



MASKAYU



GLOBAL RUBBER CONFERENCE 2015

**NEW SECRETARY - GENERAL OF
MPIC**

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Cover : WISDEC has implemented various programmes and training activities related to the wood-based sector. Details on pages 16 - 19.



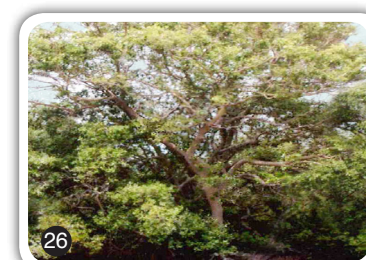
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GLOBAL RUBBER CONFERENCE 2015



*Dr. Jalaluddin Harun, MTIB Director-General
(second from left) with other speakers at the conference.*

The 11th Global Rubber Conference (GRC) was held in Ho Chi Minh City, Viet Nam on 3–5 December. GRC 2015, themed ‘Harnessing Industry Cooperation for a Sustainable Future’ was attended by over 500 experts and delegates from 38 countries. The conference was supported by The International Rubber Research Development Board (IRDB) and the Vietnamese government.

The objectives of GRC were:

- To update the rubber industry on current trends and future challenges
- To facilitate the exchange of ideas and insight into the global rubber industry and the price of rubber products
- To deliver the latest applications from global R&D programmes

The 11th GRC was officiated by H.E. Dr. Ha Cong Tuan, Deputy Minister of Agriculture and Rural Development of Viet Nam. In his welcoming remarks, he noted the importance of GRC as an annual gathering for rubber industry players. However, he added that the rubber industry was expected to continue struggling this year, with profits declining or even reporting losses, owing to the sharp fall in rubber prices in the world market. For the long term, the rubber industry must restructure for sustainable development, and focus on enhancing quality and efficiency to become a great industry.

GRC 2015 also served to highlight updates and key issues in the rubber sector especially on natural rubber latex including recommending policy changes, new strategies and market development. To address these critical issues, the conference emphasised on collaborations between the governments, manufactures and producers to bring a new direction for the industry.

A total of 21 papers related to the rubber industry were presented at the conference. Among the speakers were Dr. Jalaluddin Harun, MTIB Director-General;

Dr. John Baffes, Senior Economist, The World Bank, United States of Amerika; Dr. Stephen V. Evans, Secretary-General, International Rubber Study Group, Singapore; Prof. Jitlada Sakdapipanich, Mahidol University, Thailand; and Prof. Dr. Ho Chee Cheong, Universiti Tunku Abdul Rahman, Malaysia. The event provided a platform for the delegates to engage and explore partnership opportunities with local and global rubber industry players.

As a prelude to the three-day conference, a study tour visited the Rubber Research Institute of Viet Nam and Casumina Tire Plant on 3 December to gain a better understanding of the different applications and technologies used by the local rubber industry players in their cultivation, processing and manufacturing processes. The study tour was also an ideal informal networking session.

MTIB was represented by Dr. Jalaluddin Harun, Director-General and Encik Saiful Bahri Salleh, Deputy Director of Forest Plantation.



Speakers receiving mementos after the papers presentation.



TIMBER WORLD IN BRIEF

ALBANIA

Logging Bans to Save Forest

A ten-year moratorium on logging accompanied by high fines for offenders is expected to go into force in January in Albania, also stopping timber exports. Albania will impose a 10-year moratorium from January 2016 that will ban logging in all forests and the export of timber.

The draft law prepared by the environmental ministry is likely to be approved by parliament in December and will allow only municipality representatives to cut down trees to meet the needs of people who burn wood for winter fuel. After the ban is imposed, all manufacturers using wood to produce goods will be forced to import it.

Balkans.com, 1 December

BRAZIL

Forest Products Contribute to Trade Surplus

Between January and November 2015 Brazil accumulated a USD13.5 billion trade surplus according to the Ministry of Development, Industry and Foreign Trade (MDIC). Over the past eleven months, Brazilian exports reached USD174.4 billion and imports reached USD160.9 billion.

The main products exported were agri-business-related and just 16 products earned the country USD5.6 billion or close to 40% of total export earnings. Forest products were among the 16 top products exported and over the past 11 months, pulp exports reached USD5.1 billion (4.7% more than in 2014).

Exports of paper and paperboard increased to USD1 billion, up 3.4% year on year. Sawnwood exports total USD416 million, (+9.2% year-on-year). The increase in exports was due mainly to the depreciation of the Brazilian Real as competitiveness was improved. Another factor driving up exports was the poor domestic demand which drove manufacturers to actively promote sales overseas.

fordaq.com, 28 December

CHINA

The Largest Importer of Congo Basin Logs

China has become the largest importer of logs from the Congo Basin with some 2.9 million m³ (RWE) being imported in 2014. This amounts to over 75% of total log export from the Congo Basin and exceeds the 2 million m³ imported by member states of the EU. Most of the logs exported from Congo Brazzaville and Equatorial Guinea were destined for China.

China imported 95% of the logs produced from Equatorial

Guinea, 85% of logs from Congo Brazzaville, 78% from the Central African Republic, 76% from the Democratic Republic of the Congo, 64% from Gabon and 63% from Cameroon in 2014.

Dagens Industri, 20 November

Average Import Prices on the Way Down

According to China Customs, in the first three quarters of 2015 China's log imports fell 14% to 34.21 million m³ while sawnwood imports rose slightly (+4%) to 19.9 million m³.

Plywood imports dropped 10% to 117,200 m³, fibreboard imports dropped 7% to 161,600 m³. However, both oriented strand board (OSB) and particleboard imports increased 3% and 6% to 115,700 cubic metres and 333,800 m³ respectively.

Average prices for imported logs, sawnwood, OSB, particleboard and plywood fell 21%, 9%, 20%, 4% and 2% respectively. Average prices for imported fibreboard and wood chips maintained at the same level as during last year.

Globalwood.org, 3 December

CANADA

Wood Product Sales Up And Logs Down

British Columbia forest products exports grew in the first 10 months of the year, compared to sales year-to-date up to October 2014. Statistics Canada reported that solid wood product sales were up 3% and pulp and paper products were up 2.3%. The only major commodity with lower sales was logs, down by 18.8% from last year.

British Columbia saw strong growth in agriculture and food sales, up 21.2%, and fish products, up 15.8% year-to-date to October. Fruits, nuts and whole salmon sales had the strongest gains, while meat and prepared meat were down 9.2%. Low energy and commodity prices continued, with value of natural gas sales down 40.2% and coal down 17.4%.

merrittherald.com, 7 December

CENTRAL/WEST AFRICA Low Prices Attract Buyers to Less Popular Timbers

In West and Central African, for a few low volume 'spot' sales, buyers for China remain out of the market and there is no indication as to when major log buyers for this market will return. In response to the weak demand, West and Central African exporters have maintained solidarity by holding firm on prices and at the same time are trimming back production volumes.

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Prices for Okoume logs have fallen again and producers have come to accept that a recovery in export volumes and FOB prices is unlikely in the medium term. Interest in Beli has waned and prices are under pressure say producers.

The general view is that most buyers seem to be looking for a wider range of the less popular species taking advantage of the lower prices. This is good news for exporters but volumes ordered tend to be small.

fordaq.com, 8 December

EUROPE

Sharp Increase in Sawntimber Imports from Malaysia and Brazil

EU imports of tropical sawntimber increased by 9% to 793,100 m³ in the first nine months of 2015. Imports from Cameroon, the largest supplier, increased 7% to 233,000 m³. Import growth was even more rapid from Malaysia (+22% to 173,800 m³), Brazil (+21% to 99,500 m³), and the Democratic Republic of the Congo (+14% to 21,000 m³).

Imports from Gabon (+1% to 70,400 m³) and Congo (+6% to 38,500 m³) recorded below-average growth rates. Meanwhile, imports from Ghana (-15% to 19,100) and Ivory Coast (-5% to 62,200 m³) have declined this year.

merritherald.com, 7 December

Plywood Production Increased

European plywood manufacturing and consumption rose again in 2014. European plywood output was 12% higher than in 2013 at 2.927 million m³. Consumption edged higher from almost 2.7 million m³ in 2013 to about 2.8 million m³ in 2014. Finnish Raute compiled this market data from a number of sources and published it in a presentation accompanying its third-quarter financials on 30 October. This document updated a compilation published together with documents for its 2014 annual report on 12 February 2015.

All key countries contributed towards this growth in output. According to Raute data, Finnish plywood output climbed 9.0% to 1,188 million m³ last year. Finland was thus responsible for 40.6 % of overall European output. The Baltic region saw an 11.0% leap in production. Spain (19.7%) and Poland (20.0%) posted even larger growth rates. Italy (4.0%) and France (5.6%) boosted their output slightly. The other countries listed separately in the presentation also made more plywood than in 2013.

euwid-wood-products.com, 15 December

GHANA

Export Volume in Third Quarter Lower Than Last Year

The export volume from Ghana developed downhill in the third quarter. According to information from the Ghana Timber Industry Development Division (TIDD), 92,970 m³ of wood and wood products were exported during the period of July to September. Whereas the export volume thus remained 12.5% short of the figure for last year, the corresponding export value developed in the opposite direction and ended up roughly 17% higher than in the same quarter of last year at €46.3 million. The TIDD attributes the reduction in volumes partly to importers' sluggish purchasing activity and partly to production difficulties on location arising from heavy rainfall. The growth in value is due at least in part to markedly higher exports of Teak, which fetches comparatively high prices.

Cumulated over the first nine months, Ghana exported more wood both in terms of volume and value. The TIDD statistics show that the export volume rose by 7% to 267,379 m³. The corresponding product value was roughly 37% higher than the reference figure of a year earlier at €135.0 million.

euwid-wood-products.com, 30 December

GLOBAL

Lumber Markets in Third Quarter 2015

Despite occasional gloomy reports from the sawmilling industry around the world this year, softwood lumber trade increased during the first nine months of 2015 as compared to the same period in 2014. Lumber production in North America has been trending upwards ever since the global financial crisis in 2008 when the lumber market crashed. The biggest production increase during the first eight months of 2015 occurred in Canada.

