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THE FURNITURE AND JOINERY INDUSTRIES IN KENYA ✓

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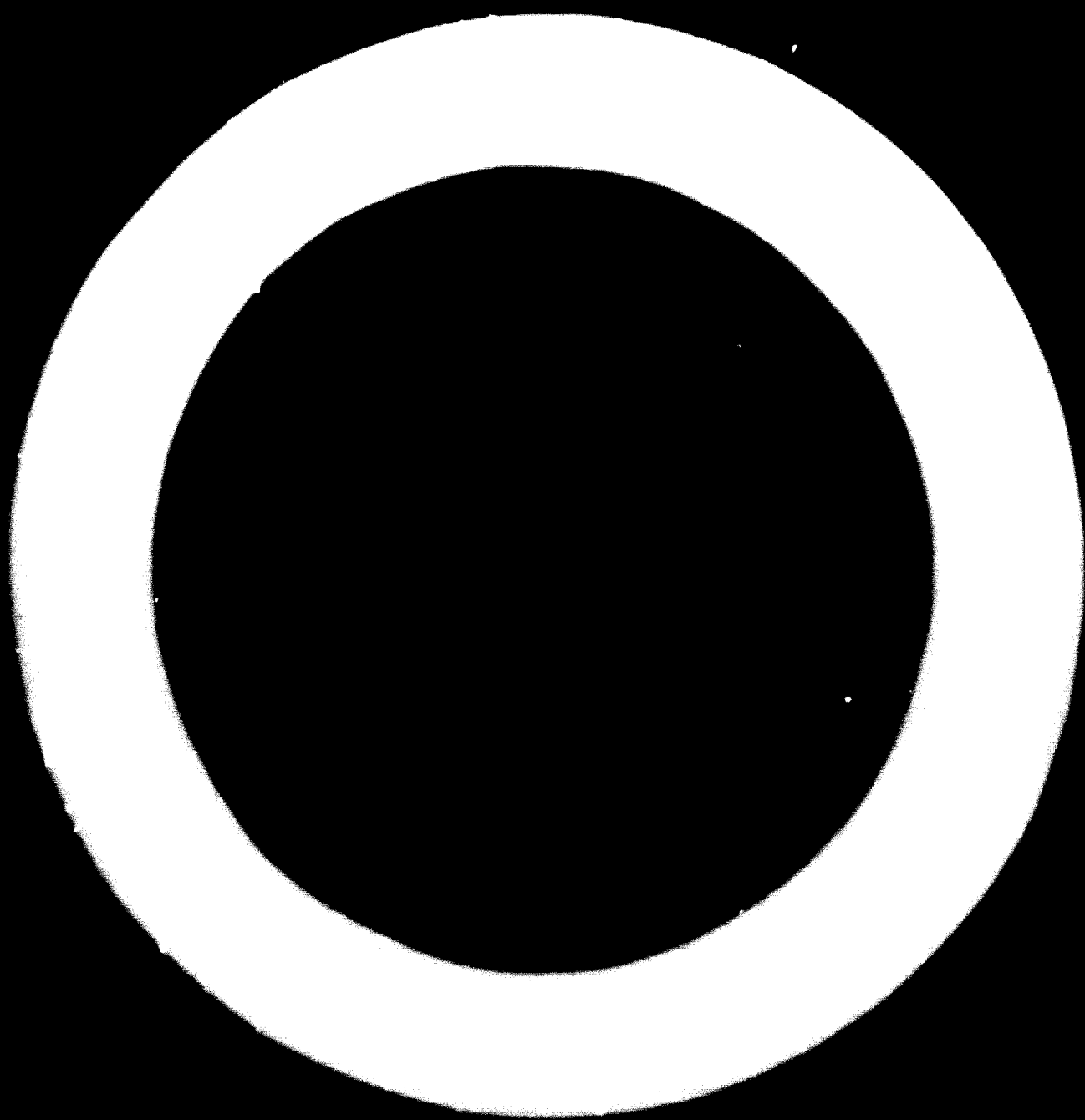
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INTRODUCTION

Kenya is situated astride the Equator but enjoys a climate that in the main is not too hot and at times can be cold. The mean maximum temperature ranges from 20° to 25° centigrade in the coastal areas and 18° to 23° in the up-country. The mean maximum temperature in Nairobi (capital) from 1963 to 1970 was 28.7° , while the mean minimum temperature was 9.1° centigrade.

