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**Sarawak** Planted **Forests**



## Editorial

03

New Hope For Stability And Continuity For Business Sectors Including The Timber Industry

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## editorial

# New hope for stability and continuity for business sectors including the timber industry

**S**arawak's 10<sup>th</sup> general election is over. Barisan Nasional ruling coalition victory in retaining the two-thirds majority brings new hope for stability and continuity for business sectors including the timber industry at least for the next five years.

With the victory, the government has the mandate to proceed with its economic development programmes through various initiatives such as the Economic Transformation Programme and Sarawak Corridor of Renewable Energy (SCORE).

One of the constituencies captured by the coalition was Belawai (N35). Its success

in defending this seat is crucial as it is the focal point of SCORE, a 20-year development master plan for the central region of Sarawak. It is also where Tanjung Manis New Township and Tanjung Manis Halal Hub are located.

Presently, the Belawai Assemblyman is the Honorable Datu Haji Len Talif Salleh who held key positions in the civil service previously including the Director of Forests, Deputy Permanent Secretary of the Ministry of Planning and Resource Management and General Manager of STIDC. With over 30 years working experience, he definitely will help in realising the government's aspiration to transform Tanjung Manis into a vibrant port city and the world's largest halal hub by 2030. This will certainly benefit the locals particularly in terms of business and employment opportunities.

STIDC continues to stand by the government of the day to ensure successful outcome particularly on the development of Tanjung Manis New Township and Tanjung Manis Halal Hub. It is also hoped that the timber industry would continue to support the government policies for mutual benefit.



# PLANTED FOREST PROJECTS

Sarawak Planted Forest Sendirian Berhad (SPF) is among the local timber companies in Sarawak participating in planted forest project



- Seven years old and above Acacia trees at SPF plantation in Bintulu

Concerted efforts were made by the State Government of Sarawak to ensure sustainable supply of forest resources for the benefit of the local wood-based industries and the people as a whole. This is evident with the existence of planted forest projects in the state which were being implemented through joint venture initiatives with the private sector. The designation of Bintulu Division as the Planted Forest Zone (PFZ) manifests the government's commitment in realising its objective to establish one million hectares of planted forests by 2020. This is in support

of the proposed state's first pulp and paper mill in Bintulu by supplying high quality pulpwood from the planted forests. The projects which provide an alternate source of raw materials emphasise on fast growing tree species such as Acacia mangium.

Sarawak Planted Forest Sendirian Berhad (SPF) is among the local timber companies in Sarawak participating in planted forest project. It was tasked by the State Government to manage the project in the PFZ. Hence, SPF uses the facilities of the Forest Department's nursery at Samarakan, Bintulu for the production of Acacia seedlings. The nursery uses superior quality Acacia mangium seeds to ensure that only the healthy, high growth-potential seedlings are planted. Being one of the most modern nurseries in Malaysia, Samarakan nursery is equipped with state-of-the-art technology and is capable of producing 36 million seedlings annually. Additionally, smaller nurseries, each at Nanga Kakus and Nanga Tubau also supplement seedling supplies as well as to hold the seedlings from Samarakan.

With steady supply of seedlings, SPF is able to fulfill the task of planting Acacia mangium smoothly. As at 30<sup>th</sup> June 2011, 124,618 hectares were planted. This represents 83% of the planting target of 150,000 hectares.

In undertaking its task, SPF is committed to sustainable forest management principle. This is achieved through research and development programmes which focus on continuous genetic improvement of Acacia mangium by establishing a breeding programme that involves progeny trials, clonal seed orchard establishment and genetic gain trials. The improved genetic materials are expected to yield a Mean Annual Increment (MAI) of 30 m<sup>3</sup>/ha/year. The research and development programmes had resulted in the world-class productive, cost-effective and sustainable forest plantation.

- Bee keeping







- Workers at the Samarakan nursery



- SPF R&D measurement team on field duty

In ensuring the success of planted forest project, the State Government through SPF had initiated a Community Development Programme (CDP) in order to build rapport with the peoples in the PFZ and to gain their support for the project. CDP which aims to improve their living standard includes agricultural projects (bee keeping, vegetable and fruit growing, livestock rearing as well as other food crop producing), improvement of village facilities and amenities, socio-economic survey providing education on concept of forest planting operations, assisting in land disputes and claims as well as other liaison works.



- A view of SPF R&D laboratory

The planted forest project and its downstream activities particularly pulp and paper mill are poised to benefit the rural communities significantly especially those in the PFZ. Businesses will surely boom and employment opportunities will definitely arise. Local peoples could be employed in the forest plantation and also in the pulp and paper mill. The planted forest project is also likely to lead to other development projects and services like roads, infrastructures, facilities, transport service and many others. These help to keep the rural folks in their settlements and mitigate rural-urban migration.

## SUMMARY

- Concerted efforts were made by the State Government of Sarawak to ensure sustainable supply of forest resources.
- As at 30<sup>th</sup> June 2011, 124,618 hectares were planted with *Acacia mangium*.
- The planted forest project and its downstream activities particularly pulp and paper mill are poised to benefit the rural communities significantly especially those in the PFZ.



# PLANTED FORESTS SHOWING POSITIVE RESULT

Planters begin to harvest Acacia to produce sawn-timber

**S**arawak is embarking on planted forest establishment through smart partnership with the private sector. This is in realisation of the State Government's aspiration to plant one million hectares of planted forests by 2020 with emphasis on fast growing tree species including Acacia mangium. This is to ensure sustainable supply of raw materials for local processing as well as to mitigate over dependency on raw materials from natural forests.

Planted forest projects are showing positive result as the planters begin to harvest the Acacia to produce sawn-timber. In Bintulu Division, Sarawak, Kilang Papan Bintulu Sendirian Berhad is processing Acacia sawn-timber since January this year. The company obtains its raw materials from the nearby industry players who participate in planted forest establishments.

The company's managing director, Mr. Loi Chee Kiong said his company is processing



• Acacia sawn-timber



• Engineered Acacia door

Acacia sawn-timber in support of the government's efforts to mitigate pressure from natural forests. The company's three production lines are run by thirty staff who are both locals and foreigners.

According to him, Acacia woods with the average diameter of 20-30cm are processed to produce sawn-timber. With the monthly production of 300 tons, the sawn-timber is sold to other players in Miri Division and the Peninsular Malaysia. The sawn-timber is kiln-dried to ensure high quality end products. Among the uses of Acacia sawn-timber is for manufacturing door-frames, louvers and engineered doors. The finished products are either used locally or exported to Europe. Wood residues are sold to the nearby wood-chip companies to produce charcoal briquette and therefore nothing goes to waste.





• *A close view of Acacia sawn-timber*

"The prospect of Acacia wood is better compared with other timber species due to continuous supply of raw materials. This is because the State Government is promoting intensive planted forest establishments with emphasis on Acacia. Some people said that Acacia is not viable, however I find that it is the otherwise because of the sustainable supply of raw materials and strong demand. With adequate knowledge and skills on this timber species, the future is promising", Mr. Loi said.

He opined that research and development on Acacia wood is imperative in order to support the down-stream industry as well as to add value and diversity the finished products. This will help to expand the industry besides accelerating the economy and its spin-off benefits.

A counterpart in Miri Division said, presently, his company is using Acacia sawn-timber on experimental basis and is looking into the possibility of acquiring high recovery rate of the products. Aiming to be the leader

in terms of Acacia products, it aspires to focus on product diversification in order to penetrate the global market and secure a bigger share.

Although Acacia is a new alternative, eventually the wood-based industries will rely on this timber species because of its sustainability. In view of this, there is a need to know more about Acacia.



#### **SUMMARY**

- Sarawak is embarking on planted forest establishments to plant one million hectares of planted forests by 2020.
- The prospect of Acacia wood is better compared with other timber species due to continuous supply of raw materials.
- Research and development on Acacia wood is imperative in order to support the down-stream industry as well as to add value and diversity the finished products.

• *Louvers made from Acacia wood*



# GLOBAL WOODMART

Providing a premier one-stop selling, buying and networking platform for local and international timber suppliers and buyers for temperate boreal and tropical timber

Following a successful debut in 2010 in Kuala Lumpur, the MTC Global WoodMart (MGW) 2012 will once again take centre-stage at the Kuala Lumpur Convention Centre from 4<sup>th</sup> – 6<sup>th</sup> October 2012 providing a premier one-stop selling, buying and networking platform for local and international timber suppliers and buyers for temperate boreal and tropical timber.

MGW 2012 was launched on 4<sup>th</sup> April 2011 by Tan Sri Bernard Dompok, Minister of Plantation Industries and Commodities (MPIC) in a ceremony attended by representatives from the industry and government agencies. The Minister was represented by the Secretary General of MPIC, Datin Paduka Nurmala Abdul Rahim.

