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Joinery Industries

Finland, 6 - 26 August 1972

FURNITURE AND JOINERY INDUSTRIES IN MAURITIUS

Country Paper

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SUPPLEMENTARY REPORT ON THE
FURNITURE AND JOINERY INDUSTRIES OF MAURITIUS

by

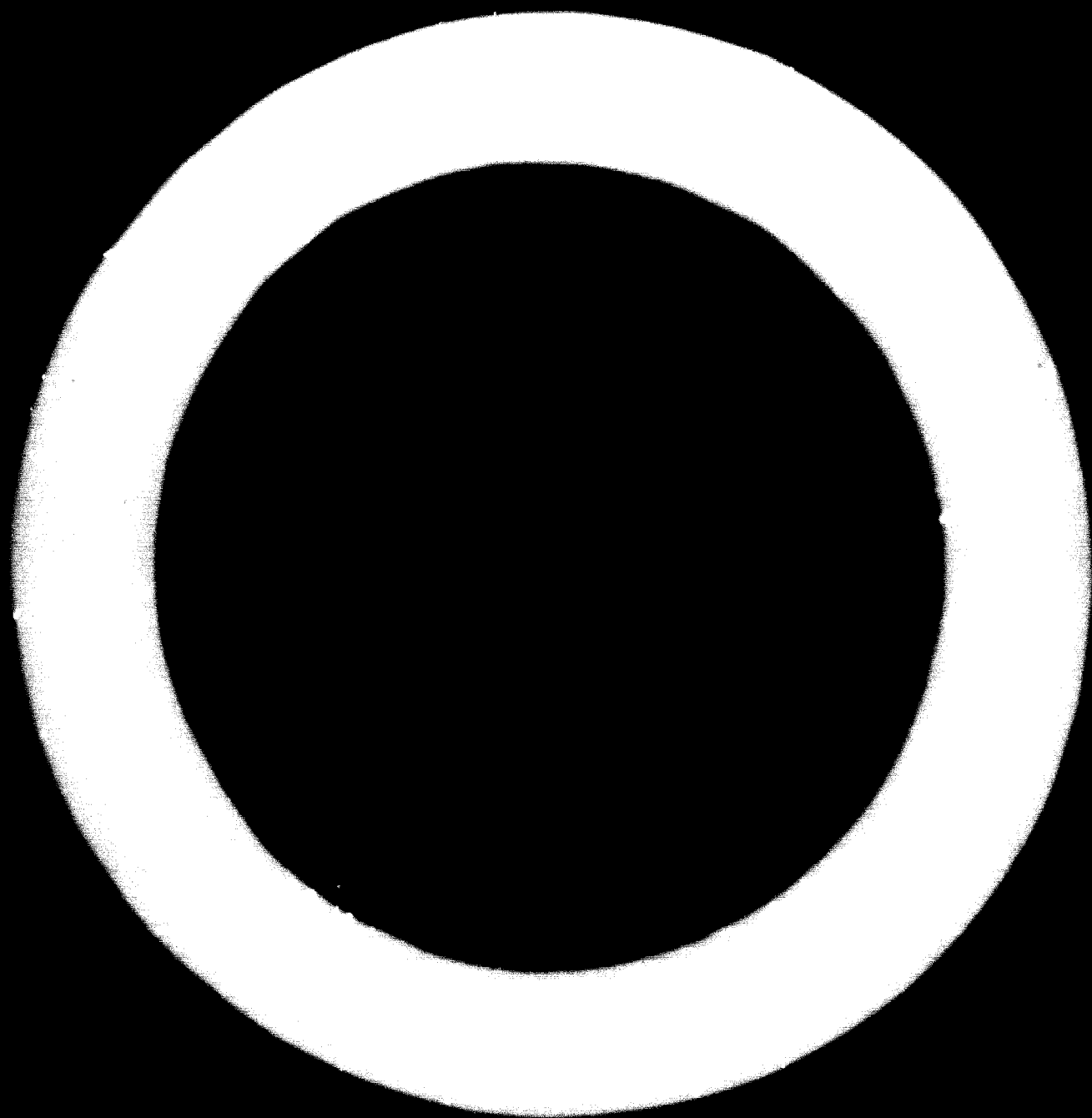
L. Koo Sin Lin
President

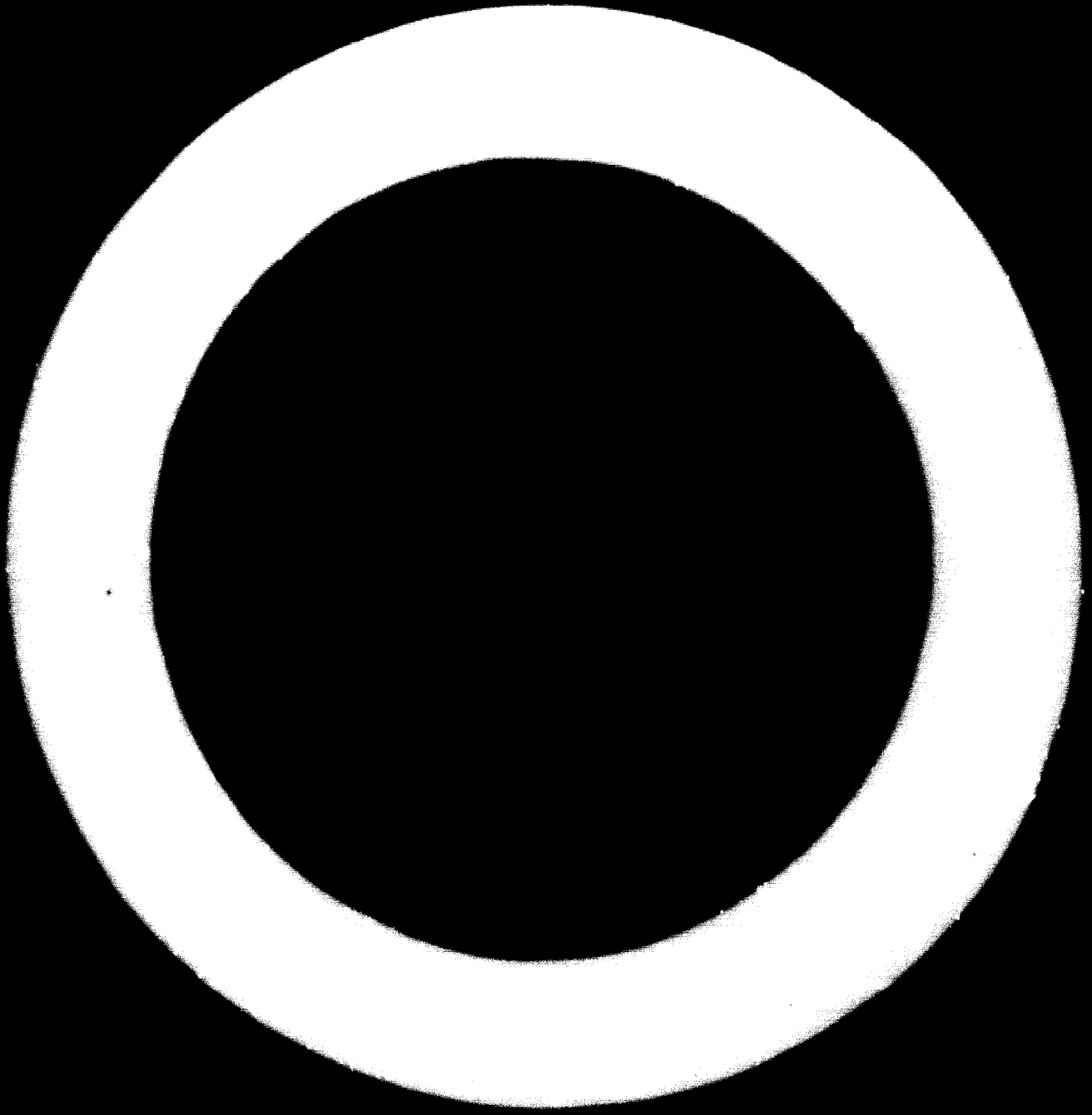
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According to the 1971 Census, the total number of establishments engaged in the manufacture of furniture and joinery parts was 325 employing 809 people.

