A critical evaluation of the Jamaican furniture industry:- its current state and an approach for the future

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Thanks must also be extended to the furniture manufacturers who willingly gave information about their establishments that assisted in the compilation of this report and to individuals who provided information on the industry.

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Project Manager

CONTENTS

1.0 Introduction

This report aims at analyzing the current state of the Jamaican furniture industry. The motivation for this project comes against the backdrop of the decline and competition that the industry has been experiencing; evidenced by considerable reductions in the level of exports and significant increases in the level of imports. It aims at providing the impetus to engendering a change in the way the industry operates, through creating awareness of the current state of the industry and suggesting recommendations on the way forward for the future. This report therefore seeks to inform stakeholders about the current state of the industry so as to assist them in determining the appropriate strategy to achieve global competitiveness.

The methodology used to obtain current data on the industry was through a questionnaire approach. Questionnaires were fielded at different parish based meetings and were completed on site by the manufacturers who attended these meetings. Since the turn out at some of these meetings was low, many other manufacturers were conducted via the telephone medium. Only some of those contacted via this medium agreed to fill out the questionnaires. A total of 65 questionnaires were used to compile the findings of the study. Despite the small number of questionnaires information garnered was particularly useful in providing details about the current state of the industry.

There have been numerous studies conducted in the past with the broad objective of providing assistance to further the industry's development. The specific objective of many of these studies was twofold. Firstly, they sought to determine hurdles that were limiting the expansion and growth of the furniture industry; and secondly recommend and implement procedures to surmount these hurdles. A study conducted by the productivity sector of Jamaica Industrial Development Corporation (JIDC) aimed at providing assistance to the furniture industry. It revealed the factors that limited the sectors output and the changes to the way in which the industry operated that could result from the productivity sector's assistance.[1] The study outlined that assistance would be provided to the sector with regards to setting up methods and procedures of manufactures aimed at reducing cost and wastage while at the same time improving quality.[2] It was also recommended that marketing assistance be provided to the sector that would enable the effective promotion of their products locally and internationally.

Moreover, manufacturers and companies within the furniture industry have been beneficiaries of the government's assistance. A case in point is the Gem Furniture Company. Through the Industrial Development Unit of the Caricom Secretariat, Commonwealth Fund for Technical Cooperation, assistance was provided to Gem Furniture Limited at the request of the Jamaican government. Support was provided in the following aspects of the company operations:

- designing and implementing the layout of the manufacturing plant that would result in maximum efficiency;
- the execution of highly optimal production procedures and practices that would include production scheduling and material controls systems; and

[1] Productivity Centre of JIDC. *Report on Furniture Manufacturers Report No.1*. May 1969. 1
[2] Ibid.,19

- overseeing the implementation of recommendations and training requirements of employees.[3]

Today however, such assistance is not forthcoming and as a result, this has somewhat constrained the growth of the industry.

The report is structured as follows. Section two, analyses the performance of the furniture industry over the period 1991 – 2001. Section three, discusses the findings of the survey. Section four concludes by suggesting a way forward for the future of the Jamaican furniture industry.

[3] Commonwealth Secretariat. Commonwealth Fund for Technical Cooperation. Industrial Development Unit. *Jamaica Productivity Improvement, Gem Furniture Company Ltd*. June 1985

2.0 The performance of the furniture industry

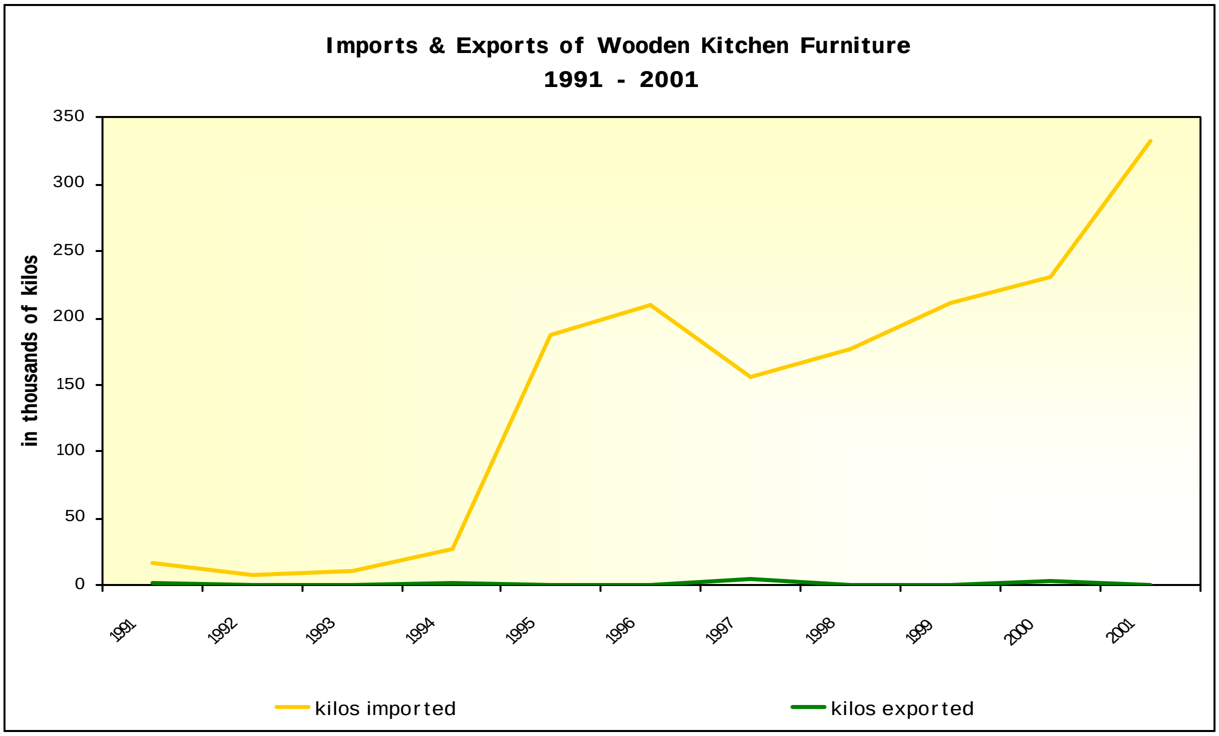
The performance of the Jamaican furniture industry over the last decade has been abysmal. Indicators such as exports reflect this poor performance and thus declining importance of this sector to the Jamaican economy. Furthermore, the industry has been facing increased competition from imported furniture. The cases of wooden kitchen and bedroom furniture are used to illustrate the trend of increasing imports and declining exports that have been plaguing the industry.

2.1 Case of kitchen furniture[4]

The data indicated that imports of kitchen furniture increased significantly over the period under review (1991 – 2001). In 1991, for instance, imported kilos numbered 16,205, by 1995, that number had more than doubled to 186,861. By 2001, the imported kilos numbered 331,172. This represents a 1944% increase in imports of kitchen furniture over the period 1991 - 2001. The data indicates that the level of exports not only fluctuated greatly but also that the amount exported was very low. For instance, in 1991, 1,847 kilos of kitchen furniture was exported. By 1992, that amount had dropped precipitously to 40 kilos and in 1993; there were no exports of kitchen furniture. However 1994, saw kilos exported increasing to 2,064. By 1995, only a year later, the figure fell to zero. This example indicates the fluctuating trend that characterized exports of kitchen furniture over the review period. Figure 1, gives a graphical representation of exports and imports of wooden kitchen furniture over the period 1991 – 2001.

[4] See table A1and A2 in appendix which gives imports and exports respectively of kitchen furniture over the period 1991 - 2001

Figure 1



2.2 Chief sources of imports of kitchen furniture[5]

The data indicates that imports of kitchen furniture into the island over have been substantial.

Table 1[6] illustrates that the chief sources from which these imports originated were the United States and Brazil.

[5]. A chief source is defined as any country from which the level of imports of kitchen fumiture into the island in any particular year is equal to or exceeds 40%

[6] See table A3 in appendix which presents this table in full

Table 1

Chief sources - imports of wooden kitchen furniture 1991 - 2001 (expressed as percentage of total kilos imported)											
Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	61%	98%	88%	94%	-	-	46%	46%	-	-	-
Brazil	-	-	-	-	-	-	-	-	44%	-	-

2.3 Chief markets for exports of kitchen furniture[7]

The data shows that exports of kitchen furniture are oriented towards the Caribbean and the United States. It is interesting to highlight the contrast with the import scenario, where kitchen furniture is imported from regions all over the world (see table A4 and A5 in appendix to make this comparison). Table 2[8] gives an illustration of the main export markets for kitchen furniture over the review period.

