

# ISSUE 19

## 马来西亚家具总会简报 NEWSLETTER

ISSUE 19, JULY 2022

### 马来西亚木材公会出席亚庇Borneo Forest Cooperative (BFC) 研讨会 *MTA attends BFC Symposium in Kota Kinabalu*

马来西亚木材公会会长吴志耀于2022年7月7日率团出席在沙巴亚庇举行的研讨会。该研讨会由沙巴森林局（SFD）和沙巴木材公会（TAS）联手举办，并于沙巴国际会展中心举行。

这项研讨会旨在讨论沙巴州工业植树造林对经济价值链的影响、虫害研究、物种实验和人工林发展的运营管理等问题。

受邀出席研讨会的嘉宾包括沙巴木材公会会长Norman Wong、比勒陀利亚大学的Prof Mike Wingfield、阳光海岸大学的Dr Simon Lawson以及沙巴首席森林保护官Datuk Frederick Kugan。

马来西亚家具总会邱曜仲总会长也代表出席此次活动。活动以在亚庇游艇俱乐部举行的丰盛晚宴结束，与会者也借机交流和建立人脉。

On July 7, 2022 delegates of the Malaysian Timber Association led by its President, Goh Chee Yew attended a symposium in Kota Kinabalu, Sabah. The event was jointly organised by the Sabah Forestry Department (SFD) and Timber Association of Sabah (TAS) and held at the Sabah International Convention Centre.

The symposium titled "Developing Resilient Industrial Tree Plantations in Sabah: Forestry Pests & Diseases" touches on several aspects such as the impact of industrial tree plantation on the economic value chain, the cost of development and more importantly pest and pathogen threats to tropical plantation forestry.

Among the panellist being invited are such as Norman Wong, President of TAS, Prof Mike Wingfield from University of Pretoria, Dr Simon Lawson from University Sunshine Coast and Datuk Frederick Kugan of the SFD.

MFC's representative of the event was President, Mr Khoo Yeow Chong and the event concluded with a sumptuous dinner at the Kinabalu Yacht Club where attendees have the opportunity to build up their networking and exchanging contacts.

Source: BFC Flyer on Developing Resilient Industrial Tree Plantations in Sabah: Forestry Pests & Diseases





## 砂拉越欲制造出口增值家具 *Sarawak to produce export value added furniture*

砂拉越木材行业发展局（STIDC）总经理Datu Hashim Bojet近日宣布，砂拉越将大力推动及发展当地木制下游业，以生产和出口增值家具。

该决定符合木材行业转型计划（TITP）的目标，旨在提高砂拉越的经济发展。

估计到2030年，砂拉越的出口量将达到马币80亿令吉，其中仅家具就占了一半（马币40亿令吉）。

在与马来西亚木材理事会（MTC）和马来西亚种植及原产业部（MPIC）会面后，Datu Hashim Bojet补充，其目的是为了古晋和丹戎马尼家具园寻找吸引潜在投资主力公司。

在获得马来西亚木材认证委员会（MTCC）合格认证下的砂拉越计划，共有450万公顷的长期许可区域和 178,000 公顷的人工林。



Sarawak Timber Industry Development Corporation (STIDC) general manager, Datu Hashim Bojet announced that the state will develop its wood-based downstream sector to produce and export value-added furniture.

The decision was in line with the Timber Industry Transformation Plan (TITP) will seek to bolster the state's coffers.

It has been estimated that approximately RM 8 billion will be generated through exports in 2030 with furniture alone contributing half of the amount (RM 4 billion).



Following an engagement with the Malaysian Timber Council (MTC) and Ministry of Plantation Industries and Commodities (MPIC), he added that the aim was to attract potential investors to become anchor companies with planned furniture parks in Kuching and Tanjung Manis also in the book.

In terms of legality, Sarawak plans to certify 4.5 million hectares of long-term licensed areas and 178,000 hectares of forest plantation under the Malaysian Timber Certification Council (MTCC).

