Pakistan's Home Appliances Sector

Investment Pitch Book

1. Why Pakistan

As China upgrades its economy by harnessing and deploying the new frontier of New Quality Productive Forces, Chinese traditional industries including the home appliance manufacturers seek to combine cost efficiency, policy certainty, and long-term market depth. Pakistan stands out as a viable partner at this inflection point.

Anchored by the All-Weather Strategic Cooperative Partnership and China–Pakistan Economic Corridor (CPEC), Pakistan offers an industrial value chain into a high-growth consumption market and a multi-region export platform. With rising domestic demand, competitive production economics and a clear government commitment to industrial localization, Pakistan presents itself both as an alternative manufacturing location and a growth partner.

The convergence of demographic scale, geographic advantage, and policy alignment makes the current Pakistan window uniquely compelling for entry of Chinese enterprises.

2. Pakistan Investment Highlights

Pakistan's home appliances sector presents a strong investment case driven by five core factors.

First, Pakistan is a rapidly expanding domestic market underpinned by urbanization, electrification, and a growing middle class.

Second, Pakistan offers competitive manufacturing enabled by favourable labour economics, localized raw material availability, and competitive utility tariffs, particularly within Special Economic Zones.

Third, Pakistan's geographic location and its preferential access to regional and global markets through FTAs with China and the future FTA with countries member of the Gulf Cooperation Council and the GSP Plus scheme with the European Union.

Fourth, strong government backing reflected in tariff protection against imports, fiscal incentives for localization, and fast-track facilitation mechanisms for foreign investors.

Fifth, CPEC-enabled connectivity positions Pakistan as a production and export corridor linking China with the Middle East, Africa, and Central Asia.

3. Market Overview and Opportunity

Pakistan's home appliances market currently stands at approximately USD 1.18 billion and is expected to grow steadily. Demand is visible across refrigerators, air conditioners, washing machines, and small appliances reflecting rising household penetration and improving purchasing power.

Demographic fundamentals provide durable demand momentum. Pakistan's population of 251.27 million, with a median age of 20.8 years and an urbanization rate of 2.7 %, creates both a large consumer base and a sustained labor supply aligned with appliance manufacturing.

Demand is further accelerated by expanding electrification, increasing availability of consumer financing, and the rapid growth of e-commerce platforms, which are formalizing and scaling appliance distribution nationwide.

4. Local Manufacturing Advantage Versus Imports

Pakistan currently relies on imports to meet a significant share of its appliance demand, with import values of USD 560.56 Million, USD 356.73 Million, USD 494.25 Million in CY 2022, 2023 and 2024 respectively, in major categories of home appliances, over the past three years, details as given in the **Annexure-I.** This import dependence highlights a clear opportunity for local assembly and manufacturing.

Local production offers material advantages over Completely Built Unit (CBU) imports, including lower land costs, reduced freight exposure, shorter lead times, and improved working capital efficiency. Government policy explicitly favours localization through higher duties in CBUs and concessional treatment for raw materials and Semi-Knocked Down (SKD) kits, creating a clear economic incentive to manufacture locally.

5. Export Potential and Market Access

Pakistan's geographic position enables manufacturers to serve multiple regions from a single production base. Through CPEC, Pakistan provides direct connectivity between Western China and international markets.

Preferential market access under the Pak-China FTA, EU GSP+ status, and arrangements with ASEAN and GCC countries allows appliances manufactured in Pakistan to enter key markets at concessional or zero-duty rates.

Regional demand across the Middle East, Central Asia, and Africa continue to expand, with appliance demand growth rates of 8 %, 20 %, and 4 % respectively, reinforcing Pakistan's role as a regional export hub.

6. Competitive Advantages: Cost and Resources

Pakistan possesses domestic capacity in key appliance inputs including plastics, sheet metal, wiring harnesses, and packaging, produced in compliance with international quality and safety standards.

Industrial utility tariffs remain regionally competitive, with additional incentives available with Special Economic Zones. Labour costs for unskilled, semi-skilled, and skilled workers remain favourable, while Pakistan's growing base of engineers and technical graduates supports increasingly sophisticated manufacturing.

Government-led efforts to align technical and vocational training programs with sector requirements and the willingness of Pakistani enterprises to partner with Chinese counterparts to harness and deploy TVET resource in their joint venture spaces further strengthen long-term skilled labor availability.

7. Industrial Ecosystem and Logistics

Established appliance manufacturing clusters exist around Lahore and Gujranwala in Punjab, providing supplier networks, skilled labour, and ancillary services.

Pakistan's logistic infrastructure includes deep-sea ports at Karachi and Gawadar, an expanding network of dry ports, and integrated road and rail connectivity, enabling efficient inbound raw material movement and outbound export flows.

8. Government Facilitation and SEZ Framework

Pakistan offers structured facilitation environment for foreign investors through Special Economic Zones (SEZs) under CPEC. Priority zones such as Rachna Industrial Park (RIP) near Lahore city, Rashakai SEZ near Peshawar city, Allama Iqbal Industrial City and M3 Industrial City near Faisalabad city and Dhabijee, Korangi Creek and Bin Qasim near Karachi city and others provide tax holidays, duty-free import of plant and machinery, subsidized utilities, and one-window facilitation.

Investors benefit from streamlined, approvals through federal and provincial single-window mechanisms, defined timelines of regulatory clearances, and post-investment support including dispute resolution and after services.

9. Financing Ecosystem and Investment Models

Investors have access to long-term project financing from local banks and development finance institutions, contemplated by Chinese financial institutions including ICBC, Bank of China and the Silk Road Fund.

Investment structures may be configured as joint ventures, wholly-owned subsidiaries, or build-operate-transfer models, supported by land availability within SEZs and state-owned industrial land banks.

10. Proven Success Stories

Joint ventures and Chinese investments such as Hair Pakistan and Dawlance illustrate the scalability and sustainability of appliance manufacturing in Pakistan. These enterprises have progressed through multiple investment phases, increased localization, achieved market leadership and expanded into exports.

Beyond appliances, Chinese success stories in sectors such as telecommunications and energy further underscores long-term investor confidence in Pakistan's market.

11. <u>Pathway to Investment</u>

Establishing operations in Pakistan follows a clear pathway from company incorporation and land allocation to construction, approvals and commercial production.

The Pakistan–China B2B Investment Conference on Home Appliances offers a dedicated platform for Chinese and Pakistani investors to access live project pipelines, engage directly with other prior to and during the Conference and conduct on-ground site visits.

Investors are encouraged to engage with Pakistan in Embassy Beijing and Pakistan Consulates-General in China for further information.

Pakistan's Home Appliances Sector Snapshot

Reference: Pakistan-China B2B Home Appliances Investment Conference - 2026

I. Market Overview & Opportunity

a. Pakistan Home Appliances Market Size & Growth

Indicator	Value
Total Market Size (USD)	1.18 Billion
5-Year CAGR	~ 12 %
Household Penetration Rate	• Electric Fans: ~90–95% • Refrigerators: ~60–65% • Washing Machines: ~50–55% • Air Conditioners: ~30–35% • Water Dispensers: ~35–45% • Deep Freezers: ~20–25% • Microwave Ovens: ~25–30% • Televisions (LED/LCD): ~70–75% • Small Kitchen Appliances: ~45–55% • Vacuum/Cleaning Appliances: ~10–15%

b. Category-Wise Market Breakdown

Sr. #	Category	Market Size (USD Million)	CAGR (%)
1	Water Dispensers	331	9–12
2	Refrigerators	225	8–11
3	Deep Freezers	178	9–12
4	Microwave Ovens	166	9–12
5	Air Conditioners	95	8–12
6	Washing Machines	36	9–13
7	Televisions (LED/LCD)	24	6–9
8	Small Kitchen Appliances (mix: blenders, toasters, food processors etc.)	71	10–14
9	Home Care / Vacuum & Cleaning Appliances	24	9–13
10	Other Small Appliances (electric irons, personal/home utility small electric items etc.)	36	8–12

c. Demographic Tailwinds

Indicator	Metric
Population	251.27 Million
Median Age	20.8 Years
Urbanization Rate	2.7 %
Middle-Class Size	~35% of population *(Expanded middle class estimate)*
Average Household Disposable Income	PKR 82,179 Per Month (2024–25)

d. Demand Drivers

Driver	Current Status
Electrification Rate	95.6 %
Consumer Financing Penetration	8-12 %
E-Commerce Growth Rate	25-30 %

II. Local Production vs Imports

e. Import Bill of Home Appliances

Year	Import Value (USD Million)	Import Volume
CY 2022	560.56	• 11.45 Million Units • 5 Ton Parts
CY 2023	356.73	• 13.34 Million Units • 9 Ton Parts
CY 2024	494.25	• 46 Million Units • 5 Ton Parts

Moreover, the item-wise detail of import bill of Pakistan's Home Appliances Sector for CY 2024 is as given below.

Sr. #	HS Code	Product Description	Pakistan's Imports (2024) ($ Million)
1	8414.30	Compressors for refrigerating equipment	206.57
2	8414.51	Table, floor, wall, window, ceiling or roof fans, with a self-contained electric motor of an output <= 125 W	1.89
3	8415	Air conditioning machines comprising a motor-driven fan and elements for changing the temperature ...	106.04
4	8416	Furnace burners for liquid fuel, for pulverised solid fuel or for gas; mechanical stokers, ...	4.99
5	8418	Refrigerators, freezers and other refrigerating or freezing equipment, electric or other; heat	62.96
6	8450	Washing machines	13.39
7	8501.10	Motors of an output <= 37,5 W	15.97
8	8508.11	Vacuum cleaners, incl. dry cleaners and wet vacuum cleaners, with self-contained electric motor	0.66
9	8509	Electromechanical domestic appliances, with self-contained electric motor; parts thereof (excl.	5.88
10	8510.10	Electric shavers	1.85
11	8510.20	Hair clippers with self-contained electric motor	0.56
12	8510.30	Hair-removing appliances with self-contained electric motor	0.50
13	8510.90	Parts of electric shavers, hair clippers and hair-removing appliances, with self-contained ...	0.51
14	8516.10	Electric instantaneous or storage water heaters and immersion heaters	0.80
15	8516.31	Electric Hairdryers	1.11
16	8516.40	Electric iron	1.32
17	8516.50	Microwave ovens	0.34
18	8516.60	Electric ovens, cookers, cooking plates and boiling rings, electric grillers and roasters, for domestic use	5.55
19	8516.71	Electro-thermic coffee or tea makers, for domestic use	0.32
20	8516.72	Electric toasters, for domestic use	0.47
21	8516.79	Electro-thermic appliances, for domestic use (excl. hairdressing appliances and hand dryers, ...)	1.95
22	8528	Monitors and projectors, not incorporating television reception apparatus;	21.43
23	8534	Printed circuits	17.85
24	8544.42	Electric conductors for a voltage <= 1.000 V, insulated, fitted with connectors, n.e.s.	21.37
		Total	**494.25**

f. Cost Comparison (Localization vs. CBU Imports)

Cost Component	Local Manufacturing	CBU Imports
Freight	Low–Moderate (domestic trucking within Pakistan). Typical cost advantage due to proximity to consumer markets and clusters (Lahore–Gujranwala–Karachi).	High (international sea freight + inland transport). Depends on origin (China/Korea/Thailand) and port handling (Karachi).
Customs Duties	0–20% depending on parts and CKD/SKD classification. Components often enjoy lower duties to encourage localization.	Higher effective duty burden on finished goods. Typical applied rates: \n• Compressor: 0% \n• Refrigerator: 20% \n• Air Conditioner: 20% \n• Monitor/Projector: 0%
Lead Time	7–30 Days (local sourcing + assembly). Faster replenishment and production scheduling flexibility.	45–60 Days (shipping, customs clearance, inland delivery). Longer supply chain exposure.
Working Capital Lock	Low–Medium**:** Inventory cycles shorter, production aligned with domestic demand. Working capital tied up for ~1–2 months.	High**:** Capital blocked in transit + port clearance + bulk stocking. Working capital tied up for ~3–4 months.
Total Cost Index	100 (Baseline) \ Localization typically reduces landed cost by 15–25% over time due to tariff differential + logistics savings.	115–130 \ CBU imports remain more expensive due to freight, duties, FX risk, and longer cash cycle.

g. Government Policy Direction

Policy Instrument	Description
Regulatory Duties	In recent tariff policy reforms, the Government of Pakistan has used regulatory duties (RDs) as a tool to protect and incentivise domestic manufacturing, including in sectors such as home appliances. Under the Statutory Regulatory Duty framework, home appliances and similar electro-mechanical goods have been subject to RDs of around 10 % on imports to discourage finished imports and support local assembly/production capacity. These duties are part of the broader tariff rationalisation strategy where the Federal Board of Revenue (FBR) reviews and adjusts the RD rates on inputs and final goods to balance import control with domestic industry growth; at the same time the government has announced plans to rationalise tariffs over the medium-term while retaining RD lines to sustain local industry protection and revenue generation.
Additional Customs Duty	In recent trade policy, the Government of Pakistan has significantly recalibrated Additional Customs Duty (ACD) to support industrial competitiveness and reduce the cost of imported inputs, especially for manufacturing sectors including home appliances. As part of the National Tariff Policy 2025–2030, the Federal Board of Revenue (FBR) abolished ACD on imports falling under the lower duty slabs (0%, 5%, 10%) and reduced ACD and Regulatory Duty (RD) on many intermediate and capital goods, thereby lowering effective tariff barriers on raw materials and machinery needed for local manufacturing. These reforms aim to simplify the tariff structure, enhance predictability, reduce production costs for import-substitution industries, and encourage export-led growth, while still affording some protection to local producers through calibrated duty retention on finished goods.
Import Substitution Incentives	The Government of Pakistan has been progressively encouraging import-substitution manufacturing by rationalizing tariffs and extending duty and tax exemptions on the import of machinery, raw materials, and intermediate inputs

	for local production, including sectors such as home appliances, electrical goods and engineering products; this includes customs duty relief on plant and machinery and certain input goods to lower manufacturing costs and support domestic value addition, while export-oriented and SME manufacturing units benefit from preferential tax treatments and reduced regulatory duties under federal budgets and industrial policy frameworks, aimed at boosting local output, reducing import dependence and improving competitiveness of domestically manufactured products.

III. Export Potential & Market Access

h. Preferential Trade Access

Market	Trade Framework	Concessional Duty
China	Pak-China FTA	Preferential tariff access on a large number of industrial and engineering product lines, enabling Pakistani manufacturers to export selected electrical and appliance components at reduced or zero customs duty under agreed tariff concessions.
EU	GSP+	Pakistan enjoys duty-free access on ~66% of EU tariff lines, providing a major advantage for export-oriented manufacturing, including electrical goods and appliances, subject to compliance with EU technical and sustainability standards.
ASEAN	PTA/FTA	Pakistan benefits from limited preferential access through bilateral PTA arrangements and ongoing regional trade cooperation, offering select tariff reductions for engineering and consumer durable exports into ASEAN markets.
GCC	Preferential Access	Strong trade linkages with Saudi Arabia, UAE, Qatar and other GCC markets provide favourable market entry conditions, supported by low applied tariffs on many consumer durable categories and high demand for imported home appliances in Gulf markets.

i. Regional Demand Snapshot

Region	Home Appliances (Import Bill USD Billion)	Demand Growth (5 Years YoY Avg. Growth)
Middle East	22.12	8 %
Central Asia	2.50	20 %
Africa	9.39	4 %

IV. Cost & Resource Analysis

j. Raw Material Availability

Input	Local Capacity	Compliance Standards
Input – 1 **Flat steel (CRC/galvanized sheets)** for bodies/cabinets (fridges, washers, deep freezers)	High	ASTM A1008 / EN 10130 (cold rolled steel), ISO 9001 QA, RoHS coating compliance
Input - 2 **Float glass** (refrigerator shelves/doors, some appliance glazing)	High	EN 572 (float glass), ISO 12543 (safety glass), IEC appliance glazing requirements
Input - 3 **PVC resin** (wire insulation, profiles, some parts)	High	ASTM D1784 (PVC compounds), REACH compliance, RoHS material restrictions
Input - 4 **Other polymers (PP/ABS/HIPS/PC, engineering plastics)** used for housings, trims, interior liners	Medium	ISO 1873 (PP), ISO 2580 (ABS), UL 94 flammability standard

Input – 5 **Copper (tubing/winding)** for refrigeration tubing, motors	Medium	ASTM B280 (copper tubing), IEC 60317 (winding wire), ISO 9001 metallurgy
Input – 6 **Aluminium (sheets/extrusions)** for fins, heat exchangers, frames	Medium	ASTM B209 (aluminum sheet), EN 573 alloys, ISO 14001 (eco compliance)
Input – 7 **Compressors (hermetic)** for refrigerators/AC	Low	IEC 60335-2-34 (compressor safety), ISO 5149 refrigerant systems, CE compliance
Input – 8 **Motors** (fans, blowers, washer motors)	Medium	IEC 60034 (motor performance), IE2/IE3 efficiency standards, ISO 9001 QA
Input – 9 **Electronics:** PCBs, controllers, sensors, inverters, displays	Low	IEC 60730 (controls safety), EMC Directive, RoHS, CE marking requirements
Input – 10 **Refrigerants & chemicals** (coolants, foaming chemicals/PU systems)	Medium	Montreal Protocol compliance, ISO 817 refrigerant classification, ASHRAE standards
Input – 11 **Insulation** (PU foam, insulation materials)	Medium	ISO 9001 chemical QA, ASTM D2856 (foam properties), fire safety compliance
Input – 12 **Rubber parts, gaskets, seals**	Medium	ISO 1629 rubber classification, ASTM D2000 elastomer specs
Input – 13 **Fasteners, fittings, sheet metal parts**	High	ISO 898 (fasteners), DIN standards, appliance mechanical tolerances
Input – 14 **Packaging** (cartons, printed boxes, EPS)	High	ISO 186 (packaging recycling), FSC certification, export packaging compliance

k. Utility Costs

Utility	Industrial Tariff	SEZ Tariff
Electricity	$ 0.08 Per Unit	$ 0.08 Per Unit
Gas	$ 8.42 Per MMBTU	$ 8.42 Per MMBTU
Water	As applicable on case to case basis	As applicable on case to case basis

l. Labor Cost Structure

Category	Average Monthly Cost Per Worker ($)
Unskilled	143
Semi-Skilled	160 ~ 200
Skilled	214 ~ 286
Engineers / Technicians	357 +

V. Fiscal & Tariff Incentives

m. Tax Regime Overview

Tax Type	Rate
Corporate Income Tax	29 %
Withholding Taxes	15 ~ 20 %
Provincial Sales Tax (Services)	16 %
Others	As may be applicable on case to case basis.

n. Tariff Differential (Incentive Signal)

Category	Duty Rate
Raw Materials	0 % - 35 %
SKD Kits	0 % - 35 %
CBUs	0 % - 35 %

VI. SEZs & Facilitation

o. Priority SEZs for Home Appliances

SEZ	Province	Readiness Status	Suitability
Allama Iqbal Industrial City	Punjab	High	High
M3 Industrial City	Punjab	High	High
Rachna Industrial Park (RIP)	Punjab	High	High
Rashakai SEZ	Khyber Pakhtunkhwa	High	Medium
Dhabeji	Sindh	Low	Medium
Korangi Creek	Sindh	High	High
Bin Qasim	Sindh	High	High
Others			

p. Approval Timelines

Authority	Estimated Timeline
SECP	3-14 Working Days
EPA	45-90 Days
Electricity	30 – 60 Days
Gas	90 Days
Water	15-20 Working Days

VII. Investment Projects

q. Potentially Investable Projects

Project	Location	Investment Size (USD Million)	Structure (JV or otherwise)	IRR
Project A: Compressor & Motor Manufacturing Plant (Highest Priority)	Lahore–Sheikhupura / Faisalabad Industrial Belt (Punjab) / Rachna Industrial Park / Allama Iqbal Industrial City SEZ	80–120	Pakistan–China Joint Venture (Technology Transfer + Localization)	18–22%
Project B: Inverter AC PCB & Smart Control Module Facility	Karachi–Hub Industrial Corridor / Dhabeji SEZ	35–60	Chinese Strategic Investment + Local Vendor Partnership	20–25%
Project C: Refrigerator & Deep Freezer Assembly + Export-Oriented Plant	Faisalabad / M3 Industrial City SEZ	50–90	JV Assembly Model (CKD → Full Localization in 3-5 Years)	16–20%
Project D: HVAC Copper Tubing + Heat Exchanger Manufacturing Unit	Gujranwala–Wazirabad Cluster (Punjab)	25–45	Private Investment + Chinese Equipment Supplier Partnership	17–21%
Project E: Small Appliances & Fan Export Cluster Development (OEM Base)	Gujrat–Gujranwala SME Manufacturing Cluster	15–30	SME Consortium + Chinese OEM Buyer-Led Investment	22–28%

r. Land Availability

Location	Plot Size (Acres)	Lease/purchase rates	Utilities
SEZ	0.5 Acre to 100 Acre depending on location	Rs. 15 Million to 80 Million Per Acre depending upon location.	Available in SEZs mentioned at Sr. # o above.
Non-SEZ	Depends on location	Depends on location	Available

VIII. Financing Ecosystem

s. Financing Sources

Source	Instrument	Terms
Local Banks/DFIs	Project Finance	Kibor + 3-5 % (14-16 %)
Chinese Banks	Long-Term Debt	3.5 %
State Programs	Credit Guarantee	5 %

巴基斯坦家电行业
投资推介手册

1. 为什么选择投资巴基斯坦

中国正利用部署新质生产力的前沿来升级其经济，包括家电制造商在内的中国传统产业也在寻求结合成本效益、政策确定性和长期市场深度的解决方案。在这一转型上，巴基斯坦脱颖而出，成为一个可行的合作伙伴。

以全天候战略合作伙伴关系和中巴经济走廊为依托，巴基斯坦提供了一个便捷的平台，对接高速增长消费市场的工业链，以及面向多地区的出口市场。巴基斯坦凭借不断增长的国内需求、有竞争力的生产成本以及政府对产业本地化的明确承诺，即是可选择的生产基地，也是可靠的增长伙伴。

巴基斯坦人口规模、地理优势和政策协同性的结合，对当前中国企业进入而言，提供了一个独特的、引人注目的窗口期。

2. 巴基斯坦投资亮点

巴基斯坦的家电行业具有强大的投资价值，有以下五大核心驱动因素。

第一，巴基斯坦国内市场在城市化、电气化和不断壮大的中产阶级推动下飞速扩张。

第二，巴基斯坦提供有利的劳动力成本、本地化的原材料供应以及具有竞争力的公用事业费率，尤其是在经济特区内，为制造业提供了有竞争力的环境。

第三，巴基斯坦的地理位置及其通过中巴自贸协定、与海湾合作委员会成员国的自贸协定以及与欧盟的普惠制+机制，享有区域和全球市场准入的优惠待遇。

第四，政府现在针对进口的关税保护、鼓励本地化的财政激励措施，以及为外国投资者提供的快速通道便利机制等的大力支持。

第五，中巴经济走廊带来的互联互通将巴基斯坦定位为一个连接中国与中东、非洲和中亚的生产和出口走廊。

3. 市场概览与机遇

目前，巴基斯坦家电市场规模约为 11.8 亿美元，并预计将稳步增长。冰箱、空调、洗衣机和小家电的需求显著，反映出家庭持有率的上升和购买力的提高。

人口基本面提供了持久的需求动力。巴基斯坦拥有 2.5127 亿人口，中位年龄 20.8 岁，城镇化率 2.7%，这既创造了庞大的消费群体，也为家电制造业提供了持续的劳动力供应。

电气化、消费金融的普及以及电子商务平台的快速增长进一步加速了需求，电子商务正在使家电分销在全国范围内规范化和规模化。

4. 本地制造优势对比进口

目前，巴基斯坦依靠进口来满足其大部分家电需求。过去三年，2022 年、2023 年、2024 年主要家电类别的进口额分别为 5.6056 亿美元、的 3.5673 亿美元和 4.9425 亿美元，详见**附件一**。这种进口依赖凸显了本地组装和制造的显著机遇。

与进口全组装产品相比，本地生产具有实质性优势，土地成本更低、运费支出减少、交货时间更短的以及营运资金效率提提升。政府政策通过对全组装产品征收更高进口关税和对原材料及半散装件给予优惠待遇，明确支持本地化，为本地制造创造了清晰的经济激励。

5. 出口潜力和市场准入优势

巴基斯坦的地理位置能为制造商提供链接多个地区的成产基地。通过中巴经济走廊，巴基斯坦直接连通中国西部与国际市场。

巴基斯坦享有中巴自贸协定、欧盟普惠制+待遇以及与东盟和海湾合作委员会国家的协定的优惠市场准入，其家电产品得以优惠或零关税税率进入关键市场。

中东、中亚和非洲的区域需求持续扩大，家电需求增长率分别为 8%、20% 和 4%，这进一步巩固了巴基斯坦作为区域出口枢纽的地位。

6. 竞争优势：成本与资源

巴基斯坦拥有关键家电产品本地生产能力，包括塑料、金属板材、线束和包装，这些产品符合国际质量和安全生产标准。

工业公用事业费率在区域内保持竞争力，经济特区内还提供额外激励措施。有利的非熟练、半熟练和熟练工人的劳动力成本，和巴基斯坦不断增长的工程师和技术毕业生基础支撑着日益复杂的制造业。

政府努力促进技术和职业培训计划与行业需求接轨，以及巴基斯坦与中国合资伙伴意愿利用技术和职业培训资源，进一步加强了长期熟练劳动力的可用性。

7. 产业生态系统与物流

在旁遮普省的拉合尔和古杰兰瓦拉周围已经建立了成熟的家电制造集群，提供供应商网络、熟练劳动力和配套服务。

巴基斯坦的物流基础设施包括卡拉奇和瓜达尔的深水港、不断扩展的陆港网络以及一体化的公路和铁路连接，能够实现高效的入境原材料运输和出境出口货流。

8. 政府便利化措施与经济特区框架

巴基斯坦为中巴经济走廊下的经济特区的外国投资者提供结构化的便利化环境。拉合尔附近的拉奇纳工业园、白沙瓦附近的拉沙卡伊经济特区、费萨拉巴德附近的阿拉马·伊克巴尔工业城和 M3 工业城以及卡拉奇附近的 Dhabijee、Korangi Creek 和宾卡西姆工业园区等重点区域提供免税期、工厂和器械免税进口、补贴公用事业费和一站式便利化服务。

投资者受益于联邦和省级一站式精简的审批流程、明确的监管许可时间表，以及包括争端解决和售后服务在内的投资后支持。

9. 融资生态系统与投资模式

投资者可以获得当地银行和发展金融机构的长期项目融资，以及包括中国工商银行、中国银行和丝路基金等中国金融机构。

投资结构可配置为合资企业、独资子公司或建设-经营-转让 BOT 模式，并享有经济特区内土地使用权和国有工业用地银行的支持。

10. 成功案例

海尔巴基斯坦和 Dawlance 等合资企业和中国直接投资展示了巴基斯坦进行家电制造的可扩展性和可持续性。这些企业经历了多个投资阶段，提高了本地化程度，逐步取得市场领导地位，并扩展到出口领域。

在家电之外，电信和能源等行业的中国成功案例进一步凸显外国投资者对巴基斯坦市场的长期信心。

11. 投资路径

在巴基斯坦建立业务有清晰可循的路径，从公司注册、土地分配，到建设、审批、最终商业生产。

巴中家电企业 B2B 投资大会为此提供了一个专属平台，为中巴投资者提供实时项目渠道，方便会前后直接交流，并进行实地考察。

欢迎投资者与巴基斯坦驻华大使馆和巴基斯坦驻中国总领事馆联系以获取更多信息。

巴基斯坦家电行业概览

参考：2026 年巴中家电企业 B2B 投资大会

一、 市场概览与机遇

1. 巴基斯坦家电市场规模与增长

指标	数值
市场规模总额（美元）	11.8 亿
五年复合年增长率	约 12 %
家庭渗透率	• 电风扇：约 90–95% • 冰箱：约 60–65% • 洗衣机：约 50–55% • 空调：约 30–35% • 饮水机：约 35–45% • 冷柜：约 20–25% • 微波炉：约 25–30% • 电视机（发光二极管 LED /液晶显示器 LCD）：约 70–75% • 厨房小家电：约 45–55% • 吸尘器/清洁电器：约 10–15%

2. 按品类划分的市场细分

序列	**品类**	**市场规模 (百万美元)**	**年增长率 (%)**
1	饮水机	331	**9–12**
2	冰箱	225	**8–11**
3	冷柜	178	9–12
4	微波炉	166	9–12
5	空调	95	8–12
6	洗衣机	36	**9–13**
7	电视机 （发光二极管 LED /液晶显示器 LCD）	24	6–9
8	厨房小家电(包括 搅拌机, 烤面包机, 食品加工机等。)	71	10–14
9	家庭护理/吸尘及清洁设备	24	9–13
10	其他小型电器（电熨斗、个人/家庭小型电器等）	36	8–12

3. 人口结构利好因素

参数	**数值**
人口	2.5127 亿
中位年龄	20.8 岁

城镇率	2.7 %
中产阶级规模	约 35% 的人口 （估计扩大的中产阶级）
平均家庭可支配收入	每月 82,179 巴基斯坦卢比 (2024–25)

4. 需求驱动因素

驱动因素	现状
电气化率	95.6 %
消费金融渗透率	8-12 %
电商增速	25-30 %

二、本地生产对比进口

5. 家电进口额

年份	进口额 (百万美元)	进口量
CY 2022	560.56	• 1145 万台 • 5 吨零部件
CY 2023	356.73	• 1334 万台 • 9 吨零部件
CY 2024	494.25	• 4600 万台 • 5 吨零部件

此外，2024 日历年巴基斯坦家电行业按品类划分的进口额明细如下。

序号	HS 编码	产品描述	2024 年巴基斯坦进口额 (百万美元)
1	8414.30	制冷设备用压缩机	206.57
2	8414.51	台扇、落地扇、壁扇、窗扇、吊扇或天花板扇，自身装有输出功率 ≤ 125 瓦的电动机	1.89
3	8415	内置电动机驱动风扇和用于改变温度元件的空调设备	106.04
4	8416	使用液体燃料、粉状固体燃料或气体的炉用燃烧器；机械加煤机等	4.99
5	8418	电气或非电气的冰箱、冷柜及其他制冷或冷冻设备；热泵等	62.96
6	8450	洗衣机	13.39
7	8501.10	输出功率 ≤ 37.5 瓦的电动机	15.97
8	8508.11	内置电动机的真空吸尘器，包括干式和湿式真空吸尘器等	0.66
9	8509	内置电动机的家用机电器具及其零件	5.88

10	8510.10	电动剃须刀	1.85
11	8510.20	内置电动机的毛发推剪器	0.56
12	8510.30	内置电动机的脱毛器	0.50
13	8510.90	电动剃须刀、毛发推剪和脱毛器的零件	0.51
14	8516.10	电热的快速热水器、储存式热水器、浸入式加热器	0.80
15	8516.31	电吹风机	1.11
16	8516.40	电熨斗	1.32
17	8516.50	微波炉	0.34
18	8516.60	家用电炉、灶具、烤盘和煮环、电烤架和电烤炉	5.55
19	8516.71	家用电热咖啡机或茶壶	0.32
20	8516.72	家用电烤面包机	0.47
21	8516.79	家用电热器具（不包括美发器具和干手器等)	1.95
22	8528	显示器和投影机，未装有电视接收装置；	21.43
23	8534	印刷电路	17.85
24	8544.42	用于电压 ≤ 1000 伏的装有连接器的绝缘电导体，未另列名	21.37
		总计	**494.25**

6. 成本比较（本地化对比全组装产品进口）

成本组成	**本地生产**	**全组装产品进口**
物流	**低至中等（巴基斯坦国内卡车运输）。由于靠近消费市场及产业聚集区（如拉合尔-古吉兰瓦拉-卡拉奇走廊），具有典型的成本优势。**	**高（国际海运 + 内陆运输）。成本取决于原产地（中国/韩国/泰国）以及港口处理效率（卡拉奇）。**
关税	**0–20%** 具体取决于零部件品类及 CKD/SKD（全散件/半散件）的分类。零部件通常享受较低关税以鼓励本土化生产。	**制成品实际有效关税负担较高。典型适用税率如下：** **• 压缩机：0%** **• 冰箱：20%** **• 空调：20%** **• 显示器/投影仪：0%**
交货时间	**7–30 天（本地采购 + 组装）。补货速度更快，生产排期灵活性更高。**	**45–60 天（航运、清关、内陆运输）。供应链周期较长，风险敞口更大。**

运营资金占用	**低至中等。库存周转周期较短，生产与国内需求同步。营运资金占用约 1–2 个月。**	**高。资金积压在途库存、港口清关及批量仓储环节。营运资金占用约 3–4 个月。**
总成本指数	**100（基线值）**\随着时间的推移，由于关税差额与物流成本的节省，本土化通常能使落地成本降低 15–25%。	**115–130**\由于运费、关税、外汇风险以及更长的现金周期，CBU（完全组装成品）进口仍然比本土生产更昂贵。

7. 政府政策导向

政策	简介
监管关税(RD)	在最近的关税政策改革中，巴基斯坦政府使用监管关税作为保护和激励国内制造业的工具，包括家电等行业。根据法定监管关税框架，家电及类似机电产品进口已被征收约 10% 的监管关税，以抑制成品进口并支持本地组装/生产能力。这些关税是更广泛关税合理化战略的一部分，联邦税务局审查和调整投入品和成品的监管关税税率，以平衡进口管控与国内产业增长；同时，政府已宣布计划在中期内合理化关税，同时保留监管关税项目以维持对本地产业的保护和财政收入。
附加关税(ACD)	在最近的贸易政策中，巴基斯坦政府对附加关税（ACD）进行了重大调整，以提升工业竞争力并降低进口投入品的成本，特别是针对包括家用电器在内的制造业部门。作为《2025-2030 年国家关税政策》的一部分，联邦税收委员会（FBR）废除了对适用低关税税率（0%、5%、10%）的进口商品征收的附加关税，并降低了许多中间产品和资本货物的附加关税和监管税，以此降低本地制造业所需的原材料和机械的实际关税壁垒。这些改革旨在简化关税结构，增强可预见性，降低进口替代型产业的生产成本，并鼓励出口导向型增长，同时通过对成品实施有节制的关税保留，为本地生产商提供一定的保护。
进口替代激励	巴基斯坦政府一直通过合理化关税，调整对本地生产所需的机械、原材料和中间投入品（包括家用电器、电气产品和工程产品等行业）进口的关税和税收豁免，来逐步鼓励进口替代型制造业发展。包括对工厂、机械及某些投入品关税减免，以降低制造成本并支持国内附加值提升。同时，在联邦预算和产业政策框架下，出口导向型和中小型制造企业享有优惠税收待遇和更低的监管税。这些举措旨在提高本土产量，减少对进口的依赖，并提升本土制造产品的竞争力。

三、出口潜力与市场准入

8. 优惠贸易准入

市场	贸易框架	优惠关税
中国	中巴自贸协定	在众多工业和工程产品线上享有优惠关税准入，使巴基斯坦制造商能够根据商定的关税减让，以降低或零关税出口精选的电气和电器零部件。
欧盟	普惠制计划	巴基斯坦对约 66%的欧盟关税细目享有免关税准入，这为包括电气产品和家用电器在内的出口导向型制造业提供了重大优势，但需符合欧盟的技术与可持续性标准。

东盟	特惠贸易协定/自由贸易协定	通过双边优惠贸易协定（PTA）安排和持续的区域贸易合作，巴基斯坦享有有限的优惠准入，为面向东盟市场的工程产品和耐用消费品出口提供特定关税减让。
海湾国家	优惠准入	与沙特阿拉伯、阿联酋、卡塔尔及其他海湾合作委员会（GCC）市场拥有牢固的贸易联系，提供了有利的市场准入条件。海湾市场对许多耐用消费品类别适用低关税，且对进口家用电器的需求旺盛。

9. 区域需求概览

地区	家电 (进口额 10 亿美元)	需求曾率 (5 年平均年增长率)
中东	22.12	8 %
中亚	2.50	20 %
非洲	9.39	4 %

四、成本与资源分析

10. 原材料的获取

投入品	本地产能	合规标准
投入品 – 1 用于（冰箱、洗衣机、冷柜）机身/机柜的**扁平钢材（冷轧板/镀锌板）**	高	符合 ASTM A1008 / EN 10130 标准（冷轧钢板），ISO 9001 质量保证，符合 RoHS 关于涂层的规定
投入品 - 2 用于冰箱搁架/门体、部分家电玻璃配件的**浮法玻璃**	高	符合 EN 572 标准（浮法玻璃），ISO 12543 标准（安全玻璃），满足 IEC 关于家电玻璃的要求
投入品 - 3 **聚氯乙烯树脂**（用于电线绝缘、型材、部分零部件）	高	符合 ASTM D1784 标准（聚氯乙烯材料），符合 REACH 法规，满足 RoHS 关于材料的限制
投入品 - 4 用于外壳、装饰件、内胆的**其他聚合物（聚丙烯 PP/丙烯腈-丁二烯-苯乙烯共聚物 ABS/高抗冲聚苯乙烯 HIPS/聚碳酸酯 PC、工程塑料）**	中等	符合 ISO 1873 标准（聚丙烯），ISO 2580 标准（ABS 树脂），UL 94 阻燃等级标准
投入品 – 5 用于制冷管路、电机的**铜材（管材/绕组线）**	中等	符合 ASTM B280 标准（铜管），IEC 60317 标准（绕组线），ISO 9001 冶金质量保证
投入品 – 6 用于翅片、热交换器、框架的**铝材（板材/挤压型材）**	中等	符合 ASTM B209 标准（铝板），EN 573 合金标准，ISO 14001 环保合规

