



PAKISTAN
TEXTILE
COUNCIL

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Monthly Report of Pakistan's Textile & Apparel Exports

QR003

Prepared by: Pakistan Textile Council

12/17/25

Reference period: July-November 2025

EXECUTIVE SUMMARY

Pakistan's overall exports stood at \$12.84 billion during July–November FY26, showing a 6.4% decline compared to \$13.72 billion in the same period of FY25. In November 2025, exports were recorded at \$2.40 billion, reflecting a 15.2% year-on-year decrease from \$2.83 billion in November 2024. On a month-on-month basis, exports declined by 15.8%, falling from \$2.85 billion in October 2025 to \$2.40 billion in November 2025. Within this, the textile sector remained the dominant contributor, with exports reaching \$7.84 billion, representing a 2.8% growth over FY25 and accounting for approximately 61% of Pakistan's total exports. However, textile exports in November 2025 posted a 2.7% year-on-year decline, alongside an 11.7% month-on-month decrease.

Within textile and apparel exports, performance varied across product categories. Trend analysis of Chapters 50–60 (traditional textiles) continued to show a persistent decline, with exports falling from \$1,782 million in 2021–22 (July–November) to \$1,276 million in 2025–26. Declines were noted in CH-52 cotton (-8.66%), CH-54 man-made filaments (-17.6%), CH-56 wadding, felt and nonwovens (-2.01%), CH-57 carpets (-15.34%), CH- 60 – knitted fabrics (-31.08%), and CH-53 other vegetable textile fibers (-41.2 %), reflecting persistent weakness in conventional and raw material-based categories. In contrast, Chapters 61–63 (value-added textiles) increased from \$6,052 million in 2021–22 to \$6,559 million in 2025–26, reflecting a CAGR of around 2% over the period. Growth was driven by knitwear (+5.7%), non-knit apparel (+5.9%), and other made-up articles (+3.7%), which together posted a 5% increase in 2025–26.

Declining performance within top export product lines in value added clothing lines was also observed. In home textiles (Chapter 63), exports of cotton bed linen and bed covers recorded notable declines compared to last year. Similarly, in knitted apparel (Chapter 61), exports of knitted T-shirts and gloves weakened, while woven apparel (Chapter 62) saw a sharp fall in cotton men's suits, jackets, trousers, and related ensembles, declining significantly during July–November FY26. While the sector continues to demonstrate resilience through value-added exports, uncompetitive energy tariffs and rigid wage policies remain key constraints relative to regional peers.

Export destinations also displayed mixed trends. The European Union remained Pakistan's largest market, with exports rising to \$3.114 billion. Out of the top 10 export products to EU decline was observed in HS 62032200 Ensemble men/boy cot not knit (-14.93%), HS 61109000 Jersey, etc. Oth text. Material (-6.94%) and HS 63023130 Bed covers of cotton mill-made (-9.98%)., EU was followed by the United States at \$2.102 billion, where exports have remained broadly stable but below earlier peak levels. Out of the top 10 export products to US decline was observed in HS 62032200 Ensemble men/boy cot not knit (-22.5%), HS 61099090 Other T-Shirts, Other Textile Material- Knit (-13.6%) and HS 63071020 Wash cloth (-12.0%). The US was followed by the United Kingdom. The United Kingdom recorded exports of \$772 million,

reflecting a marginal increase. Out of the top 10 export products to UK decline was observed in HS 62032200 Ensemble men/boy cot not knit (-16.29%), HS 63026010 Towels of cotton mill-made (-7.83%), HS 61059000 Men/boys shirts made from other textile crocheted (-30.12%) and HS 63023190 Other bed linen of cotton (-13.66%).

UK was followed by Bangladesh and UAE. Bangladesh and the UAE reached \$277 million and \$272 million, respectively. Bangladesh's imports remain heavily concentrated in raw materials such as cotton yarn and fabrics, whereas the UAE market continues to exhibit volatility across apparel and fabric categories. Out of the top 10 exported items to Bangladesh decline was observed in HS 52114200 W-fab cot denim, mx mfw>200g/sqm (-0.26%), HS 52093200 Cotton wov fab dyed 3-4 thread (-11.97%), HS52051100 Sin.cot.yar.u.com.fib.d-714 (-12.61%), HS 52092200 Cotton woven fab 3/4thrd w>200g/sqm (-2.19%), HS 52122300 Other cotton woven fab dyed>200g/sqm (-6.07%), HS 52093900 Oth cot woven fab dyed>200g/sqm (-41.02%) and HS 52113200 Woven fab 3-4thread mix>200gdye (-27.88%). Out of the top 10 exported items to UAE decline was observed in HS 62032200 Ensemble men/boy cot not knit (-36.40%), HS 61109000 Jersey, etc of other text. Material (-8.52%), HS 55121900 Other woven fabrics of syn staple fiber (-34.54%) and HS 62041300 Suit women/girls of syn n/k (-46.73%).

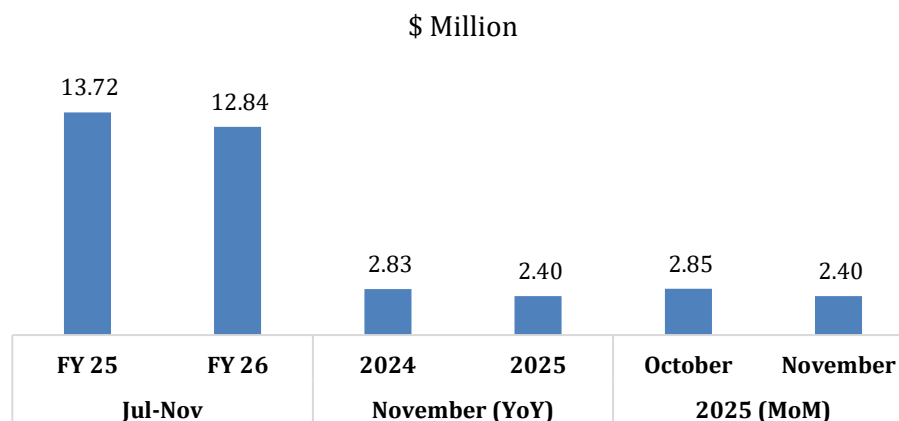
The report highlights that while Pakistan's textile exports are showing resilience and growth in value-added categories, persistent declines are being observed in cotton and other traditional textiles. Strategic emphasis on provision of regionally competitive energy prices and wage policies, rationalization 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.

