

REPORT ON
WOODEN FURNITURE

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Wooden Furniture

Introduction

Household equipment designed for a variety of purposes. It may be made of wood, metal, plastics, marble, glass, fabrics, and related materials. It ranges from the simple pine chest or country chair to the elaborate marquetry-work cabinet or gilded console table. It is usually movable, though it can be built-in, as are kitchen cabinets and bookcases. It can either reveal or hide how it was constructed, and it can be highly stylized. The design and building of furniture are related to both architecture and interior design. Throughout history the functional and decorative aspects of furniture have been influenced by economics and fashion.

Historically, manufacturing furniture for exports had remained firmly in the hands of the industrialized

nations. Countries like China, Indonesia, Vietnam, Malaysia, Mexico and Brazil have gradually industrialized and expanded their furniture industry's operational scales better suited for the main markets, i.e. the United States and the European Union.

Product Profile

Pakistan has a long tradition in producing traditional style wooden furniture and well known because of its artistic work. This sector is highly fragmented with 85-95% of the manufacturing units.

Gujrat and Chiniot are the larger furniture manufacturing (traditional style) cities, followed by Karachi, Lahore, Sargodha, Rawalpindi and Peshawar (Sargodha because of Lacquer art work "SLLANWALI").

Clusters

Chiniot Cluster:	This cluster is well known for its master crafted furniture mainly carving. It's the main hub for producing wood carved furniture for Bedroom, Dining-room, Living-room, as well as Children and Kitchen. Over 3000 – 4000 manufacturing units exist in this cluster.
Gujrat Cluster:	Famous because of its solid wood furniture. Around 350 plus manufacturing units exist in the cluster.
Sargodha Cluster:	Famous for Lacquer Art "Sllanwali". Around 207 units exist.
Rawalpindi Cluster:	Around 2000 units exist in the city.
Peshawar Cluster:	More than 350 units, situated in Industrial Estate Peshawar, University Road, Tehkal, Kohat Road.
Clusters in Lahore:	Fortress, Stadium, Gulberg, Allama Iqbal Town, Ferozepur Road and Multan Road. These clusters basically traders of wooden furniture. There are more than 1,500 retail shops engaged in trading office, bedroom, living room, dining room and kitchen furniture.
Karachi:	More than 1500 units, situated in Manzoor Colony, Akhtar Colony, Patelpara, Liaqatabad, Ayshamanzil, Arambagh, Nursery, Liaquatabad and Manzoor Colony are some of the major furniture retail markets.

Types

- Household furniture for domestic and export markets,
- "Institutional" furniture segment for schools, hospitals and other public premises, and
- Private sector clients in shops, banks and hotels, etc.

Styles

- Antique,
- Mughal,
- Modern (Italian), &
- Oriental

Clusters Trend

Chiniot Cluster

As per statement of Mr. Danish Naeem Fakhri, President, Chiniot Chamber of Commerce & Industry, the Chiniot furniture sector is approximately 150 to 200 years old, but still it's a cottage sized. There are almost 3,000 to 4,000 manufacturing units (small) in Chiniot use primitive technology and techniques for manufacturing. Around 40,000 people are directly employed by this industry.



Chiniot is a major cluster engaged in the manufacturing of handmade wooden carved furniture. The basic raw material

used for hand carved furniture is Sheesham and Walnut wood.



The stakeholders in Chiniot can be categorized into manufacturers, craftsmen, traders, timber merchants. The semi-finished items (Kora) are sold to all major cities throughout Pakistan such as Lahore, Karachi, Rawalpindi, Peshawar and Mardan etc. No director export from this cluster is in practice.

Gujrat Cluster

Furniture industry of Gujrat is developing gradually and setting up of eye-catching showrooms on G.T Road and Gujrat By-pass is on increasing trend.

There are more than 400 units at Padda Market, Gujrat, Railway Road and Sargoda Road and over 8,000 persons are directly or indirectly involved with this sector. Solid wood (Rosewood and Walnut) is used in furniture manufacturing.



Handmade carved traditional furniture is in vogue, no mass scale production machinery/installations are available in the cluster, however, the cluster has the strength to meet and cope-up with all kinds of exporters orders. The quality of the wood used with hand carving and polish/finishing is unique.



The only problem I noticed there the stakeholders are not export oriented.

Lahore Cluster

The Lahore cluster is basically based on the traders of wooden furniture. These traders usually purchase furniture in semi-finished form from Chiniot/Gujrat, polish and upholster it in their workshops. There are around 100-200 Lahore based small cottage sized workshops engaged in wooden furniture manufacturing. Their profit margins are quite high as all the value addition is done in Lahore according to the requirement of the customers.



Majority of these manufacturing units use low-tech machinery either locally made or second hand imported machines. However, some furniture manufacturers have established their production line based on new modern machinery and seasoning kiln facilities.

Rawalpindi/Islamabad

Islamabad/Rawalpindi, like Lahore cluster is based on the traders of wooden furniture. These traders usually purchase furniture in semi-finished form from Chiniot and other clusters, however, polish and upholster it in their workshops. Some of the stakeholders

On average each manufacturing facilities employs 5 to 20 workers



depending on its scope of work, while some has sufficient manpower strength such as M/s Wood Castle having its two units in Gajju Matta, Royee Nala, Near Sabzmandi having 150 manpower strength, similarly M/s Furniture Point at Multan Road, Lahore working with the manpower strength of 80 in number as well as Interwood which is above all. At present there are around five large clusters of furniture markets within Lahore i.e. Fortress Stadium, Gulberg, Allama Iqbal Town, Ferozepur Road and Multan Road. These markets mostly cater to the needs of the domestic market.

have installed state of the art machinery imported from Turkey and China and initiated production on mass scale of contemporary furniture and are export oriented. The raw material used in these state of the art units are MDF, lamination board etc.