投入品 – 7 用于冰箱/空调的**（全封闭）压缩机**	低	符合 IEC 60335-2-34 标准（压缩机安全性），ISO 5149 制冷系统标准，CE 认证
投入品 – 8 **电机**（风扇、鼓风机、洗衣机电机）	中等	符合 IEC 60034 标准（电机性能），IE2/IE3 能效等级标准，ISO 9001 质量保证
投入品 – 9 **电子元件：**印刷电路板、控制器、传感器、变频器、显示屏	低	符合 IEC 60730 标准（控制器安全），电磁兼容指令，RoHS 标准，CE 标志要求
投入品 – 10 制冷剂与化学品（冷却液、发泡化学品/聚氨酯组合料）	中等	符合蒙特利尔议定书，ISO 817 制冷剂分类标准，ASHRAE 标准
投入品 – 11 **保温材料**（聚氨酯泡沫、隔热材料）	中等	符合 ISO 9001 化学品质量保证，ASTM D2856 泡沫材料性能标准，消防安全要求
投入品 – 12 **橡胶件、垫圈、密封条**	中等	符合 ISO 1629 橡胶分类标准，ASTM D2000 弹性体规范
投入品 – 13 **紧固件、配件、钣金件**	高	符合 ISO 898 紧固件标准，DIN 标准，满足家电机械公差要求
投入品 – 14 包装材料（纸箱、印刷彩盒、可发性聚苯乙烯）	高	符合 ISO 186 包装回收标准，FSC 认证，满足出口包装要求

11. 公用事业成本

公用事业	工业收费标准	自贸区收费标准
电	0.08 美元/度	0.08 美元/度
燃气	8.42 美元/百万英热单位	8.42 美元/百万英热单位
水	视具体情况而定	视具体情况而定

12. 劳动力成本结构

类别	单位劳动力月平均成本 (美元)
非熟练	143
半熟练	160 ~ 200
熟练	214 ~ 286
工程师/技术员	357 +

五、财税激励

13. 税收制度

税类	税率
公司所得税	29 %
预扣所得税	15 ~ 20 %
省销售税(服务业)	16 %
其他	视具体情况而定

14. 关税差异 (激励信号)

税类	税率
原材料	0 % - 35 %
半散装件	0 % - 35 %
全组装产品	0 % - 35 %

六、经济特区与便利化措施

15. 家电行业重点经济特区

经济特区	省	就绪状态	可持续性
阿拉马·伊克巴尔工业城	旁遮普	高	高
M3 工业城	旁遮普	高	高
拉奇纳工业城 (RIP)	旁遮普	高	高
拉沙卡伊经济特区	开伯尔-普什图省	高	中等
Dhabeji	信德省	低	中等
Korangi Creek	信德省	高	高
宾卡西姆	信德省	高	高
其他			

16. 审批时间表

主管部门	预计时间
证券交易委员会	3-14 工作日
环境保护局	45-90 日
电	30 – 60 日
天然气	90 日
水	15-20 工作日

七、投资项目

17. 潜在可投资项目

项目	地点	投资规模 (百万美元)	模式 (合资或其他)	内部收益率
项目 A: 压缩机与电机制造工厂（最高优先级）	拉合尔 – 谢胡布尔 / 费萨拉巴德工业带 (旁遮普省) / 拉奇纳工业园 / 阿拉马 • 伊克巴尔工业城经济特区	80–120	中巴合资企业（技术转让 + 本土化生产）	18–22%
项目 B: 变频空调印刷电路板及智能控制模块生产设施	卡拉奇 – 胡布工业走廊 / 达贝吉经济特区	35–60	中国战略投资 + 本地供应商合作	20–25%
项目 C: 冰箱与冷柜组装 + 出口导向型工厂	费萨拉巴德 / M3 工业城经济特区	50–90	合资组装模式（全散件组装 → 3-5 年内实现完全本土化）	16–20%
项目 D: 暖通空调系统铜管 + 热交换器制造厂	古吉兰瓦拉 – 瓦兹拉巴德产业集群 (旁遮普省)	25–45	个人投资 + 中国设备供应商合作	17–21%
项目 E: 小型家电与风扇出口产业集群开发（OEM 基地）	**古吉拉特 – 古吉兰瓦拉中小制造企业集群**	15–30	中小企业联合体 + 中国原始设备制造商采购引导型投资	22–28%

18. 土地供应情况

地点	地块面积(英亩)	租赁/购买价格	公用设施
经济特区	0.5-100 英亩视地点而定	Rs. 1500 万-8000 万卢比/英亩视地点而定	上述提及的经济特区可用
非经济特区	视地点而定	视地点而定	可用

八、融资生态系统

19. 融资来源

来源	工具	条款
本地银行/开发金融机构	项目融资	卡拉奇银行间同业拆放利率+ 3-5 % (14-16 %)
中资银行	长期债务	3.5 %
国家计划	信贷担保	5 %