PAKISTAN TEXTILE COUNCIL

Empowering Pakistan's Textile Sector

Quarterly Report

Pakistan's Textile & Apparel Exports

Reference Period: July – September 2026 (3M FY27)

Prepared by: Pakistan Textile Council

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EXECUTIVE SUMMARY

Pakistan's exports were recorded at $8.45 billion during July–September FY27, showing an 11.1% increase compared to $7.60 billion in the same period of FY26. In September 2026, exports stood at $2.96 billion, registering an increase of 18.5% year-on-year from $2.50 billion in September 2025 and 16.9% month-on-month from $2.53 billion in August 2026.

The textile and apparel sector (Chapters 50–63) remained the dominant contributor, with exports reaching $4.97 billion during July–September FY27, reflecting an increase of 6.1% from $4.68 billion in the same period of FY26 and accounting for approximately 59% of Pakistan's total exports. In September 2026 alone, exports were recorded at $1.65 billion, reflecting a 7% year-on-year increase compared to September 2025 ($1.54 billion) and a 6% month-on-month increase from $1.55 billion in August 2026.

Within textile and apparel exports, performance continued to vary across product categories. Traditional textiles (Chapters 50–60) recorded exports of $806 million in July–September FY27, reflecting a 2.1% increase from $789 million in the same period of FY26. Meanwhile, value-added textiles (Chapters 61–63) increased to $4.17 billion, up from $3.90 billion, reflecting around 7.0% growth. This growth was primarily driven by non-knit apparel (Chapter 62, +16.2%), other made-up articles (Chapter 63, +2.6%) and knitwear (Chapter 61, +4.5%) underscoring the continued importance of value-added textile segments in sustaining overall export growth.

Export destinations showed broadly stable trends. The European Union (27) remained the largest market with exports of $1,954 million, followed by the United States ($1,451 million), the United Kingdom ($501 million), China ($185 million), and Bangladesh ($160 million) during July–September FY27. 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 sustaining 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

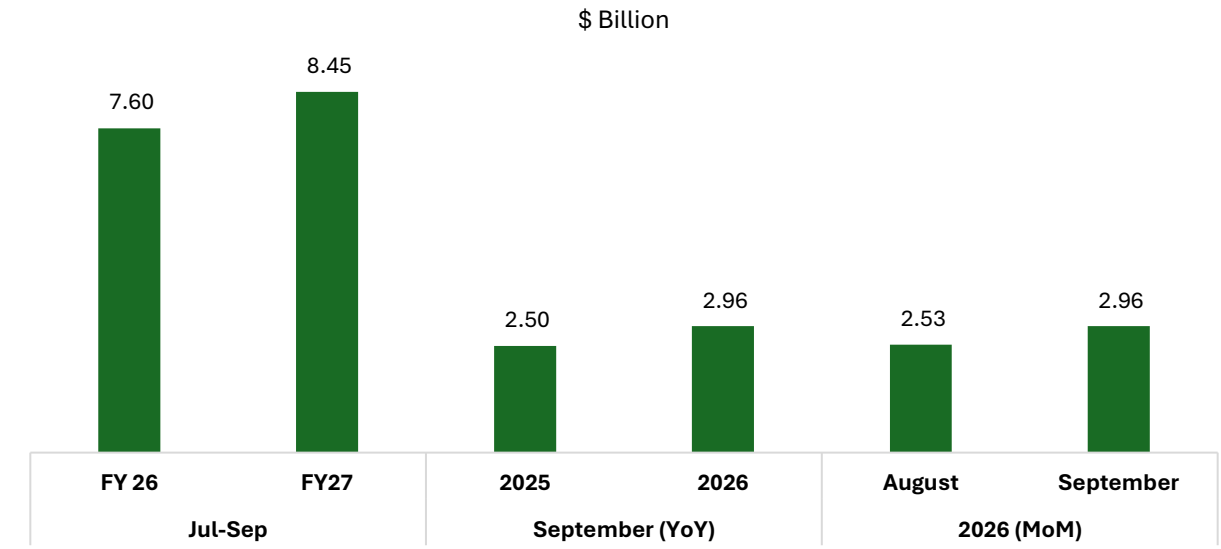


1. EXPORTS ANALYSIS OF TEXTILE & APPAREL (Chapters 50–63)

1.1 Overall Exports of Pakistan

Pakistan's exports were recorded at $8.45 billion during July–September FY27, showing an 11.1% increase compared to $7.60 billion in the same period of FY26. In September 2026, exports stood at $2.96 billion, registering an increase of 18.5% year-on-year from $2.50 billion in September 2025 and 16.9% month-on-month from $2.53 billion in August 2026.

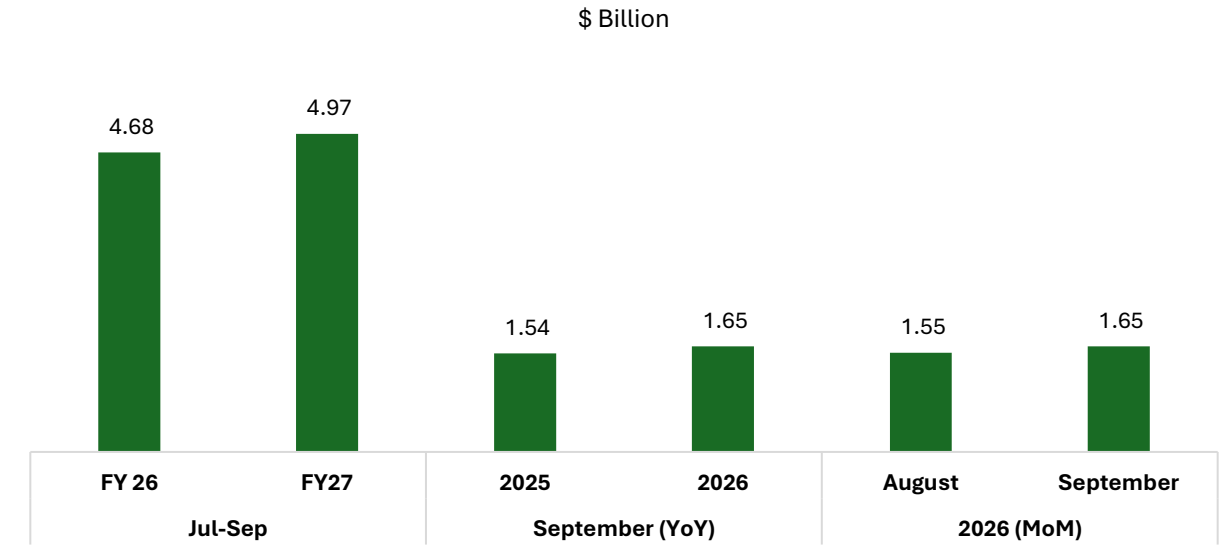
Fig 1.1 – Total Exports Growth



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

Pakistan's textile and apparel exports stood at $4.97 billion during July–September FY27, reflecting an increase of 6.1% from $4.68 billion in the same period of FY26. In September 2026 alone, exports were recorded at $1.65 billion, reflecting a 7% year-on-year increase compared to September 2025 ($1.54 billion) and a 6% month-on-month increase from $1.55 billion in August 2026.

