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# perkasa

sarawak timber industry development corporation

january-march 2012

quarterly newsletter

INCREASE  
MARKET  
SHARE



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# editorial

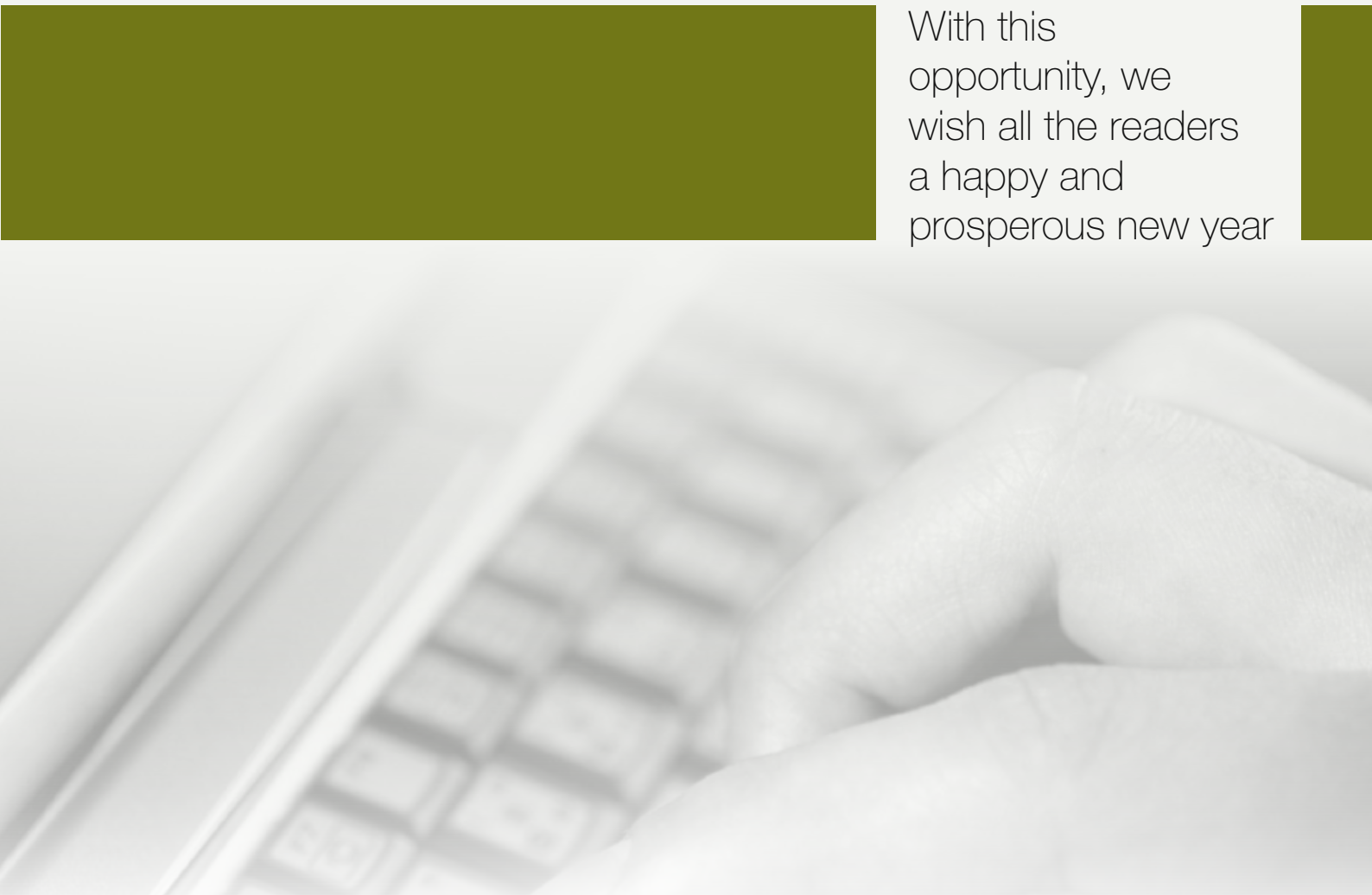
**A**t this time of the year the people are contemplating on the New Year resolution. As for us, we remain focus on our role as the leader and catalyst of the wood-based sector in Sarawak amid the global economic uncertainty.

The global phonema which has direct impact on the economy warrants our continuous commitment and steadfastness in facing the challenges. With the Government's Economic Transformation Plan (ETP) and the Government's Transformation Plan (GTP), we hope that it would ease the impact of the volatile world economy on business sectors including the wood-based industry.

The year of the dragon which symbolises auspiciousness, courage, vitality, strength and abundance of good fortune also brings optimism of the economic recovery and that the business sectors would rise above the challenging time.

It is therefore vital that the industry players support the government's efforts in strengthening the economy and find ways to boost demand in order to remain competitive at the global arena. It is also imperative that they formulate their business contingency plans innovatively in order to move in pace with the current situation.

With this opportunity, we wish all the readers a happy and prosperous new year



# INVESTMENT AND TIMBER SELLING MISSION

The highlights of the mission included the Sarawak Investment and Timber Seminar, individual business meeting, special meeting and briefing

**K**orea is among Sarawak's important markets for timber and timber products particularly plywood, sawn timber and veneer. Timber trade between the two started back in 1964 with the export of logs.

The overall export of timber and timber products to Korea was on up trend over the last five years from 478,315 m<sup>3</sup> worth RM478 million in 2006 and reached its highest point at 756,856 m<sup>3</sup> worth RM740 million in 2009 and eventually dropped to 692,891 m<sup>3</sup> worth RM701 million in 2010.


Exports to Korea accounted for 11% of the state's overall export value of timber and timber products in 2009. However, the market share dropped to 10% in 2010 with plywood as the main timber products exported and made up 74% of the overall export volume or 512,299 m<sup>3</sup> and 81% of value or RM571 million. This was followed by logs with 73,175 m<sup>3</sup> worth RM33 million, veneer 47,516 m<sup>3</sup> worth RM42 million, sawn timber 37,672 m<sup>3</sup> worth RM35

million and mouldings 2,959 m<sup>3</sup> worth RM5 million. Other products included particleboard (2,202 m<sup>3</sup>), MDF (1,33 m<sup>3</sup>), laminated board (2,803 m<sup>3</sup>) and blockboard (311 m<sup>3</sup>).

Recognising the importance of Korean market STIDC had organised an investment and timber selling mission to Seoul, Korea on 10-15<sup>th</sup> January 2012. Minister of Resource Planning and Environment II as well as Minister of Public Utilities and Minister of Industrial Development cum STIDC Chairman, Datuk Amar Haji Awang Tengah Ali Hassan led the 75-member delegation. The mission was also participated by by assistant ministers and senior officials of the government and the private sector.



• Visit to Dongwha Enterprise Co. Ltd. led by Datu Haji Len Talif Salleh (7<sup>th</sup> right)

Welcome to Samsung Electronics! 

Sarawak Mission led by Honorable Minister Datuk Amar



The Honourable Datuk Amar Haji Awang Tengah (5<sup>th</sup> left) and adviser of Samsung's Corporate Human resources team, Mr. Yongho Heu (6<sup>th</sup> left) and the delegation from Sarawak pose for a photo at Samsung Digital City, Gyeonggi Province

The mission among others aimed at enhancing buyers' confidence and expanding Sarawak's timber market in Korea. It was also to obtain current information on the Korean economic outlook and the timber market as well as other economic activities in Seoul so as to promote and increase the sales of other timber species and products. In addition, it also aimed to entice potential investors in the timber and non-timber related sectors and to establish and strengthen trade relationship with the existing and potential buyers and end-users.

The highlights of the mission included the Sarawak Investment and Timber Seminar, individual business meeting, special meeting

Trade and Investment Seminar •

and briefing to delegation by Malaysian External Trade Development Corporation (MATRADE), MIDA as well as the Embassy officials and head of Sarawak delegation and related officials.

The mission also saw the delegation visiting Dong-bu Hi Tek Co. Ltd, Young Lim Co.Ltd, Dongwha Enterprise Co.Ltd, Samsung Digital City, Global Brain and Business Group, Borneo International Furniture (BIF Borneo) Factory and showroom and Korea Forest Service.



## SUMMARY

- The overall export of timber and timber products to Korea was on up trend over the last five years
- Recognising the importance of Korean market STIDC had organised an investment and timber selling mission to Seoul, Korea
- The mission among others aimed at enhancing buyers' confidence and expanding Sarawak's timber market in Korea

**SARAWAK INVESTMENT & TIMBER SELLING  
SEMINAR AND BUSINESS MEETING**  
**사라와크 투자 및 목재 수출 세미나와 비즈니스 상담회**  
 11 JANUARY 2012  
 CRYSTAL BALLROOM  
 LOTTE HOTEL, SEOUL

- STA Chairman, Datuk Wong Kie Yik (2<sup>nd</sup> right) exchanging the documents with Mr. Lee Kyong Ho witnessed by Mr. Don-Koo Lee (3<sup>rd</sup> left), The Honourable Datuk Amar Awang Tengah (3<sup>rd</sup> right) and Datuk Ramlan Ibrahim



# 3 MoUs Signed

STA, KLIC, KPTC and KWA signed three MoUs



“The Sarawak Investment and Timber Selling Mission to Seoul, Korea is part of the continuous efforts of the state government to promote the timber and timber products in the Korean market apart from creating awareness on the investment opportunities in Sarawak” the Honourable Datuk Amar Haji Awang Tengah Ali Hassan

- The Honourable Datuk Amar Haji Awang Tengah (2<sup>nd</sup> left), and members of Sarawak delegation, addresses Korean captains of industries at the round table discussion in Seoul



- The Honourable Datuk Amar Haji Awang Tengah (middle) presenting souvenirs to Mr. Don-Koo Lee, Minister of Korea Forest Service while Malaysian Ambassador to Korea Datuk Ramlan Ibrahim looks on

Three Memorandums of Understanding (MoUs) were signed between Sarawak Timber Association (STA), Korea Lumber Industry Co-operative (KLIC), Korea Timber-Plywood Confederation (KPTC) and Korea Wood Association (KWA) in conjunction with the Sarawak Investment and Timber Selling Mission to Seoul, Korea on 11<sup>th</sup> January 2012.