Source:

<https://www.theborneopost.com/2022/07/14/stidc-swak-to-produce-export-value-added-furniture-under-timber-industry-transformation-plan/>





## 挪威最绿色家具工厂 · 成为世界游客体验目的地

*Norwegian Furniture Factory serves multiple roles towards visitor friendly and sustainability*

创意是无限的。为了展示工厂如何与其他设施整合，挪威的家具制造商Vestre在这方面做出了最佳典范。

坐落于挪威东部 Magnor附近森林中的“The Plus”，除了开放式生产设施外也可兼做公共公园，供游客远足和露营，也能在其30万平方米的公共森林公园中漫步。

家具工厂共有四个生产区域，包括：色彩车间、木材车间、组装车间，以及仓库，这四个生产区域分别位于庭院周围的四个侧翼中。中心的空间主要被用于物流办公室和展览所需。得益于此，每个季度的最新产品都可以在这个中心空间进行公共展示。而全透明的车间设计，也使得外部广场的市民可以轻松地看到工厂内部的生产情况。



仅花费18个月就竣工的The Plus，所有的建筑材料都根据其对环境的影响精心选择；外墙由当地木材、低碳混凝土和再生钢材建成而成。同时通过其光伏板、当地水电、雨水收集、电动汽车和其他功能使用可持续能源的缩影，The Plus较同类传统工厂的能源需求量而言，至少降低了90%。

在接下来的五年里，The Plus周边地区将被改造成一座体验公园，配有艺术雕塑、散布在各处巨大Vestre家具，供孩子们玩耍的游乐场、野餐区和小径等。让民众都能在这里体验Vestre的理念。

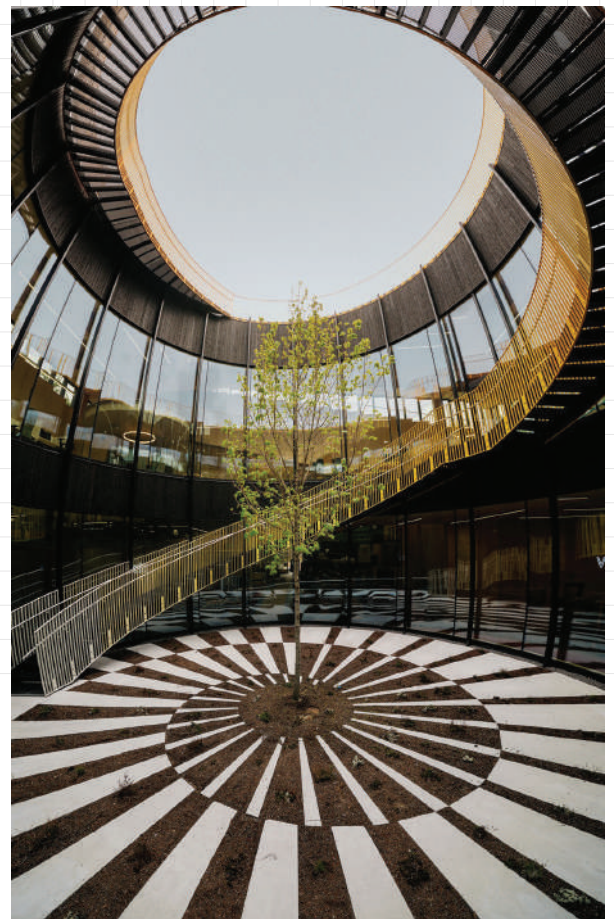
Creativity knows no boundaries. To showcase how factories can be integrated with other facilities, a Norwegian furniture manufacturer, Vestre serves as the best example of such role.

Its factory, 'The Plus' located in the forest outside Magnor offers an experience centre where visitors can enjoy themselves by taking on a plethora of activities such as guided tours, hiking and strolling through the 300- acre public park.

The factory itself consists of a warehouse, colour factory, wood factory and an assembly area with a layout ensuring short commute between the wings. The upper floor offers visitors a 360-degree view of the facility.

Built in 18 months from local mass timber, low-carbon concrete and recycled steel, the premise is the epitome of using sustainable energy through its photovoltaic panels, local hydropower, rainwater collection, electric vehicles and other features which contributes to 90% lower energy demand than a conventional factory.

Over the next five years, the surrounding areas will be transformed to an experience park, complete with art installation, a playground with oversized Vestre furnitures for children to play with, a picnic area and poetry trail which cements 'The Plus' as a perfect place to spend a day.