Representatives from 13 companies and

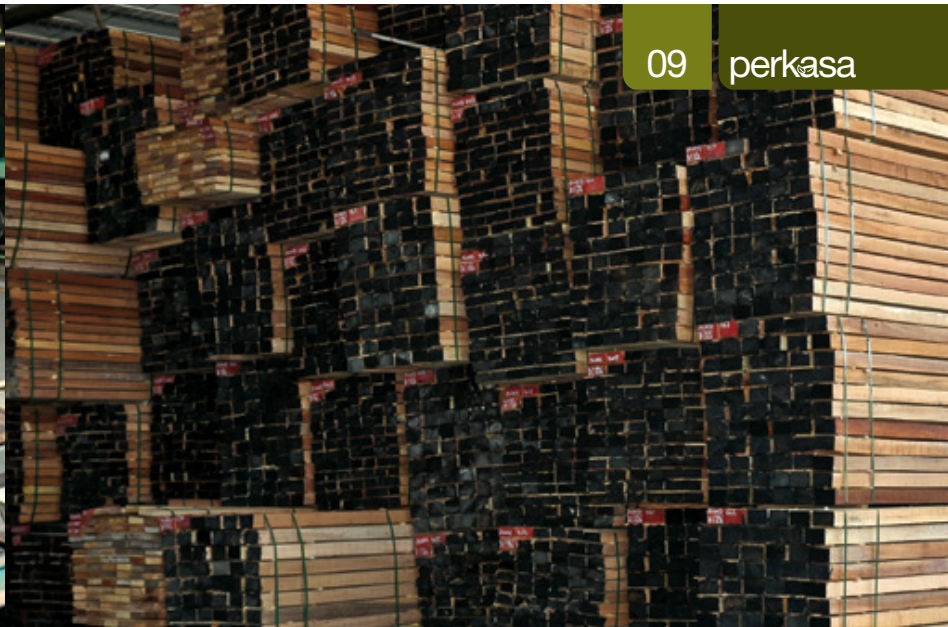
government agencies including STIDC which had confirmed participation in MGW 2012 signed Letters of Undertaking during the launch witnessed by Datin Paduka Nurmala, MTC Chairman, Datuk Aaron Ago and MTC Chief Executive Officer, Mr. Cheah Kam Huan.

A new feature of MGW 2012 is the 'Wood in Art' section, specially introduced for craftsmen to express their creativity in timber in various finished forms. There will also be a 'Best Presentation Award' for the most creative exhibitor's booth.

Apart from facilitating business among local and overseas suppliers, agents, distributors, importers, manufacturers, wholesalers and others in the supply chain, the MGW 2012







also aims to promote and encourage the wider application and use of timber from Malaysia and international sources.

In his opening remarks, the MTC Chairman said, MTC is confident that the Global WoodMart 2012 would be another outstanding success and based on exhibitors and visitors' positive feedback, the Global Woodmart has already become trade event that is looked forward to by the timber trade in 2012.

MGW's debut show in 2010 attracted 108 exhibitors from more than 20 countries including Australia, Brazil, Canada, China, France, Germany, India, New Zealand, South Korea, the UAE, the UK and the USA. In addition, over 2,000 trade buyers from 50 countries attended with sizeable representations from Japan, the Netherlands, China, India, Singapore, Thailand and the UAE.

MGW 2012 will feature a wide selection of tropical and temperate hardwood and softwood products such as logs, sawn-timber, plywood and panel products, wooden flooring, wooden decking, doors and windows, mouldings and furniture components.

Being the leader and catalyst of the timber industry in Sarawak, STIDC takes this opportunity to encourage the local industry players to participate actively in this programme in order to keep abreast with the latest trends and remain competitive.



• Nibong furniture

#### SUMMARY

- Apart from facilitating business, MGW 2012 also aims to promote and encourage the wider application and use of timber from Malaysia and international sources.
- MGW 2012 will feature a wide selection of tropical and temperate hardwood and softwood products.
- STIDC takes this opportunity to encourage the local industry players to participate actively in this programme.





- *The Honourable Datu Haji Len explaining the bigger picture on Sarawak's wood-based industry and Tanjung Manis*



# BRIGHT FUTURE FOR TIMBER INDUSTRY

There is light at the end of the tunnel despite volatile global market situation

The Honourable Datu Haji Len Taliff Salleh, former general manager of STIDC was elected as the new State Assemblyman for Belawai Constituency, N35 at the recent Sarawak general election. As one of the pioneers of STIDC, he joined the Corporation on 8th October 1979 as forestry executive officer. He was promoted as senior executive officer in 1984 and deputy general manager on 1<sup>st</sup> July 2001. Subsequently, on 31<sup>st</sup> May 2003, he was promoted as the general manager.

While at the helm, Datu Haji Len brought tremendous transformation particularly in terms of office administration which emphasised on productivity and quality.

This was evident when he devised a formula to encourage the establishment of new downstream industries. This had benefited the State in terms of revenue earnings, foreign exchange, new employments, product diversification and technology transfer.

Through STIDC Vendor Development Programme, he also helped the Bumiputera furniture entrepreneurs to gain new height. Furniture complexes were developed to provide conducive workplaces to the vendors and to help them in their business.

Datu Haji Len's important contribution to Sarawak's timber sector were also marked in his tireless efforts in the implementation of Log Quota Policy and the establishment of pulp and paper industry.

He also played pivotal roles in leading the trade missions abroad to promote timber products and new investment opportunities. This helped to entice foreign investors into the State either through direct investment or joint ventures.

His active involvement in overseas dialogues and meetings with international counterparts manifested his commitment



- *STIDC housing in Tanjung Manis*

in addressing pertinent issues for common good. This was reflected in his meeting with international organisations such as International Timber Trade Organisation (ITTO), United Nation Food and Agriculture Organization (FAO), Timber Trade Federation (TTF), Commonwealth Scientific Industrial Research Organisation (CSIRO), Swedish International Development Agency (SIDA) and the European Union (EU).

While others have negative perception on the future of the wood-based industry, he remains optimistic that there is light at the end of the tunnel despite volatile global market situation. To him, what is important is that the policy makers must move in pace with the current situation.





• An aerial view of Tanjung Manis



• The proposed master plan for Tanjung Manis Halal Hub

activities of Tanjung Manis had also diversified into many fields like the timber industry, fishery, aquaculture, agriculture, manufacturing, shipbuilding, Central Oil Distribution Terminal, Palm Oil Industrial Cluster, integrated port, fishmeal industry and halal product industry.

Pledged to pursue the State Government's development agenda he emphasised that his priority now is to ensure that Tanjung Manis is further developed as this will spur the economy of its nearby areas like Bintulu, Bakun, Sibul, Sarikei, and Bandar Sri Aman.

"Now the basic infrastructure is in place and will continue to be enhanced to facilitate the economic activities as well as to entice investors to Tanjung Manis" he added.

## SUMMARY

- wood-based industry is the mainstay of the economies particularly among the developing countries.
- Over the last ten years, Sarawak is moving forward from relying on natural forest.
- The state's wood-based industry is having a bright future and is on the right track to go further downstream.

According to him, wood-based industry is the mainstay of the economies particularly among the developing countries in view that it contributes significantly in terms of revenue and employment opportunities. Because of this the government will sustain this industry for mutual benefits.

"Over the last ten years, Sarawak is moving forward from relying on natural forest. This is in line with the government's policy on SFM and to establish one million hectares of planted forest by 2020 with emphasis on fast growing timber species. It also augurs well with the state's proposed pulp and paper industry in Bintulu. Based on ten years cutting cycle, the planted forest establishment is poised to produce 20-25

million cubic metres of raw materials per year compared with the current 10-12 million cubic metres from natural forest" he said.

Apparently, the state's wood-based industry is having a bright future and is on the right track to go further downstream taking advantage of the abundant supply of fast growing timber in the market.

His direct involvement in the Rajang Master Plan as well as in the overall developments of Tanjung Manis New Township had also brought tremendous transformation to the township. From a humble beginning, the township is now equipped with modern communication and transportation network as well as basic amenities. The economic



• Tanjung Manis Airport



• Tanjung Manis Port



# RM20 MILLION FOR **POIC**

For the implementation of POIC and the related projects under the 10<sup>th</sup> Malaysia Plan in Tanjung Manis

**T**he Ministry of Plantation Industries and Commodities, Malaysia had agreed to sponsor the Palm Oil Industrial Cluster and the related projects under the 10<sup>th</sup> Malaysia Plan (2011 – 2015) in Tanjung Manis. In line with this, the

ministry had given an allocation of RM20 million to STIDC to implement the projects.

MoU on the sponsorship was signed on 25<sup>th</sup> April 2011 by the Secretary General of the Ministry, Datin Paduka Nurmala Abdul







Rahim and STIDC General Manage, Datu Haji Sarudu Haji Hoklai.

POIC is one out of the ten key industries identified as priority industry under the Sarawak Corridor of Renewable Energy (SCORE). Tanjung Manis on the other hand is among the five new growth nodes under SCORE. It was also earmarked as one of the locations for PO1C.

PO1C will see the development of the relevant segments such as plantation and crushing, refining, oleo-chemicals, biomass and bio-diesel as well as by-products industries.

Efforts will be concerted to ensure the success of POIC by promoting investments in oil palm plantations, promoting the expansion of the refining capacity and physical development of POIC infrastructure in Tanjung Manis.

This is in line with the global annual forecasted demand growth of 8.5% of palm oil with continued fast growth expected in the oleo-chemical segment.

POIC has the potential to create 70,000 new employment opportunities by 2030. By then the potential GDP contribution could hit USD800 million.



#### SUMMARY

- POIC is one out of the ten key industries identified as priority industry under SCORE.
- PO1C will see the development of the relevant segments.
- POIC has the potential to create 70,000 new employment opportunities by 2030.