Table 2

Chief markets - exports of wooden kitchen furniture 1991 - 2001 (expressed as percentage of total kilos exported)											
Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	-	75%	-	-	-	-	-	100%	100%	-	-
Barbados	100%	-	-	-	-	100%	88%	-	-	-	-
Dominica	-	-	-	66%	-	-	-	-	-	-	-
Guyana	-	-	-	-	-	-	-	-	-	100%	-

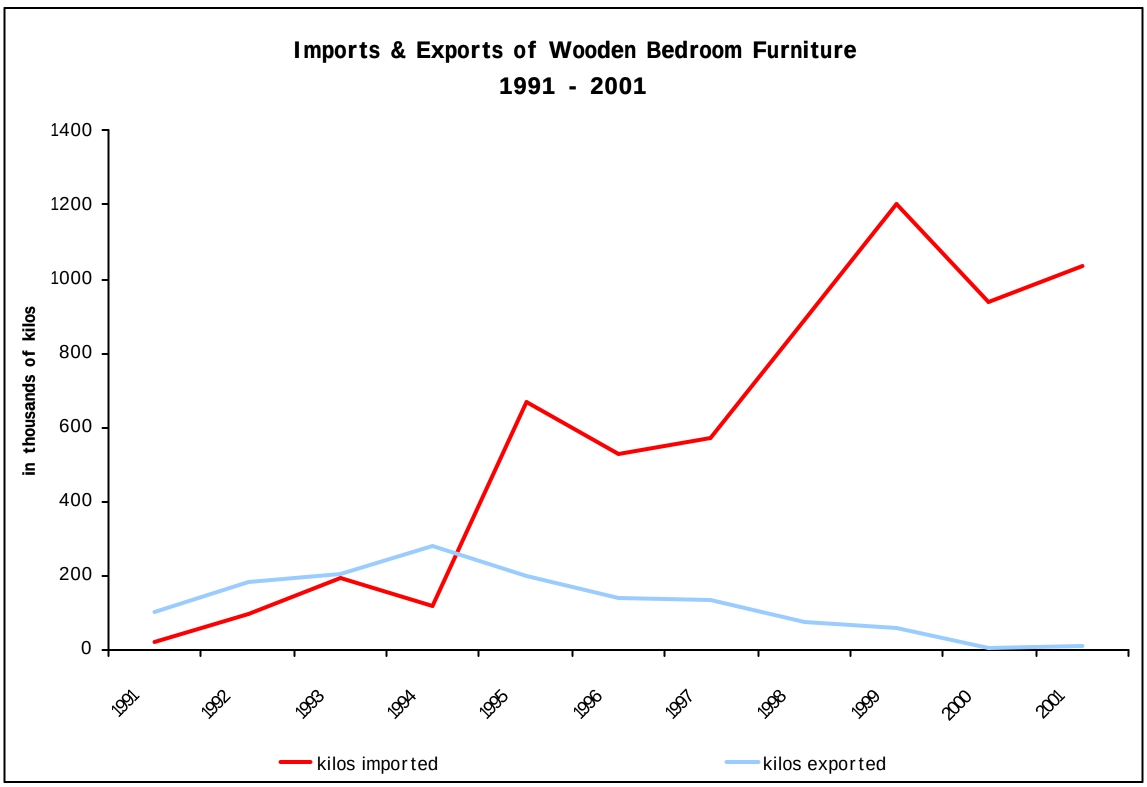
[7] A chief market is defined as any country to which the level of exports of kitchen furniture from the island in any particular year is equal to or exceeds 40%

[8] See table A4 in appendix which presents this table in full

2.4 Case of Bedroom furniture[9]

An examination of the case of bedroom furniture illustrates a trend of increasing imports and decreasing exports over the period 1991 – 2001. The data shows that even though there were some periods in which the quantity of imported bedroom furniture declined, for instance in the years 1994, 1996 and 2000 the trend has been one of an increase over the period. It is interesting to note that for the years 1991 – 1994 exports of bedroom furniture actually surpassed imports. However after 1994 up to 2000 the level of exports showed a consistent decline. This information is illustrated graphically in figure 2.

Figure 2



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[9] See table A5 and A6 in appendix which gives imports and exports respectively of bedroom furniture over the period 1991 - 2001

2.5 Chief sources of imports of bedroom furniture[10]

The data indicates that imports of bedroom furniture originate from regions all over the globe. Table 3[11] gives the chief sources of imports of bedroom furniture into the island. It shows that imports mainly originated from the United States, Malaysia and Brazil.

Table 3

Chief sources - imports of wooden bedroom furniture
1991 - 2001 (expressed as percentage of total kilos imported)

Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	88%	93%	93%	91%	42%	-	42%	-	-	-	-
Malaysia	-	-	-	-	41%	-	-	-	-	-	-
Brazil	-	-	-	-	-	-	-	63%	58%	47%	45%

[10] A chief source is defined as any country from which the level of imports of bedroom furniture into the island in any particular year is equal to or exceeds 40%
[11] See table A7 in appendix which presents this table in full

2.6 Chief markets for exports of bedroom furniture[12]

Table 4[13] outlines the chief markets for exports of bedroom furniture from the island. It shows that the main markets were the United States, Barbados and Trinidad and Tobago.

Table 4

Chief markets - exports of wooden bedroom furniture 1991 - 2001 (expressed as percentage of total kilos exported)											
COUNTRY	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**
United States	-	-	-	-	42%	39%	-	-	-	-	-
Barbados	54%	-	-	-	-	43%	-	43%	72%	60%	-
Trinidad and Tobago	43%	-	-	-	-	-	-	-	-	-	-

[12] A chief market is defined as any country to which the level of exports of bedroom furniture from the island in any particular year is equal to or exceeds 40%

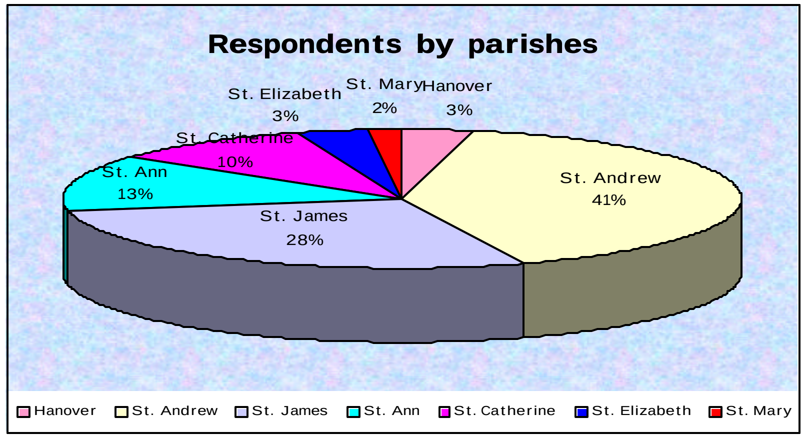
[13] See table A8 in appendix which presents this table in full

3.0 Presentation & analysis of results

3.1 Breakdown of respondents by parish

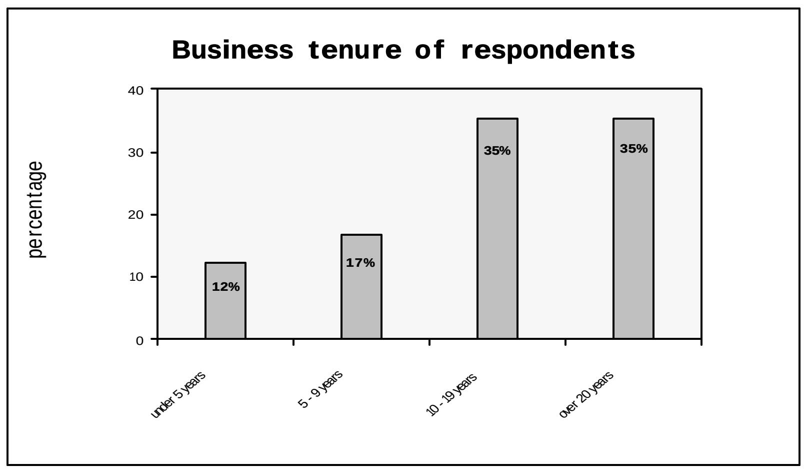
The data indicates that majority of respondents came from the parish of St. Andrew which accounted for a 41% response rate. The response rate from the other parishes was as follows:

- Hanover: 3%,
- St. James: 28%,
- St. Ann: 13%,
- St. Catherine: 10%,
- St. Elizabeth: 3% and
- St. Mary: 2%.



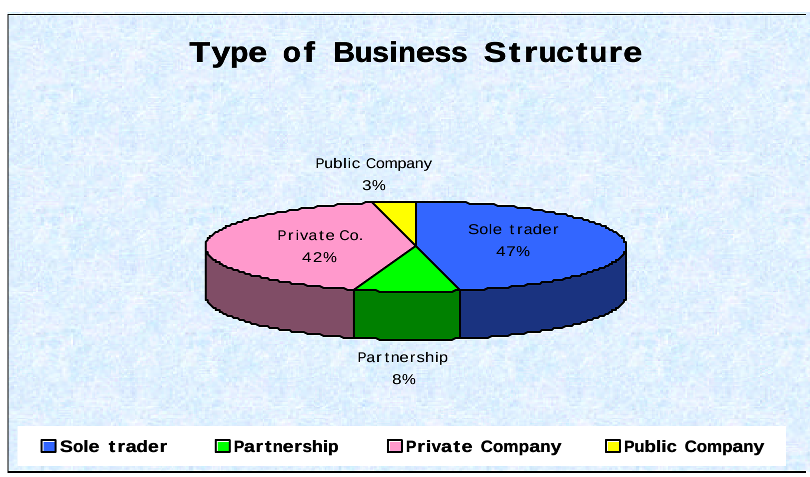
3.2 Business tenure of respondents

The data indicates an extensive tenure in the furniture industry for majority of participants in the survey. This is evidenced by an almost equal allocation in percentage of approximately 35% between those who were in business between 10 -19 years and those who were in business for over 20 years. 17% of respondents indicated being in business between 5 – 9 years, while 12% indicated being in business for under 5 years.