## ENSURING THE SUSTAINABILITY OF RUBBERWOOD SUPPLY

Dr. Jegatheswaran Ratnasingam (Universiti Putra Malaysia)

Rubber products contributed RM 71 billion in export earnings in 2021. In the larger scheme of matters, commodity exports (including palm oil, rubber, etc) contributes about 15% of the total export of merchandise of the country.

Table 1: Key Rubber Statistics

Year	Total Area under Rubber Cultivation (million ha)	Replanting Area (ha)	Projected Rubber Biomass Output (above 10cm in diameter in million m <sup>3</sup> )	Projected Usable Sawn Timber (m <sup>3</sup> )
2016	1.077	24,500	4.90	612,500
2017	1.081	20,300	4.06	507,500
2018	1.127	21,000	4.20	525,000
2019	1.131	18,400	3.68	460,000
2020	1.139	16,500	3.30	412,500
2021	1.137	16,250	3.25	406,250

Note:

1. Above ground biomass estimated at 200m<sup>3</sup>/ha
2. Sawn timber output at 25m<sup>3</sup>/ha

The fact is the furniture manufacturing industry requires about 600,000 m<sup>3</sup> of sawn rubber wood per annum to sustain its production. Further, almost 40% of rubber biomass (including logs) are being used by wood-based panels manufacturers. Therefore, the targeted replanting area should be at least 40,000 ha per year, in order to meet all domestic demand.

Almost 90% of all rubber area are under the management of RISDA, FELCRA, and the likes. Smallholders, make up almost 100% of the farmers under such schemes, and they rely on replanting subsidy (fixed at RM 9,230 per ha in Peninsular Malaysia, RM 13,500 per ha in Sarawak, and RM 14,000 per ha in Sabah) for the replanting activities involving older trees above the age of 25 years and more. Replanting is done when the trees give poor latex yield.

Taking an average of RM 12,250 per ha (replanting subsidy), in order to ensure 40,000 ha are replanted annually, the total replanting fund should be in the range of RM 490 million. Any short fall, in the replanting subsidy fund, will mean a lower replanting area, which will inevitably lead to lower supply of rubber wood.

### PROPOSED REMEDIAL ACTIONS

1. MTC provides some funding for replanting of rubberwood, while ensuring sufficient supply of rubberwood for domestic demand.
2. Increase importation of rubber sawn timber.
3. Increase the recovery of rubberwood processing mills through technology.
4. Explore overseas acquisition of rubber plantation for domestic supply.

## 2022年忧喜参半的欧洲经济数据 *Europe's mixed outlook of 2022*

欧洲大陆近期面临诸多挑战。尽管许多国家已将新冠病毒视为地方性流行病，但新的问题不断涌出。其中最主要的就是席卷欧洲的高通胀率，以及俄罗斯与乌克兰之间的军事冲突。

虽然欧元区的国内生产总值（GDP）环比增长率为0.6%，但由于消费者面临通货膨胀的压力和商品价格上涨，该地区的家庭消费下降了0.7%。

欧洲锯木厂组织（EOS）预测，2022年的硬木锯木的产量将下降3%。欧洲木地板市场也因此变得更加分化，如意大利、西班牙和斯堪的纳维亚等国的需求上升；而法国和瑞士的销售则停滞不前。

截至2022年6月，欧盟领导人在欧盟峰会上达成一致，批准乌克兰和摩尔多瓦为欧盟候选国。这有利于将整个欧盟成员国加速推进经济 and 金融一体化。

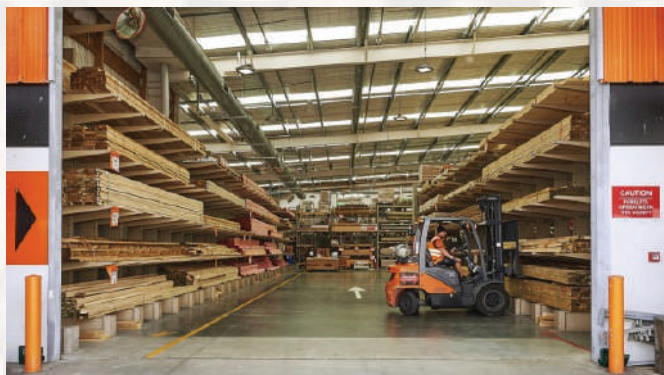


The European continent has been facing many challenges recently. While many countries decided to treat Covid-19 as an endemic, new issues emerge. Chief among them is the rise in inflation and more importantly the conflict in Ukraine.