- STIDC General Manager, Datu Haji Sarudu Haji Hoklai (2<sup>nd</sup> right) and MPIC Secretary General, Datin Paduka Nurmala Abdul Rahim (2<sup>nd</sup> left) exchanging the documents after the MoU signing while STIDC Deputy General Manager, Tuan Haji Hashim Haji Bojet (right) looks on





- The Honourable Datuk Hajjah Norah (front centre) officiating at the Tanjung Manis Fishing Safari 2011

# TANJUNG MANIS FISHING SAFARI

The competition among others aimed at promoting Tanjung Manis as an eco-tourism destination

The eighth series of the annual Tanjung Manis Fishing Safari was held on 21<sup>st</sup> – 22<sup>nd</sup> May 2011. Graced by the Tanjung Manis Member of Parliament, the Honourable Datuk Hajjah Norah Tun Abdul Rahman, this year's competition was participated by 113 anglers from throughout the state. The competition among others aimed at promoting Tanjung Manis as an eco-tourism destination.

- Fish caught during the competition







In her address, Datuk Hajah Norah said besides enticing tourists to Tanjung Manis, the competition also helps to generate business opportunities among the locals. This helps to boost their living standards as well as the local industries such as handicraft and home-stay programme. In addition, it also provides the platform to foster closer rapport among the people in consonance with the 1Malaysia concept.

In view of this, she hoped that the federal government would continue to channel the assistance to develop the aquatic sport facilities as well as the shipping industry so as to provide the impetus to leverage the fishing safari to greater height. She also urged STIDC to organise the competition at grander scale in future.

"There is a lot more that could be done in order to make the economic impact of such event felt by the community. Come up with creative and innovative ideas such as embarking on home-stay programme" she said.

Meanwhile, the Belawai Assemblyman, the Honourable Datu Haji Len Talif Salleh, described the fishing industry as a source of lucrative income which is yet to be fully tapped by local fishermen. According to

him, this is due to lack of commitment among the local fishermen who are yet to master the art of deep-sea fishing and modern technology.



- *The Honourable Datu Haji Len (front) taking a close view at the fish caught during the competition*

He emphasised that more activities should be organised to expose the people to the economic opportunities surround them.

"I hope through this event and other recreational activities we can help to build greater interest among the local fishing enthusiasts to exploit the potential of the industry. It is also my sincere hope that the locals will not become observers of the development taking place in this area but make full use of it to improve their livelihood by becoming the main players" he said.



- *Winners of the Tanjung Manis Fishing Safari 2011 competition posing with the Honourable Datu Haji Len (back 4<sup>th</sup> left) and STIDC General Manager, Datu Haji Sarudu Haji Hoklai (back 5<sup>th</sup> left)*

The competition was divided into deep-sea and in-shore categories. Ramle Obeng, Chiew Hoo Sing and Chiew Fu Chai won the first, second and third placing under the deep-sea category. Mohd. Taufik Mohd. Zaidi, Saluhi Badoni and Azri Mee on the other hand emerged the first three winners under the in-shore category. Side activities such as dancing and singing competition were also carried out concurrently with the fishing Safari.

## SUMMARY

- The competition helps to generate business opportunities among the locals and boost their living standards as well as the local industries.
- It is hoped that the federal government would continue to channel the assistance to develop the aquatic sport facilities as well as the shipping industry so as to provide the impetus to leverage the fishing safari to greater height.
- Fishing industry as a source of lucrative income which is yet to be fully tapped by local fishermen.





- STIDC General Manager, Datu Haji Sarudu Haji Hoklai (front centre) launching the Attachment System Module during with the staff assembly on 11<sup>th</sup> May 2011

# ATTACHMENT SYSTEM MODULE

Enabling industry players to submit their supporting documents for the Import and Export License applications on-line

The Permit System has been in place in STIDC since 2006. Since then, several upgrading exercises were carried out to enhance the effectiveness of the delivery system. The latest upgrading was initiated in November 2010 and was successfully implemented in 1<sup>st</sup> April 2011.

This initiative enables the industry players to submit their supporting documents for the Import and Export License applications on-line using the Attachment System Module. Similar initiative was also made for the Import and Export License Statistic Reports using the Dynamic Report Module. The module allows the acquisition of Import and Export License Statistic Reports based on real time.

These initiatives benefit the industry by alleviating the costs of operation and

transportation. At the same time the systems also help STIDC to process and approve the Import and Export License applications effectively and immediately.

The Attachment System Module was officially launched by STIDC General Manager, Datu Haji Sarudu Haji Hoklai on 11<sup>th</sup> May 2011 at Wisma Sumber Alam, Kuching.

## SUMMARY

- ePermit System has been in place in STIDC since 2006.
- Several upgrading exercises were carried out to enhance the effectiveness of the delivery system.
- These initiatives benefit both the industry as well as STIDC.



# STUDY TOUR

STIDC never neglected its social obligation and the welfare of its employees



- *Singapore Study Tour participants*

Despite its heavy responsibilities towards the wood-based industry in Sarawak, STIDC never neglected its social obligation and the welfare of its employees. Due recognition is given to the staff for their continuous contribution, commitment and dedication in realising the Corporation's role as the leader and catalyst of the industry.

In appreciation of the staff's contribution, the Corporation organised a study tour to Singapore on 3<sup>rd</sup>-6<sup>th</sup> May 2011. The tour was participated by 33 staff.

Singapore, a clean and green garden city is renowned for its technological advancement. The tour therefore aimed at exposing the participants on high technologies and green concept in the country.

The four-day tour saw the participants attended the briefing by Jurong Town Corporation on the overview of the Corporation as well as its vision and mission. Some participants also had the opportunity to visit Gottwald as well as Liebherr Group's offices and warehouses to acquire a deeper insight into port technology and cargo handling equipments. In addition, they did not miss the chance to visit the Urban Redevelopment Authority, Jurong Birds Parks and Marina Base.

Besides being a gesture of appreciation, the tour was also an eye-opener for the participants who acquired new experiences on technological advancement. It is hoped that the staff would continue to serve with utmost dedication and commitment in line with the Corporation's Quality Policy "Committed to Render Quality Services Professionally for Customers' Satisfaction". It is also in support of Sarawak Civil Service Philosophy "An Honour To Serve".

## SUMMARY

- Due recognition is given to the staff for their continuous contribution, commitment and dedication.
- The tour aimed at exposing the participants on high technologies and green concept in the country.
- It is hoped that the staff would continue to serve with utmost dedication and commitment.





JANUARY-MARCH

# 2011

## market performance



### Export Value of Logs & Timber Products

For the first quarter of 2011, the value of logs and timber products exported decreased by 10% as compared to the same period of the previous year. There were decreased in the overall volumes of logs and timber products exported. Respective decreases in export volumes were logs (13%), sawn timber (21%), plywood (11%), moulding (30%), dowel (28%), block board (83%) and woodchips (42%). However, there were respective increase in the value of veneer (66%), laminated board (43%), fibreboard (14%) and particle board (89%).

Plywood remained the major contributor accounting for 52% @ RM0.8 billion of the total export value followed by logs (27% @ RM 0.4 billion) and sawn timber (10% @ RM0.2billion). (**Table 1**)





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JANUARY-MARCH

# 2011

## market performance



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## Logs

The volume of logs exported decreased by 27% to 0.8 million m<sup>3</sup> from 1.1 million m<sup>3</sup> and the value also decreased by 13% to RM439 million from RM507 million for the first quarter of 2011 against that of similar period in 2010.

