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STATUS OF THE FURNITURE AND JOINERY INDUSTRY ✓
IN SIERRA LEONE

by

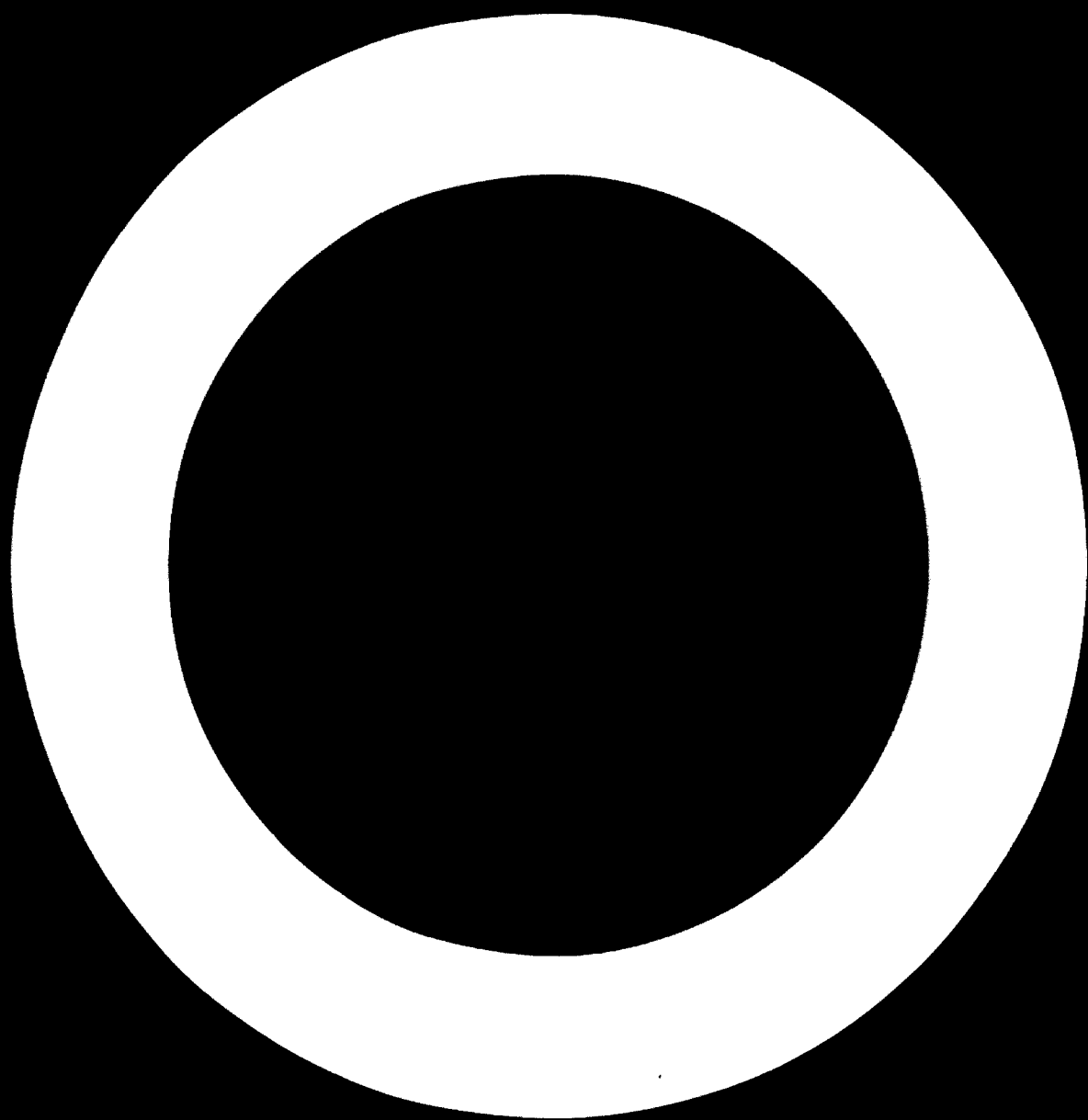
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1. CLIMATE:-

Sierra Leone is situated on the West Coast of Africa between latitudes 6° 55' and 10° North and longitude 10° 16' and 13° 8' West. It lies in the tropical rain forest belt with average shade temperature in the region of 76°F - 80°F (24°C - 27°C).