Total labour force employed in 14 organized workshops ... 389
" " " " 311 small workshops 420

1. PRODUCTION FIGURES

(a) Labour cost:-

Average labour cost per 8 hour day in
organized workshops Rs 7.-
Average labour cost per 8 hour day in
smaller shops Rs 5.-

(b) Productivity:-

The industry is not geared to high productivity output. Emphasis is on quality, and labour productivity inputs are high grade, as good or better than average in the industry.

(c) Overhead:-

(i) There are only 32 administrators in the whole industry. They are wholly employed by the 14 larger establishments. Their total salaries amount to approximately 4% of costs.

(ii) Depreciation of plants (rents, rates, taxes, insurance and other charges) amounts to approximately 8.5% of costs.

2. VOLUME OF WOOD USED

(a) Production Furniture	Quality	Volume (Cubic feet)	Cost (Rupees)
	Fine Hard Woods (Imported)	5,000	150,000.-
(b) Modern Furniture	Fine Hard Woods (Imported and local)	18,000	18,000.-

	Value	Value	Value
	(Rs.)	(Cubic Feet)	(Rs. per Cubic Feet)
(c) Low-Cost Furniture	1,000,000	10,000,000	100
(d) Joinery Work	15,000,000	150,000,000	100

NOTE: Excluded from the above figures is the production and consumption of soft wood produced by the country's only modern sawmill, which is the sole concessionaire of Government forests. Figures published by them show that 45,000 cubic feet of treated soft wood were used exclusively by the building trade and for fence posts. There is almost no soft wood used in the furniture industry.

3. RECOVERY AND YIELD

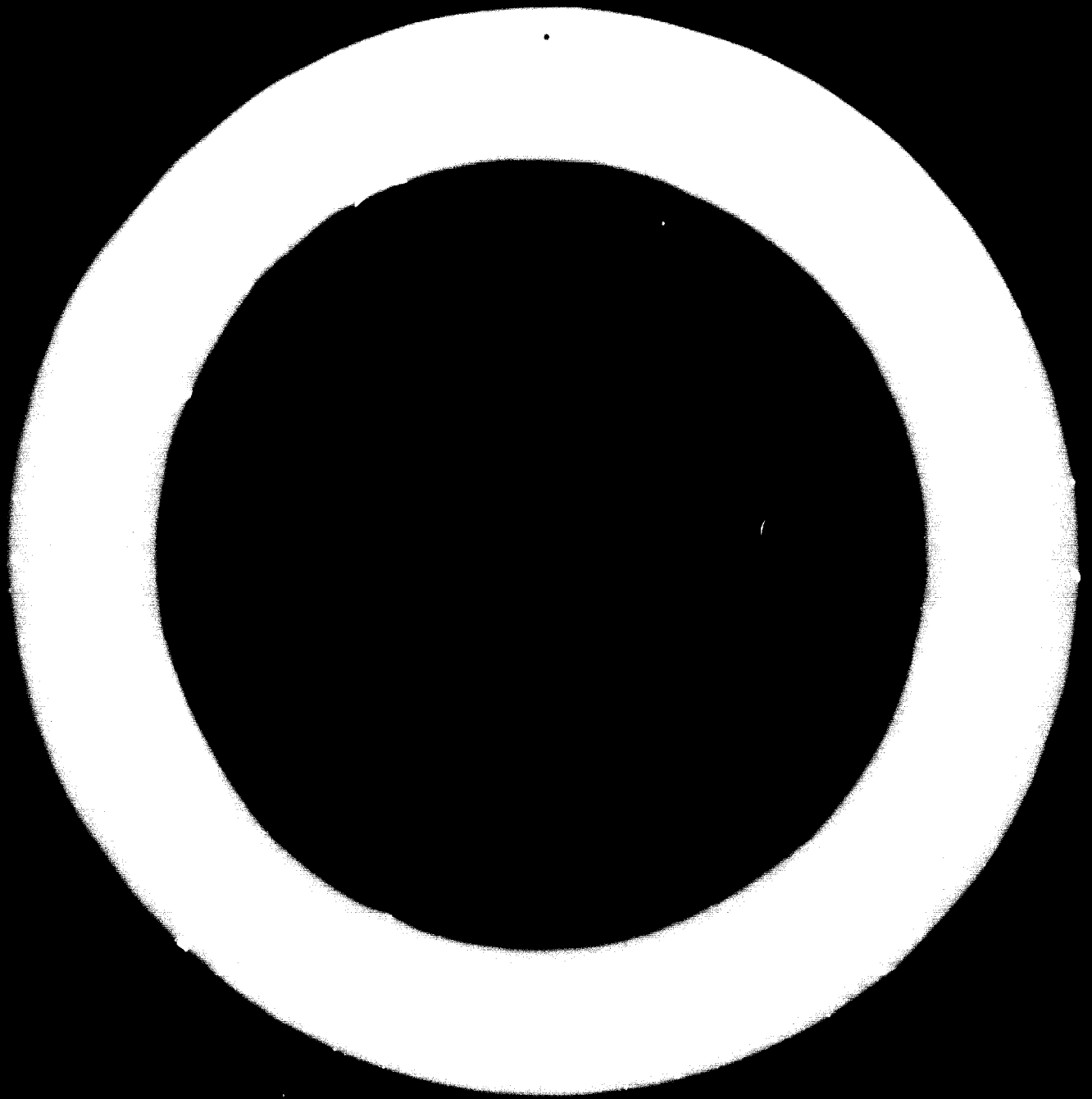
According to Forest Department figures, the yield from the conversion of radiata pine - the only local soft wood used in joinery - is approximately 50%. The waste and off-cuts are disposed of as firewood, and as the logs are of small diameter, this waste offers no appreciable commercial recovery.