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

1.1 OVERALL EXPORTS OF PAKISTAN

Pakistan's exports were recorded at \$12.84 billion during July–November FY26, showing a 6.4% decline compared to \$13.72 billion in the same period of FY25. In November 2025, exports stood at \$2.40 billion, reflecting a 15.7% year-on-year decrease from \$2.83 billion in November 2024. On a month-on-month basis, exports decreased by 15.8%, from \$2.85 billion in October 2024 to \$2.40 billion in October 2025 (see Fig-1.1).

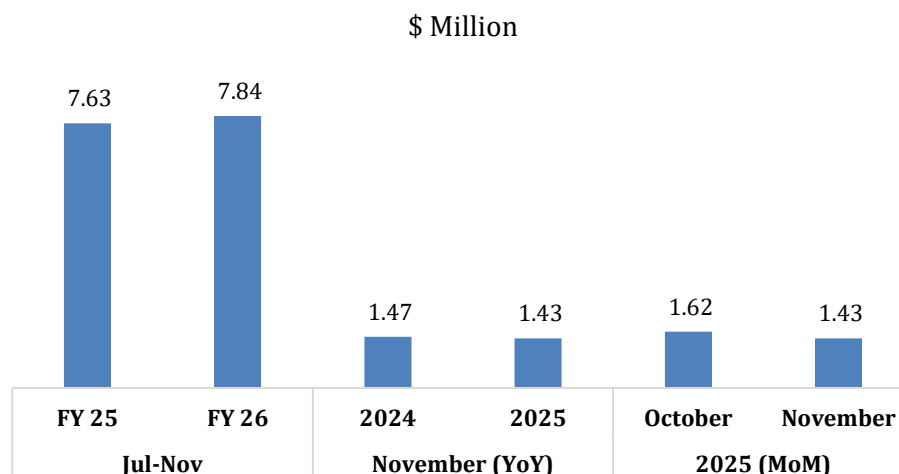
Fig-1.1: Total Exports Growth



1.2 OVERALL TEXTILE & APPAREL EXPORTS (50-63)

Pakistan's textile and apparel exports stood at \$7.84 billion during July–November FY26, reflecting an increase of 2.8% from \$7.63 billion in the same period of FY25. However, in November 2025 alone, exports were recorded at \$1.43 billion, reflecting a 2.7% year-on-year decline compared to November 2024 (\$1.47 billion) and a 11.7% month-on-month decrease from (\$1.62 billion) October 2025 (see Fig-1.2).

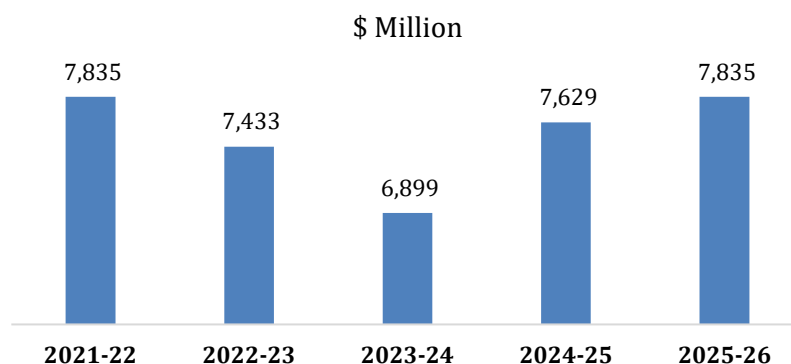
Fig-1.2: Total Textile & Apparel Exports



Trend Analysis

A temporary contraction followed by recovery is observed in Pakistan's textile and apparel exports over the last five years. Exports were recorded at \$7,835 million in 2021-22, followed by a slight decline to \$7,433 million in 2022-23. The sector experienced a more notable drop in 2023-24, when exports fell to \$6,899 million. However, the downward trend reversed thereafter, with exports rising sharply to \$7,629 million in 2024-25 and further strengthening to \$7,835 million in 2025-26, the highest level in the period under review (see Fig-1.3). This trajectory indicates a temporary slowdown in 2023-24 followed by two consecutive years of strong recovery.

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

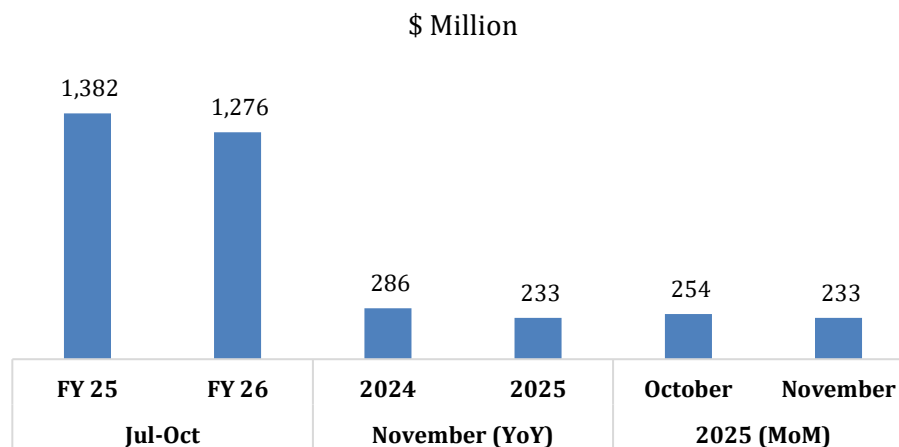


1.3 EXPORTS BY PRODUCT CATEGORY

1.3.1 TEXTILES (CH 50-60)

Pakistan's traditional textiles (comprising raw materials and semi-processed goods) exports stood at \$1,276 million during July-November FY26, reflecting a decline of 7.7% from \$1,382 million in the same period of FY25. In November 2025, exports were recorded at \$233 million, reflecting an 18.5% year-on-year decline compared to November 2024 (\$286 million). Similarly, a 8% month-on-month decrease was observed from (\$254 million) October 2025 (see Fig-1.4).

