CLUSTER PROFILE
WOODEN FURNITURE CLUSTER
RAWALPINDI

Turn Potential into Profit

Small & Medium Enterprise Development Authority
Ministry of Industries, Production & Special Initiatives
Government of Pakistan
http://www.smeda.org.pk

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1 Description of Cluster

Rawalpindi is a city in the Potwar Plateau near Pakistan's capital city of Islamabad, in the province of Punjab. The area was home to the pre-historic Soanian culture indigenous to this region. Numerous and endless shopping bazaars, parks and a cosmopolitan population attract shoppers from all over Pakistan and abroad. Rawalpindi is located in the Punjab province, 275 km (171 miles) to the north-west of Lahore. It is the administrative seat of the Rawalpindi District. City is about 108 square kilometres (42 sq mi). The City-District of Rawalpindi comprises seven autonomous tehsils; Rawalpindi, Gujar Khan, Kahuta, Kallar Syedan, Kotli Sattian, Murree and Taxila Tehsil.

Over the years, Rawalpindi has retained its traditional culture, though it has been extensively modernized since the creation of Pakistan in 1947. The bazaars of the old city are famous for quaint old shops in Saddar bazaar, Moti bazaar, Raja bazaar and Kashmiri bazaar. Rawalpindi has long been a major market for exports from Kashmir and the North-West Frontier Province. The bazaars specialize in handicrafts such as inlaid sheesham and walnut furniture, Kashmiri silver, shawls and jackets, embroidered and woollen kurtas and household linen, potohar shoes and chappals, cane baskets and furniture, walking sticks, and hand-woven Kashmiri and Bokhara carpets.

Rawalpindi is one of the important cities of Pakistan. After the weakening of Mughal dynasty in India, Sikhs came into power and settled here in 1765. They invited the nearby traders to Rawalpindi which later on proved to be a significant milestone in the history of the city. As the city gradually became a trade hub due to its location between the Punjab and Kashmir. During the Raj days it became biggest cantonment in Sub-continent. It is a railroad junction and an important industrial and commercial center.

Rawalpindi industrial base is diverse. The main industry includes oil refinery, industrial gas processing, steel re-rolling, iron mills, railroad yards, brewery, sawmills flour mills, beverages and fruit preservation, cigarettes, pharmaceutical, furniture, glass products, marble processing, sewing machines, pottery, leather goods and textile & hosiery units etc.

1.1 History & Background of Cluster

Quality furniture is a necessity that also adds value to the surroundings due to its decorative aspect. This industry is a multidimensional, comprising a multitude of trades and sub-industries. The wood-work industry exists on various scales i.e, large, medium or small all across the country. The industry over time has developed progressively yet in economic terms it still exists as a cottage industry. Although in the last two decades, this industry has considerably progressed especially in manufacturing of value added products on modern lines, however this development is limited to only few large scale manufacturers endowed with indigenous tools and modern implements.

The wood used in furniture making generally comprises of Sheesham, Chirh, Pine, Oak, Burma Teak, Plywood, Kekar and Bamboos. Recently, chipboard is also extensively used for this purpose. Another popular medium nowadays is cane.

In Pakistan, the regional designed furniture has its peculiar identity and huge demand in foreign market. Majority manufacturers in major cities are also pursuing amalgamation of traditional designs with the modern ones, thus furniture-making in Pakistan has progressively assumed newer dimension. The furniture manufacturers in Rawalpindi are operating in isolation and the networking among stakeholders is very minimal. There is no formal regional association of furniture manufacturers in Rawalpindi.

1.2 Defining the Products

There is large number of products made by the wood. Few can be defined as under.

- **Sofa**: an upholstered seat for more than one person
- **Bed:** piece of furniture that provides a place to sleep
- **Chair:** a seat for one person, with a support for the back
- **Cupboard:** a cabinet used for storage space

Table 1: SITC & HS Codes for Wooden Furniture

PRODUCT	SITC CODE	HS CODE
Office Furniture	82151	9403-30
Kitchen Furniture	82153	9403-40
Bedroom Furniture	82155	9403-50
Other Furniture	85159	9403-60

1.3 Geographical Location

The geographical location of the cluster is Rawalpindi comprising of six markets. Mainly manufacturing and showrooms are on Kuri Road (Sultan Da Khoo), Kuri Road (Sadiqabad), Muree Road (Shamsabad, Faizabad), Chaklala Road, Khanna Road and Hazara Colony. How ever furniture cluster in Rawalpindi cover wide area. Target market of Rawalpindi Furniture Cluster is covering all its surrounding districts and regions i.e. NWFP Province, Jehlum, Chakwal, Attock, Muree, Kashmir, Northern areas.