Witnessing the signing ceremony of the MoUs were the Minister of Korean Forest Service, Mr. Don Koo Lee, Minister of Industrial Development cum Second Minister of Resource Planning and Environment of Sarawak, the Honourable Datuk Amar Haji Awang Tengah Ali Hassan and the Malaysian Ambassador to Korea, Datuk Ramlan Ibrahim.

STA was represented by its Chairman, Datuk Wong Kie Yik. KLIC, KPTC and KWA on the other hand were represented by their respective Chairmen namely Mr. Lee Kyong

Ho, Mr. Lee Sang Wong and Mr. Yang Yang Koo.

With the signing of these MoUs, the wood-based sector in Sarawak can look forward to fostering a closer networking and bilateral co-operation with the South Korean timber industry players. “We are looking forward for a better mutual understanding on trade policies and practices, including the legality system in Sarawak through these MoUs” Datuk Wong Kie Yik said.

The Honourable Datuk Amar Haji Awang Tengah, in his keynote address said these MoUs would further strengthen trade relationship between the wood-based industry players in Sarawak and their Korean counterparts. He also hoped that these MoUs would boost trade and investment for both Sarawak and South Korea.

In his speech, Mr. Don Koo Lee commended the efforts of both Sarawak and South Korea in strengthening the bilateral ties and in conducting the seminar adding that these efforts marked a new milestone for co-operation, trade and investment for mutual benefit.

Meanwhile, Datuk Ramlan said there has been an uptrend in terms of trade and bilateral relationship among the heads of government to the private sector between Malaysia and the Republic of Korea. This is vital in facilitating the trade and investment between the two countries.

#### SUMMARY

- With the signing of these MoUs, the wood-based sector in Sarawak can look forward to fostering a closer networking and bilateral co-operation with the South Korean timber industry players
- The efforts of both Sarawak and South Korea in strengthening the bilateral ties and in conducting the seminar marked a new milestone for co-operation, trade and investment for mutual benefit
- There has been an uptrend in terms of trade and bilateral relationship among the heads of government to the private sector between Malaysia and the Republic of Korea

# MEDIA NIGHT



## STIDC acknowledging the media contribution

**M**edia plays important role in disseminating precise information to the public.

In Sarawak, the media works closely with both the government and private sectors including the forestry and timber fraternities in giving the latest information on current issues.

To acknowledge the media contribution, STIDC had organised the friendly Bowling Competition and Media Appreciation Night at the leading hotels in Kuching, Sarawak on 12<sup>th</sup> February 2012.

- *STIDC General Manager, Datu Haji Sarudu Haji Hoklai (3<sup>rd</sup> right) together with the VIPs at the Media Appreciation Night. Also seen the STIDC Deputy General Manager, Tuan Haji Hashim Bojet (right)*



This event aimed to further strengthen the rapport with members of the media. It also provided the platform for the media to understand the roles of the related agencies as well as the actual situation in both fraternities.

The forestry and timber sectors in Sarawak are not spared from various challenges such as the adverse impact of the global economic downturn as well as the allegations made by foreign NGOs. With the help of the media the challenges could be handled and addressed effectively by giving

the correct information. This is important so as to rectify misconception over these sectors.

STIDC General Manager, Datu Haji Sarudu Haji Hoklai said the Corporation will continue to work closely with the local media to reach out to the public on government policies. Describing the media as the agent of change, he said they play a vital role in educating the readers. He advised them to write meticulously in order to maintain the reputation of the sectors concerned.

The local media should never rely on or totally believe the reports from foreign media on certain issues but instead must always seek the truth through fact finding and investigation, he said.

It is also crucial for members of the media to write carefully and to continue to enhance their writing standard. This is to ensure that they are not lagged behind their counterparts elsewhere. This is because unscrupulous reporting could tarnish the image of the State and adversely affect investments, he emphasised.



- *STIDC General Manager, performing the symbolic opening of the Bowling Friendly Competition*



#### SUMMARY

- The media night aimed to further strengthen the rapport with members of the media.
- STIDC will continue to work closely with the local media to reach out to the public on government policies.
- It is crucial for members of the media to write carefully and to continue to enhance their writing standard.



- *Stage presentation by members of the media*



- *Natural Resources and Environment Minister, the Honourable Dato Sri Douglas Uggah Embas (4<sup>th</sup> right) and the Malaysian Forestry Research and Development Board Chairman, the Honourable Hajjah Nancy Haji Shukri (2<sup>nd</sup> left) witnessing the exchange of MoU documents between FRIM, UNIMAS and STIDC*

# INCREASE MARKET SHARE

The value of the global furniture trade had increased from US\$42 billion in 1997 to US\$100 billion in 2010. Local furniture entrepreneurs should strive to increase their market share

The Sarawak Furniture Industry Development Seminar 2012 which was jointly organised by FRIM, Universiti Malaysia Sarawak (UNIMAS) and STIDC marked a new milestone in sustaining the local furniture industry based on research, development and commercialisation (R,D&C). It also provided the avenue for discussion among the industry players and the related agencies on ways to further develop the local furniture industry particularly in Sarawak, the Honourable Dato Sri Douglas Uggah Embas, Natural Resources and Environment Minister said.

The furniture industry is the major segment of the down-stream manufacturing activities of the wood-based industry which is dynamic whether at the global or national level. Over the past decades, the global furniture trade had grown tremendously. According to the Centre for Industrial Studies (CSIL) in Milano, Italy, the value of the global furniture trade had increased from US\$42 billion in 1997 to US\$100 billion in 2010.

Malaysia had also achieved an encouraging performance both in furniture production and export, thereby contributing significantly to the national economy. Ministry of International Trade and Industry (MITI) statistics showed that in 2010 there were 1,800 furniture companies in the country with 34,000 workers. Over 90% of the locally made furniture was exported to the United States, Japan and Singapore. The national export value of furniture in 2010

was RM7.96 billion compared with RM5.09 billion in 2001. During the corresponding period, the national import value of furniture had increased from RM0.38 billion to RM1.31 billion, the minister said.

He stressed that although the future of this industry is bright due to increasing demand from international market, the national furniture industry including in Sarawak is facing various challenges due to:

- stiff competition particularly from the emerging economic powers like China, Indonesia and Vietnam;
- the level of application on the latest designing and furniture technology among the local furniture industry players is still low as compared with their regional and international counterparts;
- the local furniture industry is still inclined to the medium and low end markets, thus there immense opportunities to produce high end products for niche market;
- volatile global economy and fluctuation in currency rates pose adverse impacts to operational cost and returns of the furniture industry.

In handling these challenges, he said the National Timber Industry Policy (NATIP) had underlined various strategies to transform the wood-based industry including the furniture sector. The policy aims to reduce the export of timber, sawn-timber and plywood to 40% and at the same time increase the export of value-added products such as furniture and construction components to 60% by 2020.

In line with this, FRIM was tasked to lead the Third Main Committee which focuses on innovation and technology. This committee among others, aimed to produce new value-added products including furniture through research and development programmes.

Dato Sri Douglas elaborated that the current global market scenario is "green product" centric. Hence, the establishment of a sustainable and environmental friendly furniture manufacturing industry is imperative. Aspects

like 'zero or low formaldehyde emission' and 'Life Cycle Analysis' warrant serious attention in ensuring continuous environmental protection.

In the context of Sarawak, he emphasised that the state which is rich in forest resources has huge potential in wooden furniture manufacturing and export. However, in 2010, Sarawak contributed only 3% out of the national export value for furniture. This figure is considered negligible as compared with the Peninsular Malaysia and Sabah who contributed 74% and 13% respectively.

Describing this seminar as timely, he said it could boost the morale of the furniture entrepreneurs particularly in Sarawak to implement and integrate research and development in order to produce value-added products according to international standards. Besides, it helps to expedite technology transfer among the industry players.

According to him, the government through STIDC had concerted the efforts by establishing various furniture industrial complexes towards strengthening the furniture industry in order to be highly competitive either at the local or global markets. He urged the Sarawak furniture entrepreneurs to focus on producing value-added products for niche market besides optimising the utilisation of alternative raw material like Acacia mangium as it could fetch a high export value and to complement the raw materials from natural forests.

He added that the signing of MoU between FRIM, UNIMAS and STIDC is poised to strengthen the furniture industry in Sarawak. Under the MoU, the three entities will

establish a Furniture Testing Laboratory and to intensify the furniture industry in Sarawak. FRIM will provide technical advisory services on lab specification, tools and training. Gradually, this lab will be developed into a Furniture Excellent Centre in order to serve as a reference centre for industry players, researchers and students. UNIMAS will initiate a programme on designing based on the local ethnic motifs and innovation. STIDC on the other hand will play its role in developing the infrastructure.

The minister was confident that the close co-operation between the three bodies through this MoU will definitely benefit the local furniture industry in producing the furniture products according to international requirements and specifications. The efforts to transform the local furniture industry through technology transfer are parallel with the government's intention to integrate this sector, he said.

"More interaction of this nature is needed by the industry players including the Sarawak Furniture Industry Association, Sarawak Timber Association as well as the related agencies in enhancing the understanding on the current requirements and needs of the stake-holders. It is hoped that this seminar would chart a strategic direction towards a sustainable furniture industry in Sarawak. FRIM, UNIMAS, MITI and STIDC also plan to organise several workshops on furniture industry in the near future. Hopefully, these efforts will further strengthen the value-chain of the furniture industry in Sarawak and will benefit the entire spectrum of the local wood-based industry" Dato Sri Douglas Uggah Embas, Natural Resources and Environment Minister.