Karachi Cluster

Karachi cluster represent a mix of contemporary and traditional furniture. It offers comprehensive home furnishing products, interior designing and interior projects on turnkey basis. Large scale production units with promising display centers of furnishing & interior products including home and office furniture, decorative ornaments, flooring products, vast range of laminated & hardwood flooring etc. add value to the cluster.



Furniture produced in Karachi is made of seasoned hardwood, MDF, chipboard, laminated boards with the combination of Solid Wood, metal components, Deco Paint and other materials to optimize the product quality & appearance. The best quality laminated boards are using having textured surfaces including wood grain, Oak wood grains, stone finished, high gloss (luster/polish/shine) etc. Some of the firms have adopted state of the art machinery and produce on mass scale.

Swat Cluster

Upper parts of Swat district are famous for art of wood carving passing down from generation to generation. The art has centuries old history and deep impressions. They deployed their labor in the far flung areas of Malakand, Mansehra Divisions, D.I.Khan, newly converted districts (formerly tribal areas), different regions of Punjab, Sindh, they purchase the 10 – 50 years old furniture which includes wooden doors, windows, wooden pillars used in ancient times verandas, rooms and even old furniture of all kinds, which further they modify, revamp its carving. The old traditional doors/windows they convert into dining/center tables other interior decorative pieces. The furniture stakeholders at Swat have sizeable warehouses where they store the old



furniture being purchased from different part of the country and further relocate into Swati traditional carved furniture.



Very important to cover that the old furniture they purchase from different parts of the country has no use except to use as firewood or consider it as waste, but they recycle and relocate its shape into traditional Swati carved furniture/handicrafts and exported to US, UK, Italy and France. The below picture shows packed furniture products ready for export to Italy (as reported).



Previously, they export their furniture on regular and large scale, but these days after the COVID and due to some ANF/Custom dry port issues has curtailed and only a container or two in a month are exported. The dry port issue has been taken up with the ANF to streamline the system. Based on consultation with the ANF a proposal under the PM Economic Outreach Initiative has been submitted to the E&M Division, TDAP, Karachi for further consideration by the Ministry of Commerce.

Quality

Superior Quality_	Superior quality bed set, dining and office furniture sets are made of supreme quality pure wood furniture with elegant hand carved design. Superior quality has extra carving with complex and elegant design and extra fine polishing and finishing. While Superior quality sofa set is manufactured from best available upholstery material with elegant design & extra comfort.
Fine Quality	Fine quality bed set, dining set, misc. furniture set and office furniture are made of fine quality pure wood. Simple but appealing hand carving is done with fine quality polishing. While fine quality sofa set has a quality upholstery material & elegant design.
Normal Quality	Normal quality bed set, dining set and office furniture are made of a mixture of pure wood and substitute material (Lasani, Vim board etc). Lasani gives fine and even surface for finishing and paint Smooth surface gives eye-catching effect.

Sub – Sectors

Pakistan has a diverse history of handicrafts. The entire timeline of its culture was studied through ages. However, it lacks actual dates and origin despite flourishing the great Indus Valley Civilization through Pakistan. On the other hand, experts claim that 80% of South Asian craftsmanship is still found in Pakistan, and the former craftsmen were mostly from the different regions of the country. People of Karachi used to sell "jewelry, ornaments, textiles, furniture, leather goods" and other handmade items in markets that give an impression of its historical existence.

Pakistan handicrafts sector is not playing significantly in its economic development. It possibly lacks international marketing assistance and low legislation attention. Crafts in Pakistan, according to News media were listed among the low-earning businesses as compared to other assets. It estimates an amount of \$255 million annually. However, it plays a lead role in rural areas, especially among women, who produce several types of crafts in the country. Government of Pakistan has claimed that its handicrafts business is playing a vital role in its economy during the past 15 years. Furniture and textiles are among the key crafts of the country, mostly from Sindh, Punjab.

Trade Statistics

Top 10 Exporting Countries

Exporters	Exported value in 2018	Exported value in 2019	Exported value in 2020	Exported value in 2021	Exported value in 2022
World	89,473,369	90,267,167	93,537,577	114,533,656	115,956,407
China	28,090,223	27,725,338	30,759,899	38,292,531	37,143,848
Viet Nam	4,606,903	5,516,587	6,947,431	7,593,622	12,347,279
Germany	8,011,243	7,951,498	7,774,990	9,349,458	8,980,051
Italy	7,891,732	7,533,394	6,855,526	8,402,997	8,475,001
Poland	5,311,464	5,476,256	5,644,338	6,817,663	5,842,530
Canada	2,787,372	2,899,339	2,403,409	2,719,544	3,251,453
United States of America	3,008,134	2,863,916	2,447,726	2,799,521	3,001,215
Malaysia	1,925,093	2,135,265	2,501,908	2,539,749	2,622,875
Türkiye	1,488,049	1,762,848	1,751,199	2,210,538	2,472,474
Mexico	1,260,368	1,411,331	1,411,018	1,955,180	2,362,335

