



IDENTIFYING POTENTIAL OPPORTUNITIES FOR ENHANCING PAKISTAN'S EXPORT GROWTH AND DIVERSIFICATION

MARKET ACCESS SERIES



Identifying Potential Opportunities for Enhancing Pakistan's Export Growth and Diversification

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The Pakistan Business Council (PBC)

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- To promote and facilitate the integration of businesses in Pakistan into the World economy and to encourage in the development and growth of Pakistani multinationals.
- To interact with governments in the economic development of Pakistan and to facilitate, foster and further the economic, social and human resource development of Pakistan.

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LIST OF ABBREVIATION

EU	European Union
EMDI	Export Market Diversification Index
EPI	Export Potential Indicator
FBR	Federal Board of Revenue
FDI	Foreign Direct Investment
FY	Fiscal Year
GDP	Gross Domestic Product
GVC	Global Value Chain
HS	Harmonized System
IMF	International Monetary Fund
ITC	International Trade Centre
LPI	Logistics Performance Index
PDI	Product Diversification Index
SBP	State Bank of Pakistan
SECP	Securities and Exchange Commission of Pakistan
UAE	United Arab Emirates
UK	United Kingdom
UNIDO	United Nation Industrial Development Organization
USA	United States of America
WDI	World Development Indicators
WTO	World Trade Organization

EXECUTIVE SUMMARY



EXECUTIVE SUMMARY

1. Pakistan's macroeconomic outlook

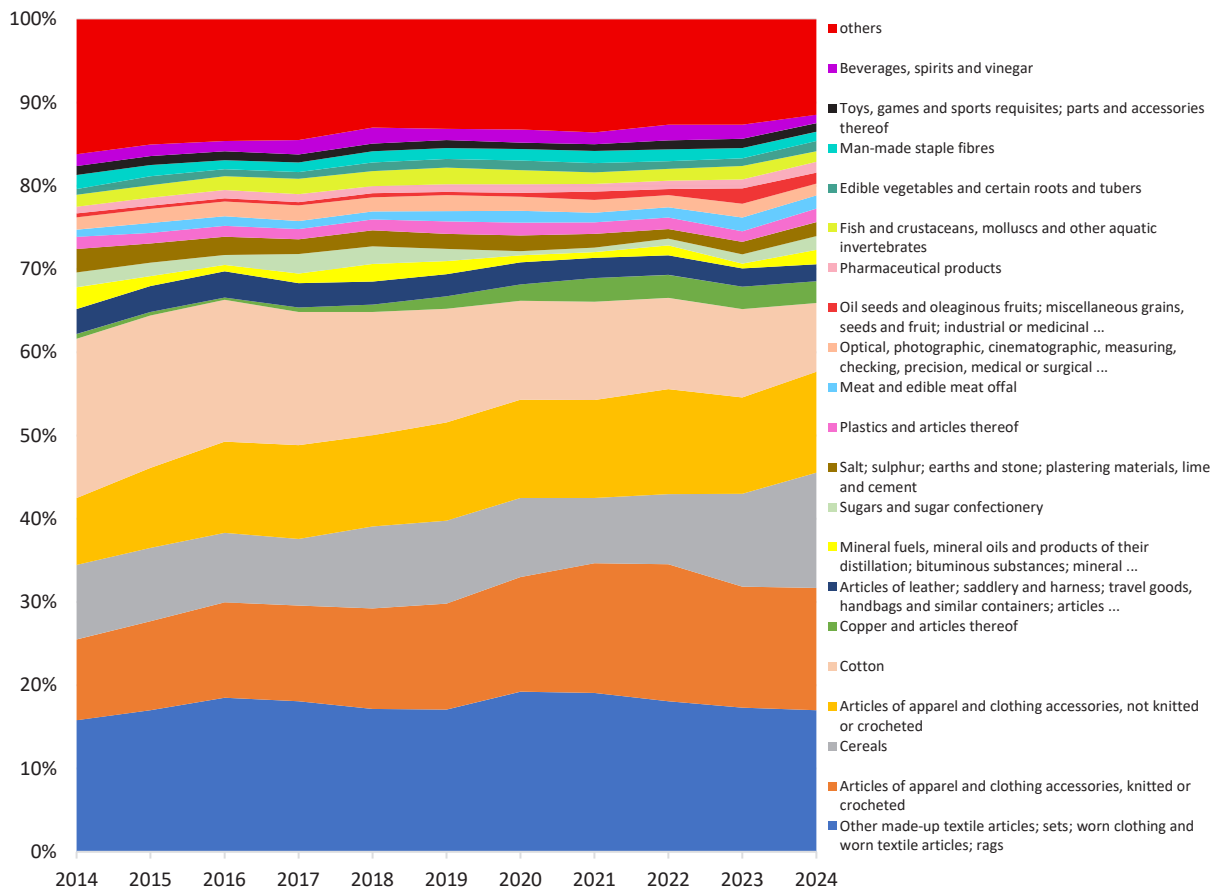
The analysis shows that Pakistan's macroeconomic structure has historically been characterized by growth volatility, driven primarily by domestic consumption rather than export expansion. Persistent fiscal and external imbalances, recurring current account deficits, and a reliance on external financing have remained defining features of the economy. Although temporary improvements in the external account have occurred in certain periods, these have largely resulted from import compression and remittance inflows rather than sustained export growth. Consequently, Pakistan's external sector has remained vulnerable to cyclical shocks, rising debt pressures, and fluctuations in foreign exchange reserves.

2. Export Structure and Concentration

2.1 Sectoral Export Concentration

Pakistan's exports are highly concentrated in a narrow set of sectors, reflecting limited structural diversification. The export basket is dominated by a few traditional sectors, particularly textiles and apparel, along with selected agricultural products. In 2024, a small number of HS-2 sectors accounted for the majority of total exports, indicating strong dependence on a limited base. This persistent concentration increases vulnerability to external shocks, including changes in global demand, price volatility, and supply chain disruptions.

Figure 1: Distribution of Pakistan's Exports Across Sectors

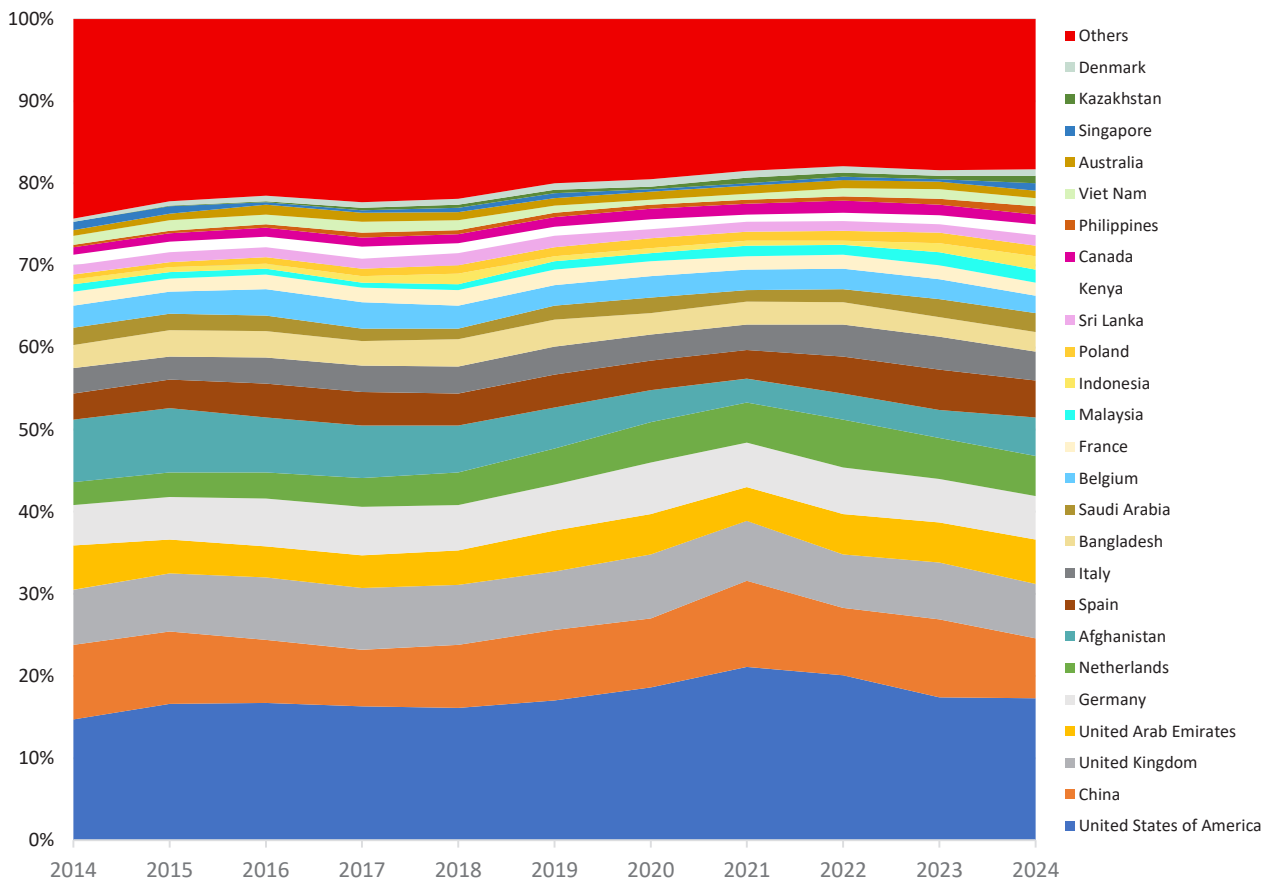


Source: ITC

2.2 Export Market Dependence

Pakistan's export markets show moderate geographical diversification but remain dependent on a limited set of key destinations. The United States, the European Union, the United Kingdom, China, and the United Arab Emirates collectively account for a substantial share of total exports. While exports are distributed across many countries, the underlying structure remains concentrated, with most export earnings derived from a small number of markets. This dependence exposes the export sector to demand fluctuations and policy changes in a few key economies.

Figure 2: Distribution of Pakistan's Exports Across Global Markets

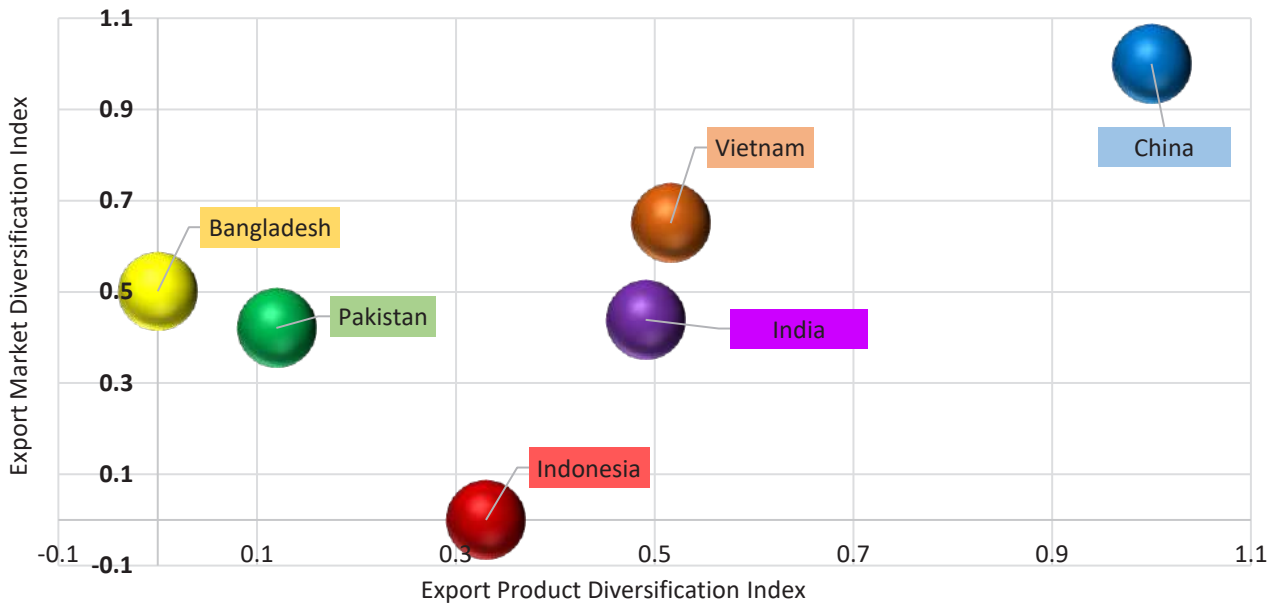


Source ITC

3. Comparative Export Diversification Performance

Pakistan exhibits relatively lower export diversification compared to leading Asian economies such as China, Vietnam, and India. These countries show strong performance in both product and market diversification, reflecting broader export bases and stronger alignment with global demand structures. In contrast, Pakistan is positioned in the lower-middle segment, indicating moderate market diversification but limited product diversification. This suggests structural concentration and weaker integration into diversified global value chains.

Figure 3: Comparative Overview of Export Diversification Performance



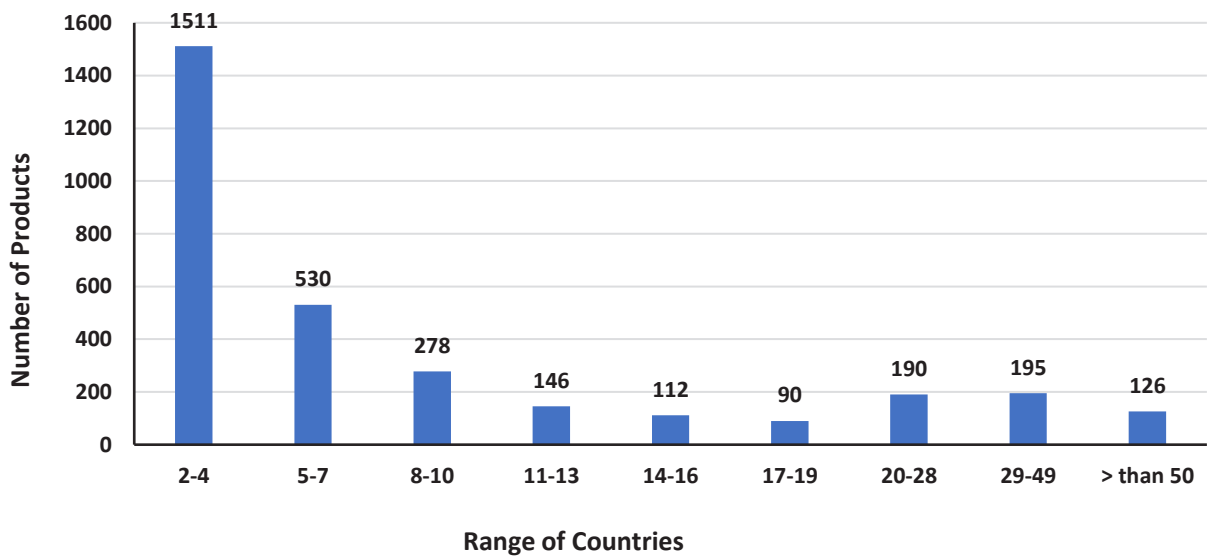
Source: ITC

4. Export Reach and Market Penetration of Products

A significant share of Pakistan's exported products has limited global reach, with nearly half exported to fewer than five countries. Only a small number of products achieve broad international penetration across more than 50 markets. Similarly, export markets differ widely in the number of products they import from Pakistan, with the UAE, USA, UK, and Germany showing relatively deeper product coverage compared to many other destinations.

This indicates weak global diffusion of Pakistan's export basket and highlights significant untapped potential for expanding the geographical reach of existing products.

Figure 4: Product Market Reach Across Destinations

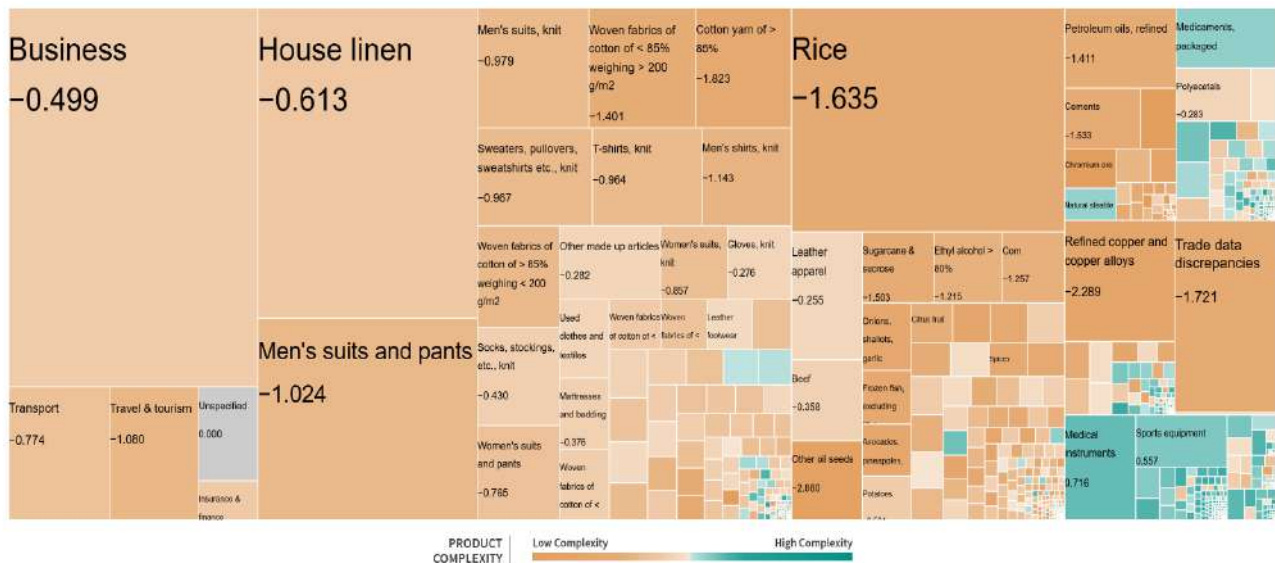


Source: WITS

5 Low Product Complexity in Pakistan's Export Structure

Pakistan's export basket is largely concentrated in low-complexity products, particularly textiles and primary agricultural goods including house linen, garments, cotton yarn, and rice. These products involve limited technological sophistication and low value addition. In contrast, high-complexity products, including machinery and medical instruments, constitute only a small share of exports. This indicates that Pakistan's exports remain insufficiently diversified and weakly integrated into advanced global value chains, highlighting the need to promote technology-intensive and high value-added industries to improve export competitiveness and sustainable growth.

Figure 5: Product Complexity¹ of Pakistan's Export Basket, 2024



Source: The Atlas of Economic Complexity

6 Pakistan's Export Potential Across Major International Markets

The analysis of Pakistan's export potential across major international markets reveals substantial unrealized export opportunities, particularly in textiles and apparel, agricultural commodities, and selected industrial goods. Across all destinations—including the US, EU, UK, China, Gulf, and regional markets—Pakistan consistently shows a strong existing export base but remains below its estimated export potential in several HS-6 products. The largest gaps are concentrated in value-added cotton textiles, home textiles, rice varieties, fruits (mangoes and citrus), sesame seeds, seafood, leather products, and intermediate industrial inputs such as copper, PET, and chemicals. Developed markets offer high-value but compliance-intensive opportunities constrained by barriers, while regional markets provide relatively easier access with strong demand for food items and basic manufactures. Pakistan's export underperformance is driven less by lack of demand and more by issues of competitiveness, product upgrading, and compliance, highlighting significant scope for export expansion within existing markets.

1 Product Complexity Index (PCI) measures the sophistication and knowledge intensity required to produce a product. Products with higher complexity are typically manufactured by fewer countries possessing advanced productive capabilities, technological know-how, and specialized skills. A higher PCI value suggests greater value addition and stronger productive knowledge embedded in the product.

7 Export Diversification Opportunities

The analysis of Pakistan's export diversification opportunities across selected international markets highlights substantial untapped potential to broaden the country's export base beyond its current concentration. Across major destinations including the USA, EU, UK, China and key regional markets, significant opportunities emerge in products where Pakistan has limited current export presence despite strong import demand in these markets. The most prominent sectors include industrial and intermediate goods such as steel products, fertilizers, chemical inputs, rubber and plastics, vehicle wiring sets, and construction-related materials; agro-based commodities including rice varieties, lentils, chickpeas, sesame seeds, fruits, sugar, palm oil, and edible oils; and seafood products such as shrimp, tuna, and rock lobster. Textile-related products, including yarns, knitted fabrics, floor coverings, and value-added garments, also show consistent diversification potential, alongside selected consumer and light manufacturing goods such as footwear, ceramics, sanitary fixtures, notebooks, wigs, and household items. Developed markets such as the USA, EU, and UK offer high-value opportunities, while Gulf and regional markets provide comparatively easier access with strong demand for food products and basic manufactures. East and Southeast Asian markets further highlight opportunities in industrial inputs and manufacturing-linked exports. The broad-based export diversification potential across agro-based, industrial, textile, seafood, and light manufacturing sectors, offer clear scope to expand and strengthen Pakistan's export structure.

8 Competitiveness of existing products with untapped potential

The competitiveness analysis of Pakistan's export products across major international markets reveals that while Pakistan has an established presence in several HS-6 product categories with untapped export potential, its overall positioning is largely concentrated in price-sensitive and mid-to-lower value segments.

In most developed markets, including the USA, EU, UK, and Germany, Pakistan's exports remain competitive primarily in terms of cost efficiency rather than value addition. Unit value comparisons consistently show a gap between Pakistan and higher-income suppliers that dominate premium segments through stronger differentiation, branding, and quality upgrading.

In emerging and regional markets such as the UAE, Afghanistan, Bangladesh, and parts of Asia, Pakistan demonstrates stronger market shares and, in some cases, dominant supply positions, particularly in agro-based commodities, textiles, and basic manufactured goods. However, these gains are also largely driven by proximity advantages and competitive pricing rather than movement into higher-value product tiers.

9. Competitiveness in newly identified products

Competitiveness analysis of new export products with diversification potential across major international markets, including the USA, China, UK, UAE, Germany, Netherlands, Afghanistan, and Bangladesh has been done. The analysis evaluates market structures, supplier concentration, and unit value variations to assess Pakistan's potential positioning in previously underdeveloped export categories.

In developed markets, including the USA, UK, Germany, and the Netherlands, supply structures are highly competitive and dominated by established exporters such as China, India, Türkiye, and Vietnam. Pakistan's diversification potential is largely concentrated in niche and selectively differentiated product segments, although strong incumbency advantages and higher quality requirements limit competitiveness in standardized products.

In emerging and regional markets such as the UAE, Afghanistan, Bangladesh, and parts of Asia, Pakistan demonstrates relatively stronger diversification prospects due to geographic proximity and established trade linkages. However, opportunities remain concentrated mainly in standardized and price-competitive product categories.

10. Challenges to Export Growth and Diversification

Pakistan's export growth and diversification continue to be constrained by a range of structural, institutional, and macroeconomic challenges. Despite considerable export potential across several sectors, persistent weaknesses in infrastructure and logistics, low productivity, regulatory inefficiencies, macroeconomic instability, and policy inconsistency have limited the country's ability to expand its export base, improve competitiveness, and move toward higher value-added and diversified exports.

i) Infrastructure and Logistics Constraints

Weak transport infrastructure, inefficient logistics systems, and high trade costs continue to undermine export competitiveness. Heavy reliance on road freight, port inefficiencies, inadequate warehousing, and limited cold-chain facilities increase production and shipment costs while reducing reliability for exporters. These weaknesses restrict integration into global value chains and constrain diversification into high-value and time-sensitive export sectors.

ii) Productivity and Competitiveness Constraints

Low productivity remains a key structural barrier to export growth and diversification. Persistent boom-bust economic cycles, weak industrial efficiency, low product quality, high production costs, and limited branding capacity reduce Pakistan's competitiveness in international markets. Export performance remains concentrated in low-value segments, with insufficient movement toward technology-intensive and higher value-added exports.

iii) Regulatory and Institutional Barriers

Regulatory complexity, weak institutional coordination, and high compliance costs continue to increase the cost of doing business in Pakistan. Lengthy procedures, governance weaknesses, financial exclusion, and limited access to formal credit particularly constrain small and medium enterprises (SMEs), restricting firms' ability to expand exports, adopt new technologies, and meet international standards.

iv) Macroeconomic Instability

Persistent macroeconomic instability continues to weaken export performance through exchange rate volatility, inflationary pressures, and recurring external imbalances. Rising energy costs, higher interest rates, and global supply disruptions increase uncertainty for exporters and discourage long-term investment in export-oriented industries, limiting competitiveness and diversification potential.

v) Political Instability and Policy Inconsistency

Political instability and inconsistent policy implementation remain major constraints to export expansion. Frequent policy shifts, weak institutional continuity, and regulatory uncertainty reduce investor confidence and undermine long-term export planning. These challenges weaken policy credibility and limit Pakistan's ability to integrate effectively into global value chains.

11 Policy Recommendations

This study highlights the need for a targeted and product-specific export strategy to address Pakistan's high export concentration and weak diversification performance. Policy priorities need to focus on expanding exports in HS-6 level product categories with untapped potential, particularly in processed foods, fisheries, pharmaceuticals, chemicals, light manufacturing, and selected industrial goods.

i) Targeted Export Diversification

Reducing export concentration requires shifting from broad sector-based support toward targeted promotion of products with unrealized export potential. Greater emphasis should be placed on diversifying into new export categories with stronger growth prospects in international markets.

ii) Upgrading Competitiveness within Existing Exports

Pakistan's exports remain concentrated in low-to-mid value segments across major destinations. Improving quality, product differentiation, branding, and value addition—particularly in textiles, apparel, rice, and agro-based goods—is essential to access /higher-value market segments.

iii) Market-Specific Export Strategies

Export competitiveness varies significantly across destinations, requiring tailored market strategies. Developed economies demand compliance, certifications, and higher-value products, while regional and emerging markets provide opportunities in price-sensitive and intermediate goods.

iv) Priority Sectors for Export Expansion

Sectors such as pharmaceuticals, processed foods, fisheries, technical textiles, and selected manufactured products demonstrate relatively strong competitiveness across multiple markets and should receive greater investment and export support.

v) Realizing Agro-Food Export Potential

Significant unrealized opportunities exist in rice, fruits, vegetables, seafood, spices, and processed food products. Improving grading, packaging, processing, and cold-chain logistics can strengthen competitiveness in higher-value agro-food exports.

vi) Export Clusters and Industrial Development

Developing specialized export clusters in agro-processing, fisheries, textiles, and light manufacturing can improve productivity, scale efficiency, quality standards, and export readiness in high-potential sectors.

vii) Trade Intelligence and Product-Market Matching

Improved trade intelligence systems are required to better align export products with market-specific demand. Greater use of product-level analysis, buyer networks, and targeted promotion can improve export penetration and diversification outcomes.

viii) Logistics, Productivity, and Institutional Reforms

Addressing infrastructure bottlenecks, weak productivity, financial constraints, and regulatory inefficiencies remains essential for long-term export competitiveness. Strengthening logistics systems, trade facilitation, access to finance, technology upgrading, and institutional coordination will be critical for sustaining export growth and diversification.

Objective of the Study

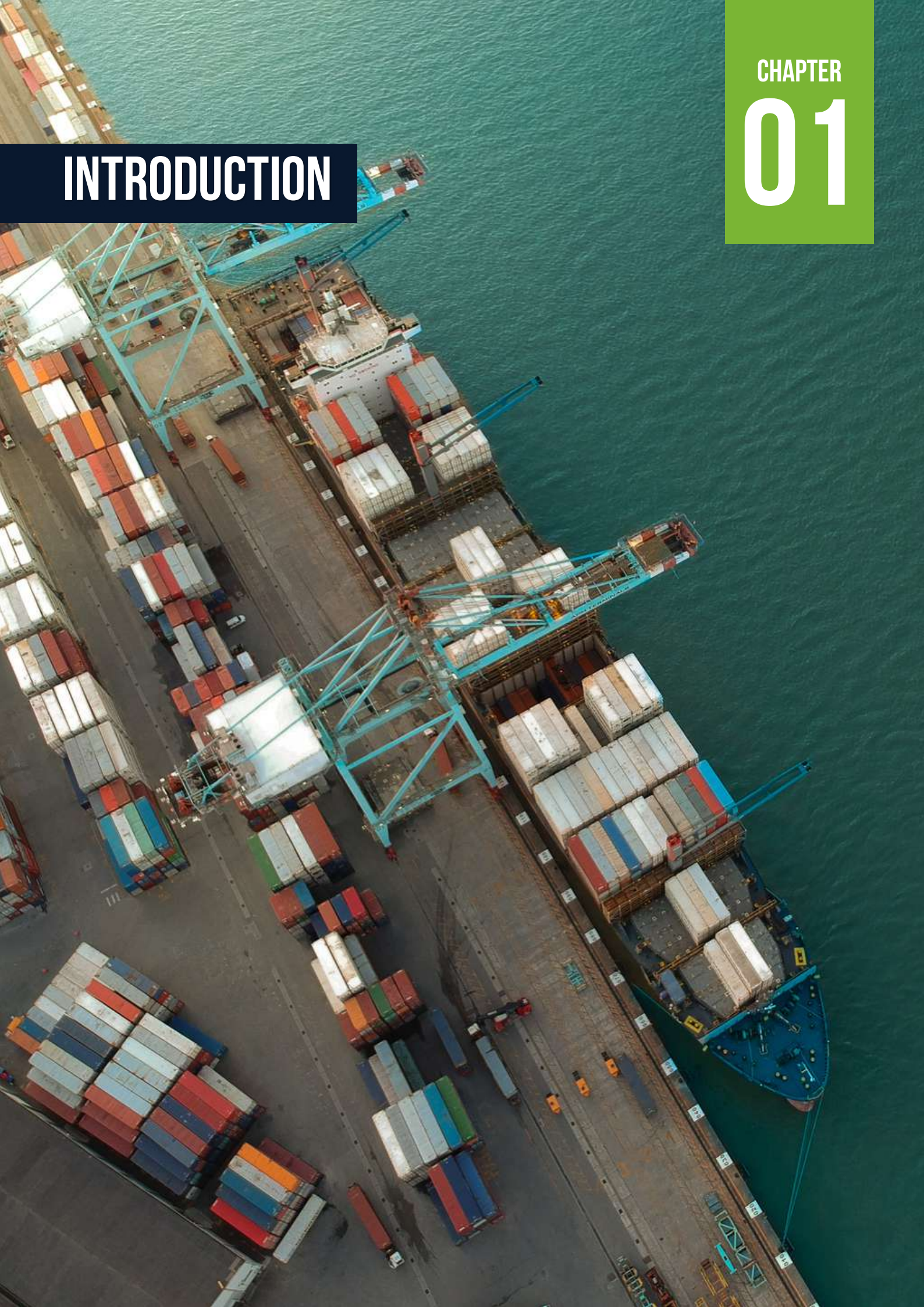
The main objective of this study is to analyze Pakistan's export structure and assess its composition, geographical distribution, and degree of market penetration across destination markets. The study further aims to identify key constraints and bottlenecks that limit export performance and prevent Pakistan from fully realizing its export potential in both existing and emerging global markets.

Specifically, the study examines the concentration of exports across products and regions, evaluates the alignment between Pakistan's export basket and global import demand, and highlights instances of export misallocation across markets. It also assesses export potential within existing product categories across different destinations and identifies opportunities for diversification based on Pakistan's revealed export capabilities.

Furthermore, the study uses unit value comparisons to examine competitive positioning in international markets and identifies competing countries for both existing and potential export products. Finally, it draws on existing literature to outline structural, institutional, and policy-related constraints affecting export performance, and synthesizes these findings to provide evidence-based insights for export diversification in Pakistan.

Limitations of the Study

- Based on secondary data, which may include reporting and measurement inconsistencies.
- Does not capture informal or unrecorded trade flows relevant to Pakistan.
- Export potential analysis uses trade patterns and unit values, excluding non-price factors (quality, branding, firm capabilities etc.).
- Descriptive approach; no econometric analysis to establish causality.
- Comparison limited to selected peer countries, restricting wider generalization.



INTRODUCTION

CHAPTER 01

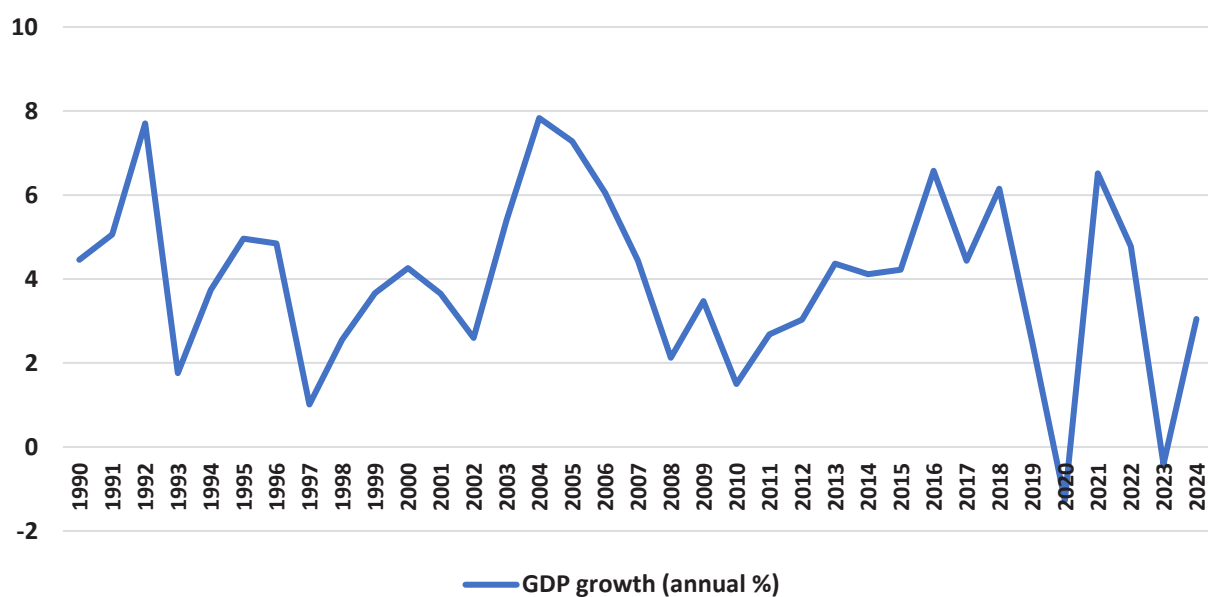
Chapter 1

INTRODUCTION

1.1 Pakistan's GDP growth

Pakistan's GDP growth has exhibited considerable fluctuations over the period 1990–2024, reflecting periods of expansion, slowdown, and economic shocks. During the 1990s and early 2000s, growth remained volatile with notable slowdowns in 1993 and 1997, followed by a strong recovery phase during 2003–2007 when growth peaked at around 8 percent. However, growth moderated after 2008, reflecting structural constraints and external vulnerabilities. A moderate recovery was observed during 2016–2018, before a sharp contraction in 2020 due to the COVID-19 pandemic. Although the economy rebounded in 2021–2022, growth weakened again in subsequent years amid macroeconomic imbalances, inflationary pressures, and stabilization measures. This fluctuating growth trajectory highlights the importance of strengthening export performance and diversification to achieve sustainable and stable economic growth in Pakistan.

Figure 1.1 Pakistan's GDP Growth

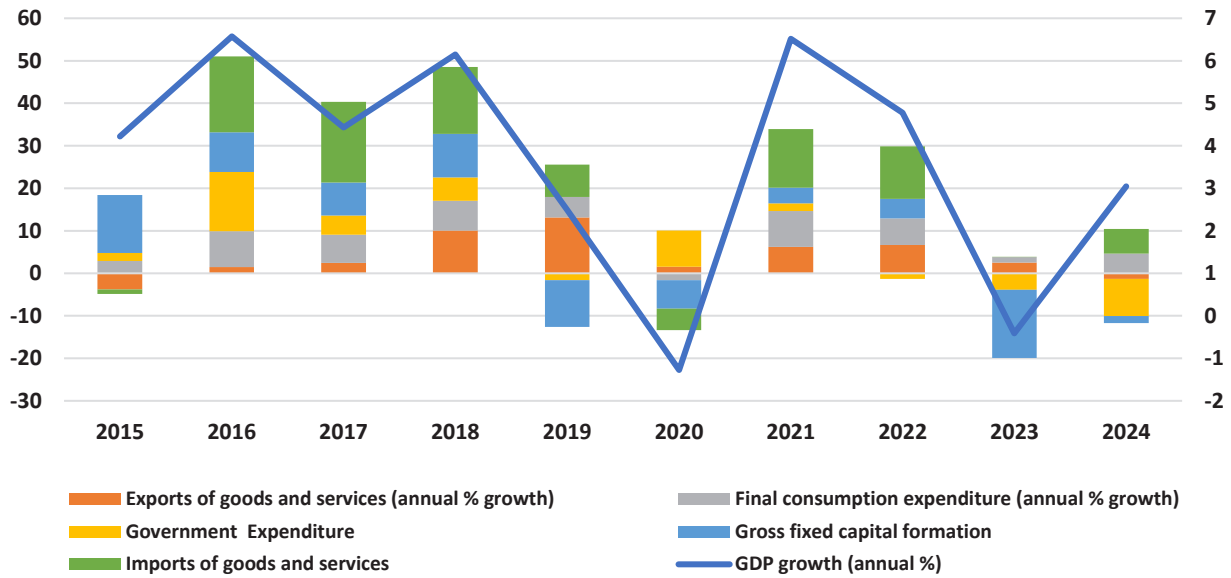


Source: World Bank WDI

1.2 Drivers of GDP Growth in Pakistan (2015–2024)

Figure 1.2 illustrates the contribution of key expenditure components to Pakistan's GDP growth during 2015–2024. The results indicate that private/final consumption expenditure remained a major driver of economic growth across most years, while the contribution of gross fixed capital formation (GFCF) and exports of goods and services was relatively volatile. During the relatively high-growth period of 2016–2018, GDP expansion was supported by stronger domestic demand, increased imports, and improved investment activity, indicating a consumption- and investment-led growth pattern. However, economic growth weakened in 2019–2020, reflecting declining investment and disruptions in economic activity, with GDP contracting in 2020. A temporary recovery was observed in 2021–2022, supported by improvements in consumption, exports, and investments. Nevertheless, growth slowed again in 2023–2024 amid macroeconomic stabilization measures, inflationary pressures, and external sector constraints. The comparatively limited contribution of exports to overall growth highlights persistent structural weaknesses in Pakistan's export sector and underscores the importance of export promotion and diversification for achieving sustainable and stable economic growth.

Figure 1.2 Expenditure Components contribution in GDP growth

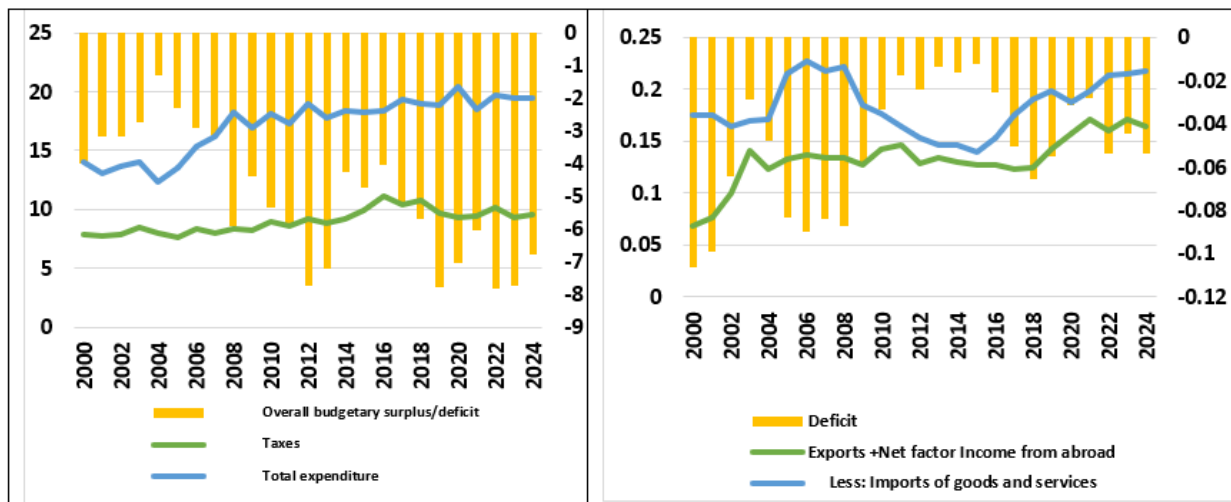


Source: World Bank WDI

1.3 Macroeconomic Imbalances: Fiscal and External Sector Trends

Figure 1.3 illustrates Pakistan's fiscal and external sector imbalances during 2000–2024. The fiscal position remained under pressure as government expenditure consistently exceeded tax revenues, resulting in persistent fiscal deficits despite gradual improvements in tax collection. On the external side, imports of goods and services generally exceeded exports and net factor income from abroad, reflecting recurring external imbalances. During periods of higher economic growth, import demand increased substantially, while export earnings remained relatively limited and concentrated in a narrow range of products. These trends highlight the importance of export promotion and diversification to strengthen external stability, reduce import dependence, and support sustainable economic growth in Pakistan.

Figure 1.3 Fiscal and External Sector Imbalances in Pakistan, 2000–2024



Source: Key Indicators ADB

1.4 External Sector and Financial Account Developments (2016–2024)

Pakistan's external sector showed persistent imbalances over 2016–2024, reflecting structural weaknesses relevant to export growth and diversification.

The current account balance remained in deficit for most of the period, widening in 2017 (-4.77% of GDP) and 2018 (-5.30%) before gradually improving and turning slightly positive in 2024 (0.13%). This improvement appears cyclical, driven largely by import compression and remittances rather than strong export expansion.

The net financial account remained volatile and mostly negative, indicating reliance on external borrowing and unstable capital inflows rather than sustained foreign direct investment. The net capital account remained marginal and insufficient to offset external pressures.

External debt stocks increased significantly from 23.96% of GDP in 2016 to a peak of 39.26% in 2020, before easing slightly but remaining elevated at 34.91% of GDP in 2024. This reflects persistent financing needs arising from external deficits.

The external position remains vulnerable due to weak export performance, highlighting the need for export diversification and a shift toward more stable, FDI-led external financing.

Table 1.1 Pakistan's External Sector and Financial Account Indicators (% of GDP), 2016–2024

Indicators	2016	2017	2018	2019	2020	2021	2022	2023	2024
External debt stocks, Total (% of GDP)	23.96	27.44	28.11	34.31	39.26	37.52	34.04	38.91	34.91
Current account balance (% of GDP)	-2.29	-4.77	-5.3	-2.67	-0.22	-3.52	-3.26	-0.31	0.13
Net capital account (% of GDP)	0.07	0.13	0.09	0.09	0.07	0.06	0.11	0.05	0.05
Net financial Account (% of GDP)	-1.98	-4.74	-5.31	-2.51	-0.4	-3.59	-3.2	-0.59	0.14

Source: WDI, PBS

1.5 Foreign Exchange Reserves of Pakistan (2020–2025)

Table 1.2 shows significant fluctuations in Pakistan's foreign exchange reserves over 2020–21 to 2024–25. Total liquid reserves declined sharply from \$24.4 billion in 2020–21 to a low of \$9.2 billion in 2022–23, reflecting external payment pressures, current account deficits, and reduced capital inflows. This period indicates acute external vulnerability and tight balance of payments conditions.

Reserves recovered from the low of \$9.2 billion in 2021–22, rising to \$14.0 billion in 2023–24 and \$19.3 billion in 2024–25, suggesting partial stabilization in external financing conditions. However, recovery remains below the 2020–21 level.

SBP-held reserves show the greatest volatility, falling from \$17.3 billion to \$4.4 billion before rebounding to \$14.5 billion, indicating reliance on official reserves to manage external shocks. Bank-held reserves remained relatively stable throughout the period.

Overall, the trend reflects Pakistan's dependence on external inflows to sustain reserve adequacy, with continued vulnerability to current account pressures and financing constraints, consistent with IMF concerns regarding external sector fragility.

Table 1.2 Foreign Exchange Reserves of Pakistan (2020-2025)

Years	NET RESERVES WITH SBP (\$ in Million)	NET RESERVES WITH BANKS (\$ in Million)	TOTAL LIQUID FX RESERVES (\$ in Million)
2020-21	17,298.60	7,099.00	24,397.60
2021-22	9,814.70	5,635.20	15,449.90
2022-23	4,445.10	4,714.90	9,160.00
2023-24	9,389.60	4,606.70	13,996.30
2024-25	14,505.80	4,763.40	19,269.20

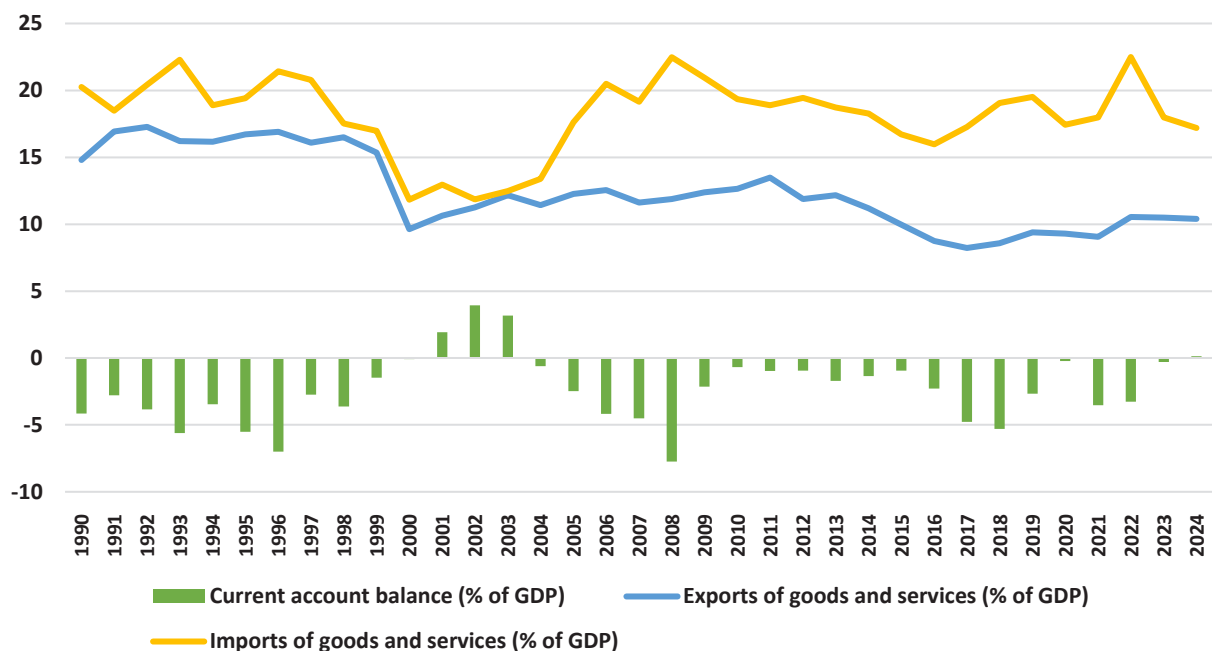
Source: SBP

1.6 Pakistan's Export Performance

Figure 1.4 presents the trends in Pakistan's exports of goods and services, imports of goods and services, and current account balance as percentages of GDP during 1990–2024. The graph shows that imports consistently remained higher than exports throughout the period, resulting in a persistent current account deficit.

Exports as a share of GDP fluctuated over time, reaching relatively higher levels during the early 2000s, but declining in recent years. Imports also showed considerable variation, with noticeable increases during periods of higher domestic demand. Consequently, the current account balance remained negative for most years, although the size of the deficit varied over time.

This persistent gap between exports and imports has contributed to Pakistan's macroeconomic challenges by increasing external financing needs, putting pressure on foreign exchange reserves, and contributing to exchange rate instability. The continued current account deficits also reflect the economy's dependence on imports and weak export growth, limiting sustainable economic stability.

Figure 1.4 Exports, Imports, and Current Account Balance (% of GDP)


Source: WDI

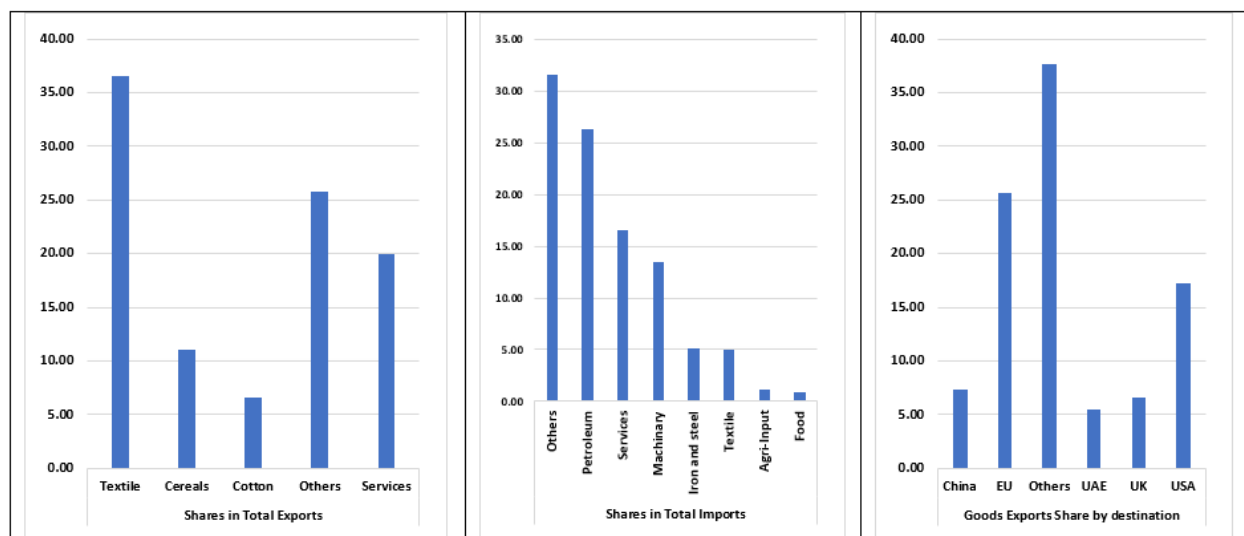
1.7 Distribution of Pakistan's Exports, Imports, and Export Destinations

Pakistan export structure is concentrated in few sectors, with textiles accounting for the largest share of total exports (36.4%), followed by other products (25.5%), services (19.8%), cereals (10.9%), and cotton (6.4%).

Similarly, the import structure is distributed mainly across other products (31.4%), petroleum (26.2%), services (16.4%), and machinery (13.4%), while smaller shares are contributed by iron and steel, textiles, agricultural inputs, and food products. This pattern reflects the sectoral composition of Pakistan's import demand.

In terms of export destinations, Pakistan's exports are distributed across multiple markets, with the largest share directed toward the European Union (25.4%) followed by the United States (17.1%) and comparatively smaller shares are exported to China, the United Kingdom, and the UAE.

