

Beyond the Stitch: Repositioning Pakistan's Textile Industry through Design Authorship
A Practice-Informed Industry Analysis

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ABSTRACT

Pakistan's textile industry is internationally perceived primarily as a low-cost manufacturing and labour-sourcing base for global apparel supply chains, even though the country possesses one of the world's deepest and most historically continuous textile design traditions. This paper examines how a single textile designer, and the practice model that designer represents, can act as the pivot point that shifts the industry's image from "labour" to "brand." Rather than treating image change as something only trade policy or large corporations can deliver, the paper argues that the designer is the specific agent capable of converting anonymous production capacity into named, storied, value-attributed creative work, and that this conversion is replicable at the level of an individual studio or brand before it is replicable at the level of national policy. Drawing on nation-branding theory, country-of-origin literature, and the creative-economy and craft-revival scholarship, the paper analyses Pakistan's current textile export profile, in which textiles account for roughly 60 percent of national exports yet remain concentrated in low-value-added categories, alongside a growing but fragmented design sector. Using illustrative cases drawn from established fashion houses, craft-based social enterprises, natural-dye and heritage-led studio practices, and design education institutions, the paper identifies five mechanisms available to an individual designer, heritage-to-contemporary design translation, provenance and storytelling, craft-cluster dignification, design-led education and capacity building, and digitally enabled global market access, and sets these out as a practical roadmap that one designer or studio can follow. It concludes with policy and institutional recommendations for scaling that individual roadmap into an industry-wide shift in image.

Keywords: *nation branding, textile design, Pakistan, craft revival, country-of-origin effect, creative economy, value addition, design entrepreneurship*

INTRODUCTION

When international buyers, media, and policymakers think of the Pakistani textile industry, the dominant frame is one of volume and cost rather than authorship and value. Pakistan is consistently described in trade literature as a "sourcing destination": a country that spins yarn, weaves cloth, and stitches garments for brands headquartered elsewhere. This is not an unfounded characterisation. Textiles and apparel constitute the backbone of Pakistan's export economy, and the sector's growth has been driven overwhelmingly by intermediate and semi-finished categories such as yarn, grey cloth, bedwear, and basic knitwear rather than by designed, branded, or premium-positioned products.

This paper starts from a simple but consequential distinction: the scale of an industry and the image of that industry are not the same thing, and they do not necessarily move together. Bangladesh and Pakistan both export enormous volumes of low-cost garments, yet neither has achieved a strong positive brand association in international markets in the way that Italy, Japan, or increasingly India have around textile craftsmanship. India offers the more instructive comparison: despite comparable labour-cost structures and a similarly large workforce, India has cultivated an international image around handloom, block printing, and designer ateliers that coexists with, and partially offsets, its mass-manufacturing reality. The difference is not primarily industrial; it is a difference in who is telling the story of the cloth, and how.

This paper asks a narrower and more actionable question than "how does a country change its image": how can a single textile designer, whether a fashion designer, a textile print and surface designer, a craft-revivalist entrepreneur, or a design educator turned founder, change how the Pakistani textile industry itself is perceived? The premise is that industry image is not repositioned by policy documents or advertising campaigns first; it is repositioned by individual designers who prove, one collection or one studio at a time, that Pakistani textile production can carry authorship, provenance, and craftsmanship rather than only cost. This paper sets out that individual designer's pathway, and then asks what has to be true at the industry and policy level for that pathway to be repeatable at scale. It draws on the landscape of Pakistani design-led textile brands, craft enterprises, and educational institutions, and on the author's own vantage point as a textile design academic and studio practitioner, to interpret the mechanisms at work.

LITERATURE REVIEW

Nation Branding and the Country-of-Origin Effect

Nation-branding scholarship, most notably Simon Anholt's concept of "competitive identity," treats a country's international reputation as an asset that is built cumulatively through the visible behaviour of its products, culture, governance, and people, rather than through slogans or campaigns alone. Anholt's framework is useful here because it explicitly separates the substance of what a country does (its industry, exports, policy) from the story that substance tells, and argues that the two must be aligned for a national image to shift credibly. A parallel body of marketing literature on the country-of-origin effect shows that consumers use a product's national origin as a quality and value cue, particularly in categories such as fashion and design where craftsmanship and heritage carry premium associations. "Made in Italy," "Japanese denim," and increasingly "Indian handloom" function as origin-labels that add rather than subtract value; "Made in Pakistan" and "Made in Bangladesh," by contrast, are still read primarily as cost signals within global apparel sourcing decisions.