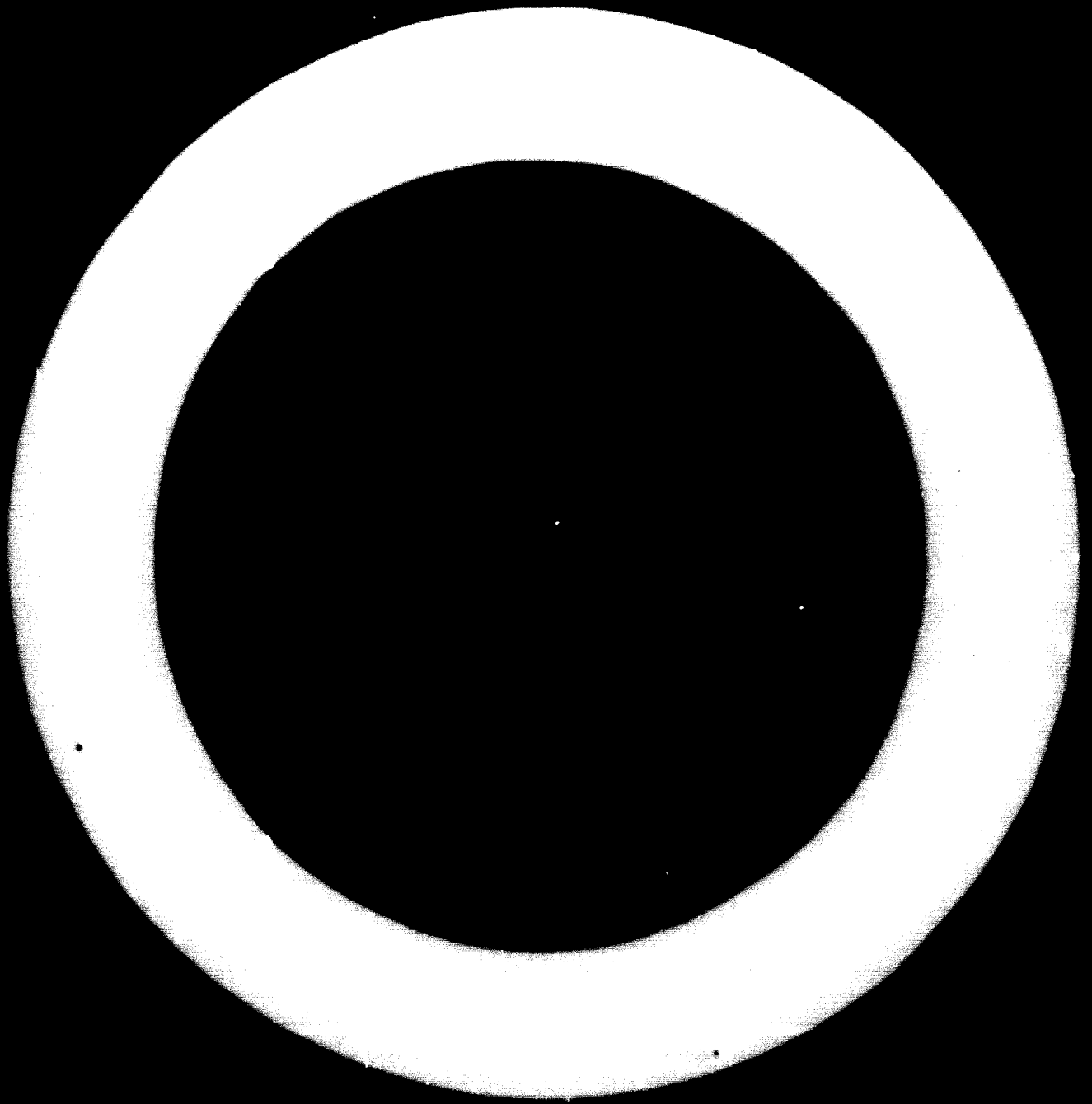
The yield from sawn imported hardwood used by the trade is about 70-80%, with no appreciable recovery of wastes.