The population of Kenya in 1970 was 10,892,000. The population increase is estimated to be 3 per cent per annum. The two largest towns are Nairobi (pop. 902,000) and Mombasa (pop. 270,000). Other urban areas amount to 337,000 population and the balance is in the rural areas.

Industrial production in Kenya in real terms rose by 13.2% in 1971, a rate of growth well ahead of both the 8.1% achieved in 1970 and the growth target for two sectors in the current development plan of 8.4%. During the period 1963 - 1970 the rate of growth of industrial output has been approximately 12.7%. The total growth in industrial employment has been about 6.2% and that of labour productivity has been 6.5%.

Furniture-making industry

This is one of the very fast growing forest-based industries despite the fact that over 90% of the sawn timber consumed in Kenya goes to the building and construction sector. It is estimated that 9 - 11% is absorbed in the furniture-making industry. Plywood is mainly used in the furniture and building industries.

The very fast growth in the furniture-making industry has been due mainly to high levels of building activity and because of certain types of office furniture which used to be imported are now manufactured domestically. For instance, in 1970 we had five major firms making all types of metal furniture and over ten firms specializing in the making of office furniture.

The quantity index manufacturing production in Kenya gives the following picture.

TABLE I

(1969=100)

| I.S.I.C DESCRIPTION CODE | 1964 | 1965 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971 | % change 1971 - 1970. |
|--------------------------------|------|------|------|------|------|-------|-------|-------|-----------------------------|
| 259 wood products | 51.3 | 76.5 | 61.0 | 79.4 | 74.7 | 100.0 | 102.5 | 112.6 | 9.9 |
| 260 furniture and fixtures | 70.8 | 66.7 | 64.2 | 66.7 | 66.7 | 100.0 | 112.5 | 158.4 | 40.8 |

TABLE 2 No. of industries and No. of employees.

| Year | No. of Firms [*] | No. of employees ^{**} |
|------|---------------------------|--------------------------------|
| 1966 | 251 | 8,797 |
| 1967 | 276 | 7,405 |
| 1968 | 241 | 6,874 |
| 1969 | 249 | 7,220 |
| 1970 | 247 | 7,398 |
| 1971 | 287 | 8,599 |

* Refers only to those firms that have responded to the annual Labour Enumeration Surveys.

** The size of firms and employees exclude Kenya Government employees paid through the computer.

Productivity by employee per annum in the furniture-making industry is rather low because of the fact that many firms are conservative in their production methods (i.e. they tend to use obsolete machines and methods) and the fact that the furniture making industry is not very mechanized in approach. This could be attributed to the fact that over 75% of furniture-making firms employ less than 50 employees. However, labour productivity in this industry has nearly doubled in five years.

TABLE 3 Manpower Productivity 1966-1971

| OUTPUT IN K/1000 | 1966 | 1967 | 1968 | 1969 | 1970 | 1971* |
|--|---------|---------|---------|---------|---------|---------|
| | 2,732.2 | 3,322.2 | 2,853.2 | 4,487.2 | 4,417.2 | 4,712.2 |
| No. of empl. | 8,797 | 7,405 | 6,874 | 7,220 | 7,398 | 8,599 |
| Productivity by employee per annum | 310.5 | 313.6 | 560.5 | 621.6 | 601.1 | 548.0 |

Estimate

Availability of raw materials

One of the objectives of Kenya's forest policy is to ensure that future wood requirements be met from domestic forests rather than from imports. To this end Kenya has several forest development programmes geared to achieve this objective in future.