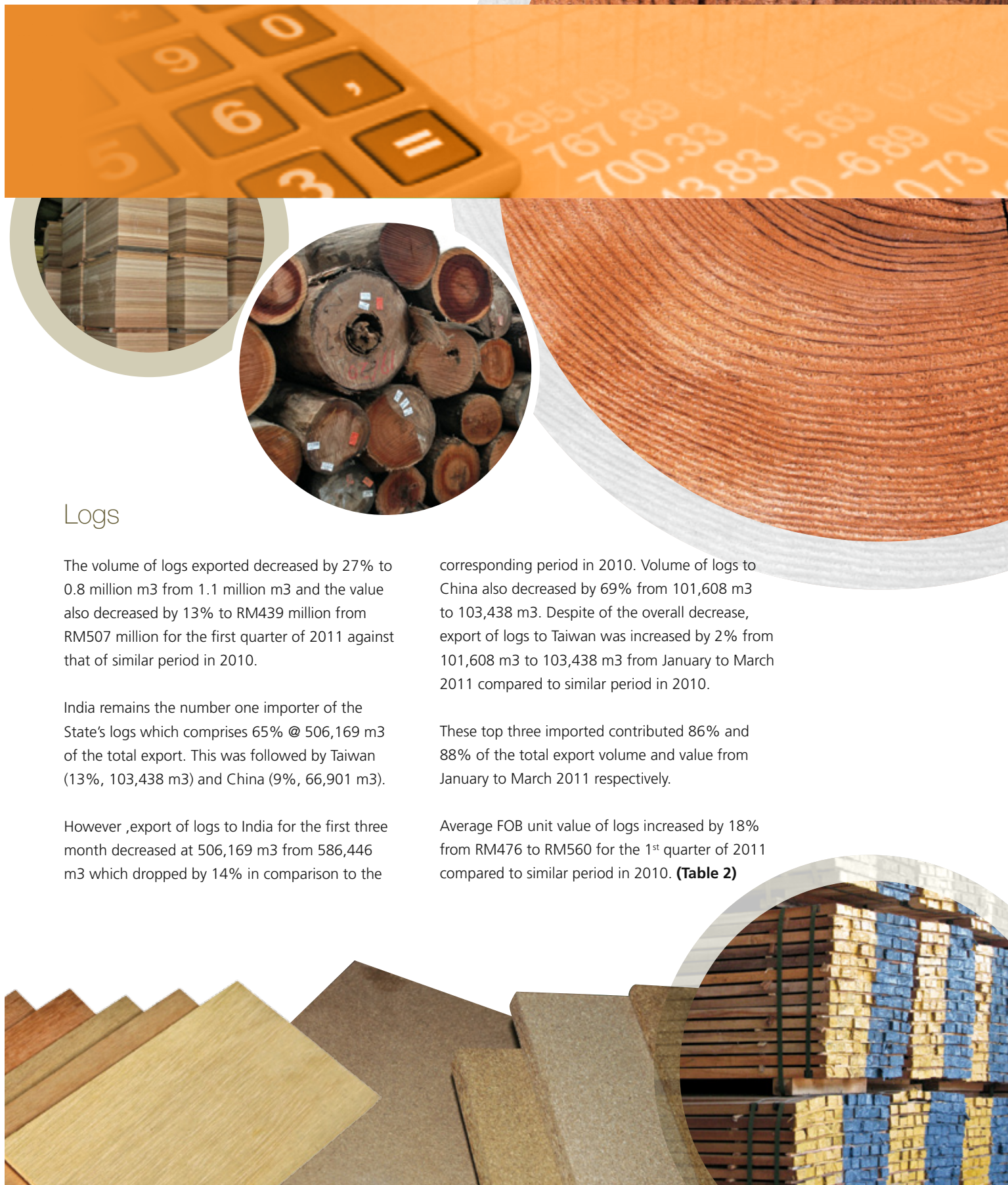
India remains the number one importer of the State's logs which comprises 65% @ 506,169 m<sup>3</sup> of the total export. This was followed by Taiwan (13%, 103,438 m<sup>3</sup>) and China (9%, 66,901 m<sup>3</sup>).

However, export of logs to India for the first three month decreased at 506,169 m<sup>3</sup> from 586,446 m<sup>3</sup> which dropped by 14% in comparison to the

corresponding period in 2010. Volume of logs to China also decreased by 69% from 101,608 m<sup>3</sup> to 103,438 m<sup>3</sup>. Despite of the overall decrease, export of logs to Taiwan was increased by 2% from 101,608 m<sup>3</sup> to 103,438 m<sup>3</sup> from January to March 2011 compared to similar period in 2010.

These top three imported contributed 86% and 88% of the total export volume and value from January to March 2011 respectively.

Average FOB unit value of logs increased by 18% from RM476 to RM560 for the 1<sup>st</sup> quarter of 2011 compared to similar period in 2010. **(Table 2)**







## Sawn Timber

Volume of sawn timber export in January to March 2011 decreased by 18% to 0.178 million m<sup>3</sup> from 0.216 million m<sup>3</sup> and the value also decreased by 21% to RM 157 million from RM197 million compared to that of similar period in 2010.

Thailand maintained its position as the number one purchaser of the State's sawntimber for the first three month of 2011 by purchasing 30% of the overall volume at 53,253 m<sup>3</sup>, followed by Middle East (17% @ 30,124 m<sup>3</sup>) and Philippines (16% @ 28,693 m<sup>3</sup>).

There were decreased by 27% in the volume of sawntimber exported to Thailand from 72,634 m<sup>3</sup> to 53,253 m<sup>3</sup>, followed by Middle East by 32% from 44,585 m<sup>3</sup> to 30,124 m<sup>3</sup> and Philippines by 8% from 31,184 m<sup>3</sup> to 28,693 m<sup>3</sup> for the first quarter 2011 compared to similar period in 2010.

Consequently, export of sawntimber to India, Middle East dan Philippines constituted 63% of the total volume and contributed 56% to the total revenue obtained from the sale of sawntimber affected from January to March 2011.

The average price of sawntimber increased by 12% from RM847 to RM951 for the 1<sup>st</sup> quarter of 2011 compared to similar period in 2010. **(Table 3)**

## Plywood

Plywood export from January to March 2011 at 588,152 m<sup>3</sup> was lower than that of 722,403 m<sup>3</sup> exported for the corresponding period in 2010. Plywood sales at RM848 million contributed 52% of the overall revenue obtained from the export of logs and timber products for the period.

Japan remained the number one importer of the State's plywood with the purchase of 297,162 m<sup>3</sup> from 314,276 m<sup>3</sup> constituting 51% of the volume exported for the 1<sup>st</sup> three months of 2011. Other big time plywood importers were Korea that made purchases of 16% at 91,529 m<sup>3</sup> and Taiwan (11% at 66,046 m<sup>3</sup>).

Export of plywood to Japan decreased by 5% from 314,276 m<sup>3</sup> to 297,162 m<sup>3</sup>, followed by Korea (42% from 158,471 m<sup>3</sup> to 91,529 m<sup>3</sup>) and Taiwan (26% from 88,737 m<sup>3</sup> to 66,046 m<sup>3</sup>) for the 1<sup>st</sup> quarter 2011 compared to that of similar period in in 2010.

Export of plywood to Japan, Korea and Taiwan constituted 77% of the overall exported volume and contributed 78% to the overall value of product from January to March 2011.

The average price of plywood increased by 10% from RM1,313 to RM1,442 for the 1<sup>st</sup> quarter of 2011 compared to similar period in 2010.





## Other Timber Product



Other timber products includes veneer, dowel, moulding, particle board, fibreboard, block board, laminated board, woodchip and other timber products (mention in Table 1). Value of these export of products was at RM188 million accounted for 12% of the overall value of logs and timber products exported during the 1<sup>st</sup> quarter of 2011.

There was respective decrease in volumes of moulding (32%), dowel (29%), block board (84%) and woodchips (25%). In spite of the overall decrease in export volume, there were an increase for veneer (45%), laminated board (43%), fibreboard (10%) and particle board (86%) from January to March 2011 compared with similar period in 2010. **(Table 5 & 6)**



## Future Outlook

By the end of March 2011, the average unit prices of timber products such as moulding, dowel, fibreboard, blockboard and particle board remain stable whereas logs, plywood, and veneer was quite encouraging. They were respectively higher in the unit price of log (18%) followed by veneer (15%), plywood (10%), blockboard (6%), fibreboard (3%), particle board (1%) and dowel (1%) for January to March 2011 compared to the previous year. However unit price of woodchip was lower by 23% then followed by sawntimber (3%) and laminated board (2%) for the first quarter of 2011 compared to that similar period in 2010.

Total production of logs in the first quarter of 2011 also decreased by 28% from 2.5 million m<sup>3</sup> in first quarter 2010 to 1.8 million m<sup>3</sup> in the first quarter 2011. It was affected by bad weather and to some extent caused by

ongoing flooding or impoundment of the Bakun

hydroelectric dam in the upper Rejang River Basin in the central region. The Bakun dam's impoundment had caused flooding of timber roads, beyond the dam and also caused shallowness of the river below the dam, thereby hampering the transportation of logs from the several concessions within the vicinity areas. (Source: The Star)

However, Sarawak timber industry could expect to enjoy an estimated 10%-15% growth in plywood export this year due to the sudden increase of demand from Japan. Such forecast was made in line with the recent earthquake and tsunami that hit Japan's northern province of Sendai, where close to 10 timber factories located at Ishinomaki, Ofunato and Miyagi city area were devastated. The reported damages included 6 plywood mills, one particle board mill and one pulp and paper mill. (source: Borneo Post)

Japan will construct around 30,000 units of temporary houses in two months as a temporary shelter for its affected population. Additional purchase may not be easy but the Malaysian suppliers will give priority to supply timber to the affected regions in Japan. (Source: Japan Lumber Reports)

In addition, the price of plywood is expected to increase up to 15% in 2011 following a 10% hike last year 2010. Analysts cited several factors as contributing to the rise in prices, including lulls in production and difficulties in sourcing raw materials caused by recent wet weather. Besides that, it is anticipated that the demand from Japan will increase substantially as it tries to rebuild all those affected buildings and structures after the devastating earthquake and tsunami in March. (source: Borneo Post)

The export performance for the first quarter 2011 was declining but it would be expected to improve gradually in the second quarter 2011.





