

Apparel

Sector Brief

The objective of this short write-up is to provide the reader with an overview of the sector. The information covers global trade of the product, status of Pakistan's exports and summary of industry structure. Trade information for global comparisons has been obtained from PC-TAS, International Trade Centre's Database. Latest available export data on Pakistan has been obtained from the Federal Bureau of Statistics, Pakistan.

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1. Introduction:

The textile industry has been the driving force behind the manufacturing sector growth of Pakistan. This sector accounts for nearly 60% of total exports for Pakistan, 46% of total manufacturing produce and employs 38% of the total manufacturing labor force. Textile trade is classified into two broad categories i.e textile which include yarn, fabric and made-ups and clothing which represents ready-made garments.

The largest growing sector within the global textiles trade has been the apparel sector – trade in this sector in 1999 accounted for 53% of the total value of global textile trade. Over the last decade, the apparel trade has surpassed the trade in textile products such as yarns and fabrics. In the year 2000 total trade in textiles was \$157 billion and trade in clothing was \$199 billion. There was a switch in trade patterns after 1985 when clothing became more significant as compared to textiles. This sector lies at the pinnacle of the textile value chain, which begins with cotton and synthetic fibers. South Asian countries have established themselves as the most important players in the textile sector.

2. Global Perspective:

Apparel being a major international trading commodity accounted for more than US\$ 1.5 billion trade in 2000. Global exports of apparel have increased by 10.2% in previous 5 years i.e. 1996-2000. The average annual increase was approximately 2.59%. This has been because of factors such as frequent movements in the global fashion scene and enhanced usage of diverse fabrics and materials particularly in the women apparel segment.

Global Exports of Apparel (in \$ million)	
1996	137,871
1997	154,036
1998	155,421
1999	154,198
2000	151,949

Asian countries being the leading players in the international apparel exports, accounted for 45% of total apparel trade in 2000. China was the largest exporter with 40% share, Hong Kong being second shared 14% while Turkey was third with 10% of the total exports of the Asian region. South Asian countries in 1999 exported apparel worth \$12.5 billion and have a combined share of 20% in Asian exports.

Leading global importers of apparel in the year 2000 have been U.S.A. with 32% and Japan with 10% share of total imports.

3. Pakistan:

The textile exports of Pakistan were approximately \$5.1 billion in the year 1999-2000 while apparel exports were \$1.74 billion, which was 34% of the total textile exports. There was an increase in value of apparel exports by 16% during 1996-2000. The share of Pakistan's apparel exports in the global market is less than 1%.

Pakistan Exports to World in Million Dollars					
Year	1996	1997	1998	1999	2000
Export Value	1,503	1,453	1,484	1,530	1,745

Leading importers from Pakistan were U.S.A. and the European Union, which accounted for 92% of Pakistan's exports. Globally, they are also major players in the import market, accounting for approximately 65% of total world imports. The United States has been the largest importer of apparel from Pakistan and its imports from Pakistan have increased by 42% from 1995-1999. Imports from Pakistan by the European Union have increased by 14% during the same period.

Leading Importers (in \$ million)					
Year	1995	1996	1997	1998	1999
E.U.	406.7	464.4	417.1	428.2	462.6
U.S.A	529	648	654	721	751

Within the apparel sector, there are several segments. Each segment has been individually discussed in the subsequent sections.

Code	Product
841	Men/Boys Wear Woven
842	Women/Girl Clothing Woven
843	Men/Boy Wear Knit/Crochet
844	Women/Girl Wear Knit/Crochet
845	Articles of Apparel NES
846	Clothing Accessories

4. Men/Boys Wear, Woven (841)

One sub-category is Men/Boys Wear, Woven (841). The main exporter of Men/Boys Wear, Woven in the year 2000 was China with 23% of total exports for Men/Boys Wear, Woven. Italy had 7.3% of the total exports and Mexico had a share of 6.9% of total exports in the year 2000 for Men/Boys Wear Woven. Important to note here is that Mexico's share has increased significantly by an annual average of 27%. This is due to the fact that Mexico is a member of NAFTA and has a competitive advantage in low labour costs.