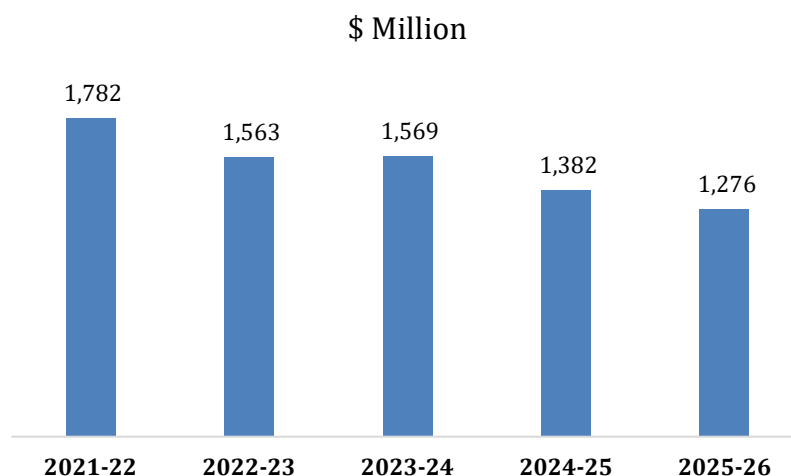
Fig-1.4: Textile & Apparel Exports



Trend Analysis

The exports of textiles from Pakistan under Chapters 50–60 show a consistent declining trend in the selected four months (July–November) over the five-year period. The highest export value was recorded in 2021–22 at \$1,782 million, after which exports gradually decreased to \$1,563 million in 2022–23 and \$1,569 million in 2023–24. The downward trajectory continued in 2024–25, with exports falling to \$1,382 million, and further declined to \$1,276 million in 2025–26, the lowest level in the period. Overall, exports dropped from \$1,782 million in 2021–22 to \$1,276 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-55 man-made staple fibers (\$152.6m, +2.77%), CH-58 special woven fabrics (\$19m, +27.2%), and CH-59 coated/impregnated fabrics (\$4m, +10.4%). However, declines were noted in CH-52 cotton (-8.66%), CH-54 man-made filaments (-17.6%), CH-56 wadding, felt and nonwovens (-2.01%), CH-57 carpets (-15.34%), CH- 60 – knitted fabrics (-31.08%), and CH-53 other vegetable textile fibers (-41.2 %), reflecting persistent weakness in conventional and raw material-based categories (see Table-1.1).

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

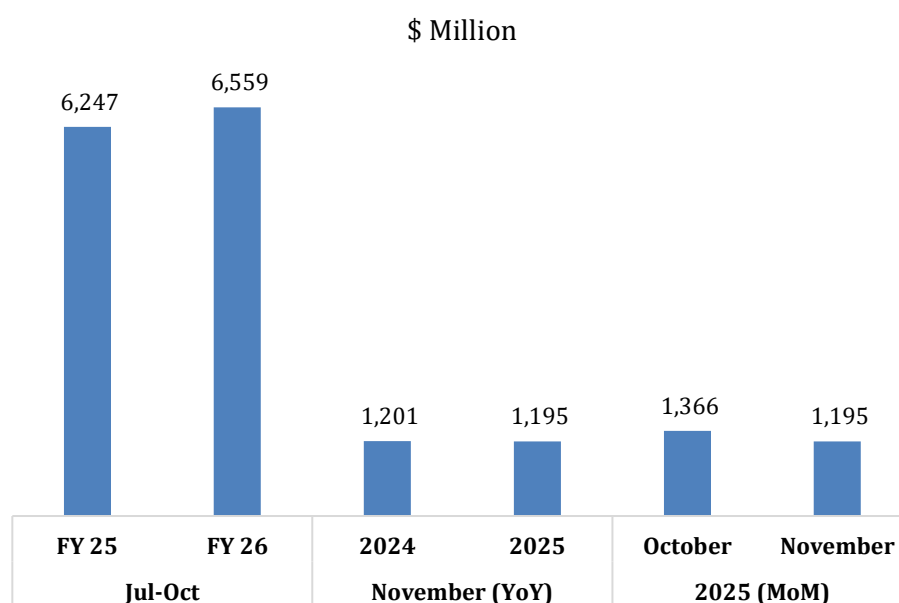
HS 2	Chapters	2024-25	2025-26	%Change
50	Silk	0.1	0.0	↓50.22%
51	Wool, fine or coarse animal hair; horsehair yarn and woven fabric	0.9	1.0	↑19.40%
52	Cotton	1,132.1	1,034.1	↓8.66%
53	Other vegetable textile fibers; paper yarn and woven fabrics of paper yarn	4.0	2.3	↓41.16%
54	Man-made filaments; strip and the like of man-made textile materials	29.4	24.2	↓17.61%

55	Man-made staple fibers	148.5	152.6	↑2.77%
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes and cables and articles thereof	4.7	4.6	↓2.01%
57	Carpets and other textile floor coverings	24.8	21.0	↓15.34%
58	Special woven fabrics; tufted textile fabrics; lace; tapestries; trimmings; embroidery	14.9	19.0	↑27.16%
59	Impregnated, coated, covered or laminated textile fabrics; textile articles of a kind suitable ...	3.6	4.0	↑10.43%
60	Knitted or crocheted fabrics	19.0	13.1	↓31.08%
Total		1,381.9	1,275.9	↓7.67%

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

Pakistan's Apparel and Made-up textiles exports stood at \$6,559 million during July–November FY26, reflecting an increase of 5% from \$6,247 million in the same period of FY25. However, in November 2025 alone, exports were recorded at \$1,195 million, reflecting a 0.5% year-on-year decline compared to November 2024 (\$1,201 million) and a 13% month-on-month decline from (\$1,366 million) October 2025 (see Fig-1.6).