**TABLE 1.** EXPORT SUMMARY OF TIMBER AND TIMBER PRODUCTS FROM SARAWAK

PRODUCTS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
LOG	783,811	438,873	26.92	1,066,738	507,336	28.01	(26.52)	(13.49)
SAWNTIMBER	177,601	156,596	9.61	216,401	197,014	10.88	(17.93)	(20.52)
PLYWOOD	588,152	848,129	52.02	722,403	948,822	52.39	(18.58)	(10.61)
VENEER	54,973	60,251	3.70	38,011	36,370	2.01	44.62	65.66
LAMINATED BOARD / FLOORING	5,161	11,223	0.69	3,601	7,970	0.44	43.33	40.82
MOULDING	1,923	3,931	0.24	2,823	5,627	0.31	(31.87)	(30.14)
DOWEL	293	979	0.06	412	1,362	0.08	(28.98)	(28.12)
FIBREBOARD	51,865	64,748	3.97	46,981	56,853	3.14	10.40	13.89
BLOCKBOARD	132	159	0.01	824	932	0.05	(83.93)	(82.94)
PARTICLE BOARD	34,297	15,860	0.97	18,407	8,402	0.46	86.32	88.76
OTHER PRODUCTS	16,796	24,551	1.51	20,843	31,676	1.75	(19.41)	(22.49)
WOODCHIP [Tonne]	42,038	5,012	0.31	56,242	8,710	0.48	(25.26)	(42.46)
<b>TOTAL (M3) (RM)</b>	<b>1,715,004</b>	<b>1,630,312</b>	<b>100</b>	<b>2,137,443</b>	<b>1,811,074</b>	<b>100</b>	<b>(19.76)</b>	<b>(9.98)</b>

**\*OTHER TIMBER PRODUCTS:**

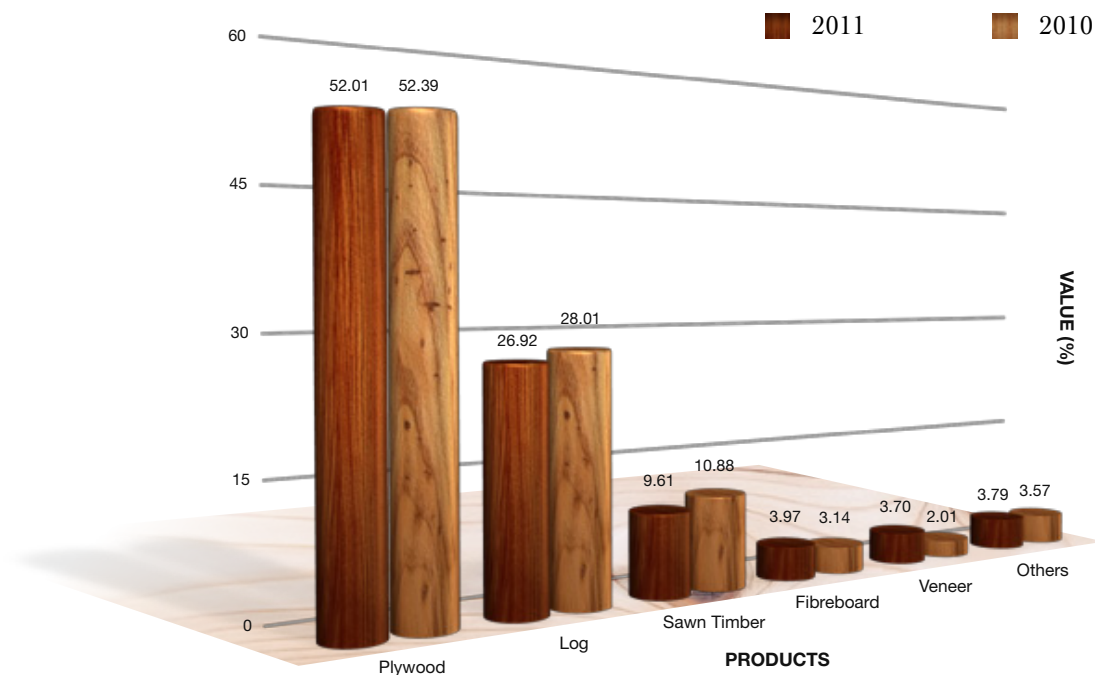
- Finger jointed
- Railways sleepers
- Laminated Veneer Lumber (LVL)
- Door & door frames
- Laminated beam
- Parquet
- Furniture and furniture parts
- Densified wood
- Wooden pallet
- Wooden fences
- Chopping board
- Wooden pegs & stakes
- Laminated post

**Notes:**

- Fibreboard include MDF and HDF
- Total of volume (m3) does not includes woodchips (tonne)
- Total does not include application/permit to transport goods within the Federation [Customs Declaration Form No.3 (CDF3)]

**EXPORT VALUE OF MAJOR TIMBER & TIMBER PRODUCTS**

FROM SARAWAK (RM'000) : 2011 / 2010

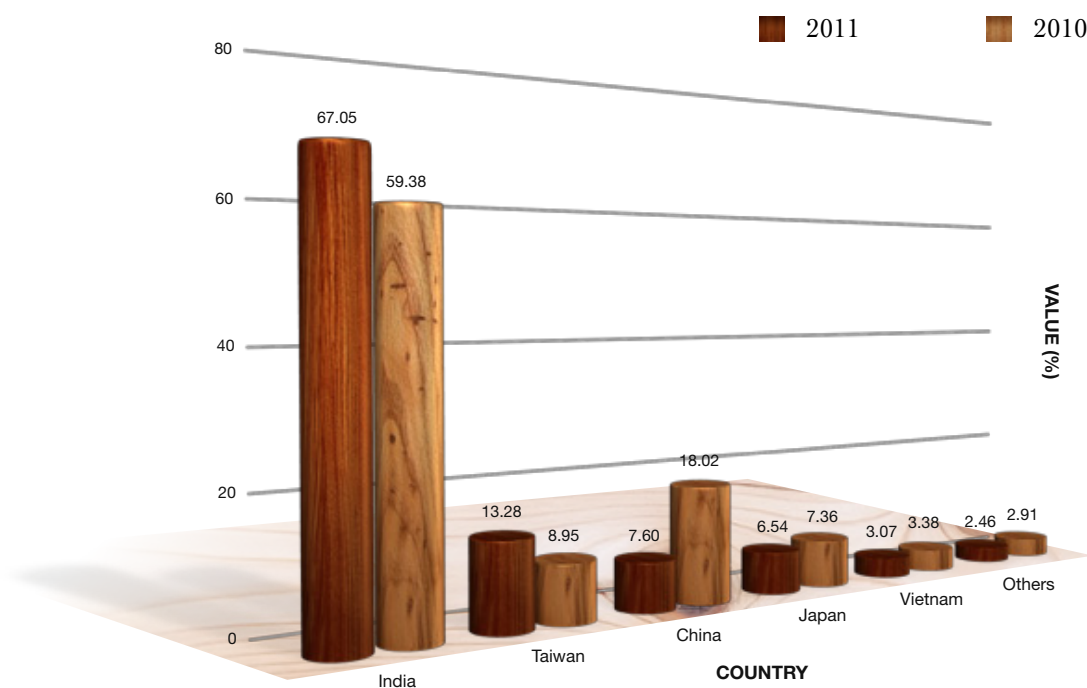


**TABLE 2.** EXPORT OF LOG BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
INDIA	506,169	294,276	67.05	586,446	301,272	59.38	(13.69)	(2.32)
TAIWAN	103,438	58,302	13.28	101,608	45,412	8.95	1.80	28.38
CHINA	66,901	33,344	7.60	216,114	91,420	18.02	(69.04)	(63.53)
JAPAN	51,822	28,712	6.54	81,440	37,352	7.36	(36.37)	(23.13)
VIETNAM	32,162	13,462	3.07	48,699	17,140	3.38	(33.96)	(21.46)
KOREA	12,535	5,981	1.36	25,552	10,899	2.15	(50.94)	(45.12)
THAILAND	6,520	3,555	0.81	6,492	3,518	0.69	0.42	1.05
INDONESIA	3,956	914	0.21	-	-	-	100.00	100.00
PAKISTAN	308	327	0.07	386	323	0.06	(20.20)	1.24
<b>TOTAL</b>	<b>783,811</b>	<b>438,873</b>	<b>100.00</b>	<b>1,066,738</b>	<b>507,336</b>	<b>100.00</b>	<b>(26.52)</b>	<b>(13.49)</b>

