

From Guesswork to Global Growth: Using Research to Eliminate Export Failure & Drive Business Growth Locally



enFuture Insights - A Strategic Marketing Research &
Growth Agency
13th May, 2026





Experience with International Markets

UK, Canada, Philippines, Vietnam, Hong Kong, Thailand, Malaysia, Singapore, UAE, KSA, Afghanistan

23+

Years of experience

800+

studies executed

Hobbies & Passion

- Public speaking
- Travelling
- Health and fitness freak
- Mentoring and coaching – onboard with LUMS for their community mentorship program
- Networking – MAP, LCCI, Rotary Club, Connected Women, OAKS, 101 incredible women

Industry Expertise

Durables | FMCG | Retail | Agri | Paints | Social Sector | Telecom | Apparel | Footwear | Pharma | Finance | Real Estate

Founder of shopper research in Pakistan

Awarded: Simply Excellent Gold award (10x business growth)

Published Reports: 5 major published industry reports



- We help businesses make informed decisions by collecting and analyzing data about customers, competitors, and the market itself.
- We help reduce risk, understand customer needs, and identify market opportunities through systematic inquiry and data analysis.

Telecom ↘



Fashion & Retail ↘



FMCG ↘



Manufacturing & Industrials ↘



Exposure

Consulting & Research ↘



Auto-motive ↘



Health ↘



Others ↘



OUR GLOBAL RESEARCH FOOTPRINT

 B2B, B2C Panel | 8M+

Comprehensive B2B Panel Consumer Researches Across Key Markets



53

COUNTRIES COVERED



Strategic insights from key markets across the world to drive informed business decisions.



Our research network spans **53 countries** across 5 key regions, delivering robust insights from diverse markets worldwide.



NORTH AMERICA

- Canada
- Mexico
- United States



EUROPE

- Denmark
- Germany
- Norway
- Romania
- Russia
- United Kingdom
- Poland
- Italy
- France
- Netherlands
- Spain



ASIA-PACIFIC

- Australia
- Brunei
- China
- India
- Indonesia
- Japan
- Malaysia
- Papua New Guinea
- Thailand
- Vietnam
- Taiwan
- Singapore
- Philippines
- New Zealand
- Korea
- Hong Kong (SAR)



SOUTH AMERICA

- Argentina
- Brazil
- Colombia
- Ecuador
- Guyana
- Chile
- Peru

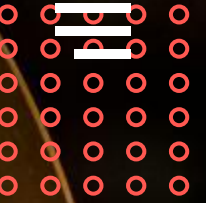


MIDDLE EAST & AFRICA

- Algeria
- Bahrain
- Congo
- Gabon
- Kuwait
- Namibia
- Nigeria
- Oman
- Qatar
- Saudi Arabia
- United Arab Emirates
- Egypt
- Kenya
- Ghana
- Morocco
- Tunisia



The Industrial Crisis (the 'why')



BREAKING THE 12% CEILING: PAKISTAN'S MANUFACTURING CRISIS



EXPORT GROWTH IS NO LONGER OPERATIONAL—IT IS STRATEGIC



1 THE BENCHMARKING GAP

➤ Pakistan's manufacturing GDP contribution sits at **~12–13%**, less than half of China (**~28%**) and Vietnam (**~25%**).



2 THE STRUCTURAL IMBALANCE

➤ An economy anchored by **Services (60%)** and **Agriculture (22%)** without a manufacturing core creates a fragile cycle of weak dollar inflows and persistent trade deficits.



3 THE ECOSYSTEM FAILURE



INTERNAL
Fragmented supply chains, tech-phobia, and a "survival" mindset.



EXTERNAL
A high-friction regulatory environment that inflates the Cost of Doing Business (CoDB).



4 THE VERDICT

➤ We aren't just failing to export; **we are failing to scale.**



However, Global Trade Is No Longer “Business as Usual”



Global supply chains are being reshaped by:



Tariffs



Geopolitical tensions



Rising compliance requirements



Supplier diversification



Buyers are increasingly asking suppliers for:



Compliance visibility



Supplier reliability



Operational transparency



Sustainability standards



The rules of global trade are changing. Adaptability, compliance and transparency are now **competitive advantages.**

Competing Internationally Is More Difficult Than 5 Years Ago



Pakistan's export-to-GDP ratio declined from **15.4% in 1999** to nearly **10.4% in 2024**, indicating weakening export competitiveness.



1. COMPETITION INTENSIFIED

Regional competitors are moving faster:



Bangladesh

→ value-added textiles



Vietnam

→ electronics & global supply chains



India

→ pharmaceuticals & manufacturing integration



2. BUYER EXPECTATIONS HAVE CHANGED

International buyers increasingly prioritize:



Consistency



Compliance



Traceability



Delivery reliability



Supplier resilience



3. PAKISTAN'S CHALLENGE

Pakistan continues to face:



High energy costs



Rising input costs



Lower productivity growth



Limited global integration

Industries still rely heavily on:



Traditional buyers



Price competition



Limited market diversification



Earlier buyers asked:
“What’s your price?”



Today they ask:
“Can you consistently deliver under uncertainty?”

Global Supply Chains Are Diversifying

New Opportunities for Smart Exporters

Businesses are reducing overdependence on a single source and building **resilient, multi-country** supply chains.



The opportunity is global. The advantage goes to those who are **prepared, positioned, and ready to deliver.**





The Opportunity Gap (the what)



GLOBAL FAN MARKET



**\$25 TO \$30
BILLION**

Global Fan Market



**4 TO 5%
CAGR**

Growth from
2020 to 2025



Global Demand of
**ENERGY EFFICIENT
FAN**

growing by

8% Annually

TOP 3 EXPORT CATEGORIES



CEILING FAN

45%



**INDUSTRIAL /
COMMERCIAL FANS**

30%



PORTABLE FANS

25%



Strong global market
driven by urbanization,
rising temperatures &
increasing comfort needs.



Energy efficiency
is becoming a key
purchase driver
worldwide.