Fig-1.6: Apparel and Made-up textiles Exports

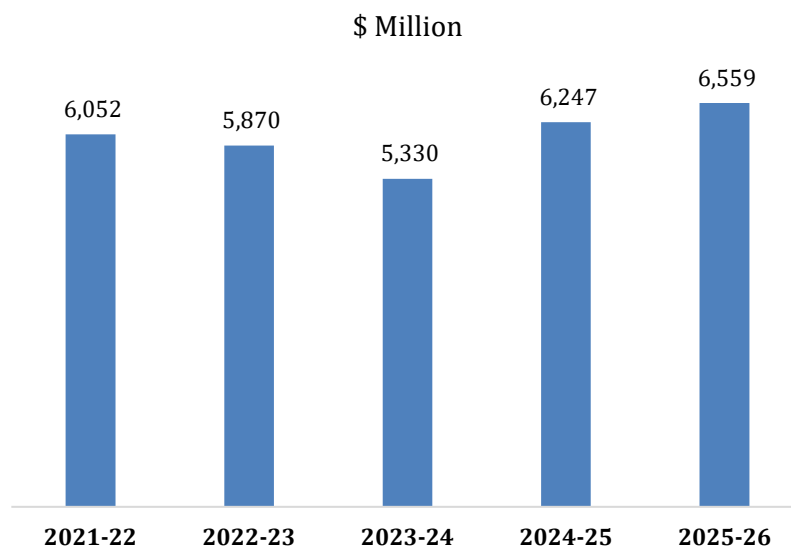


Trend Analysis

The exports of Pakistan under Chapters 61–63 show an overall increasing trend over the five-year period, despite some fluctuations. Exports declined from USD 6,052 million in 2021–22 to USD 5,870 million in 2022–23, and fell further to USD 5,330 million in 2023–24, marking the lowest point in the series. This was followed by a recovery, with exports increasing to USD 6,247 million in 2024–25 and rising further to USD 6,559 million in 2025–26, the highest level

recorded over the period. Overall, exports increased from \$6,052 million in 2021–22 to \$6,559 million in 2025–26, reflecting a CAGR of 2% over the period.

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 (\$2,29m, +5.7%), Chapter 62 – non-knit apparel (\$1,787m, +5.9%), and Chapter 63 – other made-up articles (\$2,473m, +3.7%). Together, these value-added segments collectively increased from \$6,247 million in 2024–25 to \$6,559 million in 2025–26, reflecting an overall growth of 5%, 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

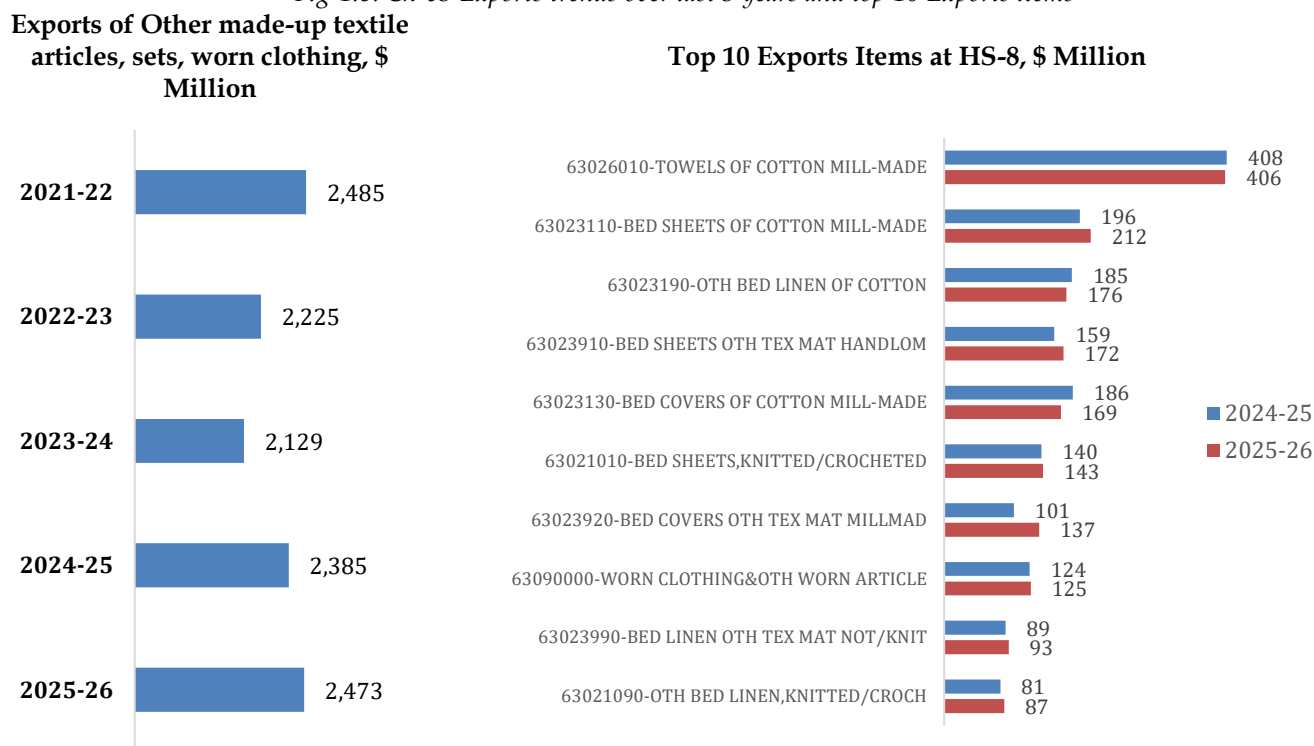
HS 2	Chapters	2024-25	2025-26	%Change
61	Articles of apparel, accessories, knit or crochet	2,174	2,299	↑5.7%
62	Articles of apparel and clothing accessories, not knitted or crocheted	1,688	1,787	↑5.9%
63	Other made-up textile articles, sets, worn clothing etc	2,385	2,473	↑3.7%
Total		6,247	6,559	↑5.0%

1.3.2a HIGHEST EXPORTED CATEGORY - CHAPTER 63 - OTHER MADE-UP 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 \$2,485 million. Overall, exports decline from \$2,485 million in 2021–22 to \$2,473 million in 2025–26. Individually out of the top 10 exported items in Chapter 63: major declined was recorded in “HS 6302.3190 Other bed linen of Cotton” from \$185 million (Jul-

Nov FY 25) to \$176 million in FY26, and “HS 63023130-bed covers of cotton mill-made” from \$186 million (Jul-Nov FY 25) to \$169 million in FY 26 in the same period.

