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UNLOCKING GROWTH

SEASON 04

The Missing Wardrobe Category

PAKISTAN'S WOMEN'S FORMAL WESTERN WEAR OPPORTUNITY

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TABLE OF CONTENTS

01 Introducing the Opportunity

02 The Local Picture — Pakistan's Position

03 What Is Changing?

04 The Real Barriers

05 Business Model & Economics

06 Local Success Stories

07 Who Should Enter?

— All Sources

01 INTRODUCING THE OPPORTUNITY

A manufacturing base built for other people's brands, and a working-women customer base that has grown 2.6x in 26 years.

THE CATEGORY-CREATION STORY

Pakistan manufactures western clothing for some of the world's biggest brands — Zara, H&M, Levi's — but has barely created a formal workwear category for its own working women.

Pakistani manufacturers already have the fabric, stitching, quality-control, and pattern-making capability to build this category.

WHAT'S MISSING

A Pakistani brand that owns the product, the design, and the customer relationship for its own market, rather than someone else's.

CAPABILITY

Fabric, stitching, QC, pattern-making — already in place

DEMAND

21.41M women in the labour force, 2024-25

GAP

No dedicated local formal workwear category

THE GROWING WORKFORCE

The underlying demand for this category is not hypothetical — it is a large and rapidly growing, measurable customer base.

1998

8.2M

2024-25

21.41M ~2.6x

Female labour force, 13th ICLS — growth over 26 years, almost dhai guna

METRIC	FIGURE
Employed women, 2024-25 (13th ICLS, broader)	**19.33M**
Employed women, 2024-25 (19th ICLS, narrower)	**17.8M**
Target audience — professionals/managers (national) to urban employed women 25+	**2.1M–2.7M**

Source: Pakistan Bureau of Statistics, Labour Force Survey 2024-25 Annual Report (Table 17 — Employed Persons by Major Occupation Groups, Sex and Area; Table 5 — Population by Age, Sex, Area and Nature of Activities).

THE MISSING WARDROBE CATEGORY

FOR MEN — CLEAR, RECOGNISABLE LEVELS

01 A suit for an important meeting

02 A shirt and trousers for a normal office day

03 A polo and chinos for business casual

FOR WOMEN — NOT STANDARDISED ANYWHERE

- Eastern ready-to-wear
- Neighbourhood tailor
- Imported brands
- Casual western pieces adapted for the office

The issue is not that eastern wear cannot be professional — it plainly can be.

THE UNPACKAGED RANGE

No major Pakistani business has reliably packaged interview, daily office, client meeting, weather-appropriate, modest, comfortable, professional into one dependable brand.

02 THE LOCAL PICTURE PAKISTAN'S POSITION

Manufacturing value without brand value, and a scattered market with no player owning the professional-workwear layer.

PAKISTAN'S MANUFACTURING ADVANTAGE

Pakistan's manufacturers already produce garments for some of the largest fashion companies in the world.

GLOBAL BRAND	CATEGORY MANUFACTURED
Zara	Western clothing / fast fashion
H&M	Western clothing / fast fashion
Levi's	Denim, western wear
GAP	Western clothing
Nike	Apparel
Adidas	Apparel

ALREADY IN PLACE

Fabric, stitching, quality control, pattern-making, and large-scale production capability.

BELONGS TO SOMEONE ELSE

The product, the design, the brand, and the customer relationship.

> **The opportunity is not to build a new factory; it is to build a Pakistani-owned brand on top of manufacturing capacity that already exists.**

A FRAGMENTED EXISTING MARKET

Western wear for women is not an empty category in Pakistan — but it is a scattered one, with no single player owning the professional-workwear layer specifically.

LAMA

POSITIONING

General high-street fashion (western + eastern)

KOA (Nishat Linen)

POSITIONING

Broader women's western wear — shirts, trousers, co-ords, dresses, denim, outerwear

Cult-hosted niche labels

POSITIONING

Mostly premium, casual, experimental, or occasion-focused

THE GAP

No brand has yet reached a Pakistani working woman with one dependable system spanning an interview, a daily office day, and an important client meeting. That gap is the opportunity.

03 WHAT IS CHANGING?

Two forces: a launch model that no longer needs multi-city retail, and a professional education pipeline that compounds the customer base every year.

01 E-COMMERCE & DIRECT-TO-CONSUMER

Launching this business today is far easier than it used to be.