The relative humidity is quite high (some 80% in the shade). There are two clearly marked seasons - the rainy season lasting from May to October and the dry season which lasts from November to April. A dry wind (the Harmattan) blows from the North-East direction during December to February. This wind can be very desiccating and can affect the moisture content of wood causing wood to shrink appreciably. Apart from the Harmattan period, seasonal variation of temperature and humidity is not very marked.

2. PRESENT SITUATION OF THE FURNITURE AND JOINERY INDUSTRY:-

Sierra Leone, like other developing countries, has to undertake a lot of building projects to house its three million population in modern buildings to improve their health and living conditions. These buildings obviously have to be furnished. There is, therefore, a big demand for furniture for domestic consumption and, at present, the domestic production is inadequate to meet the present demand and is far from being adequate to meet the growing needs of the future. There is much room for expansion. At present, there is only one major institution producing good quality furniture in large quantities; that is, the State owned Forest Industries Corporation. A few Lebanese produce furniture of reasonable quality but on a smaller scale. There are a number of small wayside furniture and joinery manufacturers producing low grade utility furniture for the lower income group and the rural population.

The large State owned Forest Industries Corporation is fairly well equipped with a logging outfit of its own, a fairly modern sawmill capable of producing about 1,500 cu.ft. of timber in a one shift eight hour day. Its furniture and joinery production is about 1½ million dollars a year and it employs about 300 workers - some 200 in the furniture section and about 100 in the joinery section. Most of the furniture and joinery items produced in the country are consumed by the domestic market.

3. TIMBER:-

Sierra Leone for its size (71,000 sq. miles) is not very well served with forests. Most of the forest having been cleared for farming under the shifting cultivation system.

Of the total area of the country only 4% or 1,650 sq. miles is under productive forest, from which the country's requirements of timber and other forms of wood products is to be met. Because of this, the country has to follow a very cautious plan for the utilisation of its limited forest resources so that it can derive maximum benefit from it. Based on this consideration, the forest utilisation policy is directed towards processing the wood as far as possible within the country, rather than exporting logs for processing elsewhere.

The present production of timber in the country is inadequate to meet its needs but some special grade timber (about 30% of the total consumption) is still imported from other West African territories. Another reason for importation of timber is the inadequate supply of seasoned timber due to insufficient seasoning kilns. Only the Forest Industries Corporation has seasoning kilns and most of the seasoned timber produced is used by its own furniture and joinery factory, leaving very little or nothing for the other timber users.

The question of insufficient supply of timber, both seasoned and unseasoned is merely a financial problem, which can be solved by the installation of more sawmills and drying kilns.

4. OTHER MATERIALS - USES & AVAILABILITY:-

The furniture and joinery industry in this country uses a fair amount of various forms of wood based products such as particle board, plywood, chipboard, blockboard. These are all imported as there is no factory in the country producing any of these materials. There are proposals for the establishment of a new forest industries complex in the Tama/Tenkoli forest areas in the Northern Province and the expansion of the Forest Industries Corporation outfit in Kenema as a joint venture between the Sierra Leone Government and the Romanian Government which will produce plywood, blockboard and sliced veneer in addition to lumber. The proposal is still in the negotiating stage. All other materials used in the

manufacture of furniture such as glue, wood finishes, such as lacquers, thinners, stains, etc., and various forms of hardware furniture fittings, such as screws, casters, etc., are imported.

As can be seen, apart from the timber and labour which is produced locally, all the other needs for the manufacture of furniture and joinery items are imported, thereby causing the industry to be highly dependent on external factors and making the cost of the furniture very expensive on account of the very high cost of materials in the World Market. It is, therefore, difficult to adjust the production cost and consequently the selling price of the furniture and joinery produced in the country to suit the income of the consuming public. This makes it difficult for the average person to be able to afford good quality furniture because of the high price. This situation considerably restricts the size of the domestic market for furniture and joinery.

