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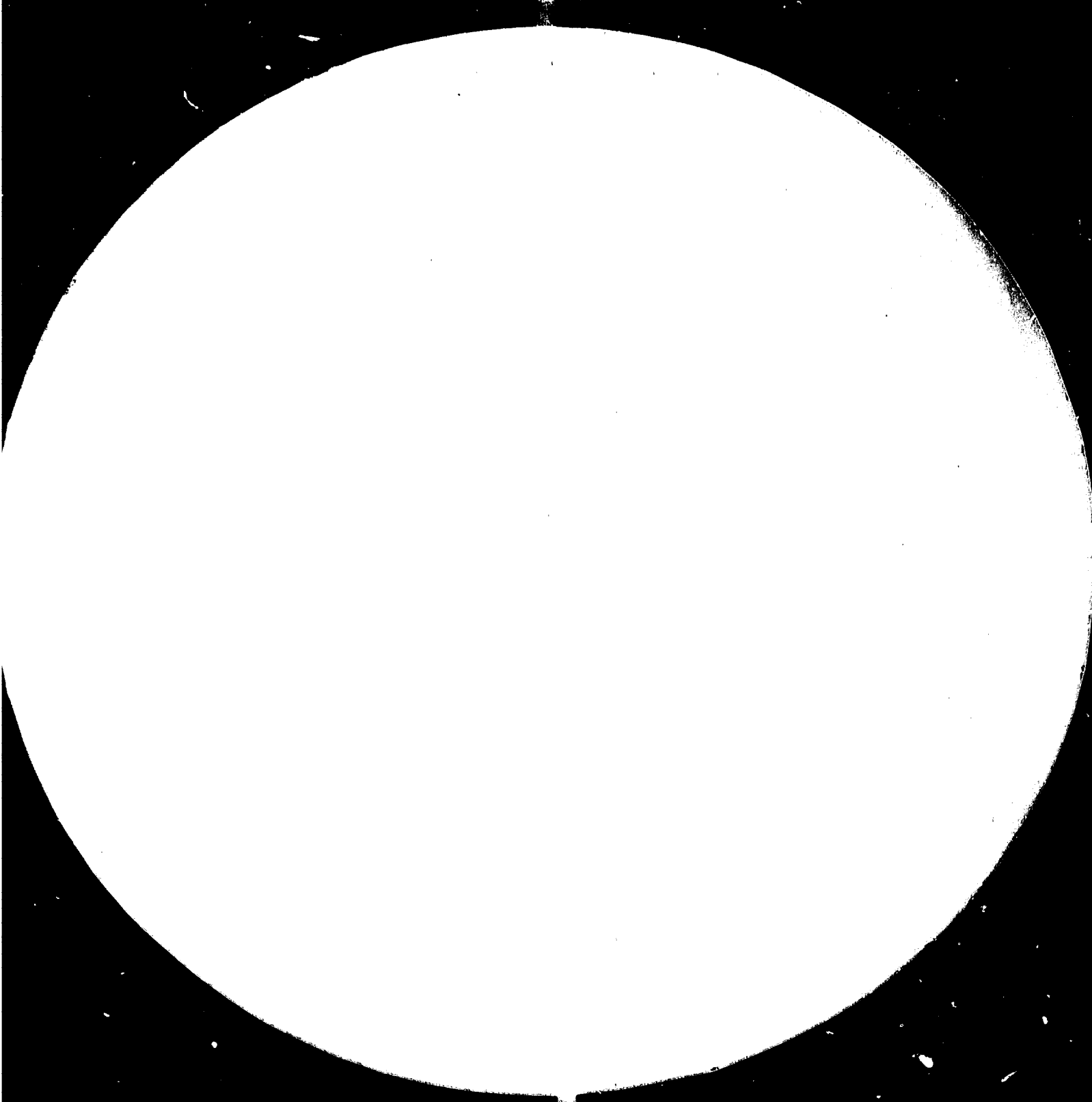
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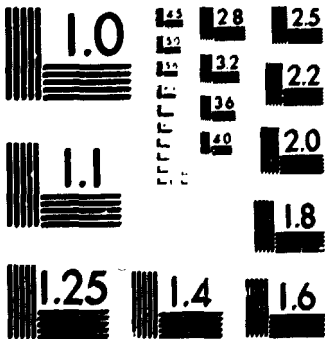
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**THE STATUS OF THE FURNITURE INDUSTRY IN JAMAICA\***

by

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### Introduction

Jamaica is the largest of the English speaking Caribbean countries. It is situated about 90 miles south of Cuba or about 500 miles south of Miami, U.S.A.

It has an area of approximately 4,440 square miles (11,500 km<sup>2</sup>) and a population of 2.2 million. The climate is typically tropical, the temperature ranges from about 20 to 33 degrees C depending on the time of year or the part of the country.

### 2. Raw Material Situation

A variety of raw materials are utilized in the manufacturing of furniture. In wooden furniture, the chief raw material used is South American mahogany which is imported, but Jamaican hardwoods such as cedar, mahoe and guango are also used. For wicker furniture the raw materials are all local, both the lumber for the frames and the wisp for the weaving. In upholstered furniture the lumber for the frames is local but the fabric, spring and foam are imported. The lumber and bagasse board which are used for household fixtures are local also the lumber which is used for doors in conjunction with the plywood which is imported. All the associated materials such as adhesives, finishes and hardware are imported.

The availability of the above-mentioned raw materials will depend largely on whether they can be obtained locally or have to be imported. Jamaica like many other developing countries is faced with a shortage of foreign exchange, due to the world economic crisis and the rise in oil prices. This shortage of foreign exchange has resulted in the unavailability or limited supply of raw materials which have to be imported. This has severely limited activities within the furniture and joinery industries, and has resulted in the closing down of more than one large furniture industry. It has also forced Jamaican manufacturers to come up with alternate designs which can be

constructed without the use of some of these imported raw materials. Even where the raw materials are available locally, the industry is faced with other problems, such as the transportation of the logs from the mountains to the saw mills, inadequate kiln drying facilities, lack of a proper grading system and a lack of technical personnel.

