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THE FURNITURE AND JOINERY INDUSTRIES OF TURKEY: CURRENT STATUS AND FUTURE PROSPECTS FOR DEVELOPMENT*

by

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The furniture industry in Turkey till the year 1970 was solely considered to be forest-based industry. From then on satisfactory attention was paid by the Government to the furniture industry and now this is continuing with a comprehensive national plan for development of this industry.

Nevertheless the Turkish wood-based industries including furniture and joinery industries, while not exactly flourishing, are continuing steadily and progressively.

Greater quantities of better quality home made furniture productions are coming on the market and manufacturers do not face serious domestic marketing problems. Though it was planned that exports of furniture would be the double of their present rate, they rose by some 3 per cent in the last five years. The main markets were the Middle-Eastern countries.

Over the years there has been a discouraging increase in selling prices, as in all other sectors, with most manufacturers looking for further increases during this and the coming year. The furniture industry itself cannot be extracted from the other industries and from that point of view though the economic recovery predicted for the end of period 1972 - 1977 has not matured it can be said that currently the Turkey is facing many problems on this front including inflation, factors that are repeated elsewhere in the world.

Regarding the raw material for furniture industry in Turkey, no significant deficiency has appeared so far, and there does not seem to be any in the near future. The country is rich in tree species and 98 per cent of the forest areas are in the state property so that the harvesting and the consumption of its products are well organized and well distributed between the related sectors. Hardwood, which is the traditional raw material of this industry, seems to lose its importance in comparison with the softwood: beech (Fagus orientalis), oak (quercus sessiliflora, quercus pedunculata, etc.) lime tree (tilia spp.) maple (acer spp.) and birch are the most popular tree species used by the furniture industry. Very recently the manufacturers seem to use softwood in large quantities and they name it "Scandinavian style".

Furniture manufacturers in addition to building and construction industries remain the largest consumers of particle board, taking around 55 per cent of the total production. On the other hand it can be said that the particle board and furniture industries grow parallel to each other in Turkey. Regarding the particle board, which is going to be the basic raw material of furniture industry in the future, there is still a shortage on the domestic market. Wood-based panels - particle board, plywood, blockboard, fibreboard, decorative veneer and laminated board - are manufactured in two state owned plants and 30 privately owned plants. It is expected that the annual production of wood-based panels will increase at a faster rate than that of sawnwood production. Sawnwood residues will increasingly be used in the production of particle board, fibreboard and pulp. Thanks to the present level of technology, by-products of sawmills are being put to wider use in board manufacturing. On the other hand by means of high speed sawmills it is now possible to utilize small diameter pole size logs for sawing into lumber as well as pulp and paper production. Deciduous species are, and will be, used in plywood, conventional lumber and particle board manufacturing. It is recommended that, in order to obtain maximum economic benefit from our forest resources, further industrial use of these by-products should be implemented through integrated manufacturing schemes. The particle board production in 1976 could not reach the planned target and remained around 550 000 m^3/year. Nevertheless the industry is going ahead with new plants and extensions and seven new particle board lines are expected to start up by the end of 1977. The economic situation has had no effect on particle board sales, and this encouraged the particle board manufacturers.

Fibreboard showed a very similar pattern to that for particle board in 1976. There was an increase of almost 10 per cent in the consumption of fibreboard during the year with demand from the furniture manufacturers and particularly from the building industry which were not expected by fibreboard manufacturers.

Regarding the plywood as a raw material in furniture industry such a similar pattern did not appear. Domestic production does not satisfy the market and Turkey still has a massive import bill for plywood and plywood products. In addition to that, no new lines are expected to start up in the near future. Demand projections undertaken by the State Planning Organization of Turkey indicate that the most critical national shortages in the short run will be for plywood. The solution of this problem relies on government policy and harvesting methods of deciduous species.

Wood-based prefabricated housing construction is still at a very low level. The country frequently faces earthquakes. The Government took measures by approving several proposals for the development of building materials industries and many grants were given to develop this sector. These new grants are expected to restore confidence in the housing industry and provide a durable basis for the operation of the industry many years to come. In addition to the granting of the grants the Government itself constructed a particle board plant in order to supply the prefabricated housing industry. This plant, of which I am the manager, consists of two OKAL (extruded particle board) lines with a 30 m^3/day capacity and has been producing for ten months. Mainly tubular particle boards in addition to solid particle boards with thicknesses up to 60 mm are produced in the plant. 70 per cent of the production are subsequently veneered or laminated with fibreboard. The demand comes mainly from building industry, schools, hospitals, administration buildings, assembly halls, etc. and the boards are increasingly used in conventional construction for doors and partitions, wall and ceiling panels, shop fittings, furniture, etc. Parallel to the existing lines, two new lines with the same capacity have been planned, and feasibility studies have been already completed. Next to it a furniture and prefabricated house plant is going to be constructed in the near future.

Regarding the other raw materials used in furniture and joinery industries such as veneer, blockboard, blue, etc. there are no particular shortages

From the viewpoint of technical problems, many of them have been solved in recent years. But there remain many still to be overcome. 80 per cent of the furniture is being produced in small shops. These are not economic units and use labour intensive techniques. This is partly the result of previous government policies. The country's population increment is rather high, around 3 per cent and this high percentage forces us to follow the same labour intensive policy in such workshops. Nevertheless, in addition to three existing large furniture [illegible]nts (ELKA, TEPE, HITIT) two new plants, (TAMSAN, YENI KONTROPLAK [illegible]BILYA ANONIM SKT) are going to start up in a couple of months. [illegible]ast plants are well integrated indeed and are planning to double [illegible] capacity in the near future. The machinery of these integrated [illegible]ure plants is being imported from the developed European countries, [illegible], from the Federal Republic of Germany and Sweden, and the most modern techniques of these industries will be used.

Low-cost automation, production management and packing of the production for export seem to be the main problems of this industry in the future. Economic indicators are pointing out that there won't be great difficulties in exporting the furniture productions particularly to Middle Eastern countries. The Middle East became a significant purchaser of furniture products from Turkey as well as Europe, and Turkey will undoubtedly fully use its geographical advantages.

The last five years period (1972 - 1977) was a turning point in Turkey. We are looking for unending upward movement in demand and are happy with the much improved levels of the last five years and are hopeful that at least these levels will be maintained.

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