Creative Economy and Craft Revival

A second strand of literature, associated with the creative-economy and craft-revival scholarship, examines how design intervention can convert traditional artisanal skill into contemporary, market-facing product without severing it from cultural provenance. This work generally identifies three requirements for successful craft-to-brand transitions: design translation (adapting traditional motifs, techniques, and materials for contemporary use-cases and aesthetics), narrative capital (attaching a verifiable, communicable story of origin, maker, and process to the product), and market infrastructure (retail, digital, and export channels capable of carrying that story to the end consumer). Practice-based research frameworks in design, including Schön's reflective-practitioner model and Haseman's performative paradigm, are relevant here because much of this translation work happens through iterative studio practice rather than through top-down policy design; the designer functions as the primary agent of cultural interpretation.

Pakistan's Textile Economy: Scale Without Story

Pakistan's textile and apparel sector accounts for roughly 60 percent of national merchandise exports and around 8.5 percent of GDP, employing an estimated 40 percent of the industrial labour force. Textile exports reached approximately \$17.85 billion over the first eleven months of 2025, and roughly \$10.9 billion in the first seven months of fiscal year 2025–26, with growth concentrated in value-added

categories such as knitwear, bedwear, and ready-made garments rather than in raw or semi-processed textiles. The European Union, which absorbs around a quarter of Pakistan's exports under the GSP+ preferential-tariff scheme, remains overwhelmingly a market for bulk product categories such as bed linen and basic garments rather than for designer or premium-positioned goods; industry bodies have specifically called for product diversification beyond bed linen toward higher-value, design-differentiated categories. This is the structural backdrop against which any designer-led image transformation must operate: a sector that is large, resilient, and globally integrated, but whose growth strategy has historically been volume- and tariff-driven rather than brand-driven.

PAKISTAN'S CURRENT IMAGE: THE LABOUR-AND-COST FRAME

Three reinforcing factors sustain the "labour" frame in international perception. First, the product mix: even as value-added categories have grown, Pakistan's EU-bound exports remain concentrated in commodity lines like bed linen and basic trousers, and national trade analysis has repeatedly flagged that a large share of Pakistan's export basket sits in "retreat" categories characterised by low global demand growth and limited differentiation. Second, the compliance and labour-conditions narrative: Pakistan's continued access to preferential EU tariffs under GSP+ is explicitly conditioned on, and publicly discussed in terms of, labour rights, factory safety, and human-rights performance, which keeps international media coverage anchored to workplace conditions rather than to design or craftsmanship. Third, anonymity of production: because the overwhelming majority of Pakistani textile output enters global markets through private-label and contract-manufacturing arrangements, the designer, the maker, and the workshop are structurally invisible to the end consumer; the garment carries a Western retailer's brand, not a Pakistani design signature.

None of this is unique to Pakistan among large apparel-exporting countries, but the absence of a strong, competing design-brand narrative means the labour frame goes largely unchallenged. Where Indian handloom, Japanese selvedge denim, or Peruvian alpaca knitwear each have a recognisable design-led counter-narrative running alongside their mass-manufacturing sectors, Pakistan's design-led textile sector remains comparatively small, domestically focused, and under-exported as a story in its own right.

THE DESIGNER AS THE INDUSTRY'S IMAGE-BEARER

The textile designer occupies a structurally distinct position from the manufacturer, the exporter, and the trade official. Manufacturers compete on cost, capacity, and compliance; exporters compete on price and delivery reliability; trade bodies negotiate market access. The designer is the only actor in this chain

whose core output is authorship: a recognisable point of view about what a fabric, garment, or print means, who made it, and why it looks the way it does. It is this authorship that nation-branding theory identifies as the missing ingredient in Pakistan's current export narrative.

Pakistan already has a visible, if under-scaled, layer of design-led fashion houses that demonstrate the mechanism in miniature. Established prêt-à-porter and couture houses such as Sana Safinaz, Élan, Khaadi, Gul Ahmed, and Generation, along with designers like HSY and Bunto Kazmi, have built recognisable brand identities around Pakistani textile heritage, including block printing, embroidery, and regional textile crafts, and have achieved growing recognition in South Asian and diaspora markets and, increasingly, in international retail and digital commerce. Parallel to the couture and prêt sector, a smaller layer of craft-based social enterprises and heritage-led studios works directly with artisan clusters producing ajrak, phulkari, sindhi embroidery, block-printed cloth, and natural-dye textiles, translating regional craft vocabularies into contemporary product lines aimed at conscious-consumer and slow-fashion markets. Both layers matter to this argument, not as isolated success stories but as evidence that Pakistan possesses the design capability required for image transformation; what is missing is scale, coordination, and export orientation.