Figure 1.5 Distribution of Pakistan's Exports, Imports, and Export Destinations, 2024



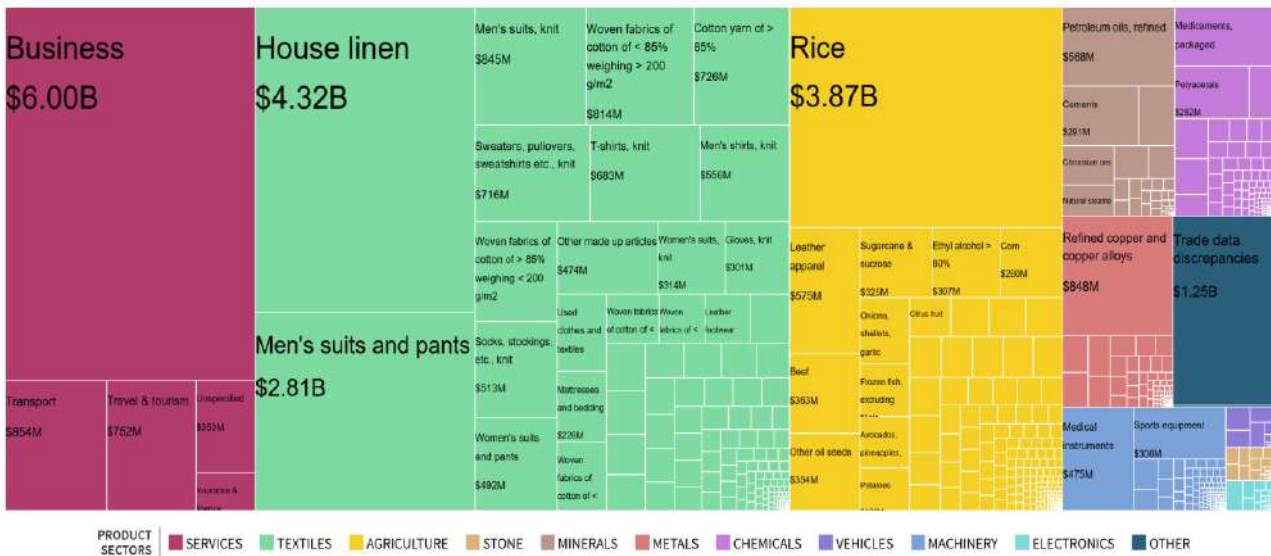
Source: ITC

1.8 Pakistan's Export Composition by Products and Sectors, 2024

Pakistan's export structure in 2024 reflects a high degree of concentration in a limited number of sectors and products. As illustrated in Figure 1.6, the country's exports are heavily dominated by textiles, agriculture, and selected service-related activities, while several high value-added and technology-intensive sectors continue to contribute only marginally to total exports. Textile-related products, including house linen, men's suits and pants, knitted garments, and woven fabrics, account for a substantial share of Pakistan's export earnings, whereas agricultural products such as rice also remain among the leading export items.

The concentration of exports in a few traditional sectors indicates limited diversification in Pakistan's export basket. Such dependence increases the economy's vulnerability to external shocks, fluctuations in global demand, changing international market conditions, and sector-specific disruptions. At the same time, it highlights the need to identify new products, markets, and value-added industries that can strengthen Pakistan's export competitiveness and improve long-term export sustainability.

Figure 1.6 Pakistan's Export Composition by Product Sectors, 2024

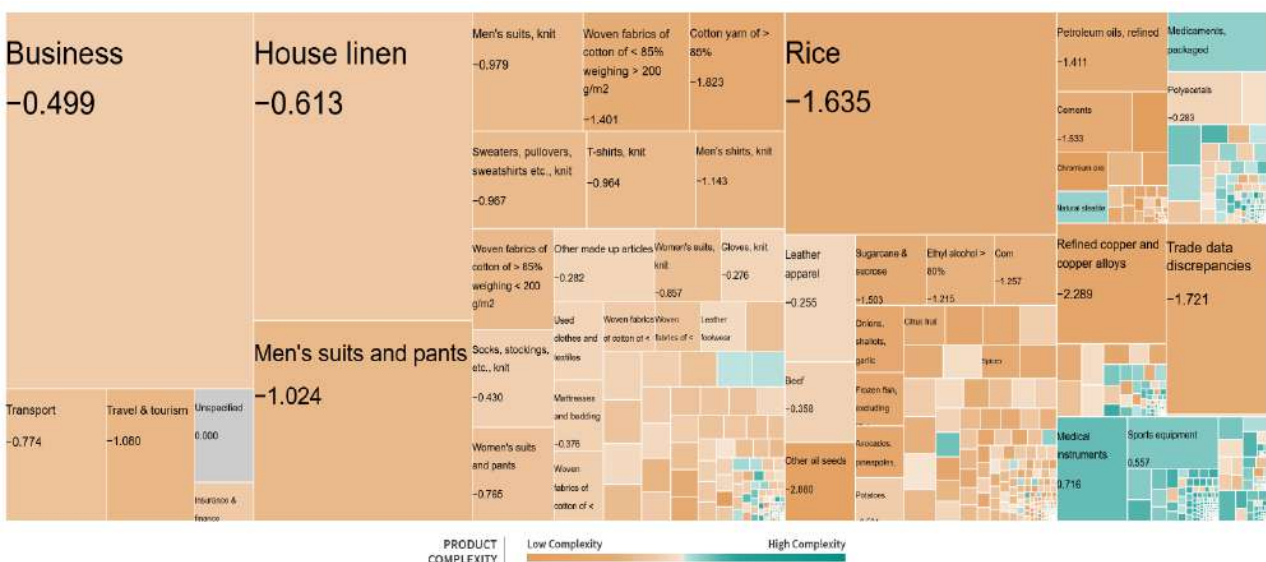


Source: The Atlas of Economic Complexity

1.9 Low Product Complexity in Pakistan's Export Structure

Figure 1.7 shows that Pakistan's export basket is largely concentrated in low-complexity products, particularly textiles and primary agricultural goods such as house linen, garments, cotton yarn, and rice. These products involve limited technological sophistication and low value addition. In contrast, high-complexity products, including machinery and medical instruments, constitute only a small share of exports. This indicates that Pakistan's exports remain insufficiently diversified and weakly integrated into advanced global value chains, highlighting the need to promote technology-intensive and high value-added industries to improve export competitiveness and sustainable growth.

Figure 1.7 Product Complexity² of Pakistan's Export Basket, 2024



Source: The Atlas of Economic Complexity

2 Product Complexity Index (PCI) measures the sophistication and knowledge intensity required to produce a product. Products with higher complexity are typically manufactured by fewer countries possessing advanced productive capabilities, technological know-how, and specialized skills. A higher PCI value suggests greater value addition and stronger productive knowledge embedded in the product.

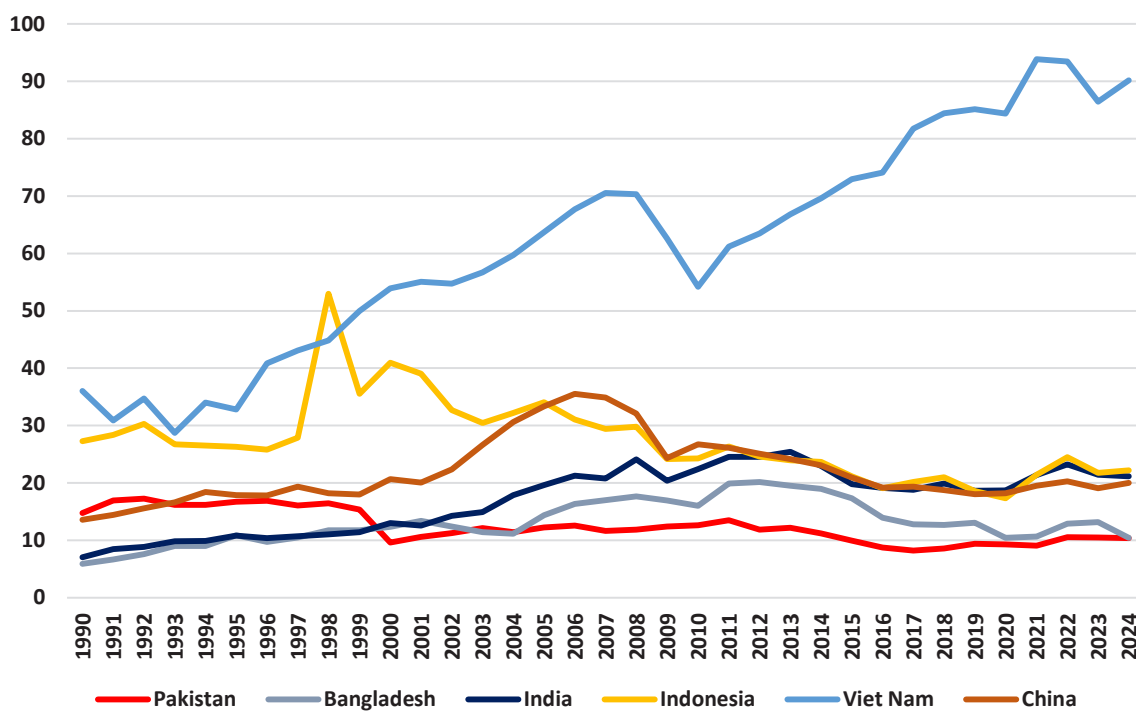
1.10 Pakistan and Selected Peer Country Exports (% of GDP)

Figure 1.8 compares exports of goods and services as a percentage of GDP across Pakistan and selected peer countries. The graph shows that Pakistan's export performance has remained consistently lower than most comparator economies throughout the period. Pakistan's exports as a share of GDP have declined from relatively higher levels in the 1990s to around 8–10 percent in recent years, indicating weak export growth over time.

In contrast, countries such as Viet Nam, Indonesia, and China achieved significantly higher export shares, reflecting stronger integration into global trade. Viet Nam, in particular, experienced a substantial increase in exports as a percentage of GDP, far exceeding all other countries in comparison. India and Bangladesh have also shown comparatively better export performance than Pakistan in recent years.

Pakistan's relatively weak export performance may partly reflect its limited export diversification, both in terms of products and export destinations, as well as the concentration of exports in low-complexity products. The declining export share in GDP also suggests greater reliance on domestic consumption and weaker integration with external markets compared to peer economies. This situation constrains foreign exchange earnings and increases external sector vulnerabilities, making sustainable economic growth more difficult to achieve.

Figure 1.8 Pakistan and Selected Peer Country Exports (% of GDP)



Source: WDI

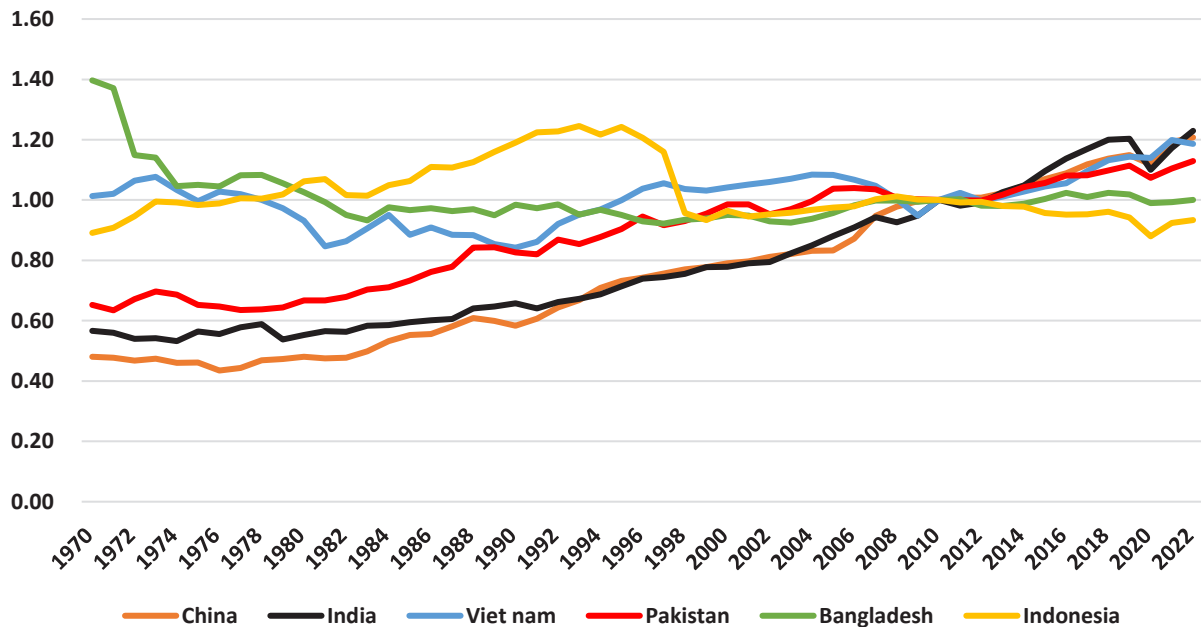
1.11 Productivity and Export Structure in Selected Asian Economies (1970–2022)

Figure 1.9 presents the long-term evolution of Total Factor Productivity (TFP) for Pakistan and selected Asian economies over the period 1970–2022. The graph shows that Pakistan's productivity follows a gradual upward trend, rising from relatively low levels in the early 1970s to higher levels in recent years. However, the overall improvement remains modest, indicating slow and limited productivity gains over time.

In contrast, China, India, and Viet Nam exhibit strong and sustained upward trajectories, particularly from the 1990s onwards, reflecting rapid efficiency improvements and a deeper structural transformation. Indonesia shows moderate gains with periods of stagnation, while Bangladesh gradually stabilizes after earlier fluctuations.

Overall, the figure highlights clear cross-country differences in productivity performance. Pakistan's comparatively weaker productivity growth points to limited efficiency gains and slower structural upgrading relative to peer economies. This pattern is consistent with earlier evidence of export concentration and low export complexity, and it may help contextualize differences in export performance and export intensity observed across countries.

Figure 1.9 Productivity and Export Structure in Selected Asian Economies (1970–2022)



Source: APO

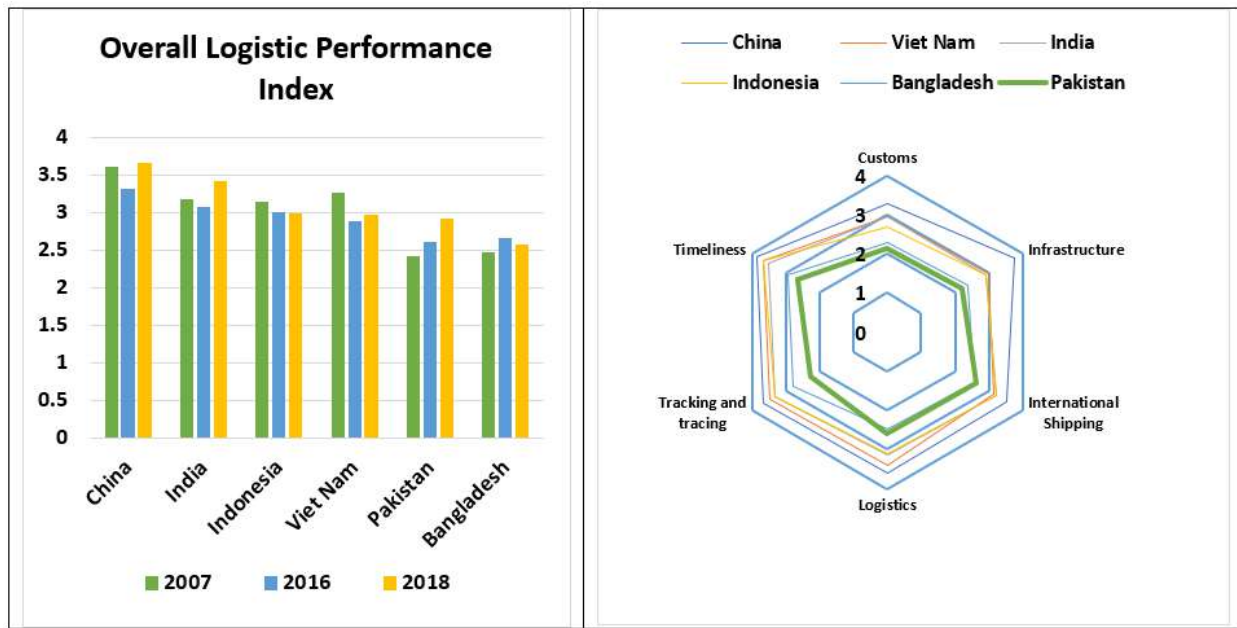
1.12 Logistics Performance Index (LPI): Pakistan and Selected Peer Economies

Figure 1.10 presents the Logistics Performance Index (LPI) comparison for Pakistan and selected peer economies across key dimensions, including customs efficiency, infrastructure quality, international shipping, logistics competence, tracking and tracing, and timeliness.

The bar chart shows that China consistently records the highest overall logistics performance, followed by India and Viet Nam, while Indonesia and Bangladesh fall in the middle range. Pakistan remains relatively lower than most peers, particularly in overall logistics efficiency. The radar chart further confirms that Pakistan scores lower across most logistics dimensions, with comparatively weaker performance in infrastructure, customs efficiency, and tracking systems.

Overall, the figure indicates a clear gap in logistics performance between Pakistan and higher-performing regional economies. This suggests relatively weaker trade facilitation and logistics efficiency, which are important factors influencing trade competitiveness and export performance.

Figure 1.10 Logistics Performance Index: Pakistan and Selected Peer Economies



Source: WDI

PAKISTAN'S EXPORTS DISTRIBUTION OVERVIEW



Chapter 2

PAKISTAN'S EXPORTS DISTRIBUTION OVERVIEW

This chapter maps the structure of Pakistan's exports across sectors, products, and markets using stacked area analysis over the 2014–2024 period, with discussion anchored in the latest (2024) composition. It traces shifts in sectoral shares, examines product-level concentration within major export sectors, and assesses the distribution of exports across key markets, including product composition within both sectors and destination markets.

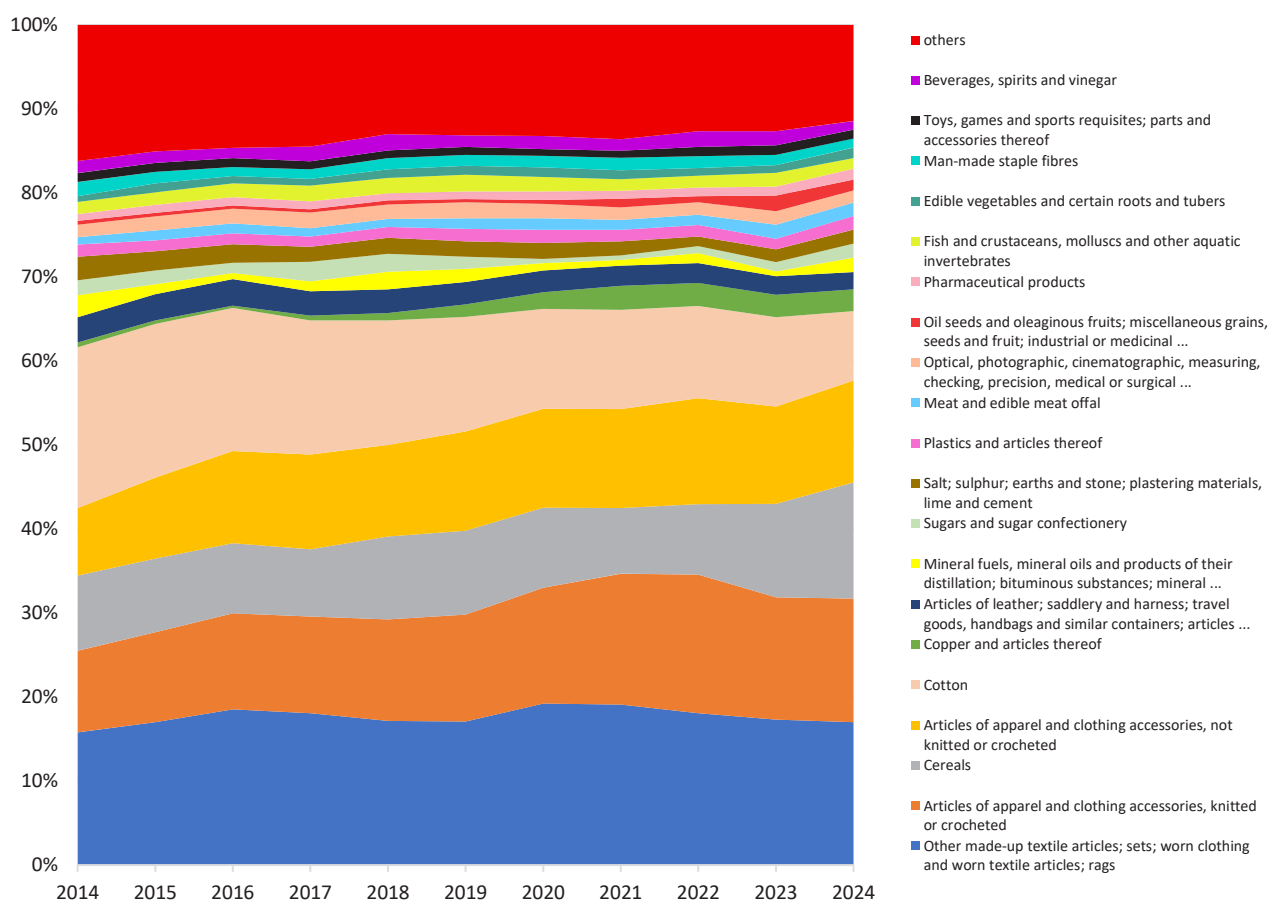
The analysis focuses on the risks inherent in a concentrated export structure. Heavy reliance on a limited set of sectors, products, and markets increases exposure to shocks such as shifts in global demand, changing consumer preferences, price volatility, supply chain disruptions, and natural events (e.g., floods, pandemics or droughts). Such concentration heightens the risk of export instability and potential revenue losses, underscoring the vulnerability of Pakistan's external sector.

2.1 Distribution of Pakistan's Exports Across Sectors

Figure 2.1 illustrates the distribution of Pakistan's exports at the HS-2-digit level, showing how total exports are composed across major sectors and how this composition has evolved over time.

In 2024, total exports reached USD 32.5 billion, with a high degree of concentration in a limited number of sectors. The largest categories include other made-up textile articles; sets; worn clothing and worn textile articles; rags (USD 5.5 billion), knitted apparel (USD 4.8 billion), cereals (USD 4.5 billion), non-knitted apparel (USD 3.9 billion), and cotton (USD 2.7 billion). Collectively, these five sectors account for about 66% of total exports, indicating a concentrated export structure, while the remaining share is distributed across a wide range of smaller sectors.

Figure 2.1 Distribution of Pakistan's Exports Across Sectors



Source: ITC

2.2 Distribution of Sectoral Exports Across Products

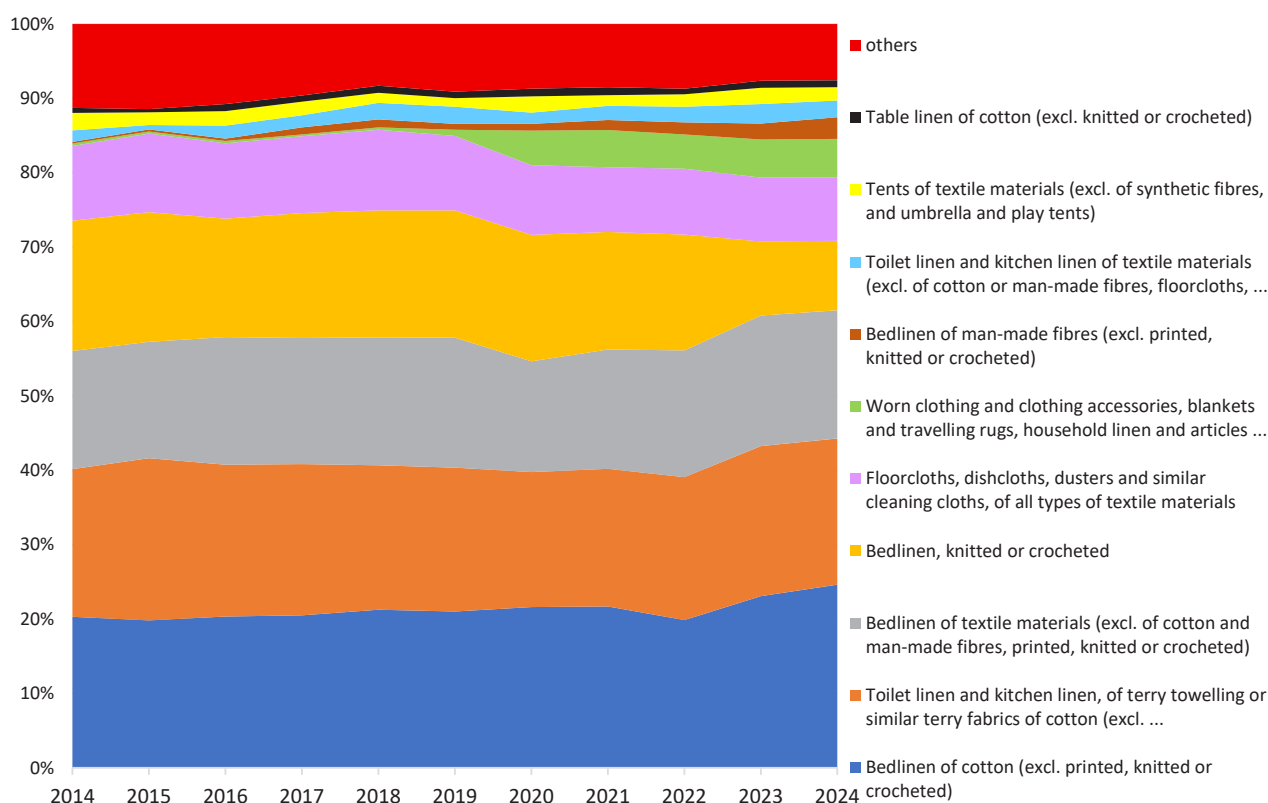
This section examines the internal structure of Pakistan's major export sectors by analyzing their product-level composition. It focuses on how exports within leading sectors are distributed across different products, highlighting the extent of concentration and diversification within each sector. The analysis is presented for the top five export sectors identified in the previous section.

2.2.1 Distribution of Pakistan's Exports of Other Made-Up Textile Articles and Clothing (HS 63)

Figure 2.2 presents the distribution of Pakistan's exports of other made-up textile articles and related clothing items at the HS-6 level, highlighting the product composition within this sector and its evolution over time.

Exports in this category are highly concentrated in a few key product segments. The dominant items include bedlinen of cotton (excluding printed, knitted or crocheted) (USD 1.36 billion), toilet and kitchen linen of terry towelling or similar cotton fabrics (USD 1.09 billion), bedlinen of textile materials (excluding cotton and man-made fibres) (USD 0.95 billion), bedlinen, knitted or crocheted (USD 0.52 billion), and floorcloths, dishcloths, dusters and similar cleaning cloths (USD 0.47 billion).

Together, these five product groups account for approximately USD 4.38 billion, representing around 75–80% of total exports within the sector. This reflects a strong concentration in a narrow set of products, while the remaining share is distributed across smaller and more fragmented product categories.

Figure 2.2 Distribution of Pakistan's Exports of Other Made-Up Textile and Clothing Articles (63)


Source: ITC

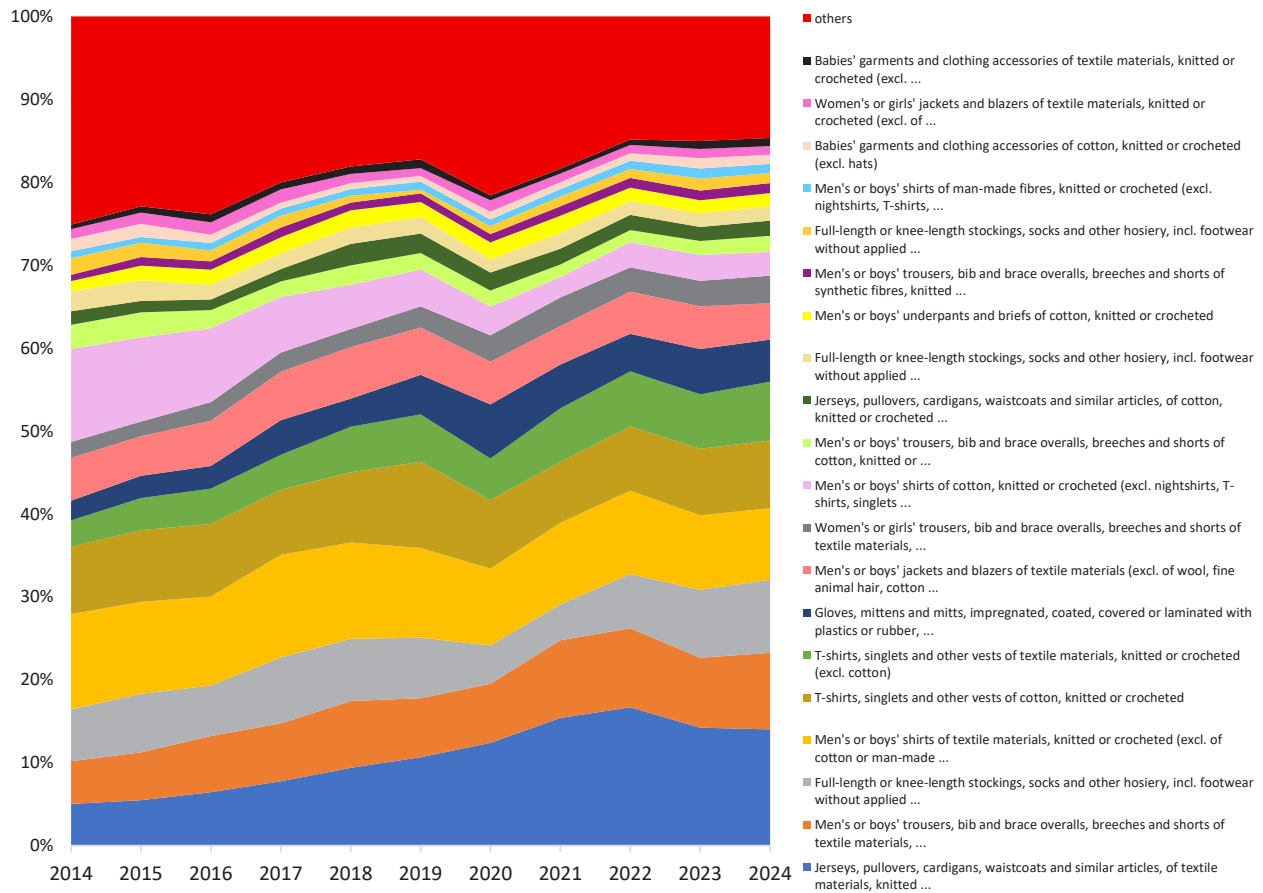
2.2.2 Distribution of Pakistan's Exports of Knitted or Crocheted Apparel and Clothing Accessories (HS 61)

Figure 2.3 presents the distribution of Pakistan's exports of articles of apparel and clothing accessories, knitted or crocheted at the HS-6 level, highlighting the product composition within this sector and its evolution over time.

Exports in this category are relatively diversified; however, a few product groups account for a substantial share of total exports. The leading items include jerseys, pullovers, cardigans, waistcoats and similar articles (USD 0.67 billion), men's or boys' trousers, bib and brace overalls, breeches and shorts (USD 0.44 billion), stockings, socks and other hosiery (USD 0.42 billion), men's or boys' shirts (USD 0.41 billion), and T-shirts, singlets and other vests of cotton (USD 0.39 billion). Other notable products include T-shirts of other textile materials (USD 0.34 billion), gloves and mittens (USD 0.24 billion), and men's or boys' jackets and blazers (USD 0.21 billion).

Collectively, these eight product groups account for approximately USD 3.12 billion, representing around 50% of total exports within the sector. This reflects a moderate level of concentration, while the remaining share is distributed across a wider range of apparel products and a residual "Others" category.

Figure 2.3 Distribution of Pakistan's Exports of Knitted or Crocheted Apparel and Clothing Accessories (HS 61)



Source: ITC

2.2.3 Distribution of Pakistan's Exports of Non-Knitted Apparel and Clothing Accessories (HS 62)

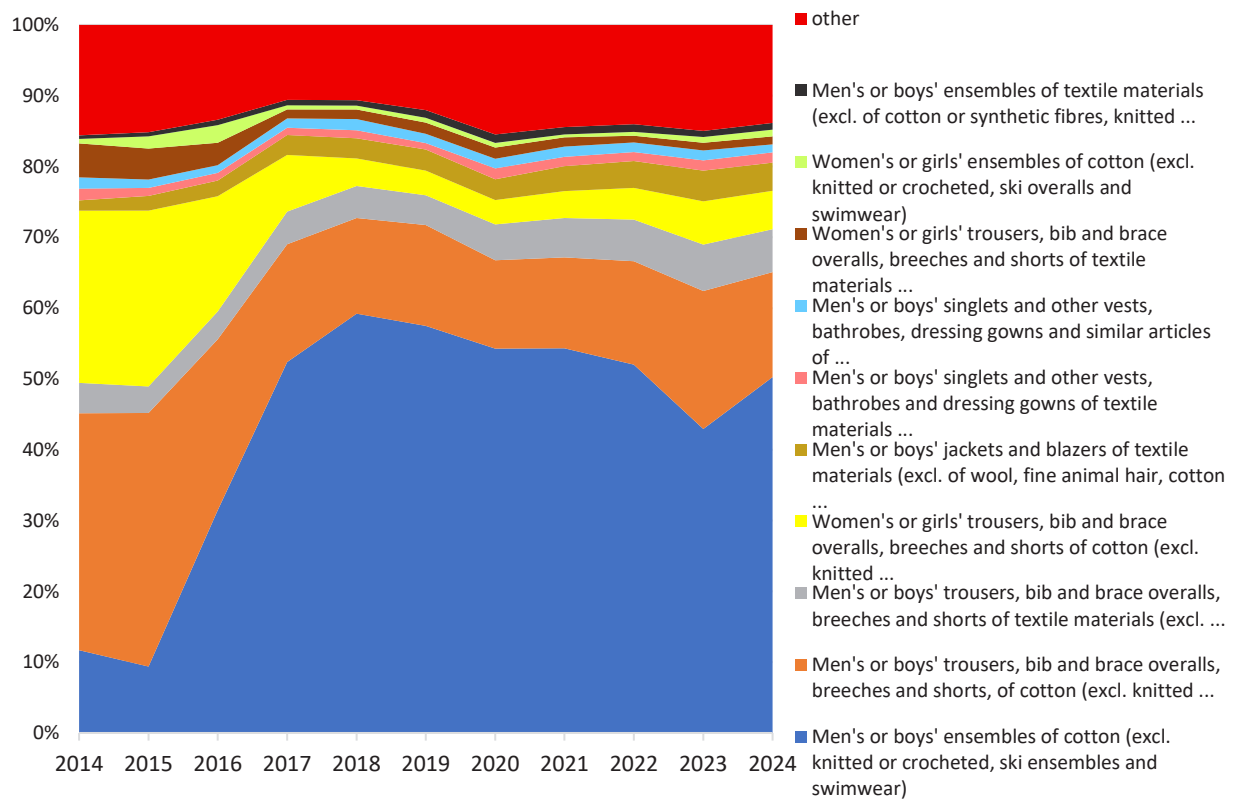
Figure 2.4 presents the distribution of Pakistan's exports of articles of apparel and clothing accessories, not knitted or crocheted at the HS-6 level, highlighting the product composition within this sector and the evolution of shares over time.

The structure of exports in this category is highly concentrated in a single product segment. Men's or boys' ensembles of cotton (excluding knitted or crocheted) emerge as the dominant export, with their share rising sharply from a relatively low base in 2014–2015 to over 50% in recent years, making it the principal driver of exports within this category.

Other notable product groups include men's or boys' trousers and shorts of cotton, women's or girls' trousers and shorts, and men's or boys' ensembles of textile materials (excluding cotton). These categories maintain moderate but relatively stable shares over the period.

Overall, the figure indicates a strongly skewed export structure, with growing dependence on a single dominant product, while the remaining exports are distributed across smaller categories and a residual "Others" group.

Figure 2.4 Distribution of Pakistan's Exports of Non-Knitted Apparel and Clothing Accessories (HS 62)



Source: ITC

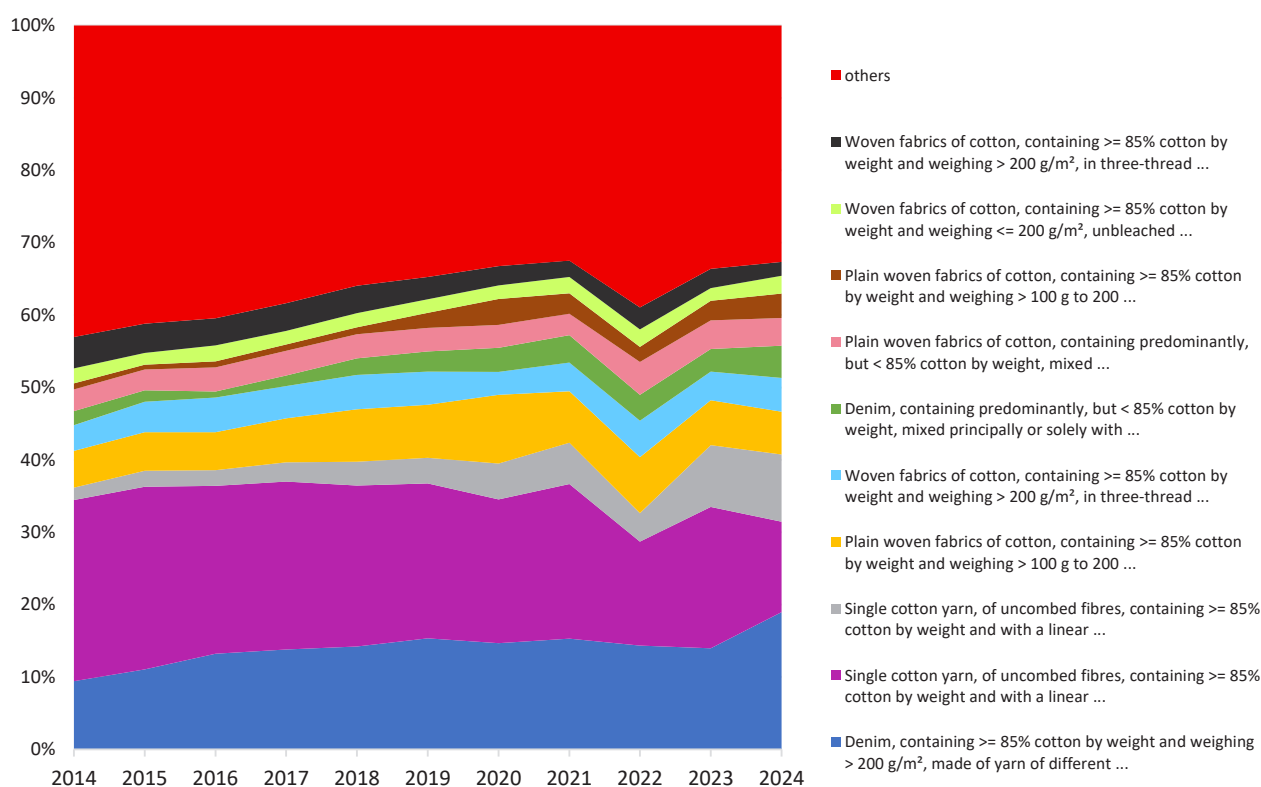
2.2.4 Distribution of Pakistan's Cotton Exports (HS 52)

Figure 2.5 presents the distribution of Pakistan's cotton exports at the HS-6 level, highlighting the product composition within cotton-based exports and their evolution over time.

Cotton exports are moderately concentrated in a limited number of product categories. The leading products include denim, containing $\geq 85\%$ cotton by weight and weighing $>200 \text{ g/m}^2$, made of yarn of different colors (USD 0.51 billion), single cotton yarn, of uncombed fibres, containing $\geq 85\%$ cotton by weight (USD 0.34 billion and USD 0.25 billion across two categories), and plain woven fabrics of cotton, containing $\geq 85\%$ cotton by weight and weighing $100\text{--}200 \text{ g/m}^2$ (USD 0.16 billion).

Collectively, these four product groups account for approximately USD 1.26 billion, representing around 46–47% of total cotton exports. This indicates a moderately concentrated export structure, while the remaining share is distributed across a wider range of cotton-based products and a residual "Others" category.

Figure 2.5 Distribution of Pakistan's Cotton Exports (HS 52)



Source: ITC

2.2.5 Distribution of Pakistan's Cereal Exports (HS 10)

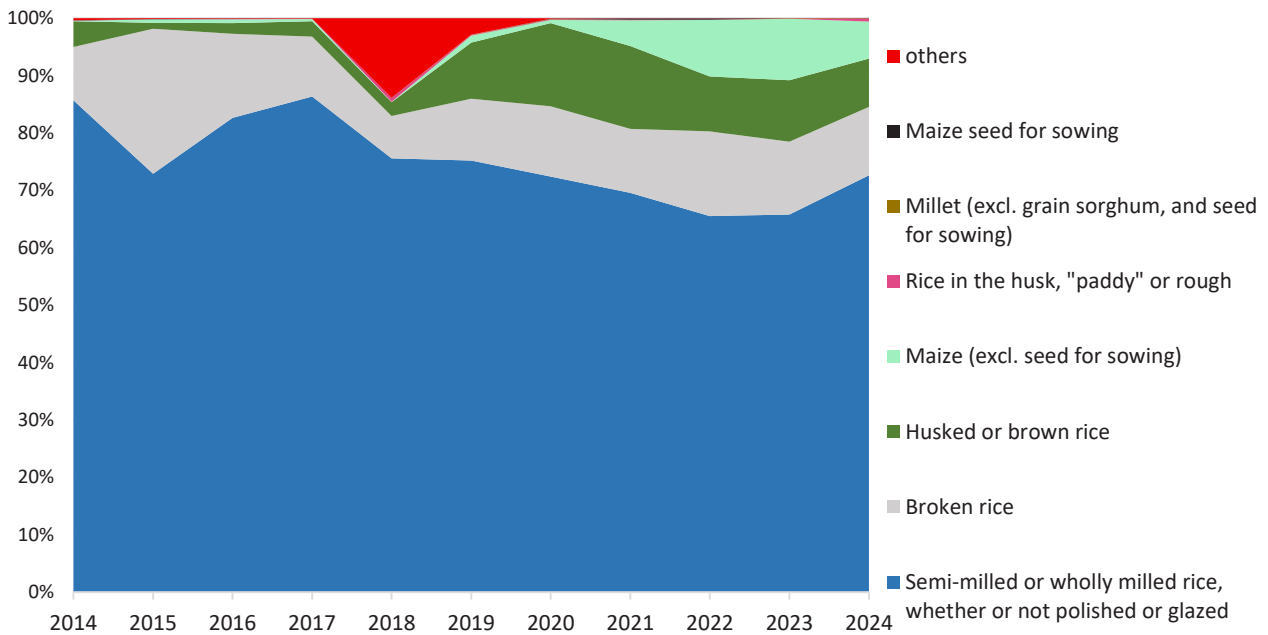
Figure 2.6 presents the distribution of Pakistan's cereal exports at the HS-6 level, highlighting the product composition within cereals and its evolution over time.

The structure of cereal exports is highly concentrated, dominated by semi-milled or wholly milled rice, which consistently accounts for the largest share. Its contribution remained above 65–70% throughout the period, although it has shown a gradual decline in recent years as other products gain some share.

Other notable products include broken rice and rice in the husk (paddy or rough), which maintain moderate and relatively stable shares over time. In the post-2020 period, husked or brown rice and maize (excluding seed for sowing) have also increased their presence, contributing to a modest diversification within the cereal basket.

Overall, despite the emergence of a few additional products, Pakistan's cereal exports remain heavily dependent on rice-based categories, with a pronounced concentration in a single dominant product group and limited diversification across other cereals.

Figure 2.6 Distribution of Pakistan's Cereal Exports (HS 10)



Source: ITC

2.3 Distribution of Pakistan's Exports Across Global Markets

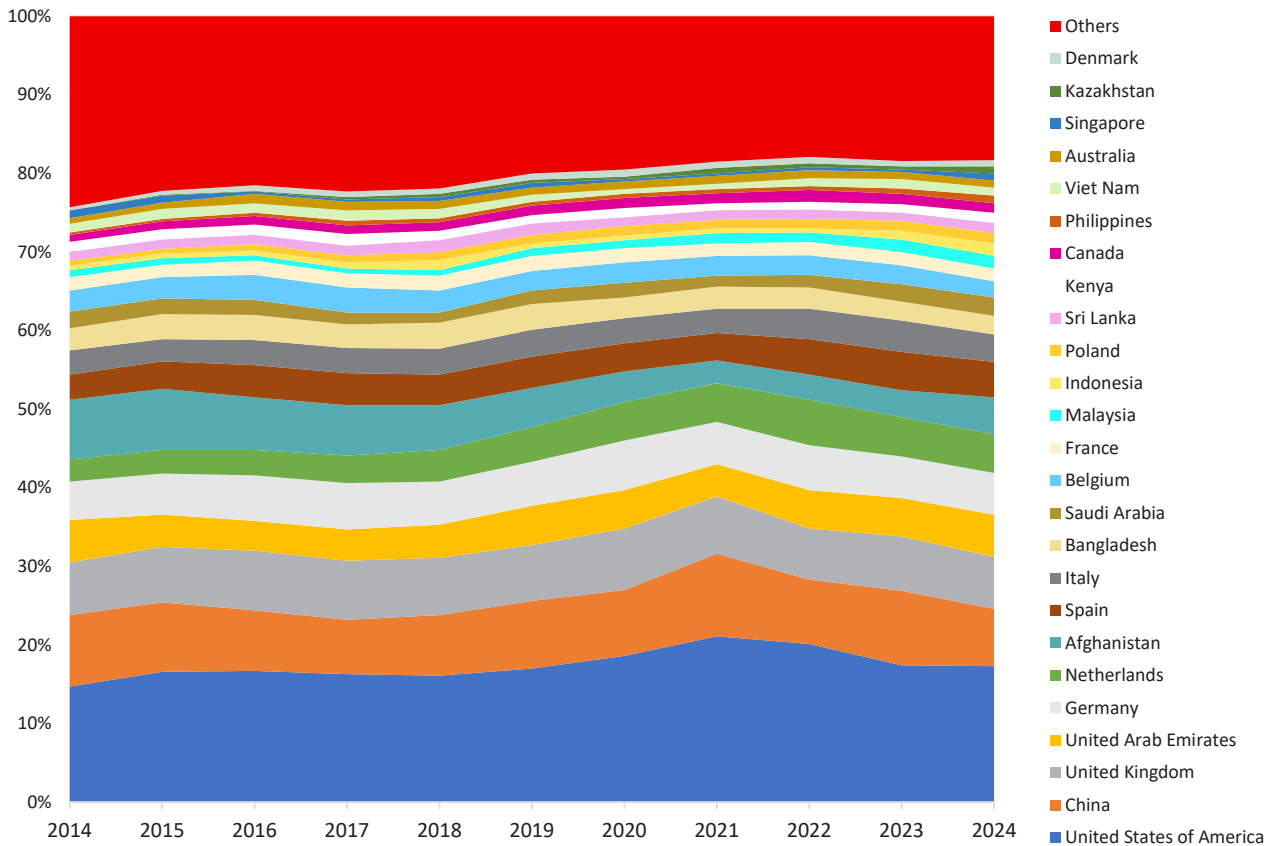
Figure 2.7 presents the distribution of Pakistan's exports across partner countries, highlighting the geographical composition of exports and its evolution over time.

In 2024, total exports stood at USD 32.5 billion, with a moderate degree of concentration in a limited number of destinations. The United States of America (USD 5.6 billion) accounting for around 17% of total exports, followed by China (USD 2.4 billion, about 7%), the United Kingdom (USD 2.1 billion, about 7%), the United Arab Emirates (USD 1.8 billion, about 5%), and Germany (USD 1.7 billion, about 5%).

Collectively, these five markets account for approximately 40–42% of total exports, indicating a moderate level of geographical concentration. Other destinations such as the Netherlands, Afghanistan, Spain, and Italy contribute smaller but stable shares, while the remaining exports are distributed across a wide range of countries grouped under "Others".

Overall, the figure shows a diversified export market structure, though with continued reliance on a limited set of key trading partners.

Figure 2.7 Distribution of Pakistan's Exports Across Global Markets



Source: ITC

2.3.1 Distribution of Pakistan's Exports to the United States

Figure 2.8 presents the distribution of Pakistan's exports to the United States at the HS-6 level, highlighting product composition and its evolution over time.

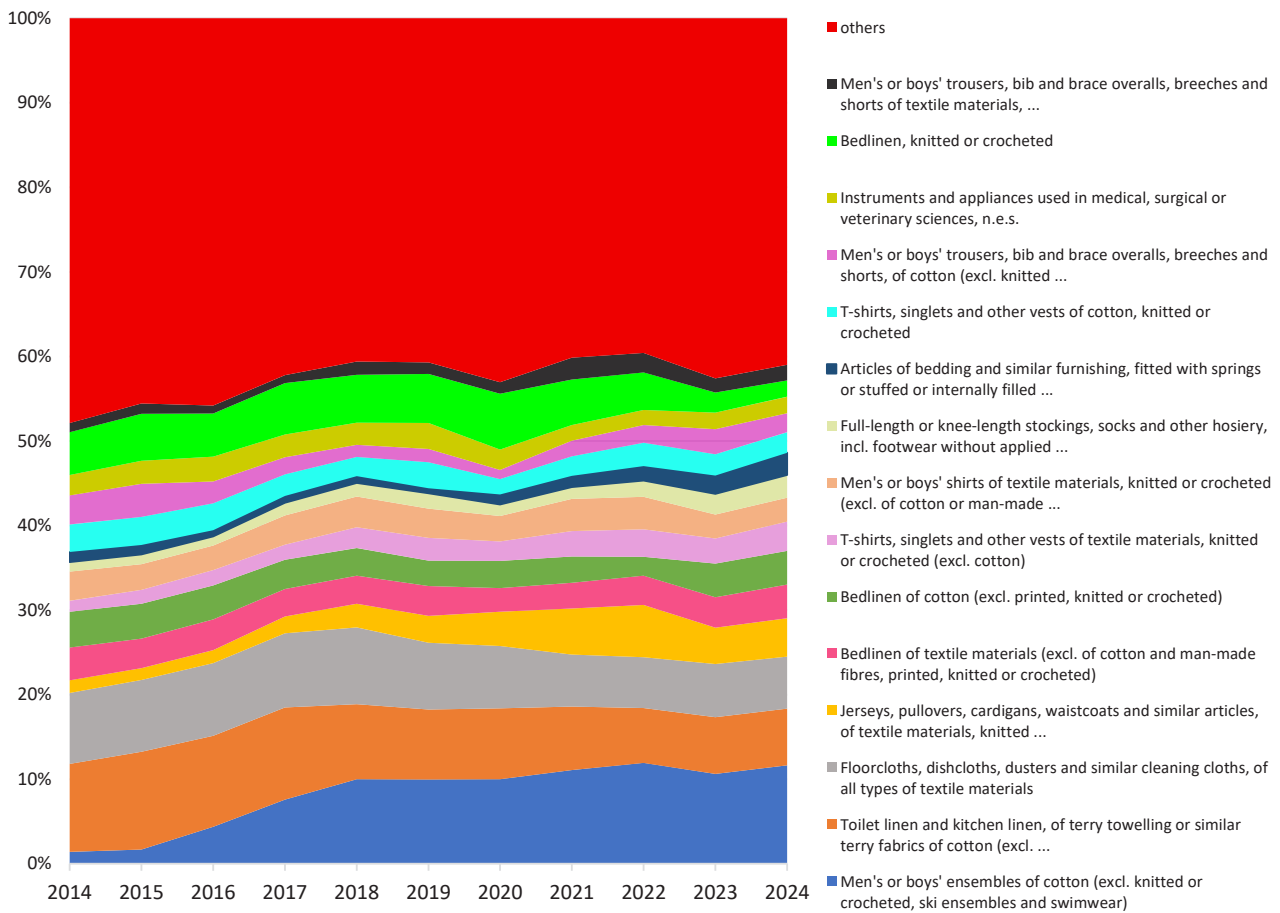
In 2024, exports to the United States amounted to approximately USD 5.6 billion, with a clear concentration in textile and apparel products. The largest item is men's or boys' ensembles of cotton (excluding knitted or crocheted), valued at USD 0.65 billion, accounting for 11.6% of total exports to this market.

Other major exports include cotton terry linen for kitchen and toilet use, floorcloths and cleaning textiles, knitted jerseys and pullovers, bedlinen (cotton and other textile materials), T-shirts and vests, and men's shirts, each contributing between 2.8% and 6.7%.

Together, the top eight products account for about USD 2.94 billion, or 52–53% of total exports to the United States, indicating a moderate level of product concentration. The remaining exports are distributed across a wide range of textile and non-textile products.

Overall, exports to the United States are strongly centered in apparel and home textile categories, with a relatively broad supporting base across related products.