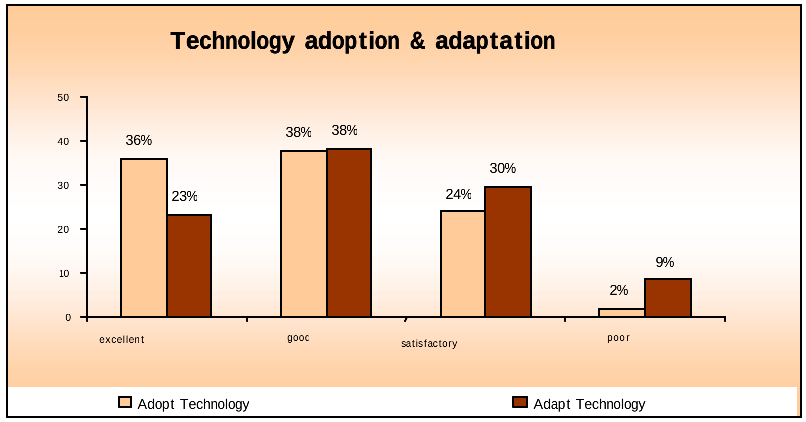
3.3 Type of business structure

Most of the respondents are sole traders. This is evidenced by approximately 47% indicating this type of business structure. Private companies were the second most dominant business structure while partnerships and public companies were the third and fourth dominant business structures respectively.



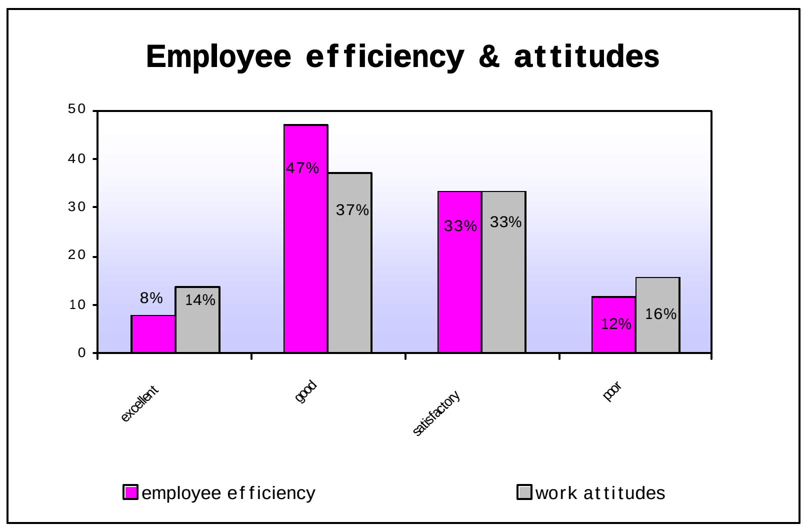
3.4 Technology adoption and adaptation/innovation

The data indicates that most of the furniture manufacturers in this study classify their level of technology adaption and innovation as good. Approximately 38% of respondents classified their level of technology adoption and adaptation as good. The numbers that classify their adoption and adaptation as excellent was also high. The results show that 36% and 23% classified their level of technology adoption and adaptation as excellent respectively.



3.5 Employee efficiency & work attitudes

Most of the respondents indicated a high level of worker efficiency and attitudes. This is evidenced by 47% indicating that their employees are efficient and 37% indicating that employee attitudes are good. Approximately 33% indicated a level of satisfaction with employee efficiency and worker attitudes. The numbers indicating a level of excellence with employee efficiency and worker attitudes were in the minority. This is evidenced by 8% and 14% indicating excellent employee efficiency and work attitudes respectively.



3.6 Relationship between human resource capacity and training

The data indicates a relationship between the level of training and education of employees and their human resource capabilities. The data revealed that those with employees who not only had training but a high level of training tended to possess good human resource capabilities.

3.6 1 Technological adoption by employees

36%, **48%** and **41%** of respondents classified technological adoption by managers, technical staff and skilled workers respectively as good. Within the managerial category, **2%** indicated managers having a primary level education, **7%** indicated that managers had secondary training, while **18%** and **7%** indicated that workers had graduate and post-graduate training correspondingly. Within the category of technical employees, **12%** of employees had secondary level training, **20%** had vocational training, **4%** graduate training and **12%** had post-graduate training. For skilled workers, **3%** indicated employee education at the primary level, **12%** indicated worker education at the secondary level, **24%** indicated worker education at the vocational level and **3%** indicated worker education at the post-graduate level.

3.62 Technological Adaptation / Innovation

Approximately **35%, 28%**, and **32%** of respondents described technological innovation by their managers, technical staff members and skilled workers respectively as good. The data also shows that majority of these categories of workers have training and education therefore corroborating the relationship between level of training and enhanced capabilities of the human resource of companies. For instance, within the managerial group of workers, **12%** indicated education at the secondary level, **10%**, indicated education at the graduate level, while **7%** indicated post graduate training. For skilled workers, ,**8%** indicated that workers had secondary level training, **20%** indicated that workers had vocational training, while approximately **3%** indicated that workers had training at the post-graduate level.

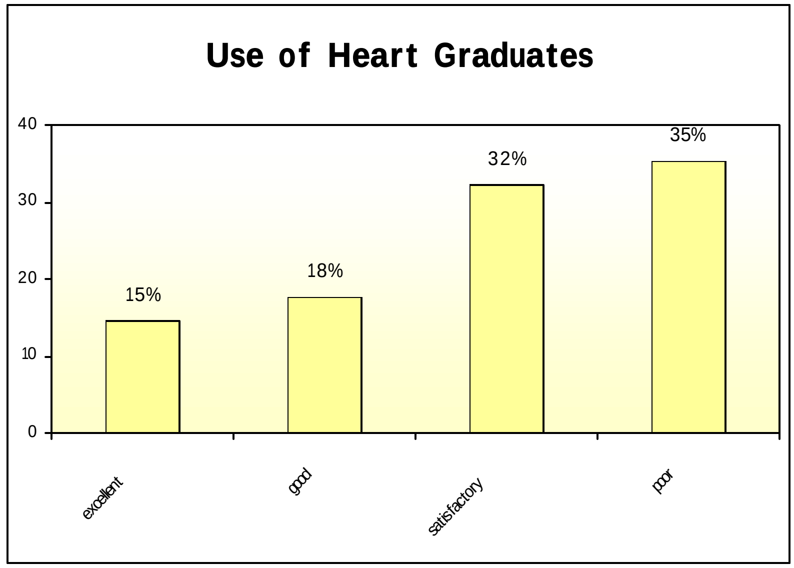
3.63 Employee efficiency

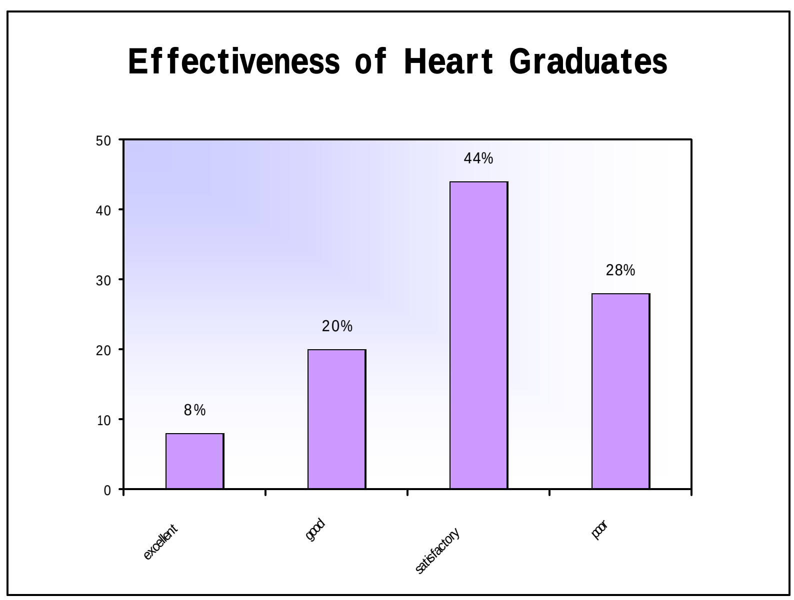
Approximately **41%** described their managers as efficient. Of this percentage, approximately **2%**, had primary level training, **10%**, had secondary level training, **15%** had graduate level training, and **12%** had post-graduate level training. Approximately **44%** classified the level of efficiency of their technical members of staff as good. Of this percentage, **7%** had secondary level education, **22%** had vocational level of training, **11%** and **3%** had graduate and post-graduate training respectively. For the skilled category of workers, **51%** of respondents classified their efficiency as good. Of this percentage **5%** had primary level training, **16%**, had secondary level training, **24%**, had vocational training, while **5%** had post-graduate training.