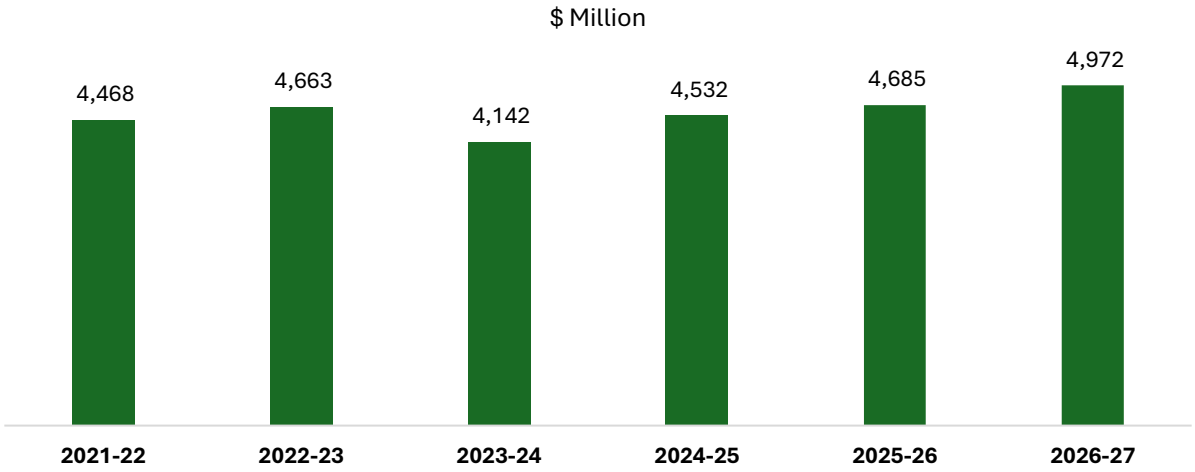
Fig 1.2 – Total Textile & Apparel Exports



Trend Analysis

Exports exhibited an overall upward trend during July–September over the period under review, despite a temporary decline in 2023–24. Exports increased from $4,468 million in July–September 2021–22 to $4,663 million in the corresponding period of 2022–23, before declining by 11.2% to $4,142 million in 2023–24. The trend subsequently reversed, with exports recovering to $4,532 million in 2024–25 and further increasing to $4,685 million in 2025–26, representing growth of 3.4%. The upward momentum continued during July–September 2026–27, with exports reaching $4,972 million, an increase of 6.1% over the corresponding period of the preceding year and the highest level during the period under review.

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

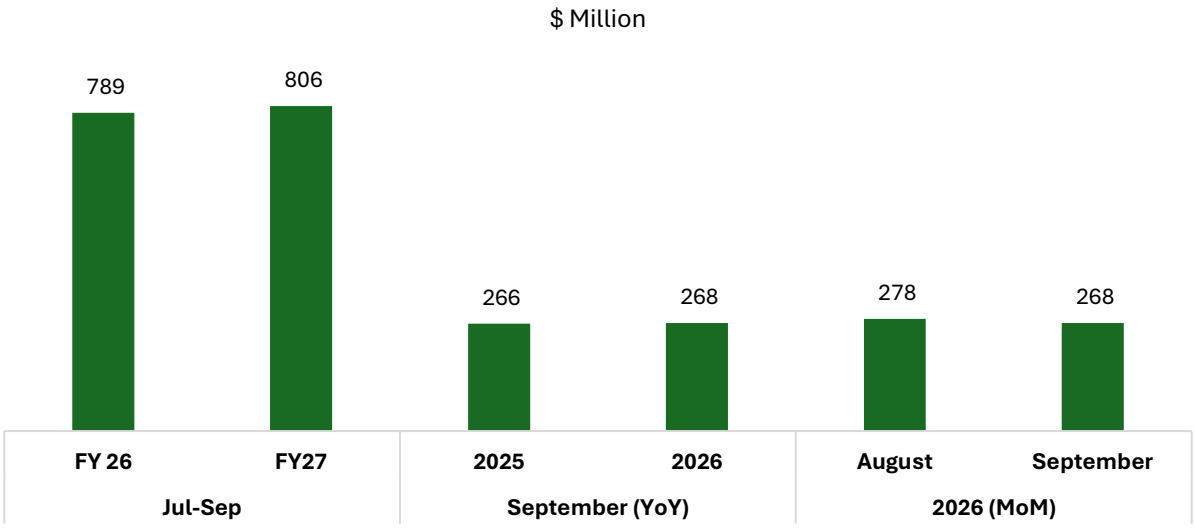


1.3 Exports by Product Category

A. Traditional Textiles (Chapters 50–60)

Pakistan's traditional textiles exports stood at $806 million during July–September FY27, reflecting an increase of 2.1% from $789 million in the same period of FY26. In September 2026, exports were recorded at $268 million, reflecting a 0.6% year-on-year increase compared to September 2025 ($266 million) and a 4% month-on-month decrease from August 2026 ($278 million).

Fig 1.4 – Textile Exports (Ch 50-60)



Trend Analysis

Exports of textiles under Chapters 50–60 exhibited a persistent declining trend during July–September over the period under review, falling from $1,039 million in FY2021–22 to $1,025 million in FY2022–23, $943 million in FY2023–24, $847 million in FY2024–25, and $789 million in FY2025–26. This represents an overall decline of approximately 24.0% from the FY2021–22 level. However, the trend reversed slightly during July–September FY2026–27, with exports increasing by 2.1% to $806 million compared to the corresponding period of the preceding year, although remaining below earlier levels. Major growth was shown by Cotton CH-52 (+3.79%), Wadding, felt and nonwovens CH-56 (+70.11%) and coated/impregnated fabrics CH-59 (+13.37%), while declines were recorded across man-made fibers, and other vegetable textile fibers.