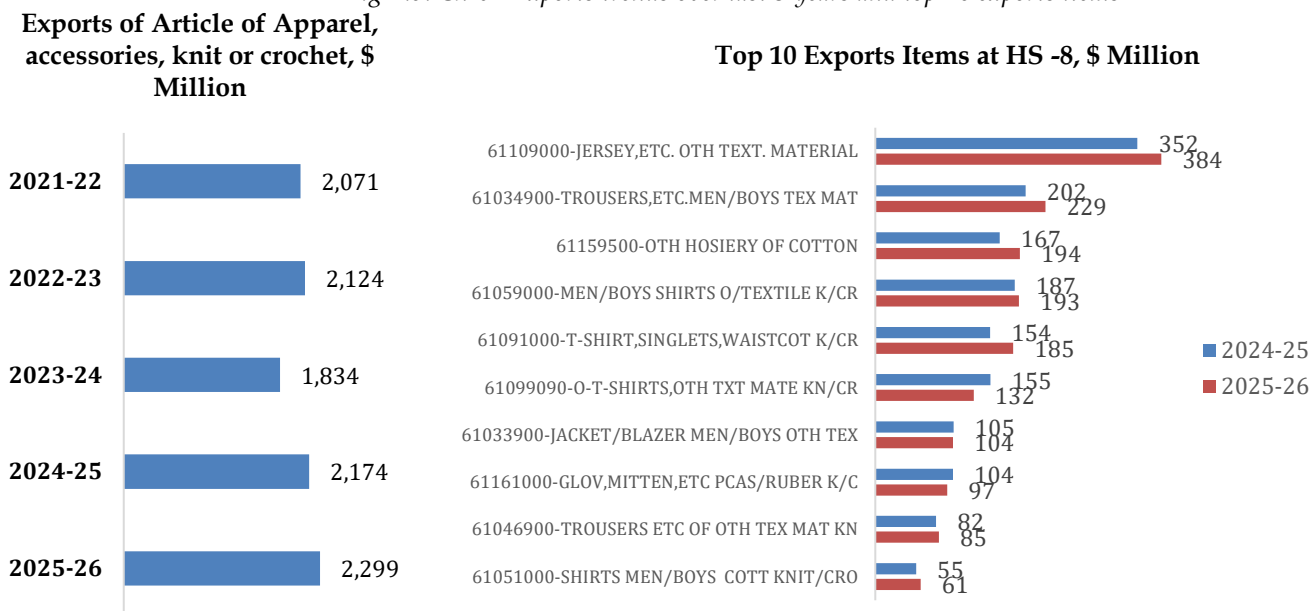
Fig-1.8: Ch-63 Exports trends over last 5 years and top 10 Exports items



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 \$2,299 million. Overall, exports grew from \$2,071 million in 2021–22 to \$2,299 million in 2025–26, reflecting an increase of 11%. 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”, a category that includes fibers like bamboo, hemp, linen, ramie, lyocell, and jute (HS 6109.9090)” declined from \$155 million (July- November 2024-25) to \$132 million in FY 2025-26 and “Knitted or crocheted gloves, mittens, and mitts that are impregnated, coated, or covered with plastics or rubber, specifically including working gloves, industrial gloves, and some types of sport and boxing gloves (HS 6116.1000)” declined from \$104 million (July-November 2024-25) to \$97 million in FY 2025-26.

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



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 \$1,787 million. Overall, exports rose from \$1,496 million in 2021-22 to \$1,787 million in 2025-26, reflecting an increase of 19%. 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 \$872 million (July- November 2024-25) to \$714 million in FY 2025-26.

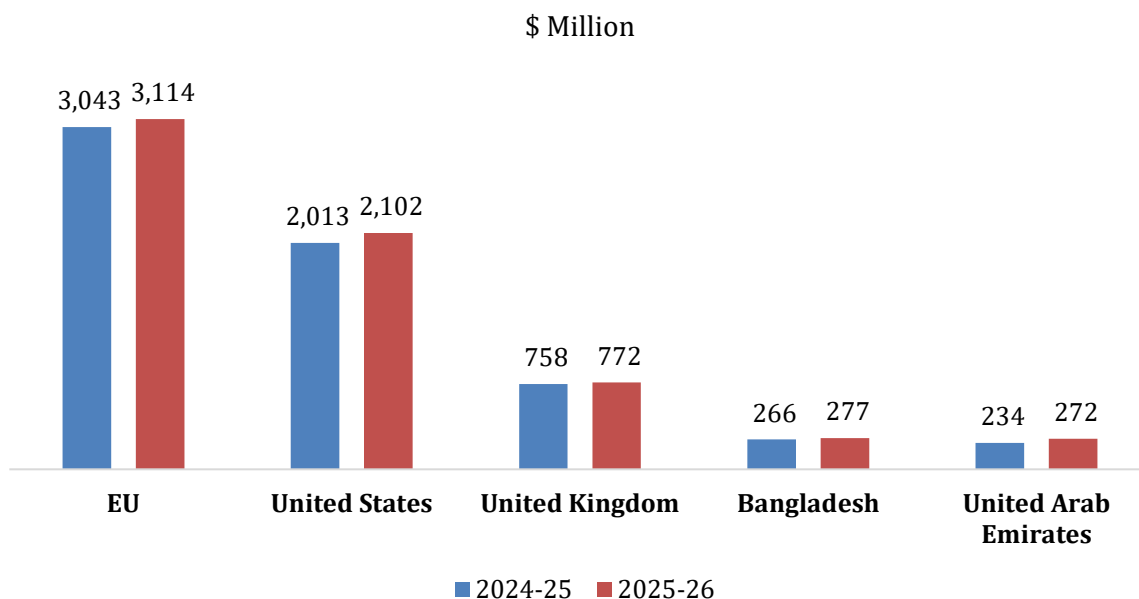
Fig-1.10: Ch-62 Exports trends over last 5 years and top 10 Exports items



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 rising from \$3,043 (Jul-Nov FY 25) million to \$3,114 million (Jul-Nov FY 26), followed by the United States at \$2,102 million, the UK at \$772 million, Bangladesh \$277 million and the UAE with \$272 million in FY 26.