World Exports 1996-2000			US\$ millions			
Product: 841 - MENS/BOYS WEAR, WOVEN						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
CHINA	6,338	7,076	6,324	6,487	7,667	23.03%
ITALY	3,005	2,672	2,774	2,556	2,432	7.31%
MEXICO	893	1,349	1,628	1,908	2,300	6.91%
HONG KONG	1,951	1,978	2,031	1,919	1,913	5.75%
GERMANY	1,564	1,524	1,676	1,651	1,408	4.23%
INDONESIA	1,132	878	943	1,159	1,386	4.16%
Total	33,985	35,118	36,598	34,474	33,297	100.00%

There has been a 2% decrease in exports of Men/Boys Wear, Woven between 1996 and 2000. The main importer of Men/Boys Wear, Woven is U.S.A. In the year 2000 U.S.A.

imported approximately 35% of total imports and Japan imported 10% of total imports of Men/Boys Wear, Woven.

Imports 1996-2000						
Product: 841 - MENS/BOYS WEAR, WOVEN						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	
U.S.A.	9,543,892	11,004,685	12,069,784	12,359,088	13,862,971	34.62%
JAPAN	4,369,269	3,735,739	3,142,114	3,452,880	4,006,149	10.00%
GERMANY	5,003,514	4,607,041	4,653,973	4,306,922	3,766,576	9.41%
UNTD KINGDOM	2,088,025	2,226,241	2,297,634	2,375,010	2,430,322	6.07%

4.1. Pakistan:

Pakistan's exports of Men/Boys Wear, Woven have increased by 16% over the period 1996-2000.

Exports 1996-2000					
Reporter: PAKISTAN					
Product group	1996	1997	1998	1999	2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
841 MENS/BOYS WEAR, WOVEN	467,313	508,864	460,864	469,236	540,397

5. Women/Girl Clothing, Woven (842)

Another sub-category of apparel is Women/Girl Clothing, Woven (842). The main exporters of Women/Girl Clothing, Woven are China, which had a share of 21.2% of total exports, Italy, which had a share of 8.17% of total exports and Hong Kong which had a share of 7.4% of total exports in the year 2000. Again Mexico has shown impressive growth, registering an increase in growth of approximately 25% per annum.

Exports 1996-2000						
Product: 842 - WOMEN/GIRL CLOTHING WOVEN						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	
CHINA	5,822,735	6,349,192	5,807,032	6,032,383	7,270,067	21.25%
ITALY	3,520,569	3,344,120	3,212,891	2,868,267	2,796,136	8.17%
HONG KONG	2,357,563	2,374,120	2,463,206	2,471,523	2,526,615	7.39%
GERMANY	2,772,700	2,698,963	2,813,172	2,636,268	2,149,551	6.28%
MEXICO	913,222	1,381,252	1,682,544	1,848,380	2,130,994	6.23%
TURKEY	1,167,669	1,253,174	1,370,367	1,380,730	1,474,857	4.31%
INDONESIA	958,906	858,654	692,303	1,042,951	1,294,812	3.78%
FRANCE	1,163,646	1,101,948	1,253,306	1,196,466	1,043,629	3.05%
ROMANIA	605,881	683,528	721,198	727,480	841,825	2.46%
Total	32,920,802	34,136,293	35,823,012	35,600,192	34,212,639	100.00%

There has been an increase of 3.9% in the value of exports of Women/Girl Clothing, Woven over the period 1996-2000.

The main importer of Women/Girl Clothing, Woven in the year 2000 was U.S.A. which imported approximately 34% of the total imports. Germany imported 11% of total imports and Japan approximately imported 9.6% of total imports for the year 2000.

Imports 1996-2000						
Product: 842 - WOMEN/GIRL CLOTHING WVEN						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	Share in 2000
USA	10,777,180	12,263,975	13,204,869	13,299,141	15,431,335	34.36%
GERMANY	6,378,081	5,927,806	6,027,128	5,468,668	4,808,953	10.71%
JAPAN	4,510,999	3,669,565	3,061,118	3,567,776	4,323,556	9.63%
HONG KONG	3,152,313	3,336,236	3,013,166	3,044,643	3,327,241	7.41%
UK	2,217,455	2,498,814	2,741,273	2,873,281	3,058,161	6.81%
FRANCE	2,179,471	2,216,556	2,389,641	2,405,153	2,399,812	5.34%

5.1. Pakistan:

Pakistan's exports have decreased by approximately 14% for Women/Girl Clothing, Woven over the period 1996-2000. This has been due to the bias of Pakistani exports in favour of men's wear.