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

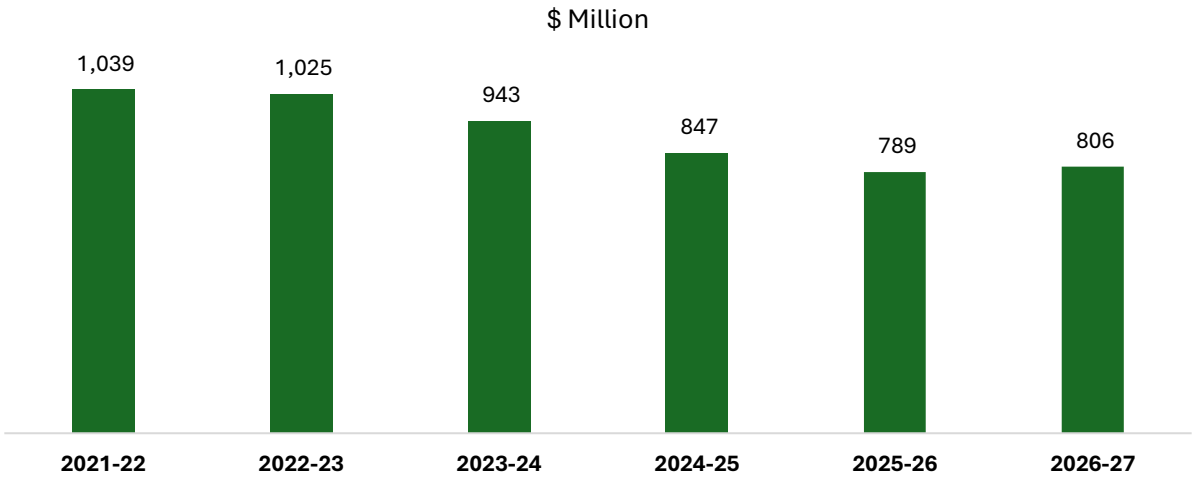


Table 1.1: Chapter-wise Textile Exports (July–September) – % Change

Values in USD Million

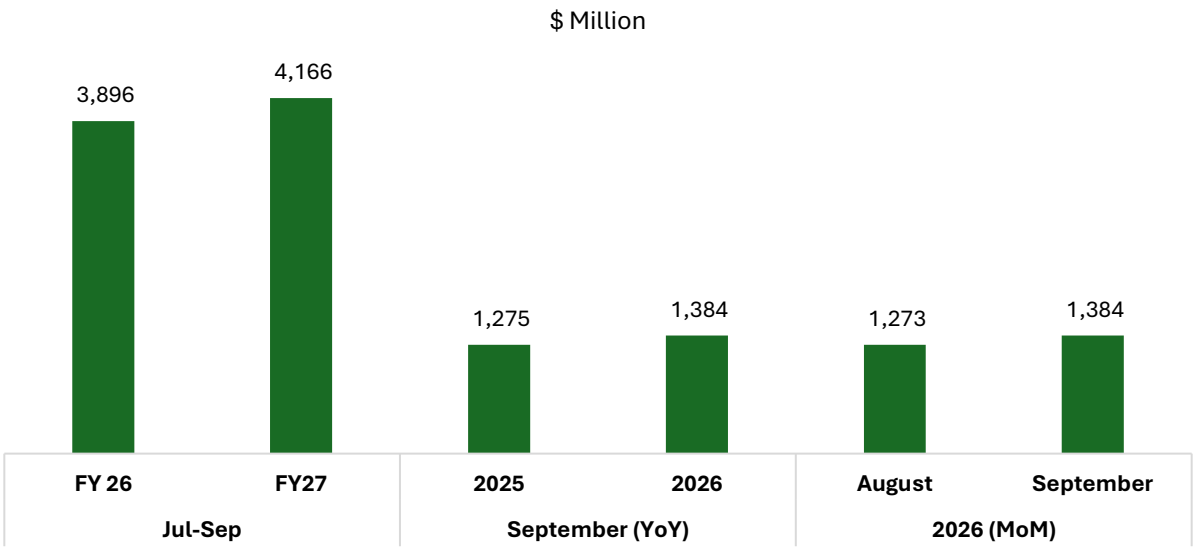
HS 2	Chapter Description	2025-26 ($M)	2026-27 ($M)	% Change
50	Silk	0.0	0.0	↑2.20%
51	Wool, fine/coarse animal hair; horsehair yarn and woven fabric	0.6	0.6	↑0.43%
52	Cotton	642.3	666.6	↑3.79%
53	Other vegetable textile fibers; paper yarn and woven fabrics	1.5	1.4	↓8.39%
54	Man-made filaments; strip and the like of man-made textile materials	13.2	9.9	↓24.75%
55	Man-made staple fibers	94.8	88.9	↓6.22%
56	Wadding, felt and nonwovens; special yarns; twine, cordage, ropes	2.4	4.0	↑70.11%
57	Carpets and other textile floor coverings	12.6	11.6	↓8.17%
58	Special woven fabrics; tufted textile fabrics; lace; tapestries	10.4	11.0	↑5.96%
59	Impregnated, coated, covered or laminated textile fabrics	2.6	2.9	↑13.37%
60	Knitted or crocheted fabrics	8.9	8.7	↓1.87%
	Total	**789.1**	**805.6**	**↑2.09%**

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

Pakistan's Apparel and Made-up textiles exports stood at $4,166 million during July–September FY27, reflecting an increase of 7.0% from $3,896 million in the same period of FY26. In September 2026, exports were recorded at $1,384 million, reflecting an 8.5% year-on-year increase compared to September 2025 ($1,275 million) and an 8.7% month-on-month increase from August 2026 ($1,273 million).

Fig 1.6 – Apparel and Made-Up Textiles Exports



Trend Analysis

The exports under Chapters 61–63 show an overall upward trend during July–September over the period under review, despite a temporary decline in 2023–24. Exports increased from $3,429 million in 2021–22 to $3,638 million in 2022–23, before falling to $3,199 million in 2023–24. The trend subsequently reversed, with exports rising to $3,685 million in 2024–25, $3,896 million in 2025–26, and further to $4,166 million in 2026–27. This represents growth of approximately 7.0% in July–September 2026–27 and an overall CAGR of 4.0% during the period under review. The sustained increase since 2023–24 indicates a strong recovery in exports under these chapters.