Design education is the institutional infrastructure underneath this layer. Institutions such as the National College of Arts (Lahore), the Pakistan Institute of Fashion and Design, the Indus Valley School of Art and Architecture, and university-based textile design departments across the country, including programmes built from the ground up over the past two decades, train the designers who staff both the couture houses and the craft-revival studios, and who increasingly move into entrepreneurship themselves. The strength of this education layer, and its historical continuity with regional craft knowledge, is one of Pakistan's underleveraged assets relative to competitor countries.

MECHANISMS OF TRANSFORMATION

Five interlocking mechanisms, drawn from the cases and literature above, describe how designer-led activity can shift the image from labour to brand.

Heritage-to-Contemporary Design Translation

The first mechanism is the deliberate translation of historical and regional design vocabularies, such as Indus Valley and Harappan motifs, Mughal-era architectural ornamentation, and regional textile crafts including ajrak, phulkari, and block printing, into contemporary silhouettes, palettes, and product categories that read as current rather than merely archival. This translation work is precisely the studio-

based, practice-led activity that positions the designer as interpreter rather than producer: the same technical skill (hand block printing, resist dyeing, embroidery) can either be commissioned anonymously for a foreign private-label order, or authored and attributed as a named design collection with a communicated cultural narrative. The value differential between these two outcomes is almost entirely a function of design authorship, not production cost.

Provenance and Storytelling

The second mechanism is the attachment of a verifiable, communicable story of origin, material, and process to the finished product, which is what nation-branding and country-of-origin literature identify as the primary driver of positive image transfer. This includes disclosure of natural dye sources, mordant and process choices, the specific artisan cluster or region involved, and the designer's own practice narrative. Sustainability-oriented storytelling, including natural dyeing, low-impact processing, and traceable supply chains, is particularly well positioned to resonate with EU markets, where upcoming regulatory requirements such as the Digital Product Passport under the EU's Ecodesign for Sustainable Products Regulation will formally require exporters to disclose production history, material composition, and environmental performance from 2027 onward. Designers who have already built provenance-based storytelling into their practice are, in effect, ahead of a regulatory shift that will otherwise be experienced by anonymous contract manufacturers as a compliance burden rather than a brand opportunity.

Craft-Cluster Dignification

The third mechanism reframes the labour narrative from within, rather than avoiding it. Roughly 15 million people are employed in Pakistan's textile sector, the great majority in production roles rather than design roles, and the sector's international image problem is partly a genuine labour-conditions problem rather than only a perception problem. Designer-led craft enterprises that name individual artisans, workshops, or clusters, that pay above-commodity rates for skilled hand-processes, and that visibly channel value back to the maker convert the same labour-intensive production base into a "maker economy" narrative rather than a low-cost labour narrative. This does not resolve the underlying labour-rights concerns that shape Pakistan's GSP+ compliance record, but it demonstrates, at the level of individual enterprises, an alternative production ethic that trade negotiators and industry bodies can point to as a credible direction of travel.

Design-Led Education and Capacity Building

The fourth mechanism is the continued strengthening of design education infrastructure, which determines the future supply of designers capable of doing the translation and storytelling work described above. Textile design departments that build screen-printing studios, natural-dye and CAD labs, and digital fabric-printing facilities from the ground up are simultaneously training designers and generating a pipeline of graduate-founded studios and brands. Curriculum that pairs technical craft training with practice-based research methods, including the kind of reflective, iterative studio inquiry associated with Schön and Haseman, produces designers equipped to research and articulate cultural provenance rather than only execute technique, which is a prerequisite for credible international storytelling.

Digitally Enabled Global Market Access

The fifth mechanism is the use of digital tools, including AI-assisted visual content production, e-commerce, and direct-to-diaspora marketing, to bypass the traditional dependency on foreign private-label buyers for market access. Where a manufacturer needs a buyer's order to reach an international market, a designer-led brand can reach conscious-consumer, slow-fashion, and diaspora audiences directly, at a fraction of the cost of a traditional trade-fair or wholesale strategy. This channel is particularly significant for small and mid-sized design studios that cannot compete on volume but can compete on distinctiveness, and it is the mechanism through which a Pakistan-based designer's individual practice can accumulate an international audience without first passing through a foreign brand's supply chain.

FROM ONE DESIGNER TO AN INDUSTRY IMAGE: A PRACTICAL ROADMAP

The five mechanisms above are abstract until they are sequenced into something an individual designer or small studio can actually follow. What distinguishes a designer whose work quietly changes how buyers, press, and peers perceive Pakistani textiles from one whose work does not is rarely raw talent; it is usually the deliberateness with which these steps are taken and documented.

- Anchor the work in a specific, researchable heritage source, whether a regional craft technique, a historical motif system, or a material tradition, rather than a generic "ethnic" or "ethnic-fusion" label, so the design has a defensible story rather than a decorative one.