#### **SUMMARY**

- The national export value of furniture in 2010 was RM7.96 billion compared with RM5.09 billion in 2001
- The government through STIDC had concerted the efforts towards strengthening the furniture industry in order to be highly competitive either at the local or global markets
- MoU between FRIM, UNIMAS and STIDC is poised to strengthen the furniture industry in Sarawak

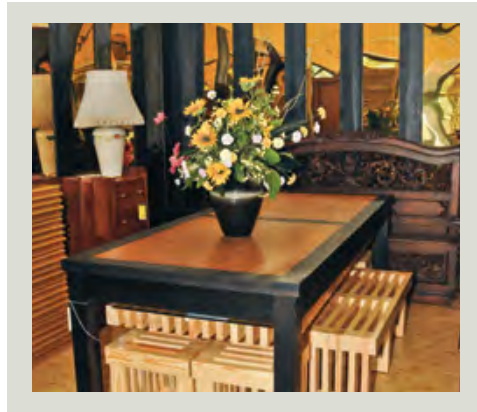
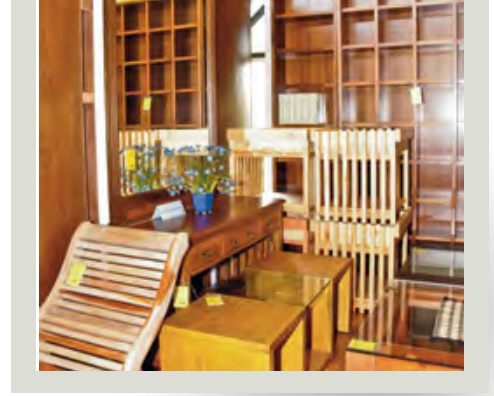
# FURNITURE INDUSTRY DEVELOPMENT SEMINAR

New dimension  
for the furniture  
entrepreneurs in  
Sarawak

**W**ith 70% of its landmass covered with forests, Sarawak is blessed with abundant of natural resources particularly timber. Therefore, the state has the potential to become the furniture hub to cater for both the local and export markets.

In 2010, Sarawak's furniture sector contributed only 3% out of RM8 billion of the national export revenue. This is despite the fact that Malaysia ranks number ten in the world in terms of furniture export. The export products from Sarawak were mostly garden furniture.

In order to leverage the Sarawak's furniture sector, the Sarawak Furniture Industry Development Seminar was jointly organised by the Forest Research Institute Malaysia (FRIM), Universiti Malaysia Sarawak (UNIMAS) and STIDC on 14<sup>th</sup>-15<sup>th</sup> February in Kuching, Sarawak.



The seminar aimed to provide the platform for deliberation, co-operation and sharing of ideas to further develop the furniture sector in Sarawak. It also provided the latest information on furniture making technology and research as well as the potential of raw materials from planted forest.

In ensuring the success of this industry, STIDC General Manager, Datu Haji Sarudu Haji Hoklai said STIDC would continue to formulate a sustainable enhancement plan through strategic alliance with the related agencies of the state and federal governments including FRIM and UNIMAS.

According to him, these agencies make ideal partners due to their respective strength with STIDC monitoring the raw materials as well as implementing the furniture vendor development programme and developing the furniture complexes in Sarawak. While FRIM specialises on wood-

based products research and development, UNIMAS on the other hand has the furniture designing technology.

He added that this strategic alliance had identified key areas of collaboration taking advantage of Sarawak's potential due to sustainable supply of raw materials to become the global player. The potential areas of collaboration include the organisation of seminar on the development of Sarawak's furniture industry, the development of furniture testing lab, product development as well as promotional and marketing programmes.

The seminar saw the presentation of 14 papers covering topics on the trends and challenges faced by the furniture industry, the constraints of furniture exports, the importance of designing and testing requirements, the raw material supply as well as the financial and incentive supports available.

A memorandum of understanding was also signed between the three agencies for collaboration in furniture designing and development, training, technical services and the establishment of a furniture testing laboratory.

#### SUMMARY

- Sarawak has the potential to become the furniture hub to cater for both the local and export markets
- STIDC would continue to formulate a sustainable enhancement plan through strategic alliance with the related agencies of the state and federal governments
- This strategic alliance had identified key areas of collaboration taking advantage of Sarawak's potential due to sustainable supply of raw materials to become the global player

“It is hoped that the synergy between the state and federal government agencies would pave the way for new opportunities and provide new dimension for the furniture entrepreneurs in Sarawak to forge ahead” STIDC General Manager, Datu Haji Sarudu Haji Hoklai.





# SMART PARTNERSHIP

Demonstrates a complete value chain in the development of the furniture industry in Sarawak



**T**he furniture Industry players must strive for continuous improvement amid the challenging and robust scenario in the industrial sector by enhancing the quality of services as well as the furniture products designing. To remain relevant, they should also ensure that there is perpetual newness in this sector in tandem with the global situation, Deputy Vice Chancellor (Research and Innovation) of Universiti Malaysia Sarawak (UNIMAS), Prof. Dr Peter Songan said in conjunction with the launching of the Sarawak Furniture Industry Seminar on 14<sup>th</sup> February 2012 at a leading hotel in Kuching, Sarawak.

This seminar reflects the initiative in catalysing and encouraging the human capital development among the furniture

entrepreneurs in Sarawak to produce high quality furniture. UNIMAS had identified the Industrial Design as one of the research niche areas which provides opportunities for training and skill development in designing besides giving exposure on designing process and management, technology and commercialization. Furniture designing R&D services are also available for the local industry players. Plans are also underway to develop knowledgeable, skilled and strategic minded workforce to enhance the value of human resources in order to remain relevant with the current environment and future challenges, he added.

“The smart partnership between FRIM, UNIMAS and STIDC demonstrates a complete value chain in the development of the furniture industry in Sarawak. This augurs well with the dynamic transformation of the wood-based sector in Malaysia which

is vital to the national economy” Prof. Dr Peter Songan said.



According to him, the participants stand to gain from this seminar in terms of knowledge, skill and technological know-how which will eventually lead to the formation of a highly competitive and innovative furniture entrepreneurial community. This will ensure that the furniture sector move in pace with the global technology which is changing rapidly aside from sustaining the national furniture export.

## SUMMARY

- The furniture Industry players must strive for continuous improvement amid the challenging and robust scenario in the industrial sector
- This seminar reflects the initiative in catalysing and encouraging the human capital development among the furniture entrepreneurs in Sarawak to produce high quality furniture
- The participants stand to gain from this seminar in terms of knowledge, skill and technological know-how



# TIMELY INITIATIVE

**STIDC's initiative  
in establishing the  
Furniture Testing  
Laboratory in Sarawak  
is appropriate and  
timely**

“It is hoped that the smart partnership between FRIM, UNIMAS and STIDC would become the impetus to leverage the Sarawak's furniture industry in producing the down-stream value-added products and remain at the competitive edge” the Honourable Hajjah Nancy Haji Shukri





- STIDC General Manager, Datu Haji Sarudu Haji Hoklai (right) briefing the Natural Resources and Environment Minister, the Honourable Dato Sri Douglas Uggah Embas (middle) and the Malaysian Forestry Research and Development Board Chairman, the Honourable Hajjah Nancy Haji Shukri (2<sup>nd</sup> right) at the furniture exhibition. Also seen is the STIDC Deputy General Manager, Tuan Haji Hashim Haji Bojet (left)

**M**alaysian Forestry Research and Development Board (MFRDB) Chairperson, the Honourable Hajjah Nancy Haji Shukri described the STIDC's initiative in establishing the Furniture Testing Laboratory in Sarawak as appropriate and timely. Speaking at the launching of the Sarawak Furniture Industry Development Seminar 2012, she expressed optimism that the synergy between FRIM, UNIMAS and STIDC is poised to create new expertise in furniture testing to help the local furniture industry producing the furniture products and meeting the international specifications and requirements. In the long run, she said this lab would become the furniture reference centre for industry players, researchers and students and eventually help to produce the furniture products according to international standards.

With the signing of the Memorandum of Understanding between FRIM, UNIMAS

and STIDC, she believed that the STIDC's objective in establishing the Furniture Testing Laboratory in Sarawak would soon be a reality. The laboratory, which will be the first in the state will facilitate the local furniture entrepreneurs in manufacturing the furniture products according to the standard requirements and compete in the global arena.

It is hoped that this seminar would foster a closer relationship between the relevant agencies in Peninsular Malaysia and Sarawak in realisation of the government's aspiration to transform the furniture industry in Sarawak, she said. Towards that end, she stressed that the support of the entities like FRIM, UNIMAS, STIDC as well as the furniture associations particularly in Sarawak are imperative. Through this seminar, issues related to raw materials, wooden furniture designing, challenges in the furniture sector, finance as well as incentives would be addressed, she added.

The Honourable Hajjah Nancy opined that the interaction and meeting of this nature ought to be intensified in order to understand and meet the current needs and demands of the consumers. She also hoped that this seminar would conclude with a strategic direction towards sustaining the furniture industry particularly in Sarawak.

#### **SUMMARY**

- The synergy between FRIM, UNIMAS and STIDC is poised to create new expertise in furniture testing
- To transform the furniture industry in Sarawak, the support of the local related entities are imperative
- The interaction and meeting of this nature ought to be intensified in order to understand and meet the current needs and demands of the consumers

# 2011

JANUARY-DECEMBER

## market performance



### EXPORT VALUE OF LOGS & TIMBER PRODUCTS

The value of log and timber products exported for 2011 decreased by 4% worth RM7.09 billion compared to the same period last year at RM7.35 billion.

There were decreased in the overall values of logs and timber products exported. Respective decreases in export value were that of logs (6%), sawn timber (16%), plywood (0.5%), veneer (5%), moulding (27%), dowel (24%) and woodchips (18%) from January to December 2011 compared to the corresponding period in 2010. Despite the decrease in values exported of all timber products, there were respective increases in the value of laminated board/flooring (37%), fibreboard (0.43%), blockboard (0.33%) and particle board (35%).

Plywood remained the major contributor accounting for 54% @ RM3.8 billion of the total export value, with logs (26% @ RM1.8 billion) and sawntimber (10% @ RM0.7 billion) as second and third place respectively. **(Table 1)**



**LOGS** • The volume of log exported for 2011 decreased by 22% to 3.1 million m<sup>3</sup> from 3.9 million m<sup>3</sup> and the value decreased by 6% to RM1.84 billion from RM1.96 billion compared to the same period of last year.