Consistent growth
creating long-term
opportunities for
manufacturers.



Export demand remains
strong across all major
fan categories.

TOP FAN EXPORTERS – KEY TAKEAWAYS

GLOBAL FAN EXPORTS CONTINUE TO GROW STRONGLY

2022 EXPORT VALUES (LATEST)

1		CHINA	\$9,800M
2		VIETNAM	\$680M
3		INDIA	\$650M
4		THAILAND	\$280M
5		PAKISTAN	\$75M

Note: 2025 values are projections

GLOBAL FAN EXPORTS ON A STRONG GROWTH PATH



4 – 5% CAGR

2020 – 2025 (PROJECTED)



Large market with strong and consistent growth momentum

KEY INSIGHTS



CHINA DOMINATES

By scale and diversification across all major markets.



VIETNAM GROWS FASTEST

Strong manufacturing focus and export momentum driving rapid growth.



PAKISTAN HAS ROOM TO GROW

Strong base in ceiling fans with opportunity to diversify and expand.



THE OPPORTUNITY IS NOT DISAPPEARING.
COMPETITION IS BECOMING SMARTER.



DIVERSIFY



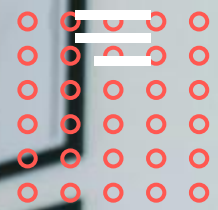
SCALE



INNOVATE



EXPAND



Opportunity Mapping



GCC Markets Continue to Offer Strong Potential



A large, growing and strategically close region with significant opportunities for Pakistani manufacturers.



US\$100+ BILLION

GCC annual imports of manufactured consumer & industrial goods



US\$425 BILLION

UAE imports in goods in 2024



US\$1 TRILLION+ INFRASTRUCTURE PIPELINE

Across GCC (2024–2030) driven by mega projects, urban development, tourism, industrial zones & energy investments.

KEY SECTOR IMPORT OPPORTUNITIES IN GCC (2024)

	Electrical Products & Equipment	~US\$35B+
	Appliances & Home Equipment	~US\$20B+
	Industrial Machinery & Equipment	~US\$25B+
	HVACR (Heating, Ventilation, Air Conditioning & Refrigeration)	~US\$12B+
	Building Materials & Construction Supplies	~US\$30B+
	Other Manufactured Consumer & Industrial Goods	~US\$20B+
	TOTAL RELEVANT IMPORTS	~US\$140B+

WHY GCC MATTERS FOR PAKISTANI MANUFACTURERS



GEOGRAPHIC ADVANTAGE

Shorter routes, lower transit time and cost



COST & TIME EFFICIENCY

Faster deliveries compared to distant global suppliers



STRONG EXISTING RELATIONSHIPS

Established networks and trust open doors faster



RISING DEMAND ACROSS SECTORS

Construction, real estate, energy, retail, hospitality and industrial growth



PREFERENTIAL ACCESS

Pakistan–GCC FTA (PTA) reduces tariffs on many products



KEY TAKEAWAY



Large & growing market of **US\$100B+** in relevant imports



Massive infrastructure pipeline of **US\$1T+** driving long-term demand



Proximity, relationships & access give Pakistani manufacturers a **natural edge**



Strong demand across key sectors aligned with Pakistani manufacturing strengths

Africa: Underrated but Growing



High-growth markets with rising demand and low competition.



**2.5
BILLION**

Africa's population expected to reach by 2050¹



**US\$2+
TRILLION**

Consumer spending in Africa projected to exceed in coming years²



**RISING
URBANIZATION**

Urbanization & electrification driving strong demand for modern consumer goods



**GROWING
DEMAND**

Increasing need for home appliances, fans, electrical goods & consumer durables

WHY AFRICA MATTERS FOR PAKISTANI MANUFACTURERS



**LESS SATURATED
MARKETS**

Lower presence of global brands creates strong opportunity for new entrants.



**LESS COMPLIANCE-
HEAVY INITIALLY**

Relatively easier market entry with manageable regulatory requirements in many countries.



**MORE RELATIONSHIP-
DRIVEN**

Trust, partnerships and local networks play a bigger role—a strength for Pakistani businesses.

KEY LUCRATIVE MARKETS

MARKET	WHY IT'S LUCRATIVE
 Nigeria	 Largest population & economy in Africa; high demand for appliances, fans, electrical goods.
 Kenya	 Strong infrastructure growth, urban middle class & high acceptance of affordable quality products.
 Ghana	 Stable economy with growing construction, retail & electrical goods demand.
 Tanzania	 Rapid urbanization, housing projects & rising need for home appliances and fans.
 Egypt	 Large market, strong purchasing power & gateway to North and East Africa.



KEY TAKEAWAY



Large & young population driving long-term demand across categories.



Low competition, high potential for market leaders.



Right partnerships & local presence can unlock sustainable growth.



Africa offers scale, opportunity & strong future potential.

Mid-Sized Emerging Markets

Less competition. More access. Strong potential.



OVERLOOKED OPPORTUNITIES

Many exporters focus on saturated developed markets.



UNTAPPED POTENTIAL

Mid-sized markets offer high demand with lower competition.



EASIER ACCESS

Simpler entry, stronger relationships and better distributor access.



PRICING FLEXIBILITY

Better pricing power and higher margins are possible.

KEY LUCRATIVE MID-SIZED MARKETS

MARKET	WHY IT'S LUCRATIVE
 Uzbekistan	 Industrializing economy with rising demand for electrical products, machinery and appliances.
 Kazakhstan	 Growing middle class and large-scale infrastructure investments.
 Côte d'Ivoire	 Rising electrification, construction and retail growth boosting demand.
 Bangladesh	 Large population, strong purchasing power in segments and export gateway to South Asia.
 Sri Lanka	 Import-dependent market with steady demand for appliances and electrical goods.
 Vietnam	 Fast-growing economy, expanding retail sector and rising demand for consumer durables.
 Morocco	 Strategic hub to access North and West Africa; growing industrial and consumer demand.
 Philippines	 Strong remittances, urbanization and rising need for affordable consumer goods.

