

Performance And Potential Markets for Timber & Timber Based Products In The Middle East and North Africa Region

Key Products & Trade Statistics

Malaysia: Export of Major Timber Products to UAE, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|----------------------|------------|--------|-----------|--------|-----------|--------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 80,594 | 111.83 | 72,505 | 109.49 | 80,358 | 121.35 |
| Plywood | 71,339 | 93.45 | 36,999 | 50.12 | 55,839 | 78.59 |
| Particleboard | 5,306 | 4.61 | 4,858 | 4.14 | 6,908 | 4.94 |
| Fibreboard | 227,273 | 126.56 | 139,940 | 113.43 | 153,347 | 134.32 |
| BCJ | 12,982,633 | 24.76 | 5,255,739 | 10.78 | 5,000,992 | 10.66 |
| Furniture* | n/a | 206.71 | n/a | 206.66 | n/a | 216.66 |

Source: MTIB

* Wooden & Rattan



Malaysia: Export of Major Timber Products To Saudi Arabia, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|-------------------|---------|--------|---------|--------|-----------|--------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 35,870 | 62.20 | 41,728 | 89.23 | 46,414 | 97.08 |
| Plywood | 26,854 | 33.21 | 17,312 | 23.36 | 26,735 | 36.99 |
| Fibreboard | 62,695 | 68.27 | 105,596 | 93.13 | 84,836 | 81.11 |
| BCJ | 621,147 | 2.18 | 833,693 | 2.98 | 1,160,576 | 11.94 |
| Furniture* | n/a | 123.04 | n/a | 123.93 | n/a | 145.73 |

Source: MTIB

* Wooden & Rattan

Housing Project, Riyadh



Malaysia: Export of Major Timber Products To Qatar, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|-------------------|---------|-------|---------|-------|---------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 9,708 | 14.39 | 14,130 | 22.47 | 11,921 | 17.69 |
| Plywood | 8,095 | 10.30 | 3,800 | 5.26 | 4,848 | 6.99 |
| Fibreboard | 8,047 | 8.26 | 11,617 | 9.04 | 11,345 | 10.13 |
| BCJ | 126,468 | 0.55 | 622,652 | 6.18 | 579,244 | 5.47 |
| Furniture* | n/a | 37.59 | n/a | 24.11 | n/a | 19.51 |

Source: MTIB

* Wooden & Rattan

Dukhan Township, Qatar



Malaysia: Export of Major Timber Products To Kuwait, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|-------------------|---------|-------|--------|-------|--------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 14,300 | 26.80 | 13,745 | 24.74 | 12,046 | 20.13 |
| Plywood | 5,391 | 6.68 | 4,271 | 6.03 | 3,970 | 6.14 |
| Fibreboard | 30,227 | 31.18 | 44,643 | 39.36 | 39,632 | 36.95 |
| BCJ | 164,375 | 0.90 | 13,423 | 0.06 | 57,102 | 0.42 |
| Furniture* | n/a | 42.24 | n/a | 40.96 | n/a | 38.87 |

Source: MTIB

* Wooden & Rattan

Kuwait Trade Centre



Malaysia: Export of Major Timber Products To Bahrain, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|-------------------|---------|-------|--------|-------|--------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 14,300 | 26.80 | 13,745 | 24.74 | 12,046 | 20.13 |
| Plywood | 5,391 | 6.68 | 4,271 | 6.03 | 3,970 | 6.14 |
| Fibreboard | 30,227 | 31.18 | 44,643 | 39.36 | 39,632 | 36.95 |
| BCJ | 164,375 | 0.90 | 13,423 | 0.06 | 57,102 | 0.42 |
| Furniture* | n/a | 42.24 | n/a | 40.96 | n/a | 38.87 |

Source: MTIB

* Wooden & Rattan



Malaysia: Export of Major Timber Products to Oman, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|----------------------|--------|-------|--------|-------|---------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 42,393 | 48.88 | 37,106 | 49.02 | 51,806 | 63.08 |
| Plywood | 14,653 | 19.20 | 6,216 | 8.79 | 17,881 | 26.48 |
| Particleboard | 2,577 | 2.29 | 2,451 | 2.07 | 2,425 | 2.11 |
| Fibreboard | 26,232 | 24.78 | 24,326 | 19.01 | 25,965 | 22.18 |
| BCJ | 65,831 | 0.15 | 20,910 | 0.13 | 271,640 | 1.85 |
| Furniture* | n/a | 18.29 | n/a | 17.79 | n/a | 23.96 |

Source: MTIB

* Wooden & Rattan

Remal Castle, Al Khuwair



Malaysia: Export of Major Timber Products to Lebanon, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|----------------------|--------|-------|--------|-------|---------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Sawntimber | 36 | 0.08 | 111 | 0.26 | 143 | 0.23 |
| Plywood | 1,907 | 2.61 | 2,478 | 3.84 | 1,279 | 2.06 |
| Particleboard | 1,334 | 0.76 | 246 | 0.16 | - | - |
| Fibreboard | 14,404 | 15.02 | 27,301 | 25.33 | 11,180 | 11.24 |
| BCJ | 75,274 | 0.43 | 34,065 | 0.23 | 147,056 | 0.48 |
| Furniture^ | n/a | 20.02 | n/a | 14.46 | n/a | 13.96 |