PREVIOUSLY

Stores in Lahore, Karachi, and Islamabad

- Rent
- Store fit-out
- Staff
- Inventory

Heavy upfront capital

→

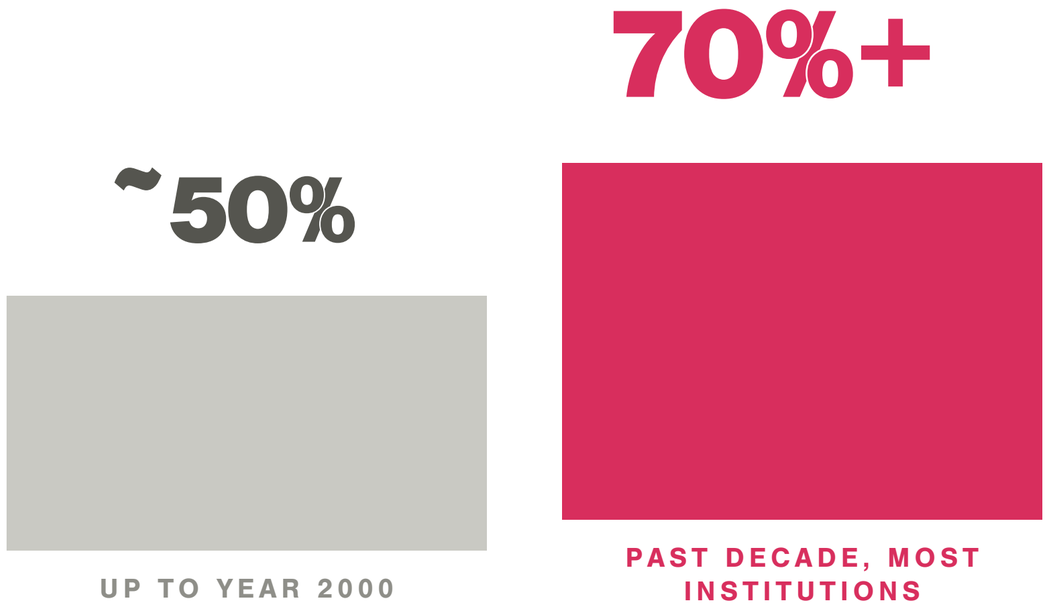
TODAY

A small capsule collection, launched digitally

- Target working women directly through Instagram, TikTok, digital advertising
- Gauge demand through pre-orders and limited drops
- Only reorder the products that actually sell

02 A GROWING EDUCATION PIPELINE

The target customer base is not just large today — it is structurally set to keep growing. Pakistan's medical colleges are a clean illustration of a broader trend in professional education.



This pattern is not limited to medicine — it shows up across professional degree programs generally, where the female share of enrollment has been rising for two decades.

> **This is not only a current-day opportunity; it is one whose addressable audience compounds every year.**

Source: Zaheer A., "The Lost Doctors," Pakistan Journal of Medical Sciences, 2022 (PMC9676596) · Dr Sumera, Punjab Medical College, quoted in Dawn, "Equal number of seats for boys and girls in medical colleges," 2014.

04 THE REAL BARRIERS

Three constraints: a documented cultural signal, a market that has already been experimented in, and cost figures that still need an operator's confirmation.

01 THE CULTURAL CONSTRAINT

> "We had been observing since the inception of our brand, that the sales in women's wear were much lower than our sales in menswear... many young girls don't get permission to wear western clothing [from their families]."

KAMRAN KHURSHEED, FOUNDER, OUTFITTERS — THE EXPRESS TRIBUNE, 2011

Outfitters' women's western wear lagged menswear	→	**Ethnic by Outfitters** — an eastern-wear line families would have no issue with, which became a major growth driver

THE OPEN QUESTION

Can office-appropriate western clothing succeed where casual western wear has struggled, because the two carry a different social signal?

A structured blazer, a wide-leg work trouser, or a modest formal dress may face less resistance than a casual or party-oriented western outfit.

The brand that wins here needs a Pakistani interpretation of professional dressing — not a copy-pasted foreign aesthetic.

Source: Kamran Khursheed interview, The Express Tribune, "An Ethnic transition," 2011 · Profit by Pakistan Today, "Outfitters: How a mould-breaking business model caved in to Pakistani patriarchy," 2017/2022.

02 A FRAGMENTED MARKET, NOT AN EMPTY ONE

Existing players serve adjacent categories — general high-street fashion, broader western wear, or premium/casual/occasion pieces — but none has packaged a complete, reliable workwear system.

LAMA	General high-street fashion
KOA	Broader western wear
Cult-hosted designers	Premium / casual / occasion

That gap has persisted despite genuine market experimentation, which suggests it is a hard problem to solve well, not an overlooked one.

03 UNVERIFIED UNIT ECONOMICS

Every cost figure in this deck's economics section is built from desk research, local pricing benchmarks, and one operator interview from an adjacent garment category — sweatshirts, not formal wear.

TWO NUMBERS TO VERIFY BEFORE COMMITTING CAPITAL

01 Real landed production cost per piece

02 The real retail price a Pakistani formal-workwear brand can command

Both remain to be confirmed directly with a formal-workwear manufacturer.