WHY MID-SIZED EMERGING MARKETS MATTER



LOWER COMPETITION

Fewer global brands and local players create space for new entrants.



EASIER DISTRIBUTOR ACCESS

Distributors seek reliable partners and long-term relationships.



BETTER PRICING FLEXIBILITY

Ability to offer competitive pricing while maintaining healthy margins.



KEY TAKEAWAY



Mid-sized markets offer high demand with low competition.



Stronger relationships lead to long-term market presence.



Better pricing flexibility helps maximize margins and profitability.



Smart focus on the right markets can accelerate sustainable growth.

OEM / Private Label Opportunities

A smart path for Pakistani manufacturers to plug into global brands without building brands or spending heavily on marketing.



KEY FACTS & FIGURES

GLOBAL PRIVATE LABEL MARKET EXPECTED TO EXCEED

US\$1 TRILLION+
GLOBALLY IN COMING YEARS.



INTERNATIONAL BRANDS INCREASINGLY OUTSOURCE:



Manufacturing

End-to-end production by trusted partners



Assembly

Efficient assembly and integration



Component Production

Specialized parts and components



WHY THIS MATTERS

PAKISTANI MANUFACTURERS MAY NOT NEED TO:

- ❌ Build global brands immediately
- ❌ Spend heavily on marketing abroad

INSTEAD:

- ✅ Manufacture for existing brands
- ✅ Enter through OEM / private label partnerships

WHERE BUYERS FIND SUPPLIERS



ALIBABA

Large supplier base and competitive pricing.



GLOBAL SOURCES

Verified suppliers and trade assurance support.



LINKEDIN

Professional networking and supplier discovery.



SOURCING PLATFORMS

Specialized platforms for category-focused search.



KEY TAKEAWAY

OEM / private label partnerships allow Pakistani manufacturers to grow with global brands, build long-term relationships and scale sustainably.



GLOBAL COMPETITION IS INTENSIFYING – BUT SO IS OPPORTUNITY

THE GLOBAL COMPETITIVE LANDSCAPE FOR PAKISTAN'S FAN INDUSTRY



Rising temperatures, urbanization and energy efficiency mandates are **expanding global cooling demand** across new markets and product segments.



+4% to +6%

Global fan market projected CAGR through 2030

Source: Grand View Research



1. GLOBAL COMPETITOR MOMENTUM



CHINA: GLOBAL LEADER

- Largest exporter of fans by a wide margin
- Scale, integrated supply chains and strong cost competitiveness



VIETNAM: RISING FAST

- Explosive export growth in recent years
- High-tech manufacturing, FDI inflows and export-focused policies



INDIA: EXPANDING AGGRESSIVELY

- Large domestic base and government incentives fueling exports
- Strong focus on quality and branding



China dominates the market, while Vietnam and India continue to expand aggressively.



2. PAKISTAN'S COMPETITIVE GAPS



INCENTIVE GAP

Competing countries offer significantly stronger export incentives, financing support and manufacturing facilitation.



COMPLIANCE BARRIER

Limited local testing & certification infrastructure increases dependence on external compliance support.



WEAK EXPORT DIVERSIFICATION

High concentration in ceiling fans and a few low-to-mid income markets limits growth and increases risk.



LIMITED GLOBAL BRAND PRESENCE

Reliance on intermediaries and lack of strong global brands restricts premium market access.



DATA DEFICIT

Export figures vary widely (\$40M–\$70M) due to inconsistent data; unified, reliable research is needed to track true progress.



3. PAKISTAN'S STRATEGIC ADVANTAGES



STRONG MANUFACTURING CLUSTER

Gujrat & Gujranwala account for nearly 90% of Pakistan's fan manufacturing capacity.



CUSTOMIZATION & FLEXIBILITY

Strength in customization, low-volume production and engineering flexibility gives a competitive edge.



COMPARATIVE ADVANTAGE

Pakistan's domestic fan industry has Revealed Comparative Advantage (RCA > 1), indicating export potential.



STRATEGIC GEOGRAPHIC LOCATION

Proximity to GCC, Africa, Central Asia and South Asia offers logistics and market access advantage.



GROWING GLOBAL OPPORTUNITIES

Global shift to energy-efficient, DC & smart fans and 'China+1' sourcing trend open doors for new players.



THE QUESTION IS NO LONGER WHETHER PAKISTAN CAN MANUFACTURE.
THE QUESTION IS WHETHER PAKISTAN CAN COMPETE STRATEGICALLY.



NEW MARKETS
TO EXPLORE



COMPETITIVENESS
TO IMPROVE



COMPLIANCE
TO ACHIEVE



BRANDS
TO BUILD



INNOVATION
TO LEAD

CLIMATE CHANGE IS RESHAPING GLOBAL COOLING DEMAND

RISING TEMPERATURES ARE CREATING NEW COOLING OPPORTUNITIES GLOBALLY



Higher temperatures, urbanization and energy efficiency mandates are **expanding the global fan market** across new geographies and segments.



+4% to +6%
Global fan market projected
CAGR through 2030

Source: Grand View Research

1 EUROPE COOLING DEMAND RISING



- ✓ Europe is warming faster than the global average.
- ✓ Heatwaves are driving higher adoption of fans and cooling solutions across households.
- ✓ EU cooling demand is one of the fastest-growing energy segments.

Sources: Washington Post (2025), Cool Heating Coalition, WIRED

2 GCC (IRAQ & UAE) VOLUME MARKETS



- ✓ Strong infrastructure, construction and real estate growth continue to drive cooling demand.
- ✓ Iraq & UAE remain the primary volume drivers for Pakistani fan exports.

Sources: TDAP Fan Industry Report, GCC Construction Outlook Reports

3 AFRICA UNTAPPED POTENTIAL



- ✓ Africa's urban population is projected to nearly double by 2050 (UN).
- ✓ Rising incomes, electrification and urbanization are boosting appliance and fan demand.