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

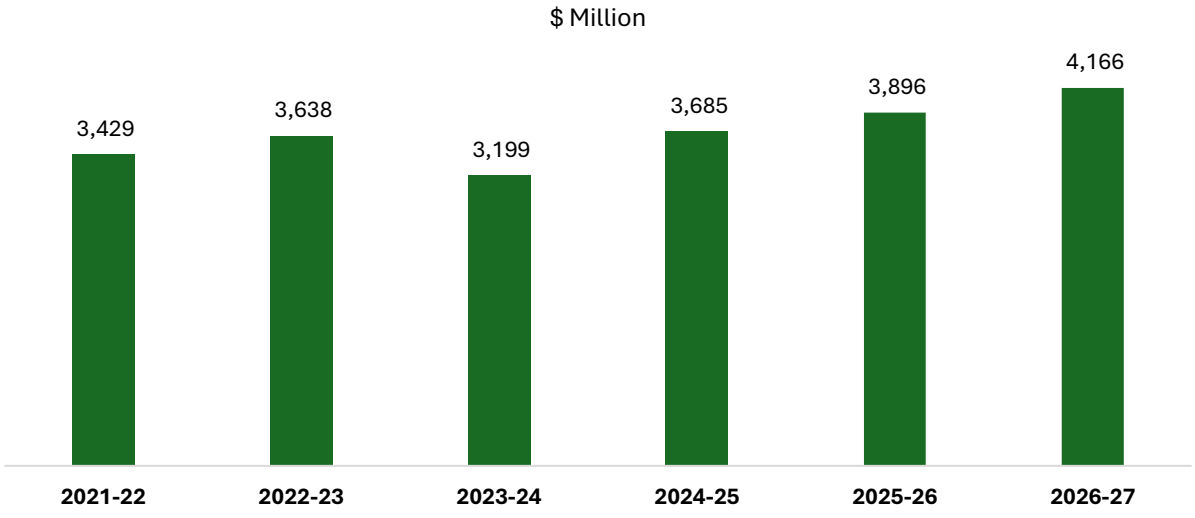


Table 1.2: Chapter-wise Textile-Clothing Exports – % Change

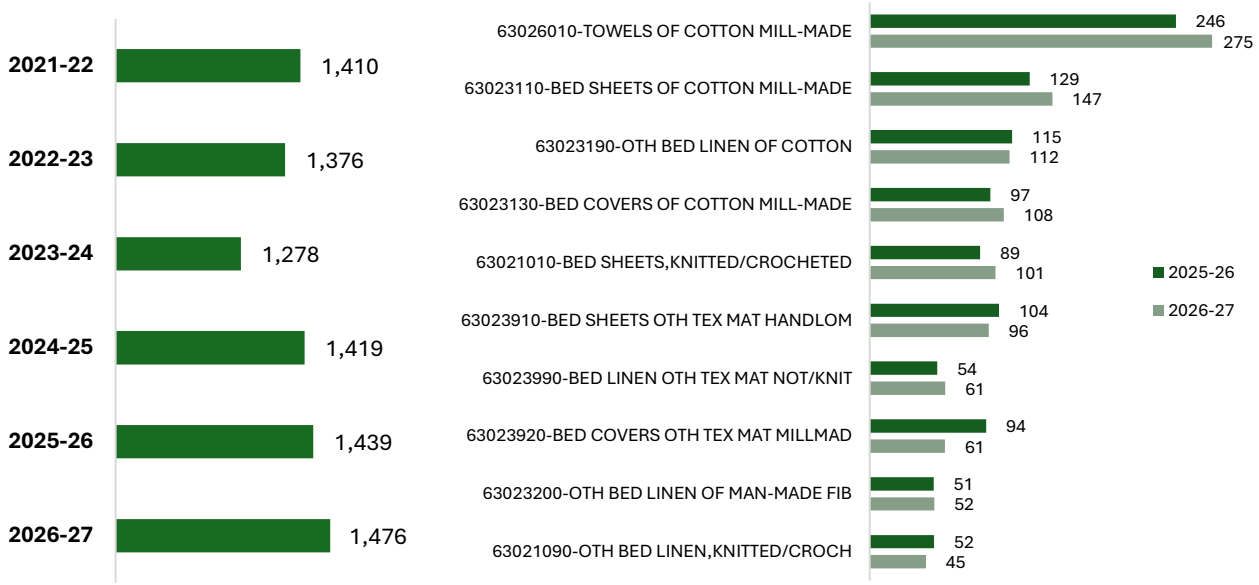
Values in USD Million

HS 2	Chapter Description	2025-26 ($M)	2026-27 ($M)	% Change
61	Articles of apparel, accessories, knit or crochet	1,409	1,472	↑4.5%
62	Articles of apparel and clothing accessories, not knitted or crocheted	1,048	1,218	↑16.2%
63	Other made textile articles, sets, worn clothing etc	1,439	1,476	↑2.6%
	Total	**3,896**	**4,166**	**↑7.0%**

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

Exports under Chapter 63 exhibited a mixed trend during July–September over the period under review. Export earnings declined from $1,410 million in 2021–22 to $1,376 million in 2022–23 and further to $1,278 million in 2023–24. However, exports recovered steadily to $1,419 million in 2024–25, $1,439 million in 2025–26, and further to $1,476 million in 2026–27, reaching the highest level during the period. At the product level, notable declines were recorded in bed covers of other textile materials, mill-made (HS 63023920), with exports falling from $94 million in 2025–26 to $61 million in 2026–27, and bed sheets of other textile materials, handloom (HS 63023910), declining from $104 million to $96 million over the same period.

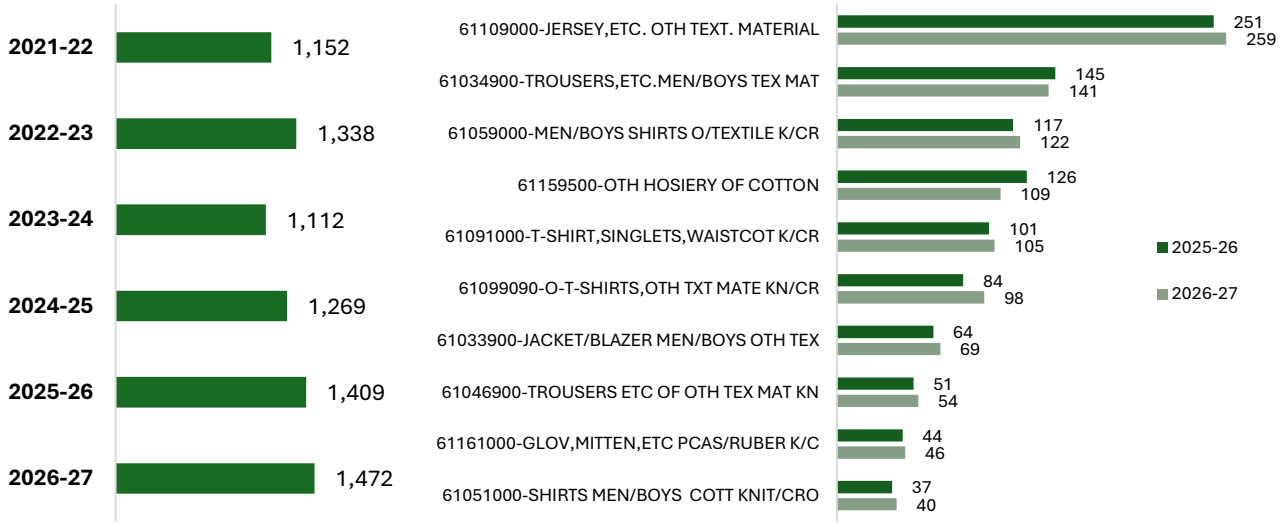
Fig 1.8 – Ch-63 Exports Trends (6 years) & Top 10 Export Items