**EXPORT VALUE OF LOG TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010





**TABLE 3.** EXPORT OF SAWN TIMBER BY COUNTRY OF DESTINATIONS

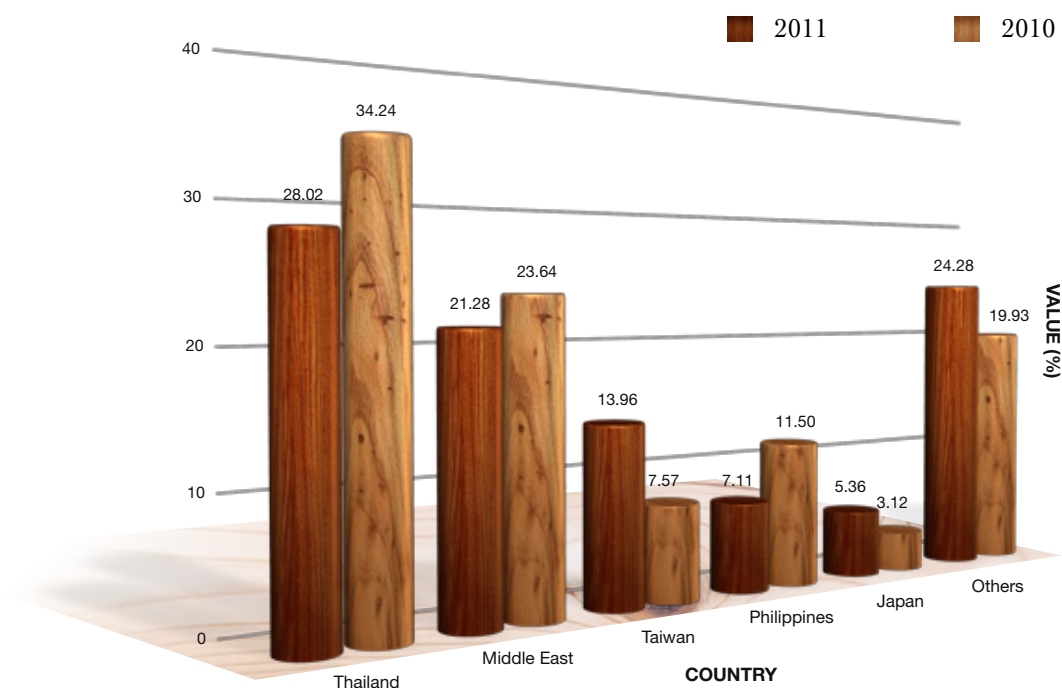
DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
THAILAND	53,253	43,884	28.02	72,634	67,459	34.24	(26.68)	(34.95)
MIDDLE EAST	30,124	33,317	21.28	44,585	46,567	23.64	(32.44)	(28.45)
PHILIPPINES	28,693	11,127	7.11	31,184	22,664	11.50	(7.99)	(50.90)
TAIWAN	23,788	21,858	13.96	22,781	14,911	7.57	4.42	46.59
SINGAPORE	8,431	8,007	5.11	9,055	8,330	4.23	(6.89)	(3.88)
CHINA	6,727	5,785	3.69	9,523	7,739	3.93	(29.36)	(25.25)
KOREA	5,283	5,016	3.20	5,700	5,457	2.77	(7.32)	(8.08)
JAPAN	5,281	8,390	5.36	4,393	6,147	3.12	20.20	36.49
SOUTH AFRICA	3,797	4,246	2.71	5,589	5,876	2.98	(32.06)	(27.74)
HONG KONG	3,761	3,233	2.06	3,759	3,505	1.78	0.07	(7.76)
OTHERS*	8,463	11,733	7.49	7,197	8,359	4.24	17.59	40.36
<b>TOTAL</b>	<b>177,601</b>	<b>156,596</b>	<b>100</b>	<b>216,401</b>	<b>197,014</b>	<b>100</b>	<b>(17.93)</b>	<b>(20.52)</b>

**\*OTHER DESTINATION:**

- AUSTRALIA
- BELGIUM
- BRUNEI
- FRANCE
- INDIA
- MALDIVES
- MAURITIUS
- NETHERLANDS
- REUNION
- RUSSIA
- SEYCHELLES
- SRI LANKA
- UNITED KINGDOM
- UNITED STATES
- VIETNAM
- Within Malaysia (Peninsular or Sabah)

**EXPORT VALUE OF SAWN TIMBER TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



**TABLE 4.** EXPORT OF PLYWOOD BY COUNTRY OF DESTINATIONS

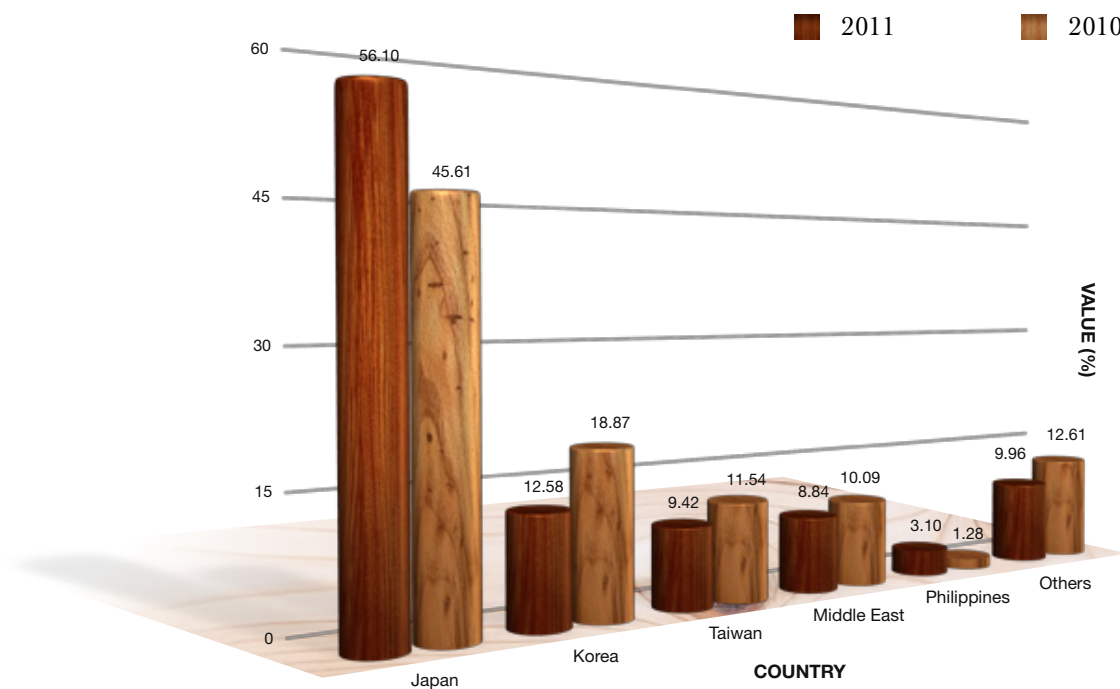
DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
JAPAN	297,162	475,835	56.10	314,276	432,722	45.61	(5.45)	9.96
KOREA	91,529	106,685	12.58	158,471	179,054	18.87	(42.24)	(40.42)
TAIWAN	66,046	79,865	9.42	88,737	109,474	11.54	(25.57)	(27.05)
MIDDLE EAST	57,769	74,977	8.84	74,173	95,772	10.09	(22.11)	(21.71)
PHILIPPINES	17,870	26,313	3.10	8,879	12,156	1.28	101.26	116.46
CHINA	12,855	17,651	2.08	12,453	18,825	1.98	3.23	(6.24)
HONG KONG	11,172	14,113	1.66	9,260	12,163	1.28	20.65	16.03
UNITED STATES	10,577	15,236	1.80	23,223	40,220	4.24	(54.45)	(62.12)
AUSTRALIA	8,526	18,785	2.21	6,674	11,442	1.21	27.74	64.18
BRUNEI	4,150	4,262	0.50	144	202	0.02	2776.66	2009.90
OTHERS*	10,496	14,407	1.70	26,113	36,792	3.88	(59.80)	(60.84)
<b>TOTAL</b>	<b>588,152</b>	<b>848,129</b>	<b>100</b>	<b>722,403</b>	<b>948,822</b>	<b>100</b>	<b>(18.58)</b>	<b>(10.61)</b>

**\*OTHER DESTINATION:**

- BRUNEI
- CANADA
- GERMANY
- INDIA
- INDONESIA
- IRELAND
- ITALY
- MALDIVES
- MALTA
- MAURITIUS
- MEXICO
- NETHERLANDS
- NEW ZEALAND
- RUSSIA
- SINGAPORE
- SOUTH AFRICA
- THAILAND
- UNITED KINGDOM
- VIETNAM