Figure 2.8 Distribution of Pakistan's Exports to the United States



Source: ITC

2.3.2 Distribution of Pakistan's Exports to China

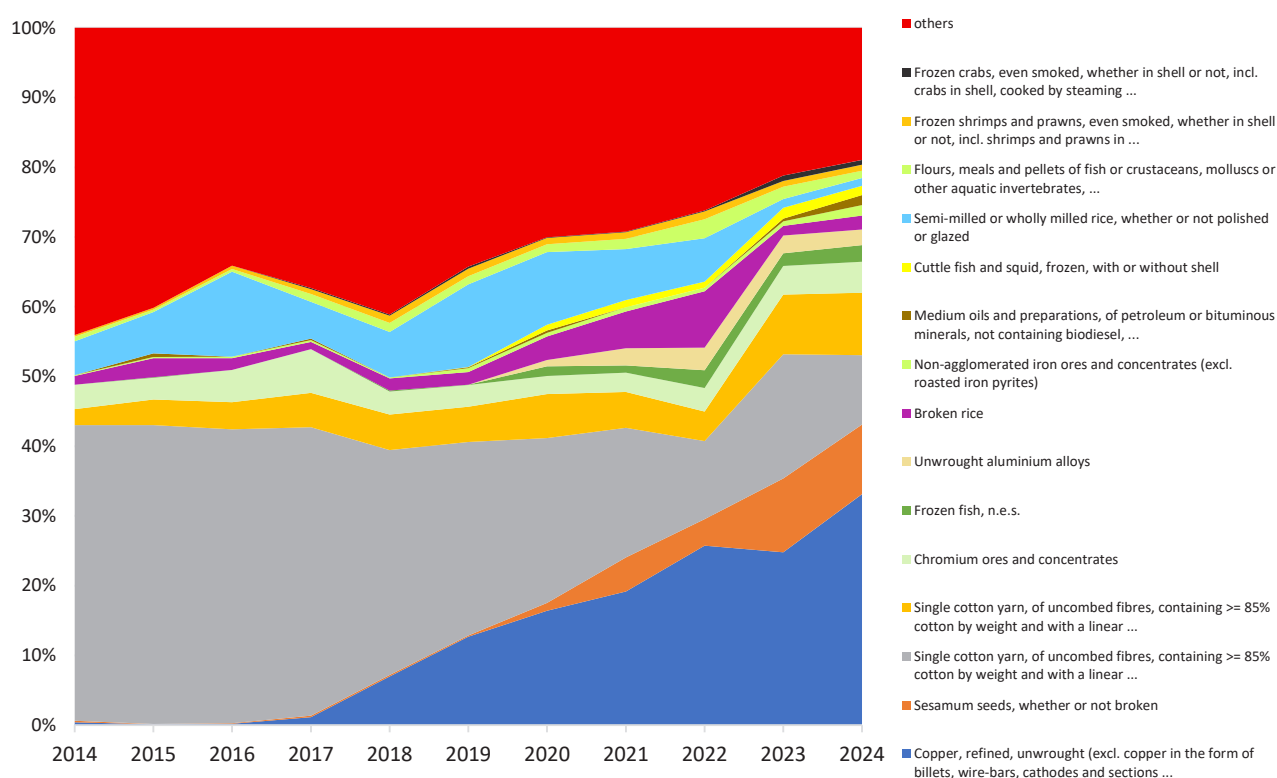
Figure 2.9 presents the distribution of Pakistan's exports to China at the HS-6 level, highlighting the product composition and its evolution over time.

In 2024, exports to China stood at approximately USD 2.38 billion, with a highly concentrated structure dominated by a few primary commodities. The leading export is refined copper (unwrought), valued at USD 0.79 billion, accounting for about 33.1% of total exports, indicating strong dependence on a single product.

Other notable exports include sesame seeds (USD 0.24 billion, 10.0%), single cotton yarn (around 19% combined contribution, though declining over time), chromium ores and concentrates (USD 0.11 billion, 4.4%), and frozen fish (USD 0.06 billion, 2.4%). The remaining exports are spread across a range of low-volume products.

Collectively, the top export items account for around 65–70% of total exports to China, reflecting a high degree of concentration, with copper acting as the dominant export driver. The residual share is distributed across a wide set of minor products, indicating limited diversification in the export basket to this market.

Figure 2.9 Distribution of Pakistan's Exports to China



Source: ITC

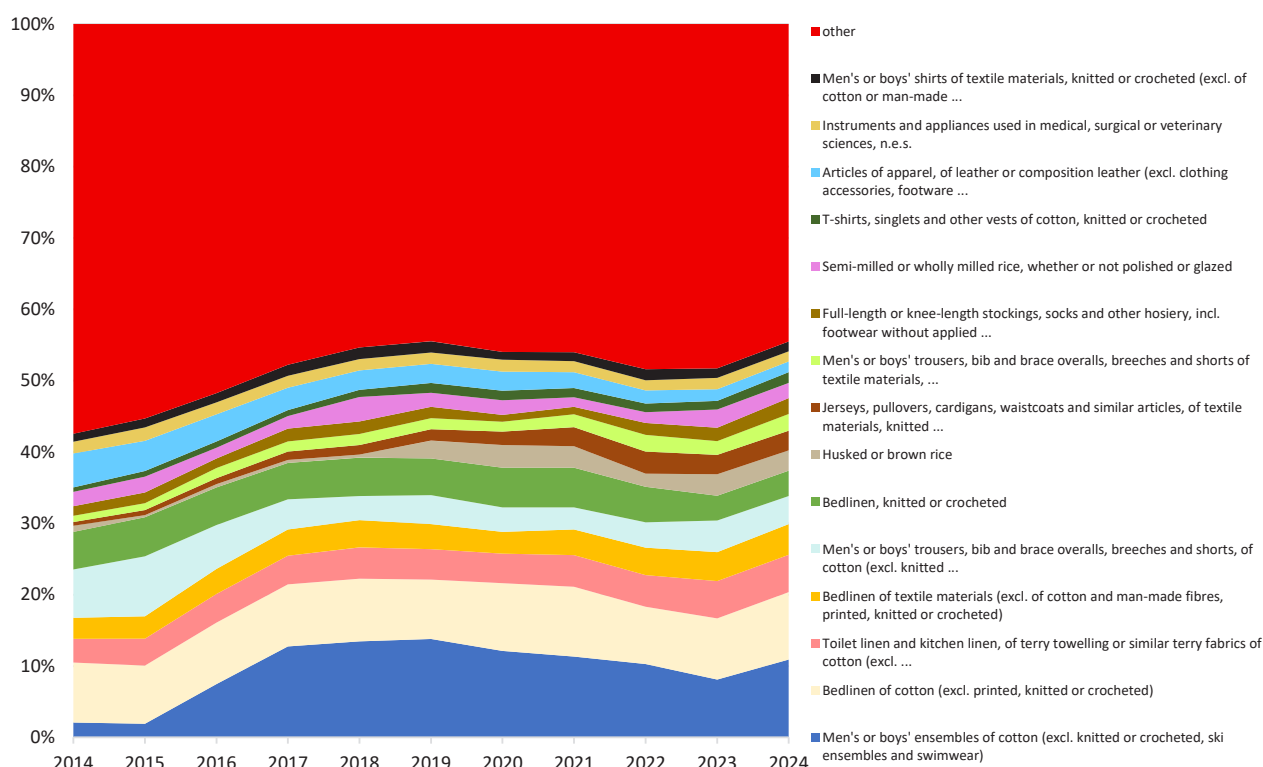
2.3.3 Distribution of Pakistan's Exports to the European Union³

In 2024, Pakistan's exports to the EU-27 amounted to USD 8.95 billion, with a clear concentration in textile and apparel products. The leading export item is men's cotton ensembles, valued at USD 974.9 million (10.9%), followed by cotton bedlinen at USD 846.6 million (9.5%).

Other major exports include terry towels (USD 468.4 million, 5.2%), bedlinen of other textiles (USD 384.3 million, 4.3%), and men's cotton trousers (USD 352.5 million, 3.9%). Among non-textile products, rice accounts for about USD 442 million (around 5%), while medical instruments (1.4%) and leather apparel (1.5%) contribute smaller shares.

Collectively, the top product categories account for around 55–60% of total exports to the European Union, indicating a moderate to high level of concentration. The export basket remains largely centered on textile and apparel products, with a limited presence of non-textile exports.

³ Note: The EU is treated as a single market for concentration, potential, and diversification analysis. However, due to the unavailability of unit value data for the EU as a single market, member states are considered individually for competitiveness analysis.

Figure 2.10 Distribution of Pakistan's Exports to the European Union


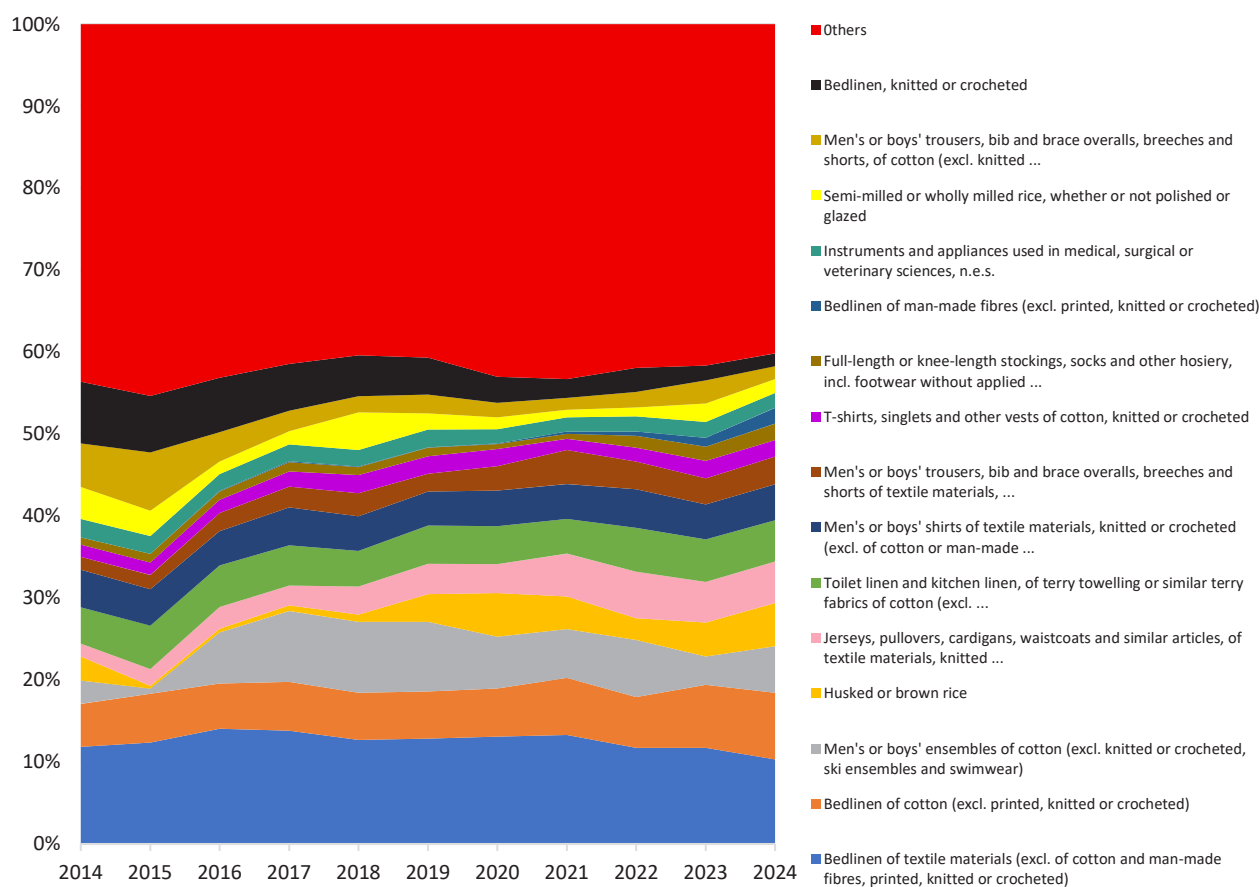
2.3.4 Distribution of Pakistan's Exports to the United Kingdom

In 2024, Pakistan's exports to the United Kingdom amounted to approximately USD 2.15 billion, with a moderately diversified structure but a clear concentration in textiles and apparel products. The leading export item was bedlinen of textile materials (excluding cotton and man-made fibres), valued at USD 0.22 billion, accounting for around 10.3% of total exports.

Other key exports include bedlinen of cotton (USD 0.17 billion, 8.1%), men's or boys' ensembles of cotton (USD 0.12 billion, 5.7%), husked or brown rice (USD 0.11 billion, 5.3%), jerseys and similar knitted garments (USD 0.11 billion, 5.1%), toilet and kitchen linen (USD 0.11 billion, 5.0%), and men's or boys' shirts (USD 0.094 billion, 4.4%).

Collectively, these major product categories account for around 45–47% of total exports to the United Kingdom, indicating a moderate level of product concentration. The remaining exports are distributed across a wide range of smaller textile and non-textile products.

Overall, exports to the United Kingdom are primarily textile-based, with a relatively distributed product structure and no strong dependence on a single dominant export item.

Figure 2.11 Distribution of Pakistan's Exports to the United Kingdom


Source: ITC

2.3.5 Distribution of Pakistan's Exports to the United Arab Emirates

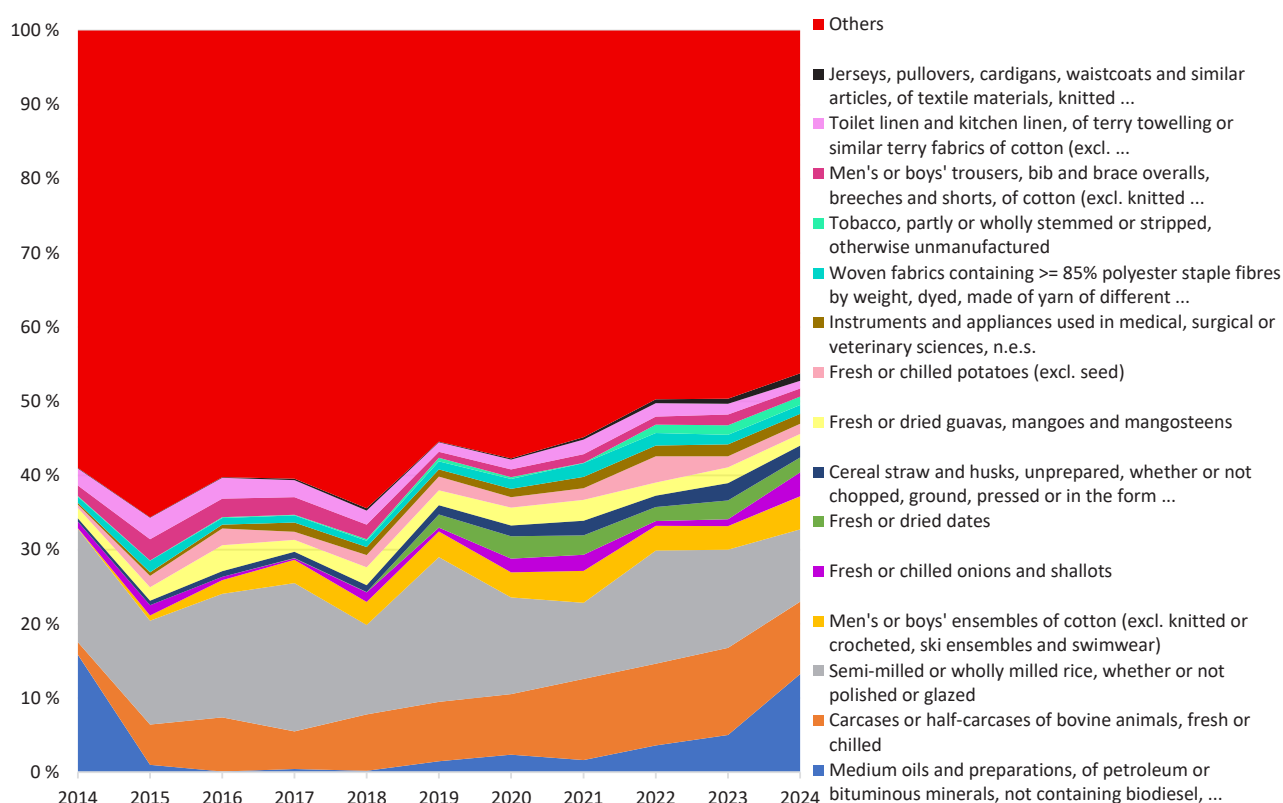
In 2024, Pakistan's exports to the United Arab Emirates amounted to USD 1.76 billion, with a moderately concentrated structure spanning energy, agricultural, and textile products. The leading export category is petroleum oils (medium oils), valued at USD 233 million (13.2%), followed by fresh bovine meat at USD 172 million (9.8%) and rice at USD 172 million (9.7%), reflecting strong demand for both energy-related and agro-based products.

Other notable exports include men's cotton ensembles (USD 78.8 million, 4.5%) and fresh onions and shallots (USD 57.2 million, 3.2%). Agricultural products also feature prominently, including dates (USD 35.3 million, 2.0%), cereal straw (USD 28.2 million, 1.6%), and mangoes (USD 27.9 million, 1.6%).

A range of mid-level products contributes to broader diversification, such as potatoes (USD 24.0 million, 1.36%), medical instruments (USD 23.8 million, 1.35%), polyester woven fabrics (USD 20.9 million, 1.19%), tobacco (USD 20.2 million, 1.14%), men's cotton trousers (USD 19.2 million, 1.09%), terry towels (USD 18.4 million, 1.04%), and knitted garments (USD 17.6 million, 1.0%).

Overall, exports to the UAE are moderately concentrated in a few leading energy and agro-based products, while a wide range of smaller categories provides partial diversification across textiles, agriculture, and light manufactures.

Figure 2.12 Distribution of Pakistan's Exports to the United Arab Emirates



Source: ITC

2.3.6 Distribution of Pakistan's Exports to Bangladesh

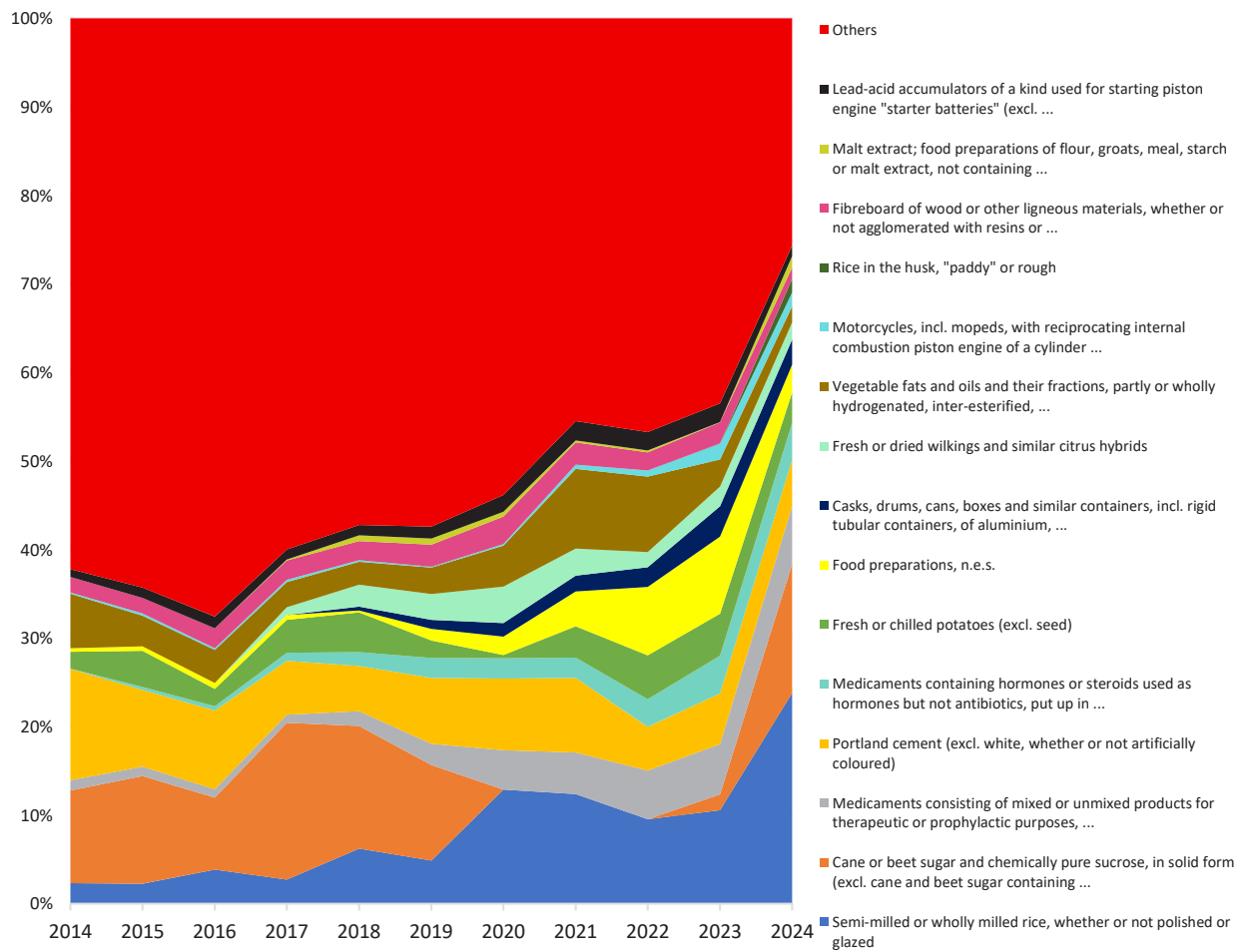
Figure 2.13 presents the distribution of Pakistan's exports to Bangladesh at the HS-6 level, showing a highly concentrated export structure dominated by textile intermediates. In 2024, total exports to Bangladesh stood at USD 779 million, with a strong reliance on a narrow set of products.

The leading export is denim fabric ($\geq 85\%$ cotton, $>200 \text{ g/m}^2$), valued at USD 295 million, accounting for 37.9% of total exports. Other key textile products include woven cotton fabrics ($\geq 85\%$ cotton, three-thread) at USD 68.7 million (8.8%) and denim with less than 85% cotton at USD 67.3 million (8.6%). Yarn products also feature prominently, including single cotton yarn with combined exports of around USD 40.1 million (5.2%) and USD 28.5 million (3.7%) across categories.

Non-textile exports are relatively limited but include cement clinkers (USD 48.5 million, 6.2%), disodium carbonate (USD 30.0 million, 3.9%), sugar (USD 11.9 million, 1.5%), and maize (USD 10.9 million, 1.4%). Several other cotton fabric categories contribute marginal shares of around 1–1.3% each, further reinforcing the dominance of textile-based exports.

Overall, exports to Bangladesh are highly concentrated in textile intermediates—particularly denim and cotton fabrics—reflecting strong integration with Bangladesh's garment manufacturing chain, with limited diversification beyond the textile sector.

Figure 2.14 Distribution of Pakistan's Exports to Afghanistan



Source: ITC

2.3.8 Distribution of Pakistan's Exports to Saudi Arabia

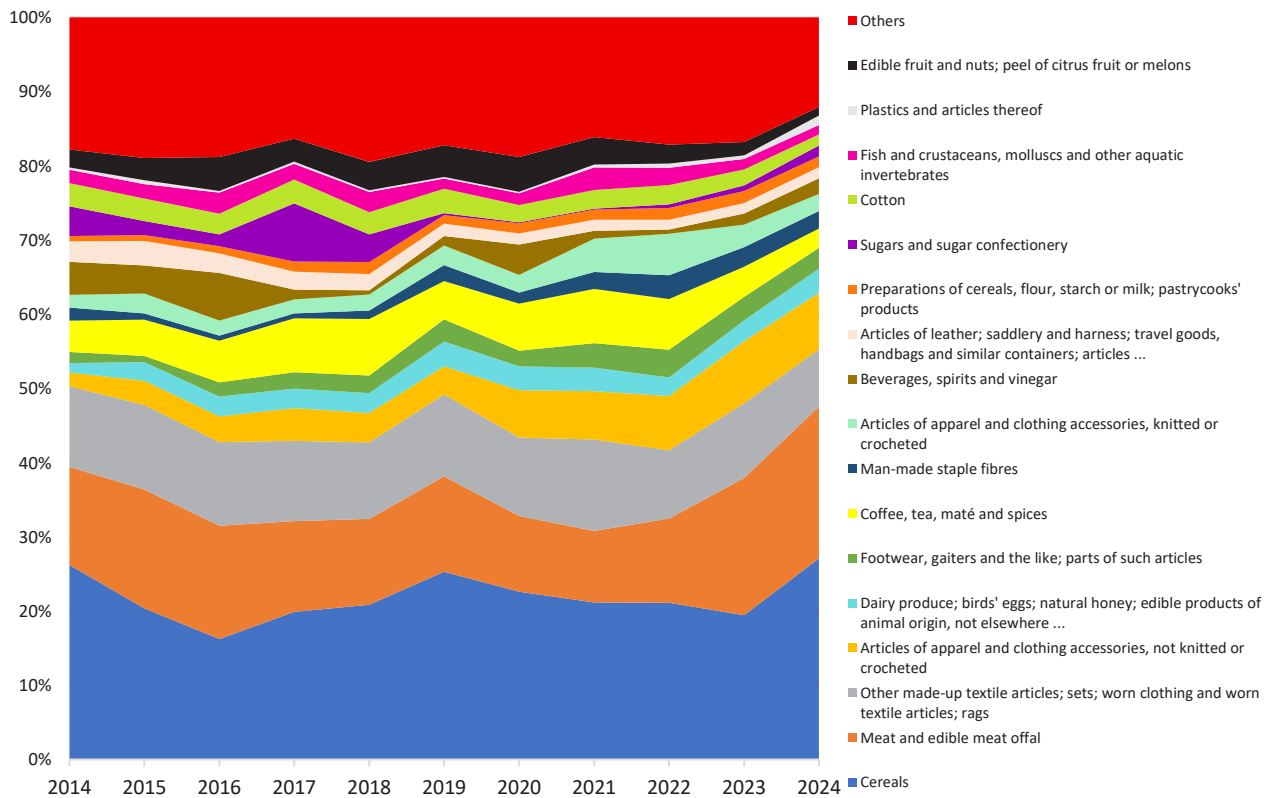
The figure 2.15 presents the distribution of Pakistan's exports to Saudi Arabia in 2024, where total exports amounted to USD 734.9 million. The export structure is highly concentrated, with a strong dominance of food-related products.

The leading export is cereals, valued at USD 199.1 million (27.1%), followed by meat and edible meat offal at USD 150.3 million (20.4%). Together, these two categories account for nearly half of total exports, indicating strong reliance on basic food commodities.

Other notable exports include made-up textile articles (USD 56.9 million, 7.7%) and non-knitted apparel (USD 55.7 million, 7.6%). Smaller contributions come from dairy products (3.3%), footwear (2.8%), and coffee, tea and spices (2.6%).

Collectively, the top product categories account for over 60% of total exports to Saudi Arabia, reflecting a high level of concentration with strong dependence on agri-food products alongside a limited textile presence.

Figure 2.15 Distribution of Pakistan's Exports to Saudi Arabia



Source: ITC

2.3.9 Distribution of Pakistan's Exports to Malaysia

The figure 2.16 presents the distribution of Pakistan's exports to Malaysia in 2024, where total exports amounted to USD 515.5 million. The export structure is highly concentrated, with a strong reliance on a small number of agricultural commodities.

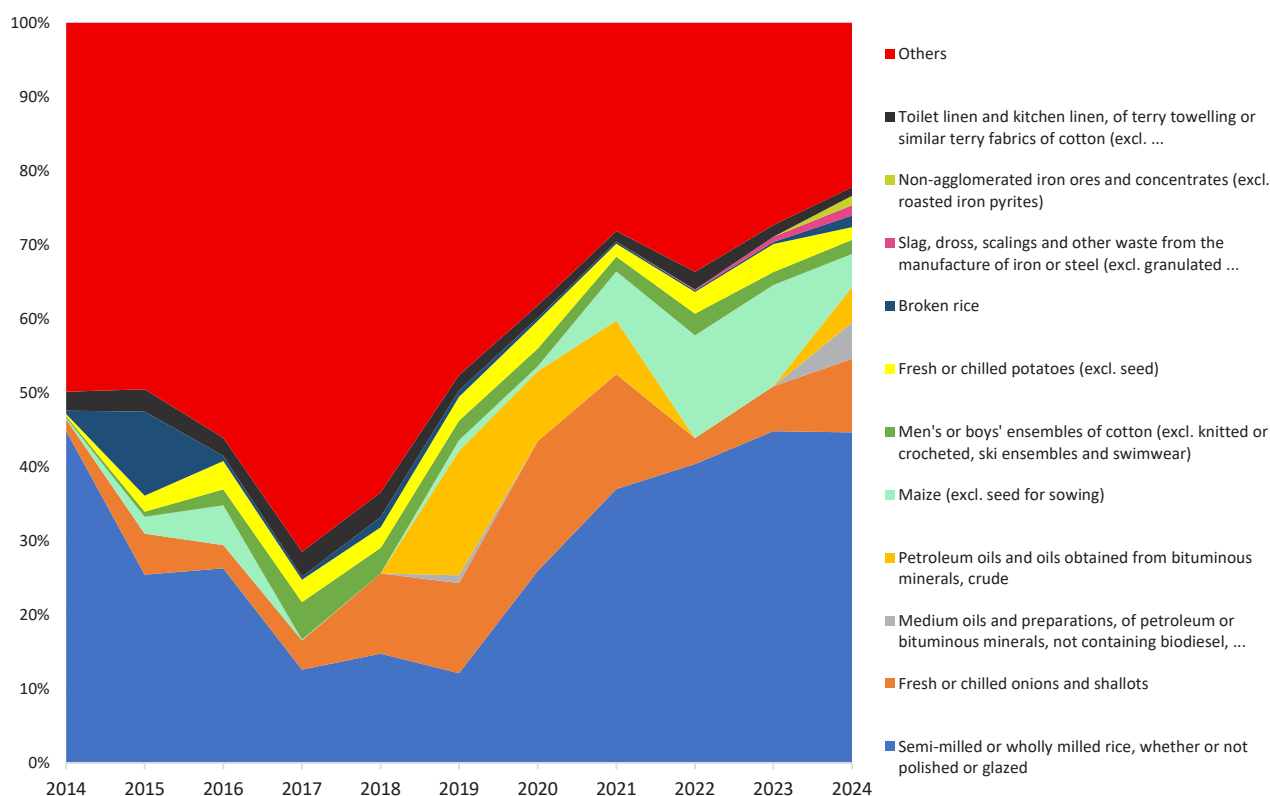
The leading export is semi-milled or wholly milled rice, valued at USD 230.2 million (44.7%), accounting for nearly half of total exports. It is followed by fresh or chilled onions and shallots at USD 51.3 million (9.9%), the second most significant export item.

Energy-related products also contribute to the export basket, including medium petroleum oils (USD 25.3 million, 4.9%) and crude petroleum oils (USD 24.7 million, 4.8%). Maize (USD 23.0 million, 4.5%) is another important agricultural export.

Smaller contributions include men's cotton ensembles (USD 9.8 million, 1.9%), fresh potatoes (USD 8.8 million, 1.7%), and broken rice (USD 8.1 million, 1.6%), along with minor shares from iron-related residues and textile products.

Overall, the top five products account for over 68% of total exports to Malaysia, indicating a highly concentrated export basket with strong dependence on rice and a limited range of agricultural and energy commodities.

Figure 2.16 Distribution of Pakistan's Exports to Malaysia



Source: ITC

2.3.10 Distribution of Pakistan's Exports to Indonesia

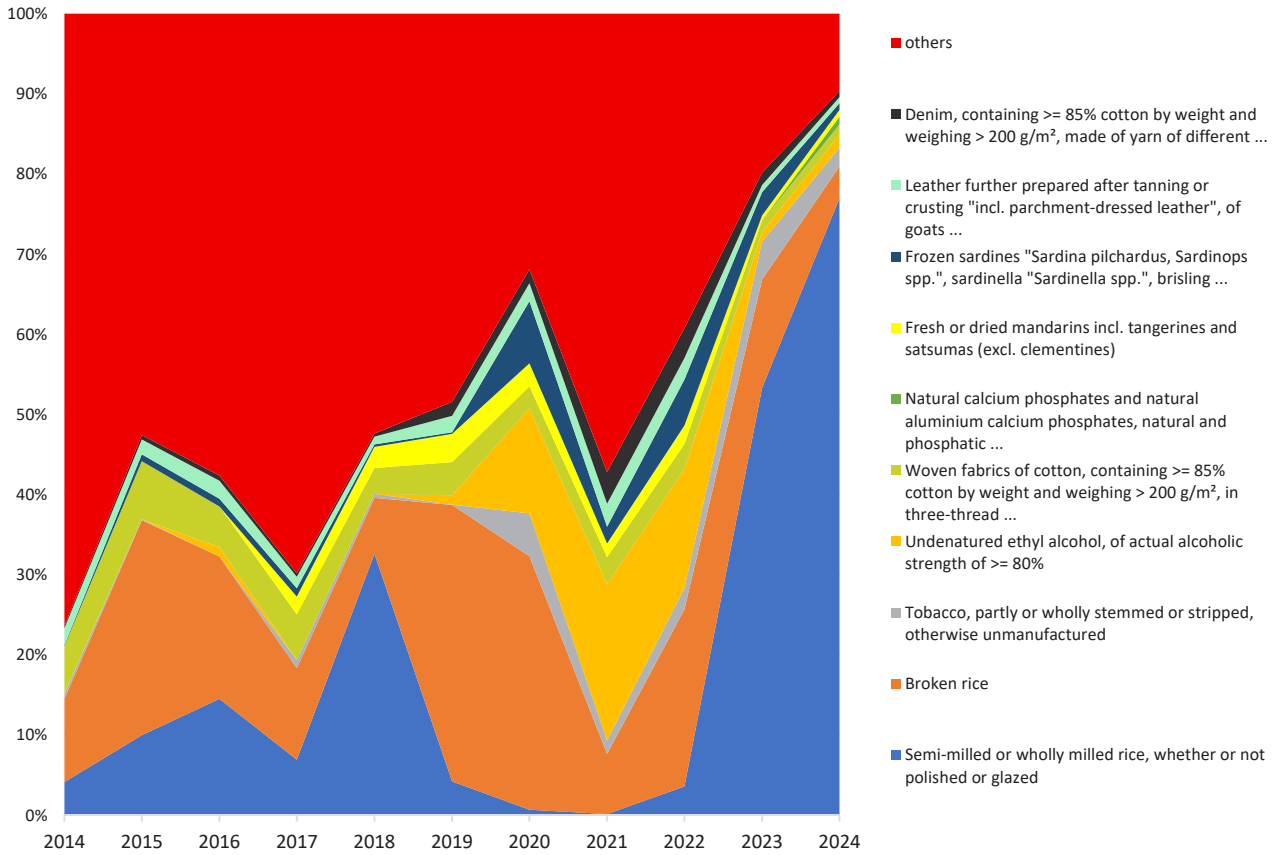
Figure 2.17 presents the distribution of Pakistan's exports to Indonesia in 2024, where total exports amounted to approximately USD 504 million. The export structure is extremely concentrated, with a dominant reliance on a single agricultural commodity.

The leading export is semi-milled or wholly milled rice, valued at USD 388.5 million (77.0%), accounting for more than three-quarters of total exports. It is followed by broken rice at USD 20.0 million (4.0%), which, while significantly smaller, further reinforces the dominance of rice-based exports.

Other products contribute marginally to the export basket, including tobacco (USD 11.7 million, 2.3%), undenatured ethyl alcohol (USD 8.3 million, 1.6%), and woven cotton fabrics (USD 6.4 million, 1.3%). Smaller shares are observed in natural phosphates (USD 4.9 million, 1.0%), mandarins (USD 4.4 million, 0.9%), frozen fish (USD 4.1 million, 0.8%), leather products (USD 3.8 million, 0.8%), and denim (USD 3.8 million, 0.8%), along with an "Others" category accounting for 9.6%.

Overall, the top five products account for over 86% of total exports to Indonesia, indicating an extremely concentrated export basket with overwhelming dependence on rice and very limited diversification across other sectors.

Figure 2.17 Distribution of Pakistan's Exports to Indonesia



Source: ITC

EXPORT DIVERSIFICATION AND VULNERABILITY ANALYSIS



Chapter 3

EXPORT DIVERSIFICATION AND VULNERABILITY ANALYSIS

Building on the observed concentration patterns in Chapter 1, Pakistan's export structure exhibits a high degree of concentration across sectors, products, and markets. However, export concentration is not inherently problematic when it reflects alignment with global demand structures. In such cases, specialization may indicate competitiveness and structural relevance rather than vulnerability. Accordingly, a more meaningful assessment of export performance requires examining the extent to which Pakistan's exports are aligned with international import demand patterns.

This chapter adopts a demand-structure perspective consistent with UNIDO's diversification framework (commonly referred to in applied trade analysis as Tool 4), which emphasizes the joint assessment of product and market dimensions to evaluate structural exposure and resilience. In line with this approach, the analysis introduces two complementary indicators: the Product Diversification Index (PDI) and the Export Market Diversification Index (EMDI).

The PDI assesses the extent to which Pakistan's export composition within a sector corresponds to the structure of global imports. It captures the degree of similarity between Pakistan's export product shares and world import demand patterns. Higher values indicate stronger alignment with global demand and a more diversified and less structurally concentrated export base, while lower values reflect concentration in products that are weakly aligned with global import demand.

The EMDI evaluates the alignment between Pakistan's exports to a specific partner country and that country's overall import structure. It reflects the extent to which Pakistan's export composition corresponds to destination-market demand conditions. Higher values indicate stronger market integration and better alignment with import structures, while lower values indicate weak alignment with market demand and reliance on export structures that are not closely consistent with the partner's import composition.

Following this logic, PDI and EMDI are jointly used to construct a vulnerability matrix that integrates both product and market dimensions of diversification. This framework classifies sectors into four groups: (i) strong alignment in both dimensions (low vulnerability), (ii) weak alignment in both dimensions (high vulnerability), and two intermediate cases where alignment differs across product and market structures. This structure allows a more nuanced identification of structural strengths and weaknesses in Pakistan's export profile across sectors and key destination markets.

This classification provides clear policy relevance. Sectors with weak alignment highlight areas where Pakistan's exports either diverge from global demand patterns or are directed toward markets with limited compatibility in terms of import structure. In such cases, policy attention may focus on improving product composition, identifying more suitable export destinations, or addressing both dimensions jointly. Conversely, sectors with strong alignment indicate existing competitiveness, where policy emphasis may shift toward scaling production, improving efficiency, and enhancing value addition within established export strengths rather than pursuing diversification alone.

Overall, this chapter moves beyond conventional diversification measures and adopts a demand-structure perspective grounded in UNIDO-consistent analytical logic. It identifies where Pakistan's exports are well aligned with global and market demand structures, where structural mismatches persist across products and destinations, and where targeted adjustments can reduce vulnerability while strengthening export competitiveness across Pakistan's major export markets.

3.1 Comparative Overview of Export Diversification Performance

This section situates Pakistan's export performance within a cross-country perspective using the Product Diversification Index (PDI) and the Export Market Diversification Index (EMDI), based on total exports and all destination markets.

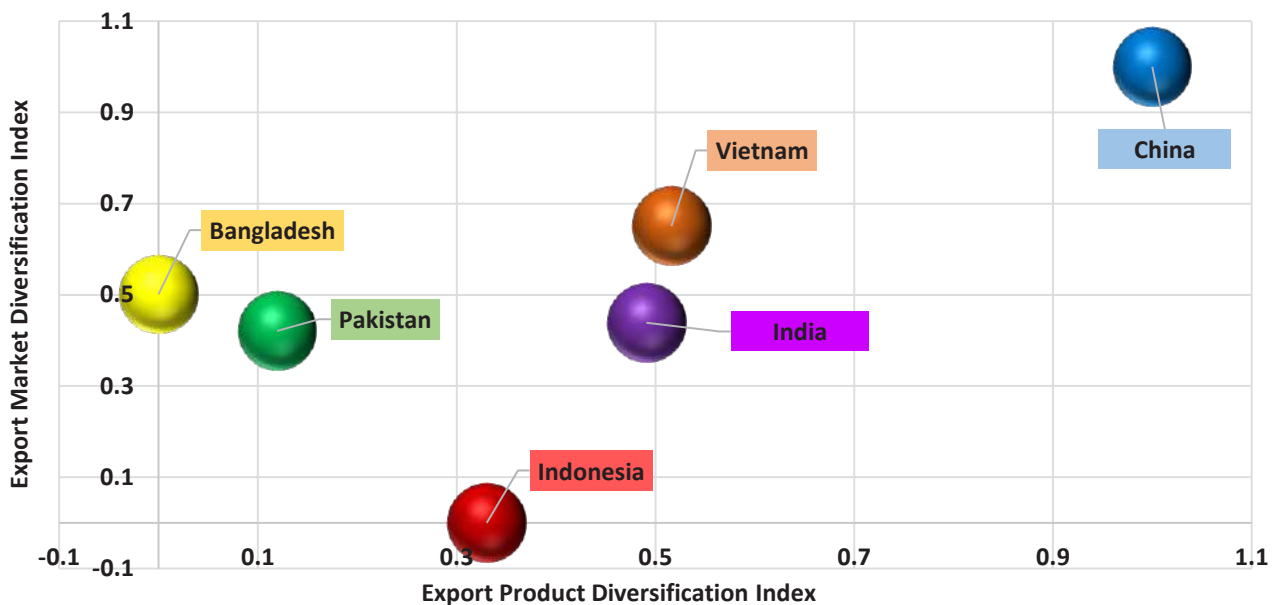
Figure 3.1 compares selected economies across product and market diversification dimensions. Countries positioned toward the upper-right quadrant exhibit higher diversification in both dimensions, reflecting broader export bases, stronger alignment with global demand structures, and lower structural vulnerability.

China is positioned in the upper-right corner, with high values on both dimensions, indicating a highly diversified export structure across products and destination markets. Vietnam also lies in the upper-right quadrant, slightly below China, reflecting strong diversification in both dimensions. India is placed in the mid-to-right region, indicating moderate-to-high product diversification and moderate market diversification. These economies reflect relatively strong alignment of export structures with global demand patterns.

Pakistan is located in the lower-middle left region, indicating limited product diversification and moderate-to-low market diversification. This position suggests a relatively concentrated export structure and weaker alignment with global trade patterns compared to leading peers. In comparison, Pakistan shows slightly higher product diversification than Bangladesh and somewhat better market diversification than Indonesia; however, it remains behind more diversified economies across both dimensions.

This comparison provides the reference point for the subsequent analysis, which examines diversification patterns in greater detail across sectors and Pakistan's major export markets.

Figure 3.1 Comparative Overview of Export Diversification Performance



Source: ITC

3.2 Alignment of Pakistan's Exports with Global and Selected Market Demand

This section presents the sectoral vulnerability matrices for Pakistan's exports across selected destination markets, including China, the United States, the European Union, the United Kingdom, Bangladesh, the United Arab Emirates, Saudi Arabia, Indonesia, Malaysia, Singapore, and Kuwait.

For each market, sectors are mapped using the Product Diversification Index (PDI) and the Export Market Diversification Index (EMDI), capturing alignment with global demand and destination-specific import structures, respectively. The resulting distributions are used to classify sectors within each country-specific vulnerability matrix.

The following sub-sections present the country-wise results sequentially, showing how Pakistan's export sectors are positioned within each selected market in terms of product and market alignment.

3.2.1 Sectoral Diversification of Pakistan's Exports to the United States

Figure 3.2 shows a wide dispersion of sectors across the four quadrants of the vulnerability matrix, reflecting varying degrees of product diversification and alignment with U.S. import demand.

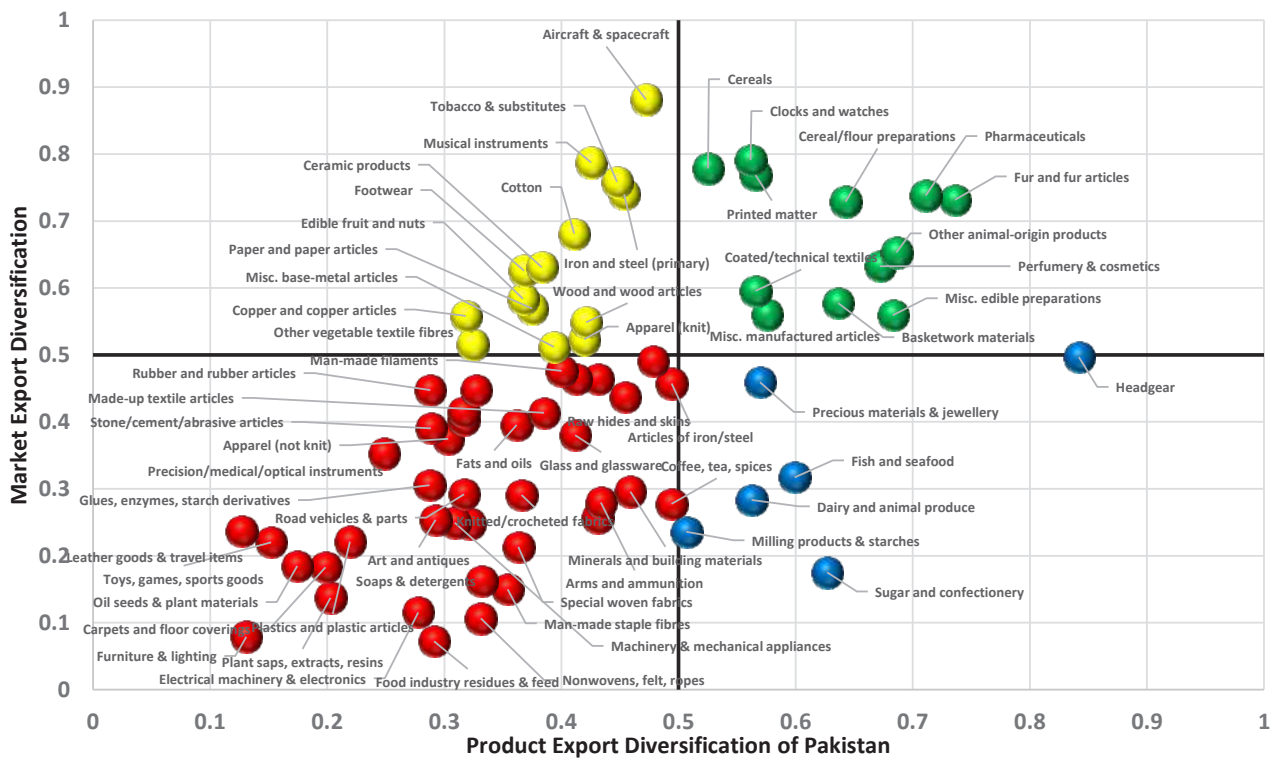
A substantial number of sectors are concentrated in the lower-left quadrant, indicating low product diversification and weak alignment with the U.S. market structure. These include leather goods and travel articles; toys, games and sports goods; carpets and floor coverings; furniture and bedding; plastics and plastic articles; electrical machinery and electronics; food industry residues and animal feed; plant saps and extracts; nonwovens and felt; arms and ammunition; special woven fabrics; machinery and mechanical appliances; and several textile-based categories such as knitted and made-up textile articles. Overall, these sectors reflect narrow product ranges and limited correspondence with U.S. import demand patterns.

The upper-left quadrant includes sectors with relatively better alignment with U.S. import demand but limited product diversification. These include aircraft and spacecraft; tobacco and substitutes; musical instruments; ceramic products; iron and steel (primary forms); cotton; edible fruits and nuts; paper and paper articles; copper and copper articles; miscellaneous base-metal articles; other vegetable textile fibres; and wood and wood articles. These sectors indicate stronger market relevance, but a constrained export product base.

The upper-right quadrant comprises sectors performing strongly on both dimensions, including cereals; cereal and flour preparations; pharmaceuticals; clocks and watches; fur and fur articles; printed matter; coated and technical textiles; perfumery and cosmetics; miscellaneous edible preparations; other animal-origin products; basketwork materials; and miscellaneous manufactured articles. These sectors exhibit both broader product structures and stronger alignment with U.S. import demand.

The lower-right quadrant contains sectors with relatively higher product diversification but weaker alignment with the U.S. market structure, including headgear; precious metals and jewellery; fish and seafood; dairy products; milling products and starches; and sugar and confectionery. These sectors reflect diversified product bases but limited correspondence with U.S. demand composition.

Figure 3.2 Sectoral Diversification of Pakistan's Exports to the United States



Source: ITC

3.2.2 Sectoral Diversification of Pakistan's Exports to China

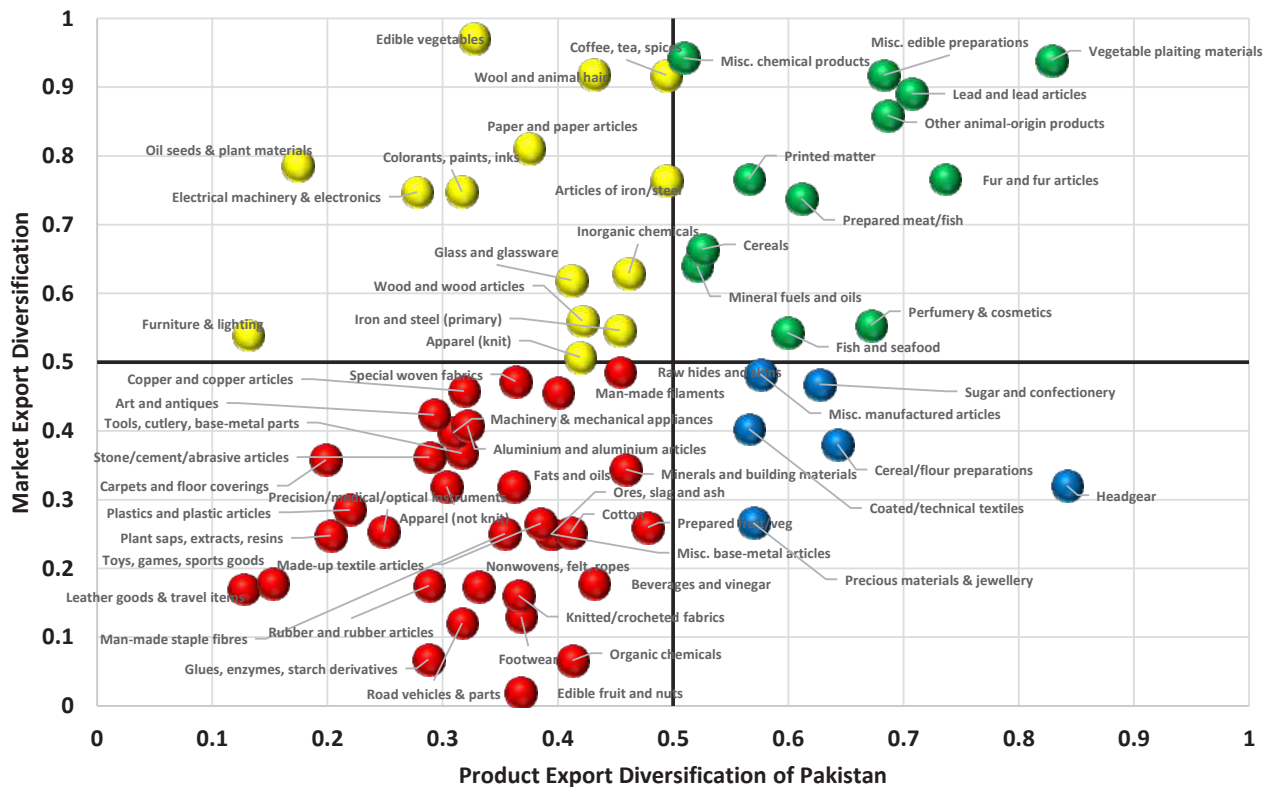
Figure 3.3 shows a pronounced clustering of sectors in the lower-left quadrant, indicating low product diversification and weak alignment with China's import structure. This group includes cotton; ores, slag and ash; copper and copper articles; aluminium and aluminium articles; carpets and floor coverings; plastics and plastic articles; furniture and lighting; leather goods; toys and sports goods; rubber and rubber articles; knitted fabrics; organic chemicals; edible fruits and nuts; machinery and mechanical appliances; road vehicles and parts; special woven fabrics; as well as raw hides and skins, man-made filaments, and prepared fruits and vegetables. The concentration of these sectors in this quadrant reflects relatively high structural vulnerability.