4. COST BREAKDOWN

Examples:- One dining chair, contemporary style.

Assumed selling price	<u>Rs 55.-</u>
(i) Raw material	Rs 45.-
(ii) Labour assembly, polishing, administration costs etc	Rs 17.-
(iii) Power, manual operation of machinery	Rs 8.-
Cost	<u>Rs 70.-</u>





Its History

With 720 square miles of land area and a population of 850,000 people Mauritius, located 500 miles East of Madagascar, has a long tradition in furniture making, dating as far back as the "Compagnie des Indes" which was administering the island on behalf of France in the early 18th Century. The furniture pieces manufactured then are still treasured in many Mauritian homes and elsewhere for both their historical interest and their great value.

It is appropriate to note that the furniture pieces made in those early days were of original local design which came to be known as the "Compagnie des Indes" style. The woods used were mostly the indigenous hard wood such as ebony and macaque supplemented by some imported hard woods e.g. rosewood from the French "comptoirs" of India.

The exquisite craftsmanship of this era which has been handed down from generation to generation, coupled with modern technology, should stand Mauritius in good stead in the development of its furniture and joinery trade.

The Present Day Industry

The Mauritius furniture industry of today consists of some 300 workshops employing about 1000 craftsmen which produce approximately Rs 3 m worth of furniture articles and joinery parts, of which about RS 250,000 is exported to restrictive markets in Reunion Island, South Africa, the United Kingdom and France.

A complete and diversified range of furniture comprising wooden, rattan and metal items, is produced by a traditionally skilled work force.

The introduction of basic woodworking machinery after World War II has brought some modernisation and innovative technology to the trade. As most items manufactured are usually one of a kind or in small batches, production is not on a scale basis. The emphasis is quality.

Some examples of the varied range of furniture produced are:-

- (a) Period furniture and reproductions of antiques, including the "Compagnie des Indes" style,
- (b) Contemporary, including Scandinavian styles,
- (c) the popular functional range which includes all of the

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low-cost types, (d) Metal furniture, both high grade and low-cost, (e) Rattan furniture of top quality (f) Country style Mauritian design furniture executed solely in Mauritian woods with rush weave for seats - wholly hand-made and generally sold with no finish applied. Most of the above furniture is manufactured from solid woods.

With the admission of Mauritius to the Yaounde II convention and the implications for our export markets in the EEC, the market for the above range of furniture will be considerably expanded.

There is only one modern sawmill on the island. It is unfortunate that this saw-mill is of no great help to the furniture industry at large since it only processes softwoods in limited quantities. The joinery trade is partly served by the mill but the bulk of the timber requirements for the furniture industry must be imported in sawn condition, with very limited reconversion facilities available locally.

With the lower cost of timber in log form, it would be advantageous for the industry to have its own saw-milling and reconversion facilities.