Unless and until quite a good number of the materials can be produced in the country at reasonable cost, the market for high quality furniture and joinery will be restricted to the opulent sector of the population. The lower income group, which forms the vast majority of the population, will have to be content with low grade furniture and joinery items produced by the small producers.

5. LABOUR:-

Labour availability is no problem as some 70% of the population is either unemployed or under-employed. The bulk of the under-employed people are peasant farmers practising subsistence agriculture. Skilled labour is rather scarce. Over the past 10 to 15 years, Technical Institutes and Trade Centres have been established where vocational training is provided up to the advanced apprentice level. In-service training is also provided in the workshop of the Forest Industries Corporation and the Ministry of Works. Higher technical training in this field is non-existent and personnel have to be trained abroad at very high expense and in situations different from home conditions.

6. FURNITURE AND JOINERY FACTORIES:-

As already mentioned, furniture and joinery factories worthy of being so called, are very few in the country. The largest and most equipped being the Forest Industries outfit. A few Lebanese run what could be called medium size factories producing custom made items. The rest of the furniture and joinery being produced by the small workshop already referred to above. Products design has much room for improvement if designers and timber engineers can be found. What is needed is original design conceived and produced to suit the special climatic and socio-economic conditions of the country. For the export market, it might be possible for the customers to submit their own designs for manufacture in the local factories.

The technical level of the furniture and joinery industry in general could be described as reasonable. The Forest Industries Corporation and the other medium size factories mentioned, employ highly skilled technicians at the top - mainly expatriates - but there are not enough skilled and experienced top level local personnel to back them up which situation puts considerable strain on the managers of such factories. There is, therefore, need for technical training and considerable exposure of qualified personnel to equip them for top level managerial positions.

Most of the factories are operated on the 'mechanised craftsman' system; i.e. mechanised production of the components and assembly by hand. The level of automation is therefore low. This is partly because of shortage of capital to invest in expensive automatic equipment in the assembly line and partly because of the abundance of cheap labour in the country with a high level of unemployment. This situation, though not in the best interest of the industry in terms of production level and cost, has to be accepted for the present, because of the social and economic reasons already mentioned. It could only be overcome when more job opportunities are created in other fields to absorb the labour force that will be displaced by a higher level of automation in the furniture industry. One possibility is the expansion of the primary forest industries, i.e. sawmilling which is more labour intensive.

Specific technological problems facing this industry could be put down as (a) absence of firms producing spare parts and tools for woodworking machinery, thus making the industry entirely dependent on outside sources of supply. This often leads to serious hold-ups in production, resulting in men and machines being under-utilised with adverse effect on the cost of the products; (b) the lack of research and knowledge of the usefulness of a number of potential species of timber growing in the forest which might be utilised by the industry; (c) the lack of information on preservative treatment that could be given to less durable species of wood; and (d) the lack of timber engineers already referred to.