- Name the process and the people: disclose dye sources, mordants, weave or print structures, and the workshop or artisan cluster involved, in the same way a wine label names a vineyard, so the product carries provenance rather than anonymity.
- Build one signature technical or material differentiator, such as a natural-dye palette, a revived print method, or a distinctive hand-finishing process, and repeat it consistently across collections until it becomes recognisable as that designer's, and by extension Pakistan's, contribution rather than a one-off.
- Price and position the work as authored design rather than as competitively priced production, even at small scale, since underpricing signals "labour" regardless of the story attached to the product.
- Document and publish the practice, through exhibitions, academic or trade-press writing, and digital channels, so the designer's interpretive work is visible and citable rather than only embedded in the finished garment.
- Train at least one successor or apprentice in the same practice model, so the shift in image outlives a single designer's career and compounds across a studio, a department, or a craft cluster.

None of these steps requires external funding or policy change; they are available to an individual designer working today. What they produce, cumulatively and across enough individual practitioners, is the industry-level pattern change described in the sections that follow: a critical mass of designers whose combined visibility gives trade bodies, journalists, and buyers an alternative, evidence-based story to tell about Pakistani textiles.

CHALLENGES AND STRUCTURAL BARRIERS

Several structural barriers constrain how far designer-led activity alone can shift the national image. Trade and diversification barriers are significant: national analysis shows a large share of Pakistan's EU-bound exports concentrated in low-growth, low-differentiation "retreat" product categories, and industry bodies have criticised the limited role of national trade-promotion institutions in developing new, higher-value markets. Compliance and governance conditions attached to GSP+ market access keep international attention anchored to labour and human-rights performance, and any deterioration or suspension risk in that status would fall hardest on precisely the value-added categories that designer-led brands are trying to build. Intellectual-property protection for textile design remains weak in practice, discouraging investment in original print and pattern development when designs can be copied with little legal consequence. Access to growth capital for design-led, brand-building enterprises, as opposed to

production-capacity financing for manufacturers, remains limited within Pakistan's financial sector, which is oriented toward asset-backed industrial lending rather than brand equity. Finally, political and security perception continues to shape how international buyers and media frame Pakistan independent of what its designers produce, meaning that image transformation is necessarily a slower, cumulative process rather than a campaign that can be won by the design sector alone.

DISCUSSION: REFRAMING LABOUR AS CRAFTSMANSHIP

The central conceptual move this paper proposes is a redefinition of what the existing textile workforce represents. The same 15 million-person workforce, and the same hand-process skills, currently read internationally as "cheap labour" can, without any change in headcount, read as "skilled craftsmanship" once designers attach authorship, provenance, and fair value distribution to the work. This is not a semantic exercise: it changes pricing power, changes which regulatory shifts (such as the EU's Digital Product Passport) become opportunities rather than burdens, and changes which media narratives get told about Pakistani textiles. The shift is achievable at the level of individual designers and studios today, and is already underway in fragments across the couture, craft-enterprise, and heritage-studio layers described above; the open question is whether trade policy, design education funding, and export-promotion infrastructure will be organised to scale that fragment into a national pattern, or whether it will remain a set of isolated practices operating alongside, rather than transforming, the dominant commodity-export narrative.

CONCLUSION AND RECOMMENDATIONS

Pakistan will not, and arguably should not, abandon its position as a major volume exporter of textiles and apparel; the sector is too large a share of GDP and employment for that to be a realistic or desirable goal. But volume and brand are not mutually exclusive, and the evidence surveyed here suggests that a designer-led layer, operating alongside the commodity-export base, is the most credible route to shifting international perception. Four recommendations follow directly from the mechanisms identified above:

- Trade promotion bodies should fund design-led export pavilions and buyer introductions specifically for craft-enterprise and heritage-studio brands, separate from bulk-manufacturing trade delegations, so that design narrative is not diluted by commodity pricing conversations.
- Design education institutions should be resourced to expand practice-based research capacity, particularly in natural dyeing, heritage motif research, and provenance documentation, so that

graduates enter the industry equipped to build storied, export-ready brands rather than only execution skills.

- Intellectual-property enforcement for textile print, pattern, and craft-derived design should be strengthened as a precondition for designers to invest in original development rather than default to replicable, easily copied work.
- Financial institutions and development-finance programmes should create brand-equity and working-capital instruments specifically for design-led textile enterprises, distinct from asset-backed industrial financing designed for large-scale manufacturers.

None of these steps requires abandoning Pakistan's manufacturing scale; each is aimed at building a parallel, design-authored export identity that can carry a different story into the same global markets. The designer's role in that story is not incidental. It is, on the evidence presented here, the single mechanism capable of converting anonymous production capacity into named, valued, and internationally legible Pakistani craftsmanship.

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