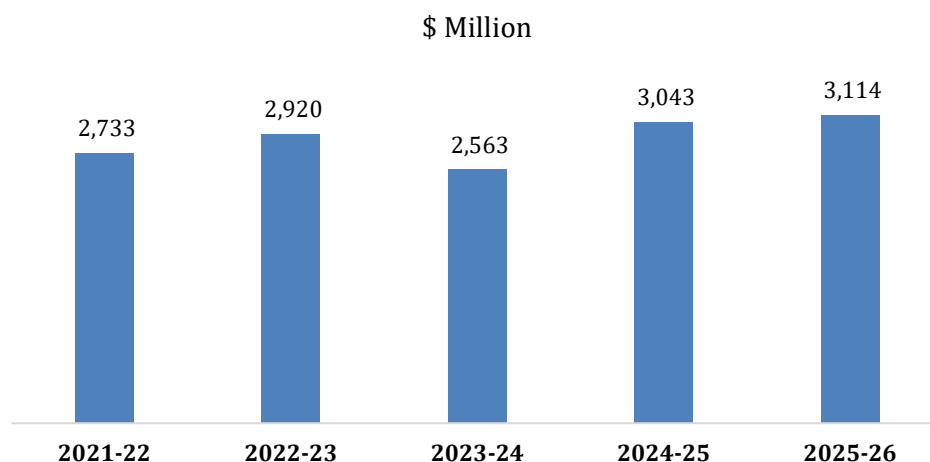
Fig-1.11: Top 05 Textile Exports Destinations



1.4.1 EUROPEAN UNION (27)

The exports of textiles and apparel from Pakistan to the EU show generally a stable trend over the five-year period. Exports to EU were \$2,733 million in 2021-22 and are at \$3,114 million in 2025-26.

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. Out of the top 10 export products to EU decline was observed in HS 62032200 Ensemble men/boy cot not knit (-14.93%), HS 61109000 Jersey, etc. Oth text. Material (-6.94%) and HS 63023130 Bed covers of cotton mill-made (-9.98%).

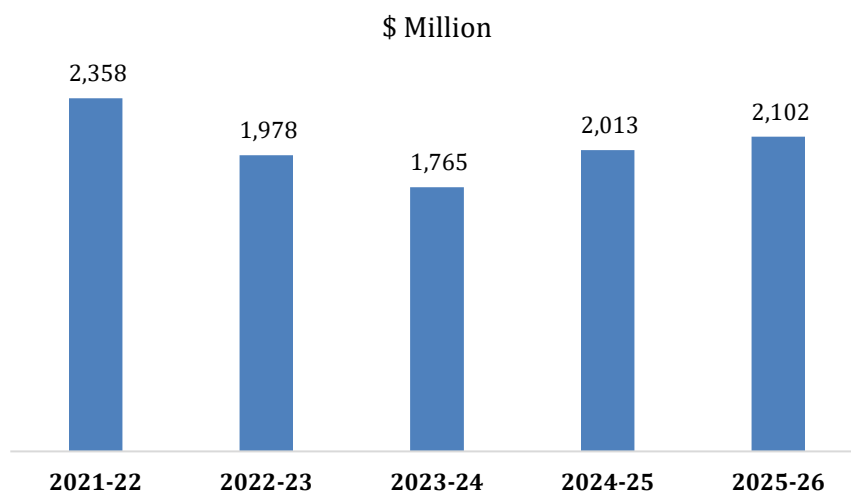
Table-1.3: Top 10 exports to EU – HS 8 level

Values in USD Million					
Sr.#	HS-8	Top 10 Products	2024-25	2025-26	%Change
1.	62032200	Ensemble men/boy cot not knit	427	363	↓14.93%
2.	63026010	Towels of cotton mill-made	161	162	↑0.29%
3.	62034200	Oth trou bib m/boy cott n/knit	138	158	↑14.02%
4.	61109000	Jersey, etc. Oth text. Material	144	134	↓6.94%
5.	63023110	Bed sheets of cotton mill-made	109	120	↑9.59%
6.	63023130	Bed covers of cotton mill-made	132	119	↓9.98%
7.	63023190	Oth bed linen of cotton	112	116	↑3.96%
8.	63021010	Bed sheets, knitted/crocheted	99	101	↑2.10%
9.	61034900	Trousers, etc. men/boys tex mat	91	101	↑10.35%
10.	61159500	Oth hosiery of cotton	80	85	↑5.35%

1.4.2 UNITED STATES

The exports of textiles from Pakistan to the United States show a generally stable trend over the five-year period. The highest exports were recorded in 2021–22 at \$2,358 million. Overall, exports declined from USD 2,358 million in 2021–22 to USD 2,102 million in 2025–26, indicating a contraction over the period.

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. Out of the top 10 export products to US decline was observed in HS 62032200 Ensemble men/boy cot not knit (-22.5%), HS 61099090 Other T-Shirts, Other Textile Material- Knit (-13.6%) and HS 63071020 Wash cloth (-12.0%).