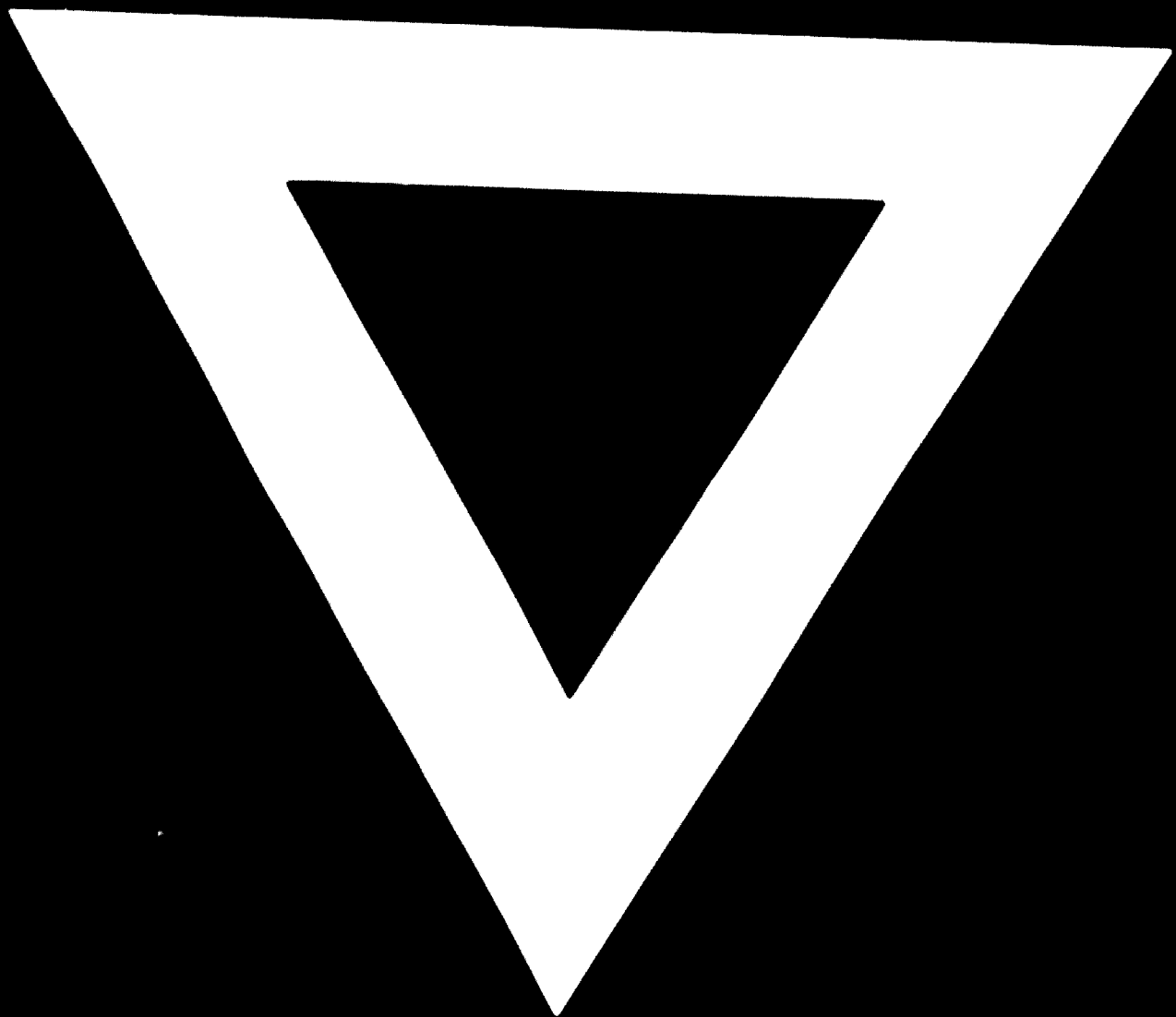
7. MARKETING:-

The home market, as already mentioned, though potentially large, cannot be fully utilised because of the high cost of the furniture. Distribution pattern in the home market is by retail trade through agents and by the manufacturers themselves. The export market has a great potential which can only be exploited when the industry has been organised to produce by more advanced methods, large quantities of identical components of good quality and at low cost to make them competitive. There is no shortage of raw material and trainable labour to make this possible. Here again the problem is shortage of capital and skilled personnel. It is, therefore, the case that when these financial and technological obstacles are overcome, there is a potentially good export market awaiting the products of the furniture and joinery industry of the country.

8. TRENDS:-

To overcome some of the problems and difficulties facing the industry mentioned above, the Forest Industries Corporation, which runs the largest of such factories has approached the UNDP for assistance in the provision of experts to design furniture and prefabricated houses, for experts in timber engineering and cost control, and also with the training of local personnel who will act as counterparts to relieve these experts at the end of their period of assignments. As already mentioned, the Sierra Leone Government is also at the moment negotiating with the Government of the People's Republic of Romania for a joint effort in the development of the primary and secondary forest industries.





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