

FutureBridge

CAPABILITY SHOWCASE

Appliances and Consumer Devices

Industrial Business Deck

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Table of Contents

- 01 [Market Overview](#)
- 02 [Challenges and Opportunities](#)
- 03 [How FutureBridge can help?](#)

01

Market Overview

The global appliance industry may need to deploy around US\$250 billion over the next decade to build more automated, flexible, connected and regionally resilient manufacturing operations

— FutureBridge Research



Evolving appliance environment

Appliance innovations have not only transformed the way we perform daily chores but have also become an **integral part of our lifestyles**

- Hybrid Work Models/Remote Work
- Ergonomic workspaces
- Collaboration Spaces
- Hot Desking
- Co-Working Spaces

- Sustainable homes
- Remote work
- Smaller homes / living spaces due to urbanization
- Digitalization and smart homes
- Hyper-Local Neighbourhoods

- Gen Alpha more focused on AI
- Health Consciousness , Mental Health & Well-being
- Digital Detox
- Influencer Culture
- Gig Economy

- Smart infrastructure : IoT & Smart traffic management
- Multifunctional Spaces
- Self-sustained Spaces
- Multi Model Transportation
- Universal accessibility with Language inclusivity

- Omni-Channel Integration (Online with Offline)
- Blending Uses
- Niche Retail
- Personalized Services
- Rise of Pop-up stores with Modular layouts

- Farm-to-Table Movement – Direct sourcing
- Digital Ordering and Payment Systems
- Robotic staff
- Ghost Kitchens
- Digital Menus



Value Chain – key goals of players over the next 5 years

Players across the value chain will focus on capturing greater control over product architecture, customer relationships, operating data and lifecycle economics



Materials, components and subsystem suppliers

- Higher design influence
- Efficiency without cost escalation
- Regional supply capability



Appliance OEMs and brand owners

- Restoring margins in mature categories
- Premiumization with real differentiation
- Expansion into adjacent systems



ODMs, contract manufacturers and automation partners

- High-mix manufacturing
- Faster new product introduction
- Automated quality assurance



Distributors, retailers and e-commerce platforms

- Better fulfilment economics
- Installation attachment
- Financing and affordability



