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THE FURNITURE INDUSTRY IN KENYA 1/

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INTRODUCTION

Kenya is situated between 30° - 40° E and extends about 5° north and south of the Equator. It borders Ethiopia in the north, Somalia in the east, Indian Ocean in the south-east, Tanzania in the south, Uganda in the west and Sudan in the north-west. It spans over an area of 582,647 sq. kilometres of which an area of 13,395 sq. kilometres is covered by water. The mean maximum temperature ranges from 20° to 32.8° centigrade in the coastal areas, and 6.8° to 26.8° up-country. The highest land mark in Kenya is Mt. Kenya which is 5,193 metres high.

The population of Kenya in 1971 was approximately 11,694 million. The population increase is estimated to be 3.3 per cent per annum. The two largest towns are Nairobi (population 502,000) and Mombasa (population 270,000). Other urban areas have a population of 337,000 and the rest is in rural areas.

Kenya is still essentially an agricultural country with over 30% of the total Gross Domestic Product at current prices in 1972 coming from this sector. However, the industrial sector is gradually gaining prominence. In 1972 this sector's contribution to Monetary Gross Domestic Product at current prices amounted to nearly 20% despite the fact that growth of industrial production in real terms was held back because of import controls leading to shortages in raw materials and the decline in the value of exports to Uganda.

FURNITURE MAKING INDUSTRY

The furniture making industry is one of the few industries which showed substantial growth in production in 1972 at a time when the country imposed several controls on imports. This was possible because the furniture making industry relies to a great extent on local raw materials.

The quantity index of industrial production presented in part below (Table 1) shows that the production of furniture and fixtures increased by 34.4% - the highest growth recorded in industrial production in 1972.

Table 1 (1969 = 100)

I.S.I.C Description Code	1965	1966	1967	1968	1970	1971	1972	% Change 1971-72
25 Wood Products	76.5	61.0	79.4	74.7	102.5	98.6	102.5	4.0
280 Furniture and Fixtures	66.7	54.2	66.7	66.7	112.5	133.3	179.2	34.4
Total Wood Products and Furniture	72.4	58.1	74.1	71.4	106.7	113.1	134.7	19.0

Table 2 No. of Industries and No. of Employees

Year	No. of Establishments ⁺	No. of Employees ⁺⁺	Earnings (KE '000)
1967	192	1,848	447.2
1968	170	2,193	565.0
1969	172	2,316	619.6
1970	343	2,240	627.8
1971	193	2,643	667.6
1972	133	2,749	661.8

+ Refers only to those firms which responded to the Central Bureau of Statistics Annual Labour Enumeration Surveys.

++ The size of establishments and employees exclude Kenya Government employees paid through the computer.

It is worth noting that productivity per employe is high and also that it is showing an upward trend in view of the fact that 7% of the furniture making firms are small in their organisation i.e. employ less than 50 employes. This therefore means that their production techniques are limited by the virtue of their sizes. However, there are about 10 firms which use modern techniques of furniture making.

	1967	1968	1969	1970	1971	1972
Output in Kf '000	3,062.6	3,563.1	4,090.0	4,222.7	4,781.1	4,883.3
No. of Employees	1,848.	2,193	2,316	2,248	2,643	2,749
Productivity per Employee	1,657.3	1,624.0	1,766.0	1,880.6	1,809.0	1,776.4

Probably, it is also worth noting that there are now two plywood factories and a third one is currently under construction and is expected to start production at the end of this year. In addition, arrangements are being made to build two more mills, one in the Transmara area and the other to the north-east of Mt. Kenya. There are also plans to build a fibre board mill. Foam is now being extensively used in the local manufacture of mattresses and pillows.

There are many varieties of furniture made in the country, the bulk being made of wood, but recently locally manufactured metal furniture has made a very favourable impression on the local market. Some of the products are now being exported to neighbouring countries. A whole range of metal furniture is now being manufactured locally including office furniture and equipment.

AVAILABILITY OF RAW MATERIALS

One of the objectives of Kenya's forest policy is to ensure that future wood requirements should be met from domestic forests rather than through importation. To this end Kenya has several forest development programmes geared to achieve this objective. One of these programmes is the rural afforestation scheme which was introduced two years ago with a view to inculcate forest values in the rural areas and to establish farm woodlots, shelter belts and soil protection forest on steep hills, and along river banks. It is hoped that this programme will go a long way towards increasing wood supplies for all rural requirements whether for fuel, building poles or timber.

Table 4 Forest Plantation Area, 1966 - 72 '000 Hectares

	1966	1967	1968	1969	1970	1971	1972*
Indigenous Softwoods	4.6	4.6	4.6	4.6	4.6	4.6	4.6
Indigenous Hardwoods	3.8	3.9	4.1	4.0	4.3	4.5	4.5
Exotic Softwoods							
Cypress	35.1	37.3	40.0	43.0	43.8	47.0	47.4
Pines	40.6	42.5	46.6	49.0	51.1	52.2	57.6
Exotic Hardwoods							
Timber	2.8	2.3	2.5	4.0	2.3	2.3	2.7
Fuel	6.5	6.0	7.0	7.0	9.8	9.3	12.0
Total Afforestation	93.4	96.6	104.8	111.6	115.3	119.9	128.8

* Provisional

Fire continues to be the only factor frustrating afforestation programmes, although in 1972 due to wet weather conditions loss of forest through fire was greatly reduced. In 1971, 14,500 hectares of natural and planted forest were destroyed by fire. It was estimated that the value of the timber lost was K£438,000. In 1972 only 100 hectares was lost.

