



PAKISTAN READYMADE GARMENT



TRADE DEVELOPMENT AUTHORITY OF PAKISTAN



TDAP INTRODUCTION

Trade Development Authority of Pakistan is the premier trade promotion organization mandated to develop and promote products and services of the country in international markets.

TDAP implements policies and directives of Federal Government and its Board of Directors for enhancing, promoting and facilitating trade.

TDAP supports and facilitates businesses through latest information and capacity building initiatives to enhance and improve their leverage in international trade.

To achieve its objectives, TDAP organizes as well as participates in local & international trade fairs, country specific exhibitions, trade delegations, conducts seminars and organizes contacts and information exchange events both physically as well on digital platforms.

This publication is part of the efforts of TDAP to share details and showcase Pakistan's products and services in international markets.

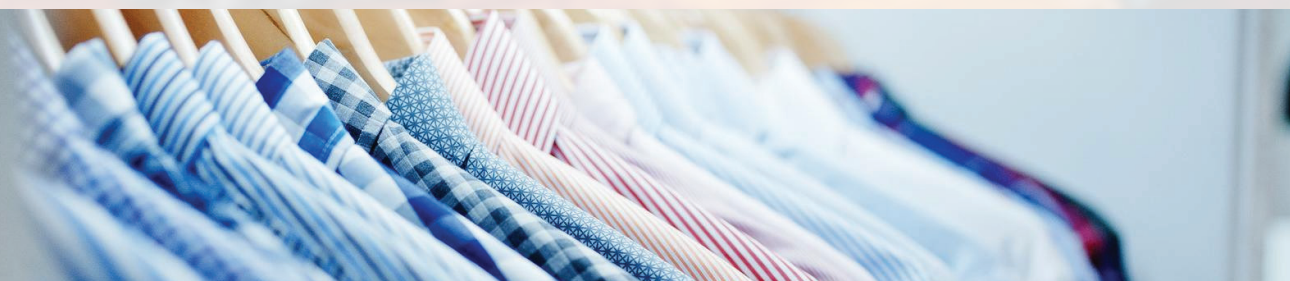
INTRODUCTION OF PAKISTAN GARMENTS SECTOR

Garments industry of Pakistan is innovative and creative. It produces new designs according to latest fashion trends of the industry and needs of the customers. USA, Germany, UK, Spain, Italy, and France are the main export destinations of Pakistan's Readymade Garments and Knitwear. Knitted garments play a pivotal role in value addition in the apparel sector where the products are wide in range and include T-Shirts, Jogging Suits, Pajamas, Sport Jerseys, Gloves, Night Gowns, Sweaters and Socks. The products also include utility items such as uniforms, overalls, and industrial workwear. Apparel sector of Pakistan is not only satisfying demand of local customers but also has high demand in international markets. Most of the machines utilized by the industry are imported. The total exports of the articles of apparel including knitted and not-knitted apparels by Pakistan crossed \$9 billion in 2022.

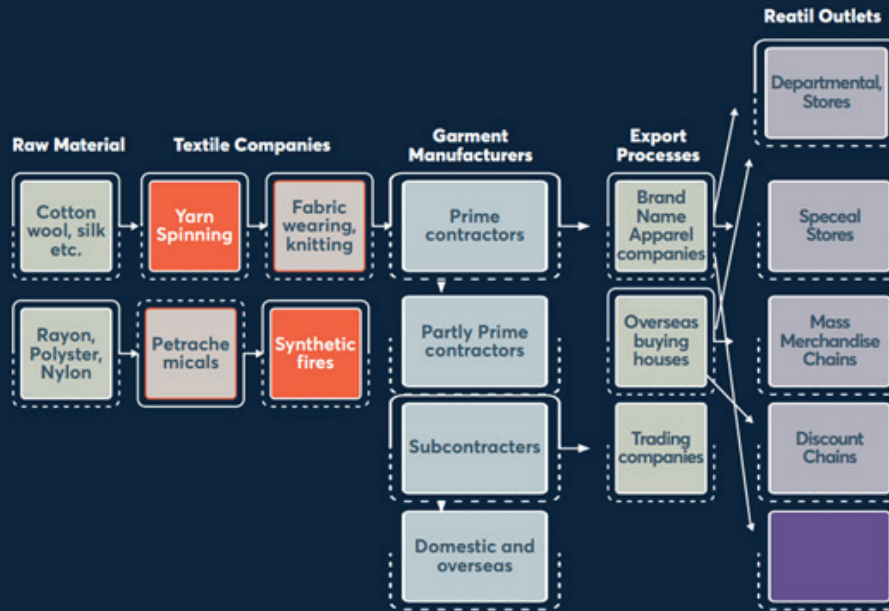
BRIEF ON FACTS OF GARMENTS INDUSTRY OF PAKISTAN