Lumber prices in the US started to recover in October and November after a 3 ½ year low in the month of September. Finland and Sweden have exported more lumber this year than in 2014. Export prices, in US dollar terms, have fallen dramatically over the past year, making the Nordic lumber producers more competitive in markets trading lumber in US dollars. Lumber import prices to China have fallen during much of 2014 and 2015.

In October, average import prices were 25% lower than their peak in September last year. The biggest price declines have been for lumber imported from Europe. Softwood lumber exports from Russia fell slightly in the Third Quarter 2015 as compared to the previous quarter, which had the highest quarterly lumber shipments ever recorded.

fordaq.com, 4 December

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SHIPPING NEWS



Malaysia: Higher Profit, Revenue Posted by MISC in First Nine Months

MISC of Malaysia registered a revenue of RM7.60 billion (EUR1.61 billion, USD1.77 billion) (up 8.37% year-on-year) during the nine months ended 30 September 2015, while its net profit rose 37.73% to RM1.72 billion from RM1.25 billion. For July-September 2015, MISC reported revenue of RM2.51 billion (up 14.92%) and a net profit of RM483.56 million (up 2.71%).

Source: The SUNDAILY, 5 November

Malaysia: SIRIM Awards ISO Certification to Johor Port

Standards and Industrial Research Institute of Malaysia (SIRIM) awarded the International Organisation Standardisation (ISO) certification for Quality Management System to Johor Port. Johor Port is a wholly-owned subsidiary of MMC Corp, Malaysia's leading utilities and infrastructure group.

Source: New Straits Times, 21 November

Belgium: Some EUR1 Million is Made Available for Inland Shipping of Pallets

The Belgian Minister of Mobility, Mr. Ben Weyts will invest EUR1 million (USD1.07 million) to encourage pallet transport via inland shipping and position inland shipping

as a strong alternative for road transport. Some 80% of companies in Flanders are located within 10 km of a river or canal that is used for inland shipping. Companies can apply for co-funding by submitting their project to the Flemish government between 3 November 2015 and 3 May 2016.

Source: Logistica y Transporte, 7 October

Russia: Government Approves Bill on Regulation of Liner Shipping

The Russian government has approved the bill on state regulation of liner shipping. The document provides for the granting of preferences such as reduced port fees and priority servicing at ports to registered maritime lines. Carriers will need to fulfil certain obligations such as compliance with the schedule of the line and publicly available information on prices and other conditions of work.

Source: Logistic.ru, 9 November

Germany: Association Forecasts Stagnation of Cargo Handling Volume at Seaports

The German association of seaport operators, ZDS estimates that the combined cargo handling volume at seaports will be stable in Germany in 2015 compared to the previous year when 304 million tonnes of goods were handled. The stagnation is mainly due to a weak business

Shipments of Timber and Timber Products through Ports in Peninsular Malaysia, November 2015

Products	Port Klang		Kuantan		Pasir Gudang		Tanjung Pelepas		Penang		Total all Ports m ³	% Change Nov 2015 / Oct 2015
	m ³	% Change Nov 2015 / Oct 2015	m ³	% Change Nov 2015 / Oct 2015	m ³	% Change Nov 2015 / Oct 2015	m ³	% Change Nov 2015 / Oct 2015	m ³	% Change Nov 2015 / Oct 2015		
Sawntimber	46,640	-17	6,061	17	1,420	-26	129	-28	6,009	-22	60,259	-15
MDF	21,118	-28	0	100	7,855	-24	5,199	-20	17,032	86	51,204	-7
Mouldings	10,665	-6	412	55	1,914	-3	331	-32	1,736	71	15,058	0
Plywood	6,514	-5	0	0	13	-46	68	100	6,988	-39	13,583	-26
Veneer	509	-25	0	0	12	-8	0	-100	237	-27	758	-25
Particleboard	30,199	-6	138	-20	236	556	70	438	1,254	509	30,643	-5
TOTAL	115,645	-15	6,611	15	11,450	-20	5,797	-21	33,256	11	172,759	-11

Source : MTIB

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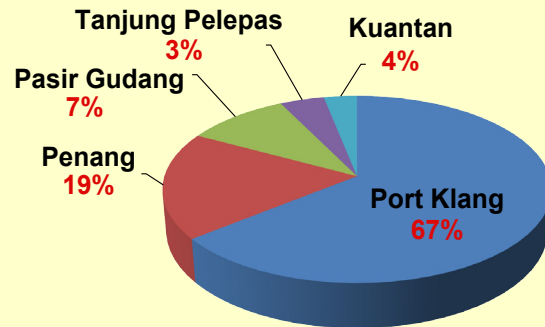
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development in China and Russia, the association pointed out. ZDS believes that German seaports' cargo handling activities will increase by a low single digit percentage in 2016. Furthermore, the organisation has praised the Government's investment plans for improving infrastructure and logistics facilities as well as for boosting the digitalisation process in the industry in Germany.

Source: Süddeutsche Zeitung, 18 November

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Shipments of Timber and Timber Products through Ports in Peninsular Malaysia, November 2015



Total = 172,759 m³



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Total export of Malaysia timber and timber products in November 2015 decreased 13% valued at RM1.86 billion over the previous month. Furthermore, cumulative export for the period of January to November increased 7% valued at RM20.14 billion over the corresponding period.

Sawntimber

Export of sawntimber in November 2015 decreased 9% in volume and 13% in value to 156,019 m³ with a value of RM266.1 million compared to the previous month. In the meanwhile, cumulative export for the first eleven months of 2015 improved 4% in volume and 19% in value to 1.9 million m³ totalled RM2.9 billion over the previous corresponding period.

Export of sawntimber to the EU for the month decreased 40% to 8,266 m³ from 13,689 m³ recorded in the previous month as a result of declining purchases made by the UK, Netherlands, France and Belgium. Export to the UK decreased 56% to 1,024 m³, followed by Netherlands by 46% to 2,964 m³, France by 30% to 1,033 m³ and Belgium by 9% to 1,204 m³. However, export to Germany increased marginally to 1,323 m³ from 1,321 m³ recorded in the previous month.

Total exports to West Asia reduced 48% to 17,400 m³ from 33,210 m³ in the previous month as a result of decreasing purchases made by Qatar, Saudi Arabia, the UAE and Yemen. Export of sawntimber to Qatar declined by 89% to 199 m³ followed by Saudi Arabia by 13% to 963 m³. In addition, export to the UAE and Yemen decreased 41% to 5,374 m³ and 91% to 1,154 m³ respectively. On the other hand, export to Oman and Kuwait increased 41% and 50% to 4,773 m³ and 1,273 m³ respectively.

Buying from ASEAN increased 26% to 65,651 m³ from 52,076 m³ in the previous month. Export to Thailand and the Philippines increased 58% to 37,229 m³ and 14% to 17,685 m³ respectively. However, export to Singapore declined 18% to 9,871 m³ from 12,075 m³ in the previous month.

Shipments to East Asia decreased 13% to 37,013 m³ from 42,565 m³ in the previous month. Export to China reduced 5% to 19,543 m³, followed by Japan by 26% to 4,932 m³ and Taiwan by 30% to 7,108 m³. Similarly, export to South Korea increased 21% to 5,271 m³ from 4,358 m³ in the previous month.

Elsewhere, export to the US increased 6% to 840 m³ from 796 m³ in the previous month. Similarly intake by South Africa and Australia declined 83% to 1,333 m³ and 6% to 1,215 m³ respectively.

The average FOB price of sawntimber decreased 5% to RM1,705 per m³ from RM1,786 per m³ in the previous month. Price of Dark Red Meranti (DRM) increased 2% to RM2,829 per m³ from RM2,777 per m³ in the previous month. Price of DRM to the Netherlands decreased 5% to RM3,387 per m³ from RM3,565 per m³ in the previous month. Keruing was traded at RM1,563 per m³, a decreased of 7% from the previous month.

Plywood

Total export of plywood in November decreased 23% in volume and 25% in value to 186,806 m³ valued at RM358.59 million as compared to the previous month. Similarly, cumulative exports for the period January-November 2015 decreased by 17% in volume and 9% in value to 2,317,124 m³ and RM4.27 billion respectively as compared to the previous corresponding period in 2014.

Total exports to the EU decreased by 54% to 6,533 m³. Similarly, shipments to Belgium, France, Ireland, the Netherlands and the UK decreased by 85%, 29%, 7%, 54% and 55% to 220 m³, 425 m³, 319 m³, 763 m³ and 4,246 m³ respectively whilst Germany and Italy did not make any purchases. However, Denmark increased its intake by 20% to 517 m³.

Exports to ASEAN region decreased as Singapore, Thailand and Philippines imports of plywood decreased by 44%, 31% and 38% to 2,120 m³, 3,806 m³ and 5,010 m³ respectively whilst Indonesia did not make any purchases. However, Brunei increased its intake by 9% to 953 m³. In East Asia, exports to China and Taiwan increased by 8% and 10% to 3,453 m³ and 17,423 m³ respectively. However, Hong Kong, Japan and South Korea reduced their intake by 11%, 13% and 18% to 4,023 m³, 82,731 m³ and 21,403 m³ respectively.

Exports to West Asia decreased by 54% as compared to the previous month. Similarly, shipments to Bahrain, Qatar and Yemen decreased by 70%, 30% and 80% to 170 m³, 131 m³ and 1,738 m³ respectively whilst Kuwait did not make any purchases. On the other hand, Saudi Arabia and UAE increased their intake by 85% and 6% to 971 m³ and 2,541 m³ respectively.