A limited number of sectors are positioned in the upper-right quadrant, indicating stronger performance on both product diversification and market alignment. These include mineral fuels and oils; cereals; fish and seafood; prepared meat and fish; perfumery and cosmetics; miscellaneous chemical products; printed matter; vegetable plaiting materials; lead and lead articles; and other animal-origin products. These sectors demonstrate comparatively better alignment with China's demand structure.

The upper-left quadrant comprises sectors such as edible vegetables; coffee, tea and spices; wool; paper and paper articles; oil seeds; electrical machinery; inorganic chemicals; glass and glassware; wood and wood articles; and iron and steel. These sectors show relatively better alignment with China's import demand but remain limited in terms of product diversification.

The lower-right quadrant includes sectors such as sugar and confectionery; miscellaneous manufactured articles; cereal and flour preparations; coated and technical textiles; headgear; and precious materials and jewellery. These sectors exhibit relatively broader product diversification but weaker alignment with China's import structure.

Figure 3.3 Sectoral Diversification of Pakistan's Exports to China



Source: ITC

3.2.3 Sectoral Diversification of Pakistan's Exports to the United Kingdom

Figure 3.4 shows the distribution of Pakistan's export sectors to the United Kingdom across the vulnerability matrix, reflecting varying degrees of product diversification and alignment with UK import demand.

A large number of sectors are concentrated in the lower-left quadrant, indicating low product diversification and weak alignment with the UK market structure. These include inorganic and organic chemicals; miscellaneous chemical products; arms and ammunition; precious stones and related articles; fish and crustaceans; paper yarn and woven fabrics; other vegetable textile fibres; silk; and prepared feathers and down articles. The positioning of these sectors reflects narrow export bases and limited correspondence with UK import demand.

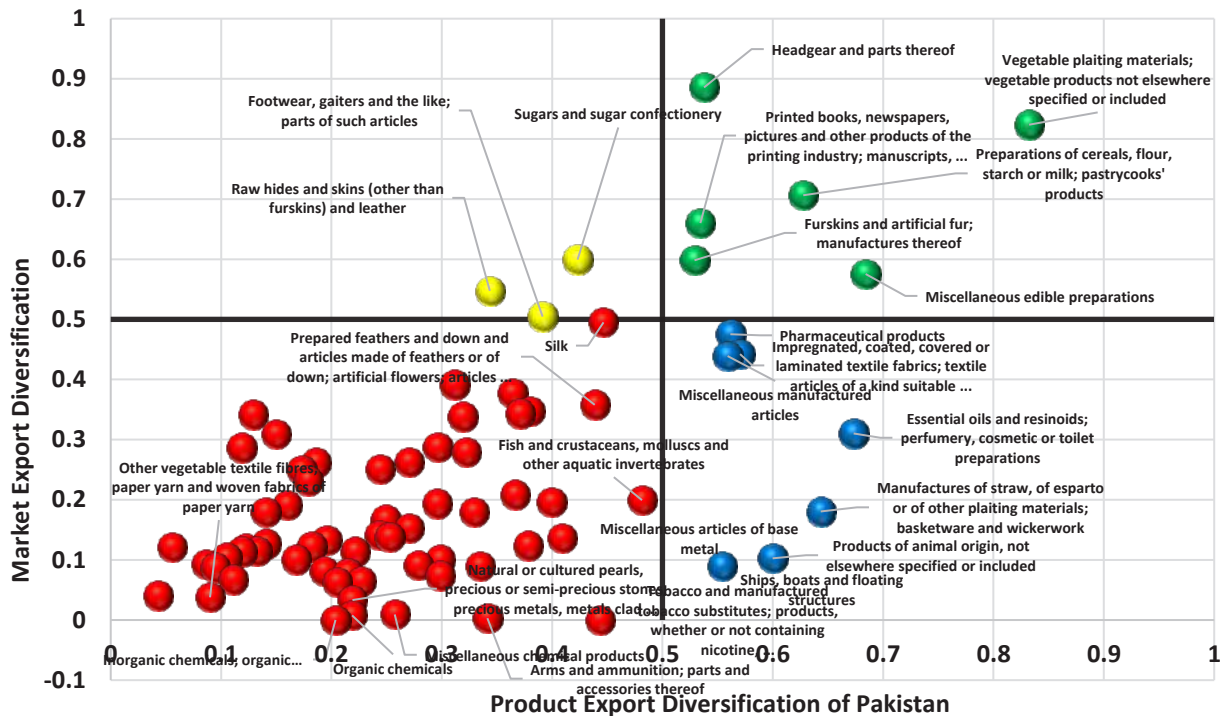
The upper-left quadrant includes sectors with relatively stronger alignment with UK demand but limited product diversification. These include footwear and gaiters; sugar and confectionery; raw hides and skins (excluding fur skins); and leather-related products. These sectors demonstrate closer alignment with the UK's import structure, though their export base remains concentrated.

The upper-right quadrant comprises sectors performing strongly on both dimensions, including headgear; vegetable plaiting materials; printed books and other printed matter; preparations of cereals, flour and starch; fur skins and artificial fur articles; and miscellaneous edible preparations. These sectors exhibit both broader product coverage and stronger alignment with UK import demand.

The lower-right quadrant contains sectors with relatively higher product diversification but weaker alignment with the UK market structure. These include pharmaceutical products; essential oils and perfumery; ships and floating structures; products of animal origin (n.e.s.); manufactures of straw and plaiting materials; and miscellaneous manufactured articles. While these sectors show broader product bases, their export composition is less closely aligned with UK demand patterns.

Overall, the figure indicates that Pakistan's exports to the United Kingdom remain concentrated in sectors with limited diversification and weaker demand alignment, with relatively few sectors positioned strongly across both dimensions.

Figure 3.4 Pakistan's Export performance in the United Kingdom



Source: ITC

3.2.4 Sectoral Diversification of Pakistan's Exports to the European Union

Figure 3.5 presents the distribution of Pakistan's export sectors to the European Union across the vulnerability matrix, indicating generally weak to moderate alignment across both product and market dimensions, with only a limited number of sectors showing stronger performance.

A large concentration of sectors lies in the lower-left quadrant, reflecting low product diversification and weak alignment with EU import demand. These include cotton; wool and animal hair; clocks and watches; explosives and pyrotechnic products; organic chemicals; dairy products and eggs; meat and edible offal; cereals and milling products; fish and crustaceans; tobacco and substitutes; miscellaneous base metals; prepared feathers and down articles; and other primary or low-value manufactured goods. These sectors indicate narrow export structures and limited integration into EU demand patterns.

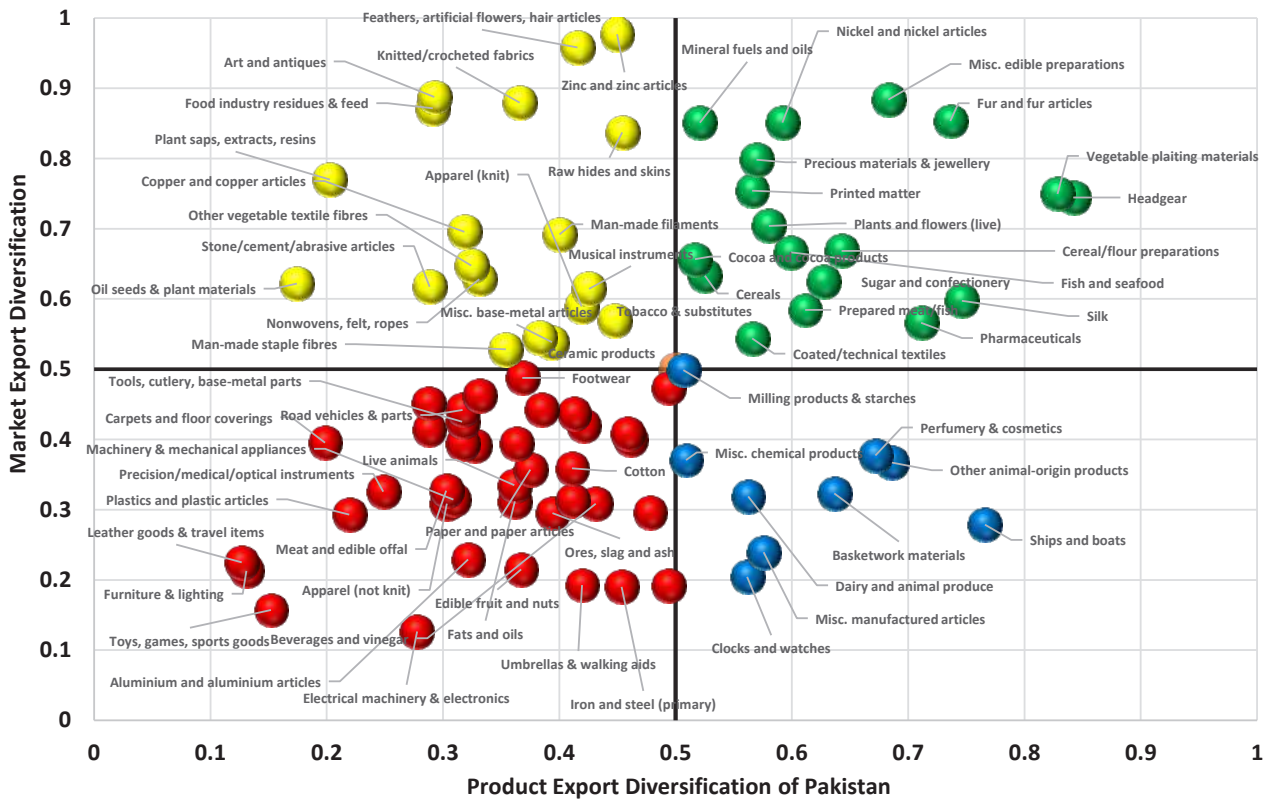
The upper-left quadrant shows minimal sectoral presence, suggesting that few export categories combine strong alignment with EU demand while remaining limited in product diversification.

The upper-right quadrant includes a small set of sectors performing relatively well on both dimensions. These include fertilizers; essential oils and perfumery; vegetable plaiting materials; commodities not elsewhere specified; manufactures of straw and basketwork; and coated or technical textile fabrics. These sectors represent comparatively better-aligned and more diversified export segments within the EU market.

The lower-right quadrant comprises sectors with relatively higher product diversification but weaker alignment with EU demand. These include pharmaceutical products; products of animal origin (n.e.s.); fur skins and artificial fur articles; manufactures of straw and basketware; ships and floating structures; and other selected manufactured goods. While

articles. While these sectors exhibit broader product coverage, their export composition is less closely aligned with the UAE's import structure.

Figure 3.6 Pakistan's Export performance in the UAE



Source: ITC

3.2.6 Sectoral Diversification of Pakistan's Exports to Bangladesh

Figure 3.7 shows a strong concentration of sectors in the lower-left quadrant, indicating low product diversification and weak alignment with Bangladesh's import structure. This cluster includes a wide range of sectors such as cotton-related textiles (including other vegetable textile fibres and paper yarn fabrics), wood and wood articles, clocks and watches, furniture, oil seeds and oleaginous fruits, live animals, aluminium and related articles, silk, miscellaneous base metals, sugar and confectionery, animal or vegetable fats and oils, and prepared feathers and down articles. The dominance of this quadrant reflects a narrow export base and limited correspondence with Bangladesh's demand patterns.

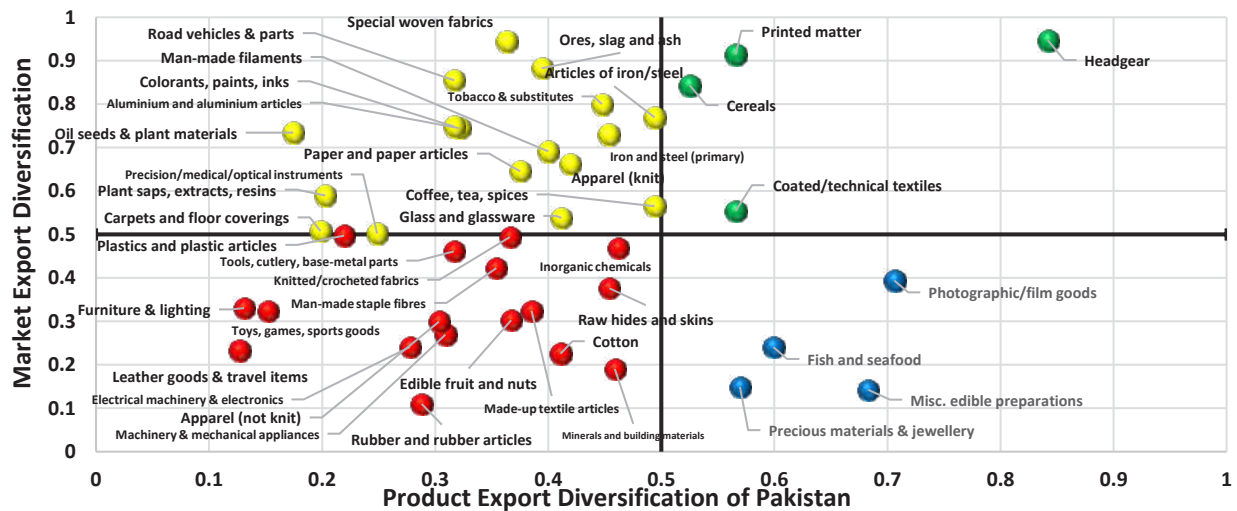
The upper-left quadrant contains a small number of sectors with relatively better alignment with Bangladesh's import demand but limited product diversification. These include fish and crustaceans and salt, sulphur, earths and stone-based products. Mineral fuels and oils appear closer to the mid-range and do not strongly cluster within this quadrant.

The upper-right quadrant includes a limited set of sectors performing strongly on both dimensions, namely preparations of cereals, flour, starch or milk; miscellaneous edible preparations; vegetable plaiting materials; and coated or technical textile fabrics. These sectors demonstrate relatively better alignment with Bangladesh's demand structure alongside broader product coverage.

The lower-right quadrant comprises sectors with relatively higher product diversification but weaker alignment with Bangladesh's import structure. These include pharmaceutical products; essential oils and perfumery; printed matter; headgear; products of animal origin (n.e.s.); and lead and related articles. While these sectors exhibit broader product bases, their export composition remains less consistent with Bangladesh's import demand.

Overall, the figure indicates that Pakistan's exports to Indonesia are largely concentrated in sectors with limited diversification and weaker demand alignment, with only a few sectors positioned strongly across both dimensions.

Figure 3.9 Pakistan's Export performance in Indonesia



Source: ITC

3.2.9 Sectoral Diversification of Pakistan's Exports to Malaysia

Figure 3.10 shows a pronounced concentration of sectors in the lower-left quadrant, indicating low product diversification and weak alignment with Malaysia's import structure. This cluster includes electrical machinery and electronics; rubber and rubber articles; glues, enzymes and starch derivatives; food industry residues and animal feed; precision, medical and optical instruments; iron and steel (primary); beverages and vinegar; cotton; articles of iron and steel; prepared fruits and vegetables; road vehicles and parts; furniture and lighting; carpets and floor coverings; toys, games and sports goods; leather goods and travel articles; oil seeds and plant materials; special woven fabrics; paper and paper articles; footwear; wood and wood articles; and tools, cutlery and base-metal parts. These sectors reflect narrow export bases and limited correspondence with Malaysia's demand patterns.

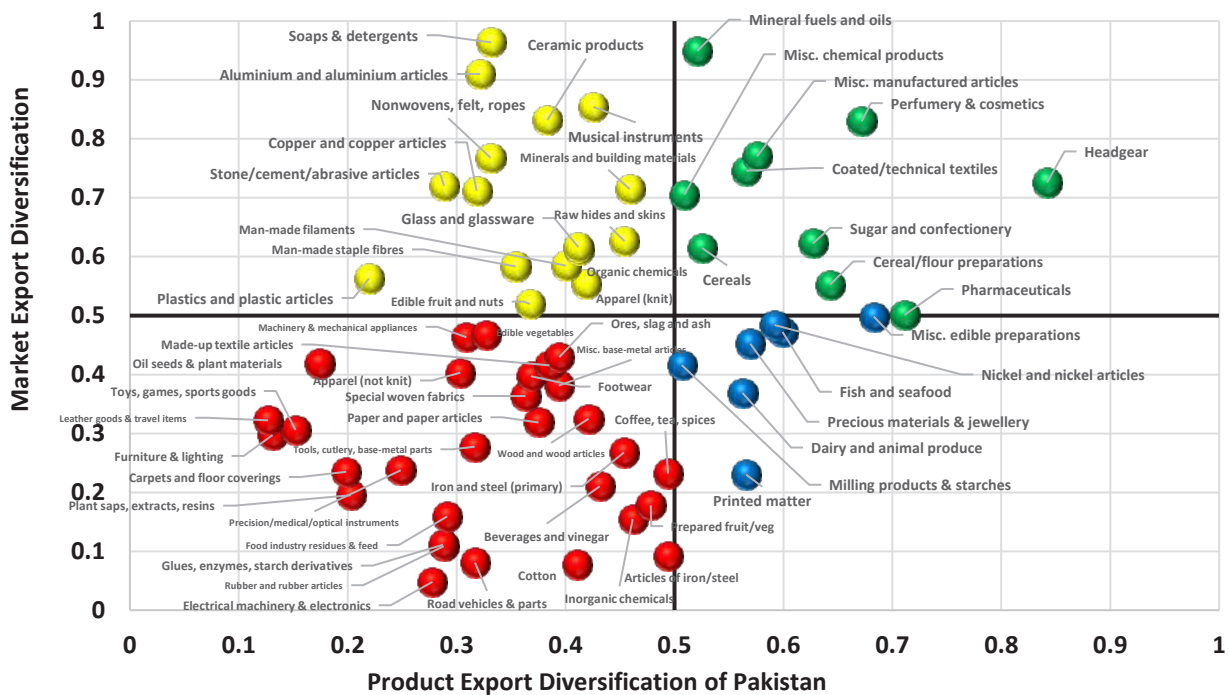
The upper-left quadrant contains sectors with relatively stronger alignment with Malaysia's import demand but limited product diversification. These include soaps and detergents; aluminium and aluminium articles; nonwovens, felt and ropes; copper and copper articles; stone, cement and abrasive articles; man-made filaments; man-made staple fibres; glass and glassware; minerals and building materials; musical instruments; raw hides and skins; ceramic products; and organic chemicals. These sectors indicate better demand alignment but remain concentrated in product scope.

The upper-right quadrant comprises sectors performing strongly on both dimensions, including mineral fuels and oils; miscellaneous chemical products; miscellaneous manufactured articles; perfumery and cosmetics; coated and technical textiles; headgear; sugar and confectionery; cereal and flour preparations; pharmaceuticals; cereals; and selected organic chemical products. These sectors exhibit broader product coverage alongside stronger alignment with Malaysia's import structure.

The lower-right quadrant includes sectors with relatively higher product diversification but weaker alignment with Malaysia's demand patterns. These include printed matter; fish and seafood; precious materials and jewellery; dairy and animal products; milling products and starches; miscellaneous edible preparations; and nickel and nickel articles. While these sectors show broader product bases, their export composition is less closely aligned with Malaysia's import demand.

Overall, the figure indicates that Pakistan's exports to Malaysia remain largely concentrated in low-diversification and weakly aligned sectors, with only a limited number of sectors positioned strongly across both dimensions.

Figure 3.10 Pakistan's Export performance in Malaysia



Source: ITC

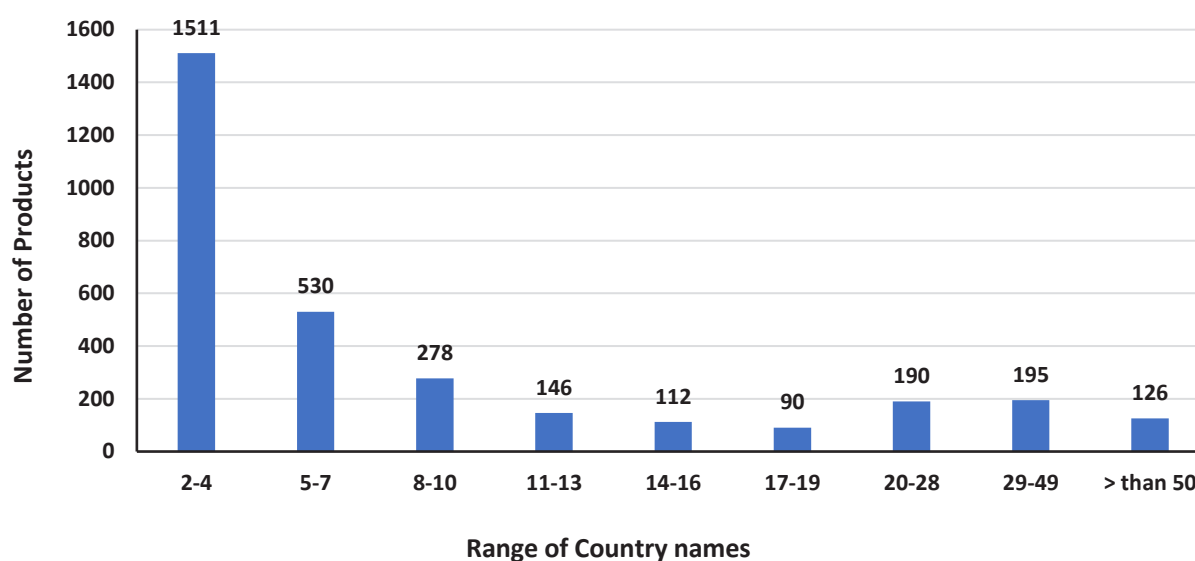
3.3 Product Export Reach and Market Diversification

This section analyzes Pakistan's export structure from two complementary angles: the number of destinations each product reaches and the number of products supplied to each destination. This perspective is essential for assessing the depth of geographical diversification within the existing export basket. By identifying how widely products are distributed across Pakistan's 206 trading partners—and how diversified individual markets are in terms of product intake—the analysis helps uncover concentration patterns, highlight structural gaps, and identify opportunities to expand the reach of already-exported goods.

3.3.1 Product Market Reach Across Destinations

Figure 3.15 presents the distribution of products by the number of destinations markets they serve. Out of 3,178 HS 6-digit products currently exported, 1,511 are sold to only 2–4 countries, indicating that nearly half of the export basket has a very limited geographical footprint. The number declines steadily as destination coverage increases: 530 products reach 5–7 countries, 278 reach 8–10 countries, 146 reach 11–13 countries, 112 reach 14–16 countries, and 90 reach 17–19 countries. Even at wider intervals, broad market penetration remains limited, with 190 products exported to 20–28 countries, 195 to 29–49 countries, and only 126 products reaching more than 50 destinations.

Further, it shows that while Pakistan exports a sizeable range of products, most have limited international reach. Only a small share of products achieve broad geographical diversification. This concentration suggests significant scope to expand the market presence of existing products, thereby strengthening export diversification and enhancing resilience against demand shocks in individual markets.

Figure 3.11 Product Market Reach Across Destinations

Source: WITS

3.3.2 Product Penetration Across Export Markets

Table 3.1 presents the distribution of Pakistan's exported products across destination countries, measured by the number of HS 6-digit products supplied to each market. This perspective highlights the depth of product penetration in individual destinations and helps assess the extent of geographical diversification within the existing export basket.

The distribution shows a high concentration of products in a limited number of markets. The United Arab Emirates receives the largest number of products (1,677), followed by the United States (1,293), the United Kingdom (1,227), Germany (983), and Saudi Arabia (913). A second group—including Italy, Afghanistan, Canada, Australia, the Netherlands, and China—imports between roughly 600 and 750 products. These markets account for the broadest coverage of Pakistan's export basket and reflect relatively deeper trade integration.

Beyond these destinations, product coverage declines steadily. A sizeable number of countries import between 100 and 300 products, indicating moderate engagement but limited diversification. At the lower end of the distribution, many markets receive fewer than 50 products, and several import fewer than 10. In some cases, only one or two products are exported to a destination, reflecting minimal market penetration. The details of product distribution across markets are presented in the following table.

Table 3.1 Destination-Wise Distribution of Exported Products (HS 6-Digit Level) in 2024

Country Name	Products	Country Name	Products	Country Name	Products	Country Name	Products	Country Name	Products
UAE	1677	Mexico	251	Yemen	106	Ukraine	32	Equatorial Guinea	8
US	1293	Jordan	248	Tunisia	105	Rwanda	32	Burkina Faso	8
UK	1227	Indonesia	239	Uruguay	103	Bermuda	32	Vanuatu	7
Germany	983	Norway	235	Libya	97	Barbados	32	Syrian Arab Rep,	7
Saudi Arabia	913	Mozambique	234	Ecuador	96	Gabon	31	St. Kitts and Nevis	7
Italy	737	Czech Republic	231	Latvia	95	Bolivia	30	East Timor	7
Afghanistan	734	Switzerland	228	Malta	93	Honduras	29	Antigua and Barbuda	7
Canada	731	Brazil	228	Trinidad and Tobago	89	French Polynesia	27	Niger	6
Australia	671	Austria	222	Fiji	82	Venezuela	25	Macao	6
Netherlands	647	Egypt, Arab Rep.	214	Georgia	81	Papua New Guinea	24	Lesotho	6
China	618	Chile	208	Cambodia	79	Belarus	22	Solomon Islands	5
France	596	Philippines	199	Guatemala	78	Ethiopia	20	Northern Mariana Isl,	5
Oman	592	Iraq	196	Serbia,	74	Unspecified	19	South Sudan	4
Malaysia	571	Nigeria	195	Paraguay	73	Liberia	19	Guinea-Bissau	4
Spain	569	Ghana	190	Albania	72	Haiti	18	British Virgin Isl,	4
Belgium	533	Bulgaria	188	Cameroon	69	Luxembourg	16	Aruba	4
South Africa	523	Finland	186	Gambia, The	62	Bosnia	16	San Marino	3
Qatar	502	Taiwan, China	185	Guyana	61	St. Lucia	15	Kiribati	3
Turkey	441	Hungary	171	Azerbaijan	55	Namibia	15	Iran, Islamic Rep.	3
Bangladesh	431	Uzbekistan	170	Seychelles	54	Myanmar	15	Gibraltar	3
Kuwait	424	Slovenia	164	Congo, D. Rep.	54	Mongolia	15	Burundi	3
Sri Lanka	422	Senegal	158	Uganda	53	Eswatini	15	Armenia	3
Japan	418	Croatia	158	El Salvador	51	Congo, Rep.	15	American Samoa	3
Hong Kong,	388	Lithuania	155	Dominican Rep,	51	Turkmenistan	14	Tuvalu	2
Poland	387	Morocco	153	Costa Rica	51	Moldova	14	Sao Tome and Principe	2
Greece	369	Peru	150	Malawi	50	St. V & G	13	Saint Maarten	2
Sweden	352	Colombia	150	Togo	47	Guam	13	North Macedonia	2
Bahrain	352	Djibouti	148	Iceland	47	Comoros	13	Greenland	2
Thailand	351	Madagascar	145	Zimbabwe	46	Grenada	12	Wallis and Futura Isl.	1
Ireland	342	Maldives	144	Angola	46	Bahamas, The	12	United States MO	1
Kenya	336	Russian Federation	142	Zambia	45	Suriname	11	Turks and Caicos Isl.	1
Singapore	333	Panama	132	Sudan	45	New Caledonia	11	Tonga	1
Korea, Rep.	333	Kyrgyz Republic	131	Jamaica	45	Montenegro	10	Saint Barthélemy	1
Denmark	319	Guinea	129	Brunei	44	Lao PDR	10	India	1
Portugal	317	Somalia	126	Cote d'Ivoire	42	Chad	10	Falkland Island	1
Tanzania	306	Cyprus	126	Nepal	40	Belize	10	Faeroe Islands	1
New Zealand	277	Estonia	125	Benin	39	Dominica	9	Eritrea	1
Mauritius	267	Argentina	124	Sierra Leone	36	Curaçao	9	Cook Islands	1
Vietnam	263	Algeria	121	Tajikistan	35	Cayman Islands	9	Central African Rep,	1
Romania	258	Slovak Republic	112	Botswana	35	Nicaragua	8	Cape Verde	1
Kazakhstan	254	Lebanon	109	Mauritania	33	Mali	8	Andorra	1

Source: WITS, Note, MO= Minor Outlying , V&G= Vincent and the Grenadines

ASSESSMENT OF PAKISTAN'S EXPORT POTENTIAL IN SELECTED MARKETS



Chapter 4

ASSESSMENT OF PAKISTAN'S EXPORT POTENTIAL IN SELECTED MARKETS

4.1 Analysis of Pakistan's Export Growth Opportunities in Existing

International Markets

This chapter identifies Pakistan's export growth opportunities in selected international markets using the Export Potential Indicator (EPI) developed by the International Trade Centre (ITC) and applied through the ITC Export Potential Map and Trade Map tools. The analysis identifies product-market combinations at the HS-6 digit level where Pakistan demonstrates unrealized export potential despite an existing export presence, thereby indicating opportunities for further expansion in established export products and destination markets.

The ITC Export Potential methodology estimates export opportunities by assessing the interaction of three key factors: Pakistan's export supply capacity, import demand in destination markets, and the relative ease of bilateral trade. The framework incorporates information on existing export specialization, market size and growth, tariff conditions, trade costs, geographic proximity, and bilateral trade linkages to estimate potential export values for specific products and markets. A comparison between estimated export potential and actual export performance provides an indication of unrealized export potential, highlighting areas where exports remain below achievable levels under prevailing market conditions.

Based on this framework, the chapter focuses on products that Pakistan already exports and where additional scope for market expansion exists. The analysis compares estimated export potential, baseline exports, unrealized export potential, market import demand, Pakistan's export performance, and applicable tariff conditions to identify priority product-market opportunities for export growth. The findings provide an evidence-based assessment of sectors where Pakistan can strengthen its export presence and better utilize untapped opportunities in existing international markets.

4.2 Pakistan's Export Growth Opportunities in Key International Markets

This section presents a market-wise assessment of Pakistan's export growth opportunities in selected key international markets. Using the International Trade Centre's Export Potential framework, the analysis identifies products where Pakistan already maintains an export presence but possesses additional scope for expansion based on estimated export potential and destination market demand. The assessment highlights product-market opportunities where actual exports remain below estimated potential, thereby indicating areas for strengthening export performance and expanding Pakistan's export presence across major international markets.

4.2.1 Pakistan's Export Potential in the United States Market

The United States market presents a broad set of unrealized export opportunities for Pakistan across agro-based products, textiles and apparel, industrial inputs, and selected manufacturing goods. The distribution of estimated export potential relative to baseline export performance indicates that multiple product categories remain underexploited despite Pakistan's established export presence in the US market, reflecting substantial scope for further expansion in a highly competitive and standards-driven economy.

Agricultural and food products constitute a major component of unrealized export potential. Key products include semi-milled and milled rice, maize, sesame seeds, citrus fruits, guavas and mangoes, onions and shallots, potatoes, dates, and food preparations. Seafood and aquatic products, including frozen fish, crustaceans, and other marine categories, also contribute significantly to the opportunity set. These products reflect strong underlying import demand in the US market; however, their performance is constrained primarily by stringent quality standards, regulatory compliance requirements, and non-tariff measures.

Textiles and apparel represent another important source of unrealized export potential. Products such as cotton T-shirts, men's and women's cotton trousers, knitted garments, bedlinen, terry towels, stockings, gloves, denim fabrics, jerseys, pullovers, and made-up textile articles exhibit consistent gaps between estimated export potential and baseline exports. Despite Pakistan's established export footprint in this sector, several categories remain below their modelled export capacity, particularly in value-added and differentiated textile segments.

Industrial inputs and manufacturing-related products also show notable unrealized export potential. These include aluminium alloys, refined copper, polystyrene, PET primary forms, cement clinkers, marble, salt, talc, and selected chemical and intermediate goods. Leather products such as apparel, footwear, and gloves further indicate targeted opportunities within higher-value segments of industrial and consumer demand.

Overall, the United States market reflects a diversified structure of unrealized export potential, with opportunities concentrated in agro-food products, textiles and apparel, and selected industrial inputs. The realisation of this potential is primarily influenced by non-tariff barriers, quality and compliance requirements, and competitive market dynamics rather than tariff protection alone.

Table 4.1 Pakistan's Export Potential in the United States Market

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	US Imports (mn)	Pakistan Exports (mn)	US Tariff
630260	Toilet/kitchen linen	617.00	467.00	150.00	2,000.00	1,100.00	0.09
630231	Bedlinen (cotton)	583.00	226.00	358.00	1,300.00	1,200.00	0.11
620342	Men's trousers (cotton)	371.00	247.00	124.00	4,800.00	1,400.00	0.09
630210	Bedlinen (knit)	242.00	160.00	82.00	376.00	542.00	0.06
9404XX	Bedding articles	158.00	130.00	27.00	3,700.00	234.00	---
100630	Rice	141.00	36.00	105.00	1,200.00	2,200.00	0.06
630239	Bedlinen (other)	134.00	101.00	32.00	261.00	498.00	0.04
630232	Bedlinen (man-made fibre)	132.00	33.00	99.00	871.00	217.00	0.13
90XXXX	Medical instruments	120.00	111.00	9.40	19 000	428.00	-
420329	Leather gloves	117.00	96.00	21.00	330.00	312.00	0.13
6116	Gloves (knit)	105.00	62.00	42.00	1,100.00	286.00	0.10
950662	Inflatable balls	105.00	24.00	80.00	303.00	249.00	0.00
420310	Leather apparel	77.00	38.00	39.00	327.00	278.00	0.03
30XXXX	Medicaments	75.00	0.24	75.00	68,000.00	182.00	---
610342	Men's trousers (knit)	68.00	62.00	6.40	1,200.00	249.00	0.13
252329	Portland cement	56.00	4.30	52.00	1,700.00	150.00	0.00
570110	Wool carpets	46.00	42.00	4.40	293.00	70.00	0.01
300439	Medicaments (hormones)	46.00	700.00	46.00	8,100.00	93.00	0.00
950699	Sports equipment	41.00	13.00	28.00	2,300.00	58.00	0.00
610462	Women's trousers (knit)	38.00	23.00	15.00	1,600.00	188.00	0.13
420321	Sports gloves	36.00	16.00	20.00	271.00	58.00	0.00
630790	Textile articles (other)	35.00	33.00	1.90	5,800.00	70.00	0.02
210690	Food preparations	35.00	5.10	30.00	7,100.00	98.00	0.13
220710	Ethyl alcohol	35.00	0.00	35.00	377.00	417.00	0.01
640399	Footwear	31.00	7.40	23.00	5,600.00	92.00	0.06
630629	Tents	31.00	3.80	28.00	72.00	81.00	0.05

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	US Imports (mn)	Pakistan Exports (mn)	US Tariff
630391	Curtains	30.00	21.00	9.00	93.00	58.00	0.10
630222	Printed bedlinen	30.00	4.90	25.00	317.00	118.00	0.13
0805XX	Citrus fruits	30.00	0.00	30.00	623.00	139.00	---
630130	Blankets	29.00	28.00	1.00	182.00	41.00	0.08
610343	Men's trousers (synthetic)	27.00	13.00	14.00	1,400.00	71.00	0.20
0306Xa	Shrimps (frozen)	26.00	0.00	26.00	5,200.00	69.00	---
841451	Electric fans	26.00	0.39	26.00	2,100.00	28.00	0.00
611120	Babies garments	24.00	12.00	13.00	1,500.00	67.00	0.14

Source: ITC

4.2.2 Pakistan's Export Potential in the Chinese Market

The Chinese market presents substantial unrealized export potential for Pakistan across a wide range of product categories, including minerals, textiles and apparel, agricultural commodities, seafood, and selected manufactured goods.

Among primary and resource-based products, significant unrealized export potential is observed in refined copper, sesamum seeds, broken rice, frozen fish, aquatic invertebrates, iron and chromium ores, maize, marble, salt, and fresh fruits such as guavas and mangoes. These products are supported by strong import demand in China, suggesting considerable scope for strengthening Pakistan's position in resource-intensive and agro-based export segments.

In textiles and apparel, a broad range of products demonstrates notable unrealized potential, including cotton T-shirts, men's and women's cotton trousers, denim fabric, cotton sweaters, cotton shirts, terry towels, bedding articles, leather apparel, and hosiery products.

Additional opportunities are evident in manufactured and industrial products such as medical instruments, medicaments, beauty products, PET-based products, polystyrene, cement clinkers, footwear, food preparations, vegetable oils, and inflatable balls.

Table 4.2 Pakistan's Export Potential in the Chinese Market

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	China Imports (\$ mn)	Pakistan Exports (\$ mn)	Tariff (%)
0802Xd	Nuts	19.00	19.00	0.29	462.00	28.00	---
0303Xb	Flatfish	13.00	7.90	5.00	171.00	15.00	---
610342	Men's knit trousers	16.00	8.50	7.70	98.00	249.00	0.00
740329	Copper alloys	30.00	22.00	8.10	747.00	22.00	0.00
611595	Cotton stockings	15.00	6.90	8.30	27.00	457.00	0.00
950662	Inflatable balls	19.00	9.70	8.90	21.00	249.00	0.00
260111	Iron ores	34.00	24.00	9.40	123,000.00	27.00	0.00
0306Xa	Frozen shrimp	32.00	23.00	9.60	5,500.00	69.00	---
261000	Chromium ores	111.00	100.00	11.00	3,500.00	116.00	0.00
610990	Other T-shirts	12.00	1.70	11.00	181.00	204.00	0.00
740321	Brass	20.00	8.30	12.00	921.00	8.40	0.00
610510	Men's cotton shirts	14.00	0.70	13.00	125.00	128.00	0.00
630260	Terry towels	13.00	0.19	13.00	18.00	1,100.00	0.00
3907Xb	PET primary forms	13.00	0.02	13.00	463.00	189.00	---
392062	PET sheets	13.00	0.00	13.00	1,700.00	45.00	0.00
9404XX	Bedding articles	15.00	0.03	15.00	39.00	234.00	---
611020	Cotton sweaters	30.00	14.00	16.00	449.00	727.00	0.00
390319	Polystyrene	20.00	3.80	16.00	798.00	64.00	0.00
252310	Cement clinkers	20.00	3.60	16.00	323.00	122.00	0.00

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	China Imports (\$ mn)	Pakistan Exports (\$ mn)	Tariff (%)
330499	Beauty products	17.00	0.77	16.00	12,000.00	14.00	0.00
30XXXX	Medicaments	16.00	0.00	16.00	1,600.00	182.00	---
251512	Marble	26.00	8.90	17.00	896.00	12.00	0.00
250100	Salt	23.00	4.80	19.00	338.00	79.00	0.00
620462	Women's trousers	23.00	3.10	19.00	154.00	788.00	0.00
640399	Footwear	20.00	0.11	20.00	1,600.00	92.00	0.00
1516XX	Vegetable oils	24.00	0.00	24.00	1,000.00	48.00	---
100590	Maize	31.00	0.00	31.00	5,500.00	254.00	0.65
03XXXX	Aquatic invertebrates	77.00	44.00	33.00	1,900.00	99.00	---
610910	Cotton T-shirts	48.00	13.00	34.00	571.00	476.00	0.00
520942	Denim fabric	37.00	3.30	34.00	72.00	468.00	0.00
210690	Food preparations	35.00	0.64	34.00	4,100.00	98.00	0.03
420310	Leather apparel	40.00	1.00	39.00	111.00	278.00	0.00
620342	Men's cotton trousers	44.00	3.70	40.00	199.00	1,400.00	0.00
100640	Broken rice	139.00	96.00	43.00	582.00	427.00	0.10
90XXXX	Medical instruments	58.00	13.00	45.00	4,500.00	428.00	---
120740	Sesamum seeds	243.00	197.00	46.00	1,700.00	283.00	0.00
0303Xa	Frozen fish, n.e.s.	105.00	57.00	47.00	2,200.00	105.00	---
80450	Guavas, mangoes	93.00	0.05	93.00	675.00	117.00	0.00
740319	Refined copper, n.e.s.	889.00	579.00	310.00	1,700.00	581.00	0.00

Source: ITC

4.2.3 Pakistan's Export Potential in the United Kingdom Market

The United Kingdom market reveals a diversified set of untapped export opportunities for Pakistan across textiles and apparel, food and agricultural products, leather goods, and selected light manufactured items.

Within textiles and apparel, the strongest concentration of opportunities is observed across a wide range of value-added and household textile products. These include cotton bedlinen, terry towels, made-up textile articles, cotton T-shirts and vests, men's and women's cotton trousers, knitted garments, hosiery products, gloves, underwear, babies' garments, tents, and textile cleaning cloths.

In agro-based and food-related products, multiple items indicate room for enhanced export penetration. Key products such as spice mixtures, cane molasses, semi/wholly milled rice, broken rice, citrus fruits, and onions and shallots show meaningful scope for expansion, supported by consistent import demand in the UK.

Beyond these segments, additional export space is visible in leather apparel, leather footwear, leather gloves, medicaments, ethyl alcohol, inflatable balls, and synthetic stockings, where current export levels remain comparatively lower than estimated potential.

Table 4.3 Pakistan's Export Potential in the United Kingdom Market

HS Code	Product Description	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	UK Imports (\$ mn)	Pakistan Exports (\$ mn)	Tariff (%)
91091	Spice mixtures	10.00	9.70	0.35	33.00	71.00	0.00
610462	Women's cotton trousers (knit)	18.00	18.00	0.53	430.00	187.00	0.00
170310	Cane molasses	9.10	8.60	0.53	83.00	38.00	0.00
610510	Men's cotton shirts (knit)	22.00	22.00	0.64	304.00	128.00	0.00
610339	Men's jackets (knit)	20.00	18.00	1.30	32.00	114.00	0.00
610342	Men's cotton trousers (knit)	27.00	24.00	2.50	258.00	250.00	0.00
630790	Made-up textile articles	9.50	6.40	3.00	859.00	70.00	0.00

HS Code	Product Description	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	UK Imports (\$ mn)	Pakistan Exports (\$ mn)	Tariff (%)
611120	Babies' cotton garments	11.00	4.80	5.80	433.00	66.00	0.00
611599	Stockings (n.e.s.)	9.60	3.80	5.80	43.00	43.00	0.00
630900	Used textiles	9.70	3.20	6.50	62.00	215.00	0.00
620342	Men's cotton trousers/shorts	80.00	73.00	7.60	745.00	1,400.00	0.00
420310	Leather apparel	24.00	16.00	7.90	122.00	278.00	0.00
30XXXX	Medicaments	8.40	0.45	7.90	14,000.00	180.00	–
620462	Women's cotton trousers	45.00	36.00	8.10	662.00	790.00	0.00
640399	Leather footwear	12.00	4.10	8.10	1,200.00	91.00	0.00
70310	Onions & shallots	8.20	0.04	8.20	288.00	131.00	0.00
611596	Synthetic stockings	12.00	2.80	9.40	156.00	84.00	0.00
6116	Gloves & mittens (knit)	30.00	19.00	11.00	189.00	285.00	0.00
420329	Leather gloves	20.00	8.80	11.00	39.00	311.00	0.00
100640	Broken rice	12.00	0.50	11.00	37.00	429.00	0.00
630210	Bedlinen (knit)	41.00	28.00	12.00	51.00	541.00	0.00
950662	Inflatable balls	26.00	14.00	12.00	58.00	248.00	0.00
0805XX	Citrus fruits	12.00	0.21	12.00	374.00	133.00	–
630260	Toilet/kitchen linen (terry)	104.00	91.00	13.00	227.00	1,100.00	0.00
610990	T-shirts (knit, n.e.s.)	33.00	20.00	13.00	672.00	203.00	0.00
630231	Bedlinen of cotton, n.e.s.	163.00	146.00	17.00	250.00	1,200.00	0.00
610711	Men's cotton underwear	19.00	1.80	17.00	248.00	109.00	0.00
630629	Tents	18.00	0.58	17.00	33.00	80.00	0.00
610910	Cotton T-shirts & vests	71.00	51.00	21.00	1,600.00	476.00	0.00
630710	Textile cleaning cloths	47.00	18.00	28.00	118.00	360.00	0.00
611595	Cotton stockings (knit)	74.00	45.00	30.00	339.00	457.00	0.00
100630	Semi/wholly milled rice	71.00	37.00	34.00	389.00	2,200.00	0.00
220710	Ethyl alcohol ≥80%	65.00	20.00	45.00	568.00	414.00	0.00

Source: ITC

4.2.4 Pakistan's Export Potential in the United Arab Emirates Market

Textiles and apparel represent the most prominent area of unrealized export potential. Products such as cotton bedlinen, knitted bedlinen, terry towels, cotton T-shirts and vests, men's and women's cotton trousers, knitted shirts and pullovers, hosiery items, stuffed bedding articles, textile cleaning cloths, tents, and printed cotton fabrics show persistent gaps between estimated potential and actual export performance.

In livestock and agro-based products, notable opportunities are observed in bovine and sheep carcasses, cereal straw and husks, spice mixtures, food preparations, sweet biscuits, chewing gum, and birds' eggs, reflecting potential for strengthening

Additional unrealized potential is evident in leather apparel and gloves, refined copper, polyethylene terephthalate (PET), polystyrene, wooden fibreboard, jewellery, medicaments, and selected consumer goods, where export levels remain below estimated capacity.

Table 4.4 Pakistan's Export Potential in the United Arab Emirates Market

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	UAE Imports (\$ mn)	Pakistan Exports (\$ mn)	UAE Tariff
20110	Bovine carcasses, fresh	187.00	125.00	62.00	130.00	270.00	0.00
620322	Men's ensembles of cotton	59.00	43.00	16.00	52.00	925.00	0.05
630900	Used textiles & textile articles	47.00	7.30	39.00	229.00	217.00	0.05
620342	Men's cotton trousers & shorts	35.00	25.00	10.00	259.00	1,400.00	0.05
121300	Cereal straw & husks	32.00	23.00	8.80	31.00	55.00	0.00

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	UAE Imports (\$ mn)	Pakistan Exports (\$ mn)	UAE Tariff
610910	T-shirts & vests of cotton (knit)	31.00	8.70	23.00	572.00	476.00	0.05
630260	Terry fabric toilet/kitchen linen	30.00	16.00	13.00	80.00	1,100.00	0.05
630629	Tents (n.e.s.)	24.00	12.00	12.00	22.00	81.00	0.05
630231	Cotton bedlinen	24.00	8.90	15.00	39.00	1,200.00	0.05
950662	Inflatable balls	21.00	9.50	11.00	22.00	249.00	0.05
610590	Men's knit shirts (n.e.s.)	18.00	3.10	15.00	27.00	222.00	0.05
3907Xb	Polyethylene terephthalate	17.00	11.00	6.10	375.00	189.00	---
610349	Men's knit trousers (n.e.s.)	14.00	6.90	7.00	30.00	217.00	0.05
630239	Bedlinen (n.e.s.)	13.00	7.30	6.10	9.90	498.00	0.05
610342	Men's knit cotton trousers	13.00	6.70	6.20	123.00	249.00	0.05
91091	Mixtures of spices	12.00	6.10	6.10	29.00	71.00	0.05
611090	Jerseys & pullovers (n.e.s.)	11.00	8.30	2.30	23.00	354.00	0.05
630210	Knit bedlinen	11.00	4.50	6.20	10.00	542.00	0.05
620462	Women's cotton trousers	10.00	8.50	1.60	140.00	788.00	0.05
610990	T-shirts & vests (n.e.s.)	10.00	3.10	6.90	200.00	204.00	0.05
611595	Cotton stockings	10.00	2.70	7.70	50.00	457.00	0.05
20421	Sheep carcasses	9.90	2.10	7.70	77.00	20.00	0.00
520851	Printed cotton woven fabric	9.80	0.27	9.50	53.00	12.00	0.05
420310	Leather apparel	9.10	1.70	7.40	28.00	278.00	0.05
611020	Cotton jerseys/pullovers	8.70	5.90	2.80	226.00	727.00	0.05
9404XX	Stuffed bedding articles	8.70	4.10	4.60	151.00	234.00	---
620349	Men's trousers (n.e.s.)	8.70	1.30	7.30	58.00	123.00	0.05
420329	Leather gloves	8.60	7.20	1.40	12.00	312.00	0.05
740319	Refined copper	7.60	2.10	5.50	13.00	581.00	0.05
711319	Jewellery of precious metal	7.20	7.10	0.16	14,000.00	21.00	0.05
630710	Textile cleaning cloths	7.20	1.70	5.50	20.00	360.00	0.05
210690	Food preparations (n.e.s.)	6.80	3.40	3.40	721.00	98.00	0.05
170410	Chewing gum	5.80	4.20	1.60	56.00	35.00	0.05
610339	Men's knit jackets	5.80	2.90	2.90	7.10	115.00	0.05
441193	Wooden fibreboard	5.80	0.01	5.80	30.00	22.00	0.05
30XXXX	Medicaments (retail)	5.50	2.00	3.50	2,500.00	182.00	---
551341	Polyester-cotton woven fabric	5.20	2.50	2.70	5.50	75.00	0.05
407	Birds' eggs in shell	5.10	4.90	0.19	166.00	20.00	0.03
390319	Polystyrene	5.10	4.10	1.10	47.00	64.00	0.05
190531	Sweet biscuits	5.10	2.70	2.40	141.00	34.00	0.05

Source: ITC

4.2.5 Pakistan's Export Potential in the EU Market

The European market presents substantial unrealized export opportunities for Pakistan, concentrated primarily in textiles and apparel, home textiles, agricultural commodities, medical products, and selected industrial manufactures.

Textiles and apparel dominate the unrealized export potential, reflecting Pakistan's existing comparative advantage in labor-intensive manufacturing. Significant opportunities are evident in cotton bedlinen, terry toilet and kitchen linen, knit bedlinen, cotton T-shirts and vests, jerseys and pullovers, knitted gloves, stockings, undergarments, babies' garments, and men's and women's cotton trousers and shirts. Home textile products, including stuffed bedding articles, textile cleaning cloths, tents, and other made-up textile articles, also demonstrate considerable untapped export potential. In agricultural and food commodities, unrealized potential is visible in milled rice, brown rice, broken rice, maize, sesame seeds, citrus fruits, tropical fruits, and aquatic invertebrates.

In industrial and higher-value manufactured goods, products such as medical instruments, medicaments, PET (polyethylene terephthalate), refined copper, leather apparel, leather gloves, footwear, and ethyl alcohol exhibit measurable export gaps relative to estimated market potential.