Facts and contribution of garment industry of Pakistan in economy and export of Pakistan:

- Pakistan is the 7th largest exporter of garments in Asia.
- It is 5th largest producer and 3rd largest consumer of cotton.
- It comprises of 46% of the total manufacturing sector and provides employment to 40% of the total labour force.
- The industry consists of 11.3 million spindles, 3 million rotors, 350,000 power looms, 18,000 knitting machines and processing capacity of 5.2 billion square meters.
- It has about 700,000 industrial and domestic stitching machines. There are 21 filament yarn units having capacity of 100,000 tons.
- A complete textile value chain exists in the country, unlike many other countries that possess only the primary base or the finished base.
- Pakistan has supply base for almost all man-made and natural yarns and fabrics, including cotton, rayon and others. This abundance of raw material is a big advantage for Pakistan due to its beneficial impact on cost and operational lead time.
- The demand for textiles apparel in the world was around \$1.5 trillion at the end of 2022 and it is projected to increase at a CAGR of 2.8% during 2023-2027. Given the positive demand outlook, Pakistan has significant opportunity to earn foreign exchange through textile exports.
- Pakistan can produce goods at a cheaper cost as compared to western countries and hence is a good location for outsourcing production.
- Many international brands currently operate in Pakistan and work with the local textiles mills such as H&M, Levis, Target, Marks & Spencer, Nike, Adidas, and Puma.



Main activities in ready-made garments value chain



Raw Material Networks ----- Intermediate good Network ----- Production Network ----- Export Network ----- Marketing Networks

HS Codes

S.no.	HS Code	Product
1	620322	Men's or boys ensembles of cotton (excluding knitted or crocheted, ski ensembles and swimwear)
2	611090	Knitted Jerseys, pullovers, cardigans, waistcoats
3	620342	Men's or boys trousers, bib and brace overalls, breeches and shorts, of cotton
4	610590	Men's or boys' shirts of textile materials, knitted or crocheted (excl. of cotton or man-made)
5	610349	Men's or boys' trousers, bib and brace overalls, breeches and shorts (non-cotton)
6	610910	T-shirts, singlets and other vests of cotton, knitted or crocheted



PAK EXPORT FIGURES (5 YEARS) - (VALUES IN USD'000):

Sr. no.	Headings	Description
1.	61.01	Men's or boys' overcoats, car- coats, capes, cloaks, anoraks (including ski- jackets), windcheaters, wind- jackets and similar articles, knitted or crocheted
2.	61.02	Women's or girls' overcoats, car- coats, capes, cloaks, anoraks (including ski-jackets), windcheaters, wind- jackets and similar articles, knitted or crocheted
3.	61.03	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear), knitted or crocheted
4.	61.04	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts (other than swimwear), knitted or crocheted
5.	61.05	Men's or boys' shirts, knitted or crocheted
6.	61.06	Women's or girls' blouses, shirts and shirt blouses, knitted or crocheted.
7.	61.07	Men's or boys' underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar articles, knitted or crocheted
8.	61.08	Women's or girls' slips, petticoats, briefs, panties, nightdresses, pyjamas, négligés, bathrobes, dressing gowns and similar articles, knitted or crocheted.
9.	61.09	T- shirts, singlets and other vests, knitted or crocheted.
10.	61.10	Jerseys, pullovers, cardigans, waistcoats and similar articles, knitted or crocheted.
11.	61.11	Babies' garments and clothing accessories, knitted or crocheted
12.	61.12	Track suits, ski suits and swimwear, knitted or crocheted
13.	61.13	Garments, made up of knitted or crocheted fabrics.
14.	61.14	Other garments, knitted or crocheted.
15.	61.15	Panty hose, tights, stockings, socks and other hosiery, including graduated compression hosiery (for example, stockings for varicose veins) and footwear without applied soles, knitted or crocheted.
16.	61.16	Gloves, mittens and mitts, knitted or crocheted.
17.	61.17	Other made up clothing accessories, knitted or crocheted; knitted or crocheted parts of garments or of clothing accessories (- Shawls, scarves, muffl-ers, mantillas, veils and the like