Exports 1996-2000 for Pakistan					
Product group	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
842 - WOMEN/GIRL CLOTHING WVEN	154,100	110,765	121,365	106,149	132,609

6. Men/Boy Wear Knit Crochet (843)

Another sub-category is Men/Boy Knit Crochet (843). The main exporters of Men/Boy Knit Crochet are China with 22% of the total export market in the year 2000, U.S.A. which had 7% of the total market share of exports in the year 2000. Pakistan was third with 6.3% of the total market share of exports in the year 2000. Pakistan recorded an annual average increase of 12.3% and Mexico recorded an annual average of 52%.

Exports 1996-2000						
Product: 843 - MEN/BOY WEAR KNIT/CROCH						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	Share in 2000
CHINA	944,299	1,667,502	1,742,624	1,590,651	1,752,221	21.64%
USA	442,385	515,946	504,526	503,812	531,638	6.57%
PAKISTAN	327,115	339,245	436,902	474,903	513,009	6.34%
THAILAND	474,243	500,688	506,431	447,677	435,845	5.38%
HONG KONG	374,619	419,025	405,021	412,297	421,519	5.21%
MEXICO	84,327	177,019	222,933	319,647	414,229	5.12%
INDONESIA	272,248	237,704	192,762	326,498	317,064	3.92%
KOREA REP.	325,056	269,488	303,245	298,362	297,166	3.67%
Total	7,206,484	10035885	8,797,477	8,668,553	8,097,442	100.00%

There has been an increase of 12.4% in the value of total exports of Men/Boy Wear Knit Crochet over the period 1996-2000.

Imports of Men/Boy Wear Knit Crochet had increased by 13.2% over the period 1996-2000. The main importers are U.S.A. with 36.3% of total imports, Hong Kong with 9% and Japan with 8% of the share of total imports of Men/Boy Wear Knit Crochet.

Imports 1996-2000						
Product: 843 - MEN/BOY WEAR KNIT/CROCH						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	Share in 2000
USA	2,575,018	3,074,559	3,411,520	3,386,992	3,514,614	36.30%
HONG KONG	756,817	896,902	827,331	780,140	838,274	8.66%
JAPAN	975,577	821,060	728,920	724,606	806,547	8.33%
UK	577,241	686,759	773,342	779,835	735,061	7.59%
GERMANY	778,575	716,777	756,719	699,314	589,311	6.09%
FRANCE	451,155	447,889	466,394	438,307	405,426	4.19%
ITALY	237,163	262,852	317,696	323,085	298,939	3.09%
MEXICO	78,169	133,640	146,082	201,450	289,857	2.99%
SINGAPORE	219,129	257,859	200,689	207,315	214,461	2.21%

6.1. Pakistan:

Pakistan's exports of Men/Boy Wear Knit Crochet have increased by 57% over the period 1996-2000.

EXPORTS 1996-2000					
Product group	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
843 - MEN/BOY WEAR KNIT/CROCH	327,115	339,245	436,902	474,903	513,009

7. Women/Girl Wear Knit Crochet (844)

Within the apparel segment is also Women/Girl Wear Knit Crochet (844). The main exporters of Women/Girl Wear Knit Crochet are China which had a share of 20% of total exports in the year 2000, Hong Kong which had a share of 9% of total exports and Turkey which had a share of 6.2% of total exports in the year 2000. Mexico has shown tremendous growth during this period, recording an annual average increase of 24%.

Exports 1996-2000						
Product: 844 - WOMEN/GIRL WEAR KNIT/CRO						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	Share in 2000
CHINA	1,689,580	3,813,409	3,369,942	2,890,078	2,857,017	20.13%
HONG KONG	1,063,429	1,226,279	1,303,917	1,324,659	1,282,023	9.03%
TURKEY	1,051,347	1,241,709	1,192,682	959,787	883,944	6.23%
MEXICO	289,339	412,332	498,533	623,042	659,959	4.65%
USA	518,452	618,175	614,466	567,496	586,550	4.13%
ITALY	711,348	675,529	690,213	640,623	550,075	3.87%
KOREA	543,644	530,948	621,360	654,351	546,827	3.85%
GREECE	493,153	446,749	504,567	493,559	484,577	3.41%
Total	12,092,576	16,935,247	15,315,734	15,118,438	14,195,817	100.00%

There has been an increase of 17.4% in the value of exports of Women/Girl Wear Knit Crochet over the period 1996-2000.