Table 4.5 Pakistan's Export Potential in the EU market

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	Europe Imports (mn)	Pakistan Exports (mn)
630231	Cotton bedlinen (n.e.s.)	1,000.00	864.00	174.00	2,000.00	1,200.00
620342	Men's cotton trousers & shorts	967.00	972.00	82.00	14,000.00	1,400.00
630260	Terry toilet & kitchen linen	709.00	536.00	182.00	2,200.00	1,100.00
610910	Cotton T-shirts & vests (knit)	554.00	226.00	328.00	19,000.00	476.00
630210	Knit bedlinen	533.00	347.00	190.00	924.00	541.00
611595	Cotton stockings (knit)	525.00	280.00	264.00	4,100.00	457.00
100630	Milled rice	489.00	244.00	263.00	3,000.00	2,200.00
620462	Women's cotton trousers & shorts	460.00	460.00	57.00	10,000.00	790.00
611020	Cotton jerseys & pullovers	387.00	392.00	59.00	14,000.00	728.00
100620	Brown rice	387.00	344.00	66.00	1,000.00	366.00
630710	Textile cleaning cloths	332.00	58.00	274.00	1,200.00	360.00
6116	Knitted gloves & mittens	323.00	160.00	164.00	2,400.00	285.00
90XXXX	Medical instruments (n.e.s.)	308.00	170.00	167.00	28,000.00	425.00
630239	Bedlinen (n.e.s.)	298.00	322.00	36.00	488.00	497.00
420329	Leather gloves (n.e.s.)	290.00	137.00	154.00	707.00	311.00
220710	Ethyl alcohol (≥80%)	280.00	260.00	103.00	6,200.00	414.00
950662	Inflatable balls	254.00	138.00	119.00	670.00	248.00
420310	Leather apparel (n.e.s.)	245.00	215.00	68.00	1,500.00	278.00
610990	Knitted T-shirts & vests (n.e.s.)	210.00	89.00	121.00	6,800.00	203.00
610342	Men's cotton trousers (knit)	185.00	138.00	65.00	2,700.00	250.00
620322	Men's cotton ensembles	185.00	497.00	8.40	582.00	912.00
610510	Men's cotton shirts (knit)	168.00	68.00	100.00	3,000.00	128.00
9404XX	Bedding articles (stuffed)	153.00	67.00	95.00	4,100.00	234.00
611090	Knitted jerseys & pullovers (n.e.s.)	151.00	184.00	28.00	756.00	351.00
610711	Men's cotton undergarments	143.00	71.00	85.00	2,700.00	109.00
610462	Women's cotton trousers (knit)	137.00	143.00	16.00	4,900.00	187.00
100640	Broken rice	132.00	12.00	120.00	535.00	429.00
80450	Tropical fruits	131.00	39.00	97.00	1,500.00	115.00
630232	Bedlinen (man-made fibres, n.e.s.)	119.00	155.00	16.00	572.00	215.00
610590	Men's knitted shirts	93.00	113.00	9.40	295.00	221.00
640399	Footwear (n.e.s.)	89.00	73.00	38.00	18,000.00	91.00
03XXXX	Aquatic invertebrates (n.e.s.)	88.00	0.97	87.00	4,400.00	99.00
3907Xb	PET (polyethylene terephthalate)	88.00	52.00	41.00	5,700.00	189.00
520812	Cotton plain woven fabric	78.00	112.00	3.60	311.00	199.00
30XXXX	Medicaments (retail)	75.00	4.70	71.00	206,000.00	180.00
0805XX	Citrus fruits	73.00	0.00	61.00	3,600.00	133.00
620349	Men's trousers (n.e.s.)	72.00	78.00	13.00	852.00	122.00
100590	Maize	71.00	0.12	70.00	9,700.00	253.00
630790	Textile made-up articles	70.00	30.00	44.00	8,400.00	70.00
611596	Stockings (synthetic)	70.00	17.00	53.00	1,400.00	84.00
611120	Babies garments	69.00	50.00	28.00	3,400.00	66.00
120740	Sesame seeds	66.00	25.00	42.00	444.00	283.00
740319	Refined copper	66.00	0.10	66.00	439.00	580.00
630900	Used textile articles	65.00	12.00	55.00	1,200.00	215.00
630629	Tents	64.00	7.40	57.00	155.00	80.00

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	Europe Imports (mn)	Pakistan Exports (mn)
611030	Knitted jerseys (man-made fibres)	63.00	97.00	6.00	13,000.00	118.00
610339	Knitted men's jackets	62.00	56.00	11.00	123.00	114.00
610120	Men's cotton overcoats	58.00	33.00	24.00	758.00	69.00
610343	Men's synthetic trousers (knit)	56.00	52.00	11.00	1,500.00	72.00

Source: ITC

4.2.6 Pakistan's Export Potential in the Afghan Market

Food and agricultural commodities account for the largest share of unrealized export potential. Products such as semi-milled rice, broken rice, potatoes, mandarin and citrus hybrids, citrus fruits (n.e.s.), guavas, mangoes and mangosteens, sesame seeds, and glucose syrup show measurable gaps between estimated export potential and current export levels.

In textiles and apparel-related goods, limited but relevant opportunities are observed in polyester woven fabrics, dyed polyester fabrics, jerseys and pullovers, women's ensembles, women's tracksuits, tents, and used textiles, where current export performance remains below estimated capacity. These products reflect demand for low-cost, essential consumer textiles within the Afghan market structure.

In industrial and essential non-food items, unrealized potential is visible in wooden fibreboard, polyethylene terephthalate (PET), medicaments, soap, chewing gum, and hormone-based pharmaceutical products, indicating demand for basic industrial inputs and essential consumer goods.

Table 4.6 Pakistan's Export Potential in the Afghan Market

HS Code	Product Description	Export Potential (\$ in millions)	Baseline Exports (\$ in millions)	Unrealized Potential (\$ in millions)	Afghanistan Imports (\$ in millions)	Pakistan Exports (\$ in millions)	Avg Tariff (Afghanistan → Pakistan)
100630	Semi-milled or wholly milled rice	220.00	188.00	33.00	191.00	2,200.00	0.03
0805XX	Mandarins & citrus hybrids	42.00	25.00	18.00	26.00	133.00	—
100640	Broken rice	67.00	53.00	14.00	53.00	429.00	0.03
70190	Potatoes, fresh	50.00	44.00	6.30	64.00	158.00	0.20
80590	Citrus fruit n.e.s.	13.00	6.60	5.90	6.60	6.60	0.12
80450	Guavas, mangoes & mangosteens	11.00	6.20	5.00	6.30	115.00	0.11
551511	Polyester woven fabrics	2.50	0.00	2.50	75.00	11.00	0.03
620423	Women's ensembles	2.20	0.00	2.20	11.00	5.40	0.08
611090	Jerseys & pullovers n.e.s.	2.20	0.00	2.20	1.70	351.00	0.08
551219	Polyester woven fabrics dyed	2.00	0.00	2.00	25.00	28.00	0.03
621143	Women's tracksuits	1.50	0.00	1.50	22.00	25.00	0.08
630629	Tents n.e.s.	4.80	3.50	1.30	3.80	80.00	0.08
300339	Medicaments (hormones/steroids)	11.00	9.90	1.00	10.00	15.00	0.03
441193	Wooden fiberboard	22.00	21.00	0.98	21.00	22.00	0.05
170410	Chewing gum	9.30	8.40	0.83	13.00	35.00	0.05
630900	Used textiles	2.50	1.80	0.74	2.60	215.00	0.03
120740	Sesame seeds	2.90	2.30	0.63	2.30	283.00	0.03
170230	Glucose syrup (<20%)	4.70	4.10	0.61	5.90	65.00	0.08
340120	Soap (liquid/granules)	1.90	1.60	0.30	14.00	11.00	0.05
3907Xb	Polyethylene terephthalate	12.00	12.00	0.12	12.00	189.00	—

Source: ITC

4.2.7 Pakistan's Export Potential in the Bangladesh Market

The Bangladesh market presents a textiles-intensive and structurally concentrated set of unrealized export opportunities for Pakistan, alongside selective potential in agriculture and light industrial products.

Textiles and apparel dominate the pattern of export potential. A wide range of products, including woven cotton fabrics (dyed, bleached, unbleached, twill and printed variants), MMF blended fabrics, polyester-cotton fabrics, cotton yarn (combed and cabled), knit cotton fabrics, and related fabric-based textile products, exhibit persistent gaps between estimated potential and current export levels.

In agricultural and food products, additional opportunities are observed in semi/wholly milled rice, maize, onions and shallots, citrus fruits, frozen fish, and nuts, reflecting potential for strengthening Pakistan's position in staple food commodities and agro-based exports, supported by consistent import demand in Bangladesh.

Moderate unrealised potential is also evident in selected industrial and allied products, including cement clinkers, PET (primary forms), polystyrene, inflatable balls, and leather (HS 410792), indicating opportunities in construction inputs, synthetic materials, sports goods, and light manufacturing segments.

Table 4.7 Pakistan's Export Potential in the Bangladeshi Market

HS Code	Product Description	Export Potential (USD mn)	Baseline Exports (USD mn)	Unrealized Potential (USD mn)	Bangladesh Imports (USD mn)	Pakistan Exports (USD mn)	Tariff (%)
520932	Woven cotton (dyed, twill)	70.00	67.00	3.40	215.00	130.00	5.00
252310	Cement clinkers	48.00	47.00	0.73	651.00	122.00	25.00
520912	Woven cotton (unbleached twill)	16.00	12.00	3.50	64.00	74.00	5.00
100630	Semi/wholly milled rice	15.00	0.95	14.00	272.00	2,200.00	25.00
520939	Woven cotton dyed (n.e.s.)	11.00	6.80	3.90	194.00	37.00	5.00
520922	Woven cotton (bleached)	11.00	11.00	0.22	37.00	29.00	25.00
100590	Maize	9.80	4.80	5.00	356.00	253.00	0.00
521021	MMF blends (bleached)	9.70	0.67	9.00	15.00	75.00	5.00
521132	MMF blends (dyed twill)	8.60	6.70	1.90	98.00	15.00	5.00
70310	Onions & shallots	8.50	2.50	6.10	181.00	131.00	15.00
521031	MMF blends (dyed)	7.70	3.50	4.20	59.00	33.00	5.00
551321	Polyester-cotton fabrics (dyed)	5.90	0.25	5.70	49.00	34.00	25.00
520832	Cotton fabrics (dyed)	5.70	3.30	2.40	111.00	36.00	25.00
3907Xb	PET (primary forms)	5.50	0.20	5.30	187.00	189.00	-
551311	Polyester-cotton fabrics	5.50	0.76	4.70	58.00	42.00	25.00
520812	Cotton fabrics (unbleached)	5.50	4.20	1.30	26.00	199.00	25.00
600622	Knit cotton fabrics (dyed)	5.00	1.80	3.20	213.00	25.00	25.00
520822	Cotton fabrics (bleached)	4.90	0.34	4.60	28.00	50.00	25.00
521051	MMF blends (printed)	4.30	0.03	4.30	12.00	14.00	5.00
551341	Polyester-cotton (printed)	4.30	0.26	4.00	5.90	75.00	25.00
551422	Polyester-cotton twill (dyed)	4.30	2.30	1.90	67.00	23.00	25.00
0805XX	Citrus fruits	3.70	1.50	2.20	45.00	133.00	-
520919	Cotton fabrics (unbleached n.e.s.)	3.60	0.23	3.30	7.40	33.00	5.00
520522	Cotton yarn (combed)	3.60	2.20	1.40	191.00	42.00	3.00
950662	Inflatable balls	3.00	0.01	3.00	8.30	248.00	3.00
0303Xa	Frozen fish	2.80	0.43	2.40	58.00	105.00	-
521029	MMF blends (bleached)	2.80	2.00	0.75	11.00	11.00	5.00
520952	Cotton fabrics (printed twill)	2.80	2.60	0.21	12.00	5.10	5.00
520542	Cotton yarn (cabled combed)	2.70	1.60	1.10	30.00	15.00	3.00
410792	Leather (bovine/equine)	2.60	0.41	2.20	46.00	26.00	0.00
551412	Polyester-cotton twill	2.60	0.53	2.00	6.80	42.00	25.00

HS Code	Product Description	Export Potential (USD mn)	Baseline Exports (USD mn)	Unrealized Potential (USD mn)	Bangladesh Imports (USD mn)	Pakistan Exports (USD mn)	Tariff (%)
521139	MMF blends (dyed n.e.s.)	2.60	0.87	1.70	75.00	6.30	5.00
521112	MMF blends (unbleached twill)	2.30	0.20	2.10	5.70	14.00	5.00
521011	MMF blends (unbleached)	2.30	0.88	1.40	5.10	39.00	5.00
520929	Cotton fabrics (bleached n.e.s.)	2.20	0.94	1.30	16.00	9.20	25.00
0802Xd	Nuts (n.e.s.)	2.00	0.00	2.00	44.00	28.00	-
520852	Cotton fabrics (printed)	2.00	0.46	1.50	61.00	119.00	25.00
520813	Cotton fabrics (unbleached twill)	2.00	1.10	0.85	15.00	24.00	-
521120	MMF blends (bleached heavy)	1.90	0.64	1.20	19.00	3.80	5.00
390319	Polystyrene	1.90	1.00	0.82	44.00	64.00	5.00

Source: ITC

4.2.8 Pakistan's Export Potential in the Saudi Arabian Market

Food and agricultural commodities account for the largest share of unrealized export potential. Products such as semi-milled rice, sesame seeds, mandarins and citrus fruits, guavas and mangoes, cereal straw and husks, maize, potatoes, sweet biscuits, sugar confectionery, and frozen bovine carcasses exhibit consistent gaps between estimated export potential and current export performance.

Textiles and apparel constitute another significant area of unrealized potential. A wide range of products, including cotton bedlinen (knit and woven), cotton T-shirts and vests, men's and women's ensembles, knitted trousers and shirts, stockings, jerseys and pullovers, stuffed bedding articles, curtains, and textile cleaning cloths, show persistent underperformance relative to estimated export capacity.

In industrial and allied products, moderate unrealized potential is observed in polyethylene terephthalate (PET), medicaments, mineral boring machinery, disodium carbonate, natural barium sulphate, and other chemical and industrial inputs.

Table 4.8 Pakistan's Export Potential in the Saudi Arabian Market

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	Saudi Imports (\$ mn)	Pakistan Global Exports (\$ mn)	Tariff
100630	Semi-milled or wholly milled rice	227.00	145.00	82.00	1,500.00	2,200.00	---
620322	Men's ensembles of cotton	19.00	7.20	12.00	22.00	925.00	0.05
610910	T-shirts & vests of cotton (knit)	18.00	3.00	15.00	399.00	476.00	0.05
120740	Sesamum seeds	13.00	5.70	7.60	90.00	283.00	0.05
0805XX	Mandarins & similar citrus	11.00	7.50	3.10	70.00	139.00	---
121300	Cereal straw & husks	9.70	0.14	9.60	54.00	55.00	0.00
630231	Cotton bedlinen	9.60	2.20	7.40	20.00	1,200.00	0.12
611595	Cotton stockings	8.90	0.56	8.30	34.00	457.00	0.05
80450	Guavas, mangoes & mangosteens	8.80	6.40	2.40	76.00	117.00	0.00
210690	Food preparations (n.e.s.)	8.60	1.20	7.30	825.00	98.00	0.05
90XXXX	Medical instruments	8.20	2.20	6.00	620.00	428.00	---
630239	Bedlinen (n.e.s.)	6.50	3.10	3.50	7.30	498.00	0.12
9404XX	Stuffed bedding articles	6.30	4.20	2.10	171.00	234.00	---
610342	Men's knit cotton trousers	6.20	4.10	2.20	86.00	249.00	0.05
3907Xb	Polyethylene terephthalate	4.90	0.01	4.90	153.00	189.00	---
950662	Inflatable balls	4.80	0.84	4.00	16.00	249.00	0.05
30XXXX	Medicaments for retail	4.60	1.50	3.10	3,400.00	182.00	---
630210	Knit bedlinen	4.50	1.60	2.90	5.80	542.00	0.15
630391	Cotton curtains & valances	4.00	0.31	3.70	13.00	58.00	0.05

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	Saudi Imports (\$ mn)	Pakistan Global Exports (\$ mn)	Tariff
170490	Sugar confectionery	3.90	0.99	2.90	202.00	55.00	0.08
100590	Maize	3.80	0.21	3.60	1,100.00	254.00	0.00
843049	Mineral boring machinery	3.80	0.00	3.80	511.00	6.60	0.05
630710	Textile cleaning cloths	3.70	1.80	2.00	18.00	360.00	0.05
20210	Frozen bovine carcasses	3.70	0.09	3.60	19.00	10.00	0.05
190531	Sweet biscuits	3.50	1.60	1.90	189.00	34.00	0.10
611020	Cotton jerseys/pullovers	3.30	2.70	0.69	130.00	727.00	0.05
70190	Potatoes (fresh)	3.00	2.10	0.84	28.00	161.00	0.15
620349	Men's trousers (n.e.s.)	2.80	1.70	1.10	23.00	123.00	0.05
283620	Disodium carbonate	2.70	2.10	0.55	88.00	37.00	0.06
610590	Men's knit shirts (n.e.s.)	2.70	1.10	1.50	6.70	222.00	0.05
251110	Natural barium sulphate	2.70	1.10	1.70	101.00	12.00	0.05
610349	Men's knit trousers (n.e.s.)	2.50	1.20	1.30	8.80	217.00	0.05
100620	Husked/brown rice	2.40	1.20	1.20	14.00	365.00	0.00
611120	Babies cotton garments	2.30	0.56	1.70	108.00	67.00	0.05
620329	Men's ensembles (n.e.s.)	2.30	0.47	1.90	33.00	20.00	0.05
610711	Men's cotton briefs	2.30	0.17	2.10	58.00	109.00	0.05

Source: ITC

4.2.9 Pakistan's Export Potential in the Indonesian Market

Industrial raw materials and intermediate inputs constitute a significant share of unrealized export potential. Products such as chromium ores, talc/steatite, PET (primary forms), fluorspar, phosphates, aluminium alloys, iron/steel waste, and disodium carbonate exhibit notable gaps between estimated potential and current export levels.

Agricultural and food-related products also demonstrate meaningful export potential. Key items such as broken rice, maize, citrus fruits, onions and shallots, dates, sesame seeds, potatoes, glucose syrup, guar gum, fish meal, sugar confectionery, and frozen crabs highlight consistent unrealized demand.

Textiles and apparel represent another important area of opportunity. Products including cotton T-shirts, men's and women's cotton trousers, denim fabrics, knitted fabrics, cotton yarn, printed and unbleached cotton fabrics, bedlinen, terry towels, and textile-related made-ups show demand.

In addition, selected consumer and light industrial goods such as inflatable balls, gelatin, leather splits, polystyrene, and printed paper products reflect smaller but notable unrealized export space, suggesting niche opportunities in value-added manufacturing segments.

Table 4.9 Pakistan's Export Potential in the Indonesian Market

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	Indonesia Imports (mn)	Pakistan Exports (mn)	Tariff
90XXXX	Medical instruments	12.00	2.60	9.10	370.00	428.00	-
261000	Chromium ores	9.40	0.30	9.10	195.00	116.00	0.05
70310	Onions & shallots	8.90	0.00	8.90	68.00	134.00	0.06
100640	Broken rice	41.00	32.00	8.30	185.00	427.00	0.00
521142	Denim (mixed fibres)	1.40	0.61	0.78	19.00	111.00	0.00
252620	Talc/steatite	7.40	0.02	7.40	28.00	60.00	0.05
170230	Glucose syrup	7.20	0.00	7.20	108.00	65.00	0.05
0805XX	Citrus fruits	23.00	16.00	7.10	153.00	139.00	-
261900	Iron/steel waste	1.80	1.10	0.68	28.00	8.00	0.00

HS Code	Product	Export Potential (mn)	Baseline Exports (mn)	Unrealized Potential (mn)	Indonesia Imports (mn)	Pakistan Exports (mn)	Tariff
251020	Phosphates	1.50	0.85	0.68	206.00	3.00	0.00
3907Xb	PET (primary form)	6.90	0.00	6.90	342.00	189.00	-
630260	Terry towels/linen	6.60	0.01	6.60	27.00	1,100.00	0.00
110812	Maize starch	5.90	0.07	5.90	87.00	24.00	0.10
252921	Fluorspar	6.10	1.00	5.10	29.00	17.00	0.00
520512	Cotton yarn	1.90	1.50	0.45	13.00	505.00	0.00
80410	Dates	5.10	0.21	4.90	80.00	43.00	0.00
250100	Salt	4.90	0.01	4.90	71.00	79.00	0.08
120740	Sesamum seeds	5.10	0.45	4.60	21.00	283.00	0.05
70190	Potatoes	4.50	0.00	4.50	30.00	161.00	0.20
283620	Disodium carbonate	4.60	1.30	3.30	232.00	37.00	0.00
760120	Aluminium alloys	2.90	0.17	2.70	425.00	69.00	0.00
210690	Food preparations	2.50	0.00	2.50	675.00	98.00	0.43
420329	Leather gloves	2.70	0.37	2.30	6.80	312.00	0.05
600622	Knit cotton fabric	2.40	0.09	2.30	315.00	26.00	0.15
600690	Knit fabrics (other)	2.30	0.03	2.30	80.00	14.00	0.05
130232	Guar gum/thickeners	2.30	0.25	2.10	17.00	44.00	0.05
520819	Cotton fabric (unbleached)	2.00	0.04	2.00	26.00	79.00	0.10
630231	Bedlinen (cotton)	2.00	0.04	2.00	3.90	1,200.00	0.09
100590	Maize	1.80	1.70	0.11	338.00	254.00	0.05
610910	Cotton T-shirts	3.00	1.10	1.90	57.00	476.00	0.05
551341	Printed woven fabric	1.90	0.01	1.90	4.10	75.00	0.10
520942	Denim (≥85% cotton)	6.30	4.50	1.80	21.00	468.00	0.00
350300	Gelatin	1.80	0.00	1.80	45.00	19.00	0.05
950662	Inflatable balls	2.10	0.47	1.70	10.00	249.00	0.15
170490	Sugar confectionery	1.70	0.00	1.70	118.00	55.00	0.19
620342	Men's cotton trousers	3.30	1.70	1.60	30.00	1,400.00	0.13
520919	Cotton fabric (heavy)	1.60	0.08	1.50	12.00	33.00	0.10
30614	Crabs, frozen	1.50	0.02	1.50	68.00	22.00	0.05
620462	Women's cotton trousers	2.20	0.91	1.30	27.00	788.00	0.00
230120	Fish meal	1.40	0.10	1.30	42.00	45.00	0.00
410792	Bovine leather splits	2.20	1.10	1.20	54.00	26.00	0.00
520511	Cotton yarn (coarse)	1.50	0.27	1.20	4.20	216.00	0.00
390319	Polystyrene	1.30	0.10	1.20	94.00	64.00	0.10
481159	Printed paper	1.60	0.53	1.10	174.00	46.00	0.05

Source: ITC

4.2.10 Pakistan's Export Potential in the Malaysian Market

Textiles and household textile products constitute the most prominent area of unrealized export potential. A wide range of items, including used textiles, cotton bedlinen (knit and woven variants), terry towels, men's and women's cotton trousers, knitted shirts and pullovers, stockings, gloves, cleaning cloths, curtains, and other bedding articles, exhibit persistent gaps between estimated export potential and current export performance.

Agricultural and food commodities represent another important area of opportunity. Products such as potatoes, citrus fruits (mandarins and related varieties), maize starch, sesame seeds, spices, brassicas, dates, glucose syrup, food preparations, salt, and frozen fish and sardines reflect consistent unrealized export potential.

Industrial and intermediate goods also show meaningful export space. Key products including refined copper, aluminium alloys, PET (primary forms), polystyrene, talc/steatite, sodium carbonate, and starter batteries indicate demand for raw materials and intermediate inputs

In addition, selected consumer and light manufactured goods such as inflatable balls, leather apparel, medicaments, and printed or synthetic textile products reflect smaller but relevant niche opportunities within the broader export structure.

Table 4.10 Pakistan's Export Potential in the Malaysian Market

HS Code	Product	Export Potential (\$ mn)	Baseline Exports (\$ mn)	Unrealized Potential (\$ mn)	Malaysia Imports (\$ mn)	Pakistan Exports (\$ mn)	Tariff (%)
630900	Used textiles	41.00	2.90	39.00	154.00	217.00	0.00
70190	Potatoes	26.00	13.00	13.00	89.00	161.00	0.00
630260	Terry towels	20.00	5.20	15.00	54.00	1,100.00	0.00
620342	Men's cotton trousers	17.00	1.40	16.00	158.00	1,400.00	0.00
630231	Cotton bedlinen	16.00	4.70	11.00	27.00	1,200.00	0.00
740319	Refined copper	16.00	0.01	16.00	29.00	581.00	0.00
0805XX	Citrus (mandarins etc.)	16.00	0.28	16.00	83.00	139.00	-
630239	Bedlinen (other)	13.00	4.60	8.80	19.00	498.00	0.00
90XXXX	Medical instruments	12.00	2.00	9.50	373.00	428.00	-
0303Xa	Frozen fish	9.50	9.20	0.25	189.00	105.00	-
610910	Cotton T-shirts	9.30	2.70	6.60	269.00	476.00	0.00
110812	Maize starch	8.30	0.67	7.60	111.00	24.00	0.00
03XXXX	Aquatic invertebrates	7.80	2.00	5.90	225.00	99.00	-
630210	Knit bedlinen	7.60	0.61	7.00	11.00	542.00	0.00
91091	Spice mixtures	7.50	0.46	7.10	17.00	71.00	0.00
390319	Polystyrene	7.40	0.04	7.30	133.00	64.00	0.00
611595	Cotton stockings	6.60	0.76	5.80	41.00	457.00	0.00
630710	Cleaning cloths	6.40	0.15	6.30	25.00	360.00	0.00
120740	Sesamum seeds	6.20	2.10	4.10	16.00	283.00	0.00
620462	Women's cotton trousers	5.50	0.87	4.70	98.00	788.00	0.00
6116	Gloves & mittens	5.40	0.89	4.50	49.00	286.00	0.00
210690	Food preparations	5.40	0.00	5.40	932.00	98.00	0.00
3907Xb	PET (primary forms)	5.30	0.02	5.30	190.00	189.00	-
950662	Inflatable balls	4.90	1.00	3.90	13.00	249.00	0.00
250100	Salt	4.40	2.00	2.40	40.00	79.00	0.00
0704XX	Brassicac	4.40	0.00	4.40	166.00	13.00	-
760120	Aluminium alloys	4.10	0.14	4.00	726.00	69.00	0.00
9404XX	Bedding articles	4.00	0.33	3.70	151.00	234.00	-
610590	Men's knit shirts	3.70	0.13	3.60	6.40	222.00	0.00
610342	Men's knit trousers	3.60	0.35	3.20	47.00	249.00	0.00
850710	Starter batteries	3.40	0.00	3.40	242.00	28.00	0.03
170230	Glucose syrup	3.30	0.00	3.30	38.00	65.00	0.00
30XXXX	Medicaments	3.10	0.53	2.50	1,300.00	182.00	-
80410	Dates	3.10	0.01	3.10	50.00	43.00	0.00
610510	Men's cotton shirts	2.90	0.51	2.40	36.00	128.00	0.00
610349	Men's knit trousers (other)	2.70	0.38	2.30	6.80	217.00	0.00
610990	Other T-shirts	2.70	0.37	2.40	111.00	204.00	0.00
252620	Talc/steatite	2.60	0.01	2.60	9.80	60.00	0.00
420310	Leather apparel	2.50	0.21	2.20	7.50	278.00	0.00
620349	Men's trousers (other)	2.40	0.50	1.90	23.00	123.00	0.00
630299	Linen (other)	2.30	0.48	1.80	6.30	64.00	0.00
611090	Jerseys/pullovers	2.20	0.35	1.80	7.60	354.00	0.00
30353	Sardines (frozen)	2.20	0.08	2.10	20.00	15.00	0.00
283620	Sodium carbonate	2.20	0.02	2.20	176.00	37.00	0.00

Source: ITC

ASSESSMENT OF EXPORT DIVERSIFICATION OPPORTUNITIES IN SELECTED INTERNATIONAL MARKETS



Chapter 5

ASSESSMENT OF EXPORT DIVERSIFICATION OPPORTUNITIES IN SELECTED INTERNATIONAL MARKETS

5.1 Analysis of Pakistan's Export Diversification Opportunities

This chapter examines export diversification opportunities using the Product Diversification Indicator (PDI) developed by the International Trade Centre (ITC) and implemented through ITC Trade Map and Export Potential Map tools. The PDI identifies potential new export products at the HS-6 digit level where competitive export activity is limited or absent but where entry may be feasible based on existing productive capabilities and global demand conditions.

The methodology is grounded in the product space framework, which explains diversification as a path-dependent process in which countries are more likely to enter products that are closely related to their current export structure. The approach combines product proximity, global demand patterns, and market feasibility to identify new export opportunities that are not yet part of the existing export basket.

Unlike traditional competitiveness analysis, this framework focuses on potential new export areas rather than current performance, highlighting products where entry could be feasible given international demand and comparative production linkages. These opportunities provide a basis for identifying areas of export expansion and structural diversification across selected markets.

5.2 Pakistan Export Diversification Opportunities with Key Export Partners

This section presents Pakistan's export diversification opportunities in selected key international markets using the Product Diversification Indicator (PDI) developed by the International Trade Centre (ITC).

The analysis identifies HS-6 level products that Pakistan does not currently export competitively but could feasibly develop based on product relatedness, existing production capabilities, and global demand patterns within the product space framework.

These results highlight potential new export products across key partner countries, indicating avenues for broadening Pakistan's export base and reducing concentration in existing export sectors.

5.2.1 Export Diversification Opportunities in the USA Market

The USA import structure for selected products reflects a highly diversified and large-scale demand environment, covering electronics, machinery, consumer goods, agricultural commodities, and processed food products. The market is characterized by strong import depth and participation from multiple global suppliers, indicating high competition but also differentiated demand segments across product categories.

High-value import categories include electronics such as mobile phones (8517XX) and portable computers (847130), automotive wiring sets (854430), and television reception apparatus (852872), where global supply is dominated by established manufacturing economies. In addition, significant import demand exists for upholstered furniture, footwear, ceramic products, and industrial goods, reflecting broad consumption and industrial requirements.

In agricultural and food-related products, imports such as fresh tomatoes, grapes, olive oil, cane sugar, shrimp, and processed seafood indicate sustained demand for both raw and value-added food items. These categories are supplied by a wide range of countries, suggesting relatively diversified sourcing patterns compared to high-technology segments.

Overall, the market structure reflects a combination of high demand intensity and strong international competition, with clear segmentation between technology-intensive goods dominated by major manufacturing economies and agricultural or processed food products supplied by a more diversified group of exporters. The presence of multiple sourcing countries across many product lines indicates selective diversification opportunities, particularly in processed food, light manufacturing, and value-added consumer goods, where differentiation and compliance capability are key determinants of market entry.

Table 5.1 Export Diversification Opportunities for Pakistan in the United States Market

HS Code	Product Description	US Imports (\$ in Millions)	US Tariff to Pakistan
8517XX	Mobile phones	56,000.00	-
847130	Portable computers (≤ 1 kg)	48,000.00	0.00
854430	Vehicle wiring sets	14,000.00	0.00
852872	Television reception apparatus (colour)	13,000.00	0.02
940161	Upholstered seats (wooden frames)	7,400.00	0.00
950510	Christmas articles	3,900.00	0.00
70200	Tomatoes, fresh	3,400.00	0.01
150810	Groundnut oil, crude	3,200.00	0.03
6907	Ceramic tiles & paving	2,200.00	0.07
732111	Gas cooking appliances	2,200.00	0.00
80610	Grapes, fresh	2,000.00	0.00
1605Xa	Shrimps & prawns, prepared/preserved	1,800.00	-
1509XX	Olive oil (virgin)	1,700.00	-
1701XX	Cane sugar, raw	1,500.00	-
670420	Wigs, false beards, eyebrows & lashes (human hair)	1,400.00	0.00
691010	Ceramic sanitary fixtures	1,400.00	0.00
160414	Tunas, prepared/preserved	1,200.00	0.09
731700	Nails of iron/steel	1,200.00	0.00
570242	Floor coverings (man-made textiles, piled)	1,000.00	0.00
640291	Footwear (ankle-high, rubber/plastic)	936.00	0.29
680293	Worked granite	743.00	0.00
482010	Notebooks, diaries & similar paper products	704.00	0.00
310530	Diammonium phosphate	652.00	0.00
5703Xb	Floor coverings (tufted, man-made textiles)	584.00	-
670419	False beards, eyebrows & lashes (synthetic)	565.00	0.00
200570	Olives, prepared/preserved	542.00	0.01
640340	Footwear with metal toecap	393.00	0.07
200820	Pineapples, prepared/preserved	377.00	0.00
610444	Women's dresses (artificial fibres, knit)	298.00	0.15
30611	Rock lobster & sea crawfish (frozen)	288.00	0.00
620311	Men's suits (wool/fine hair)	255.00	0.13
3103XX	Superphosphates	234.00	-
720260	Ferro-nickel	215.00	0.00
60312	Cut carnations & buds	149.00	0.00
0713Xa	Beans, dried & shelled, n.e.s.	147.00	-
640220	Footwear with upper straps	132.00	0.00
0802Xc	Macadamia nuts	131.00	-
680223	Granite & flat articles	123.00	0.00
620120	Men's overcoats (wool/fine hair)	119.00	0.15

HS Code	Product Description	US Imports (\$ in Millions)	US Tariff to Pakistan
151530	Castor oil & fractions	114.00	0.00
732391	Cast iron household articles	97.00	0.00
71340	Lentils, dried & shelled	77.00	0.00
71320	Chickpeas, dried & shelled	66.00	0.00
71331	Beans (Vigna mungo/radiata)	57.00	0.00
460212	Rattan plaiting articles	57.00	0.03
310390	Phosphatic fertilisers	54.00	0.00
0713Xb	Legumes, dried & shelled, n.e.s.	33.00	-
0908Xc	Cardamoms	28.00	-
570220	Floor coverings of coconut fibres	21.00	0.00
530710	Single yarn of textile bast fibres	3.50	0.00

Source: ITC

5.2.2 Export Diversification Opportunities for Pakistan in the Chinese Market

The Chinese market presents substantial export diversification opportunities for Pakistan across industrial raw materials, agro-based commodities, textiles, seafood products, and selected light manufacturing goods. China's large import demand indicates considerable space for new product entry in categories where Pakistan currently has limited or no significant export presence, particularly in industrial inputs and consumer-oriented products.

Industrial and intermediate goods constitute the most prominent area of opportunity, with high import demand for ferro-nickel, ferro-chromium, intermediate nickel products, rubber mixtures, vehicle wiring sets, reactive dyes, and chemical intermediates, reflecting China's extensive manufacturing base. Agro-based and food commodities also show strong diversification potential, including processed palm oil, sugar, groundnuts, legumes, edible oils, fruits, cardamoms, and seafood products such as lobster and shrimp, indicating sustained food and processing demand.

Textile and fibre-based products, including silk scarves, bast fibre yarn, cotton yarn, knitted fabrics, textile floor coverings, and selected wool garments, represent additional opportunities within both industrial and consumer segments. Selected light manufacturing and consumer goods such as loudspeakers, ceramic tiles, sanitary ware, bicycle parts, and footwear further indicate niche diversification potential.

Overall, the Chinese market reflects a highly diversified import structure with strong opportunities concentrated in industrial materials, agro-based commodities, textiles, and selected consumer goods, suggesting considerable scope for export diversification where demand conditions and product feasibility align.

Table 5.2 Export Diversification Opportunities for Pakistan in the Chinese Market

HS Code	Product	China Imports (\$ in Millions)	Tariff (%)
720260	Ferro-nickel	1,400.00	0.00
400280	Rubber mixtures	5,200.00	0.00
151190	Processed palm oil	4,400.00	0.07
500100	Silkworm cocoons	4,100.00	0.03
750120	Intermediate nickel products	4,000.00	0.00
720241	Ferro-chromium	3,400.00	0.00
1701XX	Raw cane sugar	1,900.00	-
8517XX	Mobile phones	1,600.00	-
1202	Groundnuts (raw)	732.00	0.00
0306Xb	Rock lobster & sea crawfish	691.00	-
854430	Vehicle wiring sets	671.00	0.06
151530	Castor oil	504.00	0.10
150810	Groundnut oil (crude)	466.00	0.10
71331	Beans (Vigna mungo/radiata)	445.00	0.00

HS Code	Product	China Imports (\$ in Millions)	Tariff (%)
80610	Fresh grapes	372.00	0.02
851829	Loudspeakers	322.00	0.00
170199	Refined sugar	315.00	0.50
400700	Rubber thread/cord	282.00	0.11
0802Xc	Macadamia nuts	260.00	-
4402XX	Wood charcoal	149.00	-
30611	Frozen rock lobster	114.00	0.02
670420	Wigs (human hair)	113.00	0.06
6907	Ceramic tiles	112.00	0.04
0713Xb	Dried legumes, n.e.s.	107.00	-
80540	Grapefruit	98.00	0.00
320416	Reactive dyes	95.00	0.00
30343	Skipjack/bonito (frozen)	88.00	0.02
530710	Bast fibre yarn	82.00	0.00
871491	Bicycle parts	78.00	0.02
621410	Silk scarves	76.00	0.06
0908Xc	Cardamoms	66.00	-
620120	Men's wool overcoats	66.00	0.06
691010	Ceramic sanitary ware	64.00	0.00
640291	Ankle-high footwear	44.00	0.10
200820	Preserved pineapples	42.00	0.05
230500	Groundnut oilcake	39.00	0.00
292142	Aniline derivatives	39.00	0.00
0713Xa	Beans, n.e.s.	33.00	-
71333	Kidney beans	29.00	0.00
620311	Men's wool suits	29.00	0.08
1605Xa	Prepared shrimp/prawns	27.00	-
530720	Cabled bast yarn	22.00	0.00
71320	Chickpeas	19.00	0.00
71340	Lentils	18.00	0.00
520614	Cotton yarn (<85%)	16.00	0.04
570242	Textile floor coverings	15.00	0.00
600121	Knitted cotton piles	13.00	0.00
482010	Paper notebooks	8.30	0.05
530390	Jute fibres (processed)	5.90	0.00
570220	Coconut fibre floor coverings	0.69	0.00

Source: ITC

5.2.3 Export Diversification Opportunities for Pakistan in the United Kingdom Market

The UK market presents a diversified range of export diversification opportunities for Pakistan across consumer electronics, light manufacturing, agro-based commodities, processed foods, and textile-related products. The scale of UK imports highlights substantial space for new product entry in categories where Pakistan currently has limited or no significant export presence, particularly in consumer goods and industrial products.

Light manufacturing and consumer goods represent the most prominent area of opportunity, with strong import demand for mobile phones, television reception apparatus, vehicle wiring sets, ceramic tiles, sanitary fixtures, footwear, notebooks, and wigs or hair products. These categories reflect sustained consumer and industrial demand within the UK market.

Agro-based and food commodities also exhibit meaningful diversification potential. Products such as fresh grapes, kidney beans, lentils, legumes, cardamoms, cinnamon, raw cane sugar, and prepared seafood products including tuna, shrimps, and prawns indicate opportunities linked to food consumption and processed food demand.

Textile and household-related products, including tufted and piled floor coverings, coconut fibre floor coverings, women's dresses, and men's wool suits, suggest additional opportunities in specialized consumer segments. Industrial raw materials such as nickel intermediate products and ferro-nickel further indicate limited but relevant opportunities in manufacturing-linked imports.

Table 5.3 Export Diversification Opportunities for Pakistan in the United Kingdom Market

HS Code	Product Description	UK Imports (\$ mn)	UK Avg Tariff to Pakistan (%)
8517XX	Mobile phones	8,700	–
852872	TV reception apparatus	1,900	0
854430	Vehicle wiring sets	1,300	0
6907	Ceramic tiles	677	0
80610	Grapes (fresh)	640	2.67
5703Xb	Floor coverings (tufted)	513	–
160414	Tunas, prepared/preserved	483	0
950510	Christmas articles	375	0
1605Xa	Shrimps & prawns, prepared	326	–
1701XX	Cane sugar, raw	303	–
691010	Ceramic sanitary fixtures	240	0
750120	Nickel intermediate products	206	0
482010	Notebooks & similar paper products	179	0
640340	Safety footwear (metal toe cap)	164	0
640291	Footwear (ankle-high)	154	0
670420	Wigs & human hair products	97	0
570242	Floor coverings (piled)	95	0
71333	Kidney beans	90	0
720260	Ferro-nickel	90	0
610444	Women's dresses	89	0
4402XX	Wood charcoal	55	–
670419	Synthetic false hair products	48	0
620311	Men's wool suits	47	0
71340	Lentils, dried	37	0
640220	Footwear (with straps)	27	0
71331	Beans (Vigna)	18	0
151530	Castor oil & fractions	15	0
0908Xc	Cardamoms	14	–
0713Xb	Legumes, dried (n.e.s.)	7.7	–
570220	Floor coverings (coconut fibre)	6.2	0
90611	Cinnamon (fresh)	4.3	0

Source: ITC

5.2.4 Export Diversification Opportunities for Pakistan in the United Arab Emirates Market

The UAE market presents a diversified range of export diversification opportunities for Pakistan across consumer electronics, industrial materials, food products, construction-related goods, and selected textile and consumer items. The scale of UAE imports highlights considerable scope for new product entry in categories where Pakistan currently has limited or no significant export presence, supported by the country's role as both a consumption and regional re-export hub.

Industrial and construction-related goods constitute a major area of opportunity, with strong import demand for vessels, steel coils, iron and steel bars, welded steel tubes, coaxial cables, ceramic tiles, sanitary fixtures, granite products, and phosphatic fertilizers. These categories reflect sustained infrastructure and industrial demand within the UAE economy.

Agro-based and food commodities also exhibit substantial diversification potential. Products such as processed palm oil, raw and refined sugar, lentils, chickpeas, beans, fresh grapes, tomatoes, cardamoms, castor oil, preserved pineapple, tuna, and prepared shrimp and prawn products indicate stable consumer and food-processing demand.

Textile and consumer-oriented goods represent an additional area of opportunity, including floor coverings, silk scarves, wool garments, women's dresses, footwear, wigs and hair products, notebooks, and household consumer items. These products reflect niche and premium consumer demand within the UAE's diversified retail market.

Table 5.4 Export Diversification Opportunities for Pakistan in the United Arab Emirates Market

HS Code	Product	UAE Imports (\$ in Millions)	Average Tariff to Pakistan
8517XX	Mobile phones	21,000.00	—
890690	Vessels (n.e.s.)	1,000.00	0.00
852872	Colour television reception apparatus	790.00	0.05
1701XX	Cane sugar, raw	708.00	—
890400	Tugs & pusher craft	676.00	0.00
720839	Hot-rolled flat iron/steel coils (<3mm)	664.00	0.05
890590	Light-vessels & floating cranes	624.00	0.00
151190	Processed palm oil	507.00	0.05
6907	Ceramic tiles & paving tiles	337.00	0.05
854420	Coaxial cable & conductors	309.00	0.05
721420	Deformed iron/steel bars & rods	289.00	0.10
71340	Lentils, dried & shelled	270.00	0.05
0908Xc	Cardamoms	166.00	—
170199	Refined cane/beet sugar	160.00	0.00
730630	Welded circular steel tubes	151.00	0.05
691010	Ceramic sanitary fixtures	132.00	0.05
160414	Tunas, prepared/preserved	118.00	0.05
71320	Chickpeas, dried & shelled	115.00	0.05
80610	Fresh grapes	97.00	0.00
70200	Fresh tomatoes	92.00	0.00
570242	Floor coverings of man-made textiles	88.00	0.05
292142	Aniline derivatives	85.00	0.05
732111	Gas cooking appliances	76.00	0.05
640220	Footwear with rubber/plastic soles & uppers	71.00	0.05
640340	Safety footwear with metal toe-cap	55.00	0.05
71331	Beans (Vigna mungo/radiata)	54.00	0.03
0713Xb	Legumes, dried & shelled (n.e.s.)	48.00	—
5703Xb	Tufted floor coverings of man-made textiles	42.00	—
680223	Granite & flat articles	37.00	0.05
640291	Ankle-high rubber/plastic footwear	31.00	0.05
482010	Notebooks, diaries & account books	29.00	0.05
4402XX	Wood charcoal	29.00	—
621410	Silk scarves & veils	27.00	0.05
71333	Kidney beans (Phaseolus vulgaris)	22.00	0.03
200820	Pineapples, prepared/preserved	20.00	0.05
620311	Men's suits of wool/fine animal hair	20.00	0.05
560749	Polyethylene/polypropylene cordage & cables	19.00	0.05
620610	Women's silk blouses & shirts	17.00	0.05
721041	Corrugated zinc-plated iron/steel sheets	17.00	0.05
610444	Women's dresses of artificial fibres	14.00	0.05
620120	Men's wool overcoats & anoraks	12.00	0.05
670420	Wigs & hair products of human hair	11.00	0.05

HS Code	Product	UAE Imports (\$ in Millions)	Average Tariff to Pakistan
1605Xa	Prepared/preserved shrimps & prawns	9.20	—
151530	Castor oil & fractions	8.50	0.05
610829	Women's briefs & panties	7.60	0.05
670419	Synthetic false beards/eyebrows/eyelashes	5.70	0.05
310390	Phosphatic fertilizers	3.20	0.05
530710	Single yarn of textile bast fibres	1.10	0.05
530720	Cabled yarn of textile bast fibres	0.66	0.05
570220	Coconut fibre floor coverings	0.63	0.05

Source: ITC

5.2.5 Export Diversification Opportunities for Pakistan in the EU Market

The European market presents a broad and diversified range of export diversification opportunities for Pakistan across electronics, industrial inputs, processed foods, textiles, consumer goods, and selected agricultural commodities.

Electronics and industrial manufactures constitute a major area of diversification potential. High import demand for mobile phones, vehicle ignition wiring sets, television reception apparatus, monitors, bicycle parts, ferro-nickel, ceramic tiles, sanitary fixtures, gas cooking appliances, diammonium phosphate, and cast iron household products indicate opportunities for Pakistan to strengthen participation in industrial and engineering-related exports. Construction-related materials such as ceramic products, granite, and floor coverings further reflect demand linked to housing and infrastructure markets.

Food and agro-based commodities also present meaningful opportunities. Products including fresh grapes, groundnuts, lentils, kidney beans, cardamoms, cinnamon, raw cane sugar, castor oil, crude groundnut oil, prepared tuna, shrimps, pineapples, rock lobster, and frozen yellowfin tuna suggest growing demand for processed food, fisheries, and niche agricultural products in Europe's consumer market.

Consumer and light manufacturing goods represent an additional avenue for diversification, including footwear, notebooks, umbrellas, wigs and synthetic cosmetic products, festive articles, women's garments, household floor coverings, and textile yarn products. These categories indicate scope for Pakistan to diversify into medium-value consumer goods with established demand in European markets.

Table 5.5 Export Diversification Opportunities for Pakistan in the EU Market

HS Code	Product Description	Europe Imports (USD mn)
8517XX	Mobile phones	86,000
854430	Ignition wiring sets for vehicles	20,000
852872	Color television reception apparatus	17,000
8528Xb	Monitors (not elsewhere specified)	16,000
6907	Ceramic flags, paving, hearth and wall tiles	7,400
80610	Fresh grapes	4,600
160414	Prepared or preserved tuna	4,400
640291	Ankle-high footwear with rubber/plastic soles and uppers	3,200
871491	Bicycle frames and forks	2,200
691010	Ceramic sanitary fixtures of porcelain	2,200
950510	Christmas festive articles	2,100
1605Xa	Prepared or preserved shrimps and prawns	1,900
1202	Unroasted groundnuts	1,800
732111	Gas-powered cooking appliances	1,600
5703Xb	Tufted floor coverings of man-made textile materials (n.e.s.)	1,500
1701XX	Raw cane sugar	1,400
640340	Footwear with metal toe cap (rubber/plastic/leather soles)	1,400

HS Code	Product Description	Europe Imports (USD mn)
482010	Notebooks, diaries and similar paper products	1,200
310530	Diammonium phosphate fertiliser	1,200
720260	Ferro-nickel	1,000
570242	Piled floor coverings of man-made textiles	1,000
610444	Knitted or crocheted women's dresses (artificial fibres)	1,000
680293	Worked granite	999
71333	Dried and shelled kidney beans (<i>Phaseolus vulgaris</i>)	710
4402XX	Wood charcoal	635
620311	Men's suits of wool or fine animal hair	496
200820	Prepared or preserved pineapples	475
640220	Footwear with upper straps (rubber/plastic soles)	426
151530	Castor oil and fractions thereof	398
71340	Dried and shelled lentils	397
60312	Cut carnations and flower buds (fresh)	327
670420	Wigs, false beards, eyebrows and eyelashes (human hair)	323
660199	Umbrellas	265
750120	Intermediate products of nickel metallurgy	247
30342	Frozen yellowfin tuna	241
670419	False beards, eyebrows and eyelashes (synthetic fibres)	201
30611	Frozen rock lobster and sea crawfish	156
0802Xc	Macadamia nuts	143
460212	Articles of rattan plaiting materials	110
732391	Cast iron household articles	110
150810	Crude groundnut oil	103
0713Xa	Dried and shelled beans (n.e.s.)	88
610829	Knitted or crocheted women's briefs and panties	82
0908Xc	Cardamoms	74
71331	Dried and shelled beans (<i>Vigna mungo/radiata</i>)	67
0713Xb	Dried and shelled legumes (n.e.s.)	57
90611	Fresh cinnamon (<i>Cinnamomum zeylanicum</i>)	39
530720	Cabled yarn of textile bast fibres	32
530710	Single yarn of textile bast fibres	30
570220	Floor coverings of coconut fibres	24

Source: ITC

5.2.6 Export Diversification Opportunities for Pakistan in the Afghan Market

Food and agro-based commodities represent the most prominent area of diversification opportunity. Strong import demand for wheat flour, processed palm oil, sugar, fresh tomatoes, groundnuts, lentils, kidney beans, green tea, cardamoms, cinnamon, prepared olives, preserved tuna, and pineapple products reflects sustained demand for staple food and processed agricultural products.

Construction materials and industrial goods also show meaningful diversification potential. Products such as iron and steel bars, flat-rolled steel coils, welded steel tubes, ceramic tiles, sanitary fixtures, aluminium wire, reactive dyes, and diammonium phosphate indicate opportunities linked to reconstruction, infrastructure, and basic industrial activity within the Afghan economy.

Consumer and light manufacturing goods constitute an additional area of opportunity, including mobile phones, portable computers, television reception apparatus, floor coverings, notebooks, washing machines, gas cooking appliances, footwear, household articles, and synthetic textile products. Smaller niche opportunities are also evident in scarves, mats, bicycle parts, and cosmetic-related products such as synthetic hair items.

Table 5.6 Export Diversification Opportunities for Pakistan in the Afghan Market

HS Code	Product Description	Afghanistan Imports (\$ in millions)	Afghanistan Avg Applied Tariff to Pakistan
110100	Wheat or meslin flour	654.00	0.05
151190	Palm oil & fractions, processed	285.00	0.03
8517XX	Mobile phones	189.00	-
170199	Cane/beet sugar & chemically pure sucrose	148.00	0.03
721420	Bars & rods of iron/steel, deformed	60.00	0.05
8541Xa	Photosensitive semiconductor devices	47.00	-
70200	Tomatoes, fresh	43.00	0.20
570292	Floor coverings of man-made textiles, flat weave, made up	41.00	0.25
720839	Flat-rolled iron/steel coils	16.00	0.05
847130	Portable computers ≤1kg	15.00	0.03
570242	Floor coverings of man-made textiles, piled, made up	11.00	0.25
6907	Ceramic flags & paving, hearth/wall tiles	11.00	0.08
0908Xc	Cardamoms	9.30	-
1202	Groundnuts, not roasted	8.40	0.03
540720	Wovens of strip & similar, synthetic	7.90	0.03
852872	TV reception apparatus, colour	7.70	0.08
90220	Green tea, packings >3kg	7.00	0.03
310530	Diammonium phosphate	5.20	0.03
1701XX	Cane sugar, raw	4.80	-
160414	Tunas, prepared/preserved	3.20	0.08
691010	Ceramic sanitary fixtures, of porcelain	3.10	0.05
71340	Lentils, dried & shelled	2.30	0.05
482010	Notebooks, account books, diaries & similar	2.10	0.03
731700	Iron/steel nails	2.10	0.05
320416	Synthetic organic reactive dyes	1.90	0.00
845012	Washing machines with centrifugal drier	1.50	0.08
550932	Cabled yarn, ≥85% acrylic staples	1.10	0.03
560749	Polyethylene/polypropylene cordage & cables	1.00	0.10
5703Xb	Floor coverings, tufted, n.e.s.	0.99	-
851629	Electric heating apparatus	0.81	0.08
71333	Kidney beans	0.78	0.05
732111	Gas cooking appliances	0.73	0.03
640220	Footwear, rubber/plastic soles & uppers, with upper straps	0.70	0.05
640291	Footwear, rubber/plastic soles & uppers, ankle-high	0.54	0.05
200570	Prepared olives	0.52	0.10
854430	Vehicle wiring sets	0.47	0.08
730630	Iron/steel tubes welded	0.47	0.03
761490	Aluminium stranded wire	0.42	0.08
610829	Women's briefs & panties	0.36	0.08
200820	Pineapples, prepared/preserved	0.21	0.05
1509XX	Virgin olive oil	0.17	-
680223	Granite articles	0.15	0.16
640340	Footwear with metal toe cap	0.13	0.05
621410	Silk scarves & veils	0.12	0.10
4402XX	Wood charcoal	0.08	-
871491	Bicycle frames & forks	0.08	0.05
732391	Cast iron household articles	0.04	0.05
670419	Synthetic false beards/eyelashes	0.03	0.12
460129	Mats & screens of vegetable materials	0.03	0.08
90611	Cinnamon (Cinnamomum zeylanicum Blume), fresh	0.02	0.03

Source: ITC

5.2.7 Export Diversification Opportunities for Pakistan in the Bangladesh Market

The structure of Bangladesh's import demand highlights meaningful scope for new product entry in categories where Pakistan currently has limited or no significant export presence, particularly in products linked to manufacturing and food processing activities.

