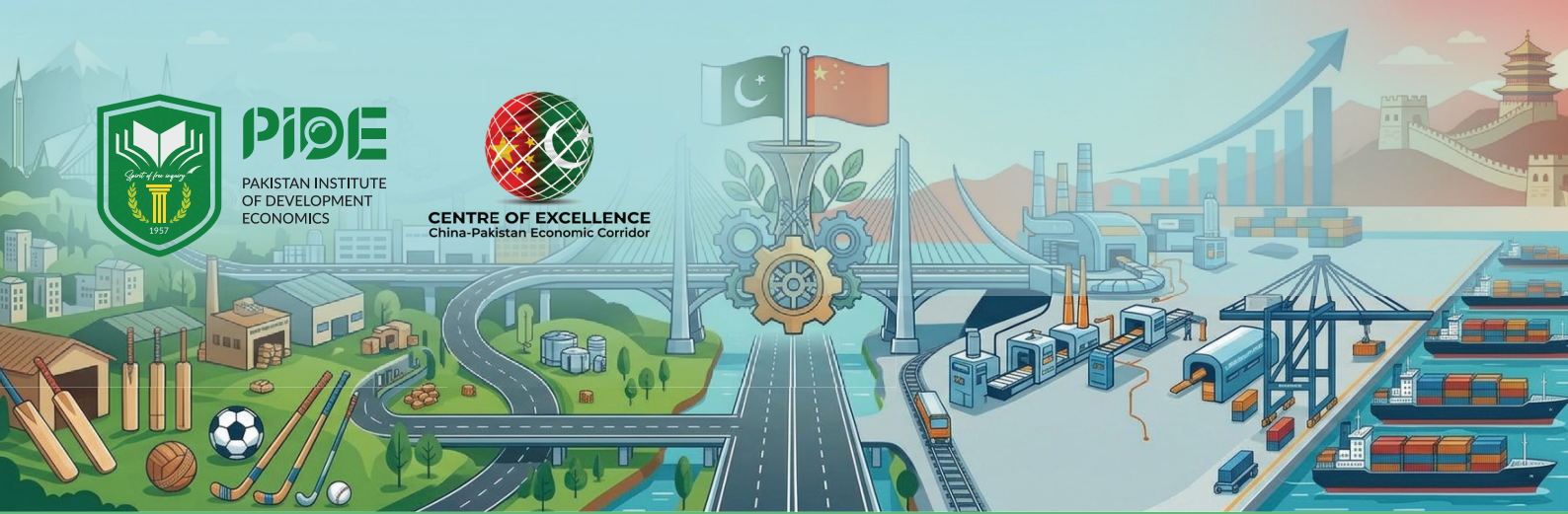




Policy View point: NO.82: 2026

Upgradation of Pakistan's Sports Industry and Export Maximization via China-Pakistan Partnership



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Pakistan's sports goods sector is losing ground. It holds under 1 percent of a fast-growing Chinese market next door. Most production is still manual, and most raw materials are imported. This brief recommends a Silk Road Sports Corridor with China to close that gap.

Executive Summary

Pakistan's sports goods industry is centred on Sialkot. It is one of the country's oldest and most recognized manufacturing sectors. The industry earned roughly \$385 million in export revenue in FY2024-25 (PBS, 2025). In the first ten months of FY2025-26, exports reached \$424.3 million, under 10 percent year-on-year (PBS, cited in press reporting, 2025-26). Even so, the industry operates well below its potential. Production still relies heavily on manual, hand-stitched methods. Most synthetic leather and polyurethane inputs are imported. And Pakistan holds less than 1 percent of the fast-growing Chinese sports goods market.

This brief argues that a closer manufacturing and trade relationship with China could help close this gap. This relationship would build on CPEC 2.0 and the zero-duty access under CPFTA Phase II. We call this proposed partnership the "Silk Road Sports Corridor." It rests on four pillars: technology transfer and automation; backward integration into synthetic-material production; direct digital access to Chinese consumers; and stronger institutional and academic support. Pakistani exporters have historically neglected branding and promotion. Paired with a serious promotion effort, the sector could plausibly grow from today's roughly \$424 million in exports toward a \$1.2 billion target by 2030.

This is an aspirational target. It depends on the policy package described here; it is not a forecast that follows automatically from current trends. Figures drawn from published sources are cited to their source. Cost, return, and job-creation estimates are the author's own planning assumptions. These are flagged where they appear and should be tested, not treated as audited numbers.