India remained the largest buyer of the State's logs by purchasing 1.9 million m<sup>3</sup> of the overall volume exported valued at RM1.1 billion followed by Taiwan (0.401 million m<sup>3</sup>, RM245 million) and China (0.312 million m<sup>3</sup>, RM169 million). India was still the largest importer of log in 2011 however they had decreased their purchased by 16% compared to similar period in 2010 followed by Taiwan (16%) and China (47%) respectively.

Export of logs to major buyers like India, Taiwan and China constituted 84% of the total export volumes and also contributed 86% to the total export values of logs from January to December 2011.

Average FOB unit value of logs increased by 20% from RM497 to RM597 for 2011 compared to similar period in 2010. **(Table 2)**





**SAWN TIMBER** • Volume and value of sawn timber exported for 2011 decreased by 19% to 0.73 million m<sup>3</sup> from 0.91 million m<sup>3</sup> and the value decreased by 10% to RM693 million from RM822 million compared to that of similar period in 2010.

Thailand remained the number one importer of the State's sawn timber, by purchasing 32% of the overall volume at 0.24 million m<sup>3</sup> and valued at RM220 million followed by Philippines (0.115 million m<sup>3</sup> @ RM42 million) and Middle East (0.111 million m<sup>3</sup> and @ RM130 million) respectively.

The volume of sawntimber exported to Thailand decreased by 8% from 0.26 million m<sup>3</sup> to 0.24 million m<sup>3</sup>, followed by Philippines (increased by 4% from 0.111 million m<sup>3</sup> to 0.114 million m<sup>3</sup>) and Middle East (decreased by 36% from 0.173 million m<sup>3</sup> to 0.111 million m<sup>3</sup>).

Export of sawntimber to major buyers like Thailand, Philippines and Middle East constituted 63% of the total export volumes and contributed 60% to the total export values of logs from January to December 2011.

Average FOB unit value of sawntimber increased by 4% from RM908 to RM948 for 2011 compared to similar period in 2010. **(Table 3)**

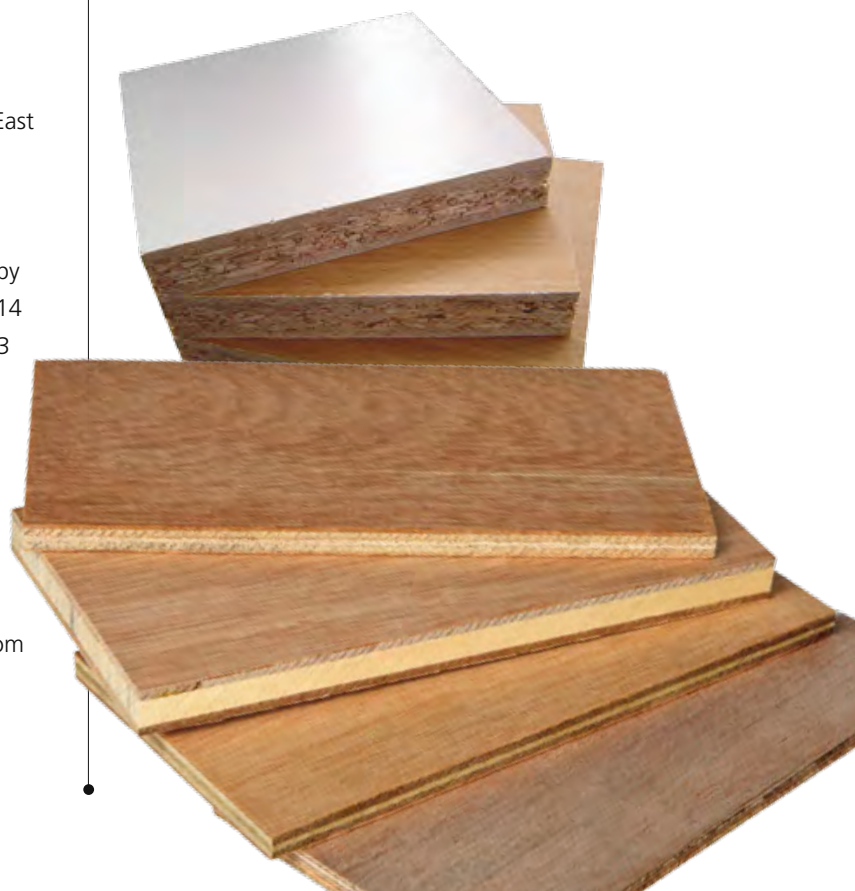
**PLYWOOD** • Export volume of plywood for 2011 decreased by 19% to 2.3 million m<sup>3</sup> from 2.8 million m<sup>3</sup> in the same period in 2010. Plywood sales amounting to RM3.8 billion contributed 54% to the overall total of timber and timber products export revenues for the period.

Japan maintained its position as the number one buyer of plywood with the purchase of 1.3 million m<sup>3</sup> or 58% of the volume exported valued at RM3.8 billion. Other major plywood importers are Korea making a purchase of 11% at 0.24 million m<sup>3</sup> with the value RM324 million and Taiwan (10% at 0.225 million m<sup>3</sup> @ RM311 million), in which they contributed RM3.0 billion to the overall volumes of plywood exported for the period.

The volume of plywood exported to Japan increased by 5% from 1.2 million m<sup>3</sup> to 1.3 million m<sup>3</sup> followed by Korea (decreased by 53% from 0.51 million m<sup>3</sup> to 0.24 million m<sup>3</sup>) and Taiwan (decreased by 22% from 0.29 million m<sup>3</sup> to 0.23 million m<sup>3</sup>).

Export of plywood to major buyers like Japan, Korea and Taiwan constituted 78% of the overall exported volumes and contributed 79% to the overall revenues for 2011.

Average FOB unit value of plywood increased by 23% from RM1,363 to RM1,673 for 2011 compared to similar period in 2010. **(Table 4)**





## OTHER TIMBER PRODUCTS •

Other timber products includes veneer, dowels, moulding, particleboard, fibreboard, block board, laminated board, woodchip and other timber products (mention in Table 1). Value of export of these products was at RM0.75 billion accounted for 11% of the overall value of the timber and timber products exported from January to December 2011.



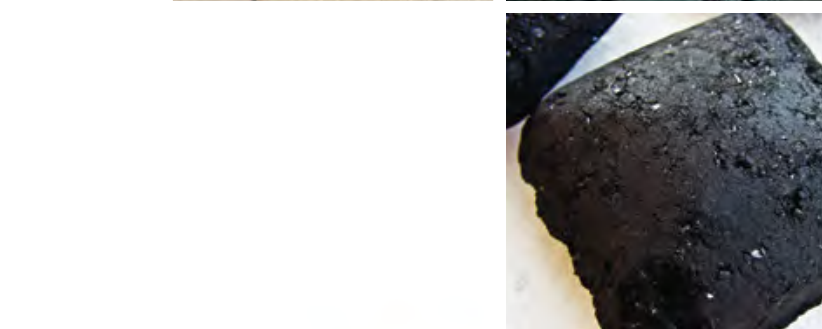
Respective decreases in export volumes were that of veneer (23%), moulding (31%), dowel (29%), fibreboard (8%), blockboard (5%) and woodchips (24%). In spite of the overall decrease in export volume, there were an increase for laminated board (21%), and particle board (19%) in the January to December 2011 compared to the corresponding period in 2010. **(Table 5, 6, 7, 8, & 9)**



## FUTURE OUTLOOK •

The future outlook for the Malaysian timber industry in 2012 remains uncertain as prices of timber and timber products remain weak as compared to last year performance. (Source: ITTO).

According to some analysts that, this could be attributed to slow recovery in housing construction sector in Japan after earthquake-Tsunami last year. The situation is further aggravated by slowdown in the global economy resulting in trade deficit and fuel import rise up. This could weigh on timber prices and timber companies earnings and this probably continue until 2013. (Source: Borneo Post) The world economic is predicted to grow moderately, assuming that Europe market will not collapse due to its financial crisis. Therefore, the timber industries should be better prepared to grow in consonance with the growth of the world economy.



# trade statistics

## sarawak

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

PRODUCTS	2011 <sup>a</sup> January - December			2010 <sup>e</sup> January - December			% 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	3,089,713	1,844,306	26.03	3,943,117	1,959,865	26.65	(21.64)	(5.90)
SAWNTIMBER	731,666	693,380	9.79	905,880	822,420	11.18	(19.23)	(15.69)
PLYWOOD	2,267,156	3,794,761	53.56	2,796,522	3,812,874	51.85	(18.93)	(0.48)
VENEER	204,544	235,031	3.32	265,116	247,177	3.36	(22.85)	(4.91)
LAMINATED BOARD / FLOORING	21,024	49,844	0.70	17,325	36,315	0.49	21.35	37.25
MOULDING	6,323	14,417	0.20	9,124	19,767	0.27	(30.70)	(27.07)
DOWEL	1,139	3,899	0.06	1,596	5,144	0.07	(28.67)	(24.20)
FIBREBOARD	190,290	252,129	3.56	206,862	251,050	3.41	(8.01)	0.43
BLOCKBOARD	1,122	1,231	0.02	1,175	1,227	0.02	(4.54)	0.33
PARTICLE BOARD	107,956	55,855	0.79	90,393	41,373	0.56	19.43	35.00
OTHER PRODUCTS	77,205	116,416	1.64	83,969	127,623	1.74	(8.05)	(8.78)
WOODCHIP [Tonne]	158,338	24,092	0.34	209,303	29,506	0.40	(24.35)	(18.35)
<b>TOTAL (M<sup>3</sup>) (RM)</b>	<b>6,698,139</b>	<b>7,085,361</b>	<b>100</b>	<b>8,321,078</b>	<b>7,354,341</b>	<b>100</b>	<b>(19.50)</b>	<b>(3.66)</b>