05 BUSINESS MODEL & ECONOMICS

CapEx, OpEx and unit economics for a small, digital-first women's workwear label — and what it takes to scale beyond it.

THE MODEL

A small, digital-first women's workwear label. No factory, no multi-city retail footprint on day one.

THE OPENING CAPSULE

2	1	2	1
Trousers	Blazer	Shirts or tops	Structured dress or longline outer layer

DESIGN RULES

Neutral, mix-and-match colours, reliable sizing, breathable fabrics

REPLENISHMENT

Only the successful products are reordered

The goal is not twenty designs; it's 6–8 strong products, tested for fit and demand.

TIER 1 — CAPEX

Single founder, 8-SKU capsule, 120–150 units per design (1,000–1,200 pcs total), self-fulfilled, no physical footprint.

TOTAL CAPEX — TIER 1

PKR 1.75M–3.65M

CAPEX ITEM	PKR RANGE
Business registration (sole proprietorship)	**1,000 – 10,000**
Brand identity (logo, guidelines)	**20,000 – 50,000**
Pattern development + samples (8 styles)	**120,000 – 240,000**
Initial production run (1,000–1,200 pcs, landed cost/piece)	**1,000,000 – 2,160,000**
Product photography	**12,000 – 28,000**
Packaging (initial batch)	**25,000 – 50,000**

CAPEX ITEM	PKR RANGE
Launch marketing (first month)	**30,000 – 60,000**
Working capital / cash-flow buffer	**200,000 – 350,000**
Part-time help (QC, dispatch, customer service)	**50,000 – 80,000**
Inventory / accounting tools + legal/trademark	**30,000 – 60,000**
Studio equipment (steamer, dress form, storage)	**20,000 – 50,000**
Contingency (15% of subtotal)	**~227,700 – 472,200**

Source: La Soie (stitching-only retail benchmark) · Hoop Studios (product photography) · Shopify Pakistan pricing · MegaPack.pk (packaging) · Operator interview — sweatshirt manufacturer, Pakistan (landed cost per piece, GSM-based vendor pricing) · HRBS / tconsultingpk (business registration).

TIER 1 — MONTHLY OPEX

OPEX ITEM	PKR / MONTH
Shopify storefront	~7,000
Digital marketing (Meta ads, minimum effective)	30,000 – 50,000
Delivery, per order	150 – 250 / order
Payment gateway fee	2 – 3.5% of transaction

TOTAL MONTHLY OPEX — TIER 1

~PKR 90K – 150K

Fixed monthly cost base before production.

Source: Leopards / TCS courier rate guides (trackmyorder.pk) · PayFast / Rapid Gateway (payment gateway MDR) · Pixel Lattice, Siffar (Meta/Instagram ad cost benchmarks, Pakistan).

UNIT ECONOMICS — FORMAL WESTERN TROUSER

RETAIL PRICE — CONFIRMED

PKR 8,000

CONTRIBUTION, SELL-THROUGH ADJUSTED

3,981–5,811

NET MONTHLY PROFIT, AFTER FIXED OPEX

298K–478K

PAYBACK ON PKR 3M CAPEX

6–10 mo

METRIC	VALUE
Contribution per piece, if 100% of stock sells	**PKR 2,850 – 5,640** (36–71% margin)
Realistic sell-through rate	**65 – 70% of stock**
Estimated units sold per month (of 120–150 produced)	**~90**
Monthly contribution	**PKR 358,000 – 523,000**

A CRITICAL CAVEAT

Fabric and stitching are probably not the biggest margin killers. The real risk is sizing-related exchanges, high return rates, unsold sizes, customer-acquisition cost, and inventory stuck in unpopular cuts or colours.

Competitive advantage cannot be design alone — sizing systems, photography, detailed measurements, easy exchanges, and demand-based production matter just as much.

SCALING UP — TIER 2 AND TIER 3

TIER 1

HOME-STUDIO CAPSULE

8 SKUs, self-fulfilled, no physical footprint

PKR 1.75M–3.65M

TIER 2

FUNDED DTC STUDIO

15–18 SKUs, small studio/back-office, 2–4 staff

PKR 4.85M–9.3M

TIER 3

SCALED MULTI-CITY / RETAIL-BACKED

Physical retail or embellished production, Outfitters-scale

PKR 10M+

TIER 2

Builds on Tier 1's validated model with a larger production run (3,000+ units), a small studio, and 2–4 staff — the same working-capital, hiring, legal, and contingency logic scaled up proportionally.

TIER 3

A genuinely different business — physical retail footprint and/or embellished, structured production, closer to where Outfitters or Ethnic by Outfitters operate. Needs its own operator conversation focused on retail economics.

06 LOCAL SUCCESS STORIES

These are not hypothetical — Pakistani brands are already experimenting in and around this category, at different price points and positioning.