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

Exports under Chapter 61 increased from $1,152 million during July–September 2021–22 to $1,338 million in 2022–23, before declining to $1,112 million in 2023–24. Exports subsequently recovered to $1,269 million in 2024–25, $1,409 million in 2025–26, and further to $1,472 million in 2026–27, reaching the highest level over the period. Key declines include other hosiery of cotton (HS 61159500), which fell from $126 million in 2025–26 to $109 million in 2026–27, and trousers of other textile materials for men/boys (HS 61034900), which declined from $145 million to $141 million over the same period.

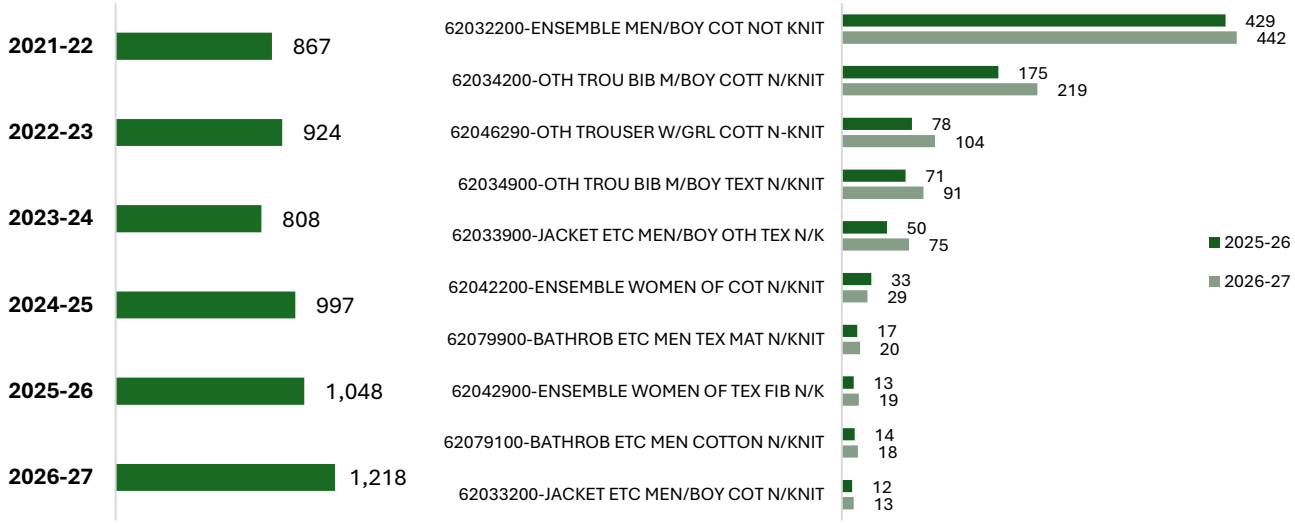
Fig 1.9 – Ch-61 Exports Trends (6 years) & Top 10 Export Items



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

Chapter 62 exports showed a strong growth trajectory during July–September, rising from $867 million in 2021–22 to $1,048 million in 2025–26, an increase of 20.8%. The highest exports were recorded in 2026–27 at $1,218 million, reflecting growth of 16.2%. Notable growth was observed in cotton trousers for men/boys (HS 62034200), increasing from $175 million in 2025–26 to $219 million in 2026–27.

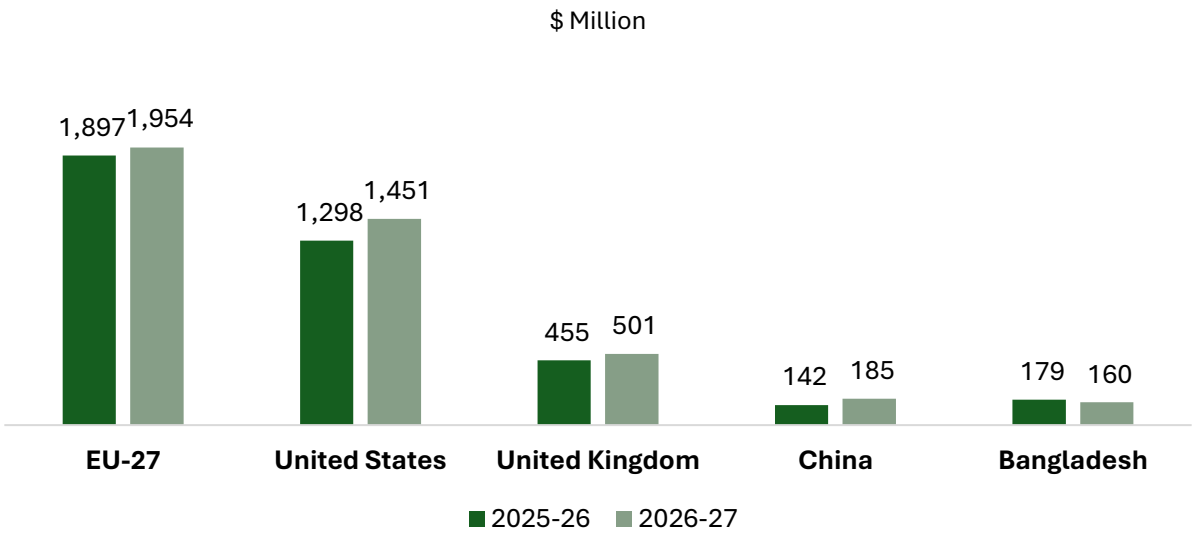
Fig 1.10 – Ch-62 Exports Trends (6 years) & Top 10 Export Items



1.4 Exports by Destination Country

Pakistan's top five textile and apparel export destinations showed broadly stable trends in 2026-27. The EU (27) was the largest market with exports of $1,954 million (up from $1,897 million in FY26), followed by the United States at $1,451 million, the UK at $501 million, China at $185 million and Bangladesh at $160 million.