Sources: UN World Population Prospects 2022, World Bank

4 ENERGY-EFFICIENT FANS THE NEXT GROWTH SEGMENT



- ✓ Global shift toward energy efficiency and lower electricity consumption.
- ✓ DC fans and inverter technology are gaining strong traction worldwide.

Sources: Cool Heating Coalition, IEA – The Future of Cooling



CLIMATE CHANGE IS NOT JUST AN ENVIRONMENTAL SHIFT—
IT IS RESHAPING FUTURE EXPORT OPPORTUNITIES.



NEW MARKETS



GROWING DEMAND



COMPLIANCE MATTERS

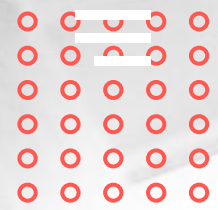


ENERGY EFFICIENCY
DRIVES VALUE

Note: Data and projections are indicative.



The Research Playbook (the 'How')



THE REAL COST OF "GUESS-BASED" DECISIONS

A Failed Export Attempt Costs:

- 12–24 months lost
- Dead inventory
- Distributor conflicts
- Brand damage in the market

Critical Question:

- Why invest millions in production without validating demand first?



REGIONAL DEMAND INTELLIGENCE

One Size Does Not Fit All – Research-Driven Market Alignment

Region	Primary Demand	Market Nuance (The "Why")	Strategy
Africa	Bracket & Louver Fans	Structural Constraint: Low roof heights make traditional ceiling fans impractical. Focus on durability/repairability.	Volume Play: Durable, high-air-throw wall units.
Middle East	Exhaust & Ceiling Fans	Utility Need: High popularity for ventilation (Exhaust) alongside premium aesthetics for interiors.	Premium Play: Silent, sleek designs for the "Premium Homemaker".
Global	Energy Efficient / DC	Macro Trend: Demand for energy-efficient fans is growing at 8% annually .	Innovation Play: Inverter fans for the "Utility Optimizer".

MARKET SELECTION – STRATEGIC DECISION MATRIX

To minimize export failure, members must answer four "Critical Filters" before entering a new territory:

Strategic Question	Research Output
1. Is there a "Structural Gap"?	Analysis of local production vs. import reliance (e.g., KSA imports 80% of food needs). Is demand growing or replacing old technology?
2. What is our "Landed Cost" reality?	Comparison of Pakistani FOB (Free on-board) + Logistics + Duties against local price leaders to ensure we aren't "priced out". Can you compete after landed cost?
3. Does the "Cultural Fit" exist?	Assessment of local aesthetics (Minimalist vs. Traditional) and technical specs (Voltage/Plug types).
4. Can we clear the "Regulatory Wall"?	e.g. market specific certifications' timelines and complexity.

UNDERSTANDING THE BUYER

Export Failure = Misunderstanding the Buyer

Different markets = different expectations

GCC Buyers Want:

- Silent fans
- Aesthetic design
- Energy efficiency

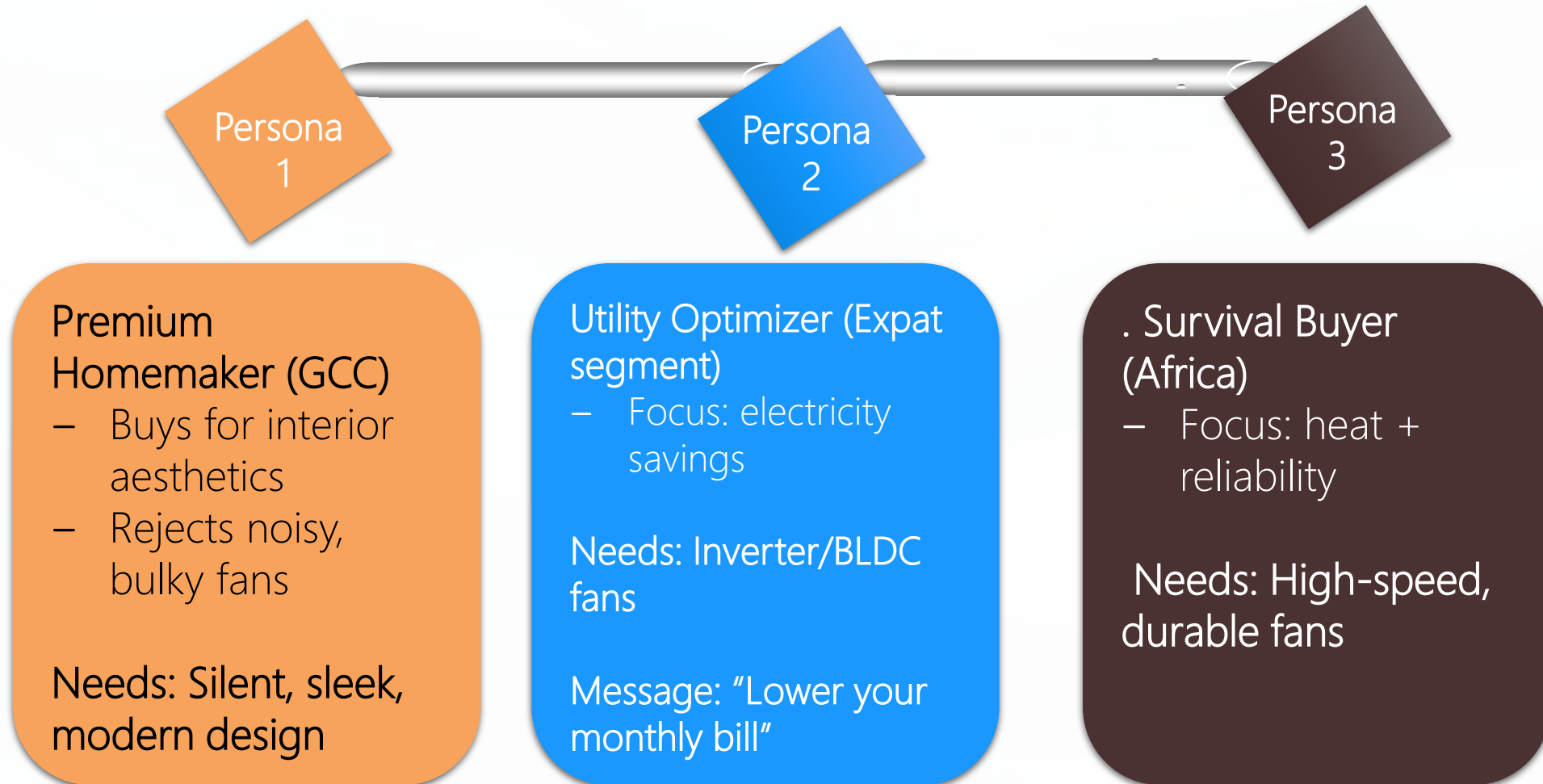
Africa Buyers Want:

- Strong air throw
- Durability
- Repairability



BUYER PERSONAS (MENA/GCC REGION)

Research-driven profiles to guide product development:





PRODUCT STRATEGY FOR EXPORT SUCCESS

Building the **Right Product Mix** for the **Right Market**



GCC MARKETS



WHAT BUYERS PREFER

- Premium aesthetics & minimalist designs
- Silent operation
- BLDC & energy-efficient models
- Smart/home-integrated appliances



PRODUCT DIRECTION

- Designer ceiling fans
- Premium finishes & colors
- Slim, modern product styling



AFRICAN MARKETS



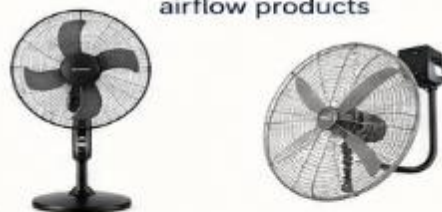
WHAT BUYERS PREFER

- Durability & affordability
- Strong airflow performance
- Easy maintenance
- Functional products over premium styling



PRODUCT DIRECTION

- Rugged pedestal & wall fans
- Value-engineered models
- High-performance airflow products



SOUTH & SOUTHEAST ASIA



WHAT BUYERS PREFER

- Energy efficiency
- Compact designs for smaller homes
- Multi-purpose utility products
- Mid-price segment offerings



PRODUCT DIRECTION

- BLDC & inverter-compatible fans
- Compact household appliances
- Practical everyday-use products



DEVELOPED EXPORT MARKETS



WHAT BUYERS PREFER

- Compliance-ready products
- Low-noise operation
- Sustainable & energy-efficient appliances
- Clean packaging & modern design language



PRODUCT DIRECTION

- Certified energy-efficient SKUs
- Premium packaging
- Refined product finishing & documentation



WHAT RESEARCH HELPS IDENTIFY



CONSUMER NEED

Silent vs high-speed
Premium vs functional
Smart vs affordable



DESIGN PREFERENCE

Minimalist
Decorative
Compact
Industrial



USAGE ENVIRONMENT

Climate
Housing size
Urban vs rural usage



PRODUCT-MARKET FIT

Which product category has the strongest demand in each region



KEY MESSAGE

Winning export products are not generic.

Manufacturers must adapt product mix, design, and functionality to local consumer expectations and market realities.



Where You Win Matters as Much as What You Sell

GCC:

- Modern retail (Carrefour, Danube)
- E-commerce (Noon, Amazon)

Africa:

- Distributor-led markets
- Wholesale dominance

Key Decision:

Direct retail vs distributor strategy





THE PRICING PUZZLE

Identify the "Premium" Your Brand Can Command



BENCHMARKING: KNOW YOUR POSITION

Side-by-side technical & price comparison vs. top global brands

	Performance ★★★★★	Efficiency ★★★★★	Noise Level ★★★★★	Features ★★★★★	Price Position Low / Mid / Premium
--	-----------------------------	----------------------------	-----------------------------	--------------------------	--

Find gaps. Differentiate. Justify your price.

PRICE ELASTICITY: KNOW THE PREMIUM POTENTIAL

How much more will buyers pay for key value drivers?

Price ↑ 10% and demand drops sharply

Wrong Positioning
You lose volume & market share

Price ↑ and demand holds

Premium Opportunity
You capture more value



THE GOAL

Move from cost-based pricing to value-based pricing
Right price. Right market. Higher margins.



Better Positioning



Stronger Margins



Stronger Exports



POSITIONING & BRAND STRATEGY

Learning from Pakistan's Leaders to Win Globally

WHAT RESEARCH UNCOVERS



Market Segmentation
Identify high-value customer segments.



Consumer Preferences
Understand what buyers value most: performance, design, efficiency, or price.



Feature Prioritization
Know which features drive purchase decisions in each market.



Competitive Benchmarking
Compare global brands on quality, features & perception to find gaps.



EXAMPLES: HOW PAKISTANI FAN BRANDS CAN WIN GLOBALLY

G.F.C
FANS

Performance Leader



PAK FAN

Value for Money



ROYAL

Premium Design



Khursid
FANS

Innovation Leader



BELVIN

Modern & Efficient



-lite
APPLIANCES

Energy-Saving Lifestyle



KEY LEVERS FOR WINNING POSITIONING



Lead with a Clear Promise
Own a winning attribute that matters most in your target market.



Build a Distinct Brand Identity
Differentiate on performance, innovation, lifestyle or design—consistently.



Communicate the Value
Highlight real benefits that justify your premium and build trust.



THE TAKEAWAY



Strong Differentiation
Stand out in crowded markets



Premium Pricing Power
Justify 15–20%+ premium



Stronger Brand Loyalty
Repeat buyers & advocacy

THE PEFMA INTELLIGENCE HUB

End-to-End Intelligence. Real Insights. Better Decisions.



Market Intelligence Support

Find the right export markets and products with the highest demand potential.



Competitive Intelligence Support

Benchmark against global competitors and uncover opportunities to win more market share.



Customer & Supplier Intelligence

Understand buyer needs and identify reliable partners to build stronger, long-term export networks.