**EXPORT VALUE OF PLYWOOD TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



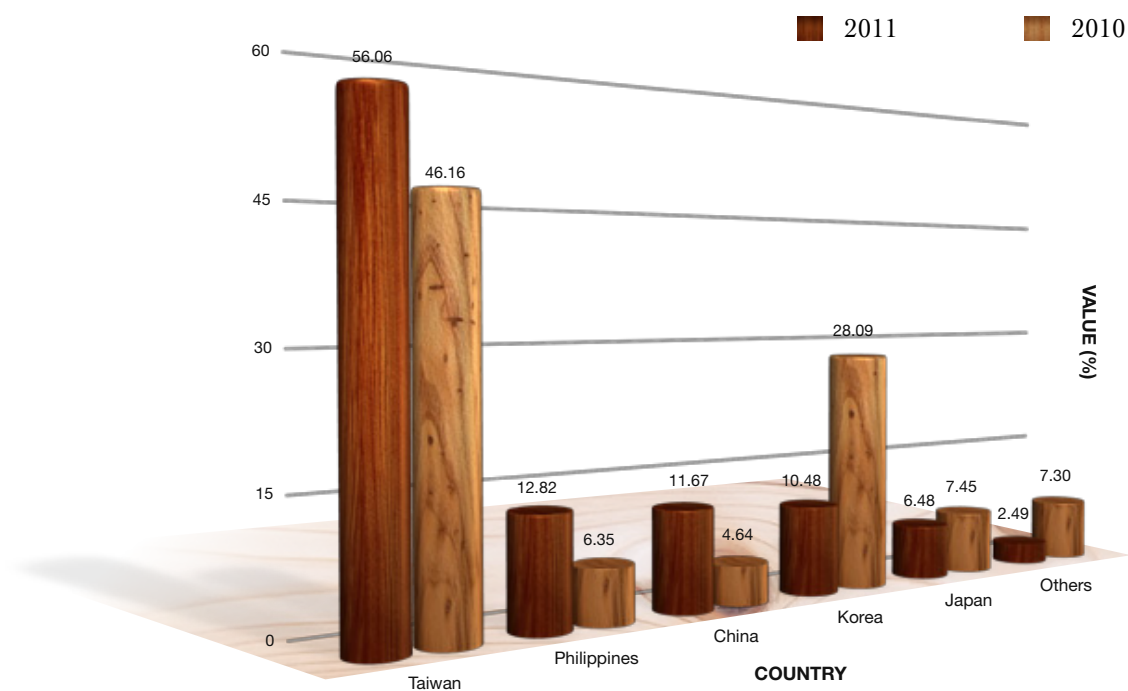


**TABLE 5.** EXPORT OF VENEER BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
TAIWAN	30,472	33,778	56.06	17,496	16,789	46.16	74.17	101.19
CHINA	8,587	7,031	11.67	2,229	1,689	4.64	285.19	316.28
PHILIPPINES	6,816	7,726	12.82	2,156	2,310	6.35	216.15	234.46
KOREA	6,085	6,312	10.48	12,089	10,216	28.09	(49.66)	(38.21)
JAPAN	2,473	3,903	6.48	1,802	2,711	7.45	37.19	43.97
AUSTRALIA	520	1,485	2.46	169	1,519	4.18	208.19	(2.24)
SINGAPORE	21	15	0.02	34	25	0.07	(38.77)	(40.00)
THAILAND	-	-	-	2,037	1,111	3.05	(100.00)	(100.00)
<b>TOTAL</b>	<b>54,973</b>	<b>60,250</b>	<b>100</b>	<b>38,011</b>	<b>36,370</b>	<b>100</b>	<b>44.62</b>	<b>65.66</b>

**EXPORT VALUE OF VENEER TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010

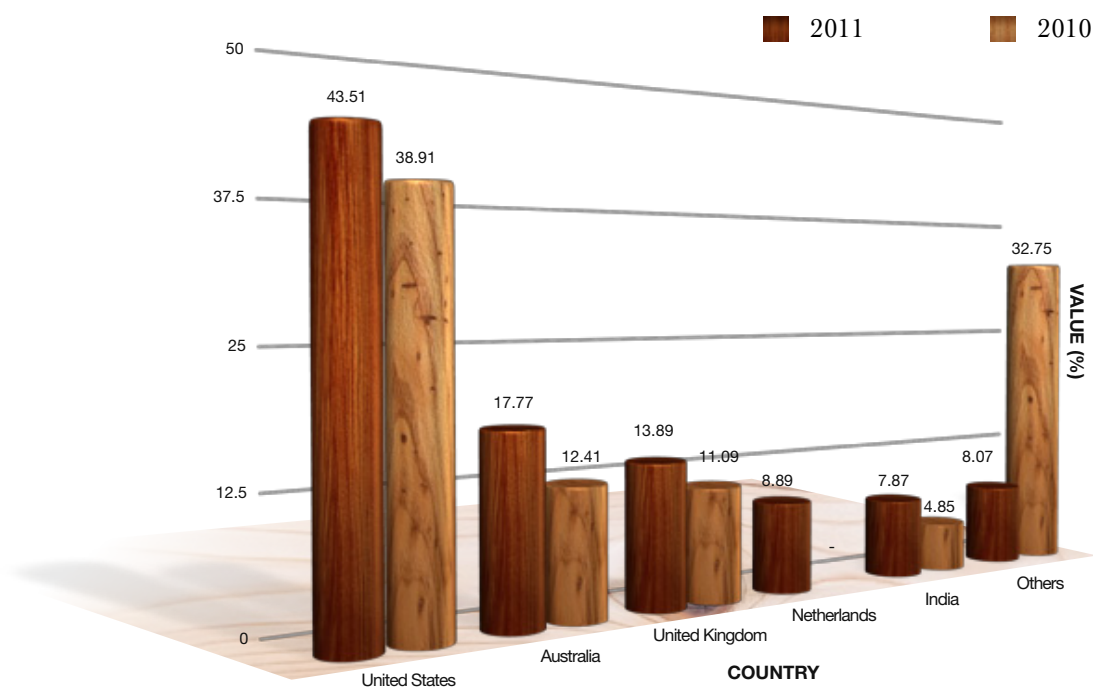


**TABLE 6.** EXPORT OF DOWEL BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
UNITED STATES	128	426	43.51	160	530	38.91	(19.95)	(19.62)
AUSTRALIA	71	174	17.77	83	169	12.41	(14.63)	2.96
UNITED KINGDOM	39	136	13.89	39	151	11.09	(0.08)	(9.93)
NETHERLANDS	18	87	8.89	-	-	-	100.00	100.00
INDIA	17	77	7.87	17	66	4.85	2.76	16.67
SWITZERLAND	17	74	7.56	16	63	4.63	8.31	17.46
CANADA	2	5	0.51	8	25	1.84	(78.47)	(80.00)
DENMARK	-	-	-	13	66	4.85	(100.00)	(100.00)
GERMANY	-	-	-	16	87	6.39	(100.00)	(100.00)
JAPAN	-	-	-	39	152	11.16	(100.00)	(100.00)
SOUTH AFRICA	-	-	-	20	53	3.89	(100.00)	(100.00)
<b>TOTAL</b>	<b>293</b>	<b>979</b>	<b>100</b>	<b>412</b>	<b>1,362</b>	<b>100</b>	<b>(28.98)</b>	<b>(28.12)</b>

**EXPORT VALUE OF DOWEL TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010





**TABLE 7.** EXPORT OF MOULDING BY COUNTRY OF DESTINATIONS

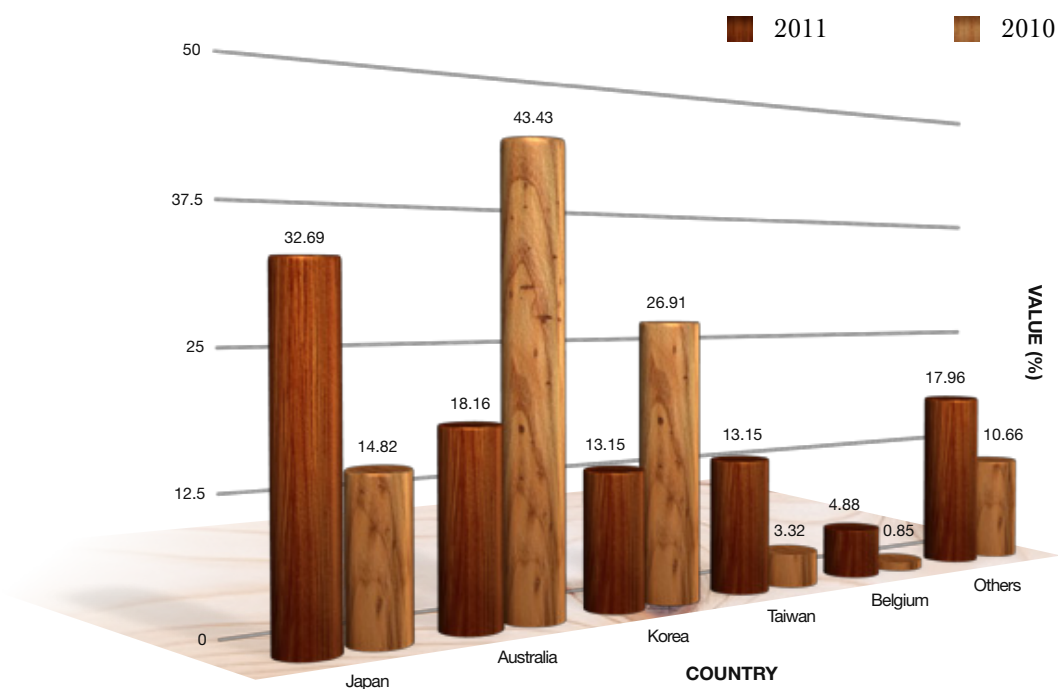
DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
JAPAN	732	1,285	32.69	523	834	14.82	39.88	54.08
AUSTRALIA	282	714	18.16	1,021	2,444	43.43	(72.33)	(70.79)
KOREA	255	517	13.15	877	1,514	26.91	(70.96)	(65.85)
TAIWAN	184	517	13.15	62	187	3.32	195.29	176.47
BELGIUM	64	192	4.88	29	48	0.85	118.95	300.00
SINGAPORE	56	53	1.35	21	25	0.44	165.48	112.00
GERMANY	56	103	2.62	26	41	0.73	112.95	151.22
NETHERLANDS	49	35	0.89	-	-	-	100.00	100.00
UNITED KINGDOM	46	136	3.46	41	133	2.36	12.03	2.26
SEYCHELLES	42	30	0.76	31	28	0.50	36.86	7.14
OTHERS*	157	349	8.88	192	373	6.63	(18.24)	(6.43)
<b>TOTAL</b>	<b>1,923</b>	<b>3,931</b>	<b>100</b>	<b>2,823</b>	<b>5,627</b>	<b>100</b>	<b>(31.87)</b>	<b>(30.14)</b>