1.3.1 Area and Population

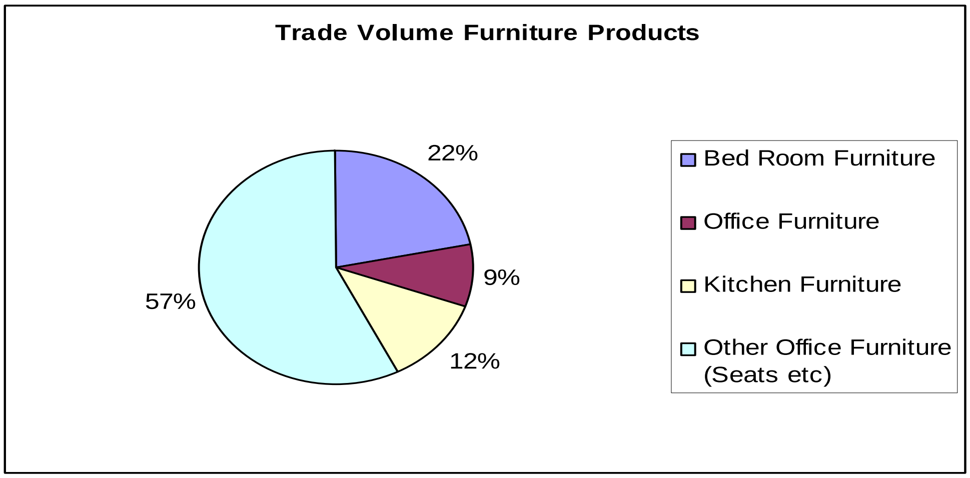
According to 1998 Population and Housing Census, total population of Rawalpindi district is 3,039,550 persons.

1.4 Current Scenario

Wooden furniture is manufactured in Pakistan by a large number of industries, spread over rural areas, small towns and cities. The industry can be divided into two main types; cottages and small-scale industry. These units, which are not mechanized, use out-dated tools and employ manual labor for the production of furniture.

Pakistan's tradition of wood-carving has been considerably enriched by the continuing addition of new furniture designs, as these furniture makers keep themselves well acquainted with the latest designs. The demand for furniture has been rising constantly at approximately 10% for the domestic market, as well as for export purposes. However, there is a need to further explore the international market for boosting exports, as there is still a huge prospective for increasing the market for the Pakistani furniture.

Pakistan's share in the total world market is quite negligible, and there are bright prospects for increasing this share. Only one furniture manufacturer from Rawalpindi Cluster is contributing in Pakistan's exports. Major buyers for Pakistani furniture products are UAE, Saudi Arabia, Sri Lanka, USA, UK, France, Canada, Italy, Germany, Kuwait, etc.



1.5 Core Cluster Actors

1.5.1 Total Number of Manufacturing Units

According to the estimates provided by industry sources, Rawalpindi furniture cluster is comprised of about 2000 units. These units can be categorized into micro, small and medium sized units.

Following table indicates the industry size in various categories:

Table 2: Industrial Structure

Small & Medium	Micro
400	1600

1.5.2 Types of units

The details of the different categories of the furniture manufacturing units are following:

Micro Sized Units

According to the statistics provided by the industry, there are about 1600 micro sized units involved in the business of furniture manufacturing. This number includes all the units that are either directly or indirectly involved in the furniture manufacturing. These units are vertically integrated and are involved in the different stages of furniture manufacturing. The furniture manufacturing units are selling their products in semi finished and finished form in Rawalpindi as well in the other cities. Some of these units also have organized themselves in specialized products manufacturing, (e.g. a unit producing chairs will only produce chairs).