Investment Intelligence Support

Evaluate feasibility and investment options to scale, diversify or form strategic partnerships.



Product Intelligence Support

Track prices, trade data and customer feedback to optimize products, pricing and compliance.

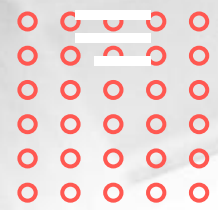


Market Structure & Regulatory Assessment

Navigate regulations, identify supply chain gaps and ensure smooth market entry.

ENFUTURE EXPORT GROWTH FRAMEWORK





Case Studies



Feasibility Study – Industrial Product

Client Objective	What We Did	Business Impact
To assess market attractiveness, growth potential, and competitive landscape of the Pakistan Tubular Battery market	Conducted comprehensive market sizing, forecasting, competitive mapping, demand analysis, and risk assessment through primary and secondary research	Enabled the client to enter the market with a well-informed strategic approach, minimizing investment risk and avoiding potential business losses through early visibility of market dynamics, growth areas, and competitive threats.

“This research helped us navigate in these challenging times and we averted risk **of 500-600 million**” (Chief Innovation Officer)

Trade Visibility - Durables

Client Objective	What We Did	Business Impact
To evaluate in-store visibility effectiveness and shopper conversion drivers	Conducted retailer trade visibility and asset impact assessment across 353 outlets	Helped Client optimize retail visibility strategy to improve shopper engagement and conversion
To benchmark Client against key competitors	Assessed brand visibility, retailer preference, and conversion strength across leading brands	Identified Client's strong conversion and trust equity while highlighting opportunities to strengthen early-stage visibility
To identify high-impact trade assets for future investment	Evaluated effectiveness and ROI of trade assets across cities and outlet types	Enabled Client to prioritize high-performing display walls, improving retail execution and marketing investment efficiency

MARKET RESEARCH PARTNER FOR GO-TO-MARKET STRATEGY

China Residential Electric Fan Market



CLIENT BACKGROUND

International player in consumer appliances & ventilation segment

CLIENT OBJECTIVES



Identify market drivers, restraints & policy influence shaping demand



Understand role of national & regional government policies in market growth



Analyze manufacturer landscape, particularly state-owned enterprises



Validate econometric modeling methodology used for estimates



Benchmark & assess market positioning of leading players

KEY MARKET INSIGHTS



Large & Growing Market

Strong growth outlook driven by urbanization, rising living standards & need for affordable cooling.



Key Growth Drivers

Urbanization, hot climate, energy efficiency awareness & demand for affordable cooling.



Market Challenges

Intense competition & seasonal demand create pricing & margin pressures.



Opportunities Ahead

Rural market penetration, product diversification & sustainability-led innovation.



POLICY IMPACT SNAPSHOT



Made in China 2025 Initiative

- Driving R&D, automation & quality upgrades
- Focus on energy-efficient & sustainable manufacturing
- Government incentives accelerating industrial competitiveness



14th Five-Year Plan (2021–2025) for National Energy-Saving

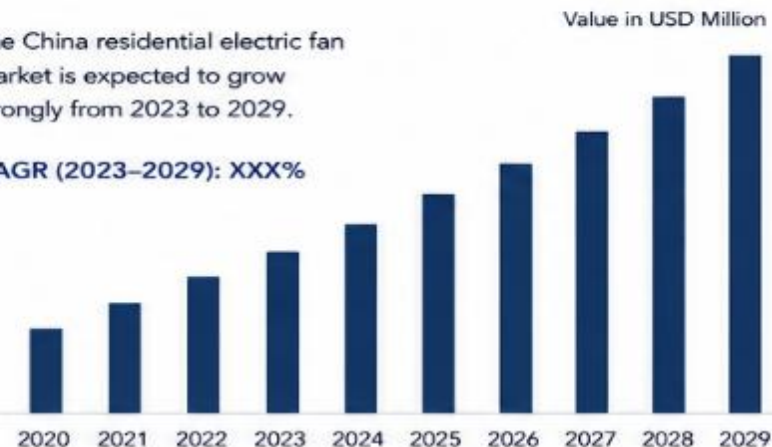
- Promoting energy efficiency & green technologies
- Boosting clean energy & smart grid adoption
- Encouraging green finance & infrastructure modernization



MARKET OUTLOOK

The China residential electric fan market is expected to grow strongly from 2023 to 2029.

CAGR (2023–2029): XXX%



THE TAKEAWAY



Data-driven insights for better market positioning



Actionable intelligence to navigate state policies & market dynamics

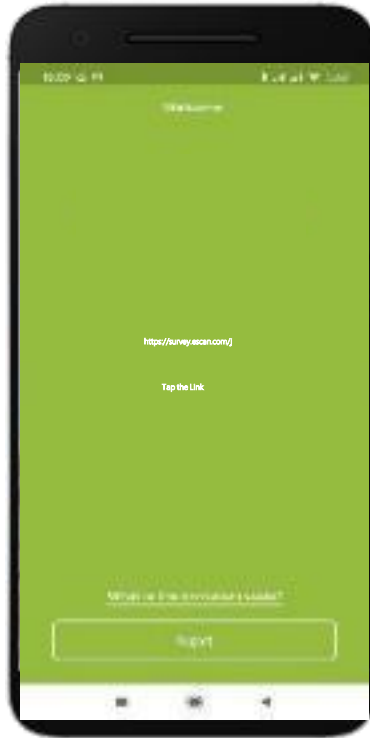


Stronger strategy for sustainable growth & global competitiveness

Case Study

- **Business issue:** Ramadan is a special occasion in the Muslim world. People share and care for those in need. Brand X sought to establish relevance with its **audience.**
- To guide the content strategy, Brand X has experimented with digital characters for the first time and wanted to engage with kids, also developing a softer image of the brand.
- The **hypothesis is that the ad isn't focusing much on the product and will not be able to hook the audience.**