Introduction

Sialkot has made sports equipment for well over a century. Local craftsmen began repairing footballs for British soldiers in the late nineteenth century. That history built a deep pool of stitching and craft skill that competitors cannot easily replicate. Sialkot's footballs still account for a large share of the world's hand-stitched inflatable balls.

The market around Sialkot has changed a great deal since its export peak in the late 1990s. Machine-stitched, thermo-bonded balls made at scale in China and Southeast Asia now dominate the lower end of the market. Consumers increasingly buy through e-commerce rather than physical retail. The synthetic leather and polyurethane used in modern sports goods come mainly from a small number of countries with strong petrochemical industries, China chief among them. Pakistan's sector has adapted only partially to these shifts.

China's own experience offers practical lessons, not a rivalry to fear. Over two decades, China moved from low-cost assembly to becoming the world's largest sports goods exporter, worth \$28.4 billion in 2024 (China Sporting Goods Federation, 2024). It did this through deliberate investment in automation, domestic materials, branding, and digital retail. Under CPEC 2.0 and CPFTA, Pakistan now has a genuine opportunity. It can draw on Chinese capital, machinery, and market access to modernize its own sector, rather than simply compete against it.

Challenges and Barriers to Growth

Several structural problems limit the industry's growth, even where demand exists. Together, they explain why upgrading will need more than small, incremental steps.

- **Outdated manufacturing technology:** an estimated 80 percent of Sialkot's production is still done by hand, not by machine (SMEDA, 2018, 2021; PSDF/Nielsen, 2016). China, by contrast, relies on CNC-cut, thermo-molded production lines. High machinery costs and limited local financing keep most small firms locked into manual production.
- **Import dependence on raw materials:** Pakistan imports most of the synthetic leather and polyurethane used in balls, gloves, and protective gear. This raises input costs and exposes manufacturers to exchange-rate risk.
- **Narrow market diversification:** Exports remain concentrated in a handful of long-standing Western markets. Penetration of China, one of the largest sports-consumer markets in the world, stays under 1 percent. Weak digital retail presence means most exporters still sell through intermediaries.
- **Low value addition and branding:** Most output is sold as unbranded OEM product, made to another company's specification. This keeps the industry in a low-margin position, despite strong craftsmanship.
- **Weak logistics and customs infrastructure:** Delays along overland routes such as the Khunjerab Pass add cost and time. This is a real disadvantage, since buyers expect short delivery lead times.
- **Limited access to financing:** The sector is dominated by SMEs with limited access to affordable credit, particularly financing for machinery imports.
- **Skill gaps:** Sialkot and Narowal have roughly 36 technical and vocational institutes. Only about 18 percent of their courses are directly relevant to sports manufacturing (PSDF, 2016).
- **Fragmented institutional coordination:** China closely coordinates government, industry associations, and manufacturers. Pakistan's efforts, by contrast, remain spread across individual firms and pilot programs. This is the gap the proposed Pak-China Sports Board is meant to close.

The China Playbook: Lessons for Pakistan

China's rise as the world's dominant sports goods exporter is a useful reference point, both for scale and for method. Its sporting goods exports reached \$28.4 billion in 2024, up 6.8 percent. Fitness-equipment exports grew 22 percent to just over \$5 billion (China Sporting Goods Federation, 2024). China accounted for roughly 43 percent of world sports goods exports in 2022, and 63 percent of world racquet-sports exports (WTO, 2024). Pakistan's exports, by comparison, stand at roughly \$424 million, ranking 17th globally. The scale gap is stark. But it also shows how much room there is to grow from a low base.

Indicator	China	Pakistan
Total sporting goods exports (2024)	\$28.4 billion	\$0.42 billion
Share of world sports goods exports (2022)	43%	n/a (niche categories only)
Share of world ball exports (2022)	n/a	14%
Global export ranking (2024)	1st	17th

Several features of China's growth are directly transferable to Pakistan. Automation multiplied output while cutting per-unit cost. Backward integration into domestic synthetic-leather and PU production is one example; Pakistan could replicate this through joint ventures, rather than building the capability from scratch. Deliberate branding investment let firms such as Anta and Li-Ning move into higher-margin products. Digital retail platforms such as Tmall and JD.com gave manufacturers direct consumer access. And coordinated government policy spanned industrial zones, export incentives, and infrastructure.