WHO IS ALREADY IN THIS SPACE

BRAND	WHAT THEY DO	WHY IT MATTERS
LAMA est. 2020	High-street, multi-fashion brand, Lahore. Started e-commerce-first, now has stores in Lahore, Karachi, and Islamabad.	Proof that a relatively new Pakistani high-street western-wear brand can build a genuine multi-city presence.
KOA Nishat Linen	Dedicated women's western wear — shirts, trousers, co-ords, dresses, denim, outerwear. Stores in Dolmen Mall Lahore and select Nishat locations.	Shows that large textile groups, not just small entrepreneurs, see opportunity in this category.
Cult platform	Hosts independent Pakistani designers: My Fern (premium linen sets, contemporary separates), Baro Studio (conceptual shirts, trousers), Raa-ay (accessible western basics), Another Sect (western silhouettes + Pakistani handcraft).	Shows real experimentation across prices, cuts, and aesthetics — but positioning stays premium, casual, or occasion-focused, not workwear-specific.
Outfitters / Ethnic by Outfitters	Women's western-wear sales lagged menswear due to family permission constraints on western clothing; this directly led to launching Ethnic, an eastern-wear line, which became a major growth driver.	The clearest real-world data point on the cultural constraint western wear faces in Pakistan, and how a major local player adapted to it.

Source: Lama Retail official site and FAQ (lamaretail.com) · Pakistan Today, "LAMA expands with stylish new outlet at Emporium Mall," 2023 · Nishat Linen USA / KOA by Nishat official pages · The Express Tribune, "An Ethnic transition," 2011.

THE COMMON THREAD

The market clearly wants Pakistani-made western wear — LAMA, KOA, and Cult all prove that. What's missing is not manufacturing capability or customer interest.

It's a brand that packages the full range of a working woman's professional wardrobe into one dependable, category-defining system.

07

WHO SHOULD ENTER?

Three profiles, and the reason each one fits.

THREE PROFILES THAT FIT

01

D2C / digital entrepreneurs

Understand digital marketing and e-commerce and are looking for a focused, underserved category to build in.

02

Existing apparel brands

Can launch a dedicated workwear line or sub-brand using infrastructure they already have.

03

Designers focused on working women specifically

Can build around a Pakistani working woman's actual needs — interview, daily office, client meeting — rather than only casualwear or occasionwear.

THE SHARED NEED

All three are building the same thing: one dependable system that covers an interview, a daily office day, and an important client meeting.

WHAT PAKISTAN HAS, AND WHAT IT LACKS

ALREADY HERE

- The cotton
- The factories
- The designers
- The skill

LAMA, KOA, and Cult prove there is real local demand for Pakistani-made western wear.

STILL MISSING

A Pakistani brand that understands the working woman's professional life, designs a complete workwear system around it, and keeps the brand value — not just the manufacturing value — in Pakistan.

Pakistan already makes western wear for the world. The question is: when will it build a category-defining brand for its own working women?

09 ALL SOURCES

ALL SOURCES

GOVERNMENT & STATISTICAL

Pakistan Bureau of Statistics, Labour Force Survey 2024-25 Annual Report · PBS Report 5 and Report 17 (population and occupation tables).

FIELD INTERVIEW

Operator who ran a sweatshirt-manufacturing business in Pakistan — confirmed vendor pricing structure (GSM-based, all-in per-piece rate) and reference cost points, Aug 2026.

ACADEMIC & EDUCATION DATA

Zaheer A., "The Lost Doctors," Pakistan Journal of Medical Sciences, 2022 · Dawn, "Equal number of seats for boys and girls in medical colleges," 2014.

BRAND & MEDIA SOURCES

The Express Tribune, "An Ethnic transition," 2011 · Profit by Pakistan Today, "Outfitters: How a mould-breaking business model caved in to Pakistani patriarchy" · Lama Retail official site and FAQ · Pakistan Today, LAMA store-expansion coverage · Nishat Linen USA / KOA by Nishat official pages.

COST & PRICING BENCHMARKS

La Soie (local stitching-cost benchmark) · Hoop Studios (product photography pricing, Pakistan) · Shopify Pakistan pricing (bsscommerce.com, avada.io) · Cartiful (e-commerce site cost and marketing budget benchmarks) · MegaPack.pk (packaging unit pricing) · Leopards Courier / TCS rate guides (trackmyorder.pk) · PayFast / Rapid Gateway (payment gateway MDR) · DHL Pakistan / trackmyorder.pk (COD return-rate benchmarks) · Pixel Lattice, Siffar (Meta/Instagram ad cost benchmarks, Pakistan) · Lawrencepur (retail fabric pricing anchor) · HRBS, tconsultingpk, jzarrfilers, kambohassociates (business registration and SECP fee benchmarks) · WaysTax (boutique/physical retail CapEx benchmark).

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