52114200	W-fab cot denim, mx mfw >200g/sqm	58.7	52.3	↓10.99%
3	52093200	Cotton woven fab dyed 3-4 thread	45.8	46.4	↑1.26%
4	52051200	S-cot. yarn ucf.d-232.56-714.29	24.9	22.0	↓11.74%
5	52051100	Sin.cot.yar.u.com.fib.d-714.29	24.3	15.7	↓35.36%
6	52092200	Cot woven fab 3/4thrd w >200g/sqm	8.5	8.0	↓4.99%
7	52122300	Oth cot woven fab dyed >200g/sqm	9.1	6.1	↓33.24%
8	52113200	Woven fab 3-4thread mix >200g dyed	4.3	4.4	↑2.08%
9	52093900	Oth cot woven fab dyed >200g/sqm	5.9	4.2	↓28.69%
10	52083900	Oth cotton woven fab <2000/sqm dye	5.1	1.4	↓72.26%

E. China

Exports of textiles from Pakistan to China show a mixed trend over the five-year period. The highest exports were recorded in 2023–24 at $674 million, while the lowest were in 2022–23 at $375 million. In 2025–26, exports stand at $470 million.

Fig 1.16 – Trend of Textile Exports to China

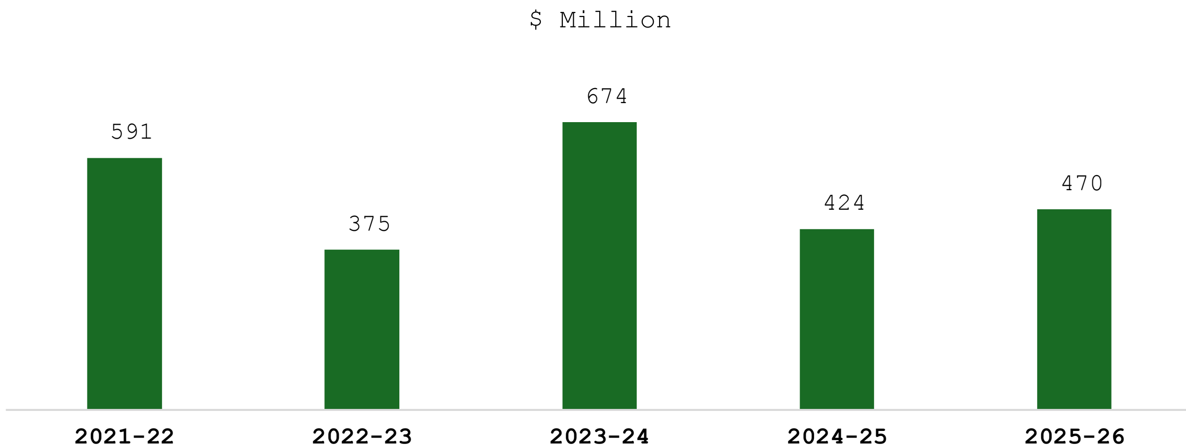


Table 1.7: Top 10 Exports to China – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2024-25	2025-26	% Change
1	52051100	Sin.cot.yar.u.com.fib.d-714.29	163.5	205.4	↑25.62%
2	52051200	S-cot. yarn ucf.d-232.56-714.29	184.2	190.5	↑3.42%
3	52081200	Woven fab cot wt >100g/sqm unblea	7.1	15.8	↑123.17%
4	61091000	T-shirt, singlets, waistcot k/cr	5.4	6.0	↑11.24%
5	52091200	Cotton woven fab 3-4thread un-bl	5.0	4.8	↓3.84%
6	61109000	Jersey, etc. Oth text. Material	6.4	3.3	↓49.33%
7	61159500	Oth hosiery of cotton	3.8	3.1	↓18.11%
8	61161000	Glove, mitten, etc pcas/ruber k/c	3.0	3.0	↑0.20%
9	62032200	Ensemble men/boy cot not knit	3.5	2.3	↓34.42%
10	61034900	Trousers, etc. men/boys tex mat	7.0	2.1	↓70.42%

2. POLICY INTERVENTIONS RECOMMENDED

- **Energy Pricing:** Reintroduce RCET for electricity and gas (target ~8.5 cents/kWh), remove gas levies, and ensure regionally competitive, predictable energy tariffs.
- **Tax Regime Rationalization:** FTR (1% turnover tax) to be restored for Exporters. Eliminate Super Tax and reduce Corporate Tax to 20%.
- **Investment Incentives (BMR & Expansion):** Restore accelerated depreciation (50% machinery, 25% buildings). Reinstate tax credits on investment in plant, machinery, and industrial infrastructure.
- **Sales Tax Reform:** Gradually reduce sales tax to 15%. Introduce graduated GST regime with taxation only at final consumption stage.
- **Liquidity & Refunds:** Ensure fast-track automated refunds (within 72 hours) to ease working capital constraints. Rationalize duty drawback rates. Launch DLTL (5%) for exporters.
- **Export Financing:** Double allocation for Export Refinance Scheme and enhance EFS/LTFF limits. Introduce concessional financing for green and sustainable investments.
- **Labor Cost Alignment:** Temporarily freeze minimum wages and reduce employers EOBI contributions to 2% to maintain regional competitiveness. Provincial govts to amend Labor laws to match the ones in force in Bangladesh.
- **Export Facilitation Scheme (EFS):** Maintain current coverage; avoid further exclusions and rationalize custom duties drawback rates on excluded items to reflect actual cost component of duties in price of that input.
- **Policy Stability:** Ensure a 5-year predictable textile/export policy framework with transparent KPI-based monitoring.
- **Restore zero rated regime for exporters.**

CONCLUSION

Pakistan's export performance in the period under analysis reflects a phase of contraction, with overall exports declining by 8% while textile and apparel exports show a marginal drop. Growth in value-added segments (Chapters 61–63) contrasts with a persistent decline in traditional textiles (Chapters 50–60), indicating a structural shift towards higher-value products but also exposing weaknesses in upstream sectors like yarn and fabrics.

Key markets remain stable but concentrated, increasing vulnerability to external shocks, while global uncertainties and cost pressures continue to weigh on competitiveness. The sector demonstrates recovery potential; however, sustained export growth will depend on urgent policy support focused on reducing energy and tax costs, improving financing access, strengthening upstream productivity, and enabling value-added diversification to enhance Pakistan's global market share.

ABOUT PAKISTAN TEXTILE COUNCIL

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- Generate employment and sustenance with decent work standards and gender equality, contributing to economic and social development.
- Make Pakistan's textile and apparel sector internationally competitive and globally compliant to spur exports and contribute to a stable, prosperous future.

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