Pakistan's Export Trajectory: A Brief History

Pakistan's sports goods exports have followed an uneven path since the 1960s. This history helps explain why a \$1.2 billion target is ambitious, but not implausible.

Period	Trend
1960s–1990s	Exports rose from roughly \$20 million in the mid-1960s to a peak of about \$547 million in 1997-98. Global demand for hand-stitched footballs and cricket gear drove this growth. Pakistan became the world's leading hand-stitched ball supplier.
2000s–2010s	Cheaper, machine-stitched balls from China eroded Pakistan's price competitiveness. Limited investment in automation left exports stuck in the \$300–400 million range.
2020–present	Gradual recovery. Exports reached \$385.5 million in FY2024-25, then \$424.3 million in Jul–Apr FY2025- 26, up 10.08 percent year-on-year (PBS, cited in press reporting). Football exports led this growth, at \$221.9 million, up 19.9 percent. Demand tied to recent and upcoming FIFA World Cups, including 2026, has supported this recovery.

Current exports remain below the 1997-98 peak, nearly three decades later. The industry is not starting from zero; it is recovering from a long plateau. Reaching \$1.2 billion by 2030 will require the structural shift toward automated, technology-intensive production set out in the rest of this brief.

Domestic Usage: A Comparative Study of China and Pakistan

Export performance tells only half the story. How much of a country's sports goods output its own population buys says just as much about an industry's health as export figures do. Here, the contrast between China and Pakistan is sharp.

China's domestic market

China's domestic sports goods market is now one of the largest and fastest-growing in the world. It developed alongside the country's export strength, not instead of it. The domestic sports equipment market was valued at roughly \$18.2 billion in 2024. It is projected to reach \$29.7 billion by 2030, an 8.5 percent annual growth rate (Ken Research, 2026). The broader sportswear market surpassed 500 billion yuan, roughly \$70 billion, in 2025. This continued several years of growth that outpaced the overall apparel and footwear market (Statista, 2026; China Digital Marketing, 2025). China's total sports industry spans goods, services, and events. It produced an estimated 3.84 trillion yuan, about \$540.6 billion, in output in 2024, equal to 1.19 percent of GDP (General Administration of Sport of China, 2025).

Even so, China's domestic consumption still has room to grow. Average annual per-capita spending on sportswear is only about \$40. This is well below comparable economies such as South Korea, where the figure is roughly \$143 (Fidelity International, 2024). Demand is broad-based, spanning fitness, football, basketball, winter sports, and e-sports. Rising disposable income, government fitness campaigns, and major sporting events all reinforce this demand. Younger consumers spend well above the national average: about \$797 a year among the post-2000 cohort (China Briefing, 2025). This points to sustained growth in domestic demand.

Extensive digital and physical retail infrastructure gives this demand somewhere to go, led by platforms such as Tmall and JD.com and domestic brands such as Anta and Li-Ning.

Pakistan's domestic market

Pakistan's domestic market looks very different. The sector is built almost entirely around exports. Sialkot alone produces an estimated 300,000 footballs a day, some 40–65 million a year. Most of this leaves the country. Pakistan earns close to \$1 billion a year in total sports exports (Dawn, 2023; PSGMEA, cited in Türkiye Today, 2026). Domestic consumption, by contrast, is limited almost entirely to cricket equipment. This reflects cricket's position as the country's dominant sport. Football, hockey, and other categories where Pakistan manufactures at scale for export see comparatively little local retail activity. There is no reliable published estimate of Pakistan's total domestic sports goods market size. This gap itself is a sign of how underdeveloped the market is. Industry reporting does point to steady growth in demand for cricket equipment and sportswear, aided by a young population and rising e-commerce access (6Wresearch, 2026; Accio, 2026). Pakistan's sports apparel market is projected to grow at a 7.4 percent compound annual rate between 2025 and 2031. This growth is driven mainly by urban fitness trends, rather than broad-based sports participation.