Source: MTIB

* Wooden & Rattan

Water Front City, Beirut



Malaysia: Export of Major Timber Products to Iran, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|-------------------|---------|--------|---------|-------|------------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| Fibreboard | 156,040 | 148.83 | 49,902 | 41.37 | 49,325 | 43.46 |
| BCJ | 175,623 | 1.01 | 208,167 | 2.33 | 115,740.00 | 0.59 |
| Furniture* | n/a | 5.09 | n/a | 4.01 | n/a | 2.55 |

Source: MTIB

* Wooden & Rattan



Malaysia: Export of Major Timber Products to Algeria, 2012 – 2014

Volume (m3), Value (RM million)

| Main Products | 2012 | | 2013 | | 2014 | |
|---------------|---------|-------|---------|-------|---------|-------|
| | Volume | Value | Volume | Value | Volume | Value |
| BCJ | 113,593 | 0.21 | 157,421 | 0.39 | 356,884 | 1.04 |
| Furniture* | n/a | 87.57 | n/a | 77.92 | n/a | 74.71 |

Source: MTIB

* Wooden & Rattan

Housing Construction in Algiers



Potential Markets in the Middle East and North Africa Region

Malaysian Exports to UAE

- Sawntimber imports increased by 10.8 percent in 2014 over the previous year. Prospects for Kempas, Balau, Merbau besides the best seller - Red Meranti.
- Commercial plywood registered an increase by 50.9 percent in 2014. Good prospects for thin panel hardwood core plywood.
- Fibreboard imports increased by 18.4 percent in value terms over the year 2013.
- Particleboard imports registered an increase of 19.6 percent in 2014 over the previous year. Hollow core particleboard in demand for flush door fabrication by joinery workshops in UAE.
- BCJ products imports continued of doors and flooring despite a drop of 1 percent in 2014 over the previous year..
- Furniture saw a increase of 4.8 percent in 2014. Steady demand of Malaysian (dining sets & bedroom sets) and office furniture.

Malaysian Exports to Saudi Arabia

- Sawntimber registered an increase in imports by 8.8 percent in 2014 over the previous year. Red Meranti in high demand for doorframes and interior panelling.
- Plywood registered an increase by 58.4 percent in 2014 over 2013. Good demand for thin and thick panel commercial plywood.
- Fibreboard decreased by 12.9 percent in value terms over the year 2013. Strong competition from Thailand, Sri Lanka and China due to light colour (Thailand) boards and lower pricing.
- BCJ imports rose sharply by 300 percent. Large imports of doors, flooring, cornice, skirting, balustrades and other interior décor products
- Furniture imports increased by 17.4 percent in 2014. Good demand for home and office furniture.

Malaysian Exports to Qatar

- Malaysian timber faced strong competition from Okoume and Beech sawntimber as exports decreased by 21 percent in 2014 over the previous year.
- Plywood imports registered an increase of 33 percent in 2014 over 2013. Good demand for thin and thick panel commercial hardwood core (MR Glue) plywood.
- Fibreboard increased by 12.2 percent (2014) in value terms over the year 2013. Some government and luxury residential and commercial buildings also require certified MDF. Rising demand for fire rated MDF for specific projects.
- Furniture imports reduced by 18.9 percent in 2014. Commercial offices require high quality chairs and workstations for growing workforce.
- Qatar nationals have one of the highest per capita income in the world. Buyers are looking for home furniture with new designs, colour schemes and extra features in wardrobes, bedroom sets to compliment the interior décor.

Malaysian Exports to Oman

- Malaysian Red Meranti, Mixed Light Hardwood registered an increase intake by 28.7 percent in 2014 over the previous year.
- Plywood imports jumped by over 200 percent in 2014 over 2013 primarily due to increase in consumption by construction sector and also wood based joinery workshops in Oman.
- Fibreboard increased by 16.7 percent in 2014 over the previous year. Malaysian MDF is in high demand in Oman.
- Particleboard imports increased by 1.9 percent in 2014. Fire rated and hollow core particleboard is required for doors and some furniture applications.
- BCJ imports rose by 1,338 percent, primarily for some government projects which require premium flooring and interior décor products besides wooden doors.
- Furniture imports increased by 29.5 percent in 2014 over the previous year. Home, office and outdoor furniture is required despite the presence of furniture manufacturers in Oman.

Malaysian Exports to Bahrain

- Sawntimber imports increased by 18 percent in 2014 over the previous year. Malaysian hardwoods are popular in Bahrain.
- Plywood imports rose sharply by 53 percent in 2014. Good demand for hardwood core plywood.
- Fibreboard increased by 37.7 percent in 2014 over the year 2013. Malaysian MDF faces strong threat from Thailand based suppliers.
- BCJ imports increased by 55.5 percent in 2014, good demand for wooden doors and interior panelling products for residential buildings in Manama.
- Mouldings are imported for some specific construction projects in Bahrain.
- Furniture reported an increase of 59 percent in 2014 over the year 2013. Good demand for imported home and office furniture in Bahrain.