The small-scaled units can be further divided into:

- Saw Mills
- Furniture Manufacturers
- Upholstery Units
- Polishing & Finishing Units

Small & Medium Sized Units

Rawalpindi furniture cluster consists of about 400 small and medium sized units. These units manufacture furniture themselves as well as depend on the micro sized units for their manufacturing requirements. Small size units buy the semi finished furniture from micro sized units and then finish these products. These units have their own show rooms to display their finished products. Most of their sales are domestic but few of them are also involved in the exports. These units have workers ranging from 15 to 50 in number depending upon the amount of work. These units sometimes also hire workers on contract basis in case of more orders.

1.5.3 Employment Generation

The industry is labor intensive and concentrated in small, medium and micro size units generating almost 50,000 individuals ranging from 5-10 workers in small and micro size units. These 50,000 individuals are involved with furniture industry directly or indirectly. These persons can be divided into the categories of carpenters, polishers, upholstery workers and the general laborers. As far as the training of this work force is concerned, there is no specialized training institute for furniture workers in Rawalpindi.

1.5.4 Total Production

The estimated annual wood consumption is around 100,000-200,000 cubic ft. The average cost of this wood is around Rs. 80 million calculating on the basis of 400 rupees per cubic foot on an average type of wood. According to industry sources the estimated growth rate is around 10%.

1.5.5 Capacity Utilization

Capacity utilization of the existing unit is insufficient to meet the demand of the domestic market. It is below 50%. None of the unit has the capability to produce goods at mass level. Even the medium sized units take minimum 3-4 months for an order. Sufficient gap exists and it is increasing day by day with the increase in the population of the country.

1.6 Other Cluster Actors

Following are the supportive actors of the cluster.

1.6.1 Hard Board/Plywood/Chip Board

Hard board, plywood and chip board are also used in the manufacturing of the furniture. The supply sources of these items to Rawalpindi cluster are the different plywood factories in district Rawalpindi, Gujrat and Jehlum. These factories include KDC Plywood Factory Jhelum, National Plywood Factory Jehlum, Chenab Particle Board Alipur Chatha, Plyfo Industries Alipur Chatta, Islamabad board Hattar. These items are sold on the hardware shops in Rawalpindi.

1.6.2 Foam & Cloth

Foam and Cloth are used in sofa sets, chairs and the bed sets. These are 15-45% of the total quantity of raw material used in the furniture manufacturing.

1.6.3 Glue/Nails/Screws/Accessories

These items are about 5% of the total raw material used in the furniture manufacturing. These are also sold at the hardware stores in the city. There are different varieties of the accessories available in the market. These include local as well as foreign made accessories.

1.6.4 Paint/Polish/Other Related Material

These include about 15% of the total raw material used in the furniture manufacturing. These materials are available at the hardware stores as well as the agents of the different companies sell these materials directly to the furniture manufacturers.

1.7 Sales Distribution Channels

There are different sales distribution channels of furniture industry of Rawalpindi. The medium sized and the small sized units have their showrooms on the Muree road, Kurri Road and Sultan Da Khoo. The micro sized manufacturers don’t have their own showrooms, so they are dependent on the other two categories for their furniture sales. Around 10% of the total furniture manufactured is sold in Rawalpindi. The rest 90% of the furniture is sold in the other areas like NWFP, NA, Azad Kashmir,Attock, Chakwal, Jhelum, Islamabad etc. Medium sized units have made their sales points/showrooms in Islamabad & Rawalpindi and certain other cities. Most of the furniture that is sent to the other cities is sold to the traders who have their own showrooms. A small quantity of furniture is also exported to different countries but this export is dependent on the personal contacts of the manufacturers.

1.8 Current Cluster Scenario

The estimated overall furniture sale from Rawalpindi is about Rs.250 million per annum. This figure is gradually increasing with the increasing demand and quality consciousness of the consumers.

At the moment, a few of the local furniture manufacturers are exporting furniture items to the individual clients in UK, US, Saudi Arabia and Middle East. China and India are the major competitors. Their prices are less and quality is better.

Sheesham wood which is basic raw material is short in supply to fulfill the local market requirement. This shortage has caused a price hike. There is no schedule rate of wood in the market.

2 Analysis of Business Operations

The furniture manufacturers of the Rawalpindi cluster are making all kind of furniture products that includes household furniture items, office furniture as well as industrial furniture (in small quantities).