What the comparison shows

Indicator	China	Pakistan
Domestic sports equipment market size	~\$18.2bn (2024) → ~\$29.7bn by 2030	No reliable national estimate; sector overwhelmingly export-oriented
Domestic sportswear market	>500 billion yuan (~\$70bn+), 2025	Nascent; apparel-led growth at ~7.4% CAGR (2025–31)
Per-capita annual spend	~\$40 and rising	No reliable national figure; concentrated among a narrow urban middle class
Dominant sport(s) driving demand	Broad-based: fitness, football, basketball, winter sports, e-sports	Cricket, almost exclusively
Retail infrastructure	Extensive organized and digital retail (Tmall, JD.com, branded stores)	Limited organized retail; fragmented independent shops
Share of manufactured output sold domestically	Substantial and growing	Small; large majority of Sialkot output is exported

China's experience shows what happens when export manufacturing strength is matched by a deliberately cultivated home market. Brands such as Anta and Li-Ning built domestic scale and brand recognition before expanding internationally. Their domestic market now provides a demand cushion that is largely independent of export cycles. Pakistan's sector, by contrast, has manufacturing capacity without a comparable home market. It has world-class production capability that has not translated into local retail depth, participation infrastructure, or brand-building at home. Broadening domestic sports participation beyond cricket would help. So would encouraging organized retail and Pakistani-branded products, alongside the export push described in this brief. Together, these would give manufacturers a demand buffer against external shocks, and a testing ground for new products before they reach export markets.

Strengths Pakistan Brings to the Partnership

Despite these challenges, Pakistan's sports goods sector carries real, underused advantages. These make it a credible partner for the corridor proposed here, not merely an aid recipient.

- Century-old craftsmanship: a deep, inherited pool of hand-stitching skill, built over more than 125 years. Competitors cannot easily replicate this quickly.
- Globally recognized product quality: Pakistani-manufactured match balls have been used at recent FIFA World Cups. Sialkot's footballs remain a byword for durability internationally.

- **Established export infrastructure:** PSGMEA (300+ registered firms), the ISO 9001:2015-certified and FIFA-standard SIDC facility, TDAP, and the Sialkot Dry Port already provide a working institutional base.
- **Preferential trade access already secured:** GSP+ status gives duty-free access to the EU. CPFTA Phase II gives zero-duty access to China. These are two of the world's largest markets.
- **Diversified product base:** footballs, cricket kits, hockey sticks, gloves, and protective gear give the sector a broader base than many single-product exporters. This spreads demand risk.
- **Competitive, skilled labour:** a workforce that combines low labour costs with genuine craft skill — a combination that is increasingly rare worldwide.
- **Improving ethical-production record:** documented progress on eliminating child labour from ball production strengthens Pakistan's standing with Western and increasingly ESG-conscious buyers.
- **Demonstrated recent momentum:** exports grew nearly 15 percent year-on-year in FY2025-26, even without the structural upgrades this brief proposes. This is evidence of underlying competitiveness that a modernization program would amplify, not create from nothing.
- **Strategic geography and an existing bilateral relationship with China under CPEC,** This gives Pakistan a ready-made channel for the technology transfer and market access this brief recommends.

The Case for Industrial Upgradation

A note on terminology. Earlier drafts of this brief used a single “40 percent” figure for both capacity utilization and production efficiency. These measure different things, and neither figure is backed by a study we could locate. What is well documented is this: roughly 80 percent of production is still manual, and exports remain below the 1997-98 peak despite three decades of global market growth. This is the strongest evidence that the industry is operating below its potential. Except where cited to a published source, the figures below are the author's own planning estimates, not audited projections.

- **Closing the productivity gap:** CNC and molding technology would let Sialkot produce more units per worker, and compete on speed as well as cost.
- **Capturing higher-value production:** modern materials and thermo-bonded construction would let manufacturers produce match-grade goods that command meaningfully higher prices.
- **Diversifying into China:** Pakistan holds under 1 percent of a Chinese sports market that generated roughly \$18.2 billion in total output in 2024 (General Administration of Sport of China, 2025).
- **Reducing import dependence:** domestic synthetic-material production through Chinese joint ventures could lower input costs by an estimated 25 percent. This is a planning assumption, to be tested with a proper feasibility study.
- **Generating skilled employment:** modernization is estimated to create over 120,000 jobs in CNC operation, quality certification, and digital retail management.
- **Strengthening global position:** combining Pakistan's craft reputation with modern technology would narrow the gap with larger suppliers such as China and Vietnam.
- **Return on investment:** an estimated \$170 million invested in technology, logistics, and certification is projected to generate over \$750 million in incremental export revenue over five years. That is roughly \$4.40 per dollar invested, on the author's own modelling.