Installers, service networks and repair providers

- First-time-fix performance
- Service-plan monetisation

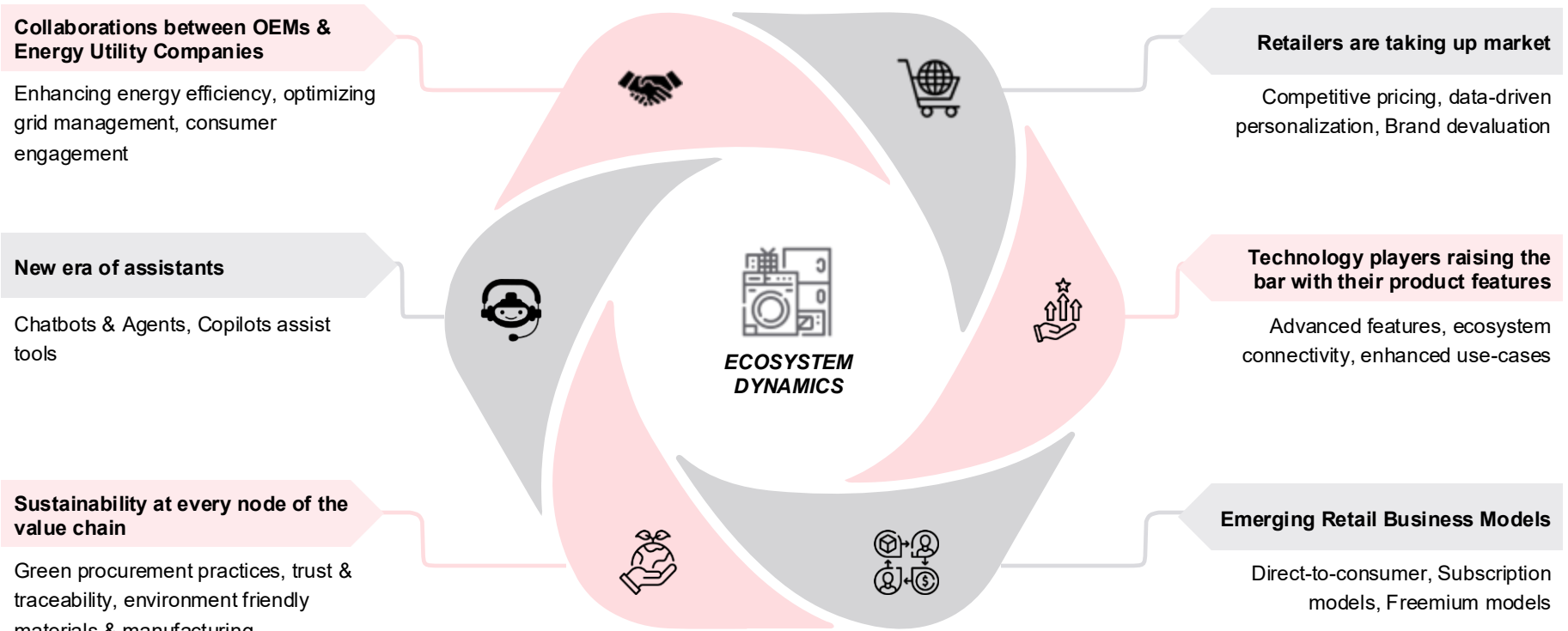


Smart-home, software and energy-platform providers

- Automation beyond remote control
- Energy orchestration
- Customer permission and data governance