2.1 Household Furniture Items

Household furniture items manufactured in Rawalpindi include bed sets, sofa sets, tables, chairs, cupboards, showcases and handicrafts as well. These articles are based on the different designs that include Traditional Pakistani, Victorian, Italian, French and American designs. But in most of the cases, manufacturers just copy the designs from different international furniture catalogues. But in most of the cases these furniture items are not based on actual specification and standards, so there is no uniformity of standards in the final products.

- Bed room furniture
- Dining room furniture
- Living room furniture
- Drawing room
- Dressing room furniture

2.2 Office Furniture

Office furniture is also manufactured in small quantities in Rawalpindi furniture cluster. The office furniture includes office tables, conference tables, chairs, cupboards, computer tables, etc.

2.3 Industrial Furniture

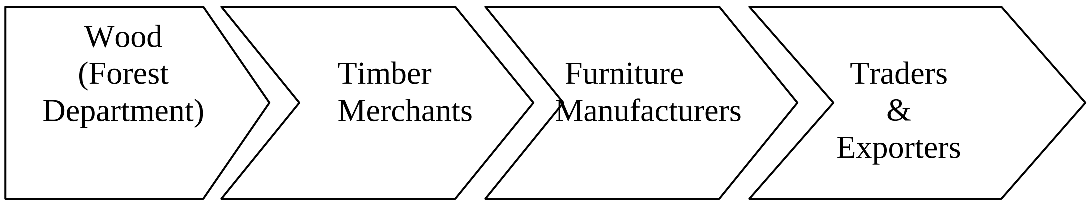
A few furniture manufacturers of Rawalpindi are also involved in the manufacturing of industrial furniture that includes, school furniture, laboratory furniture, factory furniture etc.