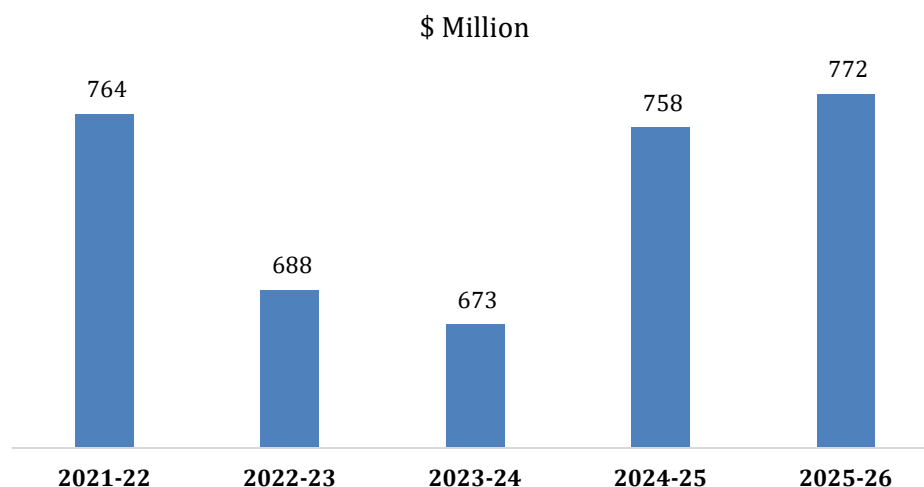
Table-1.4: Top 10 exports to USA – HS 8 level

Values in USD Million					
Sr.#	HS-8	Top 10 Products	2024-25	2025-26	%Change
1.	62032200	Ensemble Men/Boy Cotton (Not Knit)	277.55	214.98	↓22.5%
2.	61109000	Jersey, etc. Other Textile Material	118.06	159.29	↑34.9%
3.	63026010	Towels of Cotton (Mill-Made)	149.58	152.49	↑1.9%
4.	61059000	Men/Boys Shirts of Textile (Knit/Crochet)	70.08	78.86	↑12.5%
5.	61099090	Other T-Shirts, Other Textile Material (Knit)	90.89	78.54	↓13.6%
6.	62034200	Other Trouser Bib Men/Boy Cotton (Not Knit)	52.67	76.89	↑46.0%
7.	61159500	Other Hosiery of Cotton	58.62	73.67	↑25.7%
8.	61091000	T-Shirts, Singlets, Waistcoats (Knit/Crochet)	58.93	72.32	↑22.7%
9.	61034900	Trousers etc. Men/Boys Textile Material	51.28	69.30	↑35.1%
10.	63071020	Wash Cloth	53.36	46.94	↓12.0%

1.4.3 UNITED KINGDOM

The textile exports of Pakistan to the United Kingdom show an overall increasing trend across the five-year period. The highest exports were recorded in 2025-26 at \$772 million. Overall, exports rose from \$764 million in 2021-22 to \$772 million in 2025-26, reflecting a marginal increase during the period.

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. Out of the top 10 export products to UK decline was observed in HS 62032200 Ensemble men/boy cot not knit (-16.29%), HS 63026010 Towels of cotton mill-made (-7.83%), HS 61059000 Men/boys shirts made from other textile crocheted (-30.12%) and HS 63023190 Other bed linen of cotton (-13.66%).

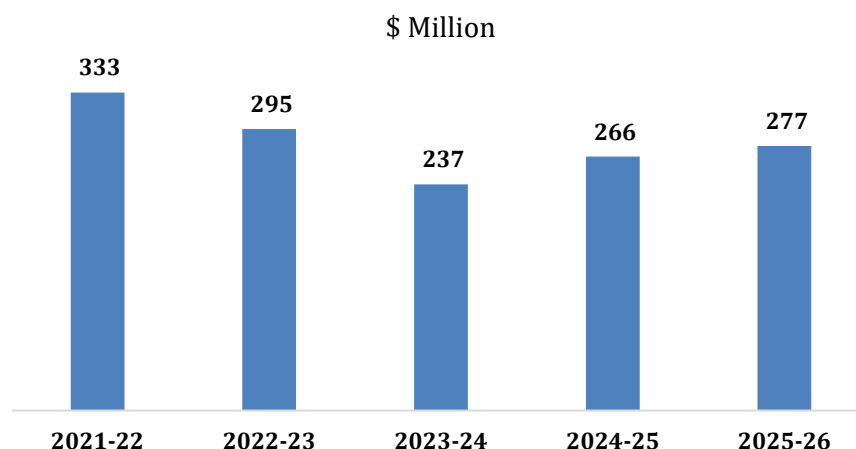
Table-1.5: Top 10 exports to UK – HS 8 level

Values in USD Million					
Sr. #	HS-8	Top 10 Products	2024-25	2025-26	%Change
1.	61109000	Jersey, etc. Oth text. Material	53	56	↑4.40%
2.	62032200	Ensemble men/boy cot not knit	60	50	↓16.29%
3.	63026010	Towels of cotton mill-made	41	38	↓7.83%
4.	63023920	Bed covers other textile mat mill-made	34	37	↑7.02%
5.	61034900	Trousers, etc. men/boy's textile material	32	35	↑10.48%
6.	63023130	Bed covers of cotton mill-made	31	32	↑2.56%
7.	63023910	Bed sheets other textile mat handloom	32	32	↑0.22%
8.	63023110	Bed sheets of cotton mill-made	22	28	↑28.41%
9.	61059000	Men/boys shirts made from other textile crocheted	39	27	↓30.12%
10.	63023190	Oth bed linen of cotton	26	23	↓13.66%

1.4.4 BANGLADESH

The exports of Pakistan to Bangladesh show declining trend from 2021-22 to 2023-24 and then slight pickup in 2024-25 and 2025-26. The highest exports were recorded in 2021-22 at \$333 million. In 2025-26 the exports are now \$277 million

Fig-1.15: Trend of Textile Exports to Bangladesh



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. Out of the top 10 exported items to Bangladesh decline was observed in HS 52114200 W-fab cot denim, mx mfw>200g/sqm (-0.26%), HS 52093200 Cotton wov fab dyed 3-4 thread (-11.97%), HS52051100 Sin.cot.yar.u.com.fib.d-714 (-12.61%), HS 52092200 Cotton woven fab 3/4thrd w>200g/sqm (-2.19%), HS 52122300 Other cotton woven fab dyed>200g/sqm (-6.07%), HS 52093900 Oth cot woven fab dyed>200g/sqm (-41.02%) and HS 52113200 Woven fab 3-4thread mix>200gdyed (-27.88%).

