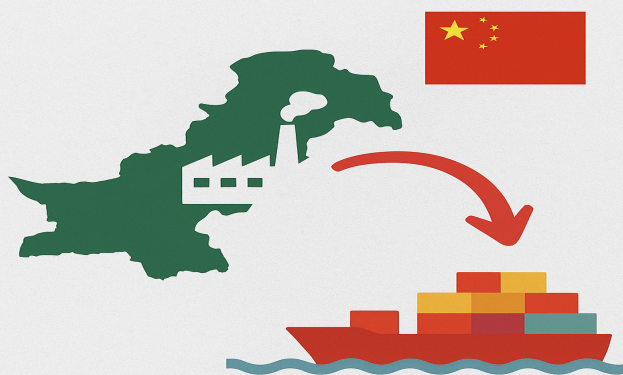


INDUSTRIALIZATION WITH CHINA



Pakistan's Synthetic Dyestuff Usage and Outlook

Pakistan's Colorant Landscape

ABSTRACT

This writeup provides an outlook on Pakistan's synthetic dyestuff usage, highlighting market size, key application areas, and China's strong contribution across various dye and pigment categories. It outlines the importance of trade facilitation between Pakistan and China, with a focus on reactive dyes, the largest dye segment in the textile industry. The study also reviews local production capacity, trade dynamics, and the potential impact of policy decisions on industry growth.

Author

Mr. Abdul Rahim Khatri holds a master's degree in Textiles from the University of Leeds with a core focus on Dyestuff Chemistry and Dyeing. With over two decades of experience in textile processing and the dyestuff industry, he possesses an in-depth understanding of dye selection, processes, and its applications. Mr. Khatri has also been actively involved in sustainability projects within the textile value chain, contributing to more environmentally responsible practices. Presently Leading the Sales and Technical Marketing Division with Chemi Colour Enterprises.

Pakistan’s synthetic dyestuff industry has grown into one of the most significant consumers in South Asia, driven by the textile sector but supported also by leather, paper, plastics, paints, and food-related industries. Synthetic dyes and pigments are classified under HS Code Chapter 3204, and their import and usage highlight the country’s reliance on foreign suppliers, particularly China.

Industry Segment Overview

Industry Segment	Market Share (%)	China’s Share (%)
Textile	70	65
Leather	10	55
Paper	7	50
Plastics & Paints	8	60
Food & Others	5	40

Pakistan’s reliance on imported synthetic dyes and pigments has been steadily increasing over the past decade, driven by the growing demands of multiple industries. While the textile sector remains the single largest consumer, accounting for nearly 70% of total dye consumption, other sectors such as leather, paper, plastics, paints, and food-grade colorants also represent significant demand centers. This widespread usage underlines the importance of ensuring consistent supply, competitive pricing, and favorable trade policies.

In recent years, China has emerged as Pakistan’s dominant supplier, with over 60% of the country’s total synthetic dye and pigment imports originating from there. This trend reflects both the competitive pricing offered by Chinese manufacturers and the preferential duty structures for Certain Class of Synthetic dyestuff, provided under the Free Trade Agreement (FTA). While Pakistan continues to import from countries such as, Korea, Taiwan and Europe. China’s share has steadily increased, reshaping the local market landscape.

In addition to the textile sector, other industries such as leather, paper, plastics, paints, and food-grade colorants rely heavily on imported dyes and pigments. These non-textile applications, while smaller in overall consumption, are critical for value-added industries that contribute significantly to Pakistan’s export base. This broad reliance underscores the need for a comprehensive policy approach, rather than focusing solely on the textile segment.

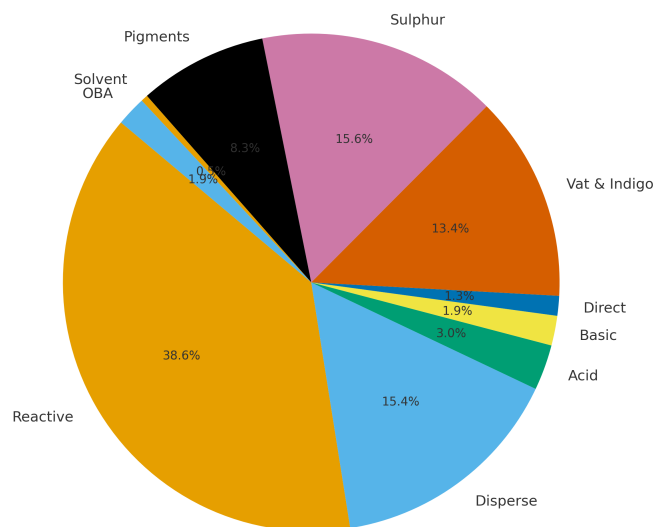
Another important aspect is the evolving global demand for eco-friendly and sustainable colorants. International buyers, particularly from the EU and North America, are increasingly demanding products that comply with stringent environmental regulations. For Pakistan to remain competitive, policymakers and industry leaders must encourage the adoption of dyes that not only meet cost and performance requirements but also align with global sustainability trends.

Segment-Wise Market Overview

Dye Class	Market Size (MT)	China's Share (%)	Key Applications
Reactive & Inks	30,000	44	Cotton, cellulose, printing inks
Disperse	12,000	94	Polyester dyeing & printing
Acid	2,300	52	Leather, wool
Basic	1,500	93	Acrylic fibers
Direct	1,000	70	Cotton, blended fabrics
Vat & Indigo	10,389	96	Denim, cotton with high fastness
Sulphur	12,153	92	Cotton, denim (esp. Sulphur Black)
Pigments	6,483	80	Paints, plastics, non-textiles
Solvent	35	71	Plastics, fuels, coatings, inks
OBA	1,500	67	Textile whitening (optical brightening)

Market Share Comparison by Dye Class

Pakistan Synthetic Dyestuff Market by Class (Approximate Share)



Local Manufacturing in Pakistan

Pakistan's domestic dye production is limited to 2500-3000 MT. Local manufacturers like Archroma, Sardar Chemical, and Chemi Dyestuff produce only basic reactive dyes, and even Archroma must import advanced grades. Other dyes, such as direct and solvent types, are made in small amounts by local Cottage Industry. For most other dye classes, the country depends almost entirely on imports. This lack of large-scale local production forces Pakistan to import the high-performance, export-quality dyes its critical textile sector requires.

Policy and Trade Outlook

Pakistan's textile industry, which accounts for the bulk of exports, depends heavily on imported dyes. Reactive dyes, the most widely used, are not currently covered under preferential duty treatment under the Pakistan-China FTA, unlike some other classes.

This heavy reliance on imports makes it essential for Pakistan to maintain smooth and cost-effective trade flows, particularly with China, which dominates the supply chain. Policy frameworks that encourage facilitation, rather than barriers, will be crucial for sustaining Pakistan's competitive edge in global markets. Even as FTA arrangements have improved access for some classes, Pakistan must remain mindful of the balance between protecting limited local production and supporting export-driven industries with affordable, quality dyestuffs.

Conclusion

Pakistan's synthetic dyestuff market is diverse, encompassing both textile and non-textile industries. The dominance of China as a supplier; across almost every class of dyes underscores the importance of stable trade ties. Reactive dyes, pigments, and sulphur dyes form the backbone of industrial demand, with textiles absorbing the majority share.

For Pakistan to strengthen its global export position, particularly in textiles, it must ensure the availability of high-quality dyes at competitive prices. While fostering limited local production is important, the broader national interest lies in facilitating trade, minimizing supply disruptions, and building strategic partnerships with key suppliers like China. Sustained cooperation will remain the cornerstone of growth in this vital sector.