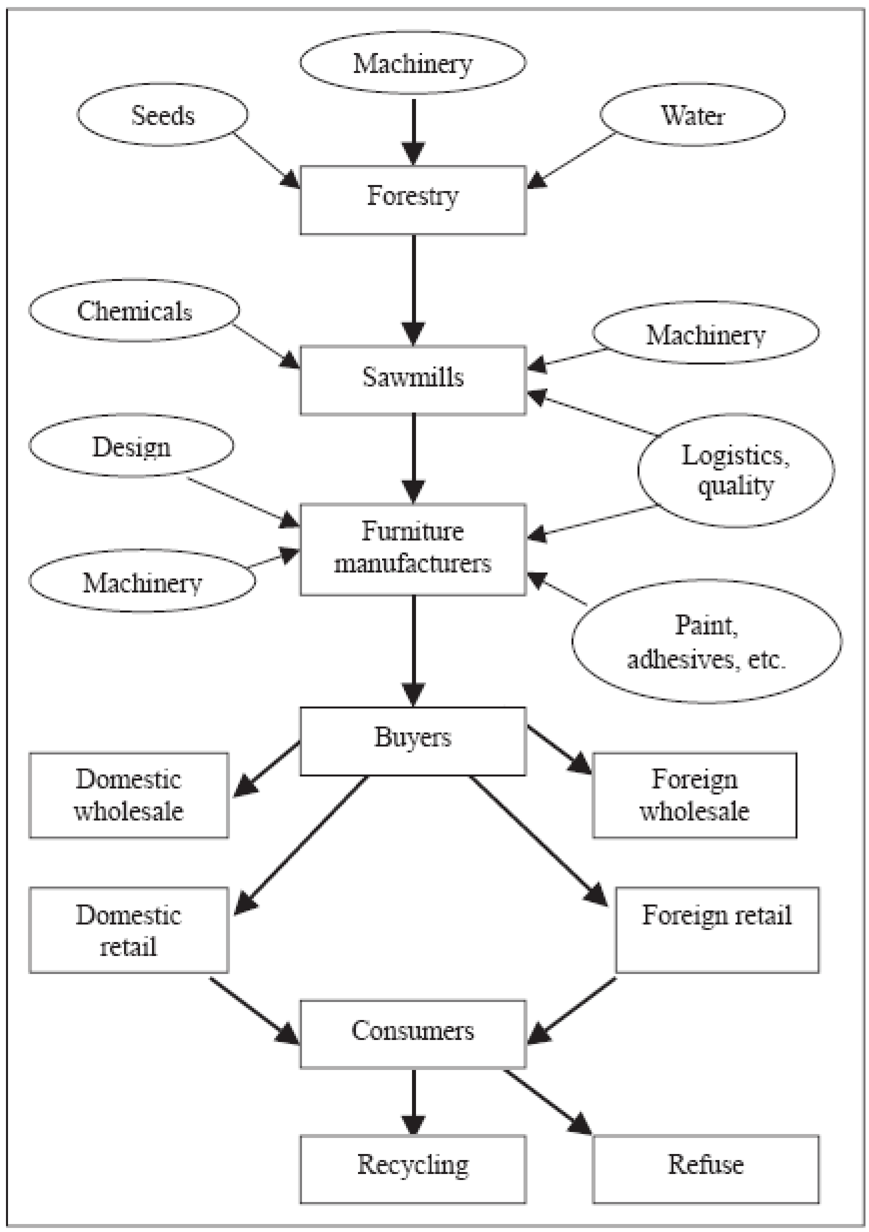
Table 3: Product Mix

Major Product Lines	Articles	% age
Household Furniture	Bed sets, Sofa sets, Tables, Chairs, Cupboards etc.	80%
Office Furniture	Office tables, Chairs, Computer tables, Cabinets etc,	15%
Industrial Furniture	School furniture, Laboratory furniture, Factory furniture etc.	5%

2.4 Value Chain

Wooden Furniture value chain includes all the value addition steps involved in the manufacturing and distribution of furniture from raw material to the end user. These steps are following:





2.5 Production Operation (Process flow)

The standard manufacturing process of the wooden furniture includes the following steps:

Table 4: Description of Production Process

Step No	Description	Machinery Required/Used
1	Wooden logs are purchased from timber merchants	
2	Logs are cut into Planks	Band Saw, Circular Saw
3	Planks are seasoned either naturally or in the seasoning plant	Natural seasoning requires 6 months to year/artificial seasoning takes 8-20 days
4	Drawings and the specification of the furniture item have to be drafted.	
5	Cross cutting of planks according to the specification/drawings	Circular Saw
6	Machining of the cross cut planks into the required sizes	Jointer Planner, Thicknesses planner, Tenoning machine, mortising machine, sanding machine
7	Joining of the different parts to assemble the article	Glue is used, Hydraulic Press is used for extra strength of joints
8	Finishing the item polishing/painting etc.	Air compressor, Sprayers etc.

Furniture industry of Rawalpindi is partially or not completely following all these steps which have been identified in the table above. The reason is that each manufacturing unit has developed its own production process/steps according to the product, number of workers, machinery and other factors. This affects the quality of the product.

2.6 Raw Materials

The raw materials used in furniture manufacturing are following:

Table 5: Raw Material

Material	%age use	Used in	Availability
Wood	50%	All furniture items	Local Timber Merchants
Hard Board / Plywood / Chip Board	25%	All furniture items	Hardware stores/Plywood factories in the area
Steel/Metal Frames	5%	Items like chairs, Tables	Locally produced by metal works
Foam	10%	Chairs, Sofa sets, bed sets	Agents in Local Markets
Cloth	5%	Upholstery of sofas, chairs	Agents in Local Markets
Glue	1%	All furniture items	Hardware stores

Nails/Screws	1%	All furniture items	Hardware Stores
Polish/Paint/Other related material	5%	All furniture items	Hardware stores/ Company Agents
Accessories	3%	All furniture items	Hardware Stores

The wooden furniture manufacturing industry Rawalpindi is famous for quality furniture manufacturing of solid wood. The basic raw material used for this type of furniture is Sheesham wood. Besides this, Medium Density Fiber (MDF) is also used in furniture manufacturing.

Sheesham wood is mostly used in furniture manufacturing, however other kinds like Keekar (Acacia), Walnut, Diar, Pine etc. are also used but in lesser quantities or on special orders.

Other raw material items like foam, cloth, nails, glue etc. are easily available in the market.

2.6.1 Kinds of Woods;

Following different types are available to the cluster

- Sheesham
- Deyodar
- Popular
- Pertal
- Chilgoza

The woods that are fashioned into furniture fall into following three categories:

1. Hardwoods
2. Softwoods
3. Composites

Technically, furniture made from all of these wood products is "real" wood furniture, even the composites. Prices and quality range from the hardwoods down to the composites. The higher you go up the spectrum, the more you can expect to pay for your wood furniture. The good part, of course, is that with proper care hardwood furniture will last for decades or even generations. If you can afford it, always choose hardwood furniture.