Efforts are presently being made to overcome these problems by means of:

- (a) Encouraging manufacturers to utilize more indigenous raw material, and to increase the amount of furniture produced for export.
- (b) Providing technical assistance for the forestry and furniture industries.
- (c) Providing training for workers in the furniture industry.

### 3. Structure of the Industry

The types of furniture and joinery factories in Jamaica vary from the "one man bench" to the large well equipped factory. The types of factories can be divided into three main groups.

- (a) **Large Factories:** These numbered about twenty companies with relatively high standards of operations and have the capabilities to produce for export. The average plant and warehouse area of these factories is about 45,000 square feet (about 4200 m<sup>2</sup>). Employment levels in these firms vary from 30 to 250 persons in 1977, but they have the potential to employ from 150 to 1,000 persons. Most of them have sophisticated machines and equipment, and some of the factories are designed to produce for mass production.
- (b) **Medium Size Factories:** An estimated one hundred or more firms, producing to less rigorous standards. These have less working area than the bigger firms. In 1977 they employed between 10 and 30 persons each, but some of them have the potential to employ up to 100 persons. These firms cater

predominantly to the domestic market. They have all the basic woodworking machines and equipment, but basically are not set up for mass production.

- (c) **Small Factories:** Approximately 1,000 or more businesses operating on a small scale, mainly as unregistered proprietorships. The amount of space utilized by these firms is relatively small and the number of persons employed is usually between one and ten. Hand tools are widely used in these factories.

All of the large and a number of the medium and small factories are located in the city of Kingston, the capital of the country and the others are scattered throughout the country but mainly in the rural towns.

Due to the nature of the furniture and joinery industries in Jamaica, it can employ unskilled, semi-skilled and skilled workers. There is no shortage of unskilled and semi-skilled workers but there is a shortage of skilled and managerial personnel especially persons who possess both managerial and technical skills.

The lack of such skills tends to affect Jamaica's ability to make a permanent stamp on the export market. Because Jamaica is not a traditional exporter of furniture, manufacturers were in the past content to service the domestic market with some export to the Caribbean area. However with the decline of the domestic market, furniture manufacturers had to look to the export market. However entry into the export market has been retarded because of the following reasons:

- (a) Failure to effectively utilize the identified North American - USA and Canadian - markets,
- (b) The quality of furniture and inefficient manufacturing techniques.

Despite the problems besetting the furniture industry, exports have been increasing over the years. The Caribbean region received

most of the furniture during the period 1974-78, these exports increased by 318 per cent over the figures of 1974. The export of furniture to the U.S.A. and Canada has been increasing steadily since 1974. In 1974, 272 units were exported to the U.S.A. and in 1977 this figure increased to 22828 units (this includes both wicker and wooden furniture). Between 1974 and 1978 the total export of furniture in dollar value rose by over 600 per cent.

If this growth is to continue there are some problems which must be overcome such as:

- (a) The lack of skilled personnel
- (b) The lack of raw materials
- (c) Inconsistent quality of furniture
- (d) Late deliveries.

4. Design and Marketing

There is very little designing of furniture done in Jamaica, most manufacturing is done by copying designs. Presently most of the furniture for export is designed by the overseas customer for the local manufacturers. This trend will have to change if Jamaican manufacturers are going to make it into the export market and stay in there. Since it is important to utilize more local raw material, local designers must be available to produce designs to suit the available raw materials.

5. Industrial Infrastructure

There are two professional associations within the furniture industry, namely:

- (a) Jamaica Manufacturers Association - Furniture Sector
- (b) Small Business Association - Furniture Sector

There is no set training schemes for workers in the furniture industry. Most of the training is left to the individual manufacturers



however a number of training courses and in-factory training sessions are organized each year by organizations such as the:

- (a) Jamaica Bureau of Standards: in the areas of standards, quality control, production processes and technical information in areas of finishes, adhesives, wood technology and metrication.
- (b) Jamaica Industrial Development Corporation: in the areas of management and production.
- (c) Jamaica Export Corporation: in the areas of marketing.

6. Measures which could be taken to assure the development of the Sector

Some of the measures which should be taken to ensure a vibrant furniture and joinery industry are:

- (a) A comprehensive assessment of all available indigenous raw material which can be used in the furniture and joinery industry, so that manufacturers can know what is available locally.
- (b) The use of more indigenous raw materials in furniture for export, so that more foreign exchange can be earned, so that the raw materials which are not available locally can be purchased.
- (c) Setting up a training scheme for workers of all levels from the industry.
- (d) The introduction of proper quality control and inspection methods in all large furniture industries.
- (e) The introduction of proper production and costing techniques.
- (f) A certification scheme for all furniture for the export market so as to ensure that only good quality furniture is exported.
- (g) The provision of a central kiln drying facility.

- (h) The setting up of a marketing agency that would sell Jamaican furniture on the export market.

7. Conclusion

There is no doubt that the furniture industry is one of the most vital local industries, and in one way or another, affects every house, office, hotel, restaurant and educational institution in Jamaica, as there is no substitute for furniture.

This industry has played, and will continue to play an important role in the economic development of Jamaica. This is so because of its ability to employ not only skilled labourers but a large number of unskilled workers, and the opportunities which are opened up in other areas as a result of a vibrant furniture industry. This industry will become even more important in the future as the country moves to harness more and more of its indigenous raw materials to produce goods for export so as to earn foreign exchange.