Elsewhere, exports of plywood to South Africa, Mexico, Canada, Australia and New Zealand decreased by 58%, 9%, 5% 48% and 2% to 201 m³, 3,670 m³, 416 m³, 3,057 m³ and 40 m³ respectively whilst Turkey did not make any purchases. However, the US increased its intake by 223% to 20,502 m³.

The FOB price of plywood decreased by 3% to RM1,920 per m³ from RM1,986 per m³ in the previous month.

Veneer

Exports of veneer for November 2015 showed a decrease of 25% in volume and 24% in value to 17,923 m³ at RM29.28 million as compared to the previous month. Exports to Australia, China, Taiwan, India and Viet Nam decreased by 49%, 8%, 49%, 38% and 62% to 134 m³, 500 m³, 7,273 m³, 230 m³ and 70 m³ respectively whilst Italy and Chile did not make any purchases. Meanwhile, Canada, South Korea, Singapore and Philippines increased their intake by 183%, 35%, 51% and 1% to 34 m³, 8,784 m³, 95 m³ and 199 m³ respectively.

The FOB price of veneer increased to RM1,634 per m³ from RM1,629 per m³, an increase of 0.3% from the previous month.

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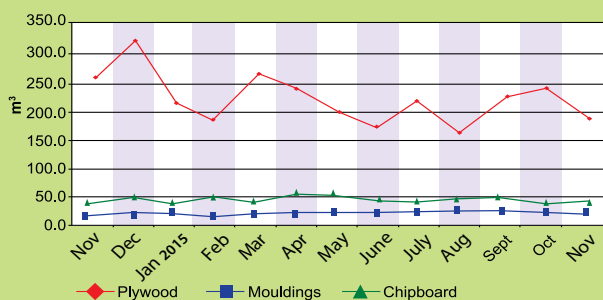
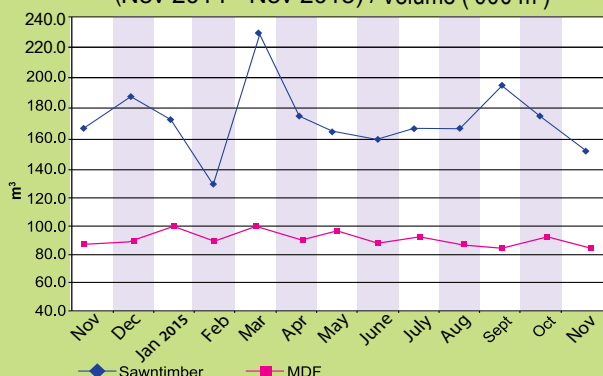
Medium Density Fibreboard (MDF)

Malaysia's exports of MDF for November 2015 showed a decrease of 26% in volume and 27% in value from the previous month. Export totalled 59,323 m³ at RM74.11 million.

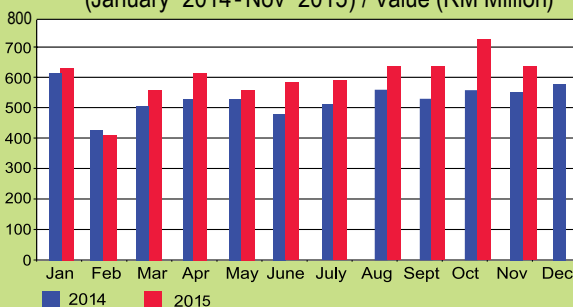
Exports to East Asia registered a decrease of 16% to 10,477 m³ from 12,465 m³ in the previous month. All exports showed negative growth. Export to Taiwan decreased 33% to 662 m³, China including Hong Kong decreased by 29% to 379 m³ and Japan decreased by 12% to 9,436 m³.

Meanwhile exports to West Asia in November 2015 also recorded a negative growth with a decrease of 43% in volume to 21,408 m³ from 37,562 m³ in the previous month. Export to Oman recorded an increase of 110% to 2,785 m³ followed by Bahrain at 42% to 1,069 m³. On the other hand, Lebanon, Jordan, UAE, Iran, Saudi Arabia and Qatar dropped by 94% to 196 m³, 94% to 21 m³, 45% to 8,149 m³, 45% to 1,130 m³, 42% to 2,587 m³ and 38% to 488 m³ respectively from the previous month.

Malaysia : Export of Major Timber Products
(Nov 2014 - Nov 2015) / Volume ('000 m³)



Malaysia: Export of Wooden Furniture
(January 2014 - Nov 2015) / Value (RM Million)



Source : Department of Statistics, Malaysia

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Furthermore, export to South Asia also recorded negative growth by 20% in volume to 7,982 m³ from 9,963 m³. Export to Bangladesh increased by 51% to 1,101 m³ and export to India also increased by 50% to 1,696 m³. Meanwhile, Sri Lanka and Pakistan recorded negative growth decreased by 46% to 910 m³ and 34% to 4,275 m³.

Export to South Africa showed a decrease by 92% to 23 m³ and demand from the US also decreased by 14% to 915 m³ followed by Australia decreased by 4% to 2,420 m³. However, exports to the UK showed a marginal increased by 101% to 281 m³.

In ASEAN, total export to ASEAN region for this month showed decreased by 6% to 13,041 m³ from 13,871 m³ in the previous month. Export to the Philippines and Indonesia increased by 81% to 2,059 m³ and 54% to 3,182 m³. Export to Singapore and Viet Nam down by 58% to 84 m³ and 30% to 7,264 m³ respectively.

Mouldings

Exports of mouldings for the month decreased by 12.4% in volume and 17.4% in value to 18,372 m³ and RM60.6 million respectively. Similarly, cumulative exports for the period of January-November 2015 increased by 2.7% in volume and 15.8% in value to 243,038 m³ and RM759.9 million respectively as compared to the previous corresponding period in 2014.

Exports to the EU for the month recorded at 5,121 m³, decreased of 31.7% compared to the previous month. Shipment to Belgium, Germany, the Netherlands, the UK and Italy decreased by 36.8%, 19.1%, 42%, 33% and 5.6% to 507 m³, 1,092 m³, 2,270 m³, 534 m³ and 17 m³ respectively.

Exports to ASEAN region increased as Indonesia increased its intake by 100% to 19 m³. However, Viet Nam and Singapore reduced its intake by 12.8% and 18.6% to 109 m³ and 1,114 m³ respectively.

Meanwhile, exports to South Korea and China increased by 15.5% and 44.4% to 2,047 m³ and 1,145 m³ respectively. However, Taiwan decreased by 39.5% to 69 m³ compared to the previous month.

Elsewhere, export to Australia and Canada decreased by 10.4% and 40.6% to 2,844 m³ and 41 m³ respectively. However, the USA increased by 40.4% to 2,022 m³ compared to the previous month.

FOB unit value decreased 5.7% from RM3,497 per m³ in the previous month to RM3,297 per m³ in November 2015.

Builders Joinery and Carpentry (BJC)

Total BJC cumulative exports from January to November 2015 increased 8.9% to RM991.9 million as compared to RM910.9 million in the corresponding period last year. Export to the EU increased 10.7% to RM268.7 million. Export to the UK, Denmark, Sweden and Belgium increased by 18.1%, 15.2%, 93.9% and 0.4% to RM148.2 million, RM17.9 million, RM14.9 million and RM48.8 million. Export to France, Germany, Turkey, Italy, Norway and Netherlands decreased by

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Logs

Demand of logs in the domestic market for the month remained subdued while the average domestic prices for most of the species reported to maintain at last month's level.

Log prices for the species of Chengal, Balau and Red Balau were traded at RM4,000 per tonne, RM3,000 per tonne and RM2,500 per tonne respectively. Prices of Keruing stood at RM1,400 per tonne whilst Kempas prices increased slightly by 1.4% to RM1,400 per tonne over the previous month. Meanwhile, Dark Red Meranti, Red Meranti and Nyatoh were continuously traded at RM1,900 per tonne, RM1,800 per tonne and RM900 per tonne respectively. Log prices of Mixed Heavy Hardwood and Mixed Light Hardwood maintained at RM903 per tonne and RM1,200 per tonne respectively.

Sawntimber

The average sawntimber prices in the domestic market continued to be firm for most of the species. However, demand from the foreign markets were still weak due to current unfavourable market condition.

Sawntimber prices of Chengal and Balau remained at RM6,638 per m³ and RM3,178 per m³ respectively. Similarly, prices for Keruing and Mengkulang sawntimber maintained at RM1,766 per m³ and RM1,412 per m³ respectively. On the other hand, prices of Dark Red Meranti and Mersawa dropped by 8.1% and 2.3% to RM2,013 per m³ and RM1,518 per m³ over last month's level. Nyatoh prices, however, stood at RM777 per m³. Sawntimber prices of Mixed Heavy Hardwood and Mixed Light Hardwood continued to be traded at RM573 per m³ and RM1,130 per m³ respectively.

Plywood

The supply of plywood in the domestic market reported to be able to meet the demand of the domestic market. Plywood of 4mm, 6mm, 9mm and 12mm of thicknesses were stably traded at RM14.60, RM22.00, RM34.50 and RM41.50 per piece respectively.

Medium Density Fibreboard (MDF)

Demand for MDF reported to remain low although there were positive demand from the key end-users such as construction and furniture industries in overseas' market. With the average demand received from the domestic market, prices were reported to hover at last month's level. Prices for MDF of 4mm, 6mm, 9mm and 12mm of thicknesses were recorded at RM12.10, RM15.80, RM21.70 and RM28.10 per piece respectively.

Intra-Malaysia Trade - November 2015

Shipments of sawntimber from Sabah to Peninsular Malaysia for the month under review increased significantly by 49% in volume and 22% in value to 451 m³ valued at RM1 million. However, export of plywood reduced by 11% to 8,068 m³ worth at RM15 million as compared to the previous month.

On the other hand, export of sawntimber from Sarawak to Peninsular Malaysia fell by 28% to 363 m³ worth RM0.38 million over last month's level. Conversely, shipment of plywood increased by 5% to 9,729 m³ worth at RM13.2 million. Export of veneer, however, declined by 8% to 6,793 m³ valued at RM96.3 million.

No intra trade from Peninsular Malaysia to Sabah and Sarawak was recorded in November 2015.

INTRA-MALAYSIA TRADE – NOVEMBER 2015

From	Products	OCTOBER 2015		NOVEMBER 2015		% Change in Volume Nov 2015 / Oct 2015	% Change in Value Nov 2015 / Oct 2015
		Volume (m ³)	Value (RM '000)	Volume (m ³)	Value (RM '000)		
SABAH	Logs	0	0	0	0	0	0
	Sawntimber	303	836	451	1023	49	22
	Plywood	9,091	18,152	8,068	15,051	-11	-17
	Veneer	0	0	0	0	0	0
SARAWAK	Logs	0	0	0	0	0	0
	Sawntimber	507	590	363	375	-28	-36
	Plywood	9,292	12,937	9,729	13,213	5	2
	Veneer	7,344	10,839	6,793	96,301	-8	788

Source : Department of Statistics, Malaysia

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***AVERAGE DOMESTIC PRICES OF LOGS, SAWNTIMBER, PLYWOOD AND MDF IN PENINSULAR MALAYSIA
NOVEMBER 2015 (VALUE IN RM)**

SPECIES	LOGS/tonne	SAWNTIMBER/m ³			
	18" UP	GMS	STRIPS	SCANTLINGS	
HEAVY HARDWOOD					
Chengal	4,000	6,638	7,062	8,828	
Balau	3,000	3,178	2,331	3,530	
Red Balau	2,500	2,966	3,037	3,178	
Merbau	2,650	3,778	2,684	2,754	
Mixed Heavy Hardwood	903	573	777	812	
MEDIUM HARDWOOD					
Keruing	1,400	1,766	1,342	2,203	
Kempas	1,400	1,977	1,398	2,010	
Kapur	1,700	1,800	1,603	2,331	
Mengkulang	1,100	1,412	1,448	1,575	
Tualang	1,340	2,436	1,723	1,730	
LIGHT HARDWOOD					
Dark Red Meranti	1,900	2,013	2,260	2,825	
Red Meranti	1,800	1,871	1,893	1,907	
Yellow Meranti	1,150	1,436	1,024	1,059	
White Meranti	1,040	2,119	2,189	2,260	
Mersawa	1,620	1,518	1,624	1,660	
Nyato	900	777	847	1,201	
Sepetir	850	1,107	1,448	1,469	
Jelutong	1,030	1,589	1,123	1,130	
Mixed Light Hardwood	1,200	1,130	1,201	1,236	
MALAYSIAN RUBBERWOOD					
<i>Hevea brasiliensis</i>	LOGS/tonne 140	SAWNTIMBER/m ³			
		1" X 1"	2" X 2"	3" X 3"	4" X 4"
		706	1,045	1,081	1,186
PLYWOOD 4' X 8'					
(RM per piece)	4mm	6mm	9mm	12mm	
	14.60	22.00	34.50	41.50	
MDF 4' X 8'					
(RM per piece)	4mm	6mm	9mm	12mm	
	12.10	15.80	21.70	28.10	

Note: Log prices ex-batau. Sawntimber, plywood, MDF and Malaysian Rubberwood (*Hevea brasiliensis*) prices ex-mill
* Prices are only indicative

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TIMBER ROUND-UP

9.7%, 16.7%, 23.1%, 35.4%, 59.1% and 79% to RM17.3 million, RM7.63 million, RM2.57 million, RM2.92 million, RM211 thousand and RM331 thousand respectively.

In Asia, exports to Japan, Taiwan, Saudi Arabia, the UAE, South Korea and Bahrain decreased 4.3%, 2.7%, 35.8%, 63.4%, 6.8% and 44.9% valued at RM67.8 million, RM17.1 million, RM6.0 million, RM3.9 million, RM2.97 million and RM1.9 million respectively. However, exports to Singapore, India, Pakistan, Thailand, Viet Nam and Qatar grew 7.2%, 3.7%, 29.1%, 9%, 27.5% and 31% to RM 118 million, RM59.6 million, RM38.5 million, RM32.4 million, RM30.0 million and RM7.2 million respectively.

Exports to Australia, South Africa and Maldives increased by 20.3%, 71.6% and 173.1% to RM148.2 million, RM19.6 million and RM15.1 million respectively. Likewise, the US increased its intake by 12.2% to RM86.5 million from RM77.1 million in the previous corresponding period.

Furniture

Malaysia's total exports of wooden and rattan furniture between January to November 2015 improved by 14% to RM6.61 billion compared to RM5.82 billion recorded in the previous corresponding period of last year.

Exports of wooden furniture from Malaysia increased by 14% from RM5.79 billion to RM6.59 billion compared to the same period in 2014. Demand for wooden furniture for November 2015 was positive across most major markets.

Economic recovery in the US has helped furniture exports

continued to increase by 26% to RM2.25 billion from RM1.79 billion recorded in the previous corresponding period. Japan's demand also increased by 12% from RM518.53 million to RM579.80 million due to better demand of housing starts in Japan.

Shipments to Australia grew by 22% to RM484.81 million from RM399.0 million in 2014 while exports to UK increased by 16% to RM335.85 million. Similarly, demand from Singapore increased by 11% to RM357.78 million. Imports by Canada increased by 13% from RM242.82 million in 2014 to RM275.45 million. However, imports by Russia dropped by 26% from RM20.15 million to RM14.96 million. Germany, Spain and Norway also reduced their consumption by 14%, 16%, and 26% to RM69.58 million, RM19.57 million and RM14.96 million respectively.

In West Asia, imports by the UAE recorded a slight increase of 4% to reach RM204.02 million. Exports to Saudi Arabia increased by 42% to RM189.60 million. India also improved its consumption by 9% to reach RM138.19 million. However, exports to Bahrain declined by 11% to RM16.90 million. In the East Asia market, exports to South Korea improved by 10% with a purchase of RM114.18 million from RM104.06 million in 2014. Similarly, imports by the Philippines recorded an increase of 19% to RM112.71 million.

Meanwhile, exports of rattan furniture declined by 22% to RM27.77 million. Demand by Singapore fell by 26% to RM6.12 million. Shipments to India and Thailand decreased by 59% to RM3.02 million and 23% to RM1.28 million respectively. Similarly, export to the US continued to decrease by 20% to RM1.71 million. However, exports to the UK and Australia increased by 22% to RM2.62 million and 17% to RM1.97 million respectively.

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INDONESIA

Wood Exporters Say 'No' to Relaxing SVLK Requirements

Wood product exporters in Indonesia have voiced concern over the decision of the Ministry of trade to allow export of a range of downstream wood products without Timber Legality Verification System (SVLK) certification. This, say exporters, will undermine the advances made in overseas markets, Jakarta Post reported. The latest information from the Ministry of Environment and Forestry shows that wood product exports to the end of October were worth over USD10 billion well up on the USD6 billion for the whole of 2014.

Director-General of Sustainable Production and Forest Management said, the increase in exports was due as much to the implementation of reforms in the forestry sector as to an improved global economy. However, he did acknowledge that the SVLK issue is of concern to SMEs in the timber sector. Many manufacturers and exporters say any relaxation of the requirements for SVLK certification will undermine their marketing efforts and set back Indonesian wood product export growth.

The Indonesian Ministry of Trade recently revised Regulation No. 97/2014 on industrial forest products which requires all timber exporters to obtain SVLK certification and issued Regulation No. 89/2015 as a deregulation measure. The head of the EU office in Jakarta, has expressed dismay at the rolling back of the SVLK regulation and has requested the government to stick to the agreement reached on the VPA.

fordaq.com, 9 December

INDIA

Join Global Alliance to Curb Smuggling of Endangered Timber

Enthused by the success of the Directorate of Revenue Intelligence's (DRI) efforts in busting organised syndicates of Red Sanders smugglers with the help of other nations, the World Customs Organisation (WCO) has urged India to form alliances with several nations in curbing the illegal trade of other precious wood. Early during the year in April, the DRI had launched 'Operation Sesha' (derived from Seshachalam forest in Andhra Pradesh) by roping in 17 countries including Malaysia, Hong Kong, Korea, Japan, China, Nepal, Myanmar, Viet Nam, Maldives, Pakistan and the Philippines, among others, under which it seized red sanders worth 451 metric tonnes during the April-May period.

The operation was a huge success as the seizure of smuggled Red Sanders in those two months was much more than the 379 metric tonnes made during the entire 2014-15. The WCO has noticed this and asked to form a bigger alliance with nations across the Middle East, Africa, and Southeast Asia to curb illegal smuggling of other endangered timber. Red Sander has high demand in China, Hong Kong and Japan where it is considered a luxury item. DRI seized red sanders worth 324 metric tonnes in 2013-14. According to the DRI, the seizure was only 10% of the actual wood being smuggled.