Materials and Inputs: What the Industry Imports

Synthetic leather is made from polyurethane (PU) or PVC, and sometimes microfiber composites. It has largely replaced genuine leather in modern sports goods, because it is lighter, more water-resistant, and easier to mass-produce consistently. It is now the primary outer material in footballs and other inflatable balls. It is also used in goalkeeper, boxing, cycling, and motorbike gloves; in cricket protective gear such as pads and thigh guards; and in sports bags, cases, and joint supports.

Beyond synthetic leather itself, the sector imports several other inputs. These include PU and PVC resins and pre-coated leather rolls, mainly from China, and to a lesser extent from Italy, Germany, and Vietnam. They also include rubber latex and butyl compounds for ball bladders, industrial adhesives and thermo-bonding films, polyester thread, Velcro tape, and printing inks. The CNC and thermo-molding machinery itself is largely sourced from China and Taiwan. Pakistan's Federal Board of Revenue maintains a duty-drawback scheme (SRO 2009, as amended) covering most of these inputs. This is a useful, underused lever. It could offset import dependence well before any domestic materials plant comes online.

This is also the clearest case for the synthetic-leather and PU-compound facility proposed later in this brief. It would not eliminate every import listed above. But it would address the base material itself, the input where China's own experience shows the greatest benefit from backward integration.

Governance, Demand Drivers and Institutional Support

Existing institutions to build on

Several bodies already operate in the sector. These should be understood as the foundation the proposed Pak-China Sports Board would build on, not replace. PSGMEA, established in 1945 with 300+ member firms, is the industry's main trade body. The SIDC in Daska is an ISO 9001:2015-certified SMEDA facility, built at a cost of roughly Rs. 436 million. It provides thermo-molding capacity, FIFA-standard testing, and training, and is credited with an estimated \$90.2 million in exports and \$31.3 million in import substitution since opening (SIDC, n.d.). TDAP runs exhibitions and trade delegations. TEVTA, PVTC, NAVTTC, and PSDF jointly operate roughly 36 technical institutes across Sialkot and Narowal, though few of their courses are directly relevant to sports manufacturing. SIDC in particular is a working proof of concept: state-backed, industry-facing coordination can succeed here. The proposed board should scale that model, with a bilateral, China-facing mandate, rather than start from scratch.

A thin university connection

The link between Pakistan's universities and its sports goods industry remains thin. SIDC sits next to Imam Bukhari University in Daska largely as a matter of geography, not partnership. Two steps would help. First, a materials-science research partnership between a Pakistani engineering university, such as UET Lahore or NUST, and a Chinese counterpart, feeding into the proposed Faisalabad facility. Second, formal curriculum development in CNC operation, quality certification, and digital retail, run jointly with TEVTA and PVTC, rather than as ad hoc factory training.

What drives demand, and what is already in place

Production rises sharply in FIFA World Cup years. PSGMEA reports that Sialkot's football output climbs to 50–65 million units in tournament years, against roughly 40 million in other years (PSGMEA, cited in Türkiye Today, 2026). Industry reporting already links FY2025-26's export growth partly to demand building ahead of the 2026 World Cup. This is a case for securing long-term supply contracts tied to the tournament calendar. China's own growing consumer market is the second major demand driver; it is addressed in the domestic-usage comparison above. On the policy side, the FBR duty-drawback scheme, GSP+ access to the EU, and SIDC's track record are all existing instruments. This corridor proposal should use them more deliberately, rather than treat them as background context.

Policy Recommendations for the Silk Road Sports Corridor

The recommendations below are organized around the corridor's four pillars, set out in the Executive Summary. This is a deliberate choice, rather than a longer list of separate initiatives. Each pillar brings together the specific instruments needed to deliver it.

1. Technology transfer and automation

Under CPEC 2.0 and CPFTA Phase II, encourage joint ventures between Sialkot manufacturers and Chinese materials and machinery firms. Zero-interest loan schemes should support SMEs importing Chinese CNC and thermo-molding machinery. A dedicated Technology Upgradation Fund would also help. It would offer grants and low-interest loans, alongside public-private partnerships targeting the \$300 million in FDI envisaged under this strategy. Together, these would widen access to upgrading finance beyond individual SME balance sheets.

2. Backward integration into synthetic-material production

A dedicated synthetic-leather and PU-compound facility in Allama Iqbal Industrial City, Faisalabad, would reduce import reliance. On current estimates, it would lower input costs by around 25 percent. In the interim, the existing FBR duty-drawback scheme (SRO 2009, as amended) should be used more deliberately. A clear regulatory framework should also govern the underlying joint ventures and technology-transfer agreements,

from the outset.