PAK EXPORT FIGURES (5 YEARS) - (VALUES IN USD'000):

Sr. no.	Headings	Description
18.	62.01	Men's or boys' overcoats, car-coats, capes, cloaks, anoraks (including ski-jackets), windcheaters, wind-jackets and similar articles,
19.	62.02	Women's or girls' overcoats, car-coats, capes, cloaks, anoraks (including skijackets), wind-cheaters, wind-jackets and similar articles
20.	62.03	Men's or boys' suits, ensembles, jackets, blazers, trousers, bib and brace overalls, breeches and shorts (other than swimwear)
21.	62.04	Women's or girls' suits, ensembles, jackets, blazers, dresses, skirts, divided skirts, trousers, bib and brace overalls, breeches and shorts (other than swimwear).
22.	62.05	Men's or boys' shirts.
23.	62.06	Women's or girls' blouses, shirts and shirtblouses.
24.	62.07	Men's or boys' singlets and other vests, underpants, briefs, nightshirts, pyjamas, bathrobes, dressing gowns and similar articles
25.	62.08	Women's or girls' singlets and other vests, slips, petticoats, briefs, panties, nightdresses, pyjamas, negliges, bathrobes, dressing gowns and similar articles.
26.	62.09	Babies' garments and clothing accessories.
27.	62.10	Garments made up of fabrics of heading 56.02, 56.03, 59.03, 59.06 or 59.07.
28.	62.11	Track suits, ski suits and swimwear; other garments.
29.	62.12	Brassieres, girdles, corsets, braces, suspenders, garters and similar articles and parts thereof, whether or not knitted or crocheted
30.	62.13	Handkerchiefs
31.	62.14	Shawls, scarves, mufflers, mantillas, veils and the like.
32.	62.15	Ties, bow ties and cravats.
33.	62.16	Gloves, mittens and mitts.
34.	62.17	Other made up clothing accessories; parts of garments or of clothing accessories

**PRODUCT: 61 ARTICLES OF APPAREL AND CLOTHING ACCESSORIES,
KNITTED OR CROCHETED**

GLOBAL TOP IMPORTERS FOR KNITWEAR | UNIT: THOUSAND USD

Importers	Value in 2018	Value in 2019	Value in 2020	Value in 2021	Value in 2022
World	215,078,129	215,748,742	187,097,727	232,897,446	264,225,867
United States of America	47,681,654	48,160,270	38,254,141	52,249,668	60,784,841
Germany	20,233,915	19,639,904	18,990,708	22,886,583	25,041,002
France	11,796,521	11,584,604	10,253,183	12,265,342	13,897,288
United Kingdom	13,048,094	13,018,418	11,021,271	12,078,169	13,780,660
Japan	13,781,060	13,663,490	11,989,270	12,532,298	13,157,446

PAKISTAN'S TOP EXPORT MARKETS FOR KNITWEAR | UNIT: THOUSAND USD

Importers	Value in 2018	Value in 2019	Value in 2020	Value in 2021	Value in 2022
World	2,878,652	3,028,781	3,063,941	4,498,019	5,138,146
United States of America	1,044,612	1,122,433	1,128,223	1,955,615	2,030,382
United Kingdom	442,183	418,294	493,345	641,203	615,466
Netherlands	221,029	262,816	249,108	299,742	440,800
Spain	221,001	218,662	196,459	266,521	413,544
Germany	219,007	256,711	286,094	351,039	401,066