**\*OTHER DESTINATION:**

- CANADA
- CHINA
- DENMARK
- INDIA
- ITALY
- MAURITIUS
- SOUTH AFRICA
- TURKEY
- UNITED STATES

**EXPORT VALUE OF MOULDING TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



**TABLE 8.** EXPORT OF FIBREBOARD BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
JAPAN	35,586	50,142	77.44	31,326	43,151	75.90	13.60	16.20
INDONESIA	3,419	3,028	4.68	6,849	6,066	10.67	(50.08)	(50.08)
PHILIPPINES	3,326	2,854	4.41	2,291	1,656	2.91	45.17	72.34
INDIA	2,497	2,032	3.14	632	365	0.64	295.07	456.71
THAILAND	1,882	1,692	2.61	412	452	0.80	356.91	274.34
VIETNAM	1,331	1,223	1.89	710	680	1.20	87.56	79.85
TAIWAN	1,276	1,225	1.89	1,382	1,361	2.39	(7.70)	(9.99)
CHINA	855	786	1.21	705	719	1.26	21.21	9.32
NETHERLANDS	464	760	1.17	384	588	1.03	20.74	29.25
BRUNEI	434	360	0.56	643	548	0.96	(32.52)	(34.31)
OTHERS*	795	646	1.00	1,646	1,267	2.23	(51.71)	(49.01)
<b>TOTAL</b>	<b>51,865</b>	<b>64,748</b>	<b>100</b>	<b>46,981</b>	<b>56,853</b>	<b>100</b>	<b>10.39</b>	<b>13.89</b>

**\*OTHER DESTINATION:**

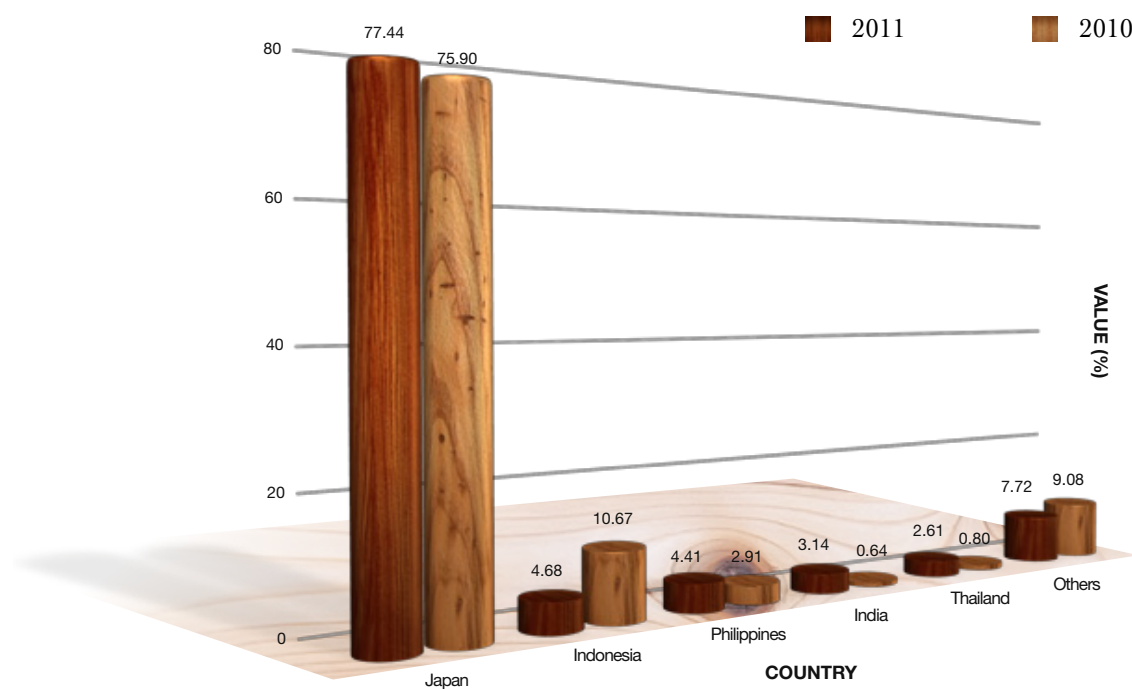
- AUSTRALIA
- KOREA
- SINGAPORE
- SOUTH AFRICA

## Notes:

- Fibreboard include MDF and HDF

**EXPORT VALUE OF FIBREBOARD TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



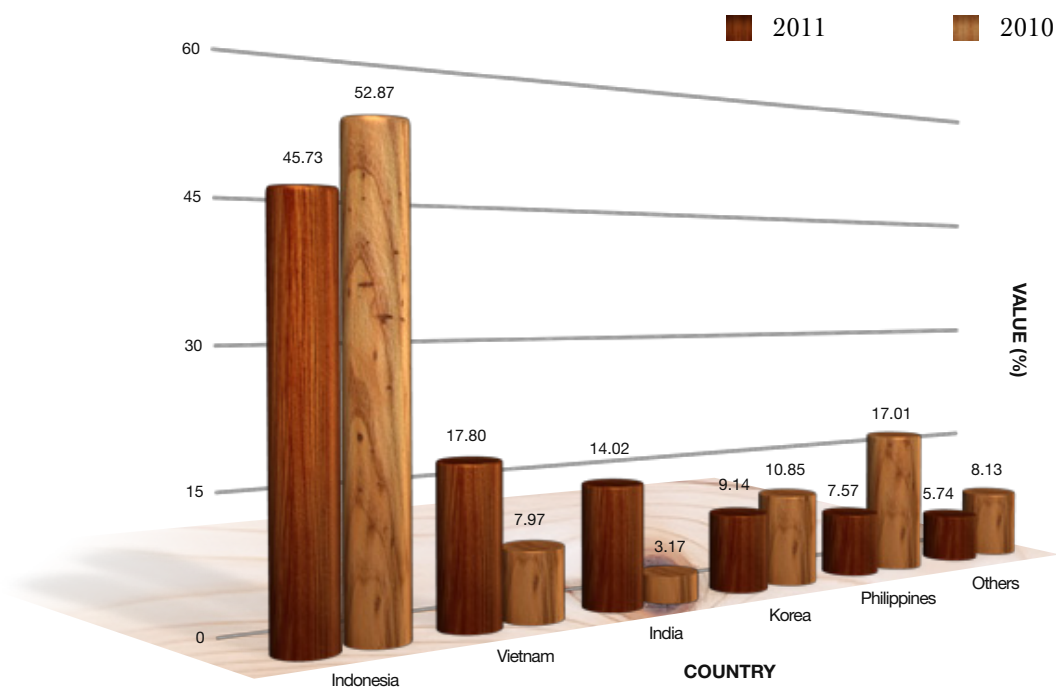


**TABLE 9.** EXPORT OF PARTICLE BOARD BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 January - March			2010 January - March			% Change 2011 / 2010	
	Volume (M³)	FOB Value (RM'000)	Value %	Volume (M³)	FOB Value (RM'000)	Value %	Volume	Value
INDONESIA	15,832	7,252	45.73	9,642	4,442	52.87	64.20	63.26
VIETNAM	6,615	2,823	17.80	1,232	670	7.97	436.74	321.34
INDIA	4,743	2,223	14.02	668	266	3.17	609.98	735.71
KOREA	2,589	1,450	9.14	2,202	912	10.85	17.58	58.99
PHILIPPINES	2,465	1,201	7.57	3,022	1,429	17.01	(18.44)	(15.96)
BRUNEI	856	393	2.48	-	-	-	100.00	100.00
BANGLADESH	506	116	0.73	1,027	330	3.93	(50.72)	(64.85)
JAPAN	461	238	1.50	365	202	2.40	26.44	17.82
CHINA	230	164	1.03	115	86	1.02	100.00	90.70
KENYA	-	-	-	134	65	0.77	(100.00)	(100.00)
<b>TOTAL</b>	<b>34,297</b>	<b>15,860</b>	<b>100</b>	<b>18,407</b>	<b>8,402</b>	<b>100</b>	<b>86.32</b>	<b>88.76</b>

**EXPORT VALUE OF PARTICLE BOARD TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



# Publication Items FOR SALE

## ORDER FORM



### Publications Catalogue:

- The Malaysian Grading Rules For Sawn Hardwood Timber (English) ☐
- Commercial Timber Species Of Sarawak (a set of 3) (English) ☐
- Guide To Timber Trade, Sarawak (2010/2011) ☐
- Manual Of Sarawak Timber Species ☐
- Sarawak Log Grading Rules (English) ☐
- Timber Sample Box (English Description) ☐

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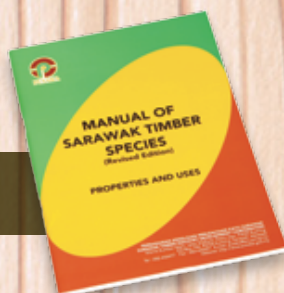


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# to us, Nothing Should go to **WASTE**



Utilizing technology and innovations for timber products are the hallmarks of STIDC's continuous pursuit of excellence for the timber industry and rightly, nothing should go to waste. In this aspect, STIDC has strived to make use of every part of the log for useful purposes and further enrich downstream industries for the benefit of the state and its people, now and for the future. STIDC firmly believes that forest resources should be optimally utilized for a sustainable future.

**PERBADANAN KEMAJUAN PERUSAHAAN KAYU SARAWAK**  
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