The data therefore illustrates a relationship between the human resource capabilities of employees and their level of education and training.

3.7 Use of Heart Graduates and Effectiveness of Heart Graduates[14]

Most of those that participated in the survey have not used heart graduates. This is evidenced by approximately 35% indicating poor use of heart graduates. Only 15% indicated regular use of heart graduates. Those that used heart graduates conveyed a level of satisfaction with their performance. This is evidenced by 44% indicating a satisfactory level with the effectiveness of heart graduates, the highest percentage of the different categories.





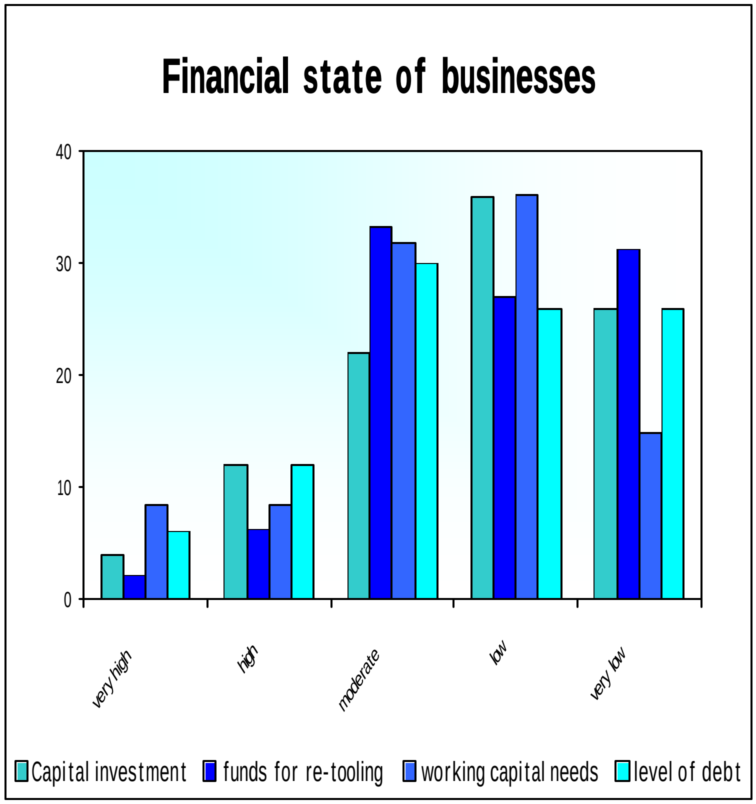
[14] Heart Graduates refers to those who have satisfactorily completed training by the National Training Agency, HEART Trust/ NTA

3.8 Financial condition of business

The majority of respondents indicated that available resources for capital investment, funds for re-tooling and servicing working capital needs are limited. This is corroborated by the percentages.

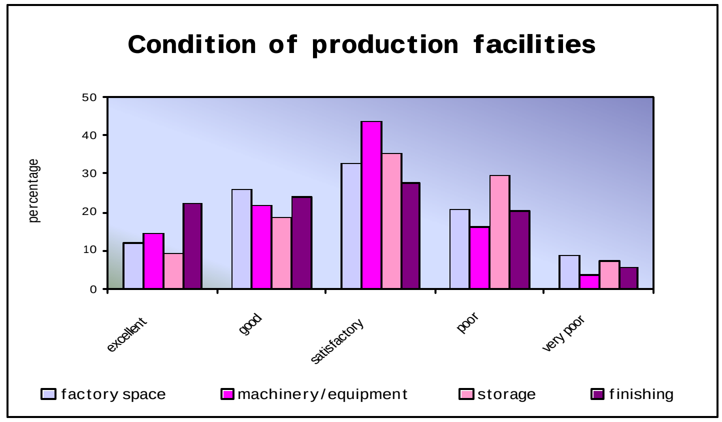
- A total of 62% of respondents indicated that funds for capital investment were either low or very low. Only a minority of 4% indicated that funds for capital investment were very high.
- A total of 58% indicated that funds for re-tooling were either very low or low. Only a total of 8% indicated that funds for re-tooling were very high to high.
- A total of 51% of respondents indicated that resources to service working capital needs were either low or very low.

It is interesting to note that most participants did not indicate a high level of debt, with a total of 52% indicating that their level of debt was either very low or low. Many indicated a reluctance to borrow funds in light of the current decline in the industry as they are convinced that their businesses cannot generate enough income to service debts.



3.9 Production Facilities

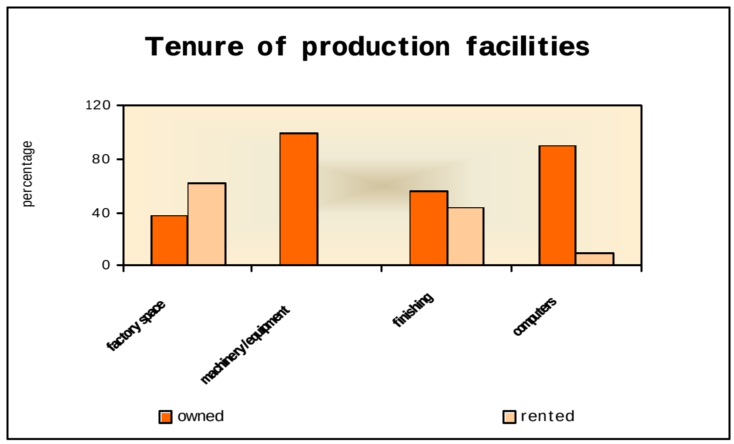
3.91 Condition/State



Satisfactory was the way in which majority of respondents classified factory space, machinery equipment, storage facilities and finishing area. The percentages were as follows:

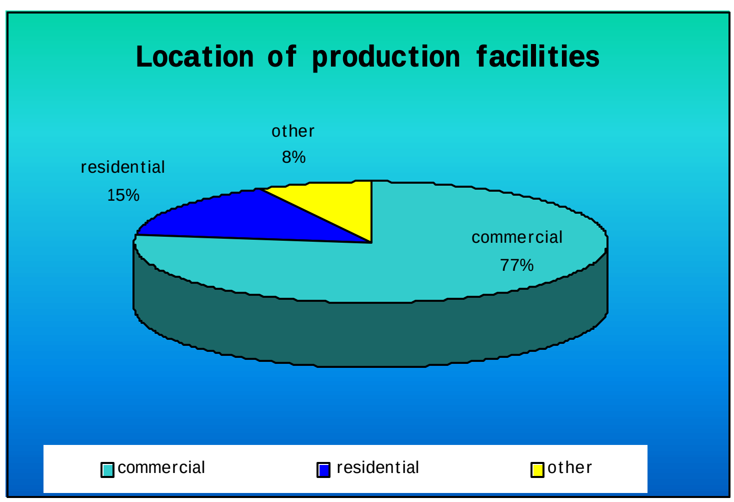
- 33% rated factory space as satisfactory
- 44% classified machinery / equipments as satisfactory
- 35% classified storage as satisfactory and
- 28% classified finishing facilities as satisfactory

3.92 Tenure of Production Facilities: Rented or Owned



This question had a very low response rate, therefore precluding any generalizations. Of those that answered, majority indicated factory space as rented, machinery/equipment as owned, finishing facilities as owned and computers used in the businesses as owned.

3.93 Location of production facilities

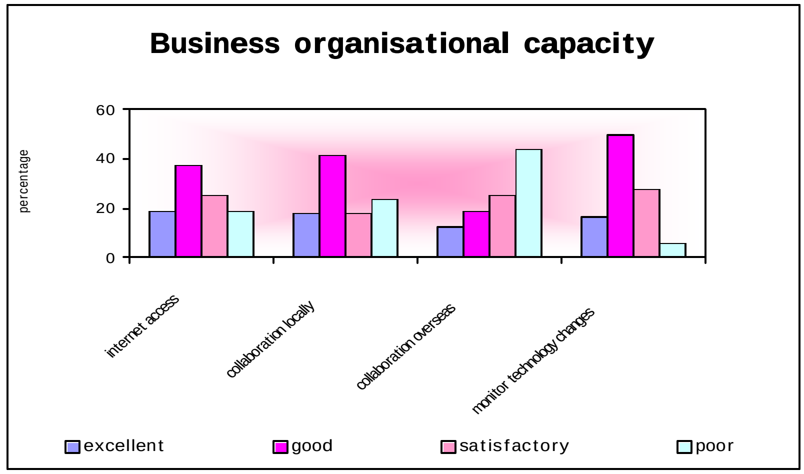


Majority of respondents indicated that production facilities were located in commercial areas. Only a few indicated that such facilities were located in residential areas, while even fewer indicated location in other areas such as schools.