Fig 1.11 – Top 5 Textile Export Destinations



A. European Union (27)

Pakistan's textile and apparel exports to the EU exhibited an overall upward trend during July–September over the six-year period, despite some fluctuations. Export earnings increased from $1,568 million in 2021–22 to $1,834 million in 2022–23, before declining to $1,532 million in 2023–24. Exports subsequently recovered to $1,805 million in 2024–25, $1,897 million in 2025–26 and further increased to a record $1,954 million in 2026–27, reflecting sustained growth in the EU market.

Fig 1.12 – Trend of Textile Exports to EU

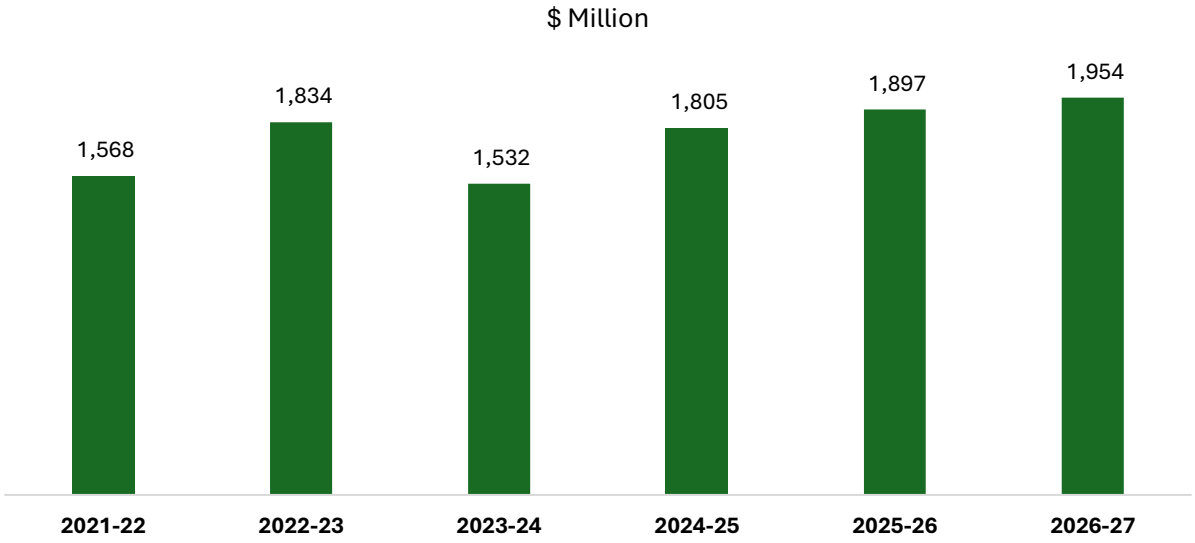


Table 1.3: Top 10 Exports to EU – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
1	62032200	Ensemble men/boy cot not knit	220	230	↑4.74%
2	63026010	Towels of cotton mill-made	98	109	↑11.16%
3	62034200	Oth trou bib m/boy cott n/knit	92	104	↑12.61%
4	61109000	Jersey, etc. Oth text. Material	87	96	↑10.90%

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
5	63023130	Bed covers of cotton mill-made	67	76	↑13.44%
6	63023110	Bed sheets of cotton mill-made	73	74	↑1.44%
7	63023190	Oth bed linen of cotton	74	73	↓1.37%
8	63021010	Bed sheets, knitted/crocheted	61	63	↑3.05%
9	61034900	Trousers, etc. men/boys tex mat	62	63	↑1.71%
10	61159500	Oth hosiery of cotton	51	49	↓4.72%

B. United States

Pakistan's textile exports to the United States exhibited a fluctuating but improving trend during July–September over the six-year period. Export earnings declined from $1,296 million in 2021–22 to $1,262 million in 2022–23 and further to $1,084 million in 2023–24. Exports subsequently recovered to $1,205 million in 2024–25, $1,298 million in 2025–26, and increased further to a record $1,451 million in 2026–27, reflecting growth of 11.7% over the corresponding period of the preceding year.

Fig 1.13 – Trend of Textile Exports to USA

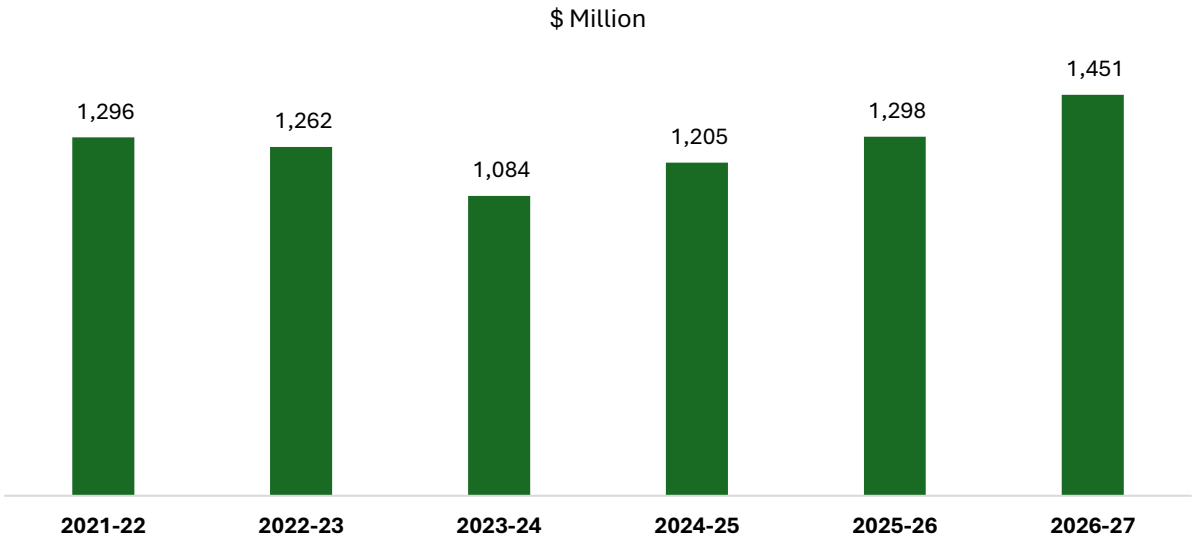


Table 1.4: Top 10 Exports to USA – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
1	62032200	Ensemble men/boy cot not knit	129	122	↓5.36%
2	61109000	Jersey, etc. Oth text. Material	108	109	↑0.86%
3	63026010	Towels of cotton mill-made	93	107	↑15.96%
4	62034200	Oth trou bib m/boy cott n/knit	45	73	↑63.89%
5	61099090	O-t-shirts, oth txt mate kn/cr	51	58	↑13.54%
6	61059000	Men/boys shirts o/textile k/cr	45	54	↑18.50%
7	61091000	T-shirt, singlets, waistcot k/cr	40	49	↑22.05%