Agro-based and food commodities constitute a major area of diversification opportunity. Strong import demand for processed palm oil, raw and refined sugar, lentils, beans, groundnuts, grapes, tomatoes, cardamoms, cinnamon, and castor oil reflects sustained consumption and food-processing requirements within Bangladesh's growing economy.

Industrial and intermediate goods also show significant diversification potential. Products such as diammonium phosphate, superphosphates, steel coils, steel towers, steel bars, aluminium wire, nails, reactive dyes, rubber thread, sorbitol, and vehicle wiring indicate demand for manufacturing, agricultural, and infrastructure-related inputs.

Textile and fibre-based products represent another important area of opportunity, including narrow woven fabrics, knitted and dyed fabrics, acrylic yarn, mixed yarn, flax yarn, cotton yarn, loop and long pile fabrics, and floor coverings. These products reflect Bangladesh's strong industrial demand for textile intermediates linked to its export-oriented garment sector.

In addition, selected consumer and light manufacturing goods such as television receivers, ceramic fixtures, ceramic tiles, bicycle parts, footwear, notebooks, wigs, and safety glass indicate smaller but relevant niche opportunities within domestic consumption segments.

Table 5.7 Export Diversification Opportunities for Pakistan in the Bangladesh Market

HS Code	Product Description	Imports (\$ in millions)	Tariff (%)
151190	Palm oil	1,400.00	0.12
1701XX	Cane sugar, raw	842.00	–
310530	Diammonium phosphate	831.00	0.00
720839	Steel coils	567.00	0.10
3103XX	Superphosphates	373.00	–
71340	Lentils, dried & shelled	351.00	0.00
320416	Reactive dyes	284.00	0.03
761490	Aluminium wire	102.00	0.25
170199	Refined sugar	97.00	0.00
580620	Narrow woven fabrics	92.00	0.25
550932	Cabled acrylic yarn	90.00	0.03
80610	Grapes	79.00	0.25
730820	Steel towers	65.00	0.25
0908Xc	Cardamoms	59.00	–
600642	Knit fabrics (dyed)	59.00	0.25
521041	Plain wovens	47.00	0.05
852872	TV receivers	38.00	0.25
691010	Ceramic fixtures	35.00	0.25
400700	Rubber thread	33.00	0.03
6907	Ceramic tiles	32.00	0.25
521214	Wovens n.e.s.	27.00	0.05
761410	Aluminium wire core	27.00	0.25
871491	Bicycle parts	26.00	0.25
700719	Safety glass	25.00	0.05
530610	Single flax yarn	23.00	0.05
600121	Loop pile fabrics	23.00	0.25

HS Code	Product Description	Imports (\$ in millions)	Tariff (%)
600110	Long pile fabrics	21.00	0.25
71331	Beans (Vigna mungo/radiata)	15.00	0.00
1202	Groundnuts	15.00	0.03
731700	Nails	13.00	0.05
70200	Tomatoes	13.00	0.25
550951	Mixed yarn	10.00	0.10
721420	Steel bars	9.20	0.00
0713Xb	Legumes, dried & shelled, n.e.s.	8.90	–
570242	Floor coverings	6.10	0.25
854430	Vehicle wiring	5.00	0.03
382460	Sorbitol	4.60	0.03
90611	Cinnamon, fresh	3.80	0.25
520614	Single yarn (<85% cotton)	3.50	0.05
320120	Wattle extract	3.50	0.00
670420	Wigs (human hair)	2.90	0.05
670419	False hair (synthetic)	2.00	0.05
0713Xa	Beans n.e.s.	2.00	–
640220	Footwear (straps)	1.70	0.05
732310	Steel wool	1.70	0.05
640340	Safety footwear	1.50	0.05
482010	Notebooks	1.40	0.05
680223	Granite	1.10	0.05
640291	Footwear ankle-high	0.77	0.05
151530	Castor oil	0.63	0.03

Source: ITC

5.2.8 Export Diversification Opportunities for Pakistan in the Saudi Arabian Market

Food and agro-based commodities represent the most prominent area of diversification opportunity. Strong import demand for raw and refined sugar, processed palm oil, cardamoms, fresh tomatoes, grapes, peaches, olives, chickpeas, lentils, kidney beans, preserved tuna, olive oil, and prepared food products indicates sustained demand for staple and processed food items.

Construction and industrial-related goods also exhibit meaningful diversification potential. Products such as floating cranes, tugs, ceramic tiles, sanitary fixtures, steel towers, grinding balls, granite products, and gas cooking appliances reflect demand linked to construction, infrastructure, and industrial development activities.

Consumer and household goods constitute another area of opportunity, including upholstered furniture, floor coverings, footwear, washing machines, notebooks, travel sets, household iron articles, and selected apparel products. Textile-related inputs such as acrylic and bast fibre yarns also indicate niche opportunities within industrial and consumer segments.

Table 5.8 Export Diversification Opportunities for Pakistan in the Saudi Arabian Market

HS Code	Product	Saudi Arabia Imports (\$ in millions)	Average Tariff to Pakistan
1701XX	Cane sugar, raw	818.00	—
890590	Light-vessels & floating cranes	715.00	0.00
852872	Colour television reception apparatus	462.00	0.05
151190	Processed palm oil & fractions	434.00	0.12
6907	Ceramic tiles & paving tiles	406.00	0.09
940161	Upholstered seats (wooden frame)	313.00	0.15

HS Code	Product	Saudi Arabia Imports (\$ in millions)	Average Tariff to Pakistan
691010	Ceramic sanitary fixtures	219.00	0.12
570242	Floor coverings of man-made textiles, piled	205.00	0.15
0908Xc	Cardamoms	197.00	—
890400	Tugs & pusher craft	194.00	0.00
160414	Tunas, prepared/preserved	136.00	0.05
732111	Gas cooking appliances	123.00	0.06
70200	Fresh tomatoes	112.00	0.15
4402XX	Wood charcoal	106.00	—
1509XX	Virgin olive oil	105.00	—
80610	Fresh grapes	79.00	0.00
200570	Prepared/preserved olives	68.00	0.05
71320	Chickpeas, dried & shelled	65.00	0.05
71340	Lentils, dried & shelled	61.00	0.05
730820	Iron/steel towers & lattice masts	61.00	0.15
170199	Refined cane/beet sugar	55.00	0.00
640220	Footwear with rubber/plastic soles & uppers	53.00	0.05
640291	Footwear (ankle-high), rubber/plastic	38.00	0.05
640340	Safety footwear with metal toecap	38.00	0.05
680223	Granite & flat articles	37.00	0.10
5703Xb	Tufted floor coverings of man-made textiles	36.00	—
482010	Notebooks & diaries (paper/paperboard)	34.00	0.05
845012	Washing machines with centrifugal drier	33.00	0.05
80930	Fresh peaches & nectarines	30.00	0.00
960500	Travel sets	28.00	0.05
732310	Iron/steel wool	22.00	0.05
0713Xb	Legumes, dried & shelled (n.e.s.)	17.00	—
610444	Women's dresses of artificial fibres	15.00	0.05
71333	Kidney beans, dried	13.00	0.03
732591	Grinding balls for mills	10.00	0.05
550932	Cabled yarn of acrylic staple fibres	9.20	0.05
530720	Cabled yarn of textile bast fibres	8.50	0.05
200820	Prepared/preserved pineapples	7.60	0.05
610829	Women's briefs & panties	5.70	0.05
732391	Household articles of cast iron	5.70	0.05
71331	Beans (Vigna mungo/radiata), dried	5.30	0.03
0802Xc	Macadamia nuts	4.80	—
620120	Men's wool overcoats & anoraks	4.70	0.08
8517XX	Mobile phones	4.60	—
0713Xa	Beans, dried & shelled (n.e.s.)	2.10	—
620311	Men's suits of wool/fine animal hair	2.00	0.05
670419	False beards, eyebrows & eyelashes	1.90	0.05
151530	Castor oil & fractions	1.60	0.05
570220	Floor coverings of coconut fibres	0.70	0.10
530710	Single yarn of textile bast fibres	0.21	0.05

Source: ITC

5.2.9 Export Diversification Opportunities for Pakistan in the Indonesian Market

Agro-based and food commodities constitute a major area of diversification opportunity. Strong import demand for soybean oilcake, raw and refined sugar, groundnuts, grapes, legumes, chickpeas, kidney beans, and frozen seafood

products such as tuna, bonito, and swordfish reflects sustained demand linked to food consumption and agro-processing activities.

Industrial and intermediate goods also exhibit significant diversification potential. Products such as coated steel products, welded steel tubes, floating cranes, tugs, diammonium phosphate, phosphatic fertilizers, reactive dyes, ferro-chromium, vehicle wiring sets, diesel generators, and grinding balls indicate demand for industrial, manufacturing, and infrastructure-related inputs.

Textile and fibre-based products represent another important area of opportunity, including narrow woven fabrics, knitted fabrics, looped and long pile fabrics, bast fibre yarns, plastic cordage, and synthetic textile products. These categories reflect Indonesia's demand for industrial textile inputs and consumer-related textile goods.

In addition, selected consumer and light manufacturing goods such as mobile phones, colour televisions, ceramic tiles, sanitary fixtures, bicycle parts, footwear, washing machines, umbrellas, notebooks, household iron articles, and synthetic wigs indicate niche diversification opportunities within domestic consumption segments.

Table 5.9 Export Diversification Opportunities for Pakistan in the Indonesian Market

HS Code	Product	Indonesia Imports (\$ in millions)	Tariff
230400	Soybean oilcake	2,600.00	0.01
1701XX	Cane sugar, raw	2,300.00	-
8517XX	Mobile phones	2,200.00	-
1202	Groundnuts	369.00	0.05
80610	Grapes, fresh	299.00	0.00
6907	Ceramic tiles	294.00	0.19
721061	Flat-rolled steel (coated)	243.00	0.20
890590	Floating cranes/vessels	227.00	0.03
852872	Colour TVs	206.00	0.10
310530	Diammonium phosphate	167.00	0.00
170199	Sugar & sucrose	156.00	0.08
890400	Tugs & pusher craft	117.00	0.01
71331	Beans (Vigna mungo/radiata)	99.00	0.03
310390	Phosphatic fertilisers	93.00	0.00
3103XX	Superphosphates	80.00	-
730630	Steel tubes (welded)	76.00	0.09
854430	Vehicle wiring sets	68.00	0.10
320416	Reactive dyes	65.00	0.00
871491	Bicycle parts	64.00	0.10
640220	Footwear (upper straps)	62.00	0.30
580620	Narrow woven fabrics	52.00	0.10
700719	Safety glass	50.00	0.05
850212	Diesel generators	50.00	0.10
691010	Ceramic sanitary fixtures	46.00	0.20
560749	Cordage/cables (plastic)	41.00	0.05
600121	Looped cotton fabrics	36.00	0.15
845012	Washing machines	32.00	0.15
731700	Iron/steel nails	29.00	0.09
660199	Umbrellas	26.00	0.10
600642	Knit fabrics (artificial fibre)	24.00	0.15
30343	Skipjack/bonito (frozen)	21.00	0.05
482010	Notebooks & diaries	18.00	0.05
732591	Grinding balls	18.00	0.04
600110	Long pile fabrics	18.00	0.15

HS Code	Product	Indonesia Imports (\$ in millions)	Tariff
530720	Cabled yarn (bast fibres)	14.00	0.05
680293	Worked granite	14.00	0.10
732391	Cast iron household articles	8.50	0.15
30342	Tuna (yellowfin)	6.80	0.05
0713Xb	Legumes (n.e.s.)	5.50	-
640291	Footwear (ankle-high)	5.50	0.21
680223	Granite articles	4.90	0.10
0713Xa	Beans (n.e.s.)	4.10	-
151530	Castor oil	4.00	0.05
732310	Steel wool	3.30	0.15
30357	Swordfish (frozen)	3.20	0.05
670419	Synthetic wigs	2.70	0.15
530710	Single yarn (bast fibres)	2.30	0.05
71320	Chickpeas	1.40	0.03
720241	Ferro-chromium	1.00	0.00
71333	Kidney beans	0.96	0.03

Source: ITC

5.2.10 Export Diversification Opportunities for Pakistan in the Malaysian Market

The Malaysian market presents a diversified range of export diversification opportunities for Pakistan across industrial materials, agro-based commodities, seafood products, and selected consumer and manufacturing goods. The structure of Malaysia's import demand highlights meaningful scope for new product entry in categories where Pakistan currently has limited or no significant export presence, supported by both industrial requirements and consumer demand.

Industrial and intermediate goods constitute a major area of diversification opportunity. Strong import demand for flat-rolled steel, floating cranes and vessels, coaxial cables, vehicle wiring sets, nickel intermediate products, ferro-nickel, fertilizers, grinding balls, and PE/PP ropes and cables reflects demand linked to Malaysia's manufacturing and industrial sectors.

Agro-based and food commodities also show significant diversification potential. Products such as raw and refined sugar, processed palm oil, grapes, groundnuts, legumes, chickpeas, lentils, green tea, cardamoms, castor oil, groundnut oil, seafood products including shrimps, prawns, tuna, sardines, and rock lobster indicate sustained food consumption and agro-processing demand.

Selected textile, household, and consumer-oriented goods represent another area of opportunity, including textile floor coverings, footwear, notebooks, ceramic tiles, sanitary fixtures, washing machines, cast iron household articles, wigs, women's dresses, and granite products. These categories reflect niche opportunities within Malaysia's diversified consumer market.

Table 5.10 Export Diversification Opportunities for Pakistan in the Malaysian Market

HS Code	Product	Malaysia Imports (\$ in millions)	Tariff (%)
8517XX	Mobile phones	2,200.00	-
1701XX	Cane sugar, raw	908.00	-
720839	Flat-rolled steel	697.00	0.15
151190	Processed palm oil	689.00	0.00
6907	Ceramic tiles	223.00	0.15
890590	Floating cranes/vessels	201.00	0.00
854420	Coaxial cables	192.00	0.00
852872	Television receivers	186.00	0.00
1605Xa	Prepared shrimps/prawns	172.00	-

HS Code	Product	Malaysia Imports (\$ in millions)	Tariff (%)
691010	Ceramic sanitary fixtures	164.00	0.20
170199	Refined sugar	113.00	0.00
854430	Vehicle wiring sets	106.00	0.00
80610	Grapes (fresh)	99.00	0.00
1202	Groundnuts	82.00	0.00
5703Xb	Tufted textile floor coverings	39.00	-
71331	Beans (Vigna mungo/radiata)	35.00	0.00
640220	Footwear (strap uppers)	33.00	0.00
160414	Prepared tuna	33.00	0.00
0306Xe	Fresh shrimps/prawns	33.00	-
680293	Worked granite	31.00	0.20
482010	Notebooks & diaries	29.00	0.15
570242	Floor coverings (textile)	27.00	0.10
310530	Diammonium phosphate	26.00	0.00
310390	Phosphatic fertilizers	25.00	0.00
160413	Prepared sardines	25.00	0.00
640340	Safety footwear (metal toe)	24.00	0.00
90220	Green tea	22.00	0.00
4402XX	Wood charcoal	17.00	-
750120	Nickel intermediate products	15.00	0.00
720260	Ferro-nickel	13.00	0.00
845012	Washing machines	13.00	0.00
560749	PE/PP ropes & cables	13.00	0.00
670420	Human hair wigs	12.00	0.10
732391	Cast iron household articles	12.00	0.12
640291	Ankle-high footwear	10.00	0.00
670419	Synthetic wigs	7.50	0.10
71320	Chickpeas	7.10	0.00
0713Xb	Legumes, dried (n.e.s.)	7.00	-
71340	Lentils	7.00	0.00
0908Xc	Cardamoms	6.70	-
732591	Grinding balls	6.40	0.00
71332	Adzuki beans	5.80	0.00
680223	Granite articles	5.10	0.20
151530	Castor oil	5.00	0.00
0802Xc	Macadamia nuts	5.00	-
0713Xa	Beans (n.e.s.)	2.90	-
150810	Groundnut oil (crude)	2.80	0.00
0306Xb	Rock lobster	2.70	-
71333	Kidney beans	1.60	0.00
610444	Women's dresses (synthetic)	1.60	0.00

Source: ITC

MARKETS COMPETITIVENESS ANALYSIS OF PAKISTAN'S EXPORT PRODUCTS WITH UNTAPPED EXPORT POTENTIAL



Chapter 6

MARKETS COMPETITIVENESS ANALYSIS OF PAKISTAN'S EXPORT PRODUCTS WITH UNTAPPED EXPORT POTENTIAL

The present chapter evaluates the competitive position of products where export activity is already established but where significant unrealized potential persists across selected international markets. The analysis compares Pakistan's performance with competing exporting countries for each product-market combination using export shares and unit values. Competing suppliers are identified based on their presence and performance in destination markets, while unit values provide an indication of relative positioning in price and value segments.

This comparative framework helps distinguish between price-driven competitiveness and value-added positioning across products. Lower unit values generally reflect stronger price competitiveness, whereas higher unit values indicate greater differentiation, quality upgrading, or specialization in higher-value segments.

The analysis is applied to selected HS-6 product categories identified in the previous chapter as having significant unrealized export potential in respective markets. For each country, Pakistan's relative position is assessed in terms of its share in imports and unit value performance compared to key competing suppliers, allowing a focused understanding of where competitiveness gaps constrain fuller realization of existing export opportunities.

The findings of this chapter are intended to highlight areas for strengthening competitiveness within existing product lines and improving Pakistan's ability to capture a greater share of established international markets.

6.1 Competitiveness and Unit Value Positioning of Export

Products in the USA Market

The selected product categories in the US market show that Pakistan's competitiveness is mainly concentrated in primary commodities and textile-linked products, where performance is reflected more through price positioning than value differentiation. Across several products, Pakistan appears among suppliers with relatively lower unit values compared to high-end exporters, indicating a stronger position in cost-sensitive segments of the market.

In cotton yarn (520512), Pakistan records a comparatively higher unit value (2426) than most Asian suppliers such as Bangladesh (1045) and Ethiopia (1752), suggesting a weaker price competitiveness in this segment. A similar pattern is observed in sesame seeds (120740), where Pakistan's unit value (1275) remains below several African suppliers but above low-cost origins like Bangladesh, indicating mid-range positioning within the market structure.

In broken rice (100640), Pakistan's unit value (422) is among the lowest in the group, reflecting strong price competitiveness in this segment. In contrast, for chromium ores (261000), Pakistan's unit value (313) is again positioned close to other low-cost suppliers, indicating participation in a cost-driven commodity market.

In textile-based exports such as T-shirts (610910) and men's trousers (620342), Pakistan's unit values (28688 and 21919 respectively) remain significantly below high-value suppliers such as Portugal and Korea, but above the lowest-cost Asian suppliers, reflecting a mid-to-low value positioning. A similar pattern is observed in fish-based products (230120), where Pakistan's unit value (1101) remains among the lower range of suppliers.

Overall, the results indicate that Pakistan's presence in the US market is largely concentrated in price-sensitive segments, where competitiveness is driven by cost efficiency rather than value addition. The comparison of unit values across competing exporters suggests room for upgrading in selected textile categories, while maintaining strength in selected primary and low-value commodity segments where price advantage remains relevant.

Table 6.1 Unit Value Positioning of Pakistan's Export Products in the USA Market

S.No	Importing Countries	Share in USA imports	Unit Value (Tons)	S.No	Importing Countries	Share in USA imports	Unit Value (Tons)
630260 Toilet linen and kitchen linen of cotton							
Total Importing Countries		15		Highest Unit Value (Tons)		99,813 (France)	
1.	Bangladesh	1.80	4,459.00	6.	Viet Nam	1.20	9,012.00
2.	Pakistan	24.30	4,823.00	7.	Türkiye	7.00	11,017.00
3.	India	40.60	6,418.00	8.	El Salvador	0.20	11,098.00
4.	Mexico	0.10	6,471.00	9.	Thailand	0.10	15,424.00
5.	Colombia	3.00	7,798.00	10.	Portugal	1.20	17,141.00
630231 Bedlinen of cotton							
Total Importing Countries		13		Highest Unit Value (Tons)		1,07,488 (Philippines)	
1.	Pakistan	17.70	6,637.00	6.	Bangladesh	0.50	12,027.00
2.	Cambodia	0.10	7,991.00	7.	Israel	0.10	15,531.00
3.	Türkiye	0.40	8,795.00	8.	Viet Nam	0.10	17,370.00
4.	China	12.00	9,269.00	9.	Portugal	3.10	22,127.00
5.	Bahrain	3.20	9,966.00	10.	Italy	2.60	46,945.00
620342 Men's cotton trousers							
Total Importing Countries		35		Highest Unit Value (Tons)		1,87,556 (Romania)	
1.	China	6.30	9,233.00	6.	Madagascar	1.80	13,420.00
2.	Tanzania	0.20	10,710.00	7.	Bangladesh	34.50	13,526.00
3.	Lesotho	0.80	12,321.00	8.	Egypt	3.70	14,486.00
4.	Pakistan	8.80	12,804.00	9.	Mexico	15.90	14,635.00
5.	Madagascar	1.80	13,420.00	10.	Kenya	1.40	15,513.00
630210 Bedlinen knitted/crocheted							
Total Importing Countries		15		Highest Unit Value (Tons)		54,889 (Italy)	
1.	Pakistan	40.90	5,618.00	6.	Türkiye	0.50	9,808.00
2.	China	41.90	6,093.00	7.	Sri Lanka	0.10	10,476.00
3.	India	7.40	8,537.00	8.	Viet Nam	0.40	12,032.00
4.	Bangladesh	0.10	8,710.00	9.	Mexico	7.20	13,497.00
5.	Türkiye	0.50	9,808.00	10.	Cambodia	0.50	18,765.00
620462 Women's cotton trousers							
Total Importing Countries		34		Highest Unit Value (Tons)		2,56,833 (Romania)	
1.	Tanzania	0.30	6,307.00	6.	Cambodia	8.10	14,529.00
2.	China	16.80	8,308.00	7.	Bangladesh	19.00	15,617.00
3.	Kenya	0.30	13,749.00	8.	Pakistan	11.00	15,935.00
4.	Cambodia	8.10	14,529.00	9.	Haiti	0.20	16,037.00
5.	Bangladesh	19.00	15,617.00	10.	El Salvador	0.10	16,778.00
630710 Cleaning cloths							
Total Importing Countries		25		Highest Unit Value (Tons)		46,571 (France)	
1.	Pakistan	32.40	2,888.00	6.	Mexico	1.50	7,642.00
2.	Bangladesh	1.40	3,537.00	7.	Israel	0.20	8,005.00
3.	Colombia	0.30	4,085.00	8.	Indonesia	0.30	8,460.00
4.	China	53.00	4,959.00	9.	UK	0.10	8,473.00
5.	India	2.90	6,446.00	10.	Viet Nam	3.20	9,019.00

S.No	Importing Countries	Share in USA imports	Unit Value (Tons)	S.No	Importing Countries	Share in USA imports	Unit Value (Tons)
611020 Cotton jerseys							
Total Importing Countries		38		Highest Unit Value (Tons)		24,6607 (Italy)	
1.	Haiti	0.70	8,646.00	6.	Myanmar	0.10	14,875.00
2.	Pakistan	5.80	9,072.00	7.	Bangladesh	7.20	14,859.00
3.	China	14.10	10,540.00	8.	El Salvador	2.00	16,153.00
4.	Honduras	5.50	12,418.00	9.	Lao Republic	0.20	17,473.00
5.	Nicaragua	3.30	12,502.00	10.	Cambodia	8.90	17,582.00
100630 Semi-milled rice							
Total Importing Countries		20		Highest Unit Value (Tons)		2,324 (Korea)	
1.	China	3.70	663.00	6.	Brazil	1.10	1,083.00
2.	Argentina	1.40	808.00	7.	Thailand	55.70	1,072.00
3.	Viet Nam	1.70	994.00	8.	Cambodia	0.20	1,157.00
4.	Taipei	0.30	1,071.00	9.	Netherlands	0.10	1,232.00
5.	Thailand	55.70	1,072.00	10.	India	27.00	1,359.00
14.	Pakistan	2.80	1,675.00				
630239 Bedlinen (other textile materials)							
Total Importing Countries		24		Highest Unit Value (Tons)		1,33,000 (Australia)	
1.	Pakistan	3.00	8,797.00	6.	Cambodia	9.40	25,997.00
2.	Canada	0.10	10,429.00	7.	Mexico	0.10	26,667.00
3.	China	44.00	11,409.00	8.	Portugal	22.90	39,073.00
4.	Thailand	0.10	12,600.00	9.	Peru	0.40	42,500.00
5.	India	11.20	19,400.00	10.	Türkiye	0.40	51,429.00
630232 Bedlinen man-made fibres							
Total Importing Countries		11		Highest Unit Value (Tons)		76,889 (Italy)	
1.	Pakistan	5.20	4,528.00	6.	Bangladesh	0.10	10,155.00
2.	China	83.50	4,876.00	7.	Türkiye	0.30	15,255.00
3.	Colombia	0.10	6,263.00	8.	Mexico	3.30	27,248.00
4.	Viet Nam	0.40	7,731.00	9.	El Salvador	0.10	31,474.00
5.	India	6.30	8,321.00	10.	Dominican	0.30	32,235.00

Source: ITC

6.2 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

Chinese Market

The selected product categories in the China market show varied competitiveness, where Pakistan's positioning differs across commodities and textile-linked products.

In refined copper (740319), Pakistan's unit value (9140) lies between lower-cost suppliers such as Kazakhstan (7154) and higher-value Chile (9944), indicating mid-to-upper positioning in a dispersed pricing structure. In cotton yarn (520512 and 520511), Pakistan's unit values (2426 and 2391) remain above several regional competitors like Bangladesh (1045) and Viet Nam (2116), reflecting relatively stronger price positioning within this segment.

In agricultural products such as sesame seeds (1275) and broken rice (422), Pakistan operates in lower-to-mid unit value ranges, where price sensitivity is higher. In chromium ores (313), Pakistan is positioned toward the upper end of observed values compared to suppliers such as Oman (236) and South Africa (279).

In textiles and apparel such as cotton T-shirts (28688) and trousers (21919), Pakistan remains in a mid-tier position, below higher-value exporters but above low-cost suppliers.

Overall, Pakistan's unrealized export potential in China is linked to strengthening its mid-tier positioning in products where it already performs relatively better, while improving cost efficiency and quality consistency in more price-sensitive agricultural segments.

Table 6.2 Unit Value Positioning of Pakistan's Export Products in the Chinese Market

S.No	Importing Countries	Share in China imports	Unit Value (Tons)	S.No	Importing Countries	Share in China imports	Unit Value (Tons)
740319 Copper, refined, unwrought							
Total Importing Countries			36	Highest Unit Value (Tons):		9,944 (Chile)	
1.	Kazakhstan	0.20	7,154.00	6.	India	3.30	8,844.00
2.	Cameroon	0.10	8,130.00	7.	Armenia	0.20	8,866.00
3.	Djibouti	0.10	8,440.00	8.	Indonesia	1.60	8,966.00
4.	Japan	1.20	8,739.00	9.	Georgia	0.20	8,971.00
5.	Uzbekistan	0.40	8,758.00	10.	Egypt	0.20	8,989.00
22.	Pakistan	20.60	9,140.00				
520512 Single cotton yarn (≥85% cotton, uncombed)							
Total Importing Countries			15+	Highest Unit Value (Tons):		2,426 (Pakistan)	
1.	Bangladesh	4.70	1,045.00	6.	Indonesia	1.40	1,984.00
2.	Turkmenistan	0.20	1,703.00	7.	Taipei, Chinese	4.10	2,016.00
3.	Ethiopia	0.10	1,752.00	8.	Viet Nam	47.50	2,116.00
4.	Tajikistan	0.10	1,770.00	9.	Kazakhstan	0.10	2,212.00
5.	Thailand	0.10	1,888.00	10.	India	10.00	2,305.00
11.	Pakistan	16.60	2,426.00				
120740 Sesamum seeds							
Total Importing Countries			20+	Highest Unit Value (Tons):		3,381 (Mexico)	
1.	Bangladesh	0.70	1,095.00	6.	Niger	27.60	1,629.00
2.	Pakistan	12.10	1,275.00	7.	Gambia	0.30	1,655.00
3.	Myanmar	4.60	1,524.00	8.	Mali	2.00	1,660.00
4.	Senegal	0.30	1,525.00	9.	Bolivia	0.10	1,701.00
5.	Tanzania	12.30	1,553.00	10.	Uganda	0.40	1,704.00
100640 Broken rice							
Total Importing Countries			4	Highest Unit Value (Tons):		527 (Viet Nam)	
1.	Pakistan	16.50	422.00	3.	Thailand	23.30	507.00
2.	Myanmar	48.50	437.00	4.	Viet Nam	11.60	527.00
520511 Single cotton yarn (≥85% cotton, uncombed)							
Total Importing Countries			18+	Highest Unit Value (Tons):		33,429 (Italy)	
1.	Myanmar	0.10	1,005.00	6.	Viet Nam	51.70	1,934.00
2.	Cambodia	0.20	1,020.00	7.	Taipei, Chinese	1.50	1,993.00
3.	Bangladesh	1.70	1,198.00	8.	Thailand	0.10	2,000.00
4.	Indonesia	0.30	1,223.00	9.	Pakistan	41.20	2,391.00
5.	India	1.40	1,752.00	10.	China	0.10	2,672.00
261000 Chromium ores							
Total Importing Countries			12+	Highest Unit Value (Tons):		349 (Türkiye)	
1.	Oman	0.90	236.00	6.	Pakistan	1.90	313.00
2.	South Africa	79.00	279.00	7.	Zimbabwe	7.00	323.00
3.	UAE	0.30	297.00	8.	Papua New Guinea	0.90	324.00
4.	Madagascar	0.70	311.00	9.	Albania	2.00	338.00
5.	Iran	0.10	311.00	10.	Philippines	0.70	342.00

S.No	Importing Countries	Share in China imports	Unit Value (Tons)	S.No	Importing Countries	Share in China imports	Unit Value (Tons)
610910 T-shirts, singlets of cotton, knitted or crocheted							
Total Importing Countries			40+	Highest Unit Value (Tons):		8,18,742 (Italy)	
1.	Bangladesh	7.20	16,613.00	6.	Türkiye	4.90	85,708.00
2.	Pakistan	1.40	28,688.00	7.	China	3.40	104,154.00
3.	Cambodia	3.10	43,351.00	8.	Peru	2.60	146,295.00
4.	Indonesia	2.70	47,925.00	9.	Korea, Republic of	3.00	172,150.00
5.	Viet Nam	17.10	49,716.00	10.	Portugal	19.10	413,077.00
740200 Copper, unrefined							
Total Importing Countries			20+	Highest Unit Value (Tons):		10,650 (Cambodia)	
1.	Indonesia	0.10	7,480.00	6.	South Africa	6.80	9,072.00
2.	Malaysia	0.30	8,254.00	7.	DR Congo	13.60	9,064.00
3.	Taipei, Chinese	0.10	8,254.00	8.	Peru	1.40	9,184.00
4.	Türkiye	1.00	8,647.00	9.	Thailand	1.20	9,419.00
5.	Nigeria	1.20	8,774.00	10.	Zambia	47.60	9,465.00
22.	Pakistan	4.00	10,624.00				
620342 Men's or boys' trousers, bib and brace overalls of cotton							
Total Importing Countries			36	Highest Unit Value (Tons):		9,43,000 (France)	
1.	Macao, China	0.40	11,949.00	6.	India	3.80	25,639.00
2.	Nicaragua	0.20	18,905.00	7.	Guatemala	0.20	29,056.00
3.	Myanmar	0.50	21,016.00	8.	Mexico	0.60	31,216.00
4.	Pakistan	2.00	21,919.00	9.	Cambodia	1.80	34,372.00
5.	Bangladesh	14.10	25,612.00	10.	Morocco	1.50	36,311.00
230120 Flours, meals and pellets of fish or crustaceans, molluscs							
Total Importing Countries			21	Highest Unit Value (Tons):		2,518 (Norway)	
1.	Pakistan	0.80	1,101.00	6.	Panama	0.90	1,415.00
2.	Viet Nam	7.40	1,149.00	7.	India	3.00	1,444.00
3.	Malaysia	1.50	1,319.00	8.	Ecuador	3.10	1,496.00
4.	Thailand	5.50	1,350.00	9.	Mauritania	2.60	1,524.00
5.	Myanmar	1.20	1,404.00	10.	South Africa	0.70	1,529.00

Source: ITC

6.3 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

UK Market

The UK market analysis shows that Pakistan's competitiveness in products identified with unrealized export potential is primarily concentrated in textile-based goods and selected agro-based items, where performance is largely reflected through price positioning rather than value differentiation.

In key textile categories such as bedlinen of cotton (630231), toilet and kitchen linen (630260), knitted bedlinen (630210), cotton trousers (620342), cotton sweaters (611020), and hosiery (611595), Pakistan consistently holds notable market shares, indicating a strong established export presence. However, unit value comparisons show that Pakistan is generally positioned in lower-to-mid price segments compared to higher-value suppliers such as Italy, Portugal, and Türkiye, which capture premium pricing in most product lines.

A similar pattern is observed in bedlinen (non-cotton) (630239), where Pakistan and China both maintain significant market shares, but higher unit values are recorded for suppliers in developed European markets, indicating stronger value addition and product differentiation in those segments. In ethyl alcohol (220710), Pakistan's unit value positioning remains below major high-value suppliers, despite participation in a large and diversified import market.

In husked rice (100620), Pakistan shows a relatively competitive price position with moderate unit values compared to other suppliers, reflecting cost-based competitiveness in a commodity-driven segment.

Overall, the UK market reflects a clear structure where Pakistan maintains strong participation in selected high-demand textile and related products, but remains largely concentrated in price-sensitive segments. The comparison of unit values suggests that while market access is established, moving toward higher-value segments through quality upgrading, product differentiation, and branding remains key to converting existing presence into stronger export gains.

Table 6.3 Unit Value Positioning of Pakistan's Export Products in the UK Market

S.No	Importing Countries	Share in UK imports	Unit Value (Tons)	S.No	Importing Countries	Share in UK imports	Unit Value (Tons)
630231 Bedlinen of cotton							
Total Importing Countries		15		Highest Unit Value (Tons)		94375 (Italy)	
1.	Pakistan	61.00	6,561.00	6.	Türkiye	1.10	11,798.00
2.	Bangladesh	4.70	9,625.00	7.	India	15.80	12,018.00
3.	Bahrain	0.40	10,102.00	8.	Ireland	0.10	12,333.00
4.	China	7.10	10,408.00	9.	United Arab Emirates	0.10	12,875.00
5.	Germany	0.10	11,480.00	10.	Portugal	7.30	26,598.00
630260 Toilet/kitchen linen							
Total Importing Countries		16		Highest Unit Value (Tons)		71250 (Italy)	
1.	Pakistan	40.10	5,056.00	6.	Ireland	0.50	9,139.00
2.	Bangladesh	6.60	5,418.00	7.	Türkiye	11.60	9,829.00
3.	Egypt	0.10	6,346.00	8.	Bulgaria	0.20	10,565.00
4.	India	27.20	6,367.00	9.	Belgium	0.10	11,222.00
5.	China	6.70	8,061.00	10.	United States of America	0.10	14,625.00
100620 Husked rice							
Total Importing Countries		14		Highest Unit Value (Tons)		1622 (Italy)	
1.	Guyana	0.50	575.00	6.	Pakistan	36.60	951.00
2.	Paraguay	0.30	631.00	7.	United States of America	0.90	955.00
3.	Uruguay	10.60	719.00	8.	France	0.20	998.00
4.	Argentina	2.00	812.00	9.	Greece	0.50	1,110.00
5.	Brazil	0.20	834.00	10.	India	45.50	1,167.00
630239 Bedlinen (non-cotton)							
Total Importing Countries		17		Highest Unit Value (Tons)		144000 (Italy)	
1.	Pakistan	43.30	5,315.00	6.	United States of America	0.60	16,417.00
2.	Bangladesh	0.60	5,971.00	7.	Ireland	0.10	17,000.00
3.	Macedonia, North	0.40	10,286.00	8.	Cambodia	0.10	17,333.00
4.	Türkiye	0.80	11,458.00	9.	India	4.70	19,605.00
5.	China	32.70	12,571.00	10.	Viet Nam	0.10	24,000.00
620342 Men's trousers cotton							
Total Importing Countries		37		Highest Unit Value (Tons)		195899 (Italy)	
1.	Pakistan	13.40	13,959.00	6.	Guatemala	0.10	18,417.00
2.	Bangladesh	40.20	15,962.00	7.	France	0.10	20,649.00
3.	Myanmar	0.20	16,815.00	8.	Cambodia	1.60	20,888.00
4.	India	2.50	17,820.00	9.	Egypt	2.10	22,809.00
5.	Lao People's Democratic Republic	0.10	18,233.00	10.	China	7.10	25,261.00
611595 Hosiery							
Total Importing Countries		29		Highest Unit Value (Tons)		240000 (Slovakia)	
1.	Myanmar	1.50	5,848.00	6.	Türkiye	33.80	13,202.00
2.	China	29.20	11,175.00	7.	Poland	0.10	14,625.00
3.	India	2.00	11,453.00	8.	Thailand	0.10	15,222.00
4.	Indonesia	0.50	12,410.00	9.	Ireland	0.50	16,637.00
5.	Pakistan	19.00	12,652.00	10.	Bangladesh	0.10	17,929.00

S.No	Importing Countries	Share in UK imports	Unit Value (Tons)	S.No	Importing Countries	Share in UK imports	Unit Value (Tons)
630210 Bedlinen, knitted or crocheted							
Total Importing Countries		15		Highest Unit Value (Tons)		59000 (Italy)	
1.	Pakistan	49.20	5,907.00	6.	Belgium	0.20	13,000.00
2.	China	31.50	6,390.00	7.	Bangladesh	0.60	13,308.00
3.	Ireland	0.30	7,077.00	8.	India	2.30	13,309.00
4.	Germany	0.10	12,333.00	9.	Türkiye	2.90	13,954.00
5.	Romania	1.40	12,611.00	10.	United States of America	0.30	16,833.00
220710 Ethyl alcohol							
Total Importing Countries		15		Highest Unit Value (Tons)		1356 (France)	
1.	Brazil	4.40	762.00	6.	Netherlands	3.30	944.00
2.	China	0.10	774.00	7.	Kazakhstan	0.70	973.00
3.	Argentina	1.60	794.00	8.	Pakistan	3.40	1,082.00
4.	United States of America	77.60	839.00	9.	South Africa	0.70	1,112.00
5.	Paraguay	1.60	847.00	10.	Hungary	0.10	1,142.00
611020 Cotton sweaters							
Total Importing Countries		40		Highest Unit Value (Tons)		218083 (Moldova)	
1.	Nicaragua	0.10	6,552.00	6.	Indonesia	1.00	18,143.00
2.	Philippines	0.20	8,903.00	7.	Cambodia	7.40	20,492.00
3.	Egypt	1.30	12,722.00	8.	Morocco	0.80	21,338.00
4.	Pakistan	10.80	13,254.00	9.	Honduras	0.20	22,375.00
5.	Bangladesh	23.90	17,234.00	10.	Malaysia	0.40	22,467.00

Source: ITC

6.4 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

UAE Market

The UAE market shows that Pakistan's competitive position in products with unrealised export potential is relatively strong in terms of market participation, particularly in agro-based goods, textiles, and selected manufactured items, but remains largely concentrated in price-sensitive segments when assessed through unit value positioning.

In agro-based products such as bovine carcasses (020110), semi-milled rice (100630), and cereal straw (121300), Pakistan holds a dominant or highly significant market share, indicating strong supply capacity and established trade linkages. However, unit value comparisons suggest that competing suppliers in several cases achieve higher pricing levels, particularly in rice and livestock-related categories, reflecting differentiation in quality standards and market segmentation.

In textiles and apparel, including cotton T-shirts (610910), men's trousers (620342), cotton ensembles (620322), bedlinen (630231), toilet and kitchen linen (630260), and tents (630629), Pakistan maintains substantial export shares across multiple categories. However, unit values remain below those of higher-positioned suppliers such as Türkiye, Italy, France, and the United States, indicating limited penetration into premium and higher-value segments despite strong volume presence.

In worn clothing (630900), Pakistan's unit value is relatively low compared to several European suppliers, suggesting continued concentration in lower-value segments of the re-export and second-hand trade structure of the UAE market.

Overall, the UAE market reflects a dual competitive position for Pakistan: strong market access and high participation in key product categories, but persistent reliance on lower-unit-value segments. The comparison indicates scope for upgrading through quality improvement, product differentiation, and movement toward higher-value market segments to better realise existing export potential.

Table 6.4 Unit Value Positioning of Pakistan's Export Products in the UAE Market

S.No	Importing Countries	Share in UAE imports	Unit Value (Tons)	S.No	Importing Countries	Share in UAE imports	Unit Value (Tons)
020110 Carcasses or half-carcasses of bovine animals							
Total Importing Countries:		8		Highest Unit Value (Tons):		11054 (Netherlands)	
1.	USA	0.10	2,274.00	5.	South Africa	0.30	6,167.00
2.	Pakistan	97.30	4,237.00	6.	India	0.10	7,320.00
3.	Tanzania	0.40	4,776.00	7.	New Zealand	0.30	9,000.00
4.	Ethiopia	0.30	4,957.00	8.	Netherlands	0.40	11,054.00
5.	Kenya	0.70	5,457.00				
100630 Semi-milled rice (UAE)							
Total Importing Countries:		11		Highest Unit Value (Tons):		2460 (Spain)	
1.	Pakistan	17.50	704.00	6.	India	73.00	859.00
2.	Viet Nam	6.70	777.00	7.	USA	0.40	1,364.00
3.	Egypt	0.10	814.00	8.	Italy	0.20	2,363.00
4.	Cambodia	0.10	820.00	9.	Japan	0.20	2,373.00
5.	Thailand	1.10	858.00	10.	Sri Lanka	0.50	2,444.00
630900 Worn clothing							
Total Importing Countries:		33		Highest Unit Value (Tons):		11300 (Philippines)	
1.	Oman	0.40	113.00	6.	Latvia	0.40	283.00
2.	Tunisia	0.10	208.00	7.	Croatia	0.20	295.00
3.	Italy	1.10	253.00	8.	Bulgaria	0.30	308.00
4.	Malaysia	0.90	251.00	9.	Slovakia	0.30	325.00
5.	Portugal	1.70	267.00	10.	Slovenia	0.30	333.00
22.	Pakistan	1.80	479.00				
620342 Men's trousers cotton							
Total Importing Countries		30+		Highest Unit Value (Tons):		797000 (France)	
1.	India	18.90	9,483.00	6.	Korea	0.10	19,167.00
2.	Egypt	1.10	9,692.00	7.	Jordan	0.60	19,814.00
3.	Pakistan	20.30	11,969.00	8.	Indonesia	1.70	27,611.00
4.	China	20.20	13,037.00	9.	Singapore	0.30	29,545.00
5.	Myanmar	0.20	19,053.00	10.	Viet Nam	2.80	32,718.00
610910 T-shirts cotton							
Total Importing Countries:		40+		Highest Unit Value (Tons):		451351 (Italy)	
1.	Egypt	1.40	1,080.00	6.	Pakistan	2.60	11,582.00
2.	India	33.60	6,795.00	7.	Thailand	0.40	12,005.00
3.	Korea	0.10	7,483.00	8.	China	20.50	12,203.00
4.	Singapore	0.10	9,071.00	9.	Myanmar	0.10	15,759.00
5.	Germany	0.20	9,513.00	10.	Mauritius	0.10	17,200.00
620322 Cotton ensembles							
Total Importing Countries:		7+		Highest Unit Value (Tons):		445000 (USA)	
1.	Egypt	1.70	2,150.00	6.	Türkiye	1.60	25,250.00
2.	China	66.80	5,712.00	7.	Italy	0.70	44,000.00
3.	Pakistan	12.80	7,219.00	8.	Spain	0.50	66,000.00
4.	Russia	0.10	9,000.00	9.	France	0.90	113,000.00
5.	India	9.80	11,902.00	10.	United States of America	3.60	445,000.00
121300 Cereal straw							
Total Importing Countries		11		Highest Unit Value (Tons):		5000 (Mozambique)	
1.	Iran	0.20	44.00	6.	Italy	9.90	205.00
2.	Pakistan	66.70	77.00	7.	Bulgaria	1.00	212.00
3.	Egypt	9.10	172.00	8.	Tanzania	0.10	231.00
4.	Spain	7.10	173.00	9.	Saudi Arabia	0.10	311.00
5.	Romania	1.80	197.00	10.	South Africa	0.40	320.00

S.No	Importing Countries	Share in UAE imports	Unit Value (Tons)	S.No	Importing Countries	Share in UAE imports	Unit Value (Tons)
630260 Toilet/kitchen linen							
Total Importing Countries		18		Highest Unit Value (Tons):			147063 (Italy)
1.	China	13.60	2,924.00	6.	Türkiye	11.90	12,236.00
2.	Pakistan	17.20	3,103.00	7.	France	1.20	12,500.00
3.	India	42.00	4,403.00	8.	Colombia	0.10	13,000.00
4.	Georgia	0.10	6,875.00	9.	Thailand	0.10	13,200.00
5.	Russian Federation	0.10	9,667.00	10.	Egypt	0.40	14,357.00
630231 Bedlinen cotton							
Total Importing Countries		12		Highest Unit Value (Tons):			124000 (France)
1.	Thailand	0.20	3,950.00	6.	Egypt	0.10	15,000.00
2.	China	23.60	6,940.00	7.	Viet Nam	0.50	30,750.00
3.	Pakistan	18.60	7,746.00	8.	Germany	0.10	31,000.00
4.	Türkiye	2.50	12,740.00	9.	Portugal	7.40	45,550.00
5.	India	41.30	13,088.00	10.	UK	0.60	63,000.00
630629 Tents							
Total Importing Countries:		11		Highest Unit Value (Tons)			27000 (Netherlands)
1.	Jordan	0.10	1,625.00	6.	Saudi Arabia	19.50	5,451.00
2.	Pakistan	47.50	3,791.00	7.	United States of America	3.80	16,038.00
3.	India	0.10	4,250.00	8.	South Africa	3.30	18,795.00
4.	China	15.90	4,637.00	9.	Belgium	0.10	21,000.00
5.	France	8.70	5,410.00	10.	Italy	0.50	22,000.00

Source: ITC

6.5 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

German Market

The Germany market shows that Pakistan's competitive position in products with unrealized export potential is strongly anchored in textile and apparel categories, where Pakistan maintains a meaningful market presence but remains largely positioned in mid-to-lower unit value segments compared to higher-value European suppliers.

In key textile products such as cotton bedlinen (630231), knitted bedlinen (630210), toilet and kitchen linen (630260), cotton T-shirts (610910), women's cotton trousers (620462), cotton sweaters (611020), and hosiery (611595), Pakistan consistently holds visible market shares. However, unit value comparisons indicate that higher-value positioning is achieved by suppliers such as Türkiye, China, and several EU economies, particularly in premium apparel and home textile segments. This reflects a clear differentiation between volume-based participation and value-added positioning within the German import structure.

A similar pattern is observed in industrial textile-related goods such as cleaning cloths (630710), where Pakistan remains present in a highly competitive, price-sensitive segment dominated by multiple global suppliers. In rice (100630), Pakistan's unit value remains close to lower-tier suppliers, while higher-value imports are concentrated in European markets, indicating limited differentiation in this commodity segment.

Overall, the Germany market reflects a competitive structure where Pakistan maintains stable access in major textile categories but is primarily positioned in lower-to-mid value segments. The comparison suggests that while existing market penetration is strong, upgrading toward higher-value product segments through quality enhancement, branding, and product differentiation remains central to improving competitiveness and capturing greater export gains.