Malaysian Exports to Lebanon

- Kiln-dried sawntimber is mostly imported for ready application by joinery workshops in Lebanon.
- Plywood imports dropped sharply in 2014 due to decline in Euro currency which favoured increase in imports from Europe.
- High demand for melamine chipboard popularly known as 'MFC' in Lebanon.
- Fibreboard decreased by 55 percent in 2014 over 2013. MDF size: 6' x 12' beside the regular (4' x 8') MDF was supplied in large volumes from Thailand. European MDF suppliers took advantage of lower Euro currency & freight to ship large volumes.
- BCJ imports rose sharply by 108 percent in 2014. Wooden flooring is popular in Lebanon. Lebanon exports to African countries (Algeria, Libya, Gabon, Nigeria, Kenya).
- Malaysian home and outdoor furniture is popular in Lebanon. European and Asian (China & Vietnam) suppliers are key suppliers to Lebanon.

Malaysian Exports to Iran

- Fibreboard imports registered an increase of 5 percent in 2014 over the previous year. Size: 6' x 12' of 16mm thickness is quite popular in Iran, used by lamination units.
- BCJ imports dropped sharply (74 percent) in 2014 over the year 2013. Iran has carpentry and small joinery workshops in many cities which require BCJ products for interior furnishings.
- Furniture declined by 36 percent in 2014 over the previous year as importers faced difficulty in sending remittances to suppliers in Malaysia.
- The recent deal signed between six world powers and Iran should facilitate easier imports into Iran in the near future.

High Growth Products

Timber & Panel Products

1. Sawntimber

- Red Meranti – doorframes and interior decoration
- Kempas – dhows construction
- Balau – pergolas, gazebos and outdoor decking

2. Plywood

- Commercial Hardwood Core Plywood – various thicknesses
- Phenolic Film Faced Plywood (12mm & 18mm) black and brown colour – MENA region

3. Fibreboard

- Fire Retardant (FR) MDF – UAE & Qatar
- Certified PEFC/ FSC (E1 Grade) MDF – UAE, Qatar and Lebanon
- No Added Urea Formaldehyde (NAUF) Boards – UAE & Qatar

Panel & BCJ Products

4. Particleboard

- Hollow-core particleboard – 38mm & 44mm (flush doors)
- Melamine particleboard – 17mm (Lebanon)
- Fire retardant particleboard – 38mm, 44mm (door core)

5. Veneers

- Natural veneers of 0.6mm thicknesses up to 4 metres length.
- Popular species are Walnut, Oak, Ash, Teak, Wenge, Sapele, Mahogany.
- Reconstituted Veneers

6. BCJ

- Wooden Doors (solid wood and panel doors)
- Flooring – HDF laminated flooring in high demand in MENA countries
- Premium wood flooring (solid and engineered) – Oak, Maple, Teak, Walnut, etc. of grey, brown and light colours.

Furniture

7. Home Furniture

- Bedroom sets with matching wardrobes, side tables, drawers
- Accessories and fittings incorporated in wardrobes, bed-sets
- Dining table sets of 6, 8 and up to 14 chairs (Saudi Arabia, UAE and Qatar).
- Wardrobes with sliding doors to match with bed sets.

8. Office Furniture

- Ergonomically designed high quality executive chairs
- Work stations to seat 1 – 4 staff with compact designs and in-built storage space.
- Conference table 8 – 14 seating with modern amenities.

9. Outdoor Furniture

- Treated wood furniture for garden/ patio such as sofa sets, reclining chairs, dining table sets.
- Synthetic Rattan/ PVC furniture for extreme weather conditions/ requiring less maintenance.

Proposed Promotional Activities in 2016

Promotion Activities in 2016

1. Market Visits

- Kuwait (January 2016)
- Oman (February 2016)
- Saudi Arabia in conjunction with The Big 5 Exhibition (March 2016)
- Qatar in conjunction with Project Qatar Exhibition (May 2016)
- Lebanon (June 2016)
- Iran in conjunction with Iran Confair Exhibition (August 2016)
- Jordan (September 2016)
- Bahrain in conjunction with Gulf Wood Exhibition (October 2016)
- Algeria (December 2016)

Promotion Activities in 2016

2. Promotion Booths

- The Big 5 Jeddah, Saudi Arabia (March 2016)
- Project Qatar, Doha - Qatar (May 2016)
- Iran Confair, Tehran – Iran (August 2016)
- Gulf Wood, Manama – Bahrain (October 2016)

3. Country Pavilion

- Dubai WoodShow – MTC Country Pavilion, April - 2016

4. Marketing Mission

- Saudi Arabia (Riyadh) & Jordan (Amman), November – 2016

Thank you