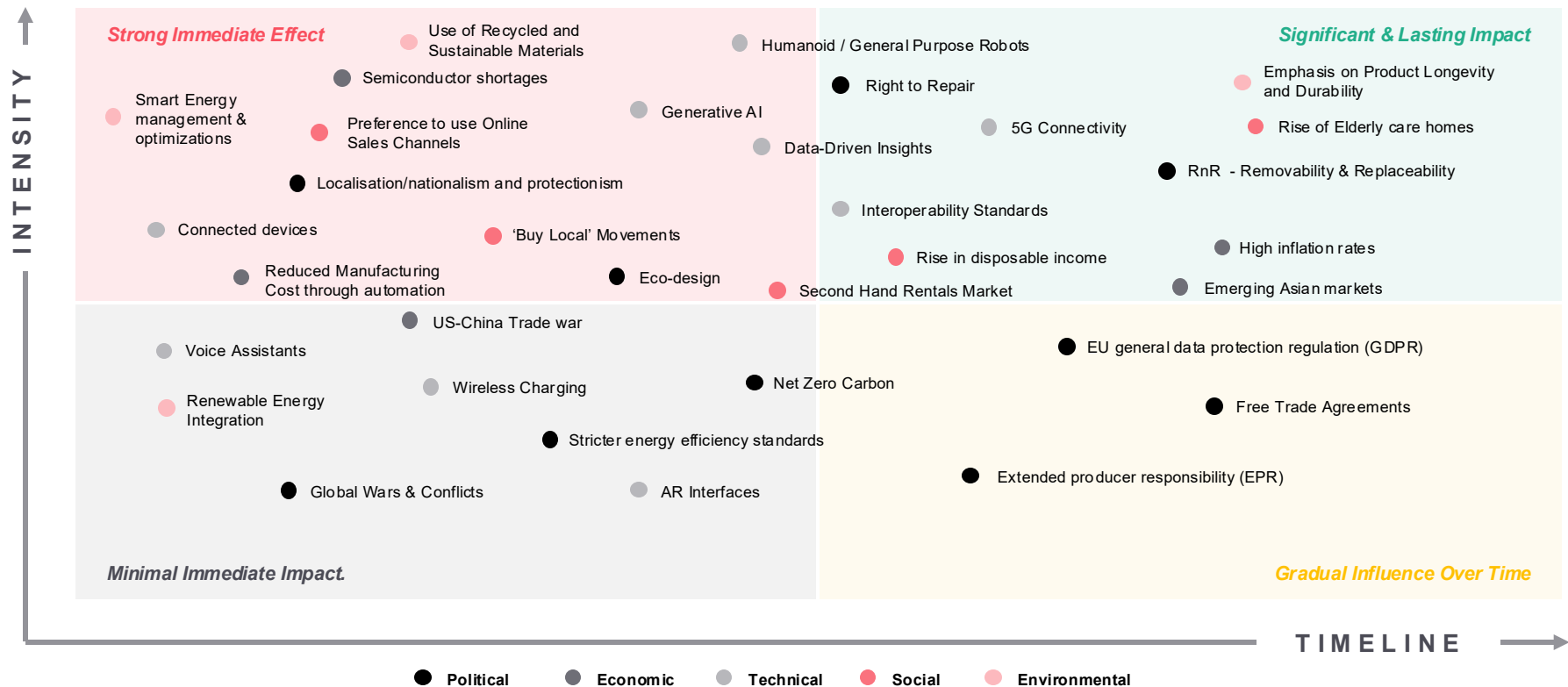
Ecosystem dynamics

Cross Industry collaborations, introduction of AI tools & assistants & new entrants carving a space for themselves is shaping the ecosystem dynamics within the appliance industry



PESTE trends impacting the appliances landscape

The PESTE trends are transforming the appliance landscape by **fostering innovation, enhancing sustainability & reshaping consumer preferences** towards smart & energy-efficient solutions.