The official said that the precious woods included Ebony of Indonesia, Sandalwood from Sri Lanka, Madagascar Rosewood, Agarwood, Red Sanders, Beach Slab Wood, Siam Rosewood, Burmese Rosewood, and Diyar Wood from Pakistan. All Regional Intelligence Liaison Offices (RILO) across these nations have already started drafting the strategy to initiate the operation to protect these endangered plant species under the Convention on International Trade in Endangered Species (CITES) of Wild Fauna and Flora, an international agreement between governments. While there are three RILOs in Africa, there is one each in Middle East and South East Asia. CITES regulates international trade in over 35,000 species of plants and animals, including their products and derivatives, in order to ensure their survival in the wild with benefits for the livelihood of local people and the global environment.

indianexpress.com, 8 December

LATVIA

Plywood Exports Continue to Increase

Latvian exports of plywood in the third quarter of 2015 showed year-on-year growth of roughly 23%. The improvement already seen in the second quarter, when exports were up by roughly 14%, has therefore continued. Prior to that, Latvian plywood exports had plunged in the first quarter by roughly 25% year on year. According to data from the forestry department of the Latvian Ministry of Agriculture, Latvia's plywood exports from January to September 2015 increased year on year by 3.9% to 196,200 m³. In terms of individual buying countries, growth in exports was highest to Great Britain, at 56.2% to 28,100 m³. Plywood exports to Turkey, at 13,700 m³, were 15.6% higher year on year, while exports to Germany, the most important buyer country, almost stagnated, at 36,600 m³. Declines were shown for the Netherlands, with a minus of 19.4% to 13,800 m³, and for France, at minus 3.0% to 10,500 m³. Deliveries to other buying countries fell by 1.0% to 93,600 m³.

euwid-wood-products.com, 16 December

SOUTH KOREA

Anti-Dumping Duties on Chinese Plywood Suggested

The Korea Trade Commission (KTC) is suggesting anti-dumping duties on plywood made with needleleaf trees imported from China. The commission launched an investigation after receiving a complaint from the Korea Wood Panel Association on 30 January 2015 and discovered that the market had been distorted by unfair price cutting practices. Accordingly, the KTC had submitted a four-year punitive tariff rate recommendation of 4.22% to 7.15% to the finance ministry. The government previously imposed anti-dumping duties on plywood made from broadleaf trees in October 2013, leading China-based businesses to switch to needleleaf trees.

Korea Herald, 22 December

NEW SECRETARY - GENERAL OF MPIC



*Datuk Dr. Sundaran Annamalai,
Secretary-General of MPIC.*

Datuk Dr. Sundaran Annamalai has been appointed as the new Secretary-General of Ministry of Plantation Industries and Commodities (MPIC). He succeeds Datuk Himmat Singh effective 16 December 2015.

Before assuming his current post, he was Deputy Secretary-General (Policy), Ministry of Finance. Prior to that, he held the position of Director at the National Strategy Unit, Ministry of Finance. Prior to the Ministry of Finance, Datuk Dr. Sundaran served as Executive Director at the Board of the World Bank Group, and represented the Constituency of Brunei Darussalam,

Fiji, Indonesia, Lao PDR, Malaysia, Myanmar, Nepal, Singapore, Thailand, Tonga and Viet Nam. He is a member of the Audit Committee and Ethic Committee of the World Bank Board.

Datuk Dr. Sundaran obtained his Doctorate degree from the International Christian University in Tokyo, Japan; his MBA (Finance) from the Michigan State University, Michigan, USA; Bachelor of Laws (LLB), University of London, UK; Bachelor of Science (Maths/Physics), Universiti Sains Malaysia; Diploma in Public Management, INTAN, Malaysia; and Certificate in Legal Practice, Kuala Lumpur, Malaysia.

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Malaysian Timber Industry Board
(Ministry of Plantation Industries and Commodities)

Level 13-17, Menara PGRM No.8, Jalan Pudu Ulu, Cheras P.O. BOX 10887, 50728 KUALA LUMPUR
Tel : 603 - 9282 2235 , Fax : 603 - 9285 1477 / 9200 3769, E-mail : info@mtib.gov.my, Website : www.mtib.gov.my

MTIB TRAINING PROGRAMME 2016

MTIB will conduct the following courses in 2016 at the Wood Industry Skills Development Centre (WISDEC) in Banting, Selangor and Kota Kinabalu, Sabah. These courses are designed to assist in expediting technology transfer and to impart skills and knowledge to the wood-based industry in particular the downstream wood processing sectors. Besides these, MTIB offers customised courses according to the specific needs of the companies or agencies, upon request.

VENUE : WISDEC SELANGOR

	No	Code	Course Title	Fee	Date
FEB	1	WR 302	Identification of Malaysia Timber Species	RM 742.00	22-25 Feb
MARCH	2	WR 305	Identification of Commercial Import Wood Species	RM 742.00	7-10 March
	3	WM 411	Product Costing	RM 371.00	22-23 March
APRIL	4	WT 403	Technology and Operation of Woodworking Machine - CNC	RM 742.00	11-14 April
	5	WT 409	Operation and Maintenance of Woodworking Machines	RM 556.50	26-28 April
MAY	6	WD 407	Application of CAD in Furniture Design (Basic)	RM 742.00	9-12 May
	7	WD 409	Application of CAD in Furniture Design (Advanced)	RM 742.00	23-26 May
JULY	8	WF 404	Creative Finishing	RM 742.00	25-28 July
AUGUST	9	WC 409	Furniture Making (Sofa)	RM 742.00	8-11 Aug
	10	WC 408	Furniture Making (Garden Furniture)	RM 742.00	22-25 Aug
SEPT	11	WC 405	Furniture Making (Kitchen Cabinet)	RM 742.00	19-22 Sept
OCT	12	WF 401	Furniture Finishing	RM 742.00	3-6 Oct
	13	WC 410	Knock Down Furniture	RM 742.00	17-20 Oct
	14	WE 403	Creative and Innovation Marketing	RM 742.00	7-10 Oct
NOV	15	WC 403	Jigs and Fixtures Making	RM 742.00	21-24 Nov

For WISDEC Selangor, please contact:

Puan Rohaiza Abdul Kadir Zailani/
 Encik Mohd Shairazi Yahya
 Wood Industry Skills Development Centre
 Lot 167, Jalan 3,
 Kompleks Perabot Olak Lempit,
 42700 Banting, Selangor

Tel : 603-3149 2924
 Fax : 603-3149 2122
 E-mail : wisdec@mtib.gov.my

VENUE :WISDEC SABAH

	No	Code	Course Title	Fee	Date
JAN	1	WP 301	Timber Drying (CoC)	RM 1,969.00	18 Jan- 1 Feb
FEB	2	WM 406	Safety and Health in the Wood-based Industry	RM 265.00	27-28 Feb
MARCH	3	WT 402	Machining Technology and Operation of Wood Working Machines	RM 397.00	12-14 March
APR	4	WC 401	Basic Furniture Making	RM 530.00	23-26 Apr
MAY	5	WC 405	Furniture Making (Kitchen Cabinet)	RM 530.00	14-17 May
AUGUST	6	WS 308	Acacia Timber Processing	RM 397.50	30 Jul - 1 Aug
	7	WC 408	Furniture Making (Garden Furniture)	RM 530.00	20-23 Aug

For WISDEC Sabah, please contact:

Encik Mohd Hilmi Shamsuri
Wood Industry Skills Development Centre
Lot 4, Fasa 1, Jalan Timur 6,
Taman Perindustrian Kota Kinabalu (KKIP),
Peti Surat 177, Pos Mini Indah Permai,
88450 Kota Kinabalu, Sabah

Tel : 6088-498 822
Fax : 6088-498 811/498 833
E-mail : mtibsabah@mtib.gov.my



Hands - on session.

MTIB YOUTH TRAINING PROGRAMME RELATED TO THE TIMBER INDUSTRY



Trainees undergoing practical training programme at the WISDEC workshop.

WISDEC TRAINING PROGRAMME

Human capital development is a very important agenda in the development of the country's timber industry in Malaysia. Skilled workers will increase productivity, efficiency and quality while producing value-added products. This will consequently improve the competitiveness of the national timber industry in the global market.

To implement its role more effectively, MTIB has established Wood Industry Skills Development Centre (WISDEC). WISDEC has implemented various programmes and training activities related to the wood-based sector. From the time it was established, WISDEC has conducted many short course training programmes. The target groups are workers of all levels, ranging from operational, supervisory to management. The programmes were in the form of short courses, seminars, workshops, internships and study tours as shown in **Figure 1**. The youth training programme was implemented in 2001.

YOUTH TRAINING PROGRAMME

The youth training programme is a long-term training programme. It aims to train local youths in skills necessary for employment in the timber industry. Youths who complete the programme are awarded certificates of competency. The details of the programmes are as seen in **Table 1**.

Professional Management Development (PMD)

- Professional Management Development (PMD) is a structured training programme which provides an excellent career opportunity to young executives and fresh graduates, who are interested to pursue a career in the wood-based industry.

Furniture Design Making (FDM)

- Furniture Design Making (FDM) focuses on innovating and pushing the boundaries of design and utilisation of materials. The course also encourages students to develop a professional approach to design and manufacturing while nurturing their own distinctive styles of furniture.

Wood-based Industry Apprenticeship Scheme (WIAS)

- The Wood-based Industry Apprenticeship Scheme (WIAS) is a structured training programme which provides an excellent career opportunity to school leavers and workers who are interested in pursuing a career in the wood-based industry.

Timber Processing and Finishing Technology (TPF)

- Timber Processing and Finishing Technology (TPF) provides an avenue for youths to enhance skills and knowledge in the wood-based industry. The intensive hands-on training provides a structured timber manufacturing and processing skills programme that will produce a competent, effective and skilled workforce to support the nation's growing wood-based industry.

National Dual Training System (SLDN)

- National Dual Training System (SLDN) is a training conducted in two learning situations, the real working environment and the training institute. It is operated through joint ventures with companies and training institutions.

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Figure 1 : Short Term, Youth Training and Other Programmes.

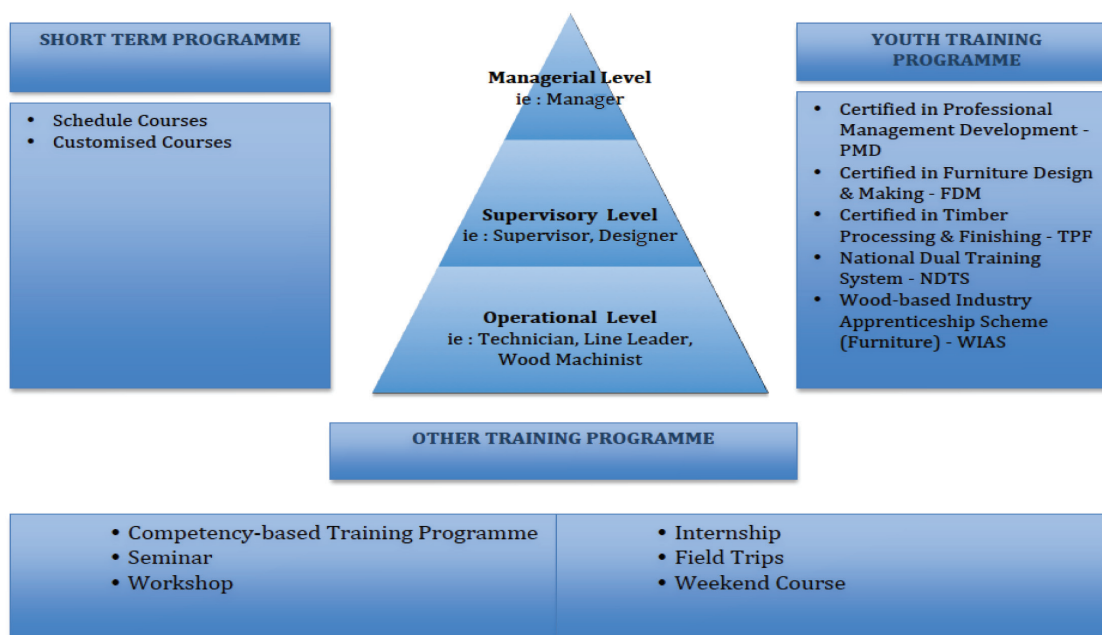


Table 1 : Youth Training Programme

No		Professional Management Development	Furniture Design and Making	Timber Processing and Finishing	Wood-based Industry Apprenticeship Scheme (Furniture)	National Dual Training System
1	Objectives	• To provide opportunity to executives and fresh graduates to further their industry knowledge and skills as well as contribute to the timber industry • To provide supervisory and managerial skills to manage in the competitive timber industry • To create higher employability value in the timber industry • To enhance career growth for young executives	• To provide graduates with skills for higher employability in the wood-based industry • To provide industry knowledge and skills through hands-on training • To create a pool of designers for the timber industry	• To provide opportunities for SPM holders to be part of a growing industry • To enhance knowledge and skills • To meet the demand for skilled workers in the timber industry • To provide a means for employees in the wood-based industry to enhance skills and advance careers	• To provide a structured multi-skill training in the industry for PMR and SPM school leavers before joining the industry • To meet the increasing demand for skilled workers in the wood-based industry (furniture) within a robust economy • To provide trainees with a recognised qualification which can be used for further retraining and skills upgrading for career progression within the industry	• To assist companies to get employees • To assist companies in identifying and select potential skilled workers and increase productivity • To Increase the number of skilled workers in the timber industry in line with the government's aspiration
2	Course Duration	Five months	Two months	Nine months	Eight months	15 months
3	Entry Requirement	• Diploma or Degree in any field • Age 18-25	• Diploma or Degree in design and architecture • Age 18-25 • Strong interest in design	• Pass in PMR, SPM, SPMV • Age 18-30	• Pass in PMR, SPM, SPMV • Age 18-30	• Pass in PMR, SPM, SPMV • Age 18-30
4	Certificate	IMPAC Certificate awarded by MPIC	IMPAC Certificate — awarded by MPIC	IMPAC Certificate — awarded by MPIC	• Malaysian Skill Certificate (SKM) - Cabinet Making (Level 3) - JPK/KSM • IMPAC Certificate — awarded by MPIC	• Malaysian Skill Certificate (SKM) - Cabinet Making (Level 3) • IMPAC Certificate — awarded by MPIC

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Certificate-awarding ceremony.

Besides its own youth training programme, WISDEC is also involved in several other programmes that involve youths:

Vocational College

MTIB and Ministry of Education have collaborated to conduct the Furniture Processing Technology programme at WISDEC. Twenty-five students enrolled on 26 January 2015 at WISDEC Sabah to attend the Certificate of Proficiency Level 2 and 3 programmes for two years.

Skills Competition

MTIB through WISDEC has been involved in Skills Competitions since 10 years ago. Initially, WISDEC acted as venue for the furniture making and wood joinery categories in the Malaysia Skills Competition. Now WISDEC's involvement has expanded to beyond being a competition venue; it has been appointed by the Department of Skills Development (DSD) as a preparatory exercise venue for participants of international skills competitions such as the ASEAN Skills Competition (ASC) and the World Skills Competition (WSC). DSD has also appointed two WISDEC officers as industry experts in furniture and joinery to train Malaysian contestants.

WorldSkills Competition Malaysia Youth Category (WSMB)

Formerly known as Malaysia Skills Competition (PKM), this is a skills competition held annually by the DSD and Ministry of Works Malaysia, in collaboration with agencies such as MTIB. WSMB aims to select and recognise coaches and skilled workers who have superior skills. The competition is conducted in two stages, namely the pre-qualification and final. The timber sector is contested in the cabinet making and joinery categories.

ASEAN Skills Competition (ASC)

The ASEAN Skills Competition (ASC) was established in 1995. Malaysia was host of its inaugural event. The competition is organised every two years in rotation of ASEAN countries. It is a platform for youths to compete and gain recognition, and the opportunity to display their talents at ASEAN level. Similar to WSMB, the two timber trades being competed are Joinery and Cabinet Making.

World Skills Competition (WSC)

World Skills Competition (WSC) is an international competition in which youths from all over the world compete to find the best players in their respective fields. It is formerly known as Skills Olympics. The bi-annual competition was first held in Spain in 1946. Malaysia joined the World Skills Competition in 1993, namely WSC 32. Today, World Skills Competition boasts the participation of over 50 countries, and holds 45 games, testing various skills. In the timber sector, the three trades or fields are Cabinet Making, Carpentry and Joinery. In addition to WSC, there are also world skills competitions at regional levels such as WorldSkills Oceania (Australia, New Zealand and the Pacific Islands).

MALAYSIA ACHIEVEMENTS AT INTERNATIONAL SKILLS COMPETITIONS IN CABINET MAKING AND JOINERY IN 2014 AND 2015

No	Field	Year	Competition	Achievement
1	Cabinet Making	2014	ASEAN Skills Competition (ASC) 2014, Hanoi	Silver Medal
		2015	Worldskills Oceania 2015 Hamilton, New Zealand	Gold Medal
			WorldSkills Competition (WSC) 2015, São Paulo, Brazil	Medallion for Excellence
2	Joinery	2014	ASEAN Skills Competition (ASC) 2014, Hanoi	Medallion for Excellence
		2015	Worldskills Oceania 2015 Hamilton, New Zealand	Gold Medal
			WorldSkills Competition (WSC) 2015, São Paulo, Brazil	Medallion for Excellence

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Classroom session on theory delivered by experienced instructor.



Trainees hard at work in the workshop.

ASEAN Skills Competition (ASC) 2014, Hanoi

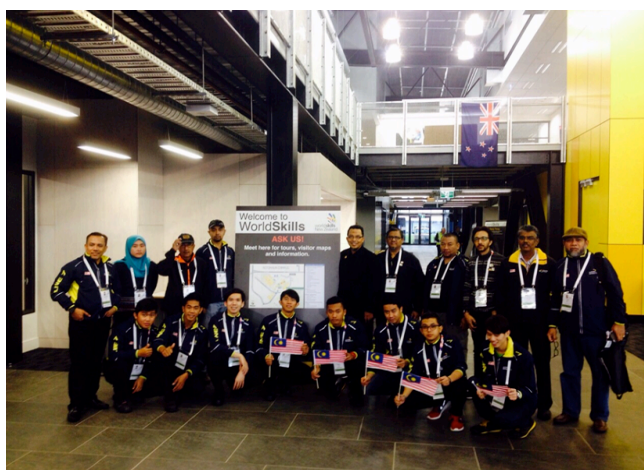


Participants and experts from ASEAN in Joinery.



Malaysian participants and experts in Joinery and Cabinet Making with their medals.

Worldskills Oceania 2015, Hamilton, New Zealand

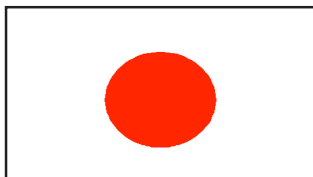


Malaysian contingent at the Oceania Worldskills 2015 in Hamilton, New Zealand.

WorldSkills Competition (WSC) 2015, São Paulo, Brazil



MTIB contingent to WSC 2015 São Paulo, Brazil, led by Dr. Jalaluddin Harun, Director- General of MTIB.



JAPAN CONTINUES TO EXPAND LOCAL WOOD CONSUMPTION

Introduction

Japan, a country of islands, extends along the eastern or Pacific coast of Asia. The four main islands, running from north to south, are Hokkaido, Honshu (or the mainland), Shikoku, and Kyushu. Okinawa Island is about 380 miles southwest of Kyushu. About 3,000 smaller islands are included in the archipelago. In total land area, Japan is slightly smaller than California. About 73% of the country is mountainous, with a chain running through each of the main islands. Japan's highest mountain is the world-famous Mount Fuji (12,388 feet). Since so little flat area exists, many hills and mountainsides are cultivated all the way to the summits.

As Japan is situated in a volcanic zone along the Pacific depth, frequent low-intensity earth tremors and occasional volcanic activity are felt throughout the islands. Japan has total area of 377,915 km² and total population 127 million.

Even though Japan has a land area of 377,915 km², 69% of its land is forested and unsuitable for agricultural, industrial or residential uses. With only about 12% of its land being arable, Japan imports about 60% of grain and fodder crops from other countries and relies on the imports of commodities such as fuels, foodstuffs, chemical, textiles and raw materials from various countries for its industrial sectors.

Japan's industrialised, free-market economy is the third-largest in the world. Its economy is highly efficient and competitive in areas linked to international trade, but productivity is far lower in protected areas such as agriculture, distribution, and services. Japan's reservoir of industrial leadership and technicians, well-educated and industrious work force, high savings and investment rates, and intensive promotion of industrial development and foreign trade produced a mature industrial economy.