**\*OTHER TIMBER PRODUCTS:**

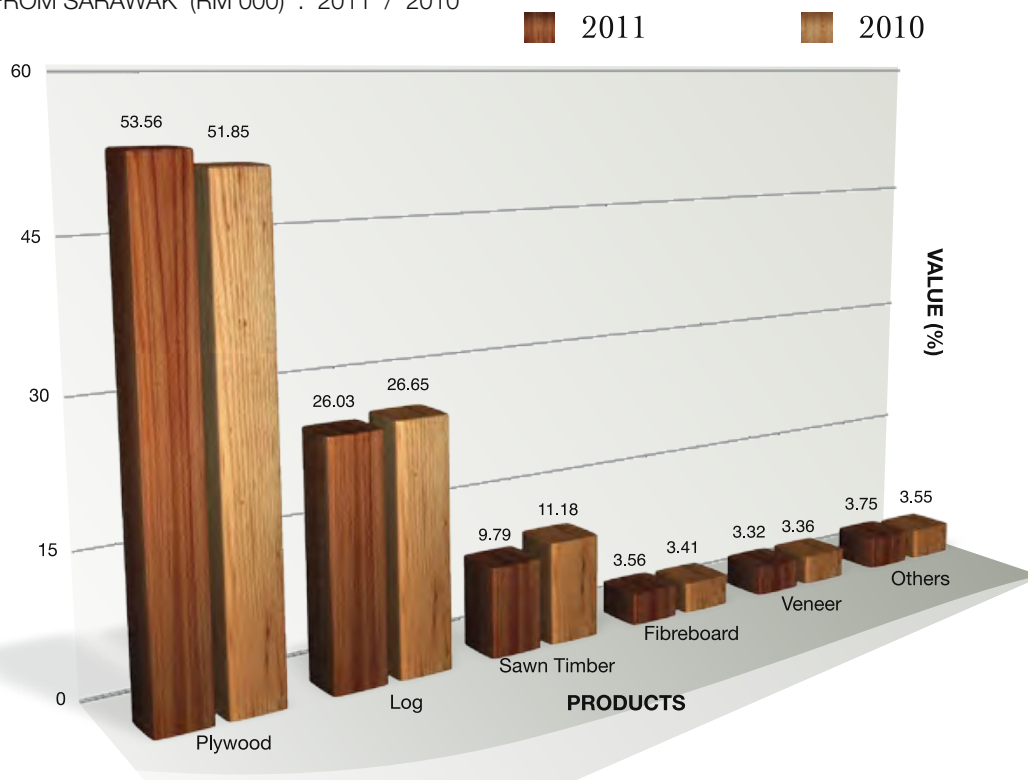
- Chopping board
- Densified wood
- Door & door frames
- Finger jointed
- Furniture and furniture parts
- Laminated beam
- Laminated post
- Laminated Veneer Lumber (LVL)
- Parquet flooring
- Railways sleepers
- Wooden fences
- Wooden gates
- Wooden pallet
- Wooden pegs & stakes
- Wooden pellet

Notes:

- Fibreboard include MDF and HDF
- Total of volume (m3) does not includes woodchips (tonne)
- a = annual & total include application/permit to transport goods within the Federation [Customs Declaration Form No.3 (CDF3)]
- e = estimate & uncheck data; 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

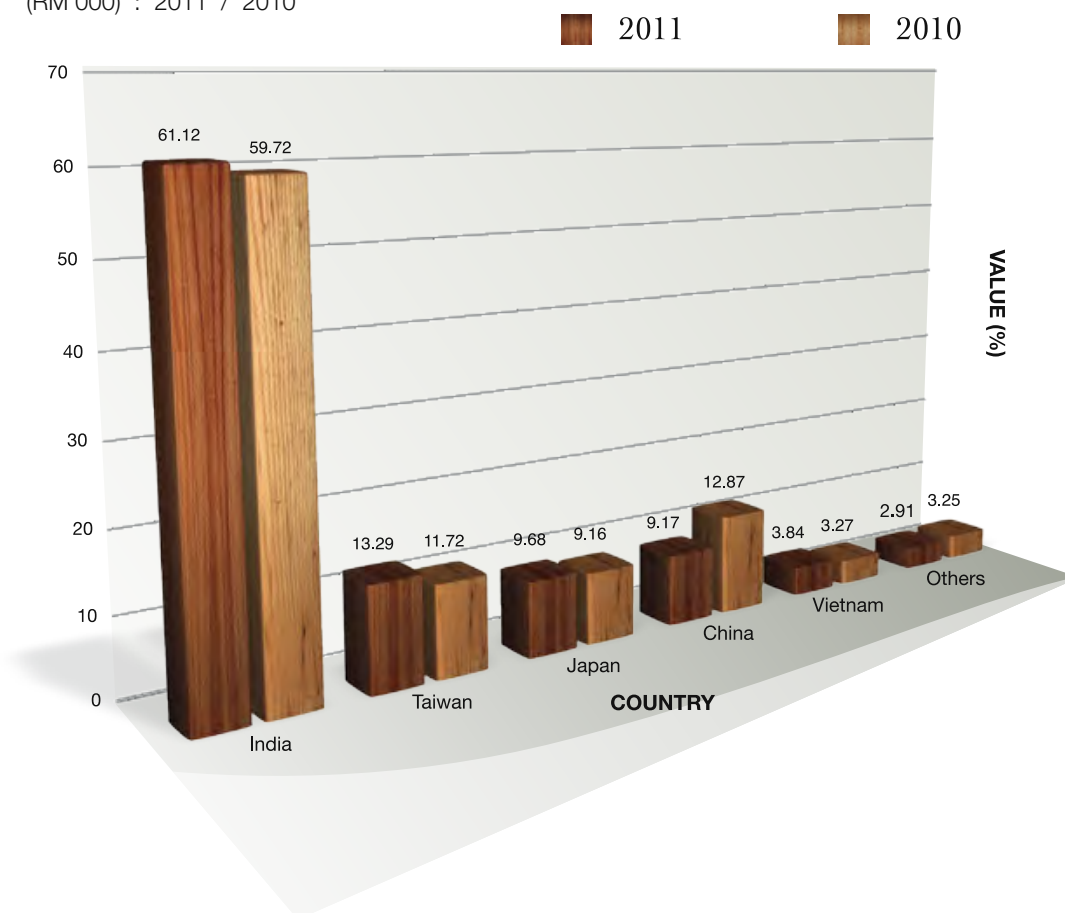


**TABLE 2.** EXPORT OF LOG BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 <sup>e</sup> January - December			2010 <sup>e</sup> January - December			% 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
INDIA	1,862,477	1,127,209	61.12	2,205,150	1,170,379	59.72	(15.54)	(3.69)
TAIWAN	401,477	245,050	13.29	477,145	229,756	11.72	(15.86)	6.66
CHINA	312,689	169,061	9.17	587,327	252,320	12.87	(46.76)	(33.00)
JAPAN	266,055	178,613	9.68	370,285	179,553	9.16	(28.15)	(0.52)
VIETNAM	159,602	70,761	3.84	175,478	64,149	3.27	(9.05)	10.31
KOREA	46,449	25,760	1.40	73,175	32,621	1.66	(36.52)	(21.03)
THAILAND	29,741	22,345	1.21	46,745	26,794	1.37	(36.38)	(16.60)
PHILIPPINES	5,714	2,666	0.14	-	-	-	100.00	100.00
INDONESIA	3,956	914	0.05	-	-	-	100.00	100.00
PAKISTAN	1,553	1,927	0.10	2,677	2,755	0.14	(41.98)	(30.05)
within MALAYSIA (Peninsular & Sabah)	-	-	-	5,137	1,538	0.08	(100.00)	(100.00)
<b>TOTAL</b>	<b>3,089,713</b>	<b>1,844,306</b>	<b>100</b>	<b>3,943,117</b>	<b>1,959,865</b>	<b>100</b>	<b>(21.64)</b>	<b>(5.90)</b>

**EXPORT VALUE OF LOG TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



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

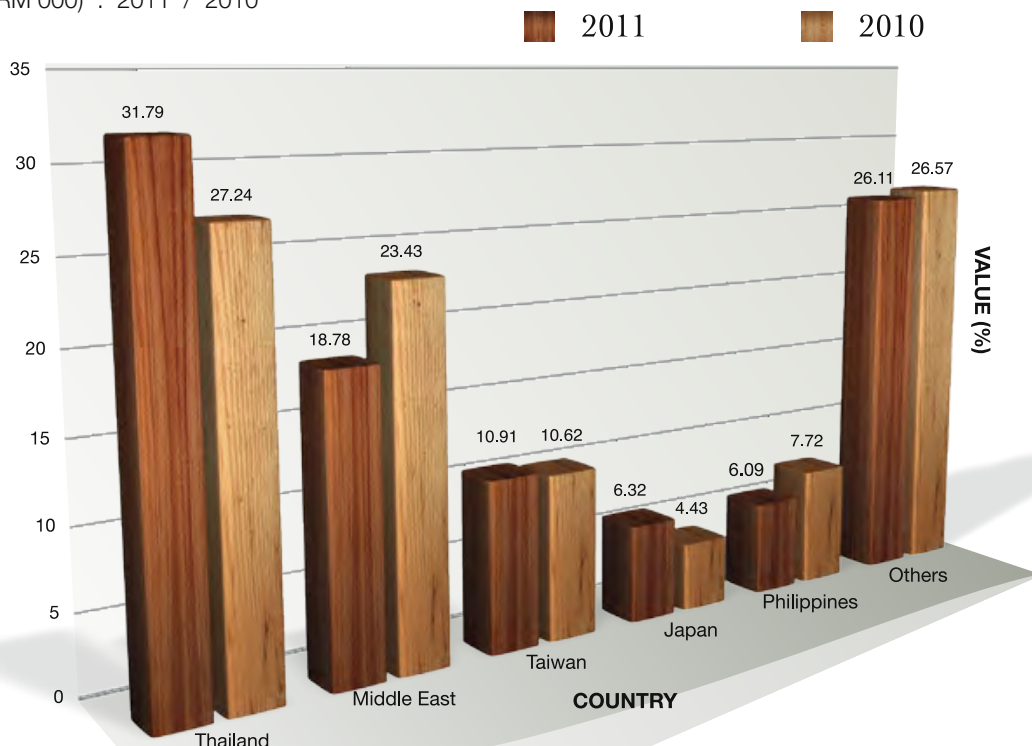
DESTINATIONS	2011* January - December			2010* January - December			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
THAILAND	235,995	220,457	31.79	256,693	224,001	27.24	(8.06)	(1.58)
PHILIPPINES	114,993	42,206	6.09	110,626	63,466	7.72	3.95	(33.50)
MIDDLE EAST	110,675	130,217	18.78	172,724	192,707	23.43	(35.92)	(32.43)
TAIWAN	80,179	75,638	10.91	114,477	87,312	10.62	(29.96)	(13.37)
KOREA	35,963	38,073	5.49	37,672	34,692	4.22	(4.54)	9.75
CHINA	35,025	32,869	4.74	52,009	47,428	5.77	(32.66)	(30.70)
SINGAPORE	34,800	39,330	5.67	40,885	40,691	4.95	(14.88)	(3.34)
JAPAN	25,503	43,824	6.32	24,673	36,425	4.43	3.36	20.31
SRI LANKA	16,854	20,281	2.92	5,901	7,249	0.88	185.62	179.78
SOUTH AFRICA	13,692	15,455	2.23	21,237	23,234	2.83	(35.53)	(33.48)
OTHERS*	27,988	35,030	5.05	68,983	65,215	7.93	(59.43)	(46.29)
<b>TOTAL</b>	<b>731,666</b>	<b>693,380</b>	<b>100</b>	<b>905,880</b>	<b>822,420</b>	<b>100</b>	<b>(19.23)</b>	<b>(15.69)</b>