Despite the Gross Domestic Product (GDP) in the Eurozone increased by 0.6% month-on-month, the household consumption in the area dropped by 0.7% due to inflationary pressure on consumers and rise of commodity price.

In terms of production, the European Sawmiller Organisation (EOS) projected a decline in sawn hardwood production for 2022 by 3%. Whilst the European wooden floor market has become more divided such as countries like Italy, Spain and Scandinavia registered rising demand whereas France and Switzerland saw a stagnation of sales.

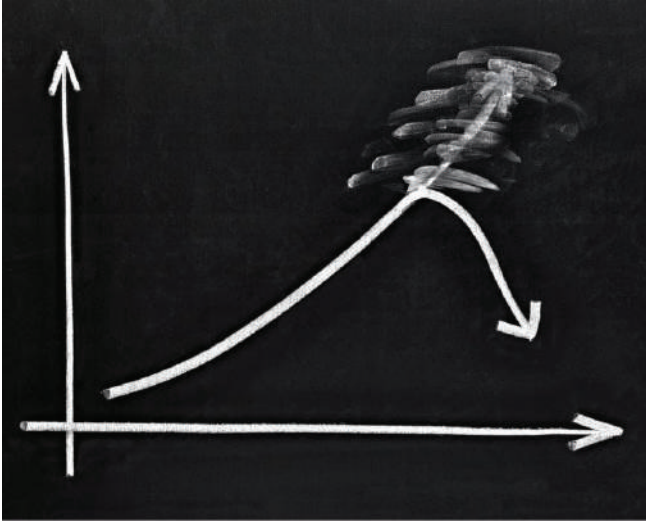
Moving on to more serious affairs, as of June 2022 the European commission has also welcomed Ukraine as a candidate country to join the European Union. This will hopefully ensure a higher level of integration across the continent.



Source: MTC Europe Market Update June 2022



## 经济学家看好美国2022下半年经济持续展现活力 *Recession unlikely in 2022 but 2023 could be different*



尽管美国经济仍旧放缓，但一些美国业者表示，美国今年内不太可能出现经济衰退。美国零售联合会首席经济学家Jack Kleinhenz表示，未来几个月的消费者前景依然乐观。

他补充说，虽然经济正从强劲的增长中逐渐放缓，但就业收入的增加、工资上涨和延长的工作时间将足以支撑家庭开支。

在经济重新开放后，餐馆5月份的销售额每月增长0.7%，同比2021增长17.5%。航空运输量也在上升，2022年6月上半月在机场接受安检的乘客数量仅比2019年6月的数量低12.5%。

尽管如此，Jack Kleinhenz提出警惕，在看似乐观情况的背后，2023年可能将会是一个不同的局面。根据最新的研究显示，美国经济衰退的风险约为三分之一，并处于一触即发的状态。

While the US economy is slowing down, some quarters said that a recession hitting the States is unlikely this year. National Retail Federation Chief Economist, Jack Kleinhenz said that consumer outlook over the next few months remains favourable.

He added that while the economy is moving away from extremely strong growth demand towards moderate growth, increased incomes from employment, rising wages and more hours worked is expected to support household spending.

After the reopening of the economy, restaurants registered an upward of sales of 0.7% monthly for May and 17.5% for year-over-year. Airline traffic is also up with the number of passengers screened at airports in the first half of June 2022 only 12.5% below June 2019 figures.

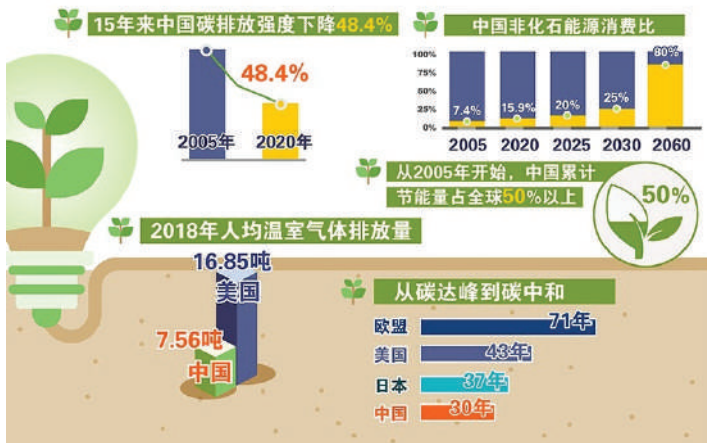
Nevertheless, behind the sense of optimism, Jack cautioned that 2023 could be a different story as recent research shows that the risk of a recession is about one in three and it will be in a touch and go mode.



Source: <https://www.furnituretoday.com/furniture-retailing/nrf-says-a-recession-is-unlikely-in-2022-but-2023-could-be-a-different-story/>

# 中国为实现碳排放目标奠定财政政策基础 日本冀望成为创业强国

## China lays fiscal policy foundation to reach carbon targets · Japan aims to become a start-up powerhouse



中国为了实现经济脱碳,采取了一些措施;例如在2021年拨款3,500亿元人民币支持绿色低碳发展、降低柴油机滤清器等环保产品的关税、以及电动汽车购买补贴。这些措施在2022年到期后可能会延长至2023年。

从市场需求来看,5-6月份是木材业的传统淡季。正因如此,印茄木、山樟木、红娑罗双木、橡胶木等木材的需求下降,并希望对这些木材的需求很快再次回升。

邻国日本则冀望成为创业大国,同时希望增加其初创企业的数量,而大力支持及鼓励现有的企业扩大规模。在过去十年里,初创企业的融资金额稳步上升,在2021年达到了7,801亿日元。

在木材需求方面,目前日本所有主要港口的库存仍充足,普通胶合板的需求依然低迷。虽然用于混凝土成型的涂层胶合板的需求增加,但据估计,在不久的将来并不会大量来货,因此短缺的情况似乎会继续下去。

In an effort to decarbonise its economy, China has been undertaking measures such as allocating RMB 350 billion in funds to support green and low-carbon development in 2021 as well as reducing tariffs for some environmental products like diesel engine filters and subsidies for the purchase of electric vehicles (EVs), which may be extended to 2023 after expiring in 2022.

In terms of market demand, May and June is traditionally the off-season for the timber industry. This resulted in the declining demand of certain timber such as Merbau, Kapur, Meranti, Rubberwood and it is hopeful that demand will pick up again soon.

Moving to its neighbour, Japan intends to become a start-up powerhouse where it wants to increase the number of start-ups while encouraging existing ones to scale-up. The amount of financing start-ups has risen steadily over the past decade reaching ¥780.1 billion in 2021.

In terms of timber demand, regular plywood remains sluggish as inventories at all major Japanese ports remain full. Whilst the demand for coated plywood for concrete forming increases, nevertheless it has been estimated that there will be no large arrivals in the near future and thus the shortage appears to continue.

Source: MTC East Asia Market Update for June 2022

### The Guidance & the Action Plan sets the below main objectives:

Vision	Targets	Target Year	Baseline Year	Specific Targets	Firstly Announced in
An initial framework for a green, low-carbon and circular economy and greatly improved the energy efficiency of key industries created	Energy consumption per unit of GDP	2025	2020	Reduce by 13.5%	14 <sup>th</sup> Five-Year Plan
	CO <sub>2</sub> emission per unit of GDP		2020	Reduce by 18%	14 <sup>th</sup> Five-Year Plan
Significant accomplishments from the comprehensive green transformation in economic and social development, with energy efficiency in key energy-consuming industries reaching advanced international levels.	CO <sub>2</sub> emission per unit of GDP	2030	2005	Reduce by over 65%	Climate Ambition Summit in December 2020
	Share of non-fossil energy consumption in primary energy consumption			25%	Climate Ambition Summit in December 2020
	Total installed capacity of wind and solar power			>1200 GW	Climate Ambition Summit in December 2020
China will have fully established a green, low-carbon and circular economy and a clean, low-carbon, safe and efficient energy system	Share of non-fossil energy consumption in primary energy consumption	2060		>80%	Mentioned for the first time