Japan has few natural resources, and trade helps it earn the foreign exchange needed to purchase raw materials for its economy. In 2014, Japan's GDP real growth rate was at negative 0.1%. The services sector contributed 72%, industry 26.8% and agriculture 1.2% to the GDP. GDP per capita was at USD37,500.

Forest Resources

Japan's 10 million hectares of planted forests, mainly planted in the 1950-60's, have reached the maturing stage. The planted forests are now shifting from "resource development stage" to "resource use stage". Given such resource condition, large-scale sawmills and plywood mills are shifting their procurement from imported logs to domestic logs, in response to the uncertainty of the international market, caused by the growing demand of wood in emerging economies such as China and India, as well as the drastic increase of export tax on logs in Russia. Under such circumstances, the forestry sector is



now strongly expected to supply raw materials from planted forests to wood mills sustainably, contributing to the mitigation of global warming and creating jobs in the mountainous areas.

Forest ownership in Japan is characterised by a large number of small, fragmented, and scattered forest owners; almost 90% of forest owners own less than 10 hectares of forests. These forest owners tend to be reluctant in forestry practices due to low profitability. The mountainous areas cover 60% of total forest area, or 50% of total land area in Japan.

Total demand of wood including wood chip for biomass fuel, wood for charcoal, wood for export is 75,814,000 m³ for which domestic production is 23,662,000 m³ so the degree of self-sufficiency is 31.2%. This is the first time that the degree recovered over 30% in 26 years since 1988. Japan's wood self-sufficiency rate dropped to a record low of 18.15% in 2000 from 94.51% in 1955. This was due to falling prices and rising costs of domestic production and rising imports. However, this rate has been moderately improving in recent years.

Japan's Forestry Agency has set a target of lifting the self-sufficiency rate to 50% by 2020 to ensure a stable supply, according to a report by Japan Times. The agency has also planned other ways to promote and boost domestic wood production: construction of multi-storey buildings using Japanese cross-laminated timber; and support for wooden biomass power generation as a new source of revenue for mountainous villages.

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Malaysia's Timber Trade with Japan

Japan is Malaysia's largest market for timber and timber products particularly for plywood and other value-added timber products such as furniture and MDF. In 2010, total timber exports were RM3.8 billion. In 2011, export to Japan increased by 22% to RM4.6 billion. This was due to the gradual economic recovery of Japan after the Tsunami and earthquake incidents resulting in an increase in infrastructure spending and housing starts. In 2012-2014, the export were hovering around RM4.2 billion.

Japan currently ranked as Malaysia's largest market for timber and timber products. Major timber and timber products export to Japan are plywood (64%), furniture (14%), logs (4%) and sawntimber (4%).

Plywood is the main export to Japan. Malaysia has overtaken Indonesia as the largest supplier of plywood to Japan. In 2014, exports were at RM2.62 billion and in 2014, increased by 1% to RM2.65 billion. Wooden furniture exports to Japan registered at RM571.36 million in 2013 and increased by 0.1% to RM572.29 million in 2014. Exports of logs on the other hand, registered at RM164.46 million 2013, however, exports decreased by 2% to RM160.51 million in 2014.

Malaysia's Import of Timber Products from Japan

Malaysia's import of timber products from Japan showed a fluctuating trend. Total import in 2010 amounted to RM11.1 million and in 2011, imports increased to RM22.8 million. Imports rose to RM43.4 million in 2012. However, in 2013 it dropped to RM35.8 million and fell to RM17.4 million in 2014. Major products imported by Malaysia in 2014 were furniture totaling RM3.6 million, followed by logs at RM1.4 million.

Japan's Import of Timber and Timber Products

Import of timber and timber products by Japan has been substantial due to its high consumption. In 2010, imports recorded at USD10.5 billion. In 2011, imports increased to USD12.6 billion. In 2012, total import fell 6% to USD12 billion. Imports, however, increased to USD12.5 billion in the following year. In 2014, it dropped marginally by 6% to USD11.7 billion.

Malaysia: Export of Timber and Timber Products to Japan by Value

(Value : RM'000)

Product	2010	2011	2012	2013	2014
Logs	212,097	229,295	133,680	164,458	160,512
Sawntimber	150,292	161,874	177,928	144,029	151,074
Plywood	2,159,743	2,704,383	2,541,645	2,618,897	2,651,387
Veneer	30,766	36,565	35,046	26,131	34,387
Mouldings	91,033	110,058	100,670	87,100	90,696
Particleboard	14,115	22,072	26,996	20,755	20,589
Fibreboard	232,057	256,083	274,741	247,154	211,099
Wooden Frame	4,615	19,922	4,438	6,138	4,161
BJC	84,374	111,004	113,636	95,264	85,195
Wooden Furniture	607,507	775,098	693,770	571,360	572,288
Rattan Furniture	16	366	257	296	448
Other Products	177,399	174,590	163,583	201,616	182,058
TOTAL	3,764,015	4,601,311	4,266,391	4,183,196	4,163,894

Source: MTIB and Department of Statistics Malaysia (DOSM)

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Malaysia: Export of Timber and Timber Products to Japan by Volume

(Volume: m³)

Product	2010	2011	2012	2013	2014
Logs	435,672	360,495	207,197	248,408	235,785
Sawntimber	84,250	86,810	105,100	78,865	74,610
Plywood	1,437,070	1,496,873	1,608,922	1,623,578	1,495,190
Veneer	17,748	18,977	16,605	12,996	15,189
Mouldings	35,757	41,773	36,257	29,236	32,111
Particleboard	13,510	23,368	27,454	21,911	19,310
Fibreboard	152,645	152,282	161,964	165,710	140,863
TOTAL	2,176,652	2,180,578	2,163,499	2,180,704	2,013,058

Source: MTIB and DOSM

Malaysia: Import of Timber and Timber Products from Japan by Value

(Value : RM'000)

Product	2010	2011	2012	2013	2014
Logs	1,168	1,849	1,259	1,451	1,413
Sawntimber	865	503	100	161	303
Plywood	250	169	438	200	215
Veneer	-	133	264	-	6
Mouldings	23	168	5	71	14
Chipboard/Particleboard	29	73	16	94	98
Fibreboard	330	287	409	503	356
Wooden Frame	11	33	10	-	-
BJC	104	135	13,052	76	220
Wooden Furniture	1,229	1,950	1,903	1,440	3,617
Rattan Furniture	355	290	222	190	113
Other Products	6,715	17,165	25,734	31,620	11,046
TOTAL	11,079	22,754	43,413	35,806	17,401

Source: MTIB and DOSM

Malaysia: Import of Timber and Timber Products from Japan by Volume

(Volume: m³)

Product	2010	2011	2012	2013	2014
Logs	313	519	317	391	381
Sawntimber	402	241	45	78	117
Plywood	689	238	337	108	91
Veneer	-	36	44	-	2
Mouldings	41	187	2	25	14
Chipboard/Particleboard	33	56	18	94	77
Fibreboard	383	402	436	569	390
TOTAL	1,861	1,679	1,199	1,265	1,072

Source: MTIB and DOSM

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Japan: Import of Timber and Timber Products (HS Code 44)

(Value : USD'000)

Product	2010	2011	2012	2013	2014
Fuel wood	2,523,610	2,682,468	2,542,364	2,257,214	2,280,144
Wood Charcoal	112,293	124,249	130,669	129,569	133,193
Logs	1,005,514	1,111,886	1,030,051	1,105,013	1,045,857
Hoopwood	3,146	3,075	3,463	3,426	3,536
Wood Wool, Wood Flour	890	1,124	1,310	1,194	1,065
Railway sleepers	8,852	10,058	12,717	10,174	9,552
Sawntimber	2,304,814	2,724,720	2,527,115	3,098,399	2,540,453
Veneer	125,832	162,268	158,427	149,077	150,250
Mouldings	285,060	347,381	325,314	345,809	322,180
Particleboard	161,093	233,703	203,249	220,657	206,376
Fibreboard	210,103	260,066	308,958	280,359	264,631
Plywood	1,722,048	2,390,026	2,167,365	2,178,305	2,090,695
Densified Wood	942	1,215	1,267	1,011	1,077
Wooden Frames	52,308	48,715	53,264	49,712	49,650
Packaging Materials	22,407	26,341	30,991	28,826	34,603
Casks and Barrels	15,803	20,132	21,500	23,650	26,442
Tools, Bodies and Handles	10,103	13,005	14,714	15,304	15,769
BJC	1,036,415	1,351,232	1,357,340	1,516,414	1,440,782
Tableware and Kitchenware	202,307	248,099	265,076	255,333	258,848
Wood Marquetry	80,470	98,303	108,077	105,174	112,904
Articles of Wood	578,305	696,474	688,689	692,747	682,854
TOTAL	10,462,314	12,554,538	11,951,919	12,467,368	11,684,072

Source: UN Contrade

Import tariffs on timber and timber products under the MJEPa are zero except the tariffs for plywood under HS Code 4412 which are from 6% to 10%.

Rates Under Malaysia-Japan Economic Partnership Agreement (MJEPa) Effective 13 July 2006

Product	Japan Tariff Rates
Logs	0
Sawntimber	0
Veneer	0
Mouldings	0
Particleboard	0
MDF	0
Plywood	6-10
BJC	0
Furniture	0

Prospects

Japan has currently registered positive economic growth despite global economic crisis pressures. But like any other countries, Japan too has also been significantly affected by the current financial crisis. Growth predictions for Japan are on a lower side, considering its capabilities

to ward off adverse effects of the global economic crisis.

The Timber Supply and Demand Conference of Japan, which was formed by the five groups of imported wood products, came up with the projection of demand for 2016. According to the projection, there will not be any significant change on both import of logs and lumber. Housing starts are expected to exceed over 2015 then they would decline again in 2017 so the import of wood products are likely to decrease in 2017 again. Total demand for imported logs and lumber are 9.6 million m³, almost the same as 2015. New housing starts in 2016 are estimated at about 940,000 units as opposed to 910-920,000 units in 2015, an increase of approximately 2-3%. Rush-in demand before the consumption tax is increased to 10% starting April of 2017 seems to be insignificant.