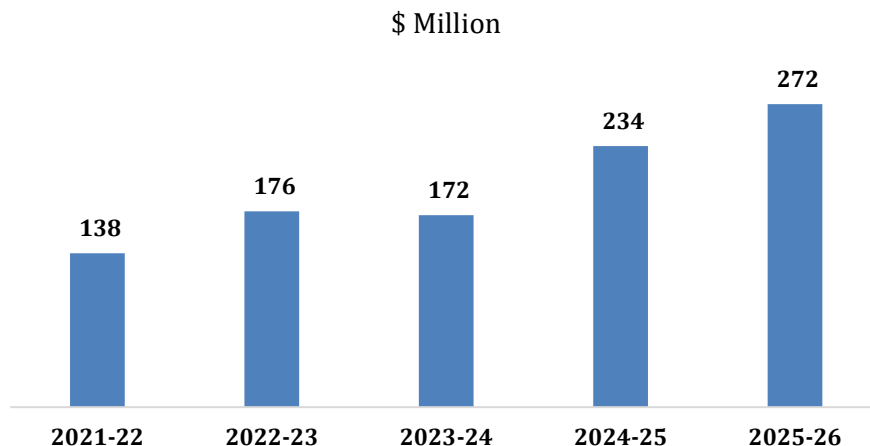
Table-1.6: Top 10 exports to Bangladesh – HS 8 level

Values in USD Million					
Sr. #	HS -8	Top 10 Products	2024-25	2025-26	%Change
1.	52094200	Cotton woven fab denim>200g/sqm	128.1	148.0	↑15.55%
2.	52114200	W-fab cot denim, mx mfw>200g/sqm	30.0	29.9	↓0.26%
3.	52093200	Cotton wov fab dyed 3-4 thread	28.9	25.5	↓11.97%
4.	52051200	S-cot. yarn ucf.d-232.56-714.29	14.5	15.0	↑3.82%
5.	52051100	Sin.cot.yar.u.com.fib.d-714.29	11.9	10.4	↓12.61%
6.	52092200	Cotton woven fab 3/4thrd w>200g/sqm	4.9	4.8	↓2.19%
7.	52122300	Other cotton woven fab dyed>200g/sqm	4.7	4.4	↓6.07%
8.	52051300	S-cotton. yarn ucf.d-192.31-232.56	2.4	2.9	↑20.99%
9.	52093900	Oth cot woven fab dyed>200g/sqm	4.5	2.6	↓41.02%
10.	52113200	Woven fab 3-4thread mix>200gdyed	2.9	2.1	↓27.88%

1.4.5 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 \$272 million, while the lowest were recorded in 2021-22 at \$138 million.

Fig-1.16: Trend of Textile Exports to UAE



Top 10 Exports to UAE

The following table presents the top 10 exports to the UAE, indicating whether they show an increasing or decreasing trend. Out of the top 10 exported items to UAE decline was observed in HS 62032200 Ensemble men/boy cot not knit (-36.40%), HS 61109000 Jersey, etc of other text. Material (-8.52%), HS 55121900 Other woven fabrics of syn staple fiber (-34.54%) and HS 62041300 Suit women/ girls of syn n/k (-46.73%).

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	36.8	23.4	↓36.40%
2.	62033900	Jacket etc men/boy oth tex n/k	6.6	18.7	↑183.11%
3.	62034200	Oth trou bib m/boy cott n/knit	7.0	15.4	↑118.38%
4.	61109000	Jersey,etc. Oth text. Material	13.6	12.4	↓8.52%
5.	61034900	Trousers,etc.men/boys tex mat	7.6	8.8	↑16.74%
6.	63026010	Towels of cotton mill-made	8.1	8.5	↑4.53%
7.	55121900	Oth wov fab of syn staple fib	8.4	5.5	↓34.54%
8.	61059000	Men/boys shirts o/textile k/cr	3.3	5.5	↑64.73%
9.	61046900	Trousers etc of oth tex mat kn	5.0	5.0	↑0.10%
10.	62041300	Suit women/grl of syn n/k	5.9	3.1	↓46.73%

2. POLICY INTERVENTIONS RECOMMENDED

- **Energy cost certainty:** Ensure export-focused industries have access to regionally competitive and stable energy tariffs that allow long-term planning and price competitiveness.
- **Cash flow & tax simplification:** Ease liquidity pressures by lowering tax incidence, enabling fully automated refunds within 72 hours through risk-based post-audit, and maintaining zero-rating of inputs under the Export Facilitation Scheme.
- **Labour cost alignment:** Rationalise wage structures and overtime rules in line with benchmark competitors (such as Bangladesh) to restore labour-cost competitiveness.
- **Value-added exports (HS 61–63):** Introduce a time-bound, performance-linked export incentive focused on incremental value addition and adherence to SDG and ESG standards.
- **Upstream sector revival (HS 50–60):** Implement deep-rooted reforms to enhance cotton quality and productivity, while lowering operating costs for the spinning and weaving segments.
- **Access to finance:** Reinforce EXIM Bank's role, expand EFS and LTFF limits, and roll out targeted financing for innovation, renewable energy, sustainability, and green investments.
- **Policy continuity & credibility:** Adopt a legally protected five-year industrial and export policy framework, eliminate ad-hoc SROs, and ensure transparent execution through monthly publication of performance indicators.

CONCLUSION

The analysis underscores a widening divergence within Pakistan's export landscape: while overall exports have contracted and traditional textile categories (HS 50–60) continue to face sustained decline, the textile and apparel sector remains the backbone of export performance, driven primarily by resilience in value-added segments (HS 61–63). However, emerging weaknesses within key apparel product lines and softening demand across top 05 markets including the EU, US, UK, Bangladesh and UAE are signaling that recent growth momentum is fragile and increasingly constrained by structural domestic factors rather than external demand alone. Persistently uncompetitive energy tariffs, rigid wage policies, tax frictions, and limited access to affordable financing are eroding Pakistan's cost competitiveness vis-à-vis regional peers, while upstream weaknesses in cotton quality and productivity continue to undermine the value chain. To arrest the decline in traditional textiles, sustain value-added growth, and regain lost global market share, the report concludes that a coherent, time-bound reform agenda—centered on regionally competitive energy pricing, labour and tax rationalization, targeted support for value addition and upstream revival, strengthened export financing, and a stable long term policy framework with transparent monitoring is essential to restore export momentum and place Pakistan's textile and apparel sector on a durable growth trajectory.

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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