Unit : US Dollar thousand

Sources: ITC calculations based on UN COMTRADE and ITC statistics

World Top Importers

Importers	Imported value in 2018	Imported value in 2019	Imported value in 2020	Imported value in 2021	Imported value in 2022
World	86,794,445	85,701,400	84,179,734	104,806,449	109,219,512
United States of America	27,477,854	25,441,093	25,814,418	31,961,324	36,139,352
Germany	6,194,429	6,362,397	6,779,166	8,172,097	7,817,142
United Kingdom	4,985,936	4,995,663	4,427,221	5,755,749	6,327,536
France	4,668,484	4,710,871	4,467,167	5,919,635	5,697,183
Netherlands	2,787,340	2,898,674	3,244,519	4,098,116	3,913,573
Canada	2,940,826	2,970,518	2,805,083	3,482,051	3,761,489
Japan	2,666,451	2,764,917	2,833,617	3,165,716	3,117,441
Switzerland	2,156,870	2,058,335	2,083,998	2,397,879	2,355,133
Australia	1,813,870	1,736,677	1,729,087	2,070,073	2,153,448
Belgium	1,447,666	1,455,569	1,496,264	1,978,802	1,843,260

Unit : US Dollar thousand

Sources: ITC calculations based on UN COMTRADE and ITC statistics

PAKISTAN EXPORTS

HS Code	Exported value in 2020-21	Exported value in 2021-22	Exported value in 2022-23
Total	5.193	9.51	12.596
94031000 Metal Furniture used in office	0.078	0.06	0.0726
94032000 Other Metal furniture	0.242	0.29	1.004
94033000 Wooden Furniture-Office Use	0.674	0.69	0.534
94034000 Wooden Furniture-Kitchen Ues	0.220	0.05	0.101
94035010 Wooden Cabinets	0.031		
94035020 Wooden Beds	0.016	0.07	0.155
94035030 Oth Furniture & Parts	0.224	0.46	1.610
94036000 Other Wooden Furniture	2.107	2.25	1.977
94037000 Furniture Of Plastics	0.259	0.31	1.022
94038200 Furniture Of Bamboo			0.0407
94038300 Furniture Of Rattan			
94038900 Other Furniture Of Cane	0.402	2.30	3.024
94039000 Parts Furniture	0.941	3.02	3.039

Unit : US\$ Million
Sources: PRAL

PAKISTAN IMPORTS

HS Code	Imported value in July- 2022-May-23
Total	6.408
94031000 Metal Furniture used in office	0.436
94032000 Other Metal furniture	1.351
94033000 Wooden Furniture-Office Use	0.252
94034000 Wooden Furniture-Kitchen Ues	0.442
94035010 Wooden Cabinets	0.021
94035020 Wooden Beds	0.161
94035030 Oth Furniture & Parts	0.431
94036000 Other Wooden Furniture	0.522
94037000 Furniture Of Plastics	0.288
94038200 Furniture Of Bamboo	0.002
94038300 Furniture Of Rattan	
94038900 Other Furniture Of Cane,	0.422
94039000 Parts Furniture	0.208

Unit : US \$ Million
Sources: PRAL

HS-Code-Furniture

(Metal, Wooden, Plastic and Other material)

HS Code	Product Label	
9403	9403 - Furniture and parts thereof, n.e.s. (excl. seats and medical, surgical, dental or veterinary furniture)	
Metal Furniture	940310	Metal furniture for offices (excl. seats)
	940320	Metal furniture (excl. for offices, seats and medical, surgical, dental or veterinary furniture)
Wooden Furniture	940330	Wooden furniture for offices (excl. seats)
	940340	Wooden furniture for kitchens (excl. seats)
	940350	Wooden furniture for bedrooms (excl. seats)
	940360	Wooden furniture (excl. for offices, kitchens and bedrooms, and seats)
Plastic Furniture	940370	Furniture of plastics (excl. medical, dental, surgical or veterinary, and seats)
Furniture of Other Material and Parts	940380	Furniture of cane, osier, bamboo or similar materials (excluding of metal, wood and plastics)
	940381	Furniture of bamboo or rattan (excluding seats and medical, surgical, dental or veterinary)
	940382	Furniture of bamboo (excl. seats and medical, surgical, dental or veterinary furniture)
	940383	Furniture of rattan (excl. seats and medical, surgical, dental or veterinary furniture)
	940389	Furniture of other materials, including cane, osier or similar materials (excl. of bamboo, rattan, metal, wood and plastics, and seats and medical, surgical, dental or veterinary furniture)
	940390	Parts of furniture, n.e.s. (excl. of seats and medical, surgical, dental or veterinary furniture)
	940391	Parts of furniture, of wood, n.e.s. (excl. of seats or medical, surgical, dental or veterinary . . .
	940399	Parts of furniture, not of wood, n.e.s. (excl. of seats or medical, surgical, dental or veterinary . . .

Trade Bodies

All Pakistan Furniture Exporters Association (APFEA)

(Currently suspended)

G-2 Hamilton Court block-7 main Clifton Road Karachi

E-mail: apfeachairman@gmail.com,

Ph: 021-34829398

Mr. Rana Waheed,

(CHAIRPERSON)

Mr. Farrukh Saeed Ansari ,

Vice Chairman (North)

Mob:0300-8640210 info@apfea.com.pk

Mr. Wajahat Hussain

Secretary General

Mob: 0315-8415145, Email: apfeachairman@gmail.com, info@apfea.com.pk

All Pakistan Furniture Makers Association

2nd Floor, Building Gujrat Chamber of Commerce and Industry,

G.T. Road, Gujrat

Ph: 053-3713110

Mr. Hamaad Aslam ,

Chairman

Mob: 0322-6299992

Mr. Muhammad Bilal ,

Sr. vice Chairman

Mob: 0300-6271480

Mr. Talha Hussain,

Secretary General,

Mob: 0348-6719045, E-mail:- chairman.apfma@gmail.com

Pakistan Furniture Association (Unregistered)

Mr. Zahid Hussain

Chairman

Cell: 0333-2424932

Top Exporters/Manufacturers

According to www.pakistanexportersdirectory.gov.pk the total numbers of wooden products/furniture exporters are more than 400.