3.10 Organisational Capacity and Potential

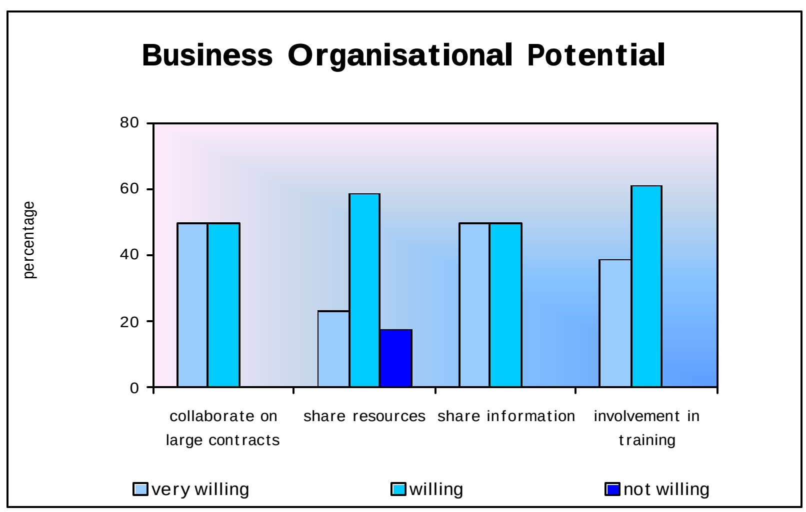
Organisational Capacity

Organisational capacity refers to a business' availability to internet access, extent of collaboration with local and overseas businesses and the extent to which technology changes are monitored. Majority of the respondents that used computers in their business classified internet access as good. Many of the manufacturers had also collaborated with other local furniture manufacturing businesses. However collaboration with overseas companies was limited as evidenced by 44% indicating that they had done no collaboration with overseas businesses. Many of the respondents monitored technology changes as evidenced by a total of 67% indicating that the extent to which they monitor technology changes is excellent or good.



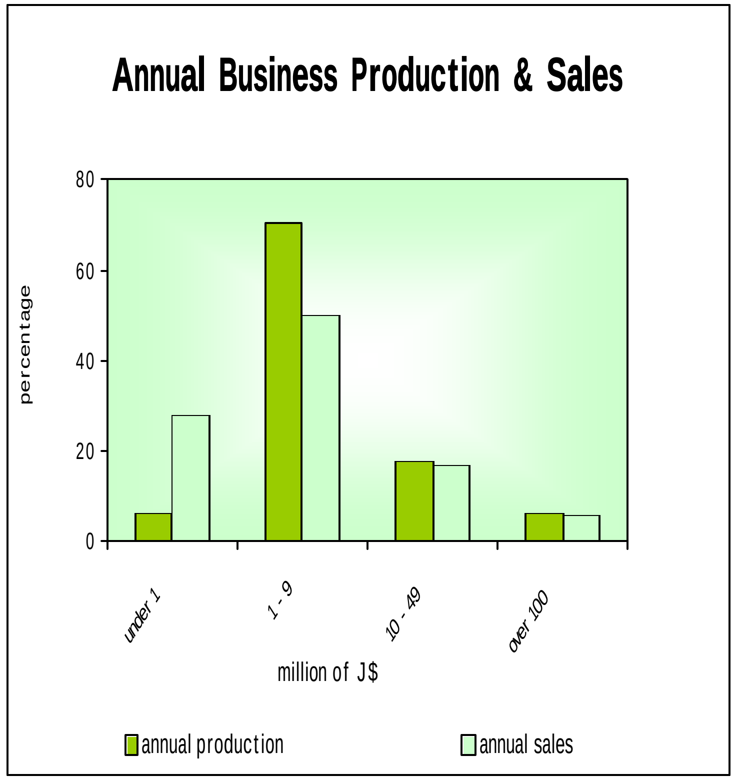
Organisational Potential

Organisational potential speaks to the ability and willingness of manufacturers to form partnerships and alliances. The main purpose of such alliances would be instrumental in fulfilling large contracts for instance. Majority of the respondents indicated a willingness to collaborate on large contracts, share resources, share information and be involved in training of personnel to work in the industry. This section has a low response rate and it can be argued that this is speaks to a reluctance on the part of those that did not answer to come together with other local manufacturers.



3.11 Size of businesses

The categories of annual business production and business performance give an indication of the size of the businesses that participated in this study. The data indicates that the majority of respondents are small sized businesses. This is evidenced by the fact that majority indicated an annual production of between $1-9mn, with the lowest category being under $1mn and the highest over $100mn. In fact 71% indicated annual business production of between 1 -9 mn. In terms of annual sales 50% indicated annual sales of between $1-9mn.



3.12 Orientation of production

Majority of the respondents produce for the local market. Only a few indicated production for the international market with demand from clients who they had served locally. Of those that produce for the local market, production is done mainly for consumers and retailers. Production for hotels only accounts for a minority of business.

4.0 The way forward for the Jamaican furniture industry

4.1 What can we learn from the data?

The data speaks to the fact that furniture manufacturers need assistance if the performance of the industry is to be improved. Firstly, majority of manufacturers revealed that funds for capital investment, re-tooling and servicing working capital needs were either low or very low. Therefore to further aid the development of the industry manufacturers would need assistance in this regard. However the data also revealed that before many manufacturers would take up such assistance, the industry has to show signs of a turn around, as many were not willing to get into any form of debt because of the current decline in the industry. Secondly, the state of production facilities was also described as merely satisfactory by many manufacturers. Therefore some assistance to manufacturers is needed to result in improved production facilities. Thirdly, a plan for the way forward that allows furniture manufacturers to take advantage of the hotel market would also be useful. Majority indicated that they produce mainly for local consumers and retailers. However the tourist industry in Jamaica is continually being developed and as such new hotels, both large and small are being built or refurbished. Government officials have often stressed the linkages that could be created between the furniture industry and the tourist industry. The National Industrial Policy spoke to this, where it was pointed out that the furniture industry had been benefiting and could benefit further from linkages with the Tourism Industry[15]. Therefore a strategy that provides assistance to the manufacturers enabling them to better qualify for hotel contracts could greatly improve the current decline of the industry.

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[15] National Industrial Policy – Growth and Prosperity : The way forward. 135

4.2 Additional factors that need to be incorporated into developing an approach for the future[16]

Manufacturers in the industry argue that the following must also be addressed to secure a profitable future for the Jamaican furniture industry:

- ✓ developing a local raw material resource base. Many point out that raw material is very expensive and moreover very difficult to source. This problem could be surmounted if a local raw material resource base existed.
- ✓ developing a design resource centre. Such a centre would service the needs of local manufacturers with respect to the sourcing of raw materials, design aspects, training of workers in the industry, linking buyers with producers not only local buyers but international buyers as well and also helping to keep manufacturers abreast of the latest changes in technology.
- ✓ developing a low-cost retail outlet for small manufacturers where they are able to display their products to consumers. The reality of the Jamaican furniture industry is that there exists many small players who have no outlet to showcase their products. This retail outlet is ideal for the small player in that it aims at marketing a product for manufacturers who do not have the resources – neither financial or in terms of a location – to do this independently.

[16] Garnered through speaking with manufacturers

4.3 Opportunities for the domestic furniture market

A consumer survey of the Home Furnishing Market reveals the existence of a domestic market for locally produced furniture and also ways in which local manufacturers need to execute production in order to satisfy this market. The findings that validate the existence of the domestic market can be listed as:

- ✓ the fact that consumers are not biased towards furniture produced abroad
- ✓ a satisfaction rate of 79% with local manufacturers
- ✓ approximately one million consumers in the market for home furnishings.[17]

The findings of the survey also address how furniture manufacturers need to carry out production to fully capitalize on this market. Firstly, even though consumers do not indicate a preference for foreign made furniture, the lack of a bias, is not on account of a belief that local furniture is of a higher quality. Therefore local manufacturers need to produce a product that "wins the test of quality"[18] of the consumer. Secondly, consumers are conservative in style preference; therefore traditionally styled furniture pieces have the greatest market acceptance, while modern styles have the lowest.[19] Thirdly, in cash sales the maximum price consumers are willing to pay ranges between $3,500 and $150,000. Approximately 67% of consumers are not willing to pay over $20,000 in cash sales. Fourthly, the market can be differentiated into three segments. The first segment, which is under 30 years has a preference for traditionally styled furniture and is willing to spend up to

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[17] Rohan Bell. Consumer Survey for Home Furnishing Market: Summary of Selected Findings. Commissioned by (Jamaica Business Development Corporation) JBDC

[18] Rohan Bell. Consumer Survey for Home Furnishing Market: Summary of Selected Findings. Commissioned by (Jamaica Business Development Corporation) JBDC

[19] Rohan Bell. Consumer Survey for Home Furnishing Market: Summary of Selected Findings. Commissioned by (Jamaica Business Development Corporation) JBDC

$20, 000. The second segment, young professionals aged 30 – 34 are willing to accept modern styled furniture and are willing to spend over $20,000 on any piece of furniture item in a cash sale. The third segment is the oldest and the most conservative in their willingness to spend. Therefore, manufacturers can target production to take account of the characteristics of the domestic market.