3. Direct digital access to Chinese consumers

Access and marketing are different problems. On access, a “Pakistan Sports Pavilion” on Tmall and JD.com would give manufacturers direct consumer reach in China. This should be paired with positioning Sialkot as an OEM base for Chinese brands such as Anta and Li-Ning that are seeking GSP+ access to the EU and US. This strategy has historically neglected promotion. Several steps would help: a “Made in Sialkot” quality mark, used consistently across trade fairs and packaging; subsidized, coordinated participation in fairs such as ISPO Munich, ISPO Shanghai, and the Canton Fair, through TDAP and PSGMEA; a digital marketing budget covering Tmall/JD livestreaming and WeChat; and sports diplomacy, such as sponsorship visibility at bilateral cricket or hockey events, as a brand-building tool in its own right.

4. Institutional and academic support

A bilateral Pak-China Sports Board should build on SIDC's existing coordination role. It should align technical standards and oversee the university partnerships and curriculum work described above. This would give workforce development one coordinated channel, rather than several disconnected ones. Domestic ISO- and FIFA-recognized testing labs, building on SIDC's existing capacity, would reduce dependence on foreign certification. A green customs channel for sports exports at the Khunjerab Pass, and investment in Special Economic Zone logistics, would let Sialkot compete on delivery speed as well as cost. Sports diplomacy should also secure long-term equipment supply contracts with China's growing domestic sports leagues. This ties back to the demand-driver argument made earlier in this brief.

Together, these four pillars form one connected pathway. Backward integration lowers input costs. Automation raises output. Digital retail and promotion broaden reach. Diplomacy and institutional coordination secure long-term demand. Together, they support the sector's transition from roughly \$424 million to a \$1.2 billion export target by 2030.

A Strategic Roadmap

Horizon	Priorities	Expected outcome (author's estimate)
Short term (1–2 years)	Pilot automation in football and glove manufacturing; roll out zero-interest machinery loans; launch the Tmall/JD.com pavilion and branding effort; begin Pak-China Sports Board negotiations.	Unit value on match-grade goods up ~30%; exports toward \$500–550 million.
Medium term (3–5 years)	Scale automation from ~80% manual toward ~60% automated/thermo-bonded; bring the Faisalabad synthetic-materials JV online; complete ISO/FIFA certification labs; streamline Khunjerab customs.	With ~\$300 million in FDI and rising China market share, exports plausibly reach \$800m–\$1 billion.
Long term (5–10 years)	Integrate fully into a technology-driven, export-oriented base; position Sialkot as an OEM and co-branding partner for major sportswear brands.	Approach the \$1.2 billion export target; meaningfully larger China market share; 100,000+ new skilled jobs.

Conclusion

Pakistan's sports goods industry stands at a genuine turning point. Sialkot is built on more than a century of craftsmanship. It has the reputation and skill base to compete internationally. But continued reliance on manual production, imported materials, and a narrow set of export markets has held it back. So has a domestic market that remains almost entirely undeveloped outside cricket. Together, these have kept the industry well below its historical best. Exports once peaked at \$547 million in the late 1990s. They then stagnated for two decades, before beginning a modest recovery that has yet to surpass that peak.

The Silk Road Sports Corridor is anchored in China-Pakistan cooperation under CPEC 2.0 and the CPFTA. It offers a credible way to reverse that stagnation. It combines Chinese technological strength

with Pakistan's manufacturing skill, duty-free market access, and the underused strengths set out in this brief. The proposed \$170 million investment is projected, on the author's own modelling, to return roughly \$4.40 for every dollar spent, alongside a substantial number of new skilled jobs. These are planning estimates, to be tested and refined as the program develops, not audited figures.

This transformation should be pursued carefully. Upgrading should not come at the cost of the traditional craftsmanship, labour standards, and hard-won progress on eliminating child labour that have long defined Sialkot's reputation. Strong institutional oversight will be essential, through the proposed Pak-China Sports Board, working alongside SIDC, PSGMEA, and TDAP, and through a genuine partnership with Pakistani universities. This oversight should ensure that automation complements the skilled workforce, rather than displacing it. Handled with that balance, Pakistan's sports goods industry has a real chance to move past its historical peak. It could re-establish itself among the world's leading exporters, both abroad and, increasingly, at home.

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