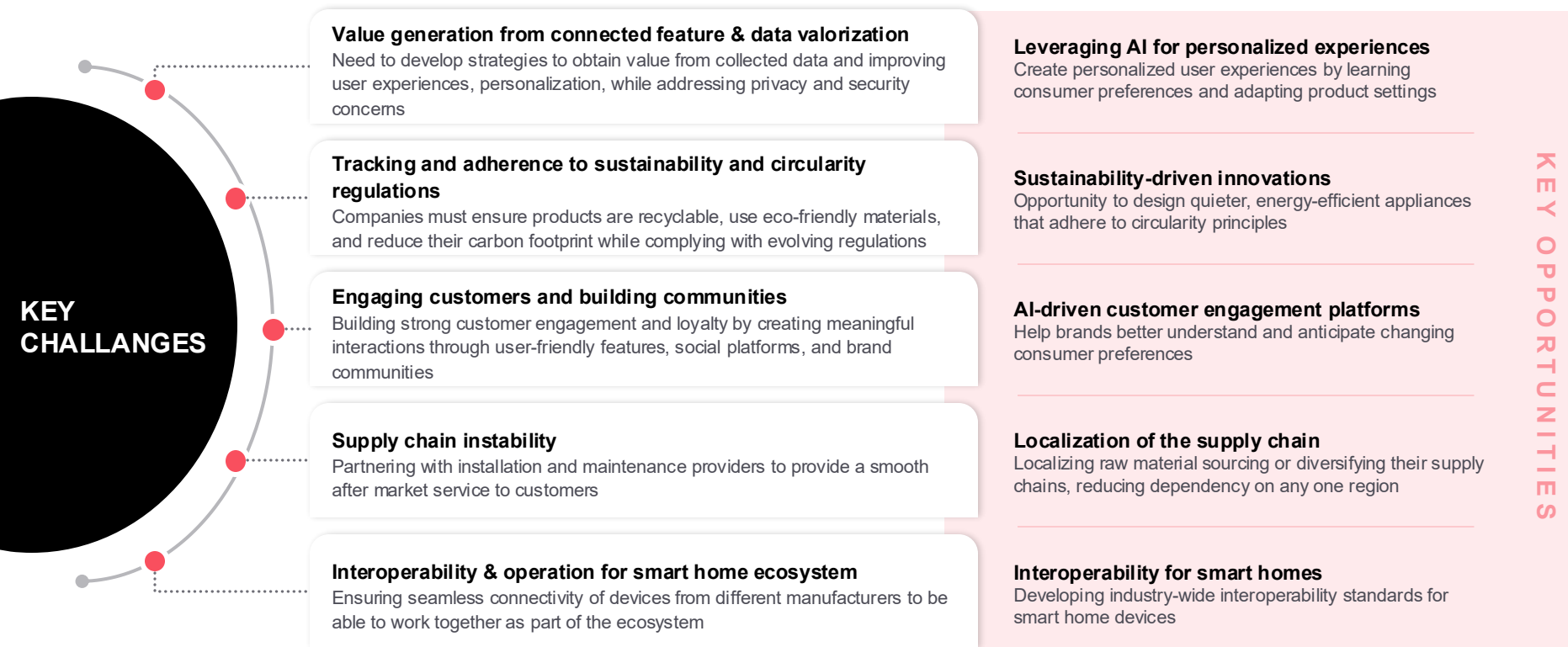


02

Challenges & Opportunities

Challenges and opportunities

With demand remaining promotion- and replacement-led, competitive advantage is shifting from standalone hardware toward AI-enabled, energy-flexible and lifecycle-supported appliance platforms.



Geography attractiveness matrix / Opportunities across Geographies

India and Southeast Asia offer the strongest combination of penetration-led demand and manufacturing investment, while opportunities in mature markets are increasingly concentrated in replacement, premium, HVAC, energy-efficiency and service-led segments

Increasing attractiveness →

EUROPE	CHINA	LATIN AMERICA	MIDDLE EAST	NORTH AMERICA	SOUTHEAST ASIA	INDIA
Replacement upgrades, built-in appliances, heat-pump drying, repairable products and regulatory-compliant premium offerings	Government trade-in subsidies generated strong 2025 sales growth Demand remains partly policy-dependent and may have been pulled forward	Demand remains comparatively positive, led by Brazil and periods of strong growth in Argentina Opportunity in affordable replacement, financing-led sales and locally produced mid-market appliances	Attractive for HVAC, premium housing, hospitality and project-based appliance solutions	Mortgage lock-in and 30-year-low existing home sales as key appliance demand headwinds Replacement-led products, repair and service, premium categories tied to eventual housing recovery, and locally manufactured appliances insulated from tariff risk	High long-term attractiveness, but uneven near-term demand Strongest opportunity in efficient cooling, compact appliances and regional production	Appliance penetration remains low Market combines mix of first-time ownership, replacement, premiumization and government support

Future Industry Direction

Future growth will be shaped less by broad-based volume expansion and more by localization, repairability, differentiated premium propositions and HVAC-led adjacencies

Two Speed Market



North America/Europe remain slow and promotion-heavy; India, parts of APAC, MEA and Latin America carry growth

Localization becomes non-negotiable



Tariffs, logistics volatility and geopolitics make regional manufacturing a strategic requirement.

Repairability becomes regulated



Spare parts, diagnostics, software support and product longevity become competitive criteria.

Premium wins only where use-case backed



Knowing how to do something doesn't necessarily mean that you can do it in practice. Here's a simple example. When you were a kid, you knew that to ride a.

HVAC and energy management become core



Air conditioning, heat pumps, thermal comfort, energy optimization and building-linked appliance systems become bigger growth pools than traditional white goods.

03

How FutureBridge can help

How can FutureBridge help?

The future of appliances will see smarter, AI-driven technologies with IoT connectivity, enhanced by sustainability-focused designs and eco-friendly materials. Geopolitical tensions will push for more localized manufacturing and diversified supply chains, while data-driven services and automation will further personalize user experiences and improve efficiency.

Innovation / Solution / Technology Scouting



Identify and evaluate technologies, solution providers, startups, OEMs and partners across packaging materials, formats, automation and digital layers.

Future Roadmaps & Future of X



Develop practical roadmaps showing how packaging technologies may evolve and where adoption should occur.

Customer Analysis & VoC



Identify customer needs, decision criteria, pain points and adoption barriers through stakeholder interviews, surveys and secondary research across target segments and value-chain participants.