**\*OTHER DESTINATION:**

- AUSTRALIA
- BELGIUM
- BRUNEI
- DENMARK
- FRANCE
- GERMANY
- HONG KONG
- INDIA
- INDONESIA
- MACEDONIA
- MALDIVES
- MAURITIUS
- NETHERLANDS
- NEW ZEALAND
- REUNION
- RUSSIA
- SEYCHELLES
- TIMOR-LESTE
- UNITED KINGDOM
- UNITED STATES
- VIETNAM
- within MALAYSIA (Peninsular & Sabah)

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

(RM'000) : 2011 / 2010





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

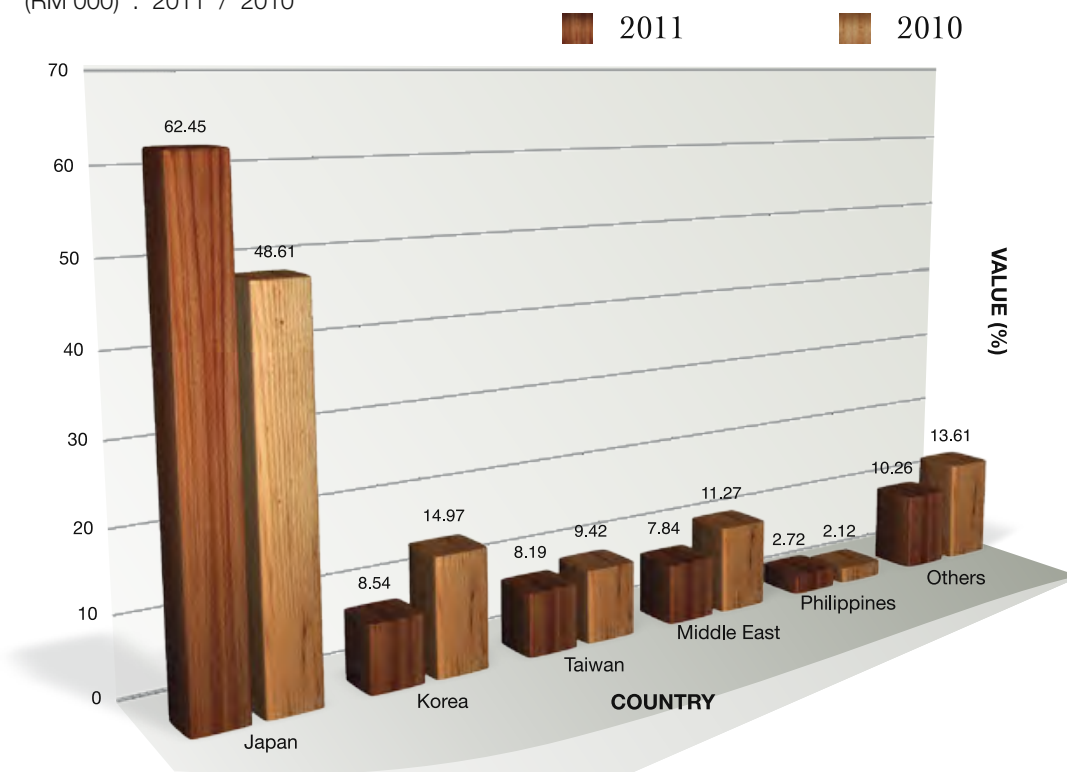
DESTINATIONS	2011 <sup>e</sup> January - December			2010 <sup>e</sup> January - December			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
JAPAN	1,307,042	2,369,847	62.45	1,245,661	1,853,303	48.61	4.93	27.87
KOREA	239,950	324,099	8.54	512,299	570,808	14.97	(53.16)	(43.22)
TAIWAN	225,202	310,645	8.19	287,927	358,998	9.42	(21.78)	(13.47)
MIDDLE EAST	210,770	297,548	7.84	338,578	429,833	11.27	(37.75)	(30.78)
PHILIPPINES	61,619	103,301	2.72	55,541	80,857	2.12	10.94	27.76
CHINA	48,419	97,211	2.56	60,285	86,830	2.28	(19.68)	11.96
UNITED STATES	44,076	86,360	2.28	68,966	118,502	3.11	(36.09)	(27.12)
HONG KONG	37,599	52,750	1.39	50,109	63,714	1.67	(24.97)	(17.21)
AUSTRALIA	21,062	46,561	1.23	31,031	59,388	1.56	(32.13)	(21.60)
SINGAPORE	18,005	22,620	0.60	25,309	29,363	0.77	(28.86)	(22.96)
OTHERS*	53,413	83,819	2.21	120,815	161,278	4.23	(55.79)	(48.03)
<b>TOTAL</b>	<b>2,267,156</b>	<b>3,794,761</b>	<b>100</b>	<b>2,796,522</b>	<b>3,812,874</b>	<b>100</b>	<b>(18.93)</b>	<b>(0.48)</b>

**\*OTHER DESTINATION:**

- BELGIUM
- BRUNEI
- CANADA
- COTE D'IVOIRE
- CYPRUS
- DOMINICAN REPUBLIC
- GERMANY
- INDIA
- INDONESIA
- IRELAND
- ITALY
- LIBERIA
- MALDIVES
- MALTA
- MAURITIUS
- MEXICO
- NETHERLANDS
- NEW ZEALAND
- NORTHERN MARIANA ISLANDS
- RUSSIA
- SOUTH AFRICA
- SRI LANKA
- THAILAND
- UNITED KINGDOM
- VIETNAM
- within MALAYSIA (Peninsular & Sabah)

**EXPORT VALUE OF PLYWOOD TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



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

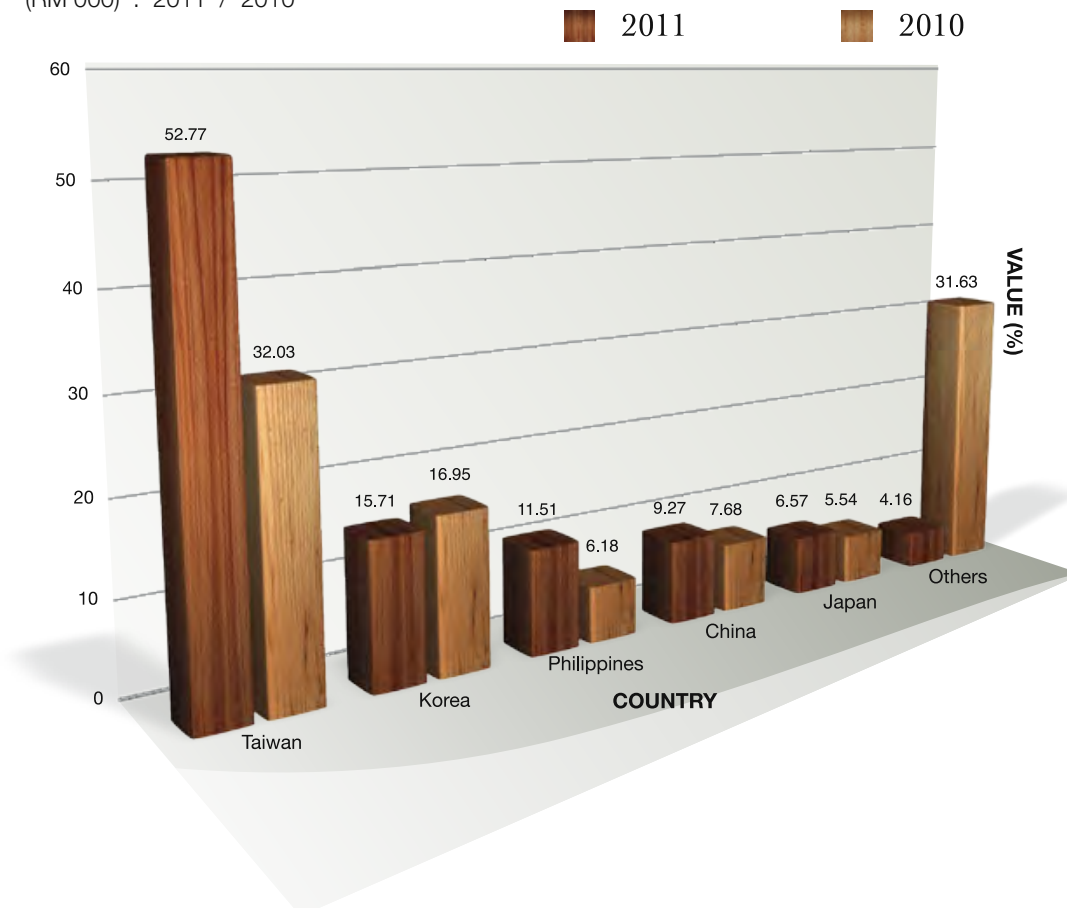
DESTINATIONS	2011 <sup>e</sup> January - December			2010 <sup>e</sup> January - December			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
TAIWAN	109,606	124,028	52.77	83,772	79,182	32.03	30.84	56.64
KOREA	34,306	36,916	15.71	47,516	41,891	16.95	(27.80)	(11.88)
CHINA	25,068	21,799	9.27	23,570	18,972	7.68	6.36	14.90
PHILIPPINES	23,242	27,047	11.51	13,117	15,264	6.18	77.20	77.19
JAPAN	9,185	15,453	6.57	8,620	13,698	5.54	6.55	12.81
AUSTRALIA	2,485	8,967	3.82	1,421	6,921	2.80	74.80	29.56
THAILAND	515	664	0.28	2,542	1,598	0.65	(79.74)	(58.45)
SINGAPORE	88	65	0.03	115	85	0.03	(23.38)	(23.53)
SRI LANKA	35	84	0.04	31	57	0.02	12.47	47.37
VIETNAM	14	8	0.00	-	-	-	100.00	100.00
OTHERS*	-	-	-	84,411	69,509	28.12	(100.00)	(100.00)
<b>TOTAL</b>	<b>204,544</b>	<b>235,031</b>	<b>100</b>	<b>265,116</b>	<b>247,177</b>	<b>100</b>	<b>77.29</b>	<b>144.62</b>

