

A photograph of a birch forest. In the foreground, a wooden chair is partially visible, with a white object resting on it. The background is filled with birch trees and green foliage. The text is overlaid in the center of the image.

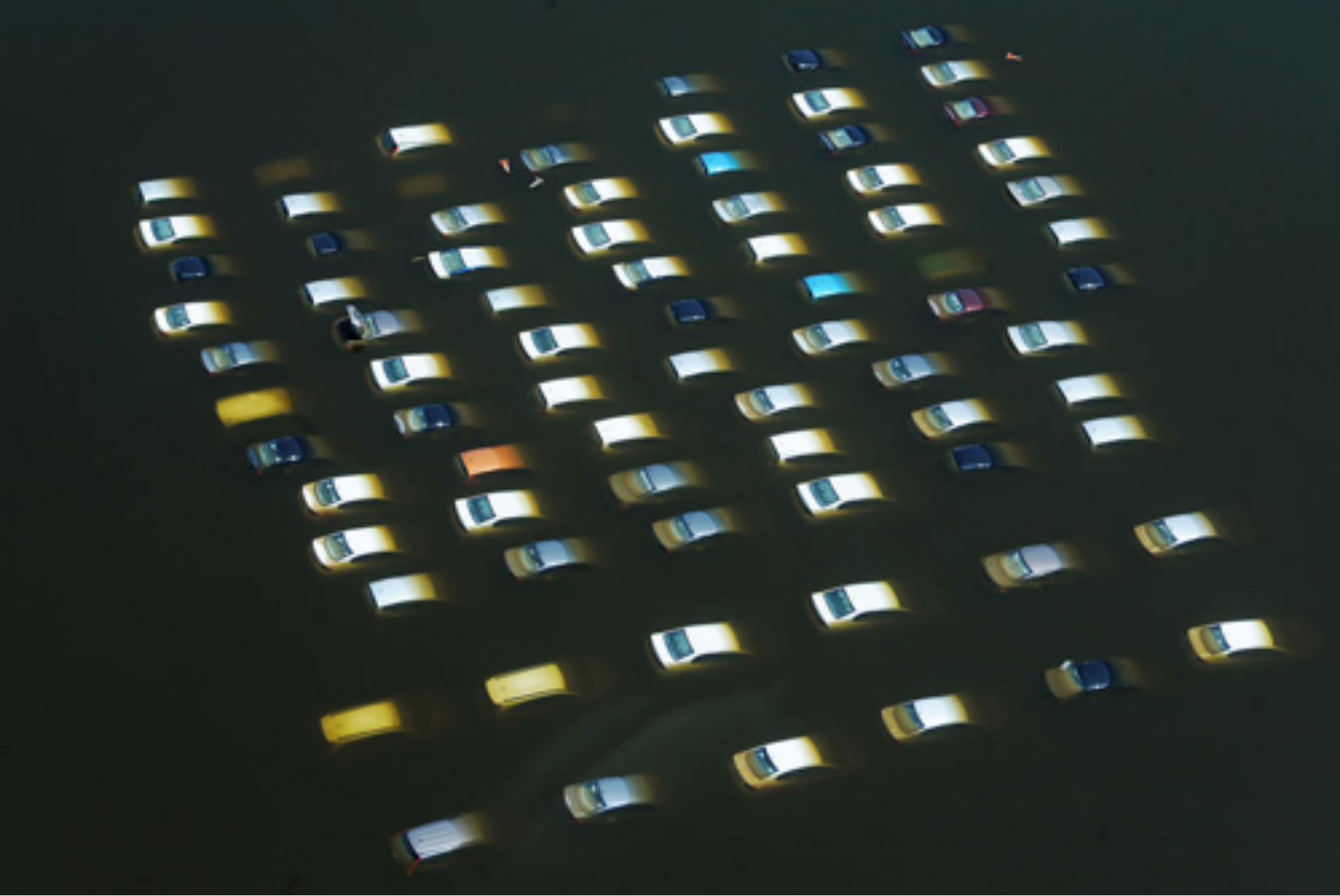
**"Open trade drives  
finished  
product exports and  
design opportunities"**















The warning is painful.

Lessons must be learnt.

















Sustainable living  
It's real!

Forest related sectors are the group to be blamed.



**Strategy of Thailand?**

**"Open trade drives finished product exports and design opportunities"**



**We are**

**small**



Wood licenses  
8,000 enterprises

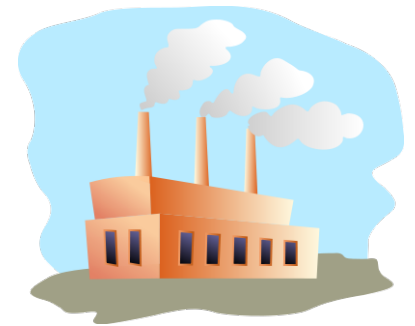
# Furniture manufacturers in

**Thