

A REVIEW OF THE FURNITURE DESIGN INDUSTRY IN PAKISTAN: CHALLENGES AND OPPORTUNITIES

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ABSTRACT

This research paper is focused on the topic of Pakistan's exclusive furniture industry renowned in the world for its unique and fine carving style which dates back to pre-Mughal era and has evolved over time. The aim of this paper is to research the challenges and opportunities with regards to the current state of furniture design in Pakistan. The paper first outlines the current status of the furniture industry in Pakistan, emphasizing on how fragmented and dominant the small scale manufacturing units are. It will then examine the foremost regions in Pakistan, famous for furniture making as well the export potential of this industry. This research will look into the various obstacles that are faced by this industry that limits its potential such as the lack of modern technology, skilled and qualified labor, quality control as well as access to market. Limited scholarly literature regarding the furniture making regions, especially in the Sindh and Balochistan provinces, is also highlighted as a gap in research in development (Li & Wen, 2021). The paper goes on to delve into the sustainability aspect of the industry, looking at the life cycle assessment study done in Khyber Pakhtunkhwa province. The research underlines the need for greener production processes and industry-wide sustainability policies. Finally, the paper provides recommendations that can improve the potential of the furniture making industry. These will consist of addressing the issues of resource and infrastructure, the shift of traditional practice methods to more sustainable methods, investing in modern technology and trained labor as well as encouraging the research and development in furniture design, especially the lesser explored areas of Pakistan. By looking into all these issues and aspects, this paper aims to create better understanding of Pakistan's furniture industry and thereby create a road map for increasing its competitiveness and growth potential in the global market.

Keywords: Furniture Design, Industry Analysis, Challenges, Opportunities, Market Trends, Export Potential, Local Manufacturing, Artisanal Craftsmanship, Design Innovation, Economic Impact, Sustainability.

1. INTRODUCTION

Pakistan's furniture industry is highly fragmented, with majority of manufacturing units being small-scale. The problems that the industry faces include absence of modern technology, expertise workers, quality control and markets access. However, the country has always been known for its innovation and craftsmanship but when compared to global markets it does not have any significance in terms

of international wooden furniture market size (Li & Wen, 2021)(Khaskhely et al., 2021).

The furniture manufacturing in Pakistan is highly fragmented, comprising mostly of small-scale units (Khan, 2019). This sector is faced by a number of problems, some of which include obsolete technology and the minimal skilled laborers to employ, lack of commitment on quality checks for

standardization and market issues (Ahmed et al., 2020). Historically rich craftsmanship, innovation, tradition and associated culture in Pakistan are limitedly small as compared to the huge wooden furniture market size at global level (Malik 2018). This disparity highlights the need for a comprehensive inquiry into the reasons slowing down or preventing the growth and global competitiveness of the industry. An examination of Pakistan's own furniture design sector can offer guidance that can be enlightening - through the understanding of the challenges faced by our own industry, and the means to circumnavigate those challenges to unlock the dormant potential in an industry with a lot to offer.

Pakistan furniture industry depicts a major level of fragmentation, with the majority of small-scale units (Khan, 2019). This sector faces challenges including lack of advanced technology, cost and non-availability skilled labor, quality control and limited market access (Ahmed et al., 2020). Although Pakistan has skilled labor in its country, and it also has a history of innovation, the global market share of wooden furniture is only 0.76% as compared to the overall industry size (Malik, 2018). This suggests that it is important to understand why manufacturing lags so far behind - and what we can do to explore the reasons for its weaknesses in developing globally competitive industries. In this context, we can learn from conducting a thorough analysis of the furniture design sector in Pakistan - and by doing so raise holistic insights into how these challenges can be bridged or overcome.

2. Literature Review:

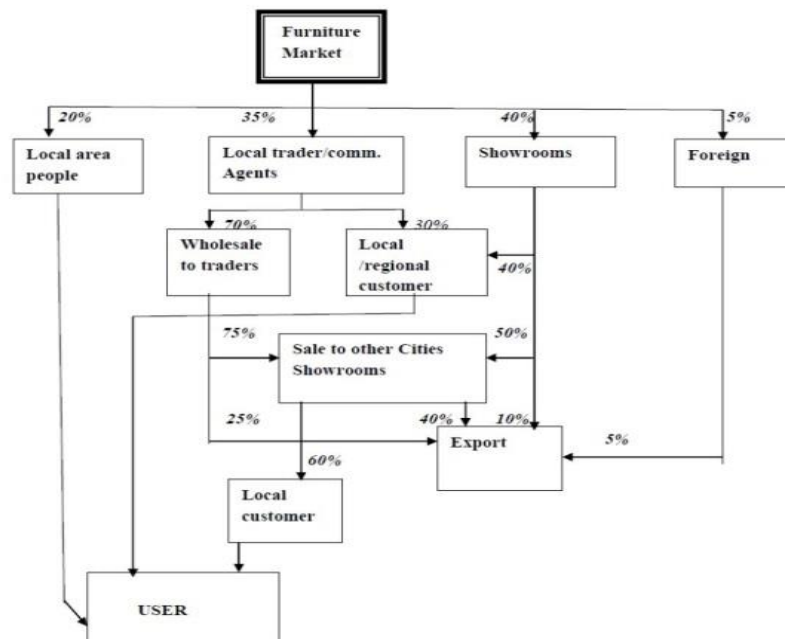
The literature review for this research paper, clearly indicate the major shortcomings in Pakistan's furniture design industry. Indeed, a study conducted by Muhammad Suandi et al in "A Review on Sustainability Characteristics Development for Wooden Furniture Design" contributes to the focus on green consumerism and sustainability values on wooden furniture, an

important drive for sustainable furniture design and manufacturing in Pakistan (Muhammad Suandi et al., 2022). The case study based on wooden furniture in District Chiniot, Punjab Pakistan, by Ahmad Nawaz shows the essentials and growth potential of furniture marketing channels in the value chain analysis (Nawaz, 2017).

Some of the issues that are highlighted in the 'PACRA research on Pakistan furniture industry' include: the problem of availability of raw material where the country lacks adequate forest cover to produce local timber and this greatly affected furniture makers; the high and growing competition from tainted players; and low level of automation that translates to inefficiency. But at the same time it reveals some threats like the negative impact of urbanization, contraction of the middle class, which in the long run will require furniture. They postulate that there exist regulatory frameworks for local manufacturers whilst the big outlets and brands are known to have high credibility for producing good quality products (Tauseef & Raza, 2021).

This is because the furniture industry all over the world is predicted to have an average annual growth rate of about 5% to 6% by the end of the year 2027 through end user sectors like construction and the gradual rise in disposable income among the consumers. Furniture industry in Pakistan has suffered from COVID-19 but officials believe it will bounce back soon through business and offices. The wood furniture is the biggest segment and possesses the market share of almost 60%.

This paper therefore calls for functional and effective furniture design principles in Pakistan as advocated by green products and sustainability values. The study also provides some limitations of the furniture industry in Pakistan as there are no resources available in Pakistan and low automation is another factor and highlights the future prospects as the urbanization and growth of middle class continuously increasing (Tauseef et al., 2023).



3. Research Methodology:

The research methodology approach adopted for this research is a descriptive research that seeks to examine the furniture design industry in Pakistan and identify its strengths and weaknesses. This includes a critical review of the literature and a synthesis of current data to present an industry overview and outlook.

The data used in the analysis comes from a review of literature in the area of academic journals, research papers, and industry reports on the current state and trends in the industry, consumers and regulatory environment. This paper will employ both primary and secondary sources as means of data collection where primary data shall be obtained from interviews with key players involved in the manufacture of the furniture, designers, and other experts in the field. Secondary data which include government statistics, data from specialized associations, and existing market research data will be collected.

This data collected will be analyzed them by content and statistical analyzes, and to determine patterns, trends, and correlation. It will then be concluded in a language and format that is easily understandable in order to show the threats and opportunities that are within the industry. The sampling is also going to involve purposive sampling to assist in the identification of the most

suitable persons for the study. This will therefore need to ensure that measures such as data validation and verification will be implemented in order to ensure the quality of the data that will be used is high. It will be ethical to address issues of the participant's consent and right to anonymity as well as protection of data and information.

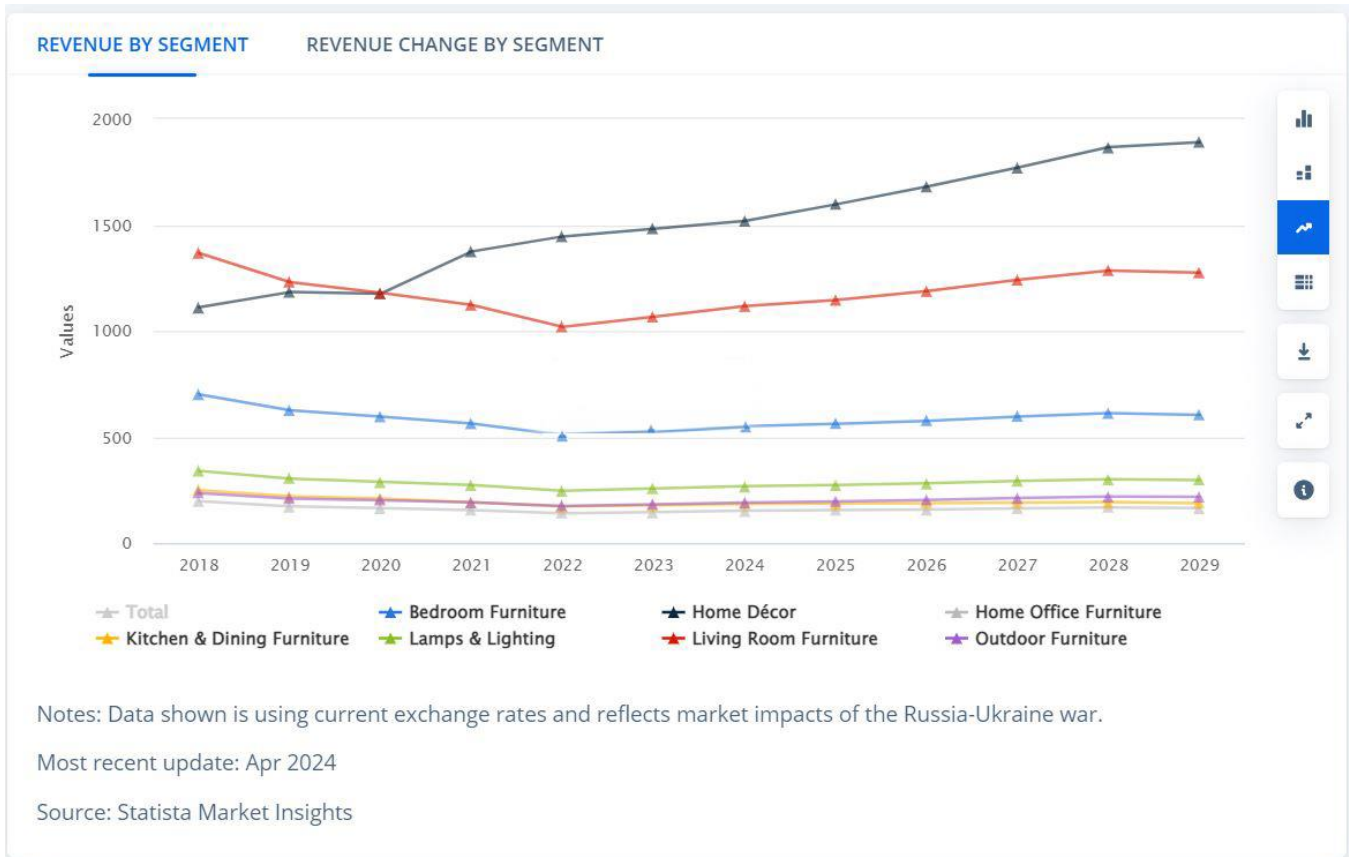
This research design outline sets out the normative process that should be pursued to facilitate a satisfactory assessment of furniture design industry in Pakistan with special focus on threats and opportunities. The goal of this paper is to provide detailed data on the current conditions of the industry and possible ways of its development, as well as the main challenges and opportunities the industry has to address.

4. Current State of Furniture Design in Pakistan:

The furniture industry in Pakistan has a diverse structure, comprising both small and medium-sized enterprises (SMEs) and a significant cottage industry. This mix leads to intense competition within the market. By the end of 2022, the industry is projected to generate revenue of approximately \$800 million. Household furniture accounts for around 60% of the market, while office furniture

makes up the remaining 40% (Siddiqui, n.d.) (Tauseef & Raza, 2021). Despite its size, the industry has faced challenges. Exports have declined in recent years, dropping from \$5.46 million in FY16 to \$3.53 million in FY20 (Siddiqui, n.d.) (Tauseef & Raza, 2021). Factors contributing to this decline include the COVID-19 pandemic and increased competition from imported furniture. In contrast, imports have consistently exceeded exports, with figures decreasing from \$129 million in FY19 to \$87 million in FY20 due to the pandemic, but recovering to \$36 million in the first half of FY21 (Siddiqui, n.d.).

There are several issues of significant importance which the furniture design industry of Pakistan is facing. Among them are inadequate local raw material supplies due to examples such as deforestation, high competition from irregular players, and traditional methods that are not efficient. But major prospects exist for itself and other business. The increasing pace of urbanization and the expanding middle and affluent classes will be the main sources of sustainable demand in the long term. Moreover, policy measures such as the support of ‘original equipment manufacturers’, or OEMs, along with established outlet and brand recognition improves the industry’s capacity.



The organized sector of the market is dominated by businesses targeting high-end customers. These companies collaborate with large retail chains and have strong brand identities. Examples include Interwood Mobil, Workman Furniture, Habitt Furniture, National Furniture, and ChenOne. While some players use imported wood, the majority of the industry relies on local Sheesham (rosewood) wood (Siddiqui, n.d.).

The industry remains largely labor-intensive, although a few major players are gradually shifting toward automation. Additionally, the rise of e-commerce and online shopping is influencing the industry, with small online businesses capitalizing on these trends. Overall, the Pakistani furniture industry is evolving to meet changing consumer preferences and the

growing demand for modern, high-quality furniture (Alda, n.d.).

5. Challenges and Opportunities:

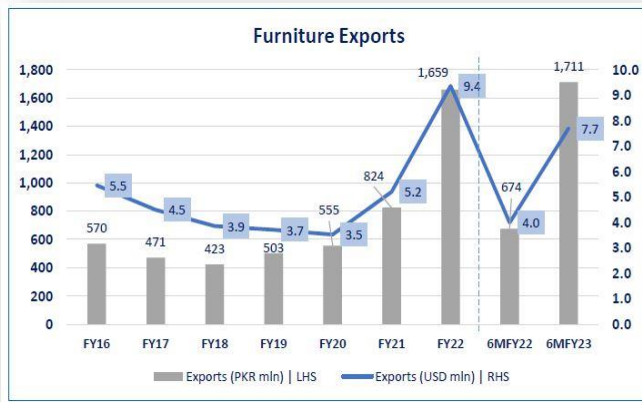
5.1 Challenges:

The Pakistani furniture industry faces several key challenges that are hindering its growth and competitiveness; the first and almost paramount challenge being, which lies in the lack of skilled employees in operating companies and furniture industries (Khawaja, 2016). This shortage results to substantial production and time constraints in executing export orders because woodworking forms the basic skill set required in cutting intricate designs of furniture and the strength of such furniture. Availability of workers has a few challenges, including scarcity of vocational colleges to offer such training, poor wages, and lack of interest among the youths in the wooden products molding industry(Asif, 2023).

Another important issue is the fact that most furniture producers encounter very high costs and low output due to the use of outdated tools and technology, low quality tools and instruments, and high reliance on manual labor (Khawaja, 2016)(Agencies, 2022). It therefore results in high costs and low quantities produced, thereby meaning that local producers of furniture cannot cope with cheap imitated furniture, especially from China(Asif, 2023)(Agencies, 2022).

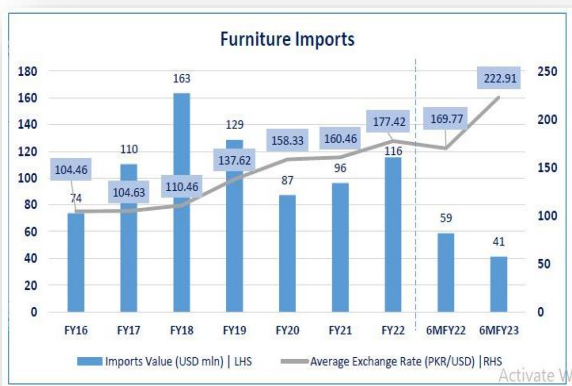
The influx of cheaper imported furniture, particularly from China, has captured around 70% of the local market, leading to declining sales for domestic manufacturers(Qureshi et al., 2020)(Agencies, 2022). Chinese furniture is seen as modern and sleek, even though it is often of

lower quality and starts deteriorating after a few months(Tauseef et al., 2023). However, Pakistan still imports over \$100 million worth of furniture annually, while exporting only around \$5 million(Tauseef et al., 2023).



Just like any industry it is facing skyrocketing costs of raw materials as the price of woods, chip board and many others have gone up by 50-100% in the last few years. This is due to the fact that there is a chronic scarcity of wood supply in the country attributable to deforestation; hence most producers have to depend on imported timber. Because of the acute shortage in availability of wood, the cost for sheesham wood has gone up from Rs. 3000 per foot to over Rs 6000 per foot for kikar wood price has gone up by Rs 1500 per foot.(Asif, 2023).

The furniture industry in Pakistan is mainly made up of small scale industries that constitute 85-95% of manufacturing units and active production facilities which means that the mechanization density of the industry particularly in terms of adopting and integrating new technology into the value chains is still very low as the small scale furniture manufacturers cannot afford to constantly innovate their manufacturing process by bringing in advanced technology into the manufacturing value chain (Agencies, 2022)(Khawaja, 2016), The above fragmentation is made worse by the contemporary economic problems, for instance, the enduring double-digit inflation which decreases the purchasing power of manufacturers besides shrinking their profit margins (Asif, 2023). To address such challenges, the industry has no options other than to embrace technological solutions; build quality human capital; and invest



in high quality materials, among leveraging for a competitive marketing on export markets (APP, n. d)(Agencies, 2022). The areas which require the most development include the governmental policies, infrastructures and marketing aspects to deal with problems such as outdated machinery, insufficient tools and manual labor; these conditions lead to increased costs and reduced productivity affecting its competitiveness in the international level (Khawaja, 2016)(Agencies, 2022).

The limited published information on furniture clusters in Pakistan provokes an extensive research and development deficit that has hampered the further development of this industry. However, there is very little research done in the context of Pakistan in understanding how furniture as a regional cluster could unlock productivity improvement and innovation in the sector(Naqvi et al., 2021). There are few purely local studies thus the analysis of dynamics, craft, and markets is weak, which inhibit the formulation of proper policies and strategies to support the sector. However, there is no adequate information available regarding the furniture industry in Pakistan such as the regional associations, total manufacturing units, showroom and exporters(Group, 2017). This lack of information poses limitation because most decision makers cannot make sound decisions about investment, marketing and development strategies. Lack of reliable and complete information makes it difficult to determine the size of the industry, to analyze favorable conditions in the market, as well as to search for cooperation and development prospects. Again the main cause for this is that the furniture sector is highly fragmented with many small scale producers and hence the challenge of formulating and implementing a coherent, well-coordinated strategy for growth(Khaskhely et al., 2021). Therefore, to meet all these factors, it is paramount to work on these data gaps in the hope of increasing the order of the furniture industry in Pakistan, especially in Sindh where the industry seems to have lots of room to grow and export their products(Group, 2017).

5.2 Opportunities

The situation analyzed for the furniture industry in Pakistan reveals several growth prospects, which could be explored by exporters forcing new

directions in the future. The most promising factor is the ever growing rates of urbanization and the modern population's emergence of a new class of middle-income people, who are more likely to opt for contemporary and elite furniture designs. There is an increasing demand for quality furniture for residential and commercial buildings as people's disposable income has increased, thus improving the market for furniture producers and sellers (Tauseef et al., 2023). Further, the emergence of e-commerce in the country has provided other opportunities for furniture selling where manufacturers and dealers have established new channels of selling their products online. It also helps to improve the sales and advance the opportunities of accessing the new markets that were not available before in the past. The partnership between local producers and global retailers as well as manufacturers including the proposed 'Furniture City' in Faisalabad with IKEA is the most suitable example of innovation and modernization within the sector(APP, 2023). This will seek to set up international benchmarks in the production of furniture and could potentially generate a lot of employment hence boosting the economy of this region. In addition, supportive regulation by the government such as incentives towards construction has the potential of increasing the uptake of furniture as more residential and commercial buildings are put up. The increase in construction activities is expected in the near future, and this shall create the perfect environment for growth in the furniture industry since interior designing shall follow in equal measure. Hence, it is high time that the furniture industry in Pakistan steps up its activity and pooled these opportunities for boosting the activity in the domestic market and for better competitiveness in the international markets with an aim to capture a superior portion of the global furniture market(*Secondary Analysis of Pakistan's Furniture Sector*, 2014).

6. Environmental Sustainability:

Environmental sustainability in the furniture design industry in Pakistan is a critical area of focus, particularly in light of the challenges and opportunities identified in this research paper.

6.1-Current Environmental Challenges:

There is much environmental problem which Pakistan furniture industry has to encounter,

mainly because of non-renewable resources and conventional processing. The LCA study of the wooden furniture manufacturing industry in the Mardan division of the Khyber Pakhtunkhwa province showed that the significant proportion of the total energy applied in the process is provided with fossil origin and causes considerable GHG emissions. Specifically, the study revealed that the total embodied energy for making the non-organic wooden furniture set was estimated to be 30,005 MJ for the most part of which came from non-renewable sources. (Ali et al., 2022).

Further, it plays a part in giving way to deforestation and uses a high amount of carbon footprintage for different kinds of furniture. For example, it has been revealed that the carbon dioxide emissions per item in a Local Industry such as the Sofa Set was observed to be as high as 540 kg CO₂ equivalent; therefore require sustainable practices which may help in the reduction of impacts (Ali et al., 2024).

6.2- Opportunities for Sustainable Practices

However, the following are some of the opportunities of improving the sustainability of the furniture design industry: As a solution, utilizing of ecologically friendly materials and technologies seems to be rather effective. As for the companies' practices, N. M. Furnishers insists on using environmentally friendly material sourcing and encourages customers to use and select materials wisely (Hassan, 2024).

Also, new recycling campaigning as apply by Unilever Pakistan / Green Earth Recycling Recycling sell a new concept of turning used plastics into sustainable furniture. This approach also helps in stopping plastic pollution while at the same time reducing the consumption of wood which leads to the preservation of forests. Such measures are indicative of poly cyclic economy models that involve re-cycling of materials in other production processes instead of dumping them into dumping sites.

Recommendations for Sustainable Development

Thus to provide a sustainable environment in furniture design industry in Pakistan there should be the following measures. Energy management in furniture manufacturing can be enhanced through usage of renewable energy sources like the solar energy hence cutting down on emissions of CO₂. So there is need to have measures to control air and water pollution in the manufacturing facilities to

cater for the environmental costs of the industry. Looking for substitute materials like recycled plastics and eco-friendly timber can help decrease on usage of non-renewable resources and the rate of deforestation. Organizations' should come up with ways of encouraging designers to factor sustainable solutions into their designs, thereby coming up with products that are beautiful and sustainable at the same time. Helping consumers be aware of the negative impact that their decision to purchase particular furniture can have to the environment will motivate the consumers to demand green furniture from the manufactures (Jee, 2023). At the moment there are numerous environmental issues that furniture design industry in Pakistan has to deal with but many prospects to act sustainably are present there as well. In particular, it is possible to emphasize the significance of such areas as renewable energy use, recycling, and responsible procurement to become an environmentally friendly business and satisfy customer demand and needs.

7. Conclusion and Recommendations for Improvement

This paper is an attempt to review strategies that can be employed in promoting environmental sustainability in the furniture design industry. First, the shift from conventional energy to the green sources like solar energy in production can vastly lower the carbon emissions in producing furniture. It will also reduce greenhouse gas emissions, which have been caused by industries emitting large amounts of carbon dioxide both locally and internationally, thus moving towards cleaner production methods. Also, it is important to note that the use of pollution control devices in industries is a necessity for managing air and water pollution. Such actions can solve the issues concerning environmental loads in relation to the furniture manufacturing processes with improved working conditions and the reduced effect of industry on the environment (Ali et al., 2024). Additionally, the research of new materials, for example, postconsumer plastics and certified woods, can help to avoid the usage of raw materials that are limited and lead to the scarcity of trees. Thus, furniture manufacturers can play a part in making their supply systems environmentally friendly and meet the customer demand for goods that are friendly to the planet. It is also important to

advocate for sustainability in design; when designers are encouraged to consider sustainability when designing their products, they can come up with products that are pleasing to the eye and at the same time, sustainable. This approach entails the consideration of the life cycle of a product and reducing the adverse impact of the product at each phase of its life cycle (Ali et al., 2024). However, informing the consumers on the effects of their purchasing behaviors on the environment will help increase demand for sustainable furniture products. In turn, by informing consumers about the need to select products that are environmentally friendly, manufacturers will be forced to embrace environmentally friendly practices in a bid to satisfy the ever demanding market. Finally, the furniture industry can collaborate with research institutions and universities to get familiar with updated sustainable technologies and standard procedures. They can promote the exchange of information, combined studies, and the creation of new initiatives to tackle several problems in the area. Altogether, these strategies can further improve the sustainability of furniture design industry in Pakistan to a considerable extent (Hassan, 2024).

In conclusion, the furniture design industry in Pakistan is threatened by several environmental concerns but if PPD furniture producers also follows these recommendations, it has capacity of becoming pioneer in sustainable production. The industry being conscious on the availability of renewable energy sources in producing electricity, responsible sourcing of materials, application of sustainable design and encouraging the consumers to make informed decisions, then the industry will have greatly contributed to the conservation of the environment. Furthermore, by solving problems like the expensive raw materials, machinery that is out of date, and competition with imported furniture, the industry becomes more competitive as well as can focus on sustainability issue. Therefore, by leveraging the current chances as people across the world embrace green practices, the furniture design industry in Pakistan can display the nation's unique artistic and caliber alongside making a favorable impact to the environment. Additionally, the incorporation of more training institutes to educate people in the industry about the current and upgraded practices keeping up with the worldwide R & D can have a

significant impact on improving the handicaps presently faced by the furniture industry.

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