In a new 10-year national housing plan drafted by Japan's Ministry of Land, Infrastructure Transport and Tourism, the government has set a target for the nation to have about 4 million or fewer abandoned apartments and houses by fiscal 2025. The plan will be considered by the Cabinet in March 2016. In order to achieve the target mentioned, the plan proposes for some abandoned apartments and houses to be put back on the selling block.

These houses have been proposed to be sold to families with children and those with low-income. The plan also proposes to expand the existing home market to JPY8 trillion (EUR62.62 billion/USD68.35 billion) in fiscal 2025 from JPY4 trillion in fiscal 2013. It also proposed for

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the refurbishment market to be expanded from JPY7 trillion to JPY12 trillion over the said period. The government also intends to increase by two-fold the replacement of aging condominiums from the 250 replacement cases recorded between fiscal 1975 and 2014.

Furthermore, the Council formed by all the wood industry companies in Kyoto prefecture has been discussing to stimulate the wood manufacturing business and to expand local wood consumption inside the Kyoto prefecture. The largest target is to build a cross laminated timber (CLT) manufacturing facility with an annual production of 50,000 m³. Other businesses are fundamental strengthening of the local log supply capacity and supply of kiln-dry lumber. The plan is for three years, from 2016 to 2018 and the start of CLT manufacturing will be in 2018.

Six billion yen will be invested for manufacturing facilities including CLT. In 2016, focus is on solidifying existing manufacturing facilities including the increase of kiln dry capacity of sawmills, then introducing five biomass boilers for drying and power generation and finally, starting up structural laminated lumber and small CLT manufacturing facilities to form a multiple manufacturing system.

The real gross domestic product (GDP) in Japan is projected to increase by JPY13.60 trillion (EUR103.04 billion/USD113.09 billion) or 2.59% compared to fiscal 2014 on the back of the free trade agreement under the Trans-Pacific Partnership (TPP), according to the government. The increase is projected to be achieved in the span of about 10 to 20 years following the implementation of the TPP.

Japan expects the merger of investment and trade regulations in the region as well as the decrease and exemption of tariffs, may contribute to about 30% out of the projected increase in GDP, while another 70% is projected to be contributed by the hike in corporate productivity following the rise in income and employment. The TPP is also projected to cause a drop of a maximum of JPY210 billion in domestic production of forestry, agricultural and fisheries products compared to the estimated JPY3 trillion in 2013.

Even though Japan continues to expand its local wood consumption, based on the economic scenarios, the prospects of increasing the shipments of Malaysia's timber and timber products to the Japanese market appears to be very positive in the coming years.

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- MTIB 



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COMING EVENTS - MAY 2016

DATE	EVENT	VENUE	ORGANISER
5-8	SENFEX 2016 International Furniture, Home Textile and Decoration Fair	Senegal International Commerce Centre, Senegal	Sisemi Senegal Tel :+ 221 33825 1512 Fax :+ 221 33825 1519 E-mail : sisemiseneal.com
7-10	CIFEX 2016 City Furniture Exhibition of Iran	Tabriz International Exhibition Centre, Iran	Tabriz International Exhibition Co. Tel :+ 98 (411) 6373851 8 Fax :+ 98 (411) 6373850 60 E-mail : info@tabrizfair.ir
11-14	FIDEXPO 2016 B2B Moscow Furniture Exhibition	Krasnaya Presnya Expo Centre, Moscow, Russia	Restec Exhibition Company Exhibition Corp. Tel :+ 7 (812) 320 6363 Fax :+ 7 (812) 320 8090 E-mail : main@restec.ru
12-15	MYANMARWOOD 2016 International Wood Processing Machines, Cutting Tools and Hand Fair	Myanmar Convention Centre, Yangon, Myanmar	Chan Chao International Co. Ltd Tel :+ 886 2-2659 6000 Fax :+ 886 2- 2659 7000 E-mail : mis@chancho.com.tw
17-20	MIFS 2016 Moscow International Furniture Show	Crocus – Expo IEC, Russia	Media Globe Tel :+ 7 (495) 961 2262 Fax :+ 7 (495) 961 2262 E-mail : info@mediaglobe.ru
18-22	KONYA IDEAL HOME FAIR 2016 International Furniture Decoration Material and Equipment Fair	Tuyap Konya International Fair Centre, Istanbul, Turkey	Tuyap Fair and Exhibitions Organisation Inc Tel :+ 90 (212) 867 1100 Fax :+ 90 (212) 886 6698 E-mail : sales@tuyap.com.tr info@ bw.cz
21-29	LIFE STYLE FURNITURE 2016 Furniture, Home and Deco Expo	Impact Exhibition and Convention Centre, Thailand	Union Pan Exhibition Co. Ltd. Tel :+ 66 (0) 2314 0855 Fax :+ 66 (0) 2319 8337 E-mail : service@unionpan.com





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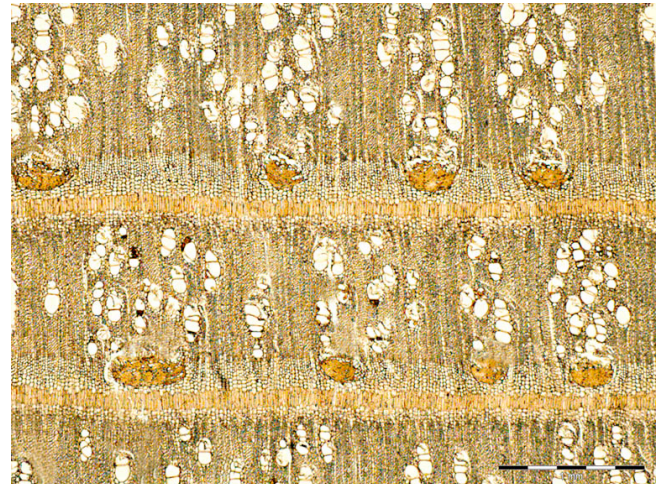
API-API — SUITABLE FOR FURNITURE MANUFACTURING



Api-API tree

Texture

Texture is coarse and uneven due to the presence of islands of included phloem. Grain is straight to interlocked.



Transverse section of Api-API

Introduction

The Standard Malaysian Name for the timber of Avicennia spp. (Avicenniaceae) is Api-API. The sapwood is not differentiated from the heartwood, which is grey-white with purple tinge. Vernacular names applied include Api-API with various epithets. Major species include A. alba, A. marina, A. officinalis and A. rumphiana.

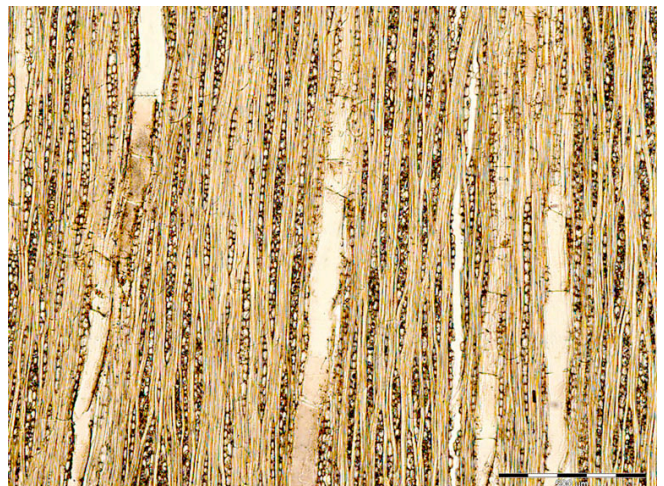
It is also known as Baen (India), Api-api (Indonesia), Thame (Myanmar), White mangrove (Papua New Guinea), Api-api and Bungalon (Philippines), and Samae Tha Le and Samae (Thailand).

Density

The timber is moderately hard and moderately heavy to heavy with a density of 560-785 kg/m³ air dry.

Natural Durability

The timber is not durable.



Tangential section of Api-API

Strength Properties

The timber is reported to be strong and falls into Strength Group B (Burgess, 1958).

Machining Properties

It is reputed to be difficult to work.

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Mechanical Properties

Property	Green		Dry	
Modulus of Elasticity	1.55×10^6 lbf/in ²	10.687 GPa	2.09×10^6 lbf/in ²	14.411 GPa
Modulus of Rupture	11.1×10^3 lbf/in ²	76.535 MPa	16.4×10^3 lbf/in ²	113.078 MPa
Parallel (compression)	4.94×10^3 lbf/in ²	34.061 MPa	8.34×10^3 lbf/in ²	57.504 MPa
Perpendicular (compression)	1.87×10^3 lbf/in ²	12.894 MPa	2.36×10^3 lbf/in ²	16.272 MPa
WML	12.3 in-lbf/in ³	84.809 kJ/m ³	17.9 in-lbf/in ³	123.421 kJ/m ³
Hardness	1,700 lbf	7,561.60 N	NA	NA
Shear	1.37×10^3 lbf/in ²	9.446 MPa	NA	NA

*WML = Work to maximum load

Air Drying

The timber seasons well.

Uses

The timber is suitable for furniture manufacture because of the unique figure produced by the layers of included phloem. Other uses include panelling, mouldings, rice-pounders and as a special firewood for smoking rubber and fish.

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MTIB Moments



A retreat for MTIB Director-General Office's held on 3-5 December 2015 in Johor Bahru, Johor.



Trade Development Retreat held on 3-5 December 2015 in Melaka.



Management Services Retreat held on 4-6 December 2015 in Jitra, Kedah.



Industry Development Retreat held on 4-6 December 2015 in Lumut, Perak.



QCI Competency (Railway Sleepers) Course held from 14 to 17 December 2015 in Negeri Sembilan.