

# High value addition is the only way forward for the weaving sector

Our present issue as per our past traditions is devoted to the vibrant weaving industry of Pakistan. Inside you will find in depth analysis of Pakistan's weaving sector as well as the reports on the leading weaving technology for our valued readers. Pakistan is the world's fourth largest producer of cotton and third largest producer of yarn in the world providing abundant raw material for the weaving industry of Pakistan. The total exports of the conventional weaving sector amounted to USD 2.2 billion in 2015-16 which is a decline of 10% in the fabric exports from USD 2.42 billion in 2014-15.

The single largest importing country of Pakistan's cotton fabrics is Bangladesh accounting for 22% of the total fabric exports. Bangladesh is converting Pakistani cotton fabrics into quality garments retaining the first position in the global garment exports segment. While total fabric exports from Pakistan declined by 10% in the said period, Bangladesh made a robust increase of 10% in its imports of Pakistani fabrics. However, it can be said that Bangladesh is not the biggest market for fabrics from Pakistan.

The biggest importer of cotton fabrics from Pakistan collectively remains the European Union that accounts for 25% of total cotton fabric exports with USD 566 million. Within the EU, Italy is the biggest market for Pakistani fabrics followed by Germany Spain, The Netherlands, United Kingdom, Belgium, Poland, Greece and Slovenia. Outside the European Union, China, Turkey and USA, Sri Lanka, Egypt, and Vietnam remain principal buyers of Pakistani cotton fabrics.

The trends show that other than Bangladesh, fabric exports have been gradually declining during the last few years. This decline indicates the difficulty to exporting basic cotton fabrics in the highly competitive global textile market.

On the other hand, Pakistan is doing extremely well in the weaving sub-sector of denim fabrics. With a huge investment in the denim manufacturing in the last ten years, Pakistan has become the second largest manufacturer of denim in the world after China. At present, there is 40 state of the art denim manufacturing and processing mills dedicated to the production of the highest quality fashion denim fabrics and garments. From 84 million square meters in 2008, exports of denim fabrics reached an all-time high of 425 million meters in 2016. The natural advantage that the denim sector enjoys the availability of raw material i.e. high quality low to medium count cotton yarn that is most suitable for this purpose. Bangladesh is the biggest buyer of Pakistani denim fabrics accounting for 52% of the total exports of denim fabrics followed by Turkey with 25% of denim fabric exports from Pakistan.

The other performing sector of high value added fabrics is of the locally consumed fabric Lawn (voile). The Lawn is designed using fine, high count yarns, which results in a silky, untextured feel. The market of this remarkable product has transformed the consumer market for women's wear over the last few decades. The domestic market has become an enticing business in Pakistan, where the summer is long lasting for almost nine months. The large composite manufacturers have developed the retail market of this comfortable and suitable fabric for the hot climate.

Over the last decade, the 'designer lawn' has entered the retail landscape of Pakistan. With a population of more than 200 million, and an 80 million strong middle class, the demand for exclusive designer fabrics has seen a most remarkable growth spurring the new retail outlets in shining brand new shopping malls. The increasing domestic market of high-quality fabrics allowed significant investments to take place in the weaving sector. While the leading manufacturers continue to bring unique and new designs for their discerning customers, the copies of these designs reach the masses through cheap imitations. According to unofficial estimates, the size of the Lawn fabric market has reached a staggering PKR 50 billion. The technology to add value and exclusivity to this fine fabric is digital printing which is providing the designers with the right tools to bring their creations to life.

It is evident that the weaving sector of Pakistan remains a vibrant sector, but with the right approach and the direction towards niche products and high-value addition it will not only survive and thrive in the future. ♦