Imports of Women/Girl Wear Knit Crochet had increased by 20% from 1996-2000. The main importers include U.S.A. with 31% of total imports, Hong Kong with 11% of total imports and Germany with 9.2% of total imports of Women/Girl Wear Knit Crochet.

Imports 1996-2000						
Product: 844 - WOMEN/GIRL WEAR KNIT/CRO						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	
USA	3,434,199	4,119,254	4,604,954	4,935,482	5,090,795	30.65%
HONG KONG	1,235,542	1,479,282	1,568,605	1,782,204	1,756,954	10.58%
GERMANY	2,030,144	1,827,665	1,913,527	1,748,166	1,525,493	9.19%
JAPAN	1,553,381	1,490,064	1,413,842	1,379,213	1,461,822	8.80%
UK	749,019	960,634	1,077,823	1,059,725	1,131,301	6.81%
FRANCE	934,518	924,266	1,061,628	990,079	984,825	5.93%
MEXICO	180,030	248,977	293,477	318,731	413,209	2.49%
ITALY	263,752	277,111	311,562	345,097	366,408	2.21%
HOLLAND	379,864	1,451,446	357,144	398,534	328,025	1.98%

7.1. Pakistan:

Pakistan's exports of Women/Girl Wear Knit Crochet have increased by 40% over the period 1996-2000.

Exports 1996-2000					
Reporter: PAKISTAN					
Product group	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
844 - WOMEN/GIRL WEAR KNIT/CRO	74,114	62,343	80,335	90,247	103,447

8. Articles of Apparel NES (845)

Another sub-category is Articles of Apparel NES (845). This sub category includes those categories, which are not reported elsewhere. China was the leading exporter of Articles of Apparel NES in the year 2000 and exported approximately 21.5% of total exports for this category. Second was Italy with 8.51% and Hong Kong had approximately 6.3% of total exports for Articles of Apparel NES.

There has been an increase of 23% in the value of total exports for Articles of Apparel NES over the period 1996-2000. Mexico recorded an annual average increase of 22%.

Exports 1996-2000						
Product: 845 - ARTICLES OF APPAREL NES						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	
CHINA	6,371,013	8,021,745	8,212,032	8,952,322	10,963,603	21.53%
ITALY	5,197,994	4,620,204	4,542,293	4,416,930	4,335,122	8.51%
HONG KONG	2,826,175	2,928,889	3,001,597	2,915,135	3,210,756	6.31%
USA	2,211,072	2,562,025	2,545,266	2,876,637	3,136,745	6.16%
MEXICO	1,240,957	1,835,740	2,134,361	2,588,831	2,611,948	5.13%
FRANCE	2,409,064	2,379,117	2,511,190	2,573,543	2,584,093	5.08%
TURKEY	2,113,642	2,253,963	2,531,834	2,383,033	2,382,739	4.68%
GERMANY	1,560,943	1,630,514	1,790,750	1,838,399	1,849,780	3.63%
KOREA REP.	893,788	878,480	1,029,636	1,226,617	1,276,032	2.51%
Total	41,458,515	46,407,414	47,201,932	49,157,742	50,913,503	100.00%

Imports of Articles of Apparel NES have increased as well from 1996-2000 by approximately 32%. The leading importer in the year 2000 was USA with 32% of total imports. Japan had a share of 10% and Germany had a share of 9.5% of total imports for Articles of Apparel NES.

Imports 1996-2000						
Product: 845 - ARTICLES OF APPAREL NES						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	Share in 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	
USA	11,887,892	14,296,970	16,568,884	18,675,408	21,662,896	42.55%
JAPAN	6,107,652	5,296,593	4,887,560	5,548,659	6,765,506	13.29%
GERMANY	7,427,761	6,887,980	7,059,990	6,806,556	6,501,975	12.77%
HONG KONG	4,554,054	4,985,278	4,888,026	5,151,803	5,784,544	11.36%
FRANCE	3,697,451	3,706,102	4,027,009	4,167,120	4,180,999	8.21%
UK	2,838,962	3,348,621	3,680,080	3,942,894	3,991,941	7.84%
ITALY	1,431,839	1,603,110	1,811,001	2,000,247	2,060,954	4.05%
NETHERLAND	1,633,950	2,334,347	1,649,527	1,791,364	1,677,881	2.46%

8.1. Pakistan:

Pakistan's share of exports had decreased by 2% over the period 1996-2000.