Table 6.5 Unit Value Positioning of Pakistan's Export Products in the Germany's Market

S.No.	Importing Countries	Share in Germany's imports (%)	Unit value (USD/unit)	S.No.	Importing Countries	Share in Germany's imports (%)	Unit value (USD/unit)
630231 Bedlinen of cotton							
Number of Importing Countries		23		Highest Unit Value (Tons)		69826 (Switzerland)	
1.	Romania	0.90	6,481.00	7.	Bangladesh	5.60	9,672.00
2.	Pakistan	46.90	7,425.00	8.	Egypt	0.10	10,250.00
3.	Czech Republic	4.30	8,762.00	9.	Netherlands	0.90	10,504.00
4.	Austria	1.10	9,107.00	10.	Denmark	1.00	10,634.00
5.	China	7.70	9,120.00	11.	India	5.40	10,905.00
6.	Poland	6.10	9,457.00	12.	Türkiye	14.40	10,964.00
Product: 630210 Bedlinen, knitted or crocheted							
Number of Importing Countries		23		Highest Unit Value (Tons)		51750 (Switzerland)	
1.	Pakistan	40.90	5,960.00	6.	Netherlands	2.00	8,218.00
2.	Romania	2.40	6,873.00	7.	Hungary	0.10	9,600.00
3.	China	12.40	6,945.00	8.	Türkiye	27.00	9,704.00
4.	Belgium	1.00	7,695.00	9.	Estonia	0.20	10,326.00
5.	India	0.50	7,705.00	10.	Spain	0.90	10,617.00
610910 T-shirts, singlets of cotton, knitted or crocheted							
Number of Importing Countries		50		Highest Unit Value (Tons)		157727 (Ecuador)	
1.	Morocco	2.00	11,064.00	6.	India	7.70	20,011.00
2.	Uzbekistan	0.20	13,104.00	7.	Romania	0.20	20,213.00
3.	Honduras	0.50	13,170.00	8.	Ukraine	0.10	21,358.00
4.	Bangladesh	42.90	16,294.00	9.	Pakistan	3.00	21,639.00
5.	Czech Republic	0.70	17,259.00	10.	Belgium	0.60	22,330.00
630260 Toilet linen and kitchen linen, of terry towelling							
Number of Importing Countries		26		Highest Unit Value (Tons)		47071 (Switzerland)	
1.	Pakistan	26.10	5,880.00	7.	Egypt	1.90	7,203.00
2.	India	12.30	5,908.00	8.	Netherlands	2.90	8,113.00
3.	Uzbekistan	0.20	6,107.00	9.	France	1.00	9,116.00
4.	Denmark	0.60	6,505.00	10.	Türkiye	27.50	9,847.00
5.	Colombia	0.20	6,819.00	11.	Belgium	0.40	10,008.00
6.	Bangladesh	6.90	7,026.00	12.	China	4.80	10,637.00
611595 Full-length or knee-length stockings, socks and other hosiery							
Number of Importing Countries		55		Highest Unit Value (Tons)		82273 (Korea)	
1.	Denmark	0.20	6,918.00	8.	China	24.70	14,688.00
2.	Myanmar	0.20	10,681.00	9.	Belgium	1.40	14,740.00
3.	Uzbekistan	0.20	11,294.00	10.	Bangladesh	0.70	16,337.00
4.	India	0.30	12,314.00	11.	Portugal	2.00	16,844.00
5.	Italy	1.30	13,036.00	12.	Pakistan	15.20	17,041.00
6.	Indonesia	3.20	13,839.00	13.	Türkiye	34.60	19,728.00
7.	Egypt	0.10	14,483.00	14.	Philippines	0.20	21,288.00
611020 Jerseys, pullovers, cardigans, waistcoats of cotton,							
Number of Importing Countries		44		Highest Unit Value (Tons)		202286 (Moldova)	
1.	Myanmar	1.60	10,793.00	8.	Belgium	0.70	20,965.00
2.	Indonesia	1.50	15,590.00	9.	Lao People's Democratic Republic	0.30	24,567.00
3.	Morocco	1.20	16,331.00	10.	Cambodia	5.70	24,687.00
4.	Pakistan	5.90	17,172.00	11.	India	4.10	24,983.00
5.	Honduras	0.20	17,183.00	12.	Türkiye	17.30	28,575.00
6.	Bangladesh	28.60	19,184.00	13.	China	15.10	29,378.00
7.	Egypt	1.70	20,685.00	14.	Poland	0.50	30,814.00

S.No.	Importing Countries	Share in Germany's imports (%)	Unit value (USD/unit)	S.No.	Importing Countries	Share in Germany's imports (%)	Unit value (USD/unit)
620462 Women's or girls' trousers and shorts of cotton							
Number of Importing Countries			38	Highest Unit Value (Tons)			196269 (USA)
1.	Myanmar	1.40	15,013.00	8.	Niger	0.10	29,048.00
2.	Bangladesh	26.80	19,609.00	9.	France	0.60	29,313.00
3.	Pakistan	11.50	21,030.00	10.	Egypt	2.90	29,793.00
4.	Sri Lanka	1.60	21,485.00	11.	China	6.80	31,021.00
5.	Spain	0.30	21,568.00	12.	India	2.10	32,473.00
6.	Cambodia	7.50	21,926.00	13.	Bosnia	0.10	32,533.00
7.	Ukraine	0.30	27,295.00	14.	Türkiye	19.80	35,430.00
100630 Semi-milled or wholly milled rice							
Number of Importing Countries			27	Highest Unit Value (Tons)			4364 (UK)
1.	Myanmar	0.10	735.00	7.	Thailand	2.60	1,295.00
2.	Argentina	0.10	810.00	8.	Greece	0.20	1,309.00
3.	Brazil	0.40	910.00	9.	USA	2.30	1,353.00
4.	Cambodia	2.90	974.00	10.	Pakistan	5.10	1,394.00
5.	Viet Nam	2.70	1,035.00	11.	Czech Republic	0.10	1,441.00
6.	Denmark	0.50	1,092.00	12.	Italy	34.40	1,452.00
630710 Floorcloths, dishcloths and similar cleaning cloths textile materials							
Number of Importing Countries			33	Number of Importing Countries			88400 (Thailand)
1.	Switzerland	2.20	3,012.00	8.	Poland	7.10	6,781.00
2.	Austria	1.20	4,345.00	9.	China	44.60	6,955.00
3.	Hong Kong	0.20	4,523.00	10.	Pakistan	1.00	6,967.00
4.	Czech Republic	3.90	5,692.00	11.	Türkiye	3.70	7,617.00
5.	USA	2.30	6,162.00	12.	Israel	0.10	7,667.00
6.	Cambodia	0.10	6,500.00	13.	Belgium	3.80	8,663.00
7.	Denmark	0.20	6,548.00	14.	Malaysia	0.30	9,703.00

Source: ITC

6.6 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

Netherlands Market

The Netherlands market indicates that Pakistan's competitiveness in products with unrealized export potential is concentrated in established textile, apparel, and agro-based categories, where Pakistan maintains a visible export presence but remains positioned largely in lower-to-mid unit value segments relative to higher-value European suppliers.

In textile and apparel products such as cotton bedlinen (630210), toilet and kitchen linen (630260), cotton T-shirts (610910), men's cotton trousers (620342), women's cotton trousers (620462), hosiery (611595), and cleaning cloths (630710), Pakistan holds measurable market shares across multiple product lines. However, unit value comparisons consistently show stronger price positioning by suppliers such as Türkiye, China, Belgium, and several EU economies in higher-value segments, indicating differentiation in quality, branding, and product upgrading within the same product categories.

In agro-based products such as semi-milled rice (100630) and husked rice (100620), Pakistan demonstrates relatively competitive pricing levels, with unit values close to other major Asian suppliers, reflecting a cost-based positioning in commodity-driven segments of the Dutch import market.

In industrial and intermediate goods such as ethyl alcohol (220710), Pakistan's presence remains limited and positioned within lower-value ranges compared to higher-priced suppliers such as European countries and North America, indicating scope for stronger value capture through product upgrading and diversification within existing trade flows.

Overall, the Netherlands market reflects a structure where Pakistan maintains stable participation in key export categories but remains primarily concentrated in price-sensitive segments. The comparison highlights that while export access is established, improving unit value positioning through quality enhancement, compliance upgrading, and product differentiation remains central to unlocking higher returns from existing export potential.

Table 6.6 Unit Value Positioning of Pakistan's Export Products in the Netherlands Market

S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)
220710 Undenatured ethyl alcohol							
Total Importing Countries		24		Highest Unit Value (USD/Ton)			1,466 (Sweden)
1.	Bolivia	0.50	759.00	6.	Costa Rica	1.50	878.00
2.	Brazil	2.10	795.00	7.	USA	1.60	880.00
3.	Guatemala	4.80	807.00	8.	Paraguay	0.10	887.00
4.	Canada	9.40	845.00	9.	Latvia	0.60	905.00
5.	Peru	9.10	855.00	10.	United Kingdom	9.40	926.00
620342 Men's cotton trousers							
Total Importing Countries		39		Highest Unit Value (USD/Ton)			84,714 (Australia)
1.	Bangladesh	14.40	15,980.00	6.	Cambodia	0.50	21,932.00
2.	Pakistan	4.10	16,776.00	7.	India	3.10	22,273.00
3.	Guatemala	0.10	18,242.00	8.	Macedonia	0.40	22,429.00
4.	Mexico	0.30	18,925.00	9.	Myanmar	0.20	22,728.00
5.	Egypt	1.50	20,749.00	10.	Mauritius	0.50	22,967.00
630210 Bedlinen, knitted or crocheted							
Total Importing Countries		17		Highest Unit Value (USD/Ton)			17,684 (Poland)
1.	Pakistan	57.40	5,887.00	6.	USA	0.10	7,500.00
2.	Egypt	4.30	5,894.00	7.	Türkiye	10.70	8,707.00
3.	Denmark	0.80	6,848.00	8.	Belgium	3.30	9,850.00
4.	India	1.40	7,240.00	9.	France	0.30	11,227.00
5.	China	6.30	7,257.00	10.	Germany	10.70	11,533.00
630260 Toilet/kitchen linen							
Total Importing Countries		25		Highest Unit Value (USD/Ton)			39,378 (Denmark)
1.	Morocco	0.10	5,087.00	6.	Viet Nam	0.20	7,500.00
2.	Pakistan	40.30	5,293.00	7.	Türkiye	11.20	8,395.00
3.	India	13.40	5,647.00	8.	China	7.90	8,823.00
4.	Bangladesh	2.80	5,901.00	9.	Canada	0.20	10,038.00
5.	Egypt	3.70	6,925.00	10.	Germany	4.20	11,521.00
611595 Hosiery							
Total Importing Countries		28		Highest Unit Value (USD/Ton)			93,167 (Slovakia)
1.	Belgium	4.40	2,874.00	6.	China	33.60	10,147.00
2.	Korea, Republic of	0.10	7,236.00	7.	Indonesia	0.10	11,304.00
3.	Pakistan	12.00	8,135.00	8.	Viet Nam	8.40	13,640.00
4.	Bangladesh	0.40	8,663.00	9.	Philippines	0.10	15,353.00
5.	Myanmar	0.30	9,149.00	10.	Thailand	0.40	16,118.00
100630 Semi-milled rice							
Total Importing Countries		28		Highest Unit Value (USD/Ton)			2,212 (Poland)
1.	Suriname	0.10	772.00	6.	Europe Othr. Nes	0.10	988.00
2.	Guyana	0.20	834.00	7.	Viet Nam	2.10	991.00
3.	Myanmar	2.60	857.00	8.	Thailand	13.30	1,083.00
4.	Greece	1.20	864.00	9.	Taipei, Chinese	0.10	1,084.00
5.	Cambodia	14.70	909.00	10.	Argentina	0.10	1,296.00

S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)
100620 Husked rice							
Total Importing Countries		21		Highest Unit Value (USD/Ton)			2,293 (Ireland)
1.	Guyana	0.50	660.00	6.	India	30.70	911.00
2.	Uruguay	4.80	730.00	7.	Pakistan	43.60	953.00
3.	Argentina	1.50	819.00	8.	Greece	0.50	1,003.00
4.	Brazil	1.30	838.00	9.	Belgium	8.40	1,081.00
5.	Viet Nam	0.30	850.00	10.	Cambodia	1.80	1,191.00
630710 Cleaning cloths							
Total Importing Countries		35		Highest Unit Value (USD/Ton)			18,667 (Slovakia)
1.	Israel	2.20	4,495.00	6.	Indonesia	0.20	7,212.00
2.	China	32.50	5,289.00	7.	Hong Kong, China	0.20	7,464.00
3.	Türkiye	0.70	5,311.00	8.	Egypt	0.20	8,174.00
4.	Pakistan	3.60	5,800.00	9.	India	0.20	9,000.00
5.	Cambodia	0.10	6,750.00	10.	Belgium	21.60	9,077.00
610910 Cotton T-shirts							
Total Importing Countries		47		Highest Unit Value (USD/Ton)			98,677 (Italy)
1.	Guatemala	0.20	9,255.00	6.	Morocco	0.10	11,581.00
2.	Bangladesh	20.90	10,791.00	7.	Malaysia	0.20	12,948.00
3.	Panama	0.10	10,842.00	8.	Belgium	5.60	14,572.00
4.	Viet Nam	4.20	11,288.00	9.	Nicaragua	0.10	14,828.00
5.	Cambodia	0.90	11,451.00	10.	Pakistan	1.10	14,948.00
620462 Women's cotton trousers							
Total Importing Countries		41		Highest Unit Value (USD/Ton)			1,20,179 (Switzerland)
1.	Cambodia	0.50	15,977.00	6.	Serbia	0.10	22,480.00
2.	Bangladesh	7.60	16,088.00	7.	China	7.80	23,579.00
3.	Pakistan	1.90	19,292.00	8.	Egypt	0.90	25,077.00
4.	Myanmar	0.40	19,769.00	9.	Mauritius	0.20	25,671.00
5.	Viet Nam	1.40	20,706.00	10.	Türkiye	18.10	26,023.00

Source: ITC

6.7 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

Afghan Market

The Afghanistan market shows a highly concentrated competitive structure where Pakistan dominates most selected product categories, particularly in agro-based commodities and basic manufactured goods. The analysis indicates that Pakistan's competitiveness is primarily driven by geographical proximity, established supply chains, and strong price-based positioning.

In key agricultural products such as semi-milled rice (100630), broken rice (100640), fresh potatoes (070190), citrus fruits (0805), guavas and mangoes (080450), and citrus (080590), Pakistan holds an overwhelmingly dominant market share, often supplying nearly the entire import demand. Unit value comparisons suggest that Pakistan generally operates in lower price segments relative to limited competing suppliers, reflecting a strong cost-competitive position in staple food and horticultural exports.

In industrial and processed products such as fibreboard (441193) and maize groats (110313), Pakistan again maintains complete or near-complete market presence, indicating strong supply-side control in essential goods for the Afghan market. Similarly, in chewing gum (170410), Pakistan holds a major share alongside regional suppliers such as Türkiye and China, with unit values indicating a mid-range positioning within a relatively small import structure.

In pharmaceuticals (300339), Pakistan also maintains a dominant share, though higher unit values observed for suppliers such as the United Arab Emirates indicate more value-added or premium positioning in limited segments.

Overall, the Afghanistan market reflects a highly concentrated and supply-linked export structure where Pakistan is a dominant supplier across most product categories. The comparison suggests that competitiveness is primarily volume and proximity driven, with limited differentiation across value segments, indicating both strong current market control and scope for upgrading in selected higher-value product categories where competition exists.

Table 6.7 Unit Value Positioning of Pakistan's Export Products in the Afghan Market

S.No	Importing Countries	Share in Afghanistan's imports	Unit Value (Tons)	S.No	Importing Countries	Share in Afghanistan's imports	Unit Value (Tons)
100630 Semi-milled rice							
Total Importing Countries		3		Highest Unit Value (Tons)			932 (India)
1.	Korea	0.40	276.00	3.	India	0.10	932.00
2.	Pakistan	99.50	648.00				
100640 Broken rice							
Total Importing Countries		1		Highest Unit Value (Tons)			467 (Pakistan)
1.	Pakistan	100.00	467.00				
070190 Fresh potatoes							
Total Importing Countries		1		Highest Unit Value (Tons)			171 (Pakistan)
1.	Pakistan	100.00	171.00				
0805 Citrus fruit							
Total Importing Countries		3		Highest Unit Value (Tons)			1091 (Egypt)
1.	Pakistan	93.00	170.00	3.	Egypt	0.10	1,091.00
2.	United Arab Emirates	6.90	647.00				
441193 Fibreboard							
Total Importing Countries		1		Highest Unit Value (Tons)			7373 (Pakistan)
1.	Pakistan	100.00	7,373.00				
080590 Citrus (excl. main types)							
Total Importing Countries		1		Highest Unit Value (Tons)			147 (Pakistan)
1.	Pakistan	100.00	147.00				
080450 Guavas, mangoes							
Total Importing Countries		1		Highest Unit Value (Tons)			444 (Pakistan)
1.	Pakistan	100.00	444.00				
300339 Medicaments							
Total Importing Countries		3		Highest Unit Value (Tons)			10400 (United Arab Emirates)
1.	Pakistan	98.30	5,466.00	3.	United Arab Emirates	0.40	10,400.00
2.	Netherlands	1.30	8,227.00				
110313 Maize groats							
Total Importing Countries		2		Highest Unit Value (Tons)			316 (Türkiye)
1.	Pakistan	99.90	50.00	2.	Türkiye	0.10	316.00
170410 Chewing gum							
Total Importing Countries		7		Highest Unit Value (Tons)			13873 (UAE)
1.	Uzbekistan	3.90	2,397.00	5.	Saudi Arabia	6.40	4,333.00
2.	Pakistan	64.70	2,403.00	6.	United States of America	1.90	6,160.00
3.	China	2.30	2,750.00	7.	UAE	9.50	13,873.00
4.	Türkiye	11.20	3,404.00				

Source: ITC

6.8 Competitiveness and Unit Value Positioning of Pakistan's Export Products in the

Bangladesh Market

The Bangladesh market reflects a regionally integrated but highly competitive structure where Pakistan's position in products with unrealized export potential is mainly concentrated in textile inputs and selected agro-industrial goods, with competitiveness largely shaped by price positioning within established supply chains.

In cotton fabrics and textile intermediates such as woven cotton fabrics (520932, 520912, 520922, 520939, 521132, 521021), Pakistan maintains a visible export presence across multiple product lines. However, unit value comparisons indicate stronger positioning by regional competitors such as China and India in several categories, particularly in higher-value fabric segments, suggesting differentiated pricing and quality tiers within Bangladesh's textile import structure.

In agro-based and basic commodities such as maize (100590) and semi-milled rice (100630), Pakistan participates in a relatively narrow import structure with limited pricing variation, reflecting a cost-competitive position in staple goods. Similarly, in cement clinker (252310), Indonesia and other Asian suppliers dominate higher-volume segments, while Pakistan's participation remains moderate in a price-sensitive industrial input category.

In fresh onions (070310), Bangladesh's import structure is highly concentrated, with India as the dominant supplier and Pakistan maintaining a marginal share, indicating strong regional competition and limited diversification in horticultural exports.

Overall, the Bangladesh market reflects a tightly integrated regional supply structure where Pakistan remains competitive in selected textile and agro-based segments but operates largely within price-driven tiers. The comparison suggests that while existing export channels are established, expanding into higher-value fabric categories and improving positioning relative to regional competitors remains central to realising untapped export potential.

Table 6.8 Unit Value Positioning of Pakistan's Export Products in the Bangladesh Market

S.No	Importing Countries	Share in Bangladeshi imports	Unit Value (Tons)	S.No	Importing Countries	Share in Bangladeshi imports	Unit Value (Tons)
520932 Woven fabrics of cotton (>85%, >200 g/m²)							
Total Importing Countries		9		Highest Unit Value (Tons)			12,679 (Thailand)
1.	India	10.70	1,719.00	6.	Hong Kong, China	0.10	8,720.00
2.	China	53.40	5,758.00	7.	Viet Nam	3.20	10,346.00
3.	Pakistan	30.30	6,233.00	8.	Korea, Republic of	0.20	11,870.00
4.	Japan	0.40	6,865.00	9.	Thailand	1.30	12,679.00
5.	Türkiye	0.30	8,096.00				
252310 Cement clinkers							
Total Importing Countries		8		Highest Unit Value (Tons)			102 (Malaysia)
1.	Korea	1.80	24.00	5.	Saudi Arabia	0.30	31.00
2.	Japan	1.40	24.00	6.	Thailand	15.70	33.00
3.	Indonesia	39.30	28.00	7.	Viet Nam	32.40	68.00
4.	Pakistan	9.00	29.00	8.	Malaysia	0.10	102.00
520912 Woven fabrics of cotton (>85%, >200 g/m²)							
Total Importing Countries		5		Highest Unit Value (Tons)			17,500 (Japan)
1.	India	79.80	725.00	4.	China	11.40	5,709.00
2.	Pakistan	8.60	3,747.00	5.	Japan	0.10	17,500.00
3.	Sri Lanka	0.10	5,455.00				

S.No	Importing Countries	Share in Bangladeshi imports	Unit Value (Tons)	S.No	Importing Countries	Share in Bangladeshi imports	Unit Value (Tons)
100630 Semi-milled rice							
Total Importing Countries		5		Highest Unit Value (Tons)			1,276 (Pakistan)
1.	Korea	4.80	276.00	4.	Viet Nam	0.50	1,246.00
2.	India	90.00	450.00	5.	Pakistan	0.70	1,276.00
3.	United States of America	4.00	726.00				
520922 Woven fabrics of cotton (>85%, >200 g/m²)							
Total Importing Countries		9		Highest Unit Value (Tons)			18,667 (Indonesia)
1.	India	27.20	1,440.00	6.	Türkiye	1.50	7,362.00
2.	Sri Lanka	1.00	5,850.00	7.	Viet Nam	3.50	8,142.00
3.	China	36.40	6,100.00	8.	Thailand	1.30	8,145.00
4.	Pakistan	26.10	6,714.00	9.	Indonesia	0.30	18,667.00
5.	Hong Kong, China	2.70	6,934.00				
520939 Woven fabrics of cotton dyed							
Total Importing Countries		7		Highest Unit Value (Tons)			20,347 (Italy)
1.	India	2.70	2,086.00	5.	Viet Nam	0.10	13,688.00
2.	China	89.80	5,564.00	6.	Germany	0.10	18,000.00
3.	Pakistan	5.10	7,416.00	7.	Italy	1.80	20,347.00
4.	Türkiye	0.40	13,121.00				
100590 Maize							
Total Importing Countries		4		Highest Unit Value (Tons)			259 (India)
1.	Argentina	4.70	182.00	3.	Pakistan	4.70	250.00
2.	Brazil	89.70	197.00	4.	India	1.00	259.00
521132 Woven fabrics (<85% cotton)							
Total Importing Countries		11		Highest Unit Value (Tons)			21,700 (Belgium)
1.	India	4.00	1,813.00	7.	Japan	0.10	10,875.00
2.	Singapore	0.50	4,000.00	8.	Malaysia	4.90	12,628.00
3.	China	65.70	5,959.00	9.	Viet Nam	12.80	12,937.00
4.	Pakistan	7.60	8,502.00	10.	United Kingdom	0.00	13,667.00
5.	Türkiye	0.10	9,615.00	11.	Taipei, Chinese	0.10	18,750.00
6.	Korea, Republic of	4.00	9,681.00				
070310 Fresh onions							
Total Importing Countries		7		Highest Unit Value (Tons)			839 (Egypt)
1.	Türkiye	0.10	268.00	5.	Pakistan	1.70	466.00
2.	China	0.20	297.00	6.	Netherlands	0.10	543.00
3.	Myanmar	0.40	327.00	7.	Egypt	1.10	839.00
4.	India	96.30	447.00				
521021 Plain woven fabrics (<85% cotton)							
Total Importing Countries		7		Highest Unit Value (Tons)			10,012 (China)
1.	India	3.20	1,002.00	5.	Malaysia	4.70	9,455.00
2.	Singapore	0.10	1,600.00	6.	Indonesia	3.80	9,509.00
3.	Pakistan	2.20	4,257.00	7.	China	84.10	10,012.00
4.	Viet Nam	1.80	7,903.00				

Source: ITC

COMPETITIVENESS ANALYSIS OF PAKISTAN'S EXPORT DIVERSIFICATION PRODUCTS IN INTERNATIONAL MARKETS



Chapter 7

COMPETITIVENESS ANALYSIS OF PAKISTAN'S EXPORT DIVERSIFICATION PRODUCTS IN INTERNATIONAL MARKETS

This chapter presents a comparative assessment of selected high-potential export products in major international markets by analyzing import demand patterns, supplier structures, and unit value distributions across competing exporting countries. The analysis focuses on identifying competitive positioning within each product-market combination by examining both market share and unit value variations among suppliers.

Products are arranged in relation to ascending unit values to distinguish between low-cost mass suppliers and higher-value niche or differentiated exporters. Lower unit values typically reflect strong price competitiveness and efficiency in large-scale production, whereas higher unit values often indicate quality differentiation, branding, product specialization, or value-added processing.

By combining import concentration patterns with unit value benchmarking, the analysis provides a structured understanding of market competitiveness and segmentation. This enables the identification of realistic export entry conditions, highlighting both competitive pressure from established suppliers and potential opportunities in higher-value market segments.

7.1 USA Market – Competitiveness Analysis of Selected Products

The United States import market for the selected high-potential products is characterized by strong supplier concentration in a limited number of Asian economies, particularly China, India, Türkiye, Indonesia, and Viet Nam. These countries dominate multiple product categories, indicating well-established supply chains and high entry barriers in standardized segments.

In textile and household products such as carpets and coir floor coverings, competition is concentrated in low-unit-value, price-driven segments led by Asian exporters, while limited higher-unit-value niches are served by European and other developed-country suppliers.

In processed consumer goods such as prepared tuna and cinnamon, the market shows moderate diversification with a clear segmentation between bulk suppliers and higher-value specialty products.

In industrial and differentiated goods such as castor oil, footwear, and human hair wigs, supply is highly concentrated, though unit value variation indicates segmented markets with both low-cost and niche high-value segments.

In paper-based and light manufacturing products such as notebooks, volume supply is dominated by China and Viet Nam, while higher-value segments reflect premium positioning by developed-country exporters.

Overall, the market reflects a dual structure of strong price-based competition in standardized goods and limited but viable higher-value niches where differentiation, quality, and specialization determine entry conditions.

Table 7.1 Competitiveness Analysis of Pakistan's Export Diversification Products in USA

S.No	Importing Countries	Share in USA imports	Unit Value (Tons)	S.No	Importing Countries	Share in USA imports	Unit Value (Tons)
151530 Castor oil							
Total Importing Countries		8		Highest Unit Value (Tons)			12,000 (Haiti)
1.	India	96.60	1,869.00	5.	France	0.10	4,389.00
2.	Brazil	0.10	2,320.00	6.	United Kingdom	0.10	5,111.00
3.	Germany	0.50	2,995.00	7.	Canada	2.00	7,023.00
4.	China	0.40	3,056.00	8.	Haiti	0.10	12,000.00
670420 Wigs of human hair							
Total Importing Countries		13		Highest Unit Value (Tons)			174 (Ghana)
1.	Korea, Republic of	0.10	1.21	6.	Cambodia	0.10	41.00
2.	Indonesia	7.50	1.63	7.	Viet Nam	2.00	63.00
3.	Bangladesh	1.60	13.00	8.	Italy	1.10	69.00
4.	China	85.90	21.00	9.	Austria	0.20	103.00
5.	Hong Kong, China	0.10	27.00	10.	India	0.10	119.00
570242 Carpets							
Total Importing Countries		11		Highest Unit Value (Tons)			23,200 (Spain)
1.	Indonesia	0.20	2,971.00	6.	Egypt	8.40	4,268.00
2.	Viet Nam	0.10	3,803.00	7.	India	6.50	5,088.00
3.	China	7.60	3,864.00	8.	Belgium	2.70	5,755.00
4.	Germany	0.10	3,896.00	9.	Canada	0.20	8,100.00
5.	Türkiye	74.00	4,029.00	10.	Denmark	0.10	10,872.00
090611 Cinnamon							
Total Importing Countries		14		Highest Unit Value (Tons)			19,600 (Pakistan)
1.	Indonesia	23.80	4,583.00	6.	Madagascar	0.70	6,132.00
2.	Viet Nam	26.00	4,842.00	7.	Dominican Republic	0.10	6,818.00
3.	Türkiye	1.60	4,871.00	8.	Bangladesh	0.10	7,167.00
4.	China	1.00	4,915.00	9.	Thailand	0.10	7,444.00
5.	Mexico	0.40	5,068.00	10.	India	3.80	7,646.00
482010 Registers, notebooks							
Total Importing Countries		25		Highest Unit Value (Tons)			9.93 (Austria)
1.	Sri Lanka	0.80	0.46	6.	China	34.50	0.82
2.	India	11.50	0.47	7.	Malaysia	1.40	1.01
3.	Brazil	1.50	0.49	8.	Viet Nam	29.70	1.02
4.	Indonesia	1.40	0.49	9.	Hong Kong, China	0.30	1.13
5.	Colombia	1.10	0.49	10.	Taipei, Chinese	2.50	1.40
640291 Footwear covering the ankle							
Total Importing Countries		19		Highest Unit Value (Tons)			179 (France)
1.	Canada	0.10	0.56	6.	Cambodia	2.20	13.00
2.	China	76.30	9.81	7.	India	1.00	14.00
3.	Bangladesh	0.10	11.00	8.	Indonesia	3.50	15.00
4.	Myanmar	0.10	12.00	9.	Thailand	0.50	16.00
5.	Cambodia	2.20	13.00	10.	Romania	0.30	17.00
160414 Prepared or preserved tunas							
Total Importing Countries		19		Highest Unit Value (Tons)			7,532 (Portugal)
1.	Cabo Verde	0.20	3,274.00	6.	Philippines	1.80	4,425.00
2.	Italy	0.30	3,461.00	7.	Mexico	6.50	4,520.00
3.	El Salvador	0.10	3,545.00	8.	Indonesia	4.20	4,700.00
4.	Spain	0.60	3,547.00	9.	Costa Rica	1.80	4,747.00
5.	China	0.10	3,635.00	10.	Thailand	47.30	4,781.00

S.No	Importing Countries	Share in USA imports	Unit Value (Tons)	S.No	Importing Countries	Share in USA imports	Unit Value (Tons)
570220 Floor coverings (coir)							
Total Importing Countries		8		Highest Unit Value (Tons)		6,800 (Türkiye)	
1.	Viet Nam	0.30	871.00	5.	Sri Lanka	0.10	5,200.00
2.	India	95.50	1,796.00	6.	Italy	0.10	6,200.00
3.	China	1.00	3,364.00	7.	United Kingdom	0.10	6,500.00
4.	Netherlands	1.80	4,817.00	8.	Türkiye	0.60	6,800.00

Source: ITC

7.2 China Market – Competitiveness Analysis of Selected Products

The Chinese import structure for the selected products reflects a highly concentrated and regionally integrated supplier network, dominated mainly by Asian economies such as Indonesia, India, Vietnam, Bangladesh, Myanmar, Thailand, and Malaysia. These countries collectively account for most import shares, indicating that China's sourcing is strongly embedded in regional production chains rather than globally diversified supply systems.

Across several product lines, supplier concentration is pronounced, with clear dominance by a single country or a small group of exporters. Indonesia leads in ferro-nickel and rubber-related products, India dominates castor oil and groundnut oil, while Bangladesh fully controls jute yarn supply. This shows that entry is constrained by established regional suppliers with strong market positioning and long-term trade linkages.

At the same time, the presence of multiple suppliers within most categories indicates a structured oligopolistic market rather than pure monopoly conditions. Unit value differences across countries further confirm a dual-tier structure, where low-cost bulk suppliers coexist with higher-value niche exporters such as Japan, Finland, and the Dominican Republic.

Overall, China's import markets are regionally concentrated and competitively segmented, where entry barriers are high due to entrenched Asian suppliers, but not absolute due to the presence of differentiated price and quality segments within the same product categories.

Table 7.2 Competitiveness Analysis of Pakistan's Export Diversification Products in China

S.No	Importing Countries	Share in China's imports	Unit Value (Tons)	S.No	Importing Countries	Share in China's imports	Unit Value (Tons)
750120 Nickel oxide sinters and intermediate nickel products							
Total Importing Countries		8		Highest Unit Value (Tons)		10,389 (Cuba)	
1.	Congo	0.10	2,615.00	5.	Indonesia	78.10	3,602.00
2.	Türkiye	2.10	3,083.00	6.	Papua New Guinea	8.10	3,626.00
3.	Australia	1.00	3,260.00	7.	Finland	4.40	6,866.00
4.	New Caledonia	5.20	3,280.00	8.	Cuba	1.00	10,389.00
151530 Castor oil							
Total Importing Countries		3		Highest Unit Value (Tons)		3,376 (Japan)	
1.	India	99.60	1,490.00	3.	Japan	0.10	3,376.00
2.	Thailand	0.20	1,862.00				
720260 Ferro-nickel							
Total Importing Countries		8		Highest Unit Value (Tons)		8,825 (Dominican Republic)	
1.	Indonesia	91.50	1,487.00	5.	Korea	2.00	4,288.00
2.	New Caledonia	2.40	3,062.00	6.	Malaysia	0.10	5,352.00
3.	Brazil	1.00	3,556.00	7.	Macedonia	0.20	7,629.00
4.	Colombia	2.10	3,772.00	8.	Dominican Republic	0.60	8,825.00

S.No	Importing Countries	Share in China's imports	Unit Value (Tons)	S.No	Importing Countries	Share in China's imports	Unit Value (Tons)
530710 Single yarn of jute							
Total Importing Countries		1		Highest Unit Value (Tons)			791 (Bangladesh)
1.	Bangladesh	100.00	791.00				
071331 Dried beans (Vigna mungo / radiata)							
Total Importing Countries		6		Highest Unit Value (Tons)			1,051 (Ethiopia)
1.	Thailand	2.40	684.00	4.	Australia	12.80	857.00
2.	Myanmar	47.50	696.00	5.	Indonesia	7.20	935.00
3.	Uzbekistan	19.20	849.00	6.	Ethiopia	10.80	1,051.00
150810 Crude groundnut oil							
Total Importing Countries		10		Highest Unit Value (Tons)			2,577 (USA)
1.	Senegal	0.30	1,504.00	6.	Nicaragua	0.80	1,864.00
2.	Nigeria	1.00	1,687.00	7.	Viet Nam	1.90	1,889.00
3.	India	77.40	1,701.00	8.	Mali	0.10	1,986.00
4.	Brazil	12.90	1,740.00	9.	USA	0.10	2,577.00
5.	Argentina	5.40	1,775.00				
400280 Natural rubber mixtures							
Total Importing Countries		8		Highest Unit Value (Tons)			1,927 (Indonesia)
1.	Lao People's Democratic Republic	3.20	1,529.00	5.	Viet Nam	35.00	1,680.00
2.	Philippines	0.50	1,591.00	6.	Thailand	41.90	1,720.00
3.	Myanmar	4.50	1,593.00	7.	Cambodia	0.60	1,912.00
4.	Malaysia	13.40	1,660.00	8.	Indonesia	0.80	1,927.00
520614 Single cotton yarn (<85% cotton)							
Total Importing Countries		3		Highest Unit Value (Tons)			7,500 (Japan)
1.	Viet Nam	98.10	2,394.00	3.	Japan	0.10	7,500.00
2.	Indonesia	1.80	2,460.00				
530720 Multiple yarn of jute							
Total Importing Countries		2		Highest Unit Value (Tons)			5,200 (Japan)
1.	Bangladesh	99.60	815.00	2.	Japan	0.40	5,200.00
230500 Oilcake residues							
Total Importing Countries		1		Highest Unit Value (Tons)			520 (Sudan)
1.	Sudan	100.00	520.00				

Source: ITC

7.3 The UK Market – Competitiveness Analysis of Selected Products

The UK import structure for selected products shows a mixed market configuration, combining high concentration in manufactured goods with more diversified sourcing in agro-based and intermediate products. Overall supply is largely dominated by China, India, Indonesia, and selected European economies, indicating a strong but segmented competitive environment.

In manufactured goods such as footwear, safety footwear, wigs, and notebooks, China holds a dominant position, often supplying the majority share, with limited secondary participation from other Asian exporters. This reflects a highly concentrated, China-led structure, where scale and cost advantages create strong entry barriers.

In contrast, agro-based products such as castor oil, lentils, cinnamon, and seafood show a more diversified supplier base, with India, Canada, Vietnam, and Thailand sharing market space, although individual countries still maintain leadership in specific products. This indicates comparatively lower concentration and more competitive sourcing.

Unit value differences across most categories confirm a segmented market structure, where low-cost mass suppliers coexist with higher-value niche exporters, reflecting both price-based and quality-based competition.

Overall, the UK market is hybrid in structure, with high concentration in industrial/manufactured goods and moderate diversification in agro-based products, leading to strong entry barriers in China-dominated segments but relatively more flexible entry conditions in diversified categories.

Table 7.3 Competitiveness Analysis of Pakistan's Export Diversification Products in the UK

S.No	Importing Countries	Share in UK's imports	Unit Value (Tons)	S.No	Importing Countries	Share in UK's imports	Unit Value (Tons)
160414 Prepared or preserved tunas							
Total Importing Countries		18		Highest Unit Value (Tons)			45500 (Denmark)
1.	Philippines	7.50	4,373.00	6.	Mauritius	14.00	5,363.00
2.	El Salvador	0.10	4,431.00	7.	France	0.10	5,726.00
3.	Peru	5.70	4,467.00	8.	Portugal	1.80	5,867.00
4.	Indonesia	2.40	4,604.00	9.	Thailand	6.30	5,966.00
5.	Ireland	0.20	4,616.00	10.	Seychelles	11.70	6,081.00
151530 Castor oil							
Total Importing Countries		8		Highest Unit Value (Tons)			26000 (Canada)
1.	India	94.90	1,745.00	6.	Spain	0.70	5,857.00
2.	Germany	0.30	2,667.00	7.	USA	0.60	10,100.00
3.	China	1.40	2,869.00	8.	Canada	0.90	11,000.00
4.	Belgium	0.50	3,346.00				
5.	Netherlands	0.40	4,294.00				
482010 Registers, notebooks							
Total Importing Countries		27		Highest Unit Value (Tons)			20983 (Netherlands)
1.	Egypt	0.20	2,158.00	6.	Korea	0.50	3,155.00
2.	India	12.40	2,266.00	7.	China	64.30	3,400.00
3.	Estonia	1.00	2,491.00	8.	Germany	1.50	3,889.00
4.	Lithuania	0.10	2,564.00	9.	Poland	1.90	4,635.00
5.	Malaysia	2.20	2,776.00	10.	France	1.50	5,364.00
750120 Nickel oxide sinters							
Total Importing Countries		5		Highest Unit Value (Tons)			13063 (Canada)
1.	Japan	10.20	7,946.00	4.	China	0.10	12,975.00
2.	Indonesia	86.00	8,290.00	5.	Canada	3.60	13,063.00
3.	Ukraine	0.10	8,871.00				
640291 Footwear covering the ankle							
Total Importing Countries		25		Highest Unit Value (Tons)			66077 (Thailand)
1.	Türkiye	1.00	11,131.00	6.	Ireland	1.00	14,904.00
2.	Bangladesh	1.20	12,000.00	7.	Indonesia	2.00	16,245.00
3.	China	77.40	12,565.00	8.	Germany	0.50	17,233.00
4.	Myanmar	1.60	13,977.00	9.	Lao PDR	0.20	19,833.00
5.	India	1.30	14,407.00	10.	Brazil	0.10	21,250.00
670420 Wigs of human hair							
Total Importing Countries		5		Highest Unit Value (Tons)			303602 (China)
1.	Indonesia	7.80	38,375.00	4.	UK	0.20	178,000.00
2.	USA	0.70	78,286.00	5.	China	89.60	303,602.00
3.	Bangladesh	0.10	85,000.00				
071340 Dried lentils							
Total Importing Countries		24		Highest Unit Value (Tons)			43750 (Jordan)
1.	Cameroon	0.10	531.00	6.	Venezuela	0.10	974.00
2.	South Africa	0.20	651.00	7.	Kazakhstan	1.20	978.00

S.No	Importing Countries	Share in UK's imports	Unit Value (Tons)	S.No	Importing Countries	Share in UK's imports	Unit Value (Tons)
3.	Ukraine	0.10	651.00	8.	Türkiye	18.10	1,138.00
4.	Nigeria	0.10	735.00	9.	UAE	1.70	1,145.00
5.	Australia	0.20	959.00	10.	Canada	28.00	1,188.00
090611 Cinnamon							
Total Importing Countries		8		Highest Unit Value (Tons)		25000 (Canada)	
1.	Tanzania	1.00	3,143.00	6.	Ireland	0.40	8,000.00
2.	Viet Nam	5.90	3,786.00	7.	Bangladesh	0.60	9,333.00
3.	China	32.20	3,896.00	8.	Indonesia	0.40	10,000.00
4.	India	2.80	4,546.00				
5.	Thailand	0.10	6,000.00				
640340 Footwear with metal toecap							
Total Importing Countries		22		Highest Unit Value (Tons)		166000 (Slovenia)	
1.	Taipei	0.20	11,833.00	6.	Tunisia	0.60	21,630.00
2.	India	2.90	12,150.00	7.	Türkiye	3.30	22,984.00
3.	China	68.60	12,915.00	8.	Indonesia	2.20	24,522.00
4.	Hong Kong	0.10	15,533.00	9.	Bangladesh	1.50	24,892.00
5.	Cambodia	5.20	16,272.00	10.	France	0.10	26,444.00

Source: ITC

7.4 The UAE Market – Competitiveness Analysis of Selected Products

The UAE import structure for the selected products reflects a regionally concentrated but diversified competitive system, where supply is dominated by Asian and emerging economies, particularly India, China, Türkiye, Vietnam, Indonesia, and several African and Latin American exporters. This indicates that UAE sourcing is strongly embedded in global South trade networks with limited dependence on developed-country dominance in volume terms.

Across key products such as footwear, carpets, canned tuna, notebooks, and food commodities, clear supplier concentration is observed, with India, China, and Türkiye often holding the largest shares in their respective categories. In several cases, a single country dominates (e.g., Thailand in tuna, Türkiye in carpets), reflecting established supply-chain control and strong incumbency advantages.

At the same time, the presence of multiple exporting countries in nearly all product categories indicates a multi-supplier oligopolistic structure, where market access is shared among a limited but competitive group of exporters rather than being monopolized.

Unit value variation across products confirms a clear segmentation of the UAE market, with low-cost mass suppliers (India, Indonesia, Tanzania, Vietnam) operating alongside high-value niche exporters (USA, Finland, Belgium, Spain). This reflects a dual-market structure combining price-sensitive bulk imports and differentiated premium segments.

Overall, the UAE market is moderately concentrated and strongly segmented, characterized by dominant Asian supply chains, active inter-regional competition, and relatively flexible entry conditions in diversified supplier markets, particularly in mid-to-high value product segments.

Table 7.4 Competitiveness Analysis of Pakistan's Export Diversification Products in the UAE

S.No	Exporting Countries	Share in UAE imports	Unit Value (USD/Ton)	S.No	Exporting Countries	Share in UAE imports	Unit Value (USD/Ton)
071340 Dried lentils							
Total Importing Countries:			10	Highest Unit Value (USD/Ton)			1,362 (Türkiye)
1.	Venezuela	0.20	559.00	6.	Canada	84.90	942.00
2.	Kazakhstan	1.20	651.00	7.	India	1.90	1,093.00
3.	Spain	0.30	657.00	8.	USA	2.20	1,218.00
4.	Russian	7.20	745.00	9.	Myanmar	0.10	1,357.00
5.	Iraq	1.80	752.00	10.	Türkiye	0.10	1,362.00
151530 Castor oil							
Total Importing Countries:		4		Highest Unit Value (USD/Ton)			10,000 (USA)
1.	India	87.40	1,679.00	3.	Spain	7.20	3,508.00
2.	France	3.10	2,657.00	4.	USA	2.30	10,000.00
090611 Cinnamon							
Total Importing Countries:		5		Highest Unit Value (USD/Ton)			7,348 (Sri Lanka)
1.	China	56.10	1,991.00	4.	Indonesia	0.70	5,067.00
2.	Viet Nam	37.00	3,199.00	5.	Sri Lanka	5.60	7,348.00
3.	India	0.50	3,647.00				
570242 Carpets (man-made textiles)							
Total Importing Countries:		10		Highest Unit Value (USD/Ton)			37,000 (USA)
1.	Syrian	0.10	1,697.00	6.	France	0.10	3,176.00
2.	Iran	0.50	1,802.00	7.	Egypt	4.80	3,359.00
3.	China	5.20	1,833.00	8.	Jordan	0.20	4,667.00
4.	Pakistan	0.10	2,094.00	9.	India	1.70	5,919.00
5.	Türkiye	84.30	2,963.00	10.	Belgium	2.60	9,589.00
071331 Dried beans (Vigna spp.)							
Total Importing Countries:		16		Highest Unit Value (USD/Ton)			2,423 (India)
1.	Tanzania	26.10	596.00	6.	Venezuela	31.30	691.00
2.	Mozambique	11.50	601.00	7.	Uganda	0.60	696.00
3.	Ethiopia	1.40	619.00	8.	Brazil	7.10	703.00
4.	Madagascar	3.10	629.00	9.	Afghanistan	0.50	714.00
5.	Indonesia	0.20	683.00	10.	Kenya	1.10	749.00
640220 Footwear (rubber/plastic straps)							
Total Importing Countries:		8		Highest Unit Value (USD/Ton)			49,000 (Cambodia)
1.	India	9.30	4,189.00	5.	Türkiye	0.50	9,875.00
2.	Thailand	3.60	4,541.00	6.	Viet Nam	2.60	20,000.00
3.	Brazil	6.40	9,454.00	7.	Indonesia	0.40	45,333.00
4.	Sri Lanka	0.10	9,500.00	8.	Cambodia	0.10	49,000.00
160414 Prepared or preserved tunas							
Total Importing Countries:		16		Highest Unit Value (USD/Ton)			9,315 (Spain)
1.	India	1.50	2,422.00	6.	Iran	1.00	4,235.00
2.	Philippines	2.20	3,049.00	7.	Solomon Islands	0.10	4,471.00
3.	Thailand	87.70	3,202.00	8.	Oman	0.60	4,793.00
4.	Indonesia	1.50	3,207.00	9.	Ghana	0.10	6,444.00
5.	Viet Nam	0.70	3,823.00	10.	Yemen	1.10	6,951.00
482010 Registers / notebooks							
Total Importing Countries:		30		Highest Unit Value (USD/Ton)			36,000(Netherlands)
1.	Thailand	0.20	503.00	6.	Lithuania	0.20	2,875.00
2.	Indonesia	7.50	1,807.00	7.	Lebanon	0.30	3,346.00
3.	India	10.20	1,955.00	8.	Taipei	0.20	3,615.00
4.	Malaysia	3.60	2,184.00	9.	Portugal	0.80	3,698.00
5.	China	48.70	2,312.00	10.	Viet Nam	0.90	3,946.00

S.No	Exporting Countries	Share in UAE imports	Unit Value (USD/Ton)	S.No	Exporting Countries	Share in UAE imports	Unit Value (USD/Ton)
Product: 640340 Footwear with outer soles of rubber, plastics, leather ...							
Total Importing Countries:		30		Highest Unit Value (USD/Ton)			56,000 (Finland)
1.	India	23.80	4,857.00	6.	Germany	0.20	8,000.00
2.	Ukraine	2.40	5,984.00	7.	Belgium	0.10	9,200.00
3.	China	56.10	6,135.00	8.	UK	0.10	15,800.00
4.	Italy	2.20	6,243.00	9.	Cambodia	1.40	19,106.00
5.	Oman	0.30	7,000.00	10.	Indonesia	0.20	21,000.00

Source: ITC

7.5 Germany Market – Competitiveness Analysis of Selected Products

The German import structure for the selected products reflects a highly diversified but clearly segmented market, where supply is distributed across both European economies and major Asian exporters. Overall, the market is characterized by strong competition combined with differentiated supplier positioning, rather than dominance by a single sourcing region.

In labor-intensive manufactured goods such as footwear, wigs, synthetic hair products, and textiles, China remains the leading supplier, often holding significant market shares, while countries like Bangladesh, Myanmar, India, Türkiye, and Indonesia serve as secondary suppliers. This indicates a China-centric but multi-country competitive structure, where Asian economies collectively dominate cost-driven segments.

In contrast, agro-based and intermediate products such as castor oil, lentils, and cinnamon show a more balanced and diversified supplier base, with India, Türkiye, Canada, the USA, and several EU economies sharing market presence. This reflects lower concentration and more open competition compared to manufactured goods.

Unit value dispersion is particularly pronounced across most categories, confirming a strongly segmented market structure. Low-cost bulk exporters coexist with high-value niche suppliers from Europe and North America, indicating clear differentiation between mass-market and premium segments.

Overall, Germany represents a highly competitive, diversified, and quality-segmented import market, where Asian economies dominate volume-driven trade, while EU and advanced economies occupy higher-value segments. Market entry is therefore competitive but not closed, with scope primarily dependent on product positioning within the existing price-quality hierarchy.

Table 7.5 Competitiveness Analysis of Pakistan's Export Diversification Products in Germany

S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)
151530 Castor oil							
Total Importing Countries			10	Highest Unit Value (USD/Ton)			3,143 (Poland)
1.	India	86.90	1,683.00	6.	Austria	0.10	2,275.00
2.	Belgium	1.70	1,781.00	7.	Slovenia	0.10	2,292.00
3.	Netherlands	4.80	1,906.00	8.	USA	0.30	2,329.00
4.	France	5.40	1,928.00	9.	UK	0.30	3,124.00
5.	Spain	0.30	2,082.00	10.	Poland	0.10	3,143.00
640291 Footwear covering the ankle							
Total Importing Countries			29	Highest Unit Value (USD/Ton)			64,000 (Croatia)
1.	Myanmar	7.00	13,431.00	6.	Pakistan	0.40	19,935.00
2.	Bangladesh	4.00	15,092.00	7.	Hungary	0.30	21,500.00
3.	China	50.70	15,135.00	8.	Cambodia	1.70	23,699.00
4.	India	1.00	17,277.00	9.	Lao PDR	0.10	26,111.00
5.	Türkiye	0.60	18,990.00	10.	Italy	1.90	26,707.00

S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)
160414 Prepared or preserved tunas							
Total Importing Countries			27	Highest Unit Value (USD/Ton)			13,633 (Poland)
1.	Viet Nam	2.90	4,052.00	6.	El Salvador	0.30	4,837.00
2.	Ghana	4.10	4,229.00	7.	Papua New Guinea	20.10	5,116.00
3.	Côte d'Ivoire	0.20	4,607.00	8.	Madagascar	3.40	5,170.00
4.	China	40.70	4,615.00	9.	Peru	1.10	5,312.00
5.	Philippines	10.50	4,711.00	10.	Indonesia	0.40	5,320.00
482010 Registers, notebooks, memorandum pads							
Total Importing Countries			39	Highest Unit Value (USD/Ton)			29,429 (Tunisia)
1.	Türkiye	36.30	1,437.00	6.	Macedonia	0.10	2,581.00
2.	Slovakia	0.30	1,587.00	7.	Estonia	0.40	3,198.00
3.	Sweden	0.20	2,038.00	8.	Indonesia	0.10	3,279.00
4.	Egypt	0.10	2,400.00	9.	Netherlands	3.80	3,593.00
5.	Portugal	0.40	2,528.00	10.	Lithuania	0.10	3,655.00
071340 Dried shelled lentils							
Total Importing Countries			21	Highest Unit Value (USD/Ton)			12,320 (Ireland)
1.	Belgium	0.90	1,008.00	6.	Canada	24.50	1,345.00
2.	Ukraine	0.20	1,076.00	7.	Kazakhstan	2.80	1,422.00
3.	Russian Federation	5.70	1,204.00	8.	Netherlands	4.80	1,512.00
4.	Spain	0.60	1,271.00	9.	Lebanon	0.20	1,595.00
5.	USA	8.10	1,282.00	10.	Czech Republic	4.20	1,687.00
670420 Wigs and articles of human hair							
Total Importing Countries			16	Highest Unit Value (USD/Ton)			4,93,000 (Viet Nam)
1.	Belgium	1.10	2,375.00	6.	France	0.20	111,000.00
2.	Madagascar	43.50	3,370.00	7.	Hong Kong	0.90	160,667.00
3.	Croatia	0.10	26,000.00	8.	UK	0.80	192,000.00
4.	Myanmar	0.10	71,000.00	9.	India	0.40	218,000.00
5.	Switzerland	0.60	103,000.00	10.	Bangladesh	10.40	230,696.00
090611 Cinnamon							
Total Importing Countries			13	Highest Unit Value (USD/Ton)			16,667 (Czech Republic)
1.	Türkiye	68.40	3,087.00	6.	India	2.20	5,692.00
2.	Lebanon	0.10	4,000.00	7.	France	1.70	6,444.00
3.	China	4.00	4,533.00	8.	Netherlands	1.80	6,778.00
4.	Tanzania	1.80	5,083.00	9.	Iran	0.20	7,000.00
5.	Viet Nam	9.30	5,679.00	10.	Austria	2.10	7,100.00
570242 Carpets and floor coverings							
Total Importing Countries			12	Highest Unit Value (USD/Ton)			11,109 (China)
1.	Egypt	4.00	3,216.00	6.	Poland	0.10	5,000.00
2.	Moldova	0.90	3,492.00	7.	Belgium	9.90	6,533.00
3.	Ukraine	1.20	3,663.00	8.	India	3.60	7,198.00
4.	Iran	0.30	4,302.00	9.	Austria	0.20	7,529.00
5.	China	10.10	4,871.00	10.	Netherlands	1.10	7,696.00
640220 Footwear with outer soles and uppers of rubber/plastics							
Total Importing Countries			21	Highest Unit Value (USD/Ton)			1,11,500 (Bosnia)
1.	Brazil	11.40	11,577.00	6.	Switzerland	0.10	19,000.00
2.	Belgium	1.00	14,095.00	7.	Bangladesh	2.30	19,559.00
3.	Türkiye	3.90	14,468.00	8.	Spain	1.70	19,667.00
4.	Senegal	0.30	14,571.00	9.	Netherlands	3.30	19,766.00
5.	Myanmar	2.40	14,804.00	10.	India	0.30	21,000.00

S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Germany's imports (%)	Unit Value (USD/Ton)
670419 False beards, eyelashes and articles of synthetic textile materials							
Total Importing Countries			15	Highest Unit Value (USD/Ton)			2,10,000 (Thailand)
1.	China	39.30	33,561.00	6.	Poland	0.70	56,000.00
2.	Italy	0.30	43,000.00	7.	Belgium	0.20	58,000.00
3.	Canada	0.70	43,600.00	8.	Austria	0.20	63,000.00
4.	Indonesia	17.90	47,103.00	9.	India	0.20	65,000.00
5.	Bangladesh	1.10	54,167.00	10.	Korea	0.60	89,000.00

Source: ITC

7.6 Netherlands Market – Competitiveness Analysis of Selected Products

The Netherlands import structure for the selected products reflects a highly diversified but strongly Asia-driven competitive system, where supply is concentrated among a limited group of developing and emerging economies, particularly China, India, Indonesia, Türkiye, Vietnam, Bangladesh, and several Latin American and African exporters.