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
8	61034900	Trousers, etc. men/boys tex mat	48	45	↓6.19%
9	62046290	Oth trouser w/grl cott n-knit	31	40	↑28.66%
10	61159500	Oth hosiery of cotton	53	39	↓25.36%

C. United Kingdom

Pakistan's textile exports to the United Kingdom exhibited an overall improving trend during July–September over the six-year period. Export earnings declined from $442 million in 2021–22 to $420 million in 2022–23 and further to $405 million in 2023–24, before recovering to $455 million in 2024–25. Exports remained stable at $455 million in 2025–26 and increased to a record $501 million in 2026–27, reflecting growth of 10.0% over the corresponding period of the preceding year.

Fig 1.14 – Trend of Textile Exports to UK

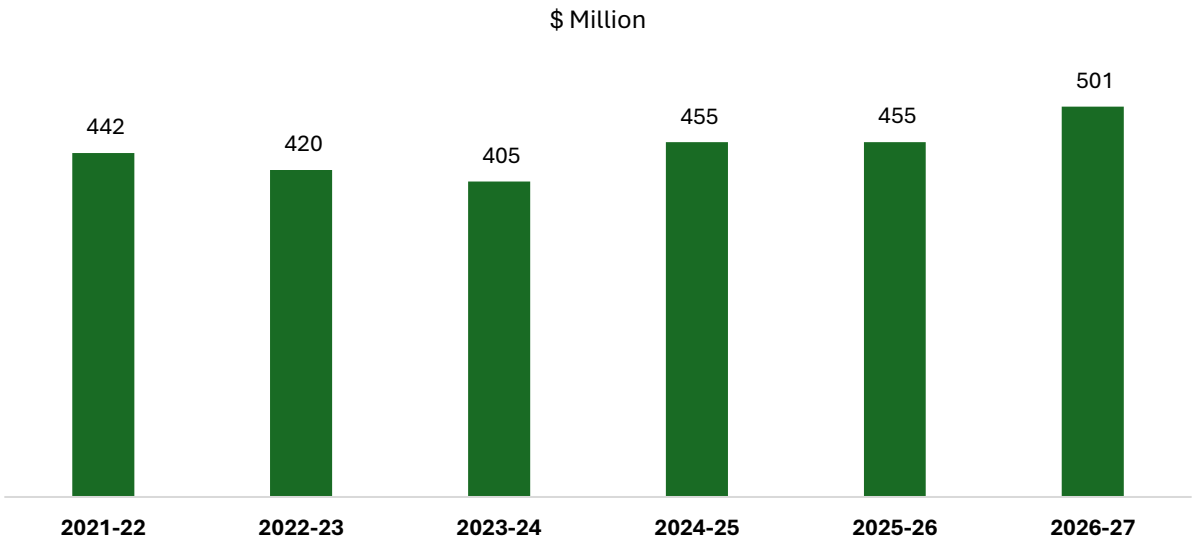


Table 1.5: Top 10 Exports to UK – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
1	62032200	Ensemble men/boy cot not knit	28	38	↑35.1%
2	61109000	Jersey, etc. Oth text. Material	36	36	↓0.8%
3	63026010	Towels of cotton mill-made	22	23	↑4.8%
4	63023130	Bed covers of cotton mill-made	19	21	↑14.1%
5	61034900	Trousers, etc.men/boys tex mat	23	21	↓7.8%
6	63023110	Bed sheets of cotton mill-made	15	20	↑30.6%
7	63023920	Bed covers oth tex mat millmad	21	20	↓8.7%
8	61059000	Men/boys shirts o/textile k/cr	17	18	↑4.7%
9	63023910	Bed sheets oth tex mat handloom	17	15	↓13.9%
10	62034200	Oth trou bib m/boy cott n/knit	15	13	↓10.3%

D. China

Pakistan's textile exports to China exhibited a highly fluctuating trend during July–September over the six-year period. Export earnings declined from $204 million in 2021–22 to $124 million in 2022–23, before rising sharply to a peak of $266 million in 2023–24. Exports then fell significantly to $114 million in 2024–25, before recovering to $142 million in 2025–26 and further increasing to $185 million in 2026–27, reflecting growth of 30.5% over the corresponding period of the preceding year.