4.4 Strategy for the future

A successful future for the Jamaican furniture industry lies in a strategy that incorporates the main elements of focusing on improved design and presentation, production for high end consumers, and the cohesion of local furniture manufacturers.

Improving the design and presentation style of furniture manufacturers is critical to ensuring survival in an industry of intense global competition. For Jamaican furniture manufacturers to be successful in light of the global realities, it is imperative that improvement in design capabilities be aggressively addressed. This will ultimately improve their competitive edge in a global market of intense competition and puts them in a better position to capture niche markets in the international trade arena. Many of the countries that have successful furniture industries and are attempting to stave off global competition emphasize the importance of improving the design capabilities of their manufacturers. In Malaysia, for instance, a country that possesses a very successful furniture industry, government ministers have appealed to manufacturers to intensify their creation of furniture pieces with unique designs as this is what will give them an edge in the market place.[20] It is therefore essential that furniture

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[20] Pursue Design Excellence for Furniture Export Growth, Says Minister Lim. Retrieved from: www.mtc.com.my/news/pr160.htm Date of access. December 22, 2004.

manufacturers be provided with some form of assistance that will enable them to improve and enhance their design capabilities. The recently signed memorandum of understanding (MOU) between the Private Sector and The European Union is one avenue that could provide such assistance to furniture manufacturers. The MOU will see EU committing 20 million euros to the Private Sector Development Programme (PSDP). "The PSDP is a technical assistance programme jointly funded by the EU and the Jamaican government geared at strengthening the competitiveness of the private sector as it aims to enhance the competitiveness of micro, small and medium sized enterprises and to strengthen their support and representative organizations".[21] According to Head of the European Union in Jamaica, the PSDP will allow "Jamaican small and medium businesses access to new markets and develop new markets to be able to compete more effectively with international markets. He argued that it would engender better sustainability of business in Jamaica, increase revenues and result in more Jamaican businesses being a part of the formal economy"[22]. An avenue such as this could be pursued to provide assistance targeted towards developing the design capabilities of manufacturers in the industry.

To ensure the profitability of the industry, production should be oriented towards the high end market. Production of furniture pieces for high paying customers is dictated by the current realities of the global market place in which inexpensive pieces of furniture are readily available. Therefore Jamaican furniture manufacturers need to carve out a niche, both locally and internationally and satisfy that niche with well designed high quality pieces of furniture. The recent collaboration between international designer Ralph Lauren and The

[21] The Sunday Gleaner December 12, 2004. Section C
[22] The Sunday Gleaner December 12, 2004. Section C

Original Bamboo factory serves to represent a way in which local manufacturers could redesign their products and market them locally and internationally to high paying consumers. In refurbishing rooms at The Round Hill Hotel in Jamaica, world renowned designer Ralph Lauren teamed up with The Original Bamboo factory to create uniquely designed beds for the new rooms. Even though the beds were created for rooms at the Round Hill property, one can envisage the beds penetrating the local and international markets. The collaboration in this case was between a world renowned designer and a local manufacturer; such collaborative efforts can ultimately contribute to a strong and innovative sector with the necessary tenets to compete internationally. In fact with proper training in design techniques, local manufacturers can create their own designs. Furniture producers all over the world are realizing that in light of the saturation of cheaply produced items of furniture in the global market place, production aimed at high end consumers is one way to ensure the profitability of their industry. This is the thrust for the future of the Taiwanese furniture industry. Players in that industry have decided to produce pieces for higher end consumers in an attempt to maintain their place in markets such as Japan where their products are under intense competition from manufacturers in China.[23] Therefore they are continually designing new pieces targeted to high paying consumers. In response to the negative trend, Taiwanese manufacturers are utilizing innovative designs to penetrate the high end Japanese market and thus "escape razor thin profits" that plague traditional furniture manufacturers.[24]

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23 Taiwan Exhibitors Show Off Upmarket Efforts at IFFT 2002. Retrievd from: www.cens.com/cens/report/furniture/ifft.html date of access: December 22,2004.

24 Taiwan Exhibitors Show Off Upmarket Efforts at IFFT 2002. Retrievd from: www.cens.com/cens/report/furniture/ifft.html date of access: December 22,2004.

The cohesion of local furniture manufacturer is vital to the industry's existence. In a small economy such as Jamaica's, industries using collaborative strategies/approaches to compete effectively in the international market arena, share many advantages. Some advantages include their ability to procure "state of the art" equipment/technologies, capitalize on economies of scale, strength in market penetration, sharing of expertise, and capacity to respond to market demands. This approach would be particularly useful in servicing the tourist industry. In this way, they will be able to benefit from economies of scale and be able to benefit from the expertise of many manufacturers.

The following box explores one possible approach in which the furniture industry could be reoriented incorporating some of the elements discussed above.

The production of machine assisted heritage craft products[25]

This approach involves the production of small heritage craft pieces that can be sold to tourists on their visit to the island. It aims at changing the main orientation of the industry from the production of large furniture pieces mainly for the domestic market to the production of small heritage craft pieces for the international market.

This approach comes against the backdrop of increasing challenges facing the current approach of the industry. A few of them are:

- ✓ the fact that wood is not a generous resource
- ✓ the industry can be categorized as highly import dependent on its main input to production thus making it vulnerable to the vicissitudes of the international conditions
- ✓ the increasing difficulty associated with the importation of solid hard wood. For example, environmentalists all over the world are now against the cutting down of trees. Moreover in places like Brazil, where mahogany is indigenous; it is now under extreme restriction.

Essential to the success of this approach are several factors chief of which is large amounts of investment to get the venture operational. Furthermore, production has to be targeted towards a large market to ensure the venture's economic viability. Visitors to the island are one such market. Moreover, the upcoming staging of the World Cup Cricket which aims at brining many visitors to the island can provide another market for such a product. It is important that raw material be sourced locally. Raw materials could be created through a technological process that transforms the output of the sugar industry into engineered fiber board. Workers producing these pieces would have to be well trained. The training of personnel could be achieved through the development of programmes specifically targeted towards developing and enhancing the design capabilities of personnel in the industry. The final product would also have to be aggressively marketed. Marketing would seek to ensure that products reach the target market.

[25] Approach put forward by Mr. McIntosh (Sealy)

APPENDIX

Table A1

Imports of wooden kitchen furniture (in kilos) 1991 - 2001											
COUNTRY	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**
United Kingdom	650	-	430	1266	62	90	723	1020	9364	7251	455
Canada	85	45	68	216	86	2744	985	22720	12616	11031	8974
United States	9870	7183	9795	24998	43039	70294	72325	81810	65889	35866	102800
Barbados	-	-	-	-	-	-	-	-	-	-	-
Trinidad & Tobago	5600	111	-	-	600	-	2776	137	-	1722	-
Germany	-	-	654	-	1260	-	2840	80	-	-	194
Japan	-	-	205	-	-	124	-	-	-	370	58
Bahamas	-	-	-	-	-	-	-	-	-	-	-
Guyana	-	-	-	-	-	-	-	-	-	-	-
Dominica	-	-	-	-	-	-	-	-	-	-	-
Hong Kong	-	-	-	-	33171	20292	-	27	10	65	-
Malaysia	-	-	-	-	20285	69874	37283	-	-	-	16235
Brazil	-	-	-	-	37861	101	34354	67278	92251	141316	174601
Taiwan Province	-	-	-	-	49021	45526	-	-	255	11473	2213
Italy	-	-	-	-	1120	552	4758	686	90	-	-
Yugoslavia	-	-	-	-	356	-	-	-	-	-	-
Mexico	-	-	-	-	-	84	-	-	-	-	124
Panama	-	-	-	-	-	592	47	3923	13222	6807	4092
Indonesia	-	-	-	-	-	280	-	6	846	-	-
China	-	-	-	-	-	-	-	-	17298	9204	12197
India	-	-	-	-	-	-	-	-	-	333	40
Dominican Republic	-	-	-	-	-	-	-	-	-	27	-
Spain	-	-	-	-	-	-	-	-	-	5355	10430
Philippines	-	-	-	-	-	-	-	-	-	-	759
TOTAL IMPORTED	**16205**	**7339**	**11152**	**26480**	**186861**	**210553**	**156091**	**177687**	**211841**	**230820**	**333172**

Table A2

Exports of wooden kitchen furniture (in kilos) 1991 - 2001											
COUNTRY	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**
United Kingdom	-	10	-	-	-	-	-	-	-	-	-
United States	-	30	-	352	-	-	244	132	77	-	-
Barbados	1847	-	-	221	-	387	4391	-	-	-	-
Bahamas	-	-	-	10	-	-	-	-	-	-	-
Guyana	-	-	-	120	-	-	-	-	-	2600	-
Dominica	-	-	-	1361	-	-	-	-	-	-	-
Saint Lucia	-	-	-	-	-	-	350	-	-	-	-
TOTAL EXPORTED	**1847**	**40**	**0**	**2064**	**0**	**387**	**4985**	**132**	**77**	**2600**	**0**