Market and Competitive Analysis



Assess market size, growth drivers, demand pockets, competitive intensity, key players, offerings, pricing, differentiation and white-space opportunities across relevant geographies and applications.

Strategy (Positioning, GTM)



Define target segments, value proposition, positioning, entry routes, channel strategy, pricing logic and go-to-market priorities to support commercial launch or expansion decisions

M&A & Partner Identification



Identify and evaluate acquisition targets, technology partners, suppliers, distributors, OEMs and ecosystem players based on strategic fit, capabilities, market access and partnership potential

Case Examples – Innovation / Solution / Technology Scouting

Engagement	Type	Client's Background	Key Objectives Achieved
Technology Foresighting	.WFM Program	Leading automotive manufacturer	- Emerging Technology Discovery: Efficiently distinguish relevant signal clusters from one-off blips – especially in new or unfamiliar S&T domains - Technology Roadmap Analysis: Deliver a comprehensive evaluation of these technologies, offering actionable insights on their relevance, lifespan, and the necessity for client engagement
Breakthrough / Early-stage Technologies (Weak-signals)	WFM Program	German manufacturer of optical systems and optoelectronics	- Emerging Technology Discovery: Spot and assess early-stage technologies poised to hit the mainstream in the near future - Technology Roadmap Analysis: Track a relevant early-stage technology / weak-signal cluster through the “tipping point” from “interesting” to “actionable”
Glucose Monitoring Technologies for Diabètes Management	Hype Cycle Analysis	Leading healthcare provider	Identification of recent technologies for glucose monitoring and subsequent analysis of those technologies in regard to the current technical maturity, key-enabling technology elements, expected time frame by when they might become interesting for investment, and by when they will mature in the market segment

Case Examples – Innovation / Solution / Technology Scouting

Engagement	Type	Client's Background	Key Objectives Achieved
Connected Devices	Solution Scouting	Global Tobacco and Vaping products manufacturer	▪ <i>Improving the customer connected journey</i> - Assisted the client in scouting for device connectivity solutions by reducing dependency on mobile apps ▪ <i>Further, scouted for new features that can be embedded in the next gen devices that provide real value to the consumer.</i>
Water Enrichment Solutions	Technology Scouting	Leading player specializing in water treatment technologies	▪ <i>Technology Scouting</i>: Scouted for various water enrichment solutions having desired features such as efficient operation, mature technologies, etc. ▪ <i>Competitive Assessment</i> – Conducted a comparative assessment based on technical performance and viability for water bars by utilizing subjective and objective parameters such as maturity / availability, size, efficiency, stability, etc.
Connectivity and Digital Technologies – Beverage Equipment	Solution Scouting	Multinational food and drink processing conglomerate	▪ <i>Scouting Digital & connectivity enabled sustainability approaches</i> - Identify and analyze the approaches enabled by connectivity and digital technologies contributing to sustainability initiatives applicable to beverage equipment ▪ <i>Technology Scouting</i> – Identified ways to monitor consumables (accessories), and product (equipment) after the end of life. ▪ <i>Supplier Identification</i> – Comparison of suppliers and their offerings against each building blocks of the approach using KPIs related to technical performance, maturity and availability

Case Examples – Future Roadmaps & Future of X

Engagement	Type	Client's Background	Key Objectives Achieved
Equipment Platforms & Digital	Technology Roadmap	Global food and beverage leader	▪ <i>Roadmap development</i> – Create a technological roadmap and future pipeline of innovations for the client's equipment platform comprising of Coolers, Vending, Dispense System, Hydration / Beyond the bottle, Digital and Beyond the film (Bulk food).
Connected Appliances	Technology and feature analysis	Global Tobacco and Vaping products manufacturer	▪ Assisted the client in developing a digitalization strategy by analysing the features in comparable appliances and consumer products. ▪ The product technologies and features were correlated with market performance indicators.
Automotive headlamps	Technology Roadmap	Global lighting solutions provider	▪ Assisted the client in understanding future market needs in terms of new functionalities / features / requirements and provide assessment of technologies and capabilities which will enable these functionalities and lighting requirements for key markets. ▪ Further, assisted in identifying developers and suppliers of these technologies and solutions.