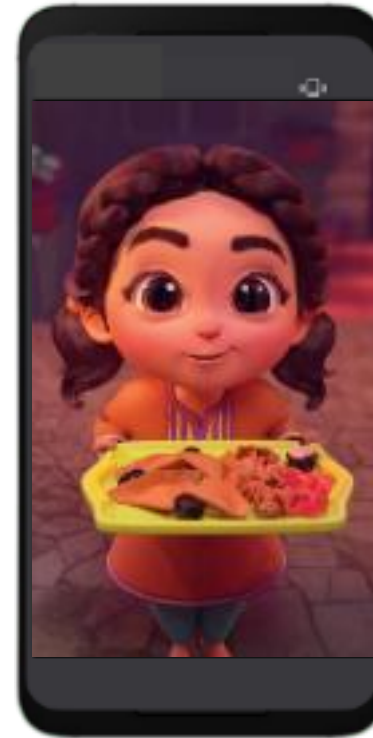
Methodology Ad Test through E-Scan



1.
Click the
link



2.
Adjust the
Webcam



3.
Watch the
ad



4.
Take a
post-test
survey

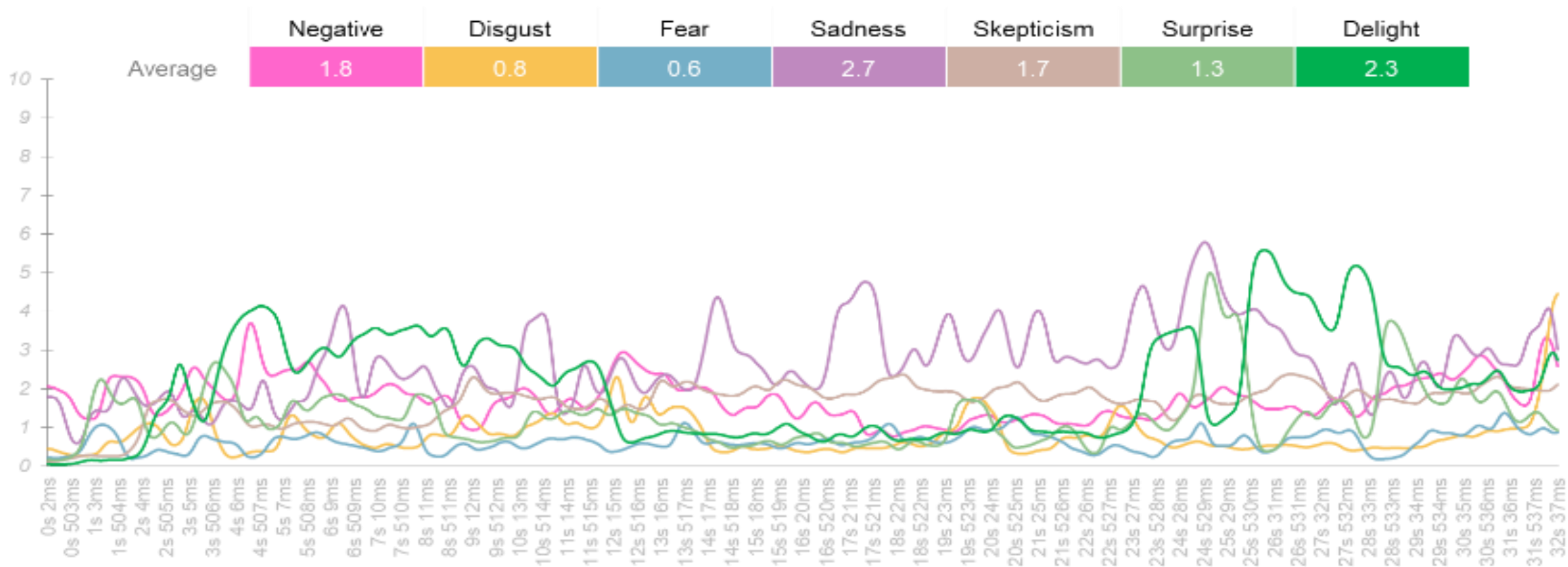
Example – Ad Test (how emotion and eye tracking is done)



Sadness appears to be the most prevailing emotion

AUDIENCE FACIAL CODING TIMELINES

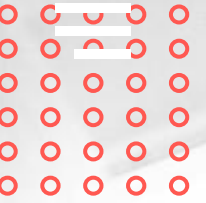
Higher value indicates a more prevailing emotion



Client optimized the ad while removing scenes causing sadness and add fillers to strengthen the brand image in the ad.



Practical Framework





**PRACTICAL
FRAMEWORK**

BEFORE ENTERING ANY NEW MARKET, ASK THESE 5 QUESTIONS

The right answers reduce risk. The right research drives growth.

1



IS DEMAND REAL?

- Market size & growth potential
- Actual consumption vs import/export data
- Seasonality & trend direction
- Customer needs & usage patterns



WHY IT MATTERS

Avoid chasing hype. Validate the real opportunity.

2



WHO ARE THE COMPETITORS?

- Key players (local & international)
- Market share & positioning
- Strengths, weaknesses & strategies
- New entrants or emerging threats



WHY IT MATTERS

Know who you're competing with—and how you can win.

3



WHAT PRICE BAND DOMINATES?

- Price range analysis
- Premium vs mid vs economy segments
- Price sensitivity of customers
- Room for positioning & differentiation



WHY IT MATTERS

Price right. Too high—you lose. Too low—you lose margin.

4



WHO CONTROLS DISTRIBUTION?

- Key distributors & dealers
- Channel structure & reach
- Influence & decision makers
- Shelf space, incentives & loyalty factors



WHY IT MATTERS

Even the best product struggles without the right distribution power.

5



WHAT HIDDEN BARRIERS EXIST?

- Regulations & certifications
- Import duties & trade policies
- Cultural & language factors
- Payment terms, legal risks & political stability



WHY IT MATTERS

Hidden barriers can kill a good opportunity before you start.