SN	Company Name	Focal Person	Contact Detail
1.	Trafin (Pvt) Ltd	Mr. Muhammad Faheem, CEO Mr. Naveed, Advisor	ST-2-A, Sector 23, Korangi Industrial Area, Karachi. 021 350530107, 800, 001(281)816-6835 0344-2140971 naveedarifca@yahoo.com, mail@faheems.com
2.	Al-Razzaq Fibres (pvt) Limited	Mr. Mustafa Saya, CEO Mr. Muhammad Atif, Manager (Exports)	C-7, K.D.A. Scheme No. 1, Habib Ibrahim Rahimtoola Rd. Opp. P.N.S. Karsaz, Karachi 021 34545703-06, 0321 8286901, 0306-5796319 Office@alrazzaqfibres.com
3.	Pakson International Plastic Industries pvt Ltd Brand name Boss Plastic	Mr. Sheryar Export Manger Mr. Azam Mughal (Owner)	49-A, SIE No1, Gujranwala 055 3842891-7, 0324-9202127 info@bossplas.com, export@bossplas.com
4.	Wings chair Pakistan (private) Limited	Mr. Dawar Rasheed, CEO Mr. Adil Alam Director	218-FF, Commercial Area, DHA Phase 4 Lahore 0321 7777974, 0321 8436814 dawar@wingchair.com.pk
5.	NM furnishers	Mr. Amir Latif, G.M.	G.T Road Gujrat 0303 9562022, 053-111-111-162 tafheem.azmat@yahoo.com
6.	Kalamkaar	Mr. Qais Rehman (Owner) Faiz ul Qadir (focal person)	Flagship Showroom 19 Km Ferozepur Road , Behind Glaxo Factory Lahore 042 35457303, 0300 8433833, 0321 8453611 info@kalamkaar.com, kalamkaar@kalamkaar.com
7.	Channa Enterprises	Mr. Ghulam Khaider Channa	B-111, Blcok-II, Gulistan-e-Johar, Karachi 0331 2033453 channa.haider789@gmail.com
8.	Tak Import Export	Mr. Zargham Khan (Proprietor)	382-Nasheman-E-Iqbal Coop[erative Housing, Thokar Niaz Baig, Lahore 042 35186232, 0321-4614953
9.	Fairmount Industries Pvt Ltd	Mr. Umer Director	Nizam Street, Kotli Behram, Sialkot 0332-8828282, 0524 263582 info@fair-mount.com
10.	Haji Mohammad Shafi and Sons Trading Corp		S-134 PHASE III LCCHS CANTT 042 35732067 fantacpak@hotmail.com
11.	Utopia Industries (Private) Limited	Adnan Niaz	Plot No C 16, Phase 1, Super Highway SITE, North Karachi Town 03162881309, 0097 52 9604599 adnan@utopiadeals.com
12.	Global Connections	Rehan Sheikh	Flat#301 3rd Floor Plot#12-C Ittehad Lane #4 Phase VI DHA Defence Housing Authority Karachi 0336 2254498, 0336-2254498 qac10@hotmail.com
13.	First Choice Handicraft	Mr. Farhan	Gulzar-e-Hijri White House Gulzar E Hijri Scheme 33, Karachi 0300 2135547 info@fchshop.com

14.	Gaba Carpets	Mr. Sheryar	H.No E-157/C4, St# 10 Iqbal Park, Opposite Adil Hospital, Defence Road Lahore Cant 0092 309 3474066 gabapkonline@gmail.com
15.	Shah Enterprises	Mr. Rehman Safi	D-52, Sadat Carpet Market, Suikarano Square, Peshawar 091 2561888, 0315-9861331 tanveer67_pk@hotmail.com
16.	Polygon Exports	Mr. Usama Nawaz	213-Eden Valley Canal Road Faisalabad 0323 7767760 usama.nawaz@polygonexports.net
17.	Chadyala Art	Mr. Shahzad Raza,	C-288, Sector 35-A, Zaman Town, Korangi Industrial Area, Karachi 0333 3158488 chadyala@gmail.com
18.	Masood Furnishers		Opposite Cleft Hospital, Jaliani, G. T. Road, Gujrat 0300 8541897 tafheem.azmat@yahoo.com
19.	Raza International	Mr. Iqbal	Kachi Abadi Basti Shaheen Abad 061 4552066 0346-7008252 kanwartanveer@yahoo.com
20.	Yaqoob Ahmad	Yaqoob Ahmad	House No. 2, Street No. 36 Canal Park, Gulberg II, Lahore. 0300 2035493 paktrade_linkers@hotmail.com
21.	Ross Woods Works		Street No.3, Mohallah New Platt Toba Road 046 3512158 rosswoods@safe-mail.net
22.	Mujeeb Enterprises	Mujeeb	Flat No. 45-B, 3rd Floor, Royal Plaza Karkhano Market, Peshawar 03005875965 rafiqkhan470@yahoo.com
23.	Chiniot Art Center		Shahrah-E-Quaid-e-Azam, Mohallah Garah, Chiniot, Chiniot Chiniot . 0476333020 farhankhalil2010@hotmail.com
24.	GM Furnitures	Mudassir	Basement Fun Para Plaza Shahrah-E-Quaid-E-Azam 0476333266 hussainlawcompany@yahoo.com
25.	Ajwa Interior	Aziz ur Rehman	Mohallah Rehmanabad, Near Fatima Chowk, Jhumra Raod, Chiniot Chiniot . 03217702804 ajwainterior@gmail.com
26.	M/s. Sidco International Trading	Imran	Office 77-A, Green City, Barki Road, Lahore Cantonment . 04237184255, 0301-4552224 jasiddiqi@hotmail.com
27.	Trendline Furnishers	Ali Ansar Ghuman	G.T. Road, Gujrat 0533706167, 0301-8617193 zafarassociatesgujrat@hotmail.com
28.	Interwood Mobel Pvt Ltd	Mr. Muhammad Saad	56 Sultan Mahmood Road Shalimar Town Baghbanpura Lahore 0333-8366572, 042-36549123