2.7 Technology Status

Except a few units technical standard of all others is of a very low level. The furniture manufacturers are using only four basic machines to cater their machining requirements. These machines include circular saw, thicknesser planner, spindle molder and the mortising machine. Although these machines can be used to fulfill the machining requirements but excellent quality can not be achieved without the proper machines and the machining techniques. Most of the manufacturers don’t have the sanding machines that also affect the furniture quality.

The second problem related to machinery is that most of the machinery used in manufacturing is Pakistan made. The final quality of products manufactured on this machinery can not be compared with the products made by foreign machinery. So there is a need to improve the design and the working of Pakistani machinery according to the requirements. By improving the local machinery, a huge quantity of foreign exchange can be saved and this will also help the light engineering sector. Non-availability of seasoning plants is another problem.

2.8 Quality Assurance (Quality standards and Certifications)

So for none of the furniture unit is ISO Certified in Rawalpindi.

2.9 Market Mechanism

Furniture is sold to the domestic consumers at the showrooms of either manufacturers or the traders. The manufacturing concerns have their own show rooms while the small manufacturing units depend on the traders having showrooms for the sales of their products.

The export of furniture items from Pakistan is negligible in the case of quantities. In most of the cases the furniture exports from Pakistan are done on the basis of personal contacts. There are no standard designs of the Pakistani furniture products. The furniture items in small quantities, customized according to the requirements of the buyers, are exported from Pakistan.

2.10 Financing/ Banks and Financial Institutions

At present, none of the financial institution has developed/offered any lending scheme for the development of Furniture Sector. The financial products available in the market are not geared to cater the requirements of this sector. Access to equity and finance is the most malicious constraint to cluster growth and development. Commercial banks apply conservative policies while lending.

High transaction costs, collateral requirement, no customized financial products incorporating cluster needs, along with high mark up rates discourage entrepreneurs to opt for formal financing. Entrepreneurs are bound to full fill their financing needs from informal sector by paying exorbitant markup rates going as high as 30% annually.

2.11 Human Resources

The education level of workers/labor working in this cluster is very low, which is a major hindrance in learning and accepting new tools and techniques.

2.11.1 Shortage of skilled manpower

The workforce employed in furniture industry is either un-skilled or semi-skilled. Mostly the workers acquire on-job training that result in manufacturing of low quality products and increasing the lead time. Consequently the units have to outsource their production to other craftsmen thereby increasing the cost and delay in fulfillment of production order.

2.11.2 SMEs not willing to invest in human resource development

As most of the establishments in furniture sector are SMEs, therefore they are mostly hesitant to invest in human resource development. The reasons for not investing in human resource development are; lack of awareness of importance of concept of human resource development and financial constraints.

2.11.3 Few Facilities of Vocational Training

Presently there are limited facilities of vocational training furniture industry. There are furniture training institutes at Rawalpindi. Moreover, these institutions are not abreast with the latest developments across the globe. The curriculum is obsolete and has not been updated since ages. There is one Punjab Small Industries Institute in Rawalpindi.

PSIC WOOD WORKING CENTRE	Tipu Road,Moti Mahal Cinema Rawalpindi Ph. # (92-51) 9280759

2.11.4 Lack of Design Innovation

Innovative and good design can make a significant contribution towards improving productivity and competitiveness. The design component gains paramount importance in view of consumers becoming increasingly design conscious. Pakistani furniture industry lacks design innovation due to unavailability of latest information on new designs and absence of skill among the manpower to copy such designs.

2.12 Entrepreneurs Associations

There are two unregistered furniture associations present in the Furniture Cluster of Rawalpindi. These associations are:

- All Pakistan Furniture Makers Association
- Furniture Dealers Association, Rawalpindi

2.13 Govt./Semi Govt. Support / Educational Institutions

There are a number of the Govt./Semi Govt. organizations working in collaboration with the furniture cluster of Rawalpindi for the uplift of the cluster.