**ASK THE RIGHT QUESTIONS.
ENTER WITH CONFIDENCE.**



RESEARCH



INSIGHT



STRATEGY



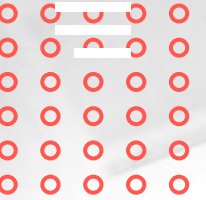
GROWTH



**BETTER DECISIONS.
STRONGER EXPORTS.**



**Growth is not only
International**



1 PAKISTAN'S APPLIANCE MARKET

Still Growing Strong

PKR 420 BILLION
Household appliance industry revenue in 2024 (↑ 47% YoY)

3.8 MILLION UNITS
Total production of household appliances (up from 3.6 million units)

40+ MILLION HOUSEHOLDS
And the number is continuing to grow

- KEY GROWTH DRIVERS**
- Urbanization**
Over 36% of population lives in urban areas (2023)
 - Rising Incomes**
Middle class expansion is driving appliance adoption
 - Housing Growth**
1.7 million housing units needed by 2030 (Planning Commission)
 - More Appliance Adoption**
Increasing ownership across urban & rural households

The local market is becoming more competitive — but also more segmented and opportunity-rich.

2 CONSUMER PREFERENCES ARE CHANGING

Consumers Want More Than Just Price



“ Earlier, a fan was just a fan. Today consumers compare energy consumption, design, noise level, durability & after-sales support. ”

3 DISTRIBUTION STRENGTH IS A COMPETITIVE ADVANTAGE

Many manufacturers lack visibility into what really drives sales.

- Dealer Profitability?
- Retailer Preferences?
- Geographic Demand Differences?
- Inventory Movement?
- Brand Pull vs. Dealer Push?



In many categories, distributors influence brand success more than advertising.

4 NOT EVERY CONSUMER WANTS THE SAME PRODUCT

The market has clear segments—each with different needs.



Companies that understand consumer segments better often grow faster—even with similar manufacturing capability.

5 BRAND PERCEPTION DRIVES PRICING POWER

Strong brands build trust. Trust builds business.

- WHAT BUILDS STRONG BRAND PERCEPTION?**
- Consistent Quality
 - Innovative Products
 - Reliable After-Sales Service
 - Wide Availability
 - Effective Communication



Strong brands compete less on price—and protect margins better.

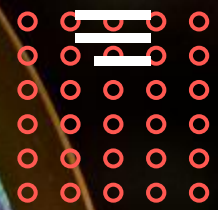
6 FAN DEMAND IS LINKED TO STRUCTURAL GROWTH

Multiple factors are supporting long-term fan demand in Pakistan.

- Housing Growth**
Rising construction & housing schemes increase fan demand.
- Electrification**
Around 74% of Pakistan's population has access to electricity (2023).
- Urban Population Growth**
Urban population expected to reach 42% by 2030.
- Rising Middle Class**
More households upgrading to better quality products.

Market Snapshot

- 20+ MILLION** Fans sold annually (domestic estimate)
- 70%+** Demand comes from replacement market & existing households
- Significant local growth pockets still exist.



Summing Up...



PAKISTAN'S COMPETITIVE REALITY IN THE GLOBAL FAN INDUSTRY

Strong manufacturing capability — but competitiveness gaps remain

PAKISTAN'S MANUFACTURING STRENGTHS



STRONG MANUFACTURING CLUSTER

Gujrat & Gujranwala account for nearly **90%** of Pakistan's fan manufacturing capacity.

Source: PBC



FLEXIBLE & CUSTOM MANUFACTURING

Known for low-volume flexibility, customization capability and entrepreneurial agility.

Source: Pakistan Engineering Goods Strategy



COMPETITIVE PRODUCT QUALITY

Industry comparisons show Pakistani fans compete well on quality versus India & China.

Source: PBC



GEOGRAPHIC EXPORT ADVANTAGE

Strong proximity to GCC, Africa, South Asia and Central Asia creates regional export potential.

Source: Pakistan Engineering Goods Strategy

VS

WHAT IS HOLDING PAKISTAN BACK?



HIGH COST OF PRODUCTION

Imported raw materials account for **70–80%** of production costs in many cases.

Source: PBC



WEAK EXPORT DIVERSIFICATION

Exports remain concentrated in low-income markets, limited regions and ceiling fan category.

Source: TDAP



CERTIFICATION & COMPLIANCE BARRIERS

Only a modest proportion of firms hold CE, UL, SABS certifications despite growing global demand.

Source: UNIDO



LIMITED GLOBAL BRAND PRESENCE

Industry reports highlight dependence on foreign agents and limited direct market presence abroad.

Source: TDAP



PAKISTAN HAS THE CAPABILITY TO COMPETE GLOBALLY.
THE CHALLENGE IS BECOMING STRATEGICALLY COMPETITIVE.





PAKISTAN CAN COMPETE — BUT STRATEGY MUST IMPROVE



We have the capability. The opportunity is real.
Now, we must make smarter, data-driven decisions to win.



PAKISTANI MANUFACTURERS ARE CAPABLE

- Skilled workforce
- Strong manufacturing base
- Proven track record of quality
- Ability to meet global standards



OPPORTUNITY EXISTS

- Global sourcing is diversifying
- New and emerging markets are growing
- Demand for quality products continues to rise



GROWTH MUST BECOME DATA-DRIVEN

- Understand markets better
- Know your competitors
- Identify the right opportunities
- Make informed, confident decisions



RESEARCH REDUCES COSTLY MISTAKES

- Avoid wrong market choices
- Minimize risks and losses
- Save time, money and resources
- Improve margins and sustainability



Right Market Selection



Competitor Intelligence



Distributor & Channel Insights



Demand & Price Understanding



Risk & Compliance Awareness



EXPORT DECISIONS. BACKED BY RESEARCH.



Better Insights. Better Decisions. Better Results.



Stronger Business. Sustainable Growth.



LET'S WORK TOGETHER

Contact: Majida Naveed
Founder & MD, enFuture Insights
Majida@enfuture.net
www.enfuture.net