Fig 1.15 – Trend of Textile Exports to China

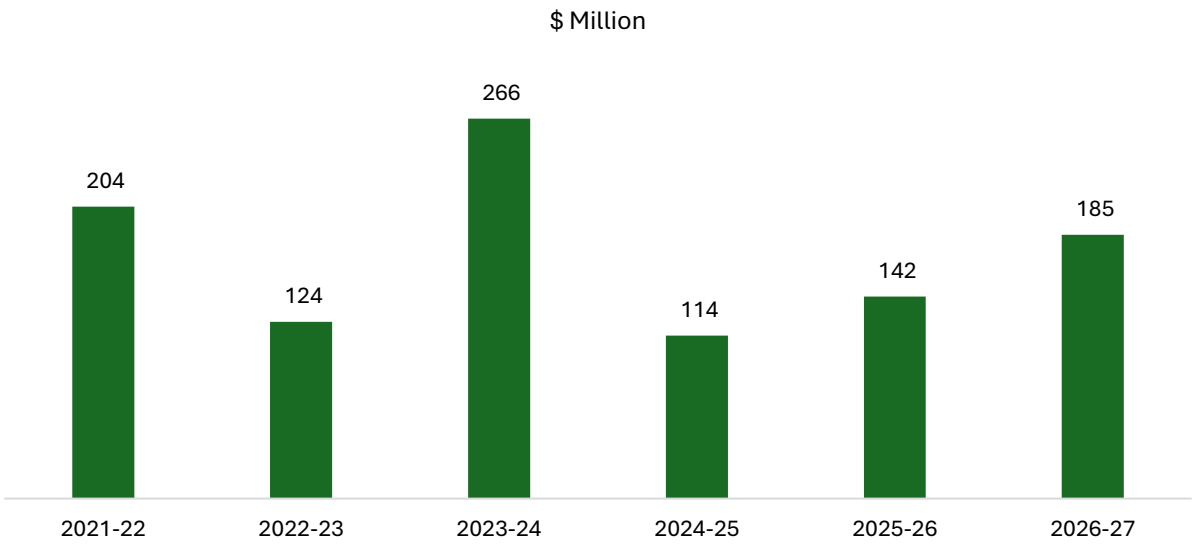


Table 1.6: Top 10 Exports to China – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
1	52051100	Sin.cot.yar.u.com.fib.d-714.29	75.8	88.4	↑16.56%
2	52051200	S-cot. yarn ucf.d-232.56-714.29	40.3	77.4	↑92.04%
3	52081200	Wov fab cot wt>100g/sqm unblea	4.8	4.2	↓13.61%
4	61159500	Oth hosiery of cotton	1.2	1.2	↑5.05%
5	52052200	S/c yarn lf.dx.232.56-714.29	1.8	1.0	↓45.41%
6	61109000	Jersey, etc. Oth text. Material	1.4	0.8	↓44.81%
7	61161000	Glove, mitten, etc pcas/ruber k/c	1.2	0.7	↓43.14%
8	61034900	Trousers, etc.men/boys tex mat	1.1	0.7	↓38.34%
9	52081900	Other woven cotton fab un-blh	1.5	0.3	↓78.59%
10	52091200	Cotton wov fab 3-4thread un-bl	1.8	0.2	↓91.30%

E. Bangladesh

Pakistan's textile exports to Bangladesh exhibited a fluctuating trend during July–September over the six-year period. Export earnings declined from $203 million in 2021–22 to $197 million in 2022–23 and further to $143 million in 2023–24. Exports subsequently recovered to $175 million in 2024–25 and $179 million in 2025–26, before

declining by 10.6% to $160 million in 2026–27. Bangladesh primarily imports textile inputs from Pakistan, particularly cotton yarn and cotton fabric.

Fig 1.16 – Trend of Textile Exports to Bangladesh

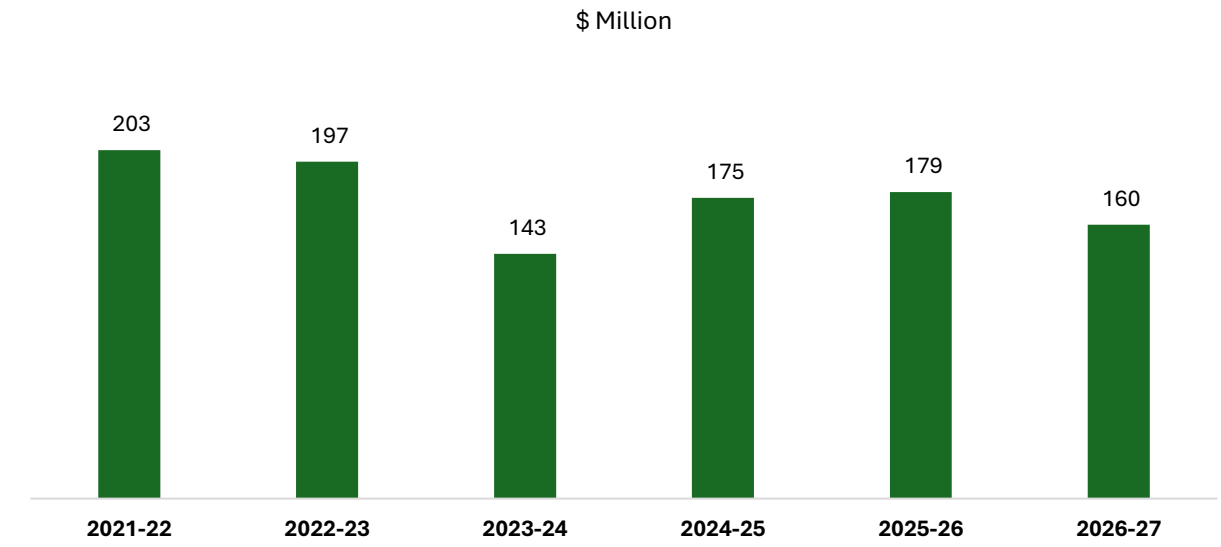


Table 1.7: Top 10 Exports to Bangladesh – HS 8 Level

Values in USD Million

Sr.#	HS-8	Product Description	2025-26	2026-27	% Change
1	52094200	Cotton wov fab denim>200g/sqm	99.0	82.9	↓16.24%
2	52093200	Cotton wov fab dyed 3-4 thread	14.4	19.4	↑34.71%
3	52114200	W-fab cot denm,mx mfw>200g/sqm	20.5	15.6	↓24.06%
4	52051100	Sin.cot.yar.u.com.fib.d-714.29	6.0	9.3	↑55.53%
5	52051200	S-cot.yarn ucf.d-232.56-714.29	10.3	7.2	↓30.02%
6	52092200	Cot wov fab 3/4thrd w>200g/sqm	2.3	4.0	↑71.54%
7	52122300	Oth cot wov fab dyed>200g/sqm	3.3	1.3	↓60.36%
8	52113200	Wov fab 3-4thread mix>200gdyed	1.5	1.1	↓29.47%
9	52093900	Oth cot wov fab dyed>200g/sqm	1.7	0.7	↓61.28%
10	52051300	S-cot.yarn ucf.d-192.31-232.56	2.5	0.2	↓93.06%

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 Export Finance Scheme (EFS) and Long-Term Financing Facility (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 governments 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.
- **Zero-Rating:** Restore zero rated regime for exporters.

CONCLUSION

Pakistan's export performance in the period under analysis reflects a phase of growth, with overall exports increasing by 11.1% while textile and apparel exports rose by 6.1%. Growth in value-added segments (Chapters 61–63) contrasts with a persistentdecline 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 growth 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.

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ABOUT PAKISTAN TEXTILE COUNCIL

Pakistan Textile Council (PTC) is a not-for-profit organization established to serve as a research, advocacy, and impact acceleration platform for Pakistan's textile and apparel sector. Our mission is to help shape a path of sustainable growth for Pakistan's textile and apparel sector, delivering 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.

Strategic Objectives:

- Enable increased local and foreign investment in growth, innovation, and sustainability, making Pakistan a sourcing destination of choice.
- 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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