In Kenya it is estimated that the existing forests can sustain a harvesting rate of 18 million cu.ft. of timber per annum, while the current rate is only 8 million cu.ft. However, the development of forest-based industries (i.e. sawn timber, pulp and paper, plywood, fibreboard furniture and fixtures etc.) will require harvesting rates by 1980 of more than double the present rates. It is therefore planned to establish new soft wood forest covering an area of 345,800 acres and pulp forest covering an area of 49,400 acres. If these programmes materialize there is no doubt that by 1980 Kenya will have sufficient forests to sustain her forest based industries.

Timber available for utilization

1. Forest land

| | | |
|--------------------------|-------------------|-------|
| Total land area in Kenya | 219,788 sq. miles | 100% |
| Total forest reserve | 6,492 sq. miles | 2.95% |
| Total productive forest | 1,547 sq. miles | 0.71% |

2. Indigenous Timber

| | |
|--------------------------|-------------------|
| Total volume | 3,700,000,000 CF. |
| Total utilization volume | 800,000,000 CF. |
| Less defects | 5% |
| Total available volume | 400,000,000 CF. |
| Present cut | 3,000,000 CF. |
| Future supply | 135 years |

3. Species

| | |
|-----------|--------------------|
| Podo | 117,000,000 |
| Cedar | 89,000,000 |
| Musharagi | 20,000,000 |
| Camphor | 12,000,000 |
| Gueri | 8,000,000 |
| Other | 154,000,000 |
| TOTAL | <u>400,000,000</u> |

4. Exotic softwood

- plantation started about 1970
- by 1970 approximately 250,000 acres of plantations
- main species (i) pine (ii) cypress
- target 350,000 acres
- present exotic cut is approximately 5 million CF.

5. Exports

The furniture making industry in Kenya produces mainly for the local market for obvious reasons.

- the nature of the finished product;
(i) it is delicate to transport and (ii) the finished product is also bulky, thus it is relatively cheaper to transport timber than furniture;
- furniture is a demand-located product.

Nonetheless, Kenya's furniture industry exports considerable amounts to neighbouring East African countries, notably Uganda, Tanzania, Rwanda, Zambia and Somalia.

Table 4 total exports of furniture 1967 - 1971

| Year | Exports outside E.A. | Transfers to Uganda and Tanzania | Total exports | Value in '000 Sales within Kenya |
|------|----------------------|----------------------------------|---------------|-------------------------------------|
|------|----------------------|----------------------------------|---------------|-------------------------------------|

Table 5 Exports of furniture 1971

| Country of destination | Value KSHS. '000 | % of total |
|------------------------|------------------|--------------|
| 1. Uganda | 11,597 | 79.2 |
| 2. Tanzania | 1,939 | 13.2 |
| 3. Burundi | 105) | |
| 4. Zaire | 3) | |
| 5. Ethiopia | 38) | |
| 6. Rwanda | 320) | |
| 7. Seychelles | 191) | 7.8 |
| 8. Somalia | 55) | |
| 9. Zambia | 89) | |
| 10. Malawi | 10) | |
| 11. Other | 335) | |
| TOTAL | 14,682 | 100.0 |

Future prospects

In order to intensify the furniture industry in Kenya it will be necessary to take the following measures:-

1. Provide the necessary technical assistance in order to achieve the desired standard for export;
2. Introduce technical schools and colleges which should provide qualified technicians;
3. Increase the production of low-cost items preferably using the softwoods and hardwoods available in the country;
4. Reduce as far as possible importation of timber for furniture;
5. Expand the existing furniture industries and introduce others by offering financial assistance;
6. Improve the quality of manufactured items;
7. Modify the methods of furniture assembly to facilitate transportation for export purposes;

8. Survey and improve the quality of raw materials by grading and seasoning in order to have the desired standard of furniture;
9. Establish a quality control for exported products.





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