# 日本家族企业传承的长寿基因



罗伟雄

企业家兼周游列国的MBA讲师。曾于毕马威会计师事务所担任营销总监多年，也是多个亚洲著名政论清谈电视栏目的常驻嘉宾，常探讨经济、商业、政治热门课题与最新市场趋势。

家族企业是人类最古老的组织之一。为什么家族企业会出现？因为人们需要养家活口，为了生计，家族企业应运而生。到了今天，家族企业依然是很多国家经济的主要支柱。放眼全球，我们所熟悉的著名企业如福特、沃尔玛、西门子、丰田、本田、三星、长江集团、现代，都属于家族企业，并且影响深远。在马来西亚的杨忠礼集团、云顶集团、丰隆集团，也是本土著名的家族企业，且这些家族企业也是财阀和豪门，对市场影响举足轻重。

家族企业的定义是：第一，企业的所有权掌控在家族成员手中；其次，家族成员对于企业有很大影响力，尤其是企业的财务权和未来发展；第三，家族企业成员依然在企业里担任要职。

在马来西亚上市公司中，超过70%属于家族企业；而96%的马来西亚中小型企业，基本上都是家族企业。家族企业对于经济的影响，可想而知。

家族企业面临最大的挑战之一，就是家族企业传承。根据学术研究报告，美国家族企业的平均寿命是24年，可见家族企业的寿命比人类寿命短很多。但是，全球有大约五千多家家族企业存在超过百年以上，其中以日本家族企业最具代表性。目前，日本拥有三千多家超过百年的家族企业，而现今全球十家最老的家族企业，日本家族企业就占据了七家。其中的长寿冠军金刚组，成立于公元578年，传承了四十代人。

究竟，日本家族企业的长寿基因秘诀是什么？

首先，日本长寿的家族企业对于企业的运营，都是立足于长期视野的经营理念作为开始。换句话说，对于他们来说，企业经营一定要看长远经营。短期为10年，中期为30年，长期就是100年为基础。这样可以避免企业太过急功近利导致倒闭覆没。长期主义是他们的基本信条。

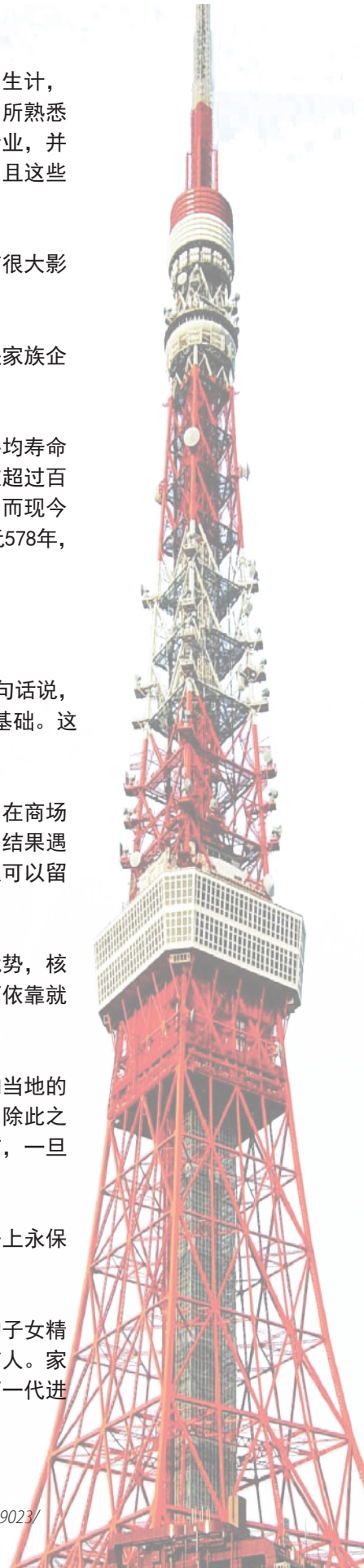
第二，日本长寿企业追求的是“持续成长，量力经营”。它们追求成长，不过是量力而为。在商场中有一句话叫“发展中死亡”，听起来很矛盾，其实就是指企业过度追求扩张或盲目发展，结果遇到突发事件，企业资金链断裂，因此而关门。这些日本长寿企业相当稳健，稳步发展，所以可以留存到今天。