**\*OTHER DESTINATION:**

- FINLAND
- within MALAYSIA (Peninsular & Sabah)

**EXPORT VALUE OF VENEER TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010

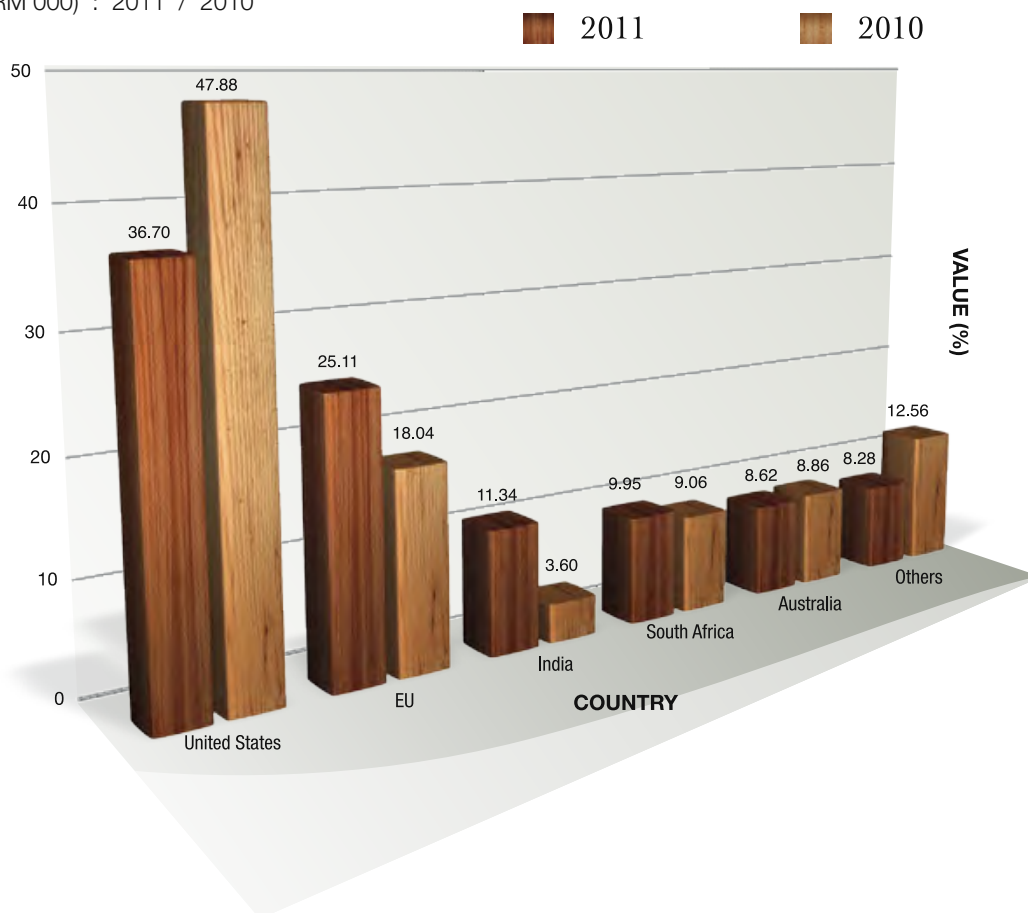


**TABLE 6.** EXPORT OF DOWEL BY COUNTRY OF DESTINATIONS

DESTINATIONS	2011 <sup>e</sup> January - December			2010 <sup>e</sup> January - December			% 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
UNITED STATES	385	1,431	36.70	684	2,463	47.88	(43.69)	(41.90)
EU	265	979	25.11	220	928	18.04	20.10	5.50
AUSTRALIA	139	336	8.62	217	456	8.86	(36.10)	(26.32)
SOUTH AFRICA	138	388	9.95	160	466	9.06	(13.86)	(16.74)
INDIA	116	442	11.34	53	185	3.60	120.13	138.92
SWITZERLAND	49	189	4.85	49	202	3.93	0.37	(6.44)
JAPAN	43	115	2.95	58	198	3.85	(26.95)	(41.92)
CANADA	5	19	0.49	33	110	2.14	(84.65)	(82.73)
TAIWAN	-	-	-	75	122	2.37	(100.00)	(100.00)
MIDDLE EAST	-	-	-	47	14	0.27	(100.00)	(100.00)
<b>TOTAL</b>	<b>1,139</b>	<b>3,899</b>	<b>100</b>	<b>1,596</b>	<b>5,144</b>	<b>100</b>	<b>(28.67)</b>	<b>(24.20)</b>

**EXPORT VALUE OF DOWEL TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



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

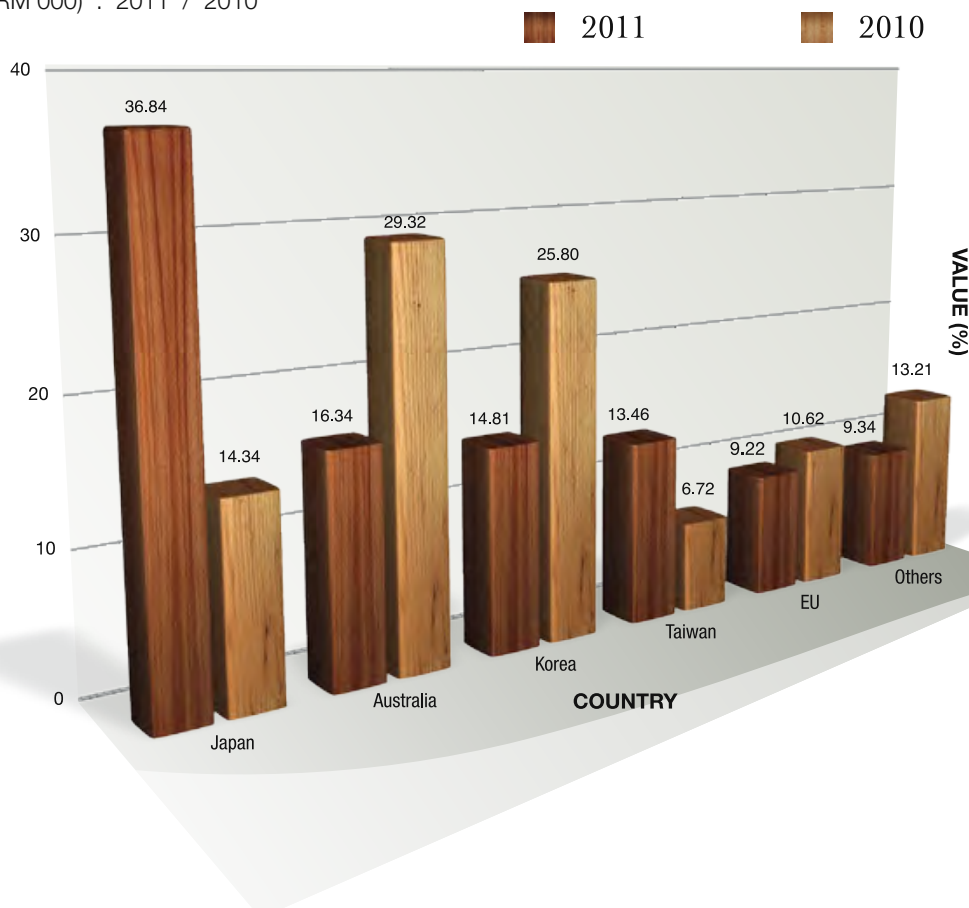
DESTINATIONS	2011* January - December			2010* January - December			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
JAPAN	2,582	5,311	36.84	1,497	2,834	14.34	72.45	87.40
KOREA	992	2,135	14.81	2,959	5,099	25.80	(66.46)	(58.13)
AUSTRALIA	983	2,356	16.34	2,173	5,795	29.32	(54.77)	(59.34)
TAIWAN	682	1,940	13.46	520	1,329	6.72	31.13	45.97
EU	561	1,329	9.22	901	2,099	10.62	(37.68)	(36.68)
SINGAPORE	127	145	1.01	151	276	1.40	(16.21)	(47.46)
UNITED STATES	117	617	4.28	183	715	3.62	(35.97)	(13.71)
SEYCHELLES	84	59	0.41	31	28	0.14	175.20	110.71
CANADA	71	309	2.14	357	1,045	5.29	(80.19)	(70.43)
SOUTH AFRICA	42	75	0.52	130	230	1.16	(68.02)	(67.39)
OTHERS*	82	141	0.98	222	317	1.60	(63.25)	(55.52)
<b>TOTAL</b>	<b>6,323</b>	<b>14,417</b>	<b>100</b>	<b>9,124</b>	<b>19,767</b>	<b>100</b>	<b>(30.70)</b>	<b>(27.07)</b>