Case Examples – Market and Competitive Analysis

Engagement	Type	Client's Background	Key Objectives Achieved
Application scouting and Market Entry Strategy	Opportunity Analysis & Market Entry Strategy	Leading provider of medical diagnostic imaging solutions	<i>Market Trends and Opportunities:</i> Analyzed key trends in the robotics market, pinpointing growth areas and disruptive European companies shaping these opportunities. <i>Strategic Collaboration Models:</i> Created collaboration models for the client, identifying target customer segments and formulating a customized value proposition.
Consumer and Industrial Application Segments	Opportunity Identification, Evaluation, & Monitoring	Global semiconductor manufacturer	<i>Applications Identification</i> – Identified attractive New/Emerging application market segments in consumer and industrial areas that the client should target, besides the ones that they are already targeting. <i>Market attractiveness evaluation</i> – Conducted robust market attractiveness evaluation of shortlisted applications based on indicators of market potential (significant market in 2-3 years, ~million units/year), maturity (number of products, number of players, etc.), and, relevance to client's offerings
Wide Band Gap Semiconductors (SiC & GaN)	Value Proposition Analysis and Application Scouting	Global semiconductor manufacturer	<i>Overview of SiC and GaN Landscape:</i> Analyzed functional blocks in emerging applications of Silicon Carbide (SiC) and Gallium Nitride (GaN) for wide bandgap semiconductors <i>Value Proposition and Application Scouting:</i> Assessed module-level needs of SiC/GaN solutions to define value propositions and conducted thorough scouting of existing and emerging applications
Market entry strategies for Electric Water Heaters	Competitive Intelligence	International manufacturer of heating, industrial, and refrigeration systems	<i>Market Analysis and Segmentation:</i> Evaluated the market environment for electric water heaters, detailing current and future market sizes, segmentation by type, key suppliers, product offerings, pricing, and market shares. <i>Entry Strategies and Barriers:</i> Identified cultural barriers for new entrants and recommended effective market entry strategies, including distribution channel structures and main distributors

Case Examples – Strategy (Positioning, GTM)

Engagement	Type	Client's Background	Key Objectives Achieved
Future of Kitchen / Kitchen-as-a-Hub	Technology Scouting	Leading Snacks and Beverage producer	▪ <i>Understanding Future Innovations and Trends:</i> Assisted in identifying technologies in cooking appliances, and forecast the types of appliances that will appeal to the younger generation by 2030 ▪ <i>Assessing Market and Competitive Landscape:</i> Provided insights into the key manufacturers and external technology suppliers driving these innovations
Future of Detergents	Technology Landscape	Leader in household and personal care products	▪ <i>Facilitated Synergic Innovation Insights:</i> Identified key innovations that are synergic between machine manufacturers and detergent manufacturers ▪ <i>Competitive and Partnership Intelligence:</i> Delivered detailed competitive analysis of existing partnerships between machine and detergent manufacturers and identified potential partners positioning them for successful future collaborations
Laundry 2030	Future Scenario, Implications and Strategy	Leading player in furniture technology space	▪ <i>Future Scenarios evaluation:</i> Assisted in understanding the evolution of technological, societal and economic factors in the future leading to a transformation of consumer attitudes towards laundry by 2030. ▪ <i>Strategy:</i> Assisted the client with Actionable Strategies and Roadmap of Actions to address the most important future needs across multiple scenarios on Future of Laundry
Future of Laundry	Future Scenarios and Strategies	Leading player in home care category	▪ <i>Getting ahead of the curve</i> – Assited the client in understanding emerging technologies and business models in fabric care. ▪ <i>Strategy development</i> – Helped the client to understand licensing opportunities, competitors organic and inorganic strategy and emerging innovations in laundry category.



FutureBridge is a techno-commercial consulting and advisory company. We track and advise on the future of industries from a 1-to-25-year perspective.



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