Across manufactured goods such as footwear, wigs, notebooks, and textile products, China is the dominant supplier, often holding the largest market share, with India, Bangladesh, Myanmar, and Indonesia acting as secondary suppliers. This indicates a China-led but multi-country competitive hierarchy, where Asian economies collectively dominate cost-driven segments.

In contrast, agro-based and intermediate goods such as lentils, cinnamon, castor oil, and grapes show a more diversified supplier base, with Türkiye, India, Canada, South Africa, and Vietnam sharing significant market presence. This reflects lower concentration and more competitive sourcing conditions compared to manufactured products.

A key feature of the Dutch market is strong unit value dispersion across all product categories, confirming a clear segmentation between low-cost bulk suppliers (India, Indonesia, Türkiye, Bangladesh) and high-value niche exporters (EU countries, USA, Switzerland, and select OECD economies). This supports a dual-tier market structure combining price-based mass trade and quality-driven premium segments.

Overall, the Netherlands represents a highly open, diversified, and segmented import market, with strong Asian dominance in volume terms but significant participation of advanced economies in value-added niches. Market entry is competitive but not restrictive, with feasibility depending on positioning within existing price-quality segments rather than entry barriers alone.

Table 7.6 Competitiveness Analysis of Pakistan's Export Diversification Products in the Netherlands

S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)
151530 Castor oil							
Total Importing Countries			8	Highest Unit Value (USD/Ton)			2,636 (Spain)
1.	India	85.20	1,699.00	5.	Poland	0.40	2,059.00
2.	France	2.00	1,921.00	6.	Belgium	0.70	2,193.00
3.	Germany	11.40	1,926.00	7.	UK	0.10	2,455.00
4.	Italy	0.10	2,000.00	8.	Spain	0.10	2,636.00
160414 Prepared or preserved tunas							
Total Importing Countries			24	Highest Unit Value (USD/Ton)			8,600 (Romania)
1.	Ghana	2.00	4,503.00	6.	Singapore	0.10	4,794.00
2.	Colombia	0.20	4,645.00	7.	Papua New Guinea	5.10	4,976.00
3.	Philippines	18.70	4,657.00	8.	Thailand	1.90	5,007.00
4.	Morocco	0.20	4,689.00	9.	Ecuador	22.40	5,023.00
5.	Viet Nam	1.40	4,721.00	10.	Peru	1.00	5,074.00

S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)
640291 Footwear covering the ankle							
Total Importing Countries		31		Highest Unit Value (USD/Ton)		77,000 (Switzerland)	
1.	Myanmar	1.70	9,162.00	6.	Lao PDR	0.40	15,303.00
2.	Bangladesh	4.00	9,727.00	7.	Thailand	0.10	18,375.00
3.	India	0.40	13,303.00	8.	Spain	2.10	18,598.00
4.	China	25.80	13,336.00	9.	Czech Republic	0.20	19,143.00
5.	Indonesia	0.20	14,889.00	10.	Korea	0.10	19,167.00
090611 Cinnamon							
Total Importing Countries		13		Highest Unit Value (USD/Ton)		64,000 (Belgium)	
1.	Tanzania	3.30	2,615.00	6.	Viet Nam	8.40	4,325.00
2.	Madagascar	4.50	3,680.00	7.	Sri Lanka	32.60	5,349.00
3.	Indonesia	7.60	3,738.00	8.	China	4.00	5,929.00
4.	United Kingdom	23.90	3,890.00	9.	Türkiye	7.10	6,391.00
5.	South Africa	0.20	4,000.00	10.	Italy	0.50	11,000.00
482010 Registers, notebooks, memorandum pads							
Total Importing Countries		27		Highest Unit Value (USD/Ton)		30,256 (USA)	
1.	China	59.40	2,247.00	6.	Taipei	0.20	5,235.00
2.	Lithuania	0.10	2,690.00	7.	Belgium	9.40	5,918.00
3.	Indonesia	0.30	2,822.00	8.	Hong Kong	0.30	6,489.00
4.	Korea	0.20	2,902.00	9.	Austria	0.10	6,591.00
5.	Egypt	0.10	3,000.00	10.	Türkiye	0.30	6,653.00
080610 Fresh grapes							
Total Importing Countries		25		Highest Unit Value (USD/Ton)		3,951 (France)	
1.	Türkiye	0.10	1,631.00	6.	South Africa	27.10	2,294.00
2.	India	11.20	1,767.00	7.	Cyprus	0.10	2,335.00
3.	Morocco	0.10	1,802.00	8.	Greece	1.00	2,604.00
4.	Moldova	0.50	1,965.00	9.	Egypt	4.70	2,611.00
5.	Namibia	4.30	2,238.00	10.	Peru	20.20	2,615.00
071340 Dried shelled lentils							
Total Importing Countries		23		Highest Unit Value (USD/Ton)		2,091 (Denmark)	
1.	USA	0.70	1,075.00	6.	Canada	22.10	1,337.00
2.	Australia	0.10	1,080.00	7.	Kazakhstan	0.20	1,364.00
3.	Israel	0.20	1,146.00	8.	Germany	10.10	1,365.00
4.	Türkiye	29.70	1,182.00	9.	UAE	0.10	1,370.00
5.	Ukraine	0.20	1,308.00	10.	Switzerland	0.20	1,371.00
720260 Ferro-nickel							
Total Importing Countries		11		Highest Unit Value (USD/Ton)		5,704 (Korea)	
1.	Indonesia	21.00	1,582.00	6.	India	6.80	3,503.00
2.	Türkiye	0.10	2,070.00	7.	Germany	0.70	3,818.00
3.	Venezuela	1.60	2,315.00	8.	Dominican Republic	1.30	5,267.00
4.	Colombia	16.20	2,814.00	9.	New Caledonia	0.20	5,404.00
5.	Brazil	51.50	2,985.00	10.	Japan	0.10	5,500.00
750120 Nickel oxide sinters							
Total Importing Countries		7		Highest Unit Value (USD/Ton)		50,600 (India)	
1.	Sweden	9.40	6,195.00	5.	Belgium	1.90	16,396.00
2.	Cuba	77.40	13,858.00	6.	Germany	0.90	17,208.00
3.	Japan	6.20	14,325.00	7.	India	3.30	50,600.00
4.	Canada	0.70	16,000.00				

S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)	S.No	Importing Countries	Share in Netherlands's imports (%)	Unit Value (USD/Ton)
640220 Footwear with rubber/plastic straps							
Total Importing Countries			23	Highest Unit Value (USD/Ton)			82,444 (UK)
1.	Brazil	13.80	5,074.00	6.	China	25.80	10,453.00
2.	Austria	0.20	10,000.00	7.	Poland	2.20	10,500.00
3.	Sweden	1.10	10,333.00	8.	Switzerland	0.40	10,500.00
4.	Greece	0.30	10,333.00	9.	France	2.90	10,537.00
5.	Portugal	11.40	10,451.00	10.	Denmark	0.40	10,778.00

Source: ITC

7.7 Afghanistan Market – Competitiveness Analysis of Selected Products

The Afghanistan import structure for the selected products reflects a highly concentrated, regionally dependent, and supply-restricted market, where sourcing is primarily driven by geographic proximity and logistical accessibility. Key suppliers include Uzbekistan, Kazakhstan, Türkiye, China, and the UAE, indicating a strong reliance on neighboring and regional economies rather than diversified global sourcing networks.

Across most products, imports are either highly concentrated or effectively controlled by one or two suppliers. Wheat flour is dominated by Uzbekistan and Kazakhstan, carpets by Türkiye, while several textile and industrial inputs show near-single-country dependence. Even in relatively diversified items, the supplier base remains narrow and regionally clustered, reflecting a thin and highly concentrated competitive structure.

Unit value variation across products suggests a segmented pricing structure, particularly in footwear and textile-related goods, where higher unit values coexist with low-cost bulk imports. However, this segmentation is constrained within a limited supplier pool, meaning competition occurs among a small set of regional exporters rather than a broad global market.

Overall, Afghanistan represents a highly concentrated and regionally locked import market, where trade is dominated by a few neighboring economies. Market entry barriers are therefore primarily structural, driven by entrenched regional supply chains and limited diversification rather than broad-based global competition.

Table 7.7 Competitiveness Analysis of Pakistan's Export Diversification Products in the Afghanistan

S.No	Importing Countries	Share in Afghanistan imports	Unit Value (Tons)	S.No	Importing Countries	Share in Afghanistan imports	Unit Value (Tons)
110100 Wheat or meslin flour							
Total Importing Countries			4	Highest Unit Value (Tons)			450 (Türkiye)
1.	Kazakhstan	49.40	258.00	3.	Tajikistan	0.10	393.00
2.	Uzbekistan	50.10	288.00	4.	Türkiye	0.30	450.00
570242 Carpets and other floor coverings (man-made, woven)							
Total Importing Countries			4	Highest Unit Value (Tons)			6,000 (UAE)
1.	Kazakhstan	0.20	1,250.00	3.	Uzbekistan	24.10	4,295.00
2.	Türkiye	75.70	2,915.00	4.	UAE	0.10	6,000.00
160414 Prepared or preserved tunas							
Total Importing Countries			3	Highest Unit Value (Tons)			3,667 (UAE)
1.	UAE	73.30	3,667.00				
721420 Bars and rods of iron or steel							
Total Importing Countries			1.00	Highest Unit Value (Tons)			250 (Tajikistan)
1.	Tajikistan	100.00	250.00				
640220 Footwear with outer soles and uppers of rubber/plastics							
Total Importing Countries			3	Highest Unit Value (Tons)			4,600 (Türkiye)
1.	UAE	12.50	395.00	3.	Türkiye	57.50	4,600.00

S.No	Importing Countries	Share in Afghanistan imports	Unit Value (Tons)	S.No	Importing Countries	Share in Afghanistan imports	Unit Value (Tons)
2.	China	30.00	2,769.00				
640291 Footwear covering the ankle							
Total Importing Countries		4		Highest Unit Value (Tons)		25,833 (Uzbekistan)	
1.	India	1.70	4.86	4.	UAE	14.60	12,000.00
2.	China	7.30	10,000.00	5.	Uzbekistan	75.40	25,833.00
540720 Woven fabrics of synthetic filament							
Total Importing Countries		1		Highest Unit Value (Tons)		1,000 (India)	
1.	India	100.00	1,000.00				
090611 Cinnamon (not crushed or ground)							
Total Importing Countries		1		Highest Unit Value (Tons)		3,500 (UAE)	
1.	UAE	100.00	3,500.00				
550932 Acrylic/modacrylic yarn (dataset 1)							
Total Importing Countries		1		Highest Unit Value (Tons)		1,500 (China)	
1.	China	100.00	1,500.00				
550932 Acrylic/modacrylic yarn (dataset 2)							
Total Importing Countries		2		Highest Unit Value (Tons)		1,376 (UAE)	
1.	UAE	99.60	1,376.00				

Source: ITC

7.8 Bangladesh Market – Competitiveness Analysis of Selected Products

The Bangladesh import structure for the selected products reflects a highly concentrated and Asia-centric supply network, broadly consistent with other markets, where imports are dominated by a limited group of regional exporters—particularly China, India, and Viet Nam—alongside selective participation from Indonesia, Thailand, and a few OECD-linked suppliers. This confirms a regionally integrated sourcing pattern, similar to the structures observed in other countries, but with even stronger reliance on a narrow supplier base.

Across key categories, supplier concentration is particularly high. In textile and industrial inputs such as woven cotton fabrics, dyed knitted fabrics, acrylic yarn, and reactive dyes, China and India dominate the import structure, often accounting for the overwhelming majority of supply. In fertilizers and agro-based products, China and Morocco hold significant positions, indicating dependence on established large-scale suppliers rather than diversified global sourcing.

Unit value dispersion across products indicates a clear segmentation between low-cost bulk suppliers and higher-value niche exporters, consistent with patterns observed in other markets such as the UK, UAE, and Netherlands. China, India, and Indonesia primarily occupy volume-driven, lower unit-value segments, while higher unit-value contributions from countries such as Italy, Switzerland, Sri Lanka, and Viet Nam reflect specialized or premium product positioning.

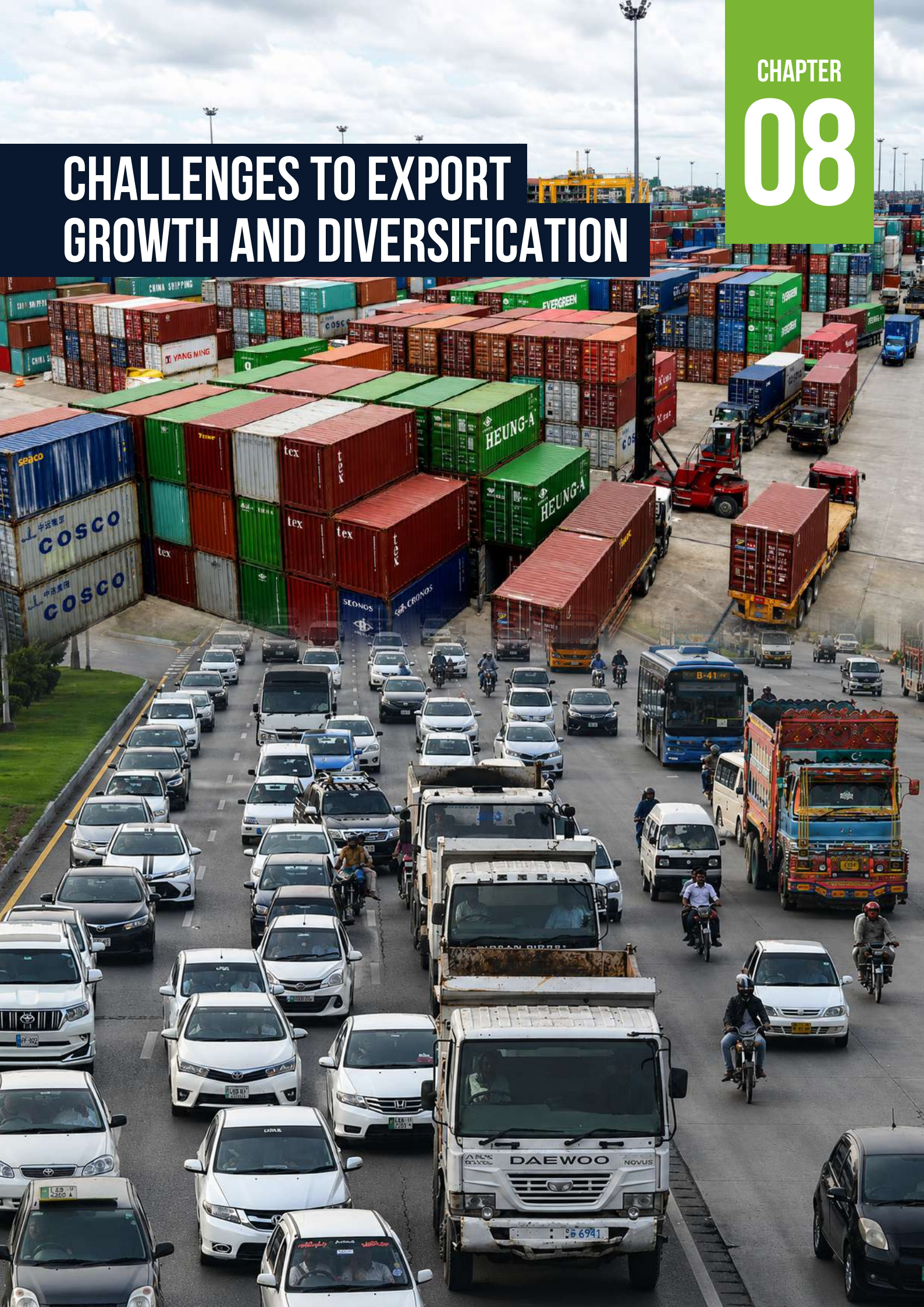
Overall, Bangladesh exhibits a highly concentrated and regionally aligned import structure, similar to other developing and emerging markets in the dataset, where Asian economies dominate supply chains. However, dependence is relatively stronger and supplier diversity lower, resulting in a more constrained but clearly segmented market structure, with entry conditions shaped by entrenched regional dominance and limited sourcing alternatives.

Table 7.8 Competitiveness Analysis of Pakistan's Export Diversification Products in Bangladesh

S.No	Importing Countries	Share in Bangladesh imports	Unit Value (Tons)	S.No	Importing Countries	Share in Bangladesh imports	Unit Value (Tons)
071340 Dried, shelled lentils							
	Total Importing Countries	3			Highest Unit Value (Tons)		889 (India)
1.00	Australia	60.40	615.00	3.00	India	21.50	889.00
2.00	Canada	18.10	628.00				
071331 Dried beans (Vigna mungo / radiata)							
	Total Importing Countries	4			Highest Unit Value (Tons)		1,003 (India)
1.00	Tanzania, United Republic of	7.70	500.00	4.00	Myanmar	6.60	701.00
2.00	Kenya	0.30	592.00	5.00	India	82.20	1,003.00
3.00	Mozambique	3.30	630.00				
520614 Single cotton yarn (<85% cotton)							
	Total Importing Countries	3			Highest Unit Value (Tons)		7,182 (China)
1.00	India	40.50	2,887.00	3.00	China	3.60	7,182.00
2.00	Viet Nam	56.00	3,640.00				
310530 Diammonium phosphate							
	Total Importing Countries	3			Highest Unit Value (Tons)		581 (China)
1.00	Morocco	31.10	526.00	3.00	China	46.70	581.00
2.00	Saudi Arabia	22.30	576.00				
550932 Acrylic/modacrylic yarn							
	Total Importing Countries	6			Highest Unit Value (Tons)		5,414 (Viet Nam)
1.00	India	2.10	2,342.00	4.00	Indonesia	22.40	2,486.00
2.00	Thailand	2.20	2,386.00	5.00	China	71.90	2,818.00
3.00	Hong Kong, China	0.10	2,478.00	6.00	Viet Nam	1.30	5,414.00
600642 Dyed knitted fabrics (artificial fibres)							
	Total Importing Countries	8			Highest Unit Value (Tons)		53,000 (Sri Lanka)
1.00	India	0.20	4,844.00	5.00	Germany	0.10	11,400.00
2.00	China	96.60	5,275.00	6.00	Taipei	0.30	11,882.00
3.00	Hong Kong, China	0.50	8,865.00	7.00	Korea	1.90	15,423.00
4.00	Viet Nam	0.20	10,700.00	8.00	Sri Lanka	0.10	53,000.00
320416 Synthetic organic reactive dyes							
	Total Importing Countries	12			Highest Unit Value (Tons)		19,500 (Italy)
1.00	India	52.30	3,151.00	7.00	Malaysia	0.20	9,612.00
2.00	China	8.30	4,477.00	8.00	Türkiye	0.60	10,164.00
3.00	Taipei, Chinese	1.20	4,774.00	9.00	Singapore	21.50	10,907.00
4.00	Indonesia	1.80	5,430.00	10.00	Sri Lanka	0.60	11,362.00
5.00	Thailand	1.10	6,082.00	11.00	Switzerland	1.20	15,597.00
6.00	Korea, Republic of	11.10	6,429.00	12.00	Italy	0.10	19,500.00
521041 Plain woven cotton fabrics (<85% cotton)							
	Total Importing Countries	4			Highest Unit Value (Tons)		16,013 (Viet Nam)
1.00	India	6.50	1,474.00	3.00	Thailand	0.20	12,000.00
2.00	China	90.20	9,764.00	4.00	Viet Nam	3.00	16,013.00
521214 Woven cotton fabrics (<85% cotton, other)							
	Total Importing Countries	3			Highest Unit Value (Tons)		28,000 (Viet Nam)
1.00	India	1.00	1,596.00	3.00	Viet Nam	0.10	28,000.00
2.00	China	99.00	12,786.00				
090611 Cinnamon (not crushed or ground)							
	Total Importing Countries	1			Highest Unit Value (Tons)		6,038 (Viet Nam)
1.00	Viet Nam	100.00	6,038.00				

Source: ITC

CHALLENGES TO EXPORT GROWTH AND DIVERSIFICATION



Chapter 8

CHALLENGES TO EXPORT GROWTH AND DIVERSIFICATION

This chapter reviews the key structural, institutional, and macroeconomic constraints identified in the existing literature that hinder Pakistan's export growth and diversification. It synthesizes evidence on major barriers related to infrastructure and logistics, productivity and competitiveness, regulatory and institutional inefficiencies, macroeconomic instability, and political and policy uncertainty. Together, these challenges provide a broader analytical context for understanding why Pakistan's export base remains concentrated and why progress toward diversification and higher value-added exports has been limited.

8.1 Infrastructure and Logistics Constraints to Export Competitiveness

Pakistan's infrastructure and logistics weaknesses continue to constrain export growth and diversification by increasing trade costs, reducing efficiency, and limiting integration into global value chains. Pakistan's logistics sector contributes nearly 15.6% to GDP, significantly higher than the 8–9% observed in developed economies⁴, reflecting the heavy cost burden created by inefficient transport systems, outdated logistics networks, and weak supply chain management. These inefficiencies raise production and transportation costs, making Pakistani exports less competitive in international markets.

Pakistan's Logistics Performance Index (LPI) ranking improved to 68 in 2016 but sharply declined to 122 in 2018, indicating that reforms in the logistics sector remained temporary and unsustainable. The country's absence from the 2023 LPI rankings further reflects weak institutional coordination and poor engagement with international logistics standards, placing Pakistan behind regional competitors such as India, Bangladesh, and Vietnam, which have steadily modernized their logistics ecosystems. Freight transportation in Pakistan also remains highly imbalanced, as approximately 94% of cargo is transported through roads while only 6% moves through railways, despite rail being more cost-efficient and suitable for bulk and long-distance trade. Excessive dependence on road transport increases congestion, fuel consumption, road damage, and delivery times, thereby inflating export costs.

Similarly, port inefficiencies continue to undermine trade facilitation, as Karachi Port and Port Qasim, which handle more than 95% of Pakistan's external trade, operate at only one-third of their installed capacity⁵, while container dwell times remain considerably higher than competing regional ports. Delays at ports increase shipment costs and reduce reliability for exporters, particularly in time-sensitive sectors.

The infrastructure gap is further visible in agriculture and food processing, where Pakistan loses nearly 30–40% of fruits and vegetables after harvest due to inadequate warehousing and cold-chain facilities⁶, limiting export diversification into high-value agricultural products. In addition, weak freight corridors and inadequate transport infrastructure continue to constrain the export potential of sectors such as dimensional stones and other resource-based industries.

Addressing these challenges requires comprehensive infrastructure modernization through railway revitalization, development of dedicated freight corridors, expansion of warehousing and cold-chain systems, modernization of ports, and digitalization of customs and cargo tracking systems. Greater institutional coordination through an integrated logistics authority would also help improve efficiency, reduce trade costs, and strengthen Pakistan's export competitiveness.

4 Federation of Pakistan Chambers of Commerce and Industry (FPCCI), *A Policy Brief on Pakistan's Logistics Performance and Its Impact on Trade Competitiveness* (Karachi: FPCCI, 2025) <https://fpcci.org.pk/wp-content/uploads/2025/10/A-Policy-Brief-on-Pakistans-Logistics-Performance-and-Its-Impact-on-Trade-Competitiveness.pdf>.

5 Ibid

6 Ibid

8.2 Productivity Constraints to Export Growth and Diversification

Pakistan's weak productivity performance continues to act as a fundamental constraint to export growth and diversification, limiting its integration into global markets and weakening its trade competitiveness. Pakistan's economy has been caught in boom-bust cycles for more than five decades, with recurring episodes of high inflation and external account pressures⁷. This persistent macroeconomic instability disrupts export planning, discourages long-term investment in tradable sectors, and constrains the ability of firms to expand export capacity. In recent decades, the frequency of boom-bust cycles has increased with the boom periods getting shorter⁸. As a result, export performance remains volatile and highly vulnerable to external shocks.

A key structural issue is weak competitiveness, which is directly reflected in poor export outcomes and limited global integration. Weak competitiveness is reflected in consistently declining exports (as a percent of GDP), low foreign direct investment (FDI), and insufficient integration with global value chains (GVC)⁹. At the firm level, exporters face low product quality, high unit production costs, and weak branding capacity, which restrict Pakistan's ability to diversify into higher value-added and technology-intensive export markets. Low quality of products, higher unit cost of production, and inability to create brands in international markets constrain competitiveness¹⁰.

Export competitiveness is increasingly driven by productivity rather than short-term cost advantages. Competitiveness has become synonymous with productivity and productivity growth¹¹. However, Pakistan's reliance on cost-based policy instruments does not address underlying structural inefficiencies in the export base. The low road—achieved through subsidies, rebates, and exchange rate undervaluation—can benefit exports in the short to medium term, but is inherently unsustainable compared to productivity-led competitiveness¹². Export-oriented industries have also shown weak efficiency gains, limiting their ability to move into diversified and higher-value global markets. Export-oriented sectors receiving preferential treatment have exhibited weak or negative productivity outcomes in recent periods¹³.

8.3 Regulatory and Institutional Barriers: Ease of Doing Business Constraints on

Export Performance

The ease of doing business in Pakistan remains a structural constraint to export growth and diversification due to regulatory complexity, institutional inefficiencies, and high compliance costs. According to the World Bank's Doing Business 2020 report (published in 2019), Pakistan was ranked 108 out of 190 economies¹⁴, reflecting persistent weaknesses in regulatory efficiency and business facilitation.

Starting and operating a business involves multiple procedures and institutional interactions. Business registration requires coordination with the Securities and Exchange Commission of Pakistan (SECP) for incorporation and the Federal Board of Revenue (FBR) for tax registration (NTN)¹⁵, along with other provincial and local approvals. The World Bank reports that starting a business in Pakistan involves 5 procedures, takes around 16.5 days, and costs approximately 6.7% of income per capita¹⁶, indicating a moderate but still burdensome entry environment for new firms, particularly SMEs engaged in export activities.

These procedural and compliance burdens contribute to informality, as many small firms avoid formal registration due to high administrative requirements and costs, limiting their access to export facilitation, financing, and government support

7 State Bank of Pakistan, Pakistan's Low Competitiveness: A Case for Investing in Productivity, Chapter 6 in The State of Pakistan's Economy: Half Year Report 2024–25 (Karachi: SBP, 2025), available at <https://www.sbp.org.pk/reports/half/arFY25/Chap-6.pdf>.

8 Ibid.

9 Ibid.

10 Ibid.

11 Ibid.

12 Ibid.

13 Ibid.

14 LUMS Centre for Entrepreneurship, *Ease of Doing Business in Pakistan* (2024), available at: <https://lce.lums.edu.pk/wp-content/uploads/2024/10/Ease-of-doing-business-report.pdf>

15 Ibid.

16 Ibid.

mechanisms. Macroeconomic instability further compounds these challenges, with inflation recorded at 28.3% (CPI, January 2024) and unemployment at 7% (2023)¹⁷, increasing uncertainty and raising the cost of doing business for export-oriented firms.

Financial constraints also remain severe, restricting export expansion and upgrading. It is estimated that only 2.4% of the population has access to formal credit, while around 100 million adults remain unbanked¹⁸, limiting firms' ability to invest in capacity expansion, technology upgrading, and compliance with international standards required for export diversification.

Although reforms such as online registration systems, tax e-filing, and the WEOC customs platform have improved administrative efficiency, implementation remains uneven and institutional coordination weak. Governance challenges further affect the business environment, as reflected in Pakistan's ranking of 133 out of 180 countries in the Corruption Perceptions Index (2023)¹⁹, which highlights concerns regarding transparency, regulatory enforcement, and transaction costs.

While Pakistan has undertaken incremental reforms in business regulation and digitalization, persistent institutional inefficiencies, financial constraints, and governance challenges continue to increase the cost of doing business. These factors collectively reduce export competitiveness by limiting efficiency, predictability, and the ability of firms to scale and diversify into higher-value international markets.

8.4 Macroeconomic Instability: A Constraint on Export Performance

Pakistan's persistent macroeconomic instability continues to undermine export performance by increasing uncertainty in trade, production, and investment decisions. Chronic twin deficits in the fiscal and external accounts have repeatedly generated pressure on foreign exchange reserves and the exchange rate, weakening the country's external position and reducing exporters' confidence. Pakistan's trade deficit increased by nearly 36% in H1-FY26 due to worsening terms of trade and diverging import-export trends, while exports declined mainly because of lower rice exports²⁰.

The pressure on the external account has historically increased dependence on remittances, external borrowing, IMF support, and other financial inflows to stabilize reserves and maintain exchange rate stability. Exchange rate volatility further raises the cost of imported machinery, fuel, and industrial inputs, increasing production uncertainty and reducing the international competitiveness of export-oriented industries.

Macroeconomic pressures have intensified further due to inflationary shocks, higher interest rates, and global geopolitical uncertainty. The ongoing Middle East conflict since February 2026 has increased risks to inflation, trade flows, remittances, and economic activity through rising international oil prices and supply chain disruptions²¹. Higher oil prices directly raise energy, transportation, and logistics costs, while supply disruptions increase imported inflation across the economy.

In response to inflationary pressures, tighter monetary policy and higher interest rates increase the cost of borrowing for businesses, discourage industrial investment, and constrain expansion in export-oriented sectors. Similarly, lower global commodity prices, rising international competition, and closure of the western border negatively affected Pakistan's exports, particularly food exports²². These combined pressures reduce industrial competitiveness, weaken export profitability, and limit Pakistan's ability to diversify into higher value-added and technology-intensive export markets.

17 Ibid.

18 Ibid.

19 Ibid.

20 State Bank of Pakistan, *Half Year Report 2025-26: The State of Pakistan's Economy*, available at: https://www.sbp.org.pk/reports/half/arFY26/Half-Year-Report-2025-26_Consolidated.pdf

21 Ibid.

22 Ibid.

8.5 Political Instability and Policy Inconsistency: Constraints on Export Performance

Political instability and policy inconsistency remain key structural constraints on Pakistan's export performance by weakening policy credibility, increasing uncertainty, and reducing the effectiveness of trade and industrial policies. A stable policy environment is essential for export-oriented investment, yet Pakistan's repeated shifts between policy regimes have undermined continuity in long-term export planning and industrial development strategies. The World Bank identifies policy uncertainty, weak institutional capacity, and an unstable business environment as major constraints to Pakistan's export performance and competitiveness (World Bank, 2025). Firms in Pakistan consistently report political instability as a key constraint to business operations, along with regulatory uncertainty and trade policy unpredictability (World Bank Enterprise Survey, 2025).

Political instability also reduces trade competitiveness by increasing uncertainty in exchange rates, investment decisions, and contract enforcement, making export planning more difficult for firms engaged in global markets. Empirical evidence shows that political instability and governance weaknesses negatively affect export performance through disrupted policy environments, weakened institutions, and reduced investor confidence (WTO Trade Policy Review; Asteriou et al., 2019).

Overall, persistent political instability and inconsistent policy implementation continue to hinder Pakistan's export diversification by increasing uncertainty, discouraging long-term investment, and weakening the country's integration into global value chains.

KEY FINDINGS

CHAPTER 09



Chapter 9

KEY FINDINGS

This chapter presents a concise synthesis of the main findings from the study. It brings together evidence on export concentration, competitiveness, diversification potential, and structural constraints affecting Pakistan's export performance. The findings highlight key patterns in product and market dependence, revealed competitiveness across destinations, and areas of unrealized export potential, providing an integrated overview of Pakistan's export structure and its implications for diversification and resilience.

Key Findings – Chapter 2: Pakistan's Exports Distribution Overview

1. Pakistan's export structure remains highly concentrated across a limited number of sectors. In 2024, five major sectors—other made-up textile articles, knitted apparel, cereals, non-knitted apparel, and cotton—accounted for approximately 66% of total exports (USD 32.5 billion), indicating strong dependence on a narrow export base dominated by textiles and agricultural commodities.
2. Textile-related sectors dominate Pakistan's export basket, reinforcing sectoral dependence. Textile and apparel products continue to form the backbone of exports, reflecting limited structural transformation toward higher value-added and technology-intensive industries.
3. Product concentration is particularly high within several leading export sectors. In other made-up textile articles, nearly 75–80% of exports are concentrated in five products, primarily bedlinen and household textile items, indicating vulnerability to product-specific demand shocks.
4. The knitted apparel sector shows comparatively greater diversification than other major sectors. Although key product groups account for around 50% of exports, the sector maintains a broader product base, reducing dependence on a single export item relative to other sectors.
5. Non-knitted apparel exports exhibit increasing dependence on a single dominant product category. Men's or boys' cotton ensembles have emerged as the principal export item, accounting for more than half of the sector's exports in recent years, indicating rising product concentration.
6. Cereal exports remain highly dependent on rice-based products. Semi-milled or wholly milled rice consistently dominates cereal exports, accounting for over 65–70% of the sector, reflecting limited diversification into alternative agricultural exports.
7. Pakistan's export destinations are geographically more diversified than its product composition, though reliance on a few markets persists. The United States, China, the United Kingdom, the United Arab Emirates, and Germany collectively account for approximately 40–42% of total exports, suggesting moderate geographical concentration.
8. Export composition varies significantly across destination markets, reflecting market-specific specialization. Exports to the United States and the European Union remain heavily concentrated in textiles and apparel, while exports to China are dominated by primary commodities such as refined copper and cotton yarn.
9. Several regional markets display extreme product concentration. Exports to Indonesia are overwhelmingly dependent on rice (around 77% of exports), while Malaysia, Afghanistan, and Saudi Arabia also exhibit strong reliance on a limited range of agricultural and food products.

10. Bangladesh represents an important market for textile intermediates rather than final goods. Pakistan's exports to Bangladesh are heavily concentrated in denim fabrics, cotton textiles, and yarn, reflecting integration into Bangladesh's garment manufacturing value chain.
11. The export structure exposes Pakistan to elevated external vulnerability. Heavy dependence on a limited set of sectors, products, and destination markets increases susceptibility to global demand fluctuations, price volatility, supply chain disruptions, changing consumer preferences, and external shocks, thereby limiting export resilience and stability.
12. Evidence of export diversification remains limited despite some emerging product variation in selected sectors and markets. While moderate diversification is visible in knitted apparel and selected destination markets, Pakistan's overall export profile remains concentrated and narrowly specialized.
13. Pakistan lags behind regional comparators in export diversification performance. The comparative PDI-EMDI assessment places Pakistan below China, Vietnam, and India in both product and market diversification dimensions. While Pakistan performs marginally better than Bangladesh in product diversification and Indonesia in market diversification, it remains concentrated relative to more diversified export-oriented economies.
14. Most of Pakistan's export sectors across major markets are concentrated in the high-vulnerability quadrant (low PDI-low EMDI). Across the United States, China, the European Union, the United Kingdom, Saudi Arabia, Bangladesh, Indonesia, Japan, and Malaysia, a large concentration of sectors falls in the lower-left quadrant, indicating both weak product diversification and poor alignment with destination-country import demand.
15. Traditional manufacturing sectors consistently exhibit high structural vulnerability across markets. Sectors such as leather goods, carpets and floor coverings, furniture and bedding, plastics, machinery and mechanical appliances, electrical machinery, toys and sports goods, rubber products, and several textile-related categories repeatedly appear in the lower-left quadrant across multiple destination markets, reflecting narrow export structures and weak demand compatibility.
16. The United States market exhibits comparatively stronger sectoral positioning than most other destinations. Sectors such as cereals, cereal preparations, pharmaceuticals, clocks and watches, coated and technical textiles, cosmetics, miscellaneous edible preparations, and miscellaneous manufactured goods fall in the upper-right quadrant, indicating stronger alignment with U.S. demand alongside relatively broader product structures.
17. Pakistan's exports to China remain narrowly concentrated and weakly aligned with Chinese demand patterns. Major sectors including cotton, ores and slag, copper, aluminium products, plastics, carpets, leather goods, machinery, and knitted fabrics fall in the lower-left quadrant. Only a limited number of sectors—such as mineral fuels, cereals, seafood, prepared fish, cosmetics, miscellaneous chemical products, and printed matter—show stronger performance across both diversification dimensions.
18. Pakistan's exports to the European Union remain weakly diversified despite the EU's importance as a major export destination. Most sectors—including cotton, wool, cereals, fish products, dairy, meat products, tobacco, organic chemicals, and miscellaneous base metals—remain concentrated in the lower-left quadrant, while only a few sectors, such as fertilizers, perfumery, technical textiles, and basketware-related products, demonstrate stronger product-market alignment.
19. Exports to the United Kingdom show limited structural alignment despite relatively broader market access. Most sectors remain concentrated in low-diversification and weakly aligned categories, whereas only headgear, cereal preparations, printed matter, fur-related products, and miscellaneous edible preparations appear strongly positioned in both dimensions.

20. Gulf markets demonstrate mixed but generally vulnerable export structures. In the United Arab Emirates and Saudi Arabia, sectors such as apparel, machinery, electrical equipment, furniture, carpets, plastics, and leather products remain concentrated in the high-vulnerability quadrant. In contrast, sectors including mineral fuels, fish products, cosmetics, pharmaceuticals, sugar preparations, cereal products, and miscellaneous edible products perform relatively better.
21. Bangladesh represents a highly concentrated and weakly aligned export market for Pakistan. Most sectors—including cotton textiles, furniture, oils and fats, aluminium products, and sugar products—are concentrated in the lower-left quadrant, while only a few sectors such as cereal preparations, edible preparations, technical textiles, and plaiting materials show stronger diversification performance.
22. Exports to Indonesia, and Malaysia are largely concentrated in structurally vulnerable sectors. Across these markets, sectors such as electrical machinery, leather products, machinery, furniture, carpets, plastics, footwear, apparel, and rubber products repeatedly exhibit weak diversification and poor demand alignment.
23. Only a limited number of sectors consistently demonstrate strong performance across markets. Sectors such as pharmaceutical products, cereal and flour preparations, fish and seafood, coated or technical textiles, cosmetics and perfumery, printed matter, headgear, and miscellaneous edible preparations frequently appear in the upper-right quadrant, indicating stronger resilience and demand compatibility across multiple export destinations.
24. Many sectors demonstrate market relevance but weak product diversification. Sectors including cotton, edible fruits and nuts, iron and steel, paper products, oil seeds, and chemicals frequently appear in the upper-left quadrant, suggesting reasonable alignment with market demand but vulnerability due to a narrow export product base.
25. Pakistan's export vulnerability appears primarily structural rather than market-access related. The persistence of low-diversification and weakly aligned sectors across both developed and regional markets suggests that the main constraint lies in export composition and product competitiveness rather than limited market availability.
26. The vulnerability matrix highlights clear policy priorities across sectors. High-vulnerability sectors require product upgrading, diversification, and market repositioning, while stronger-performing sectors—such as pharmaceuticals, processed foods, technical textiles, and fisheries—present opportunities for scaling exports and increasing value addition.
27. Pakistan's export basket exhibits limited geographical reach despite a relatively broad product range. Out of 3,178 HS-6 digit exported products, nearly 1,511 products (around 48%) are exported to only 2–4 destination markets, indicating that a substantial portion of exports has a very narrow international footprint.
28. Only a small share of Pakistani products achieves broad market penetration. While 530 products reach 5–7 markets and 278 products reach 8–10 markets, only 126 products are exported to more than 50 countries, highlighting weak geographical diversification across most of the export basket.
29. Pakistan's export diversification challenge is driven more by limited market reach of existing products than by lack of product variety. The evidence suggests that many products already exist in the export basket but remain confined to a small number of destinations, implying substantial unrealized potential for market expansion.
30. Export product penetration is concentrated in a few major destinations. The United Arab Emirates (1,677 products) imports the widest range of Pakistani products, followed by the United States (1,293 products), the United Kingdom (1,227 products), Germany (983 products), and Saudi Arabia (913 products), reflecting relatively deeper trade integration in these markets.

31. Advanced Western and Gulf markets account for the broadest product coverage of Pakistan's exports. Countries such as Italy, Canada, Australia, the Netherlands, Afghanistan, and China also import between 600–750 products, suggesting moderate export diversification in these markets.
32. Many export destinations exhibit shallow product penetration. A large number of countries import fewer than 50 Pakistani products, while several destinations receive only one or two products, reflecting weak market integration and highly concentrated bilateral trade relationships.
33. The findings indicate significant scope for extensive-margin export growth. Expanding the number of destination markets for already-exported products presents an opportunity to strengthen export resilience and reduce vulnerability to demand shocks in individual markets.

Key Findings – Chapter 3: Assessment of Pakistan's Export Potential

in Selected Markets

1. Pakistan possesses substantial unrealized export potential across major international markets despite maintaining an existing export presence, indicating scope for expansion in products already exported.
2. The United States, China, the European Union, the United Kingdom, and the United Arab Emirates emerge as the most important markets for export growth, with opportunities spanning both traditional and value-added sectors.
3. Textiles and apparel dominate Pakistan's unrealized export potential across nearly all markets. Products such as bedlinen, towels, cotton garments, hosiery, knitted apparel, gloves, and made-up textile articles consistently remain below estimated export capacity.
4. Agricultural and food commodities represent another major source of unrealized export potential. Rice, maize, sesame seeds, citrus fruits, mangoes, potatoes, onions, seafood, and processed food products repeatedly show export gaps across multiple markets.
5. Industrial and higher value-added products, including medical instruments, medicaments, PET, refined copper, chemicals, aluminium products, leather goods, and footwear, demonstrate selective but meaningful export opportunities beyond traditional textile exports.
6. Export opportunities differ across destination markets, reflecting market-specific demand patterns. Developed markets show stronger opportunities in value-added textiles and manufactured products, whereas regional markets display greater demand for food commodities, textile intermediates, and basic consumer goods.
7. China, Indonesia, and Malaysia present relatively diversified export opportunities across industrial raw materials, agriculture, textiles, and selected manufactured goods, while Afghanistan and Bangladesh exhibit comparatively concentrated opportunity structures.
8. The European Union, United Kingdom, and Gulf markets remain particularly important for textiles, home furnishings, and agro-based exports, reflecting Pakistan's established comparative advantage in these sectors.
9. Most unrealized export opportunities are concentrated in products Pakistan already exports, suggesting that deeper market penetration, quality upgrading, compliance, and value addition are more important for export growth than entirely new product discovery.

Key Findings – Chapter 4: Market Competitiveness Analysis of

Pakistan's Export Products with Untapped Export Potential

1. Pakistan's competitiveness in products with unrealized export potential is largely concentrated in price-sensitive and lower-to-mid unit value segments rather than premium, differentiated markets.
2. Textiles and apparel remain Pakistan's strongest competitive sectors across major markets, particularly in bedlinen, towels, garments, hosiery, and made-up textile products, though higher-value positioning is dominated by exporters such as Türkiye, China, and European economies.
3. Agro-based and commodity exports, including rice, sesame seeds, maize, citrus fruits, and chromium ores, demonstrate relatively stronger price competitiveness, reflecting Pakistan's cost advantage in commodity-driven markets.
4. Competitive positioning varies across destinations. Developed markets such as the United States, United Kingdom, Germany, Netherlands, and China are more quality-sensitive and value-driven, while regional markets such as Afghanistan, UAE, and Bangladesh remain more price and supply-chain oriented.
5. Afghanistan represents Pakistan's strongest competitive market, where geographical proximity and established trade linkages support dominant market shares across food, agricultural, pharmaceutical, and basic manufactured products.
6. In the UAE and Bangladesh, Pakistan maintains strong participation in agro-based goods, textiles, and intermediates but remains concentrated in lower-value segments amid regional competition.
7. Unit value comparisons indicate that unrealized export potential is constrained more by limited value addition, branding, and product differentiation than by market access barriers, as Pakistan already maintains export presence in most identified markets.
8. Industrial and intermediate products such as refined copper, PET, chemicals, and cement-related goods show selective competitiveness, indicating opportunities beyond traditional textile exports.
9. Overall, Pakistan's competitiveness challenge appears structural, highlighting the need for quality upgrading, compliance, branding, and movement toward higher-value market segments to better realize untapped export potential.

Key Findings – Chapter 5: Assessment of Export Diversification

Opportunities in Selected International Markets

1. Pakistan's export diversification opportunities are concentrated in agro-food products, industrial materials, light manufacturing, and selected consumer goods, indicating scope to broaden exports beyond the traditional textile base.
2. The Product Diversification Indicator (PDI) suggests that Pakistan possesses feasible entry potential in products closely linked to its existing productive capabilities, reflecting a path-dependent diversification pattern rather than abrupt structural transformation.
3. Developed markets such as the USA, UK, and the European Union present broad but highly competitive diversification opportunities, particularly in processed foods, household goods, construction materials, electronics-related components, and niche consumer products.

4. The European Union and USA markets exhibit the widest range of diversification opportunities, reflecting their large import demand across industrial products, processed food, fisheries, consumer goods, and medium-value manufactures.
5. China offers strong diversification potential in industrial raw materials and intermediate products, including ferro-alloys, chemical inputs, textile materials, and selected agro-based commodities, reflecting complementarities with China's manufacturing-intensive economy.
6. Gulf markets, particularly the UAE and Saudi Arabia, display diversified opportunities linked to food security, household consumption, and infrastructure development, creating demand for processed foods, construction materials, sanitary products, and consumer goods.
7. Afghanistan represents a relatively concentrated but practical diversification market, with opportunities centered on staple foods, construction materials, essential household items, and low-cost manufactured goods driven by domestic consumption and reconstruction needs.
8. Bangladesh and Indonesia offer strong opportunities in industrial and textile-related intermediate products, reflecting integration potential within regional manufacturing and garment value chains.
9. Malaysia presents balanced diversification opportunities across industrial inputs, seafood, agro-based products, and consumer goods, indicating potential for both industrial and consumption-oriented exports.
10. Food and agro-based commodities emerge consistently across nearly all markets, including sugar, legumes, lentils, seafood, cardamoms, fruits, edible oils, and processed food products, highlighting diversification opportunities beyond Pakistan's traditional agricultural exports.
11. Industrial and construction-related materials represent a major cross-market opportunity, with recurring demand for steel products, ceramic tiles, sanitary fixtures, fertilizers, vehicle wiring, cables, and chemical intermediates.
12. Consumer and household products show meaningful diversification potential, including footwear, notebooks, household iron articles, floor coverings, washing machines, wigs, and selected apparel products, particularly in developed and Gulf markets.
13. Textile-related diversification opportunities increasingly lie in non-traditional and specialized segments, including floor coverings, fibre yarns, knitted fabrics, and niche apparel rather than Pakistan's conventional cotton textile exports.

Key Findings – Chapter 6: Competitiveness Analysis of Pakistan's

Export Diversification Products in International Markets

1. International markets for Pakistan's potential diversification products are generally characterized by high supplier concentration, with a limited number of countries dominating imports across most product categories.
2. Asian economies—particularly China, India, Indonesia, Türkiye, Viet Nam, Bangladesh, and Thailand—dominate supply structures across multiple markets, indicating strong regional production networks and established competitive advantages.
3. Manufactured and standardized products generally exhibit high market concentration and stronger entry barriers, particularly in categories such as footwear, notebooks, electronics-related products, wigs, and textile manufactures, where dominant suppliers maintain scale and cost advantages.

4. Agro-based and intermediate products tend to display relatively more diversified sourcing structures, particularly in products such as lentils, cinnamon, castor oil, seafood, and agricultural commodities, indicating comparatively more flexible competitive environments.
5. China remains the dominant supplier in many labor-intensive and manufactured product categories, particularly in developed markets such as the USA, UK, Germany, and the Netherlands, reflecting strong global competitiveness in large-scale manufacturing.
6. Regional trade integration strongly shapes supplier structures in Asian markets, particularly in China, Bangladesh, and Afghanistan, where sourcing patterns remain concentrated among neighboring or regionally linked economies.
7. Afghanistan represents the most concentrated and regionally dependent market, with imports largely controlled by neighboring economies, indicating competition shaped more by geographic proximity and logistics than broad global market forces.
8. Developed markets such as the USA, UK, Germany, and the Netherlands exhibit highly segmented import structures, combining strong competition in low-cost mass-market segments with smaller premium niches characterized by higher unit values.
9. Unit value dispersion across suppliers confirms a dual-tier market structure in most destination markets, where low-cost bulk exporters coexist alongside higher-value niche suppliers differentiated by quality, branding, specialization, or product sophistication.
10. Pakistan's potential diversification products are likely to face stronger competition in price-sensitive segments, particularly where Asian exporters dominate through economies of scale and established supply chains.
11. Higher-value market segments remain comparatively less concentrated, particularly in developed markets, suggesting differentiated opportunities in specialized or premium product categories.
12. Market entry conditions vary considerably across products and destinations, with greater flexibility observed in diversified agro-based categories and relatively stronger competitive pressure in manufactured and industrial goods.
13. Regional and emerging markets such as the UAE and Bangladesh exhibit oligopolistic supplier structures, where imports are shared among a limited number of competitive exporters rather than a single dominant supplier.
14. Import markets across most countries reflect segmentation by both price and quality, indicating that competitiveness depends not only on cost advantages but also on positioning within existing price-quality hierarchies.
15. Supplier dominance in many product categories reflects strong incumbency advantages, suggesting that existing trade linkages, supply-chain integration, and established market presence significantly shape competitive outcomes.
16. Overall, the findings indicate that export diversification opportunities exist within highly competitive and segmented international markets, where competitive positioning varies across products depending on supplier concentration, price competitiveness, and product differentiation.

**POLICY
RECOMMENDATIONS**



Chapter 10

POLICY RECOMMENDATIONS

1. Reduce export concentration through targeted product diversification

Findings show that Pakistan's exports are highly concentrated in a few textile and agro-based products. Policy should directly target HS-6 level products identified in this study with unrealized export potential, particularly in processed foods, fisheries, light manufacturing, chemicals, pharmaceuticals, and selected industrial goods. Export promotion should move from broad sector support to product-specific expansion strategies.

2. Upgrade competitiveness within existing export products

The analysis shows that Pakistan is largely positioned in low-to-mid unit value segments across major markets. A key policy priority is upgrading within existing export lines—especially textiles, apparel, rice, and agro-based goods—through quality improvement, product differentiation, design innovation, and stronger branding to access higher-value market segments.

3. Strengthen market-specific export strategies

Findings indicate strong variation in competitiveness across destinations. Developed markets (USA, EU, UK) require compliance, certification, and value-added upgrading, while Gulf markets offer opportunities in agro-food and construction-related goods. China and Southeast Asia provide scope for industrial inputs and intermediates, whereas Afghanistan and Bangladesh remain largely price-sensitive markets. Export strategy should be tailored accordingly.

4. Focus on sectors with consistent competitiveness across markets

The study identifies pharmaceuticals, processed foods, fisheries, technical textiles, and selected manufactured goods as consistently competitive across multiple destinations. These sectors should be prioritized for scaling up exports, investment support, and global market penetration.

5. Exploit agro-food export potential across markets

A key finding is the consistent unrealized potential in agro-based exports such as rice varieties, fruits, vegetables, seafood, spices, and edible preparations across nearly all destination markets. Policy should support upgrading in grading, packaging, processing, and export logistics to move toward higher-value agro exports.

6. Develop export clusters in high-potential sectors

Sectoral clustering should be promoted in textiles (technical and specialized segments), agro-processing, fisheries, and light engineering. This will improve scale efficiency, quality control, and export readiness in sectors identified as having both current strength and future potential.

7. Improve trade intelligence and product-market matching

Given the strong market-specific variation in competitiveness, there is a need for better trade intelligence systems to align products with demand structures in different countries. Enhanced use of HS-6 level analysis, buyer mapping, and targeted export promotion can improve market penetration.

■ 8. Strengthen logistics and trade facilitation

Infrastructure bottlenecks such as high logistics costs, port inefficiencies, and weak cold-chain systems continue to constrain export realization. Modernization of ports, improvement in freight systems, and digitalization of customs procedures are necessary to reduce transaction costs and improve reliability.

■ 9. Address productivity and institutional constraints

Low productivity, weak firm capabilities, and regulatory inefficiencies further limit export diversification. Policies should support technology upgrading, ease of doing business reforms, improved access to finance for exporters, and institutional coordination to strengthen long-term export competitiveness.

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