29.	ZUNN Furniture (Private) Limited	Mr. Kamran,	F-17, Block-5, Clifton, Karachi 021-35834030, 0334-2191555
30.	Vogue Furniture	Mr. Muhammad Rizwan, Manager	Ghazi Road Dereh Pindi Cantt, Lahore 042-37179456-58, 042-36662187, 0300-8453101,
31.	N M Furnishers	Mr. Amir Latif, G.M.	G.T Road Gujrat 0303-9562022, 053-111-111-162
32.	Khalid Enterprises	Mr. Zahid Saleem,	Plot No St-17, Sector 7-A, Korangi Industrial Area, Karachi 092-213-5066961, 0300-7072136
33.	The Roshan's	Mr. Rana Waheed	209/B, Sector I, Mukhtar Road, Main Shaheed-e-Millat Expressway, Near Kashmir Plaza, Karachi 0321-2444624
34.	JF Homes, Karachi	Mr. Muhamamd Fawad Sheikh	47-C, 27 Commercial Street, Tauheed Commercial, DHA, Phase-5, Karachi 021-35169091, 0322-8243545
35.	Lunar Furniture, Karachi	Mr. M. Usman Mahenti	G-18/VI Chaudry Khaleeq-Uz-Zaman Road, Block 8 Clifton, Karachi 0321-8221566
36.	Wood Castle	Haji Allah Ditta	6-A-3, Main Mehmood Ali Kasuri Road, Block-A-III, Gulbarg – III, Lahore 042-35773154, 0300-2757393
37.	Rehman Furniture House	Mr. Ulfat Rehman	T-1247 City Circular Road, Near PSO Pump, Yakatoot, Peshawar 0304-5000058
38.	Noor Traditions		60-61 Glamou One Plaza, Mian Peco Road, Township, Lahore 042-35151263
39.	Tijarat Marketing Management	Col Arsalan,	52, 2nd Floor Waheed Trade Complex, LCCHS, Lahore 042-35184761, 0346-4002978
40.	Aristo The Creators	Mr. Kashif Zahir Chief Executive Officer,	Shop No.4, National Business Center Shamsabad, Murree Road, Rawalpindi Corporate Office: 135-Haji Road Street No.7, Westridge No.1, Rawalpindi Cantt: 0345-5102306, 03335168867
41.	Liaq Co. (Export)	Mr. Liaq Ahmed Mr. Naushad Hussain	A-52, Block 13A, Gulshan-e-Iqbal, PRECHS, Karachi 0315-8415145, 0300-8287007
42.	Exotic Wood,	Muhammad Arshad	Malik Khan Sher Furniture Market, University Road, Tehkal Bala Tambawan Stop Peshawar 0300-5948283, 0310-9698040
43.	Pak Khyber Traders, Peshawar	Mr. Umair Jamal	2nd floor, JS Bank Building Namak Mandi Chowk, Peshawar 0336-9576264
44.	Coliseum Associates	Mr. Nasir Khan	5, Park View Morgah, Rawalpindi (051) 548-7222, 548-7333, 0300-5230024
45.	Decent Furnishers, Gujrat	Mr. Mirza M Fiaz	G.T Road Opp Services Industries, Gujrat 053-3724599, 0345-6911071
46.	Habitt, Karachi	Mr. Ali Babar	Building Center, Tipu Sultan, Shahrah-e-Faisal, Karachi 0331-2887477
47.	Riaz Furniture	Mr. Ahsan Muhamamd	Tehkal Bala Road, Peshawar 0312-5885262
48.	Peshawar Rose Wood	Mr. Inayat Ullah	University Road, Tambawano Mor, Ameen Plaza, Peshawar 0315-9629207
49.	National Wood Furniture	Mr. Saleem Javed	Tehkal Bala Road Tambawano Stop, Peshawar 0317-9716588, 0302-9274368
50.	Wood Packer Art Furniture	Mr. Sheikh Anis Vora	Shahra-e-Quaid-e-Azam, Chiniot, Punjab 0300-7700489, 0312-7700489
51.	Al-Fakhri Furniture	Mr. Danish Naeem Fakhri	10-Fakhri Plaza Shahrah-e-Quaid-e-Azam, Chiniot, Punjab 0300-7700400
52.	Woodco Furniture	Mr. Farukh Saeed Ansari	Pindi Bye Pass Beside Board Of Education Gujranwala 0300-8640210

AVAILABILITY, PRICE AND QUALITY OF RAW MATERIAL

Availability

More than 80% of Pakistan's furniture is dependent on Sheesham, also called rosewood. In the last five years, the Forestry department has noted that the reserves of Sheesham have decreased by 50%. Sheesham is getting extinct day by day. Due to its shortage in the market, their price is on the increasing trend. Currently, very few exporters are using other woods as a substitute for Sheesham, but their use is gradually increasing. Still the use of substitutes is limited because these woods are also scarcely available. Also, the exporters are not very much aware of their usage and treatment.

At the same time, the use of imported woods is increasing. Duty structure has reduced considerably. However, those companies that are using imported timber believe that the reduced duty structure has not affected the price structure a lot. The dealers have kept the same prices, with the justification that the prices have increased in the international market, freight rates have increased and dollar value has increased, etc. The industry should assess the demand and import wood in bulk.

Shortage of rosewood (Sheesham) – What are the options?