Source of Table A1 and A2: External Trade Statistics 1991 - 2001

Table A3

Sources - Imports of wooden kitchen furniture 1991 - 2001 (expressed as a percentage of total kilos imported)											
COUNTRY	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**
United Kingdom	4%	-	4%	5%	-	-	-	1%	4%	3%	-
Canada	1%	1%	1%	1%	-	1%	1%	13%	6%	5%	3%
United States	61%	98%	88%	94%	23%	33%	46%	46%	31%	16%	31%
Barbados	-	-	-	-	-	-	-	-	-	-	-
Trinidad & Tobago	35%	2%	-	-	-	-	2%	-	-	1%	-
Germany	-	-	6%	-	1%	-	2%	-	-	-	-
Japan	-	-	2%	-	-	-	-	-	-	-	-
Bahamas	-	-	-	-	-	-	-	-	-	-	-
Guyana	-	-	-	-	-	-	-	-	-	-	-
Dominica	-	-	-	-	-	-	-	-	-	-	-
Hong Kong	-	-	-	-	18%	10%	-	-	-	-	-
Malaysia	-	-	-	-	11%	33%	24%	-	-	-	5%
Brazil	-	-	-	-	20%	-	22%	38%	44%	61%	52%
Taiwan Province	-	-	-	-	26%	22%	-	-	-	5%	1%
Italy	-	-	-	-	1%	-	3%	-	-	-	-
Yugoslavia	-	-	-	-	-	-	-	-	-	-	-
Mexico	-	-	-	-	-	-	-	-	-	-	-
Panama	-	-	-	-	-	-	-	2%	6%	3%	1%
Indonesia	-	-	-	-	-	-	-	-	-	-	-
China	-	-	-	-	-	-	-	-	8%	4%	4%
India	-	-	-	-	-	-	-	-	-	-	-
Dominican Republic	-	-	-	-	-	-	-	-	-	-	-
Spain	-	-	-	-	-	-	-	-	-	2%	3%
Philippines	-	-	-	-	-	-	-	-	-	-	-

Table A4

Markets - exports of wooden kitchen furniture 1991 - 2001 (expressed as percentage of total kilos exported)											
Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	-	75%	-	17%	-	-	5%	100%	100%	-	-
Barbados	100%	-	-	11%	-	100%	88%	-	-	-	-
Dominica	-	-	-	66%	-	-	-	-	-	-	-
Guyana	-	-	-	6%	-	-	-	-	-	100%	-
St. Lucia	-	-	-	-	-	-	7%	-	-	-	-
United Kingdom	-	25%	-	-	-	-	-	-	-	-	-

__Table A5__ (continues on next page)

Imports of wooden bedroom furniture (in kilos)
1991 - 2001

COUNTRY	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United Kingdom	-	170	197	-	17939	13244	193	74	332	141	-
Canada	100	4040		1000	248	1032	1572	6359	28454	31205	7760
United States	21264	90328	177880	106952	281252	176658	242039	287636	205454	196524	311936
Bermuda	-	-	-	-	-	-	-	294	-	-	-
Barbados	-	-	-	-	-	1331	2520	-	-	-	-
Antigua & Barbuda	1276	2069	9733	-	-	-	-	-	-	-	-
Trinidad & Tobago	-	-	-	-	17434	5250	-	7500	20490	3927	23832
Germany	-	-	4300	30	-	-	119	-	-	-	28
Japan	-	50	-	-	-	-	-	-	-	-	-
Bahamas	-	-	-	-	-	-	-	-	320	-	-
Guyana	-	-	-	10000	-	-	-	-	-	-	-
Dominica	-	-	-	-	-	-	-	-	-	450	-
Hong Kong	-	-	-	-	4922	50525	4900	-	-	60	-
Malaysia	-	-	-	-	271281	101530	118584	-	-	-	10877
Brazil	-	-	-	-	56316	72828	179051	556526	701745	438266	460269
Taiwan Province	-	-	-	-	15539	55911	20842		19785	34183	18696
Italy	-	-	-	-	600	155	71	29944	163147	170974	146526
Yugoslavia	-	-	-	-	198	-	-	-	-	-	-
Mexico	-	-	-	-	-	-	-	-	30201	1176	2797
Panama	50	-	-	-	-	34	-	1238	256	2173	2677
Indonesia	1604	-	-	-	738	-	-	80	596	210	3418
China	-	-	-	-	1294	38984	85	149	748	10270	25174
India	-	-	-	-	-	-	-	-	-	23	135
Dominican Republic	-	-	-	-	-	-	-	-	-	886	-

Spain	-	-	-	-	-	-	-	-	-	-	16382
Philippines	-	-	-	-	-	-	-	-	255	43849	-
Cayman Islands	-	-	-	80	-	-	761	404	544	-	-
Morocco	-	-	-	86	-	-	-	-	-	-	-
Christmas Islands (Germany)	-	-	-	15	-	-	-	-	-	-	-
Finland	-	-	-	-	119	-	-	-	-	-	-
Hungary	-	-	-	-	119	-	-	-	-	-	-
Senegal	-	-	-	-	-	11733	-	-	-	-	-
Guatemala	-	-	-	-	-	-	110	-	-	-	-
Netherlands Antilles	-	-	-	-	-	-	-	46	446	1280	-
Singapore	-	-	-	-	-	-	-	-	19	-	-
Venezuela	-	-	-	-	-	-	-	-	30812	660	2679
Switzerland	-	-	-	-	-	-	-	-	16	-	-
country not elsewhere specified	-	63	-	-	-	-	-	-	-	-	-
TOTAL IMPORTED	**24294**	**96720**	**192110**	**118163**	**667999**	**529215**	**570847**	**890250**	**1203620**	**936257**	**1033186**

Source: External Trade Statistics 1991 - 2001

Table A6

Exports of wooden bedroom furniture (in kilos)

1991 - 2001

COUNTRY	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United Kingdom	-	-	-	-	-	8521	-	-	2000	-	-
Canada	-	18	82	71	-	-	-	130	-	-	-
United States	2601	39929	64041	85851	83949	55092	31984	18184	832	1222	410
Cyprus	-	-	73	-	-	-	-	-	-	-	-
Barbados	56814	65519	56784	102455	63348	60035	49640	32020	40993	4680	-
Antigua & Barbuda	730	6319	1345	12469	102	11741	9192	399	425	-	3013
Trinidad & Tobago	44919	64422	32577	34835	42089	-	-	2738	-	1440	2711
Saint Kitts & Nevis	-	-	-	-	-	-	9340	17344	2394	-	-
Japan	-	-	-	-	-	-	-	-	47	-	-
Saint Christopher & Nevis	-	-	-	353	-	-	-	-	-	-	-
Bahamas	-	-	-	70	-	2667	-	-	-	-	-
Turks & Caicos Islands	-	-	-	-	-	1394	1560	-	-	-	2880
St. Vincent & The Grenadines	-	-	-	-	-	-	1342	-	2060	-	1080
Guyana	-	-	383	-	-	-	-	-	-	-	-
Grenada	-	106	26504	1591	-	-	-	-	-	-	-
Dominica	-	5873	-	1754	-	-	-	-	498	-	-
Saint Lucia	-	67	20798	40210	1890	112	1948	-	345	404	-
Suriname	-	-	-	-	-	-	2935	-	-	-	-
Puerto Rico	-	-	465	-	-	-	-	-	-	-	-
Belize	-	827	-	1700	5340	-	23036	3520	7690	-	-
Cayman Islands	-	45	368	640	1093	538	6042	390	-	50	-
Netherlands Antilles	118	-	-	-	-	-	-	-	-	-	-
Montserrat	-	-	-	32	-	-	-	-	-	-	-
TOTAL EXPORTED	**105182**	**183125**	**203420**	**282031**	**197811**	**140100**	**137019**	**74725**	**57284**	**7796**	**10094**

Source: External Trade Statistics 1991 - 2001

Table A7

Sources - imports of wooden bedroom furniture 1991 - 2001 (expressed as percentage of total kilos imported)											
Country	**1991**	**1992**	**1993**	**1994**	**1995**	**1996**	**1997**	**1998**	**1999**	**2000**	**2001**
United States	61%	98%	88%	94%	23%	33%	46%	46%	31%	16%	31%
Canada	1%	1%	1%	1%	-	1%	1%	13%	6%	5%	3%
Germany	-	-	6%	-	1%	-	2%	-	-	-	-
Guyana	-	-	-	8%	-	-	-	-	-	-	-
Malaysia	-	-	-	-	11%	33%	24%	-	-	-	5%
Brazil	-	-	-	-	20%	-	22%	38%	44%	61%	52%
United Kingdom	4%	-	4%	-	-	-		1%	4%	3%	-
Trinidad and Tobago	35%	2%	-	-	-	-	2%	-	-	1%	-
Taiwan Province	-	-	-	-	26%	22%	-	-	-	5%	1%
Hong Kong	-	-	-	-	18%	10%	-	-	-	-	-
China	-	-	-	-	-	-	-	-	8%	4%	4%
Italy	-	-	-	-	1%	-	3%	-	-	-	-
Panama	-	-	-	-	-	-	-	2%	6%	3%	1%
Japan	-	-	2%	-	-	-	-	-	-	-	-
Spain	-	-	-	-	-	-	-	-	-	2%	3%