**\*OTHER DESTINATION:**

- CAMBODIA
- CHINA
- INDIA
- IRAQ
- MALDIVES
- MAURITIUS
- TURKEY

**EXPORT VALUE OF MOULDING TO MAJOR DESTINATIONS**

(RM'000) : 2011 / 2010



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

DESTINATIONS	2011 <sup>e</sup> January - December			2010 <sup>e</sup> January - December			% 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
JAPAN	146,168	208,229	82.59	137,500	187,847	74.82	6.30	10.85
INDONESIA	17,002	16,745	6.64	24,611	21,347	8.50	(30.92)	(21.56)
PHILIPPINES	8,775	8,359	3.32	9,655	7,836	3.12	(9.12)	6.67
TAIWAN	4,148	4,524	1.79	4,312	4,176	1.66	(3.79)	8.33
THAILAND	3,669	3,312	1.31	1,657	1,559	0.62	121.39	112.44
CHINA	2,123	2,196	0.87	2,890	2,822	1.12	(26.54)	(22.18)
VIETNAM	1,821	1,713	0.68	2,799	2,721	1.08	(34.95)	(37.05)
BRUNEI DARUSSALAM	1,797	1,631	0.65	3,753	3,523	1.40	(52.10)	(53.70)
NETHERLANDS	1,290	2,264	0.90	1,170	1,852	0.74	10.24	22.25
INDIA	1,041	681	0.27	1,714	1,072	0.43	(39.22)	(36.47)
OTHERS*	2,455	2,475	0.98	16,801	16,295	6.49	(85.39)	(84.81)
<b>TOTAL</b>	<b>190,290</b>	<b>252,129</b>	<b>100</b>	<b>206,862</b>	<b>251,050</b>	<b>100</b>	<b>(8.01)</b>	<b>0.43</b>

**\*OTHER DESTINATION:**

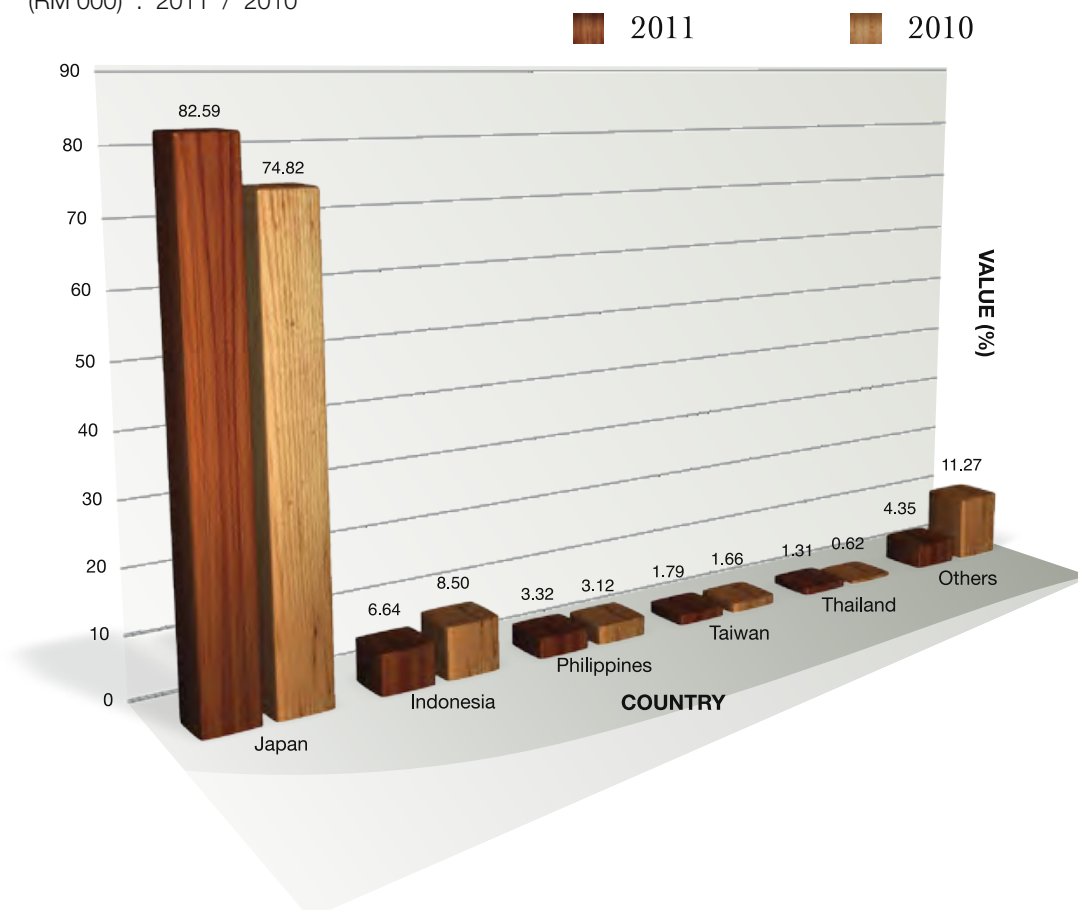
- AUSTRALIA
- KOREA
- NETHERLANDS
- SINGAPORE
- within MALAYSIA (Peninsular & Sabah)

## 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

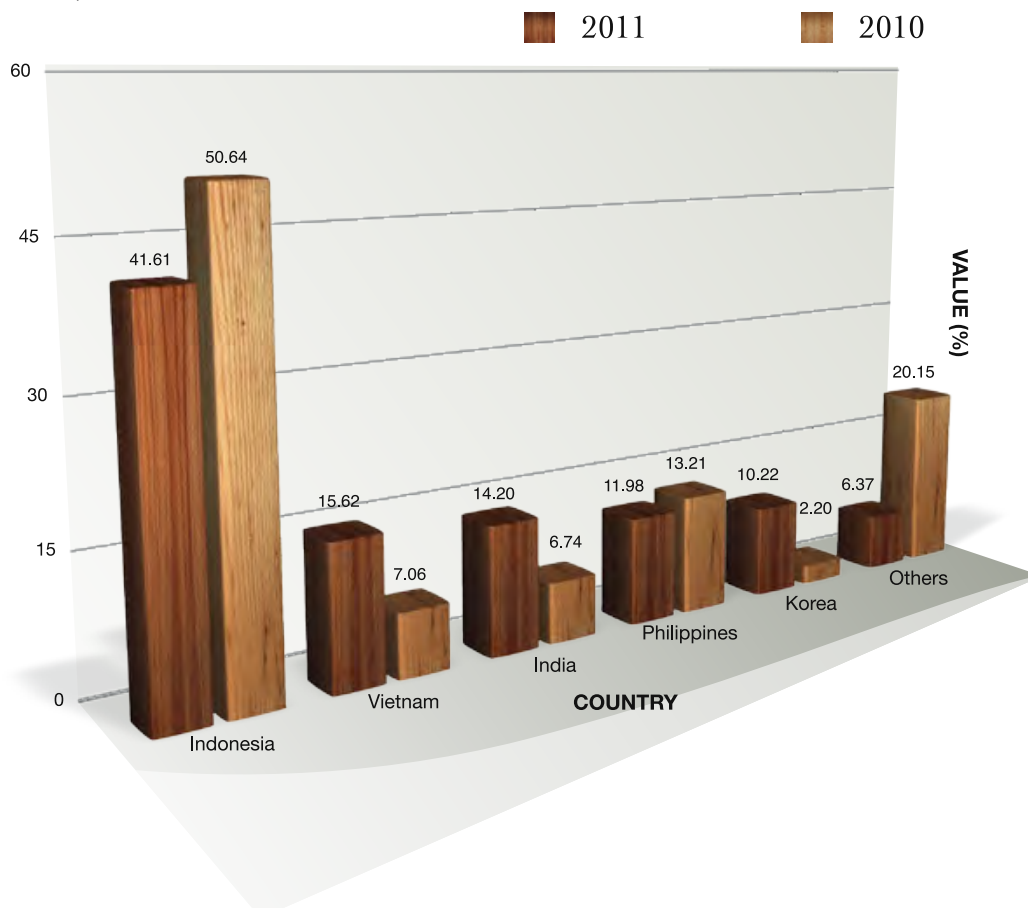
DESTINATIONS	2011* January - December			2010* January - December			% Change 2011 / 2010	
	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume (M <sup>3</sup> )	FOB Value (RM'000)	Value %	Volume	Value
INDONESIA	45,684	23,239	41.61	45,380	20,951	50.64	0.67	10.92
VIETNAM	17,997	8,726	15.62	6,299	2,919	7.06	185.73	198.94
INDIA	15,417	7,932	14.20	6,636	2,788	6.74	132.34	184.51
PHILIPPINES	12,453	6,694	11.98	11,102	5,465	13.21	12.16	22.49
KOREA	9,698	5,707	10.22	2,202	912	2.20	340.35	525.77
BRUNEI	2,512	1,264	2.26	214	104	0.25	1,072.12	1115.38
JAPAN	2,191	1,315	2.35	1,603	835	2.02	36.71	57.49
BANGLADESH	1,121	297	0.53	5,248	1,450	3.50	(78.64)	(79.52)
CHINA	884	681	1.22	3,506	2,030	4.91	(74.78)	(66.45)
within MALAYSIA (Peninsular & Sabah)	-	-	-	5,921	2,919	7.06	(100.00)	(100.00)
OTHERS*	-	-	-	2,282	1,000	2.42	(100.00)	(100.00)
<b>TOTAL</b>	<b>107,956</b>	<b>55,855</b>	<b>100</b>	<b>90,393</b>	<b>41,373</b>	<b>100</b>	<b>19.43</b>	<b>35.00</b>

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to us,  
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Utilising 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 utilised for a sustainable future.

**PERBADANAN KEMAJUAN PERUSAHAAN KAYU SARAWAK  
Sarawak Timber Industry Development Corporation (STIDC)**

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