PRODUCT: 62 ARTICLES OF APPAREL AND CLOTHING ACCESSORIES,
NOT KNITTED OR CROCHETED

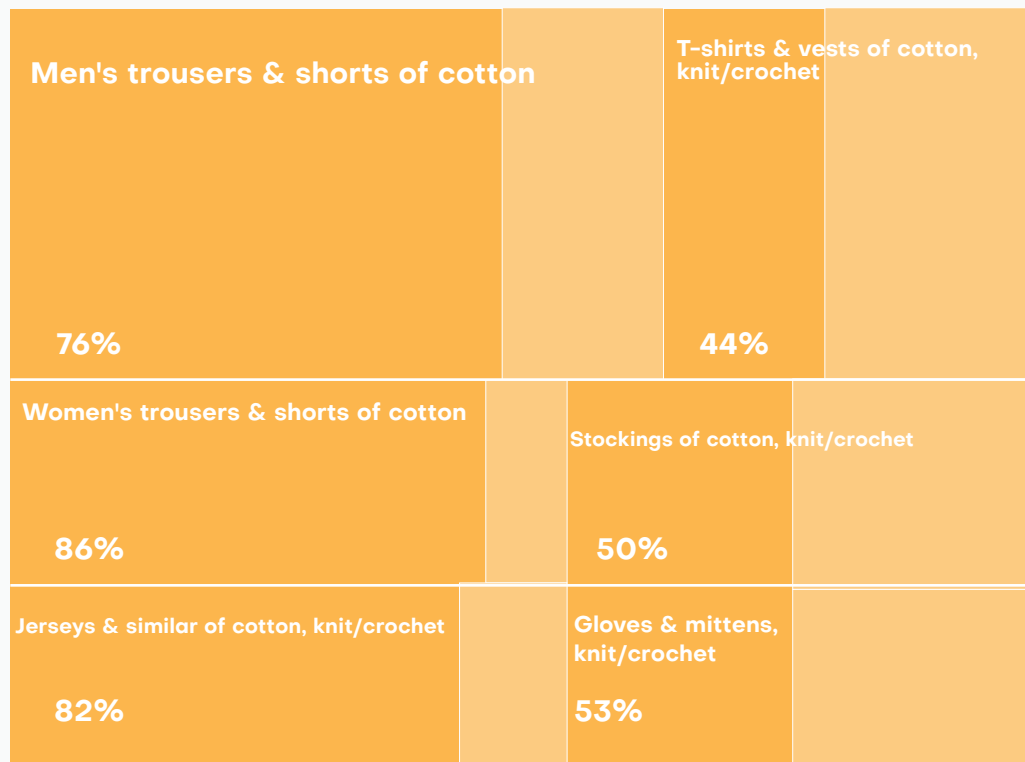
GLOBAL TOP IMPORTERS FOR NON-KNITTED APPAREL | UNIT: THOUSAND USD

Exporters	Value in 2018	Value in 2019	Value in 2020	Value in 2021	Value in 2022
World	235,397,896	234,082,856	206,256,371	233,767,264	255,767,996
China	71,448,039	66,663,157	62,275,544	70,099,298	76,874,394
Bangladesh	18,942,626	19,901,604	17,076,976	19,978,903	25,474,410
Italy	13,794,171	13,938,107	11,756,827	13,899,035	16,050,543
Viet Nam	14,301,298	15,153,098	13,329,806	13,659,990	12,925,103
Germany	12,276,548	12,489,807	11,500,058	12,347,552	12,222,787

PAKISTAN'S TOP EXPORT MARKETS FOR KNITWEAR| UNIT: THOUSAND USD

Importers	Value in 2018	Value in 2019	Value in 2020	Value in 2021	Value in 2022
World	2,599,885	2,814,503	2,626,263	3,395,080	3,928,828
United States of America	599,723	643,223	669,465	1,085,093	1,240,731
Spain	328,963	361,206	268,737	348,249	409,679
Netherlands	179,372	246,194	233,990	322,235	383,576
Germany	279,291	310,284	300,119	317,728	382,421
United Kingdom	309,878	323,567	278,773	345,592	361,924





Pakistan's products with potential

Legend

- Export potential
- Realized potential
- Apparel





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