Table 5 Sales of Forest Products, 1966 -72

	1966	1967	1968	1969	1970	1971	1972
Timber ('000 cu. m)							
Softwood	156	206	191	257	260	240	245
Hardwood	14	15	17	24	24	33	44
Total	170	221	208	281	284	213	289
Fuel ('000 Stacked cu. m.)							
Fuelwood	107	91	82	89	65	46	36
Charcoal	147	61	106	107	133	125	148
Power and Telegraph Poles	7,000	252	8,342	10,747	14,409	12,501	11,192

Sales of forest products are shown in Table 5. These rose a little in 1972, mainly due to rising domestic demand. However, exports of sawn timber during the year fell sharply after rising steadily for many years. The main reason was the drop in exports to the partner states. Also affected were exports of furniture to Uganda which fell drastically from K£0.6 million in 1971 to K£0.2 million.

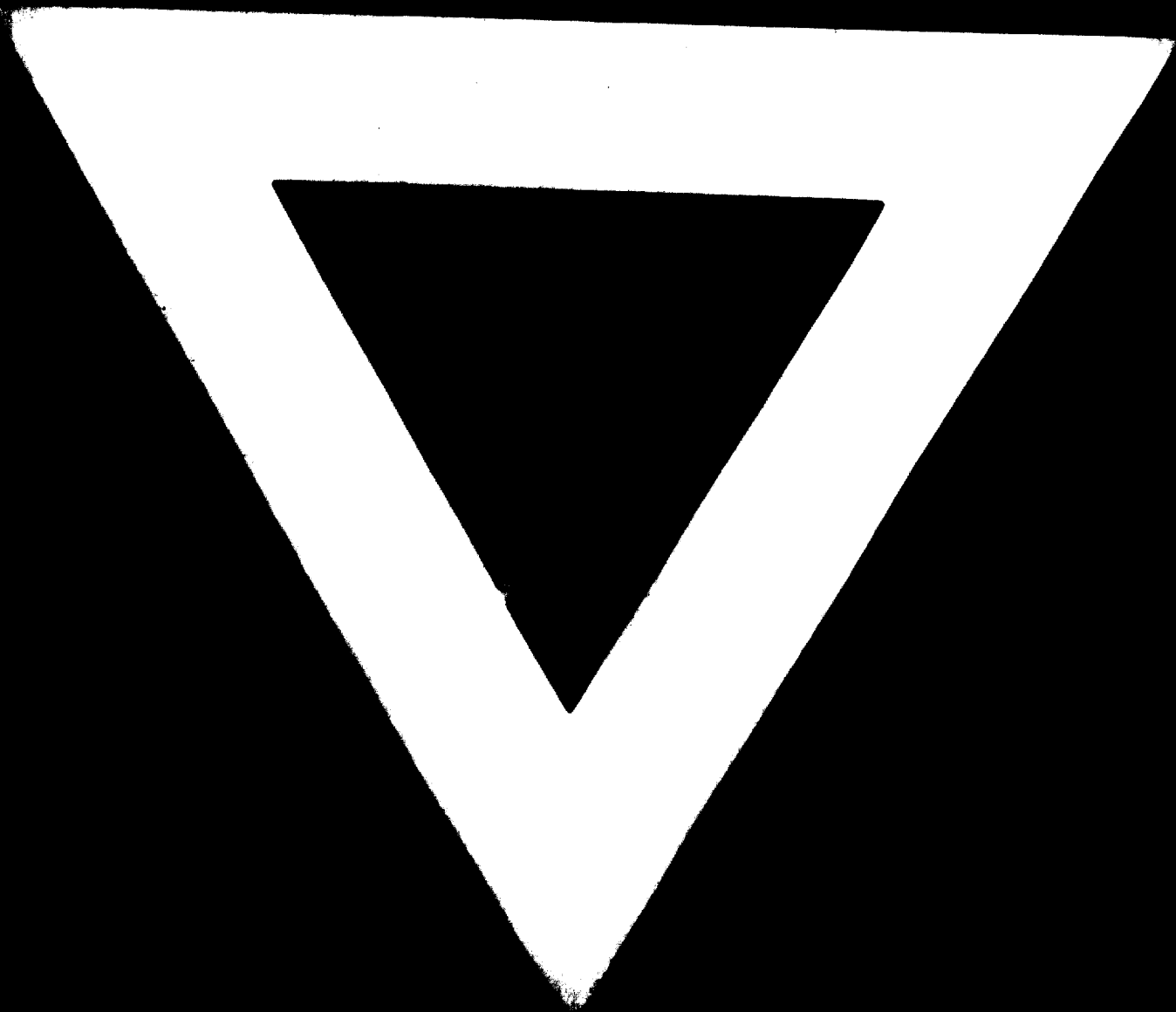
EXPORTS OF FURNITURE - 1972

Country of Destination	Value (KSHS '000)	% of Total
1. Uganda	3,057	51.67
2. Tanzania	749	12.65
3. Burundi	270	4.57
4. Rwanda	451	7.62
5. Seychelles	377	6.37
6. Others	<u>1,013</u>	<u>17.12</u>
Total	5,917	100.00

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 export standards.
2. Introduce technical schools and colleges which should provide qualified technicians.
3. Increase the production of low cost items preferably using the soft woods 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 standards desired for furniture.
9. Establish a quality control programme for exported products.



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