It is not possible to cover or suggest the shortage of wood in this presentation. It needs a separate study which covers the following.

Raw Material Status

What is the current area (hectares) covered and where. Find out its volume, ownership, age of trees and access (inventory/stock taking). What is the role of rosewood and other types of trees on the environment (soil erosion etc.)? The study should also cover non-rosewood

New Plantings of Rosewood

What goes on right now in rosewood - of new planting, if any? Where should it be, who should own/pay, what are the obstacles, timing, etc.?

Other types of wood

What other types of wood are being planted or could/should be planted? Where, by whom, cost, timing, etc.? How do/would they grow in Pakistan (climate, soil,)? Which types would fit into the present product mix, the equipment/machines available, the experience among producers etc.?

Import of Wood

Which types of wood, from where, cost estimates (raw material price and transportation), logistic issues i.e. harbour, storage, financing, etc.)? What is the need for redesign of products, possible other markets and other types of equipment to handle?

Other End Products

What are the options for products that require less rosewood e.g. based on designs that are thinner/slimmer/smaller or mixed with other types of wood?

Reduced Wastage Programme

Wastage is mentioned to be huge. What could be done i.e. change of machines, training, other sizes of lumber, etc. to reduce the waste?

Better use of Wasted Wood

How could the wasted wood be used better? Either for other products (handicraft etc.) or for making bigger pieces by pressure techniques or finger-joint, etc.

Quality


The quality of local Sheesham, which was available a few years back, is not available any more. There are many reasons for this. The use of plywood and ply boards has increased a lot. Most Sheesham wood is taken by this panel board industry because they require very thin slices of wood i.e. veneer. From the same wood they make 10 to 15 sheets to make various tops of boards. Currently, Pakistan's exports are based on solid wood. Its market will keep on shrinking internationally. The second and third parts come to furniture manufacturers and exporters at high rates. Previously, there was no plywood industry, thus good quality of Sheesham was available for manufacturers. Also, there was a launch industry. In Sindh, the quality of Sheesham is not that good and it is available at low-medium prices. The quality of wood is dependent on region, soil and availability of water, etc.

Technology

Technology levels in furniture industries of the developing countries :__

1. Facilities that use basic portable tools and universal woodworking machines
2. Facilities that use basic woodworking machines (band saw, planer, thicknesser, spindle moulder, boring machine etc.) to produce in small batches
3. Facilities same as in 2, but producing larger batches, using low-cost mechanization and jigs suitable for serial production whenever possible
4. Facilities that use special purpose machines (4-side moulders, copying lathes, edge-benders, CNC moulders etc.)
5. Facilities with integrated machining lines (linked machines used for production of panel furniture, doors, surface finishing, robots used for painting, integrated lines).

Source: ITTO-ITC (b), 2002



Due to lack of tree plantation, skilled manpower, high cost of production, and the government's inability to promote research and development for creative designing, Pakistan furniture exports decline from US\$ 12 million to \$3.136 million in the last five years.

With only three percent forests on a total 796,096 square kilometer area, Pakistan is unable to meet the World Trade Organization's standard of four percent forests - a condition that could be a major hurdle for the country's furniture exports in the future.

Factors Determining Competitiveness

- In conclusion, countries will have to base the competitiveness of their wooden furniture on either one, or preferably all, of the following factors:
- Low-cost local inputs (notably wood and labor)
- High total productivity (measured over all factors of production i.e. wood, labor, capital, energy and operating supplies)
- Superior quality of products (including design and articulate handwork)
- Consistent operational efficiency through prompt supply-delivery schedules, and
- Genuine customer satisfaction through willingness to replace damaged goods and other after-sales service.
- It is good to remember that even though China has the world's largest number of furniture enterprises it has no world-famous furniture brands, no master designers, no global sales network and no world-class exhibitions. In conclusion, China rules exports due to its efficient and flexible production at low costs.

Furniture Standards and Certifications

The objective of standardization is to ensure that all furniture available in the market is safe to use and of solid and strong construction. Therefore, standardization is helpful in facilitating market conformance, including from developing countries. However, there is also a risk that standards may become a constraint for market access or put small producers at a disadvantage when the requirements are particularly difficult to meet. Manufacturers normally use the standards voluntarily in their product development, process control and marketing. Having a common language on test methods, dimensions, safety, and strength characteristics is considered a major benefit.

There are over 140 furniture-related standards and labelling requirements in the United States and Canada alone. Most standards are voluntary but some are regulated by the state or federal laws. One example of the toughening state-level health standards is in the text box below.



The European Committee for Standardization (CEN) is responsible for the harmonization of standardization in the European Union. Their EN standards on furniture are not meant to serve for protectionist aims. On the contrary, they are proposed as a basis for wider international work on furniture standards under the ISO/TC 136 "Furniture". (International Organization for Standardization.)

The national standards institutions in the developing countries are either ISO members, ISO correspondents or ISO subscribers. Their capabilities to implement ISO are often weak. Only few countries have certification bodies, which can issue certificates of compliance with ISO 7173 standards (chair standards for strength and durability), for example. The furniture industry itself should support efforts to establish adequate national standardization institutions and certification bodies.

The Pakistani industry indicated that only the holders of ISO 9001 standard are able to export furniture. ISO 9001 is a broad quality management standard, which is not product-specific. The SESSI Standard from France is said to be followed by some furniture manufacturers. SESSI is not issuing standards, so this is possibly a misinterpretation of the French buyers' specifications. French industries are quite strict in their requirements as far as standards are concerned. Moreover, they often require the respect of "French Standards" (NF Ameublement), although European standards (EN) at the moment have substituted almost all the national standards.