第三，构建和强化自身的竞争优势。这是永远不变的真理。企业永远需要巩固自身的竞争优势，核心能力。这样企业在市场才能够立足，继续保持盈利。企业能够生存就是能够持续盈利，而依靠就是本身的竞争优势。

第四，长期重视和保持与利益相关者的良好关系。这里的相关利益者包括了员工，供应商和当地的社区。因此，在这些长寿企业中，员工的祖父、父亲、儿子三代一起工作的情况并不罕见。除此之外，长寿企业和当地社区高度密切互动，形成了当地社区的一个标志和图腾。长寿企业相信，一旦企业遇到挑战，它们可以依靠当地社区的协助而度过难关。

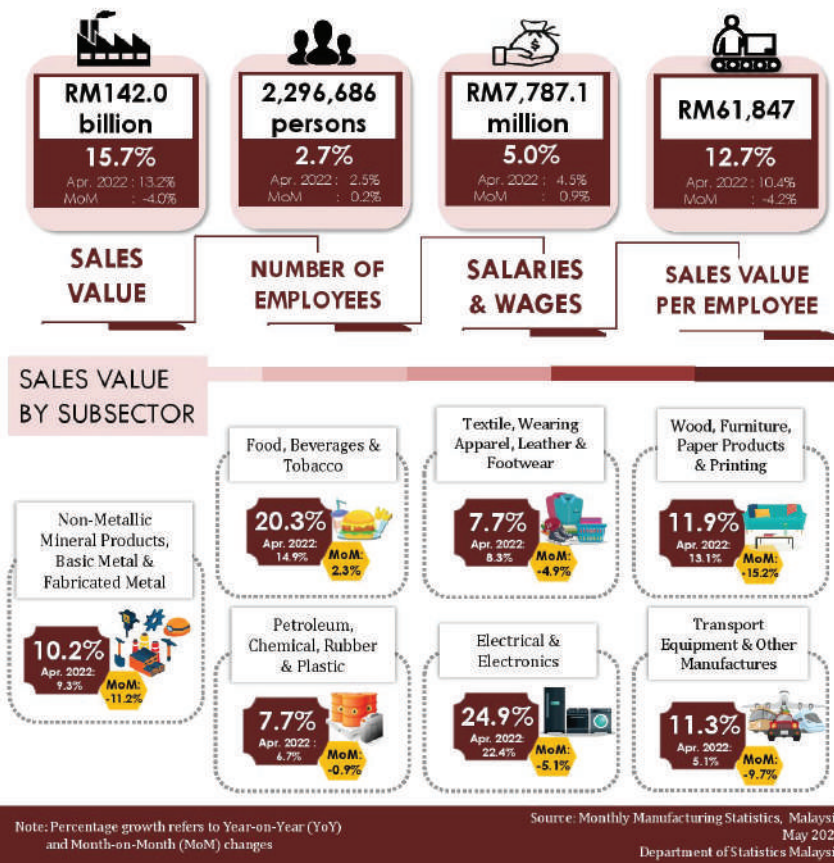
第五，长寿企业在财务上很保守。他们非常看重现金流，而且严谨控制借贷，确保企业财务上永保无虑，这也让企业永保不败之地。

第六，日本的家族企业成员，拥有非常强烈的使命感。家族企业的掌舵人一开始就对自己的子女精心培养，也十分注重对子女的教育。从小让下一代有强烈的家族使命，以让企业不断后继有人。家族企业传承是一个漫长的过程，因此日本家族企业的一把手必须有深刻了解；而从小就对下一代进行教导，耳濡目染，让下一代自然而然接过企业的棒子。





Malaysia's Manufacturing sales registered RM142.0 billion with a growth of 15.7 per cent in May 2022



PERFORMANCE OF WHOLESALE & RETAIL TRADE, MAY 2022