Exports 1996-2000					
Reporter: PAKISTAN					
Product group	1996	1997	1998	1999	2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
845 - ARTICLES OF APPAREL NES	318,230	285,367	266,875	266,622	311,711

9. Clothing Accessories (846)

One of the sub-categories of the apparel segment is Clothing Accessories (846). Italy was the leading exporter of Clothing Accessories in the year 2000 with a share of 17.3%. Second was China with 16% of total exports and third was USA with 13% of total exports of Clothing Accessories.

There has been an increase of 10% in the value of exports of Clothing Accessories for the period 1996-2000. Hong Kong has shown an impressive annual average growth rate of 20.3% during this period.

Exports 1996-2000					
Product: 846 - CLOTHING ACCESSORIES					
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
ITALY	2,441,789	2,356,640	2,346,995	2,106,946	1,947,510
CHINA	1,031,072	1,713,581	1,654,325	1,374,697	1,779,526
USA	1,240,811	1,501,084	1,874,097	1,492,410	1,457,481
KOREA REP.	635,915	624,839	581,205	661,862	773,665
UNTD KINGDOM	561,569	680,606	711,278	652,283	708,569
HONG KONG	240,710	308,568	404,197	463,857	497,676
GERMANY	551,533	533,719	534,618	521,203	450,603
Total	10,207,794	11,402,881	11,684,315	11,179,020	11,232,360

Imports of Clothing Accessories increased by 8.7% during the period 1996-2000. USA was the leading importer in the year 2000 with approximately 19% of total imports. Second was Japan with 11% of total imports and Hong Kong was third with 10.25% of total imports of Clothing Accessories.

Imports 1996-2000						
Product: 846 - CLOTHING ACCESSORIES						
Reporter	Value 1996	Value 1997	Value 1998	Value 1999	Value 2000	
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000	Share in 2000
USA	1,319,059	1,628,183	1,749,143	1,900,527	2,178,723	18.92%
JAPAN	1,106,272	971,287	864,611	953,091	1,247,426	10.83%
HONG KONG	697,419	1,012,435	1,102,302	1,166,941	1,180,639	10.25%
GERMANY	1,381,424	1,239,807	1,181,764	1,130,084	971,706	8.44%
FRANCE	664,823	656,350	691,376	682,415	675,574	5.87%
UK	520,833	626,443	622,164	638,492	647,761	5.62%
MEXICO	350,560	616,548	687,663	579,033	561,193	4.87%
CHINA	683,959	642,678	575,362	504,286	441,127	3.83%
NETHERLAND	301,264	318,196	277,608	277,617	256,915	2.23%
ITALY	186,324	191,527	208,726	231,611	252,901	2.20%
TOTAL	10,591,045	11,295,563	11,403,582	11,268,841	11,516,102	100.00%

9.1. Pakistan:

Pakistan's exports of Clothing Accessories have decreased by 11% over the period 1996-2000.

Exports 1996-2000					
Reporter: PAKISTAN					
Product group	1996	1997	1998	1999	2000
	US\$ '000	US\$ '000	US\$ '000	US\$ '000	US\$ '000
846 - CLOTHING ACCESSORIES	161,662	146,352	117,115	122,709	143,796

10. Industry Structure in Pakistan

The total number of units in the apparel segment in 2000-01 was 4500. Out of these 80% are cottage based/small units and 20% are industrial units. Total installed capacity was 650,000 machines, out of which 200,000 machines are industrial sewing machines used by the industrial units and the rest of the 450,000 machines are the home workers/domestic sewing machines used in the cottage based small units. Production in 1972-73 was 9.5 million pieces, which in 2000-01 had increased to 685 million pieces. The majority of the manufacturing units are located in Karachi and Lahore. Other important areas include Faisalabad, Gujranwala, Quetta, Rawalpindi and Sialkot.

The apparel manufacturing sector also becomes important as it has huge potential to create employment with low investment levels. Due to the labour intensive nature of the industry it currently employs an estimated number of 700,000 individuals. In the knit garments manufacturing sector there is a strong tendency to have integrated manufacturing facilities, which not only produce the fabric but also stitch it to garments. However, in the woven segment there are standalone stitching units due to heavy investments in weaving and processing industries.

Year	Installed Capacity (million pieces)
1972-73	9.5
1982-83	10.52
1996-97	650
1997-98	665
1998-99	670
2000-2001	685