It is obvious that the industry has resisted competition from imported furniture with increasing success. Most local furniture and joinery requirements are supplied by the home industry.

Mauritian furniture is of variable quality as in most countries. The best is excellent but the average standard is fair, especially in the finish. The category of the furniture goods moving in the export market however is comparable to the best produced, having also the advantage of the professional interest of the manufacturer in every unit.

From the appendix it is clear that there is a constant increase in Mauritian furniture export. It is also interesting to note that the furniture imports have declined.

Appreciation of Mauritian furniture during the last few International Trade fairs, shows that Mauritian furniture industry is in a good position in the international market, both in quality and price. Moreover, efforts are being made to promote our industry, especially in the selective markets, where the comparative advantages of production costs and craftsmanship enable the industry to be competitive as well as quality conscious.

Its Future Development

With a 3% a year population growth, the accelerated industrial development sponsored by the Government 4-year development programme and the inevitable increase in the standard of living, the pressure on the furniture and joinery trades to further expand will be inevitable.

We should at the same time not lose sight of the desirability of continuing to further expand our export markets in order to profit from the high quality of the traditional workmanship already available and also latent. This high skill can be developed by proper training to provide a qualified work force for home industries. The training of new workers is a continuing obligation of each furniture factory. At present it is done mostly on an apprentice basis. Patience and time are the keynotes. Fortunately these are part of the tempo of Mauritius. However, it will be essential to benefit from outside training programmes for the rate of growth envisaged should not be delayed by a lack of skilled craftsmen.

The central position of Mauritius in the Indian Ocean, with 3/4 of the world population and again 3/4 of the world natural resources in the neighbouring continents of Africa, Asia and Australia, is a real golden opportunity for the processing industry in this country.

The furniture industry is one which can be boosted easily because of our long tradition in this craft. The type and styles could be different from European mass-produced furniture.

Assistance Required

From the foregoing analysis and forecast, it is evident that the industry as a whole should be strongly supported both financially and technically by relevant organisations for the full utilization of the abundant and potentially craft-minded work force. Some of the requirements for advancement are, in our opinion:-

- (a) Training facilities to be made more widely available to apprentices with particular stress on workshop practice and all courses to be in the local Creole language.

- (b) Freely available medium and long-term loans at low rates of interest.
- (c) Reduction of customs duty on furniture raw materials, most of which are imported.
- (d) Drawback facilities to be simplified and refund made faster.
- (e) Reduced freight rates to be made available through Government assistance and the institution of a National Shipping Corporation with Government participation.
- (f) Persuasion of smaller manufacturers to stick to certain production standards.
- (g) Technical assistance regarding the establishment of a centralized structure to serve the furniture industry both to buy its raw materials under bulk purchase arrangements and to assist in export marketing. One model of interest is the Japanese "Shosha" style export organization described in the appendix. Mauritius would appreciate receiving from UNIDO expert counselling on the most suitable structure.

Conclusion

We hope, in this concise paper, that we have presented a clear picture of the furniture industry in Mauritius and that we have focused attention on some of the main aspects of the furniture and joinery industries in our country. We look forward to participation in this Seminar and believe it will enhance our knowledge of our industry so that we can help re-organize and orientate it towards the expanding development in our country in which the industry must make its best contribution.

A P P E N D I X

1. The Shosha system of Japan:

The Big Shosha handle about half of Japan's exports and more than 60 % of her imports. The transactions also include domestic whole-sale merchandising, distribution, and other multiple commercial and industrial activities.

The Shosha also exports goods for its own account from Japan to foreign countries. This allows their clients overseas to collect goods from stock without any difficulties, and in many cases with long-term credit facilities.

2. Export and import of furniture.

Statistical data from Annual Report of Customs and Excise Department 1969.

<u>Year</u>	<u>Wooden Furniture</u>		<u>Metal Furniture</u>	
	<u>Import CIF</u>	<u>Export FOB</u>	<u>Import CIF</u>	<u>Export FOB</u>
1968	Rs 103,899	Rs 72,362	Rs 607,161	Rs 1,000
1969	Rs 127,574	Rs 202,701	Rs 164,839	Rs 34,200

Current rate of exchange Rs 13.50 = £ 1.00





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