2.13.1 SMEDA

Small and Medium Enterprise Development Authority was formed in October 1998 with a sole purpose of developing SMEs in the country. It has a Regional business centers (RBCs) in various cities of Punjab including Rawalpindi. These RBCs provides following services to SMEs

i) Identification of Investment Opportunities

ii) Facilitation in arranging finance from financial institutions

iii) Training programs

iv) Marketing advice.

v) Technical advice.

vi) Legal Services

vii) Business plan development.

viii) Common facilities centers.

2.13.2 Trade Development Authority of Pakistan (TDAP)

Trade Development Authority of Pakistan (TDAP) has a mandate to promote local products in international markets. It has reserved a special quota for SMEs (20%) in all the international trade exhibitions, trade delegations, trade conferences which it arranges.

2.13.3 Punjab Small Industries Corporation (PSIC)

Punjab small industries corporation is a provincial department which supports the establishment of small and cottage industries in the province of Punjab. It offers helps in following areas

i) Offering credit facilities to small and cottage industries (new and existing businesses).

ii) Establishing industrial areas for small industries.

2.14 Private BDS Providers (Consultants)

Cluster is unfortunate in this respect and there in no private BDS provider in the Cluster. Majority of consultancy firms from other cities provide services in ISO 9000: 2004, etc certifications. There is an absence of BDS in productivity management, marketing and sales, HR development, software, etc.

3 Major Players

Major players of wooden furniture cluster Rawalpindi are listed in table given below:

Table 6: Major Players

Sr.	Organization	Address
1	Decent Furniture	150-A,Lane No.2, Peshawar Road, Rawalpindi
2	Tarkhan Furniture	Near Shamsabad, Muree Road
3	Karigar Furniture	Near Shamsabad, Muree Road
4	Living Heritage	50-A, Aliabad, Peshawar Road
5	Art Land Furniture	913, Muree Road
6	Super Abbasi Furniture	Kurre Road, Chah Sultan
7	Stylish Furniture	Kurre Road, Chah Sultan
8	Dynamic Impex,	Flat No.3,Al-Hafeez Plaza, PIA Colony, Main Range Road

4 SWOT Analysis

4.1 Strengths

- Skilled Labor Force
- Wood seasoning facility centre is available
- Suppliers of raw material are available
- Local tools available
- 350 furniture manufacturing units
- 8,000 people (approx.) are directly and indirectly attached with this occupation
- Strong historical background of craftsmen
- Many big cities are link-up with this cluster including Islamabad, Attock, Jhelam, Chakwal and NWFP etc.

4.2 Weaknesses

- High cost of production due to high rate of raw material
- Lack of educated, certified and professionally trained, work force
- Unavailability of ready to use raw material
- No Designing and R&D facilities available
- Unawareness of Social compliance and Environmental issues
- Unawareness of any quality control and standards
- Lack of international marketing skills
- Unavailability of ready-to use seasoned wood
- Constraint of Technology
- Fluctuating prices of the raw material.

4.3 Opportunities

- Technical up gradation
- International exhibitions
- International warehouses
- Rebate facility of 25% on transport charges for exporters.
- Networking & linkages of cluster players/stakeholders
- Development of consortiums with specified objectives

4.4 Threats

- Migration of trained work forces from the sector

- Raw material cost increase (shortage in the stock of Sheesham wood at any stage because no further plantation as required)
- Import of low price articles from China and India
- Instable political set up of the country.

5 Investment Opportunities

The investment opportunities prevailing in this cluster are as follows:

- Chip/Hard Board Manufacturing
- Win Board Manufacturing
- Particle/Veneer Board
- Flush Doors/Windows
- Small wood seasoning plant
- Furniture Design Center

5.1 Contact for further information

For any further information/clarification please contact Regional Business Center at following address:

SMEDA Regional Business Centre
C/o Rawalpindi Chamber of Commerce and Industry
39-Civil Lines, Mayo Road
Rawalpindi
Phone: (92 51)9273020
Fax: (92 51) 5111055,
Email: faisal@smeda.org.pk

6 Annexure I: List of Pre-feasibility Studies

List of pre-feasibility studies developed by SMEDA related to furniture sector are given in table below

Annexure 1: Cluster Related list of Pre-feasibility Studies

Serial	Title of Pre-feasibility Studies
1.	Wooden Furniture Manufacturing Unit
2.	Computerised pattern Designing - Furniture
3.	Chip Board Manufacturing Unit

These feasibility Studies can be downloaded from website of SMEDA (www.smeda.org.pk)