Many standards concern the safety of furniture and its raw materials (e.g. breaking level of pieces of wood: NF-EN 1727). These can apply to tabletops, doors and beds (including children beds). There are also quality standards, which establish performance criteria for the long-term use of furniture. In this case the standards are provided after testing based on long repeated cycles of use.

It is recommended that a potential new furniture exporter from a developing country should discuss with the potential buyers (wholesalers, importers, retailers, etc.) what their requirements are and deal with them. The more alert – or responsible – companies may be the ones to reap the greatest benefits of being "green", but that is not to say that the indifferent or just plain irresponsible ones will be forced out of business. They will simply seek less demanding buyers.

In EU a manufacturer or exporter can be held liable for compensation for damage caused by inappropriate furniture.

TDAP Initiatives During (2021-23)

Webinar Problems in Exports of Furniture

Trade Development Authority of Pakistan as part of its in-depth vision and strategy to promote the “business” image of Pakistan in the key export markets for Pakistani products and services, the world over and achieve a quantum-leap in Pak exports, organized a Zoom Call Webinar – Consultative Session on the “**Problems in Exports of Furniture**” on 15-July-2021. The webinar was attended by:-

- All Pakistan Furniture Exporters Association (APFEA), Karachi,
- All Pakistan Furniture Makers Association (APFMA), Gujrat
- Pakistan Furniture Association, Islamabad (under process for registration),
- The furniture sector stakeholders of Peshawar and Chiniot clusters.
- Representatives of the Forest Department, Govt. of KP, KP -BOIT, State Bank of Pakistan and the officers of TDAP

A detailed report on the problems identified and recommendations developed was compiled and priority-wise issues are dealt with.

Webinar on Prospects for Pakistan in the Furniture Market of Saudi Arabia

Trade Development Authority of Pakistan in collaboration with the Embassy of Pakistan (Commercial Section), Riyadh, Saudi Arabia organized Webinar on the “**Prospects for Pakistan in the Furniture Market of Saudi Arabia**” on 14-Sept-2021 at 3:00 p.m. The webinar was attended by 39 stakeholders of :-

- All Pakistan Furniture Exporters Association, Karachi.
- All Pakistan Furniture Makers Association, Gujrat .
- Pakistan Furniture Association, Islamabad (under process for registration).
- Stakeholders of Peshawar , Chiniot and Lahore clusters.

Webinar - Prospects for Pakistan in the Furniture Market of Jordan - (22-Dec-2021)

Trade Development Authority of Pakistan in collaboration with the Embassy of Pakistan, Trade & Investment Section, Jordan organized Webinar on the "Prospects for Pakistan in the Furniture Market of Jordan" on 22-Dec-2021 at 3:00 p.m. The webinar was attended by the following 23 stakeholders/representatives of the trade bodies: -

- All Pakistan Furniture Exporters Association, Karachi.
- All Pakistan Furniture Makers Association, Gujrat.
- Pakistan Furniture Association, Islamabad.
(under process for registration).
- Stakeholders of Peshawar, Chiniot and Lahore clusters.

First & Second Engineering & Healthcare Shows at Expo Center Lahore (2022 & 2023)

Display of all kinds of classic, traditional, antique and modern furniture was ensured on 32 stalls in the first and 42-Stalls in the second Engineering & Healthcare Shows at Expo Center, Lahore respectively.

Clusters Visit

Visited the Pakistan furniture clusters (Peshawar, Swat, Hattar, Rawalpindi/Islamabad, Gujrat, Lahore, Chiniot and Karachi) and developed a detailed report on the cluster-wise market trends (furniture manufacturing).

Organization of Sector

Organized the furniture sector (Khyber to Karachi). Developed its database and WhatsApp groups and on daily basis/need basis the furniture sector relevant trade enquiries and information are shared.

Economic Outreach Initiative (EOI) of the Prime Minister

Furniture drilling by the ANF, a longstanding problems has been taken up with the Ministry of Commerce. The issue has been declared as agenda point of the EOI. Certain meetings conducted with the ANF and a report on the deliberation with the ANF has been submitted to the Ministry of Commerce for onward submission to the PM Office. Simultaneously, the Engineering Division, TDAP, Hqrs. has also taken up the issue with the Ministry of Narcotics Control, Islamabad for redressal.

Revival of the Pak-Swedish Institute, Karachi

A joint visit (TDAP-All Pakistan Furniture Exporters Association) was undertaken to the Pak-Swedish Institute, Landi, Karachi and conducted meeting with its management for revival of the Wood Working Section of the Institute. At the same time the matter was taken up with the Sindh TEVTA for revival. Two consecutive meetings of APFEA held with the TDAP management for way out to restore the Wood Working Section of the institute and skill development trainings are started again. The association has been tasked to develop consensus with the institute's management and come-up with a modus operandi for its restoration through EDF funding or some other source.

Webinar – Prospects for Pakistan in the Furniture Market of Tajikistan

Trade Development Authority of Pakistan, in collaboration with the Pakistan Foreign Mission at Tajikistan, as part of its in-depth vision and strategy to promote the “business” image of Pakistan in the key export markets for Pakistani products and services, the world over and achieve a quantum-leap in Pak exports, organized a Webinar in the name of “Prospects for Pakistan in the Furniture Market of Tajikistan” on 04-Aug-2022.

Mr. Imad Naseem, Charge d’ Affaires, Pakistan Foreign Mission, Tajikistan in a presentation identified gaps in the furniture market of Tajikistan where the Pakistani business community can penetrate and exploit the market for exports. Emphasized that Tajikistan is a landlocked state; located in the foothills of the Pamir Mountains and in the neighboring bordered by Uzbekistan, China and Afghanistan.