Table A8

Markets - exports of wooden bedroom furniture

1991 - 2001 (expressed as percentage of total kilos exported)

Country	1991	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001
United States	2%	22%	31%	30%	42%	39%	23%	24%	1%	16%	4%
Barbados	54%	36%	28%	36%	32%	43%	36%	43%	72%	60%	-
Trinidad and Tobago	43%	35%	16%	12%	21%	-	-	4%	-	18%	27%
Antigua and Barbuda	1%	3%	1%	4%	-	8%	7%	1%	1%	-	30%
Dominica	-	3%	-	1%	-	-	-	-	1%	-	-
Grenada	-	-	13%	1%	-	-	-	-	-	-	-
Belize	-	-	-	1%	3%	-	17%	5%	13%	-	-
Cayman islands	-	-	-	-	1%	-	4%	1%	-	1%	-
Saint Kitts and Nevis	-	-	-	-	-	-	7%	23%	4%	-	-
Suriname	-	-	-	-	-	-	2%	-	-	-	-
St. Vincent & Grenadines	-	-	-	-	-	-	1%	-	4%	-	11%
Panama	-	-	-	-	-	-	-	-	-	-	-
Bahamas	-	-	-	-	-	2%	-	-	-	-	-
Turks and Caicos islands	-	-	-	-	-	1%	1%	-	-	-	29%
St. Lucia	-	-	10%	14%	1%	-	1%	-	1%	5%	-
United Kingdom	-	-	-	-	-	6%	-	-	3%	-	-

This survey is undertaken by the Jamaica Furniture and Wood Products Association (JaWFA). It will facilitate the preparation of a Profile on the current state of the industry and enable the formulation of strategies for the way forward in positioning towards global competitiveness and to attract investment.

Please complete and select the most applicable response by checking the appropriate box for each questions/items posed in this questionnaire.

BUSINESS PARTICULARS:

1. **Name of Business:** ____

   ____

2. **Address of Business:** ____

   ____

3. **Telephone:**____________________________**Fax:**____________________________

4. **Web-site:**____

5. **E-mail:** ____

6. **Name of Respondent:** ____

7. **Position of respondent:** ____

8. Indicate the location of the Business:

? Kingston	? St. Catherine	? St. James	? Hanover	? Clarendon
? St. Andrew	? St. Thomas	? St. Mary	? Portland	? St Elizabeth
? Westmoreland	? Manchester	? Trelawny	? St. Ann	

9. Indicate the number of years in Business:

? Under 5 years	? 5 – 9 years	?10 – 19 years	? Over 20 years

10. Indicate the main line(s) of your Business:

	Furniture manufacturing		Fixtures & Joinery		Design
	Crafts & Accessories		Architect		Raw materials supply
	Furniture retailing	? Others____________________			

11. State form of Business (Ownership Structure):

? Sole Proprietor	? Partnership	? Private Company
? Public Company	? Franchise	

12. **Indicate the Nationality of Majority Ownership:**

? Jamaican	? Caribbean	? Foreign – other than Caribbean

HUMAN RESOURCE

13. **Indicate the lowest levels of Qualification/Training of your employees in these categories:**

	Managerial	Technical	Skilled	Unskilled
None	?	?	?	?
Primary	?	?	?	?
Secondary	?	?	?	?
Vocational	?	?	?	?
Graduate	?	?	?	?
Post - graduate/Professional	?	?	?	?

14. **Indicate the highest levels of Qualification/Training of your employees in these categories:**

	Managerial	Technical	Skilled	Unskilled
None	?	?	?	?
Primary	?	?	?	?
Secondary	?	?	?	?
Vocational	?	?	?	?
Graduate	?	?	?	?
Post-graduate/Professional	?	?	?	?

15. **Indicate the salary range of your employees:**

	Managerial	Technical	Skilled	Unskilled
J$8,000-16,000 per month	?	?	?	?
J$16,500-34,000 per month	?	?	?	?
J$35,000-70,000 per month	?	?	?	?
J$75,000-125,000 per month	?	?	?	?
Over 125,000 per month	?	?	?	?

16. **Indicate the employment status of your current employees:**

	Full-time	Part-time	Casual
Under 5 employees	?	?	?
5 – 9 employees	?	?	?
10 – 19 employees	?	?	?
20 – 49 employees	?	?	?
50 – 99 employees	?	?	?
Over 100 employees	?	?	?

17. **Indicate the employment status of your employees 3 years ago:**

	Full-time	Part-time	Casual
Under 5 employees	?	?	?
5 – 9 employees	?	?	?
10 – 19 employees	?	?	?
20 – 49 employees	?	?	?
50 – 99 employees	?	?	?
Over 100 employees	?	?	?

18. Indicate the likely reason(s) for the changes in items 16 and 17 above:

	Full-time	Part-time	Casual
Expansion in Business	?	?	?
Business Down-turn	?	?	?
Winding Down	?	?	?
Others	____________________	____________________	____________________

19. Indicate frequency with which you change your employees:

	Managerial	Technical	Skilled	Unskilled
1 – 4 Weeks	?	?	?	?
1 – 3 Months	?	?	?	?
6 – 12 Months	?	?	?	?
1 – 3 years	?	?	?	?
Over 3 years	?	?	?	?

20. Indicate the level of your company's human resource capacity:

	Excellent	Good	Satisfactory	Poor
Adopt technology	?	?	?	?
Adapt technology/innovate	?	?	?	?
Employee efficiency	?	?	?	?
Work attitudes	?	?	?	?
Use of HEART graduates/Trainees	?	?	?	?
Effectiveness of HEART graduates	?	?	?	?

RAW MATERIALS RESOURCES

21. State the primary source of over 50% of your raw materials:

? Domestic	? Asian	? North America	? Caribbean	Others ________________

22. Indicate level of ease in importing your raw materials:

? Easy	? Moderate	? Not so easy	Others ___________________

23. If answer to question 22 above is "Not so Easy" what are the primary problems:

? Problems at Customs	? Technological Problems	? Too Much Taxes	Others________________ _______________________

FINANCIAL RESOURCES

24. Assess the Financial position of your Business:

	Very high	High	Moderate	Low	Very low
Capital Investment	?	?	?	?	?
Funds for Re-tooling	?	?	?	?	?
Working Capital needs	?	?	?	?	?
Level of Debt	?	?	?	?	?

25. Indicate the level of support received from Materials/Financial Providers:

	Material Suppliers	Banking Institutions
Very Good	?	?
Good	?	?
Satisfactory	?	?
Poor	?	?
None	?	?

PRODUCTION FACILITIES

26. Indicate the adequacy of your production facilities:

	Excellent	Good	Satisfactory	Poor	Very Poor
Factory Space	?	?	?	?	?
Machinery/Equipment	?	?	?	?	?
Storage	?	?	?	?	?
Finishing	?	?	?	?	?

27. State condition of tenure of production facilities:

	Owned	Rented	Other
Factory Space	?	?	
Machinery/Equipment	?	?	
Storage	?	?	
Finishing	?	?	
Adequacy of Computers	?	?	

28. State the area your production facilities is located in:

? Commercial Area	? Residential Area	Other ______________________

ORGANISATION

29. Indicate the level of your Company's Organizational Capacity:

	Excellent	Good	Satisfactory	Poor
Internet access	?	?	?	?
Collaboration with other local businesses	?	?	?	?
Collaboration with overseas businesses	?	?	?	?
Monitor industry technology changes	?	?	?	?

30. Assess your Company's Organizational Potential:

	Very willing	Willing	Not willing
Work together on large contracts	?	?	?
Share resources, i.e. space, machinery, etc.	?	?	?
Share information beneficial to industry	?	?	?
Involvement in training	?	?	?

31. Indicate Annual Business Performance in JA$:

	Production
Below 1 million	?
1 - 9 million	?
10 – 49 million	?
50 – 99 million	?
Over 100 million	?

32. Indicate Annual Business Performance in JA$:

	Sales
Below 1 million	?
1 - 9 million	?
10 – 49 million	?
50 – 99 million	?
Over 100 million	?

33. State the Main Markets for your products:

? Local	? Consumers/Retailers	Wholesales
	? Hotels	Other___________________________________
? Foreign	? Consumers/Retail	Wholesales
	? Hotels	Other___________________________________

STATE OF INDUSTRY

34. Indicate the degree of competitiveness of your company:

? Very competitive	? Moderately competitive	? Not competitive

35. If "Not Competitive" indicate your Company's need(s) in order to be competitive

? Financial	? State of the art technology	? Training
? Technical assistance in Design Capabilities		? Marketing

36. Indicate your alternative(s) if the industry dies.

? Migration	? Change Career
? Other Business	? Retire/Stop Working

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