Pakistan-Tajikistan Furniture Counterparts B2B – Joint Webinar

In continuation to the Webinar on the Prospect for Pakistan in the Furniture Market of Tajikistan held on 4-Aug-2022, TDAP in collaboration with the Pakistan Mission, Dushanbe, Tajikistan organized 2nd Pakistan-Tajikistan Furniture Counterparts B2B – Joint Webinar on 30-Aug-2022 at 3:00 p.m.

Online Training on Amazon

To educate the business community regarding “Marketing and Selling on Amazon” training session on – “Marketing and Selling on Amazon” was organized on 14-Sept-2022. The training was based on four modules spelled out by the resources persons/Amazon expert of TDAP.

Webinar – Prospects for Pakistan in the Furniture Market of Qatar

To explore opportunities in Qatar for furniture exports, Webinar – Prospects for Pakistan in the Furniture Market of Qatar was jointly organized by Trade Development Authority of Pakistan and Pakistan Mission at Qatar on 31-Oct-2022.

Ms. Serein Asad, TIA, Pakistan Embassy, Doha, Qatar in her presentation provided insights into the furniture imports of Qatar and shared data of major furniture exporting countries to Qatar along with details of items that are in high demand. Ms. Ilao and Mr. Sayed from Blu Casa, Qatari businessmen also explained preferences of Qatari buyers for furniture products and provided insights into their procurement process for different projects.

Webinar – Export Procedure – Furniture Sector

To educate the furniture sector business community, TDAP organized a webinar on the export procedure registration process with the FBR/Securities & Exchange Commission of Pakistan (SECP), Market Access Analysis, Product Marketing, Government Support, Purchase Order, Buyers Requirements, Contract with counterparts, Packing List, Certificate of Origin and Bill of Land etc. on 24-Nov-2022.

Webinar – Prospects for Pakistan in the Furniture Market of Kenya

TDAP and Pakistan Commercial Section, Kenya organized webinar on the Prospects for Pakistan in the Furniture Market of Kenya on 25-Jan-2023. This webinar was attended by members of All Pakistan Furniture Exporters Association, Karachi, All Pakistan Furniture Makers Association, Gujrat and Chiniot Chamber of Commerce and Industry.

Mr. L.D. Khan, Commercial Counselor, High Commission for Pakistan, Nairobi delivered a detailed presentation on the furniture import market of Kenya. Highlighted that Kenya has imported furniture worthy US\$ 42.217 (m) in 2021 from the world market wherein Pakistan share is extremely insignificant and this is due to lack of presence of the Pakistani business community in the market in one or the other way either to participate in the business activities held at Kenya or open sister outlets.

RECOMMENDATIONS

Individual Companies

- Optimize the use of the highest-valued raw material and introduce new wood species (imported) to fill the shortening supply of traditional species.
- Start a kiln-drying side business on joint venture or a contract-kiln operator basis. This helps avoiding cracking of furniture in the final destinations, which causes irrevocable damage to the reputation of Pakistani furniture.
- Establish a “Human Resource Development Fund”, catering for the collective training needs across industry clusters. Invite foreign training staff and designers through this funding mechanism.
- Prepare for investing in compressor-spraying gun based painting and lacquering to improve final quality.
- Seek participation in training courses abroad.
- Propose the establishment of a Furniture Market Information System, with the purpose of permanent provision of commercial information to the furniture firms.
- Demand vocally for better Export Promotion Services.

Relevant Associations

- Develop and raise funds for implementing industry-wide training programmes on furniture manufacturing processes, management skills, design and skilled worker training programs, etc. through human resource development funds and other resources.
- Widen the existing design institute network out of Gujrat, Peshawar and Karachi.
- Arrange direct technical assistance to enterprises to capture the emerging export opportunities. This could include market orientation tours, design networks, workshops, development of business skills (including negotiation skills with big buyers), etc.
- Facilitate systematically efforts by the industry to know its customers and have direct access to them rather than continuing reliance on (too many) intermediaries. An internationally targeted furniture exhibition and joint export campaigns could be part of such an effort if the country has a critical mass of suppliers.
- Initiate the building of Permanent Exhibition Halls to key furniture clusters inside Pakistan or in big markets like the UAE for more efficient showcasing for visiting buyers. The concept should combine furniture

with matching accessories from Pakistan (exhibit an interior style, rather than just furniture).

Relevant government authorities

- Award furniture industry with policy priority because of multiple economic, social and resource valuation benefits (high value added, high employment, and potential location in disadvantaged areas).
- Improve the existing public domain databases related to furniture industry (on markets, products, standards).
- Help furniture industries to respond to emerging issues, such as changes in wood sources, certification and labelling requirements for exports, and non-tariff barriers to trade (overcome trade impediments).
- Provide support for the sector by means of an enabling policy environment, i.e. investment incentives, trade promotion activities, freight subsidy, and temporary export restriction of raw materials (logs, sawn timber), which can spur the growth of an export oriented furniture industry.
- Create an export levy collection system on logs and sawn timber, use funds for financing value-added processing investments by furniture industry, or improve wood planting and forest management.
- Channel public funding into common support services (training, design, investment support, tool maintenance, etc.), with the aim of rationalizing the manufacturing base and making it competitive in the long run.
- Promote foreign investment as means to boost technology transfer and export capability.
- Allocate industrial zones or premises that have been left idle to the furniture industry.

TDAP

- To eradicate the issue of furniture drilling and meticulous examinations at ports by the ANF and Pakistan Customs.
- The skill development government/donor agencies funded institute at Karachi, Gujrat, Chiniot, Rawalpindi and Peshawar being dead since long are required to be revived as per modern lines.
- A shift from traditional furniture to manufacturing furniture as per modern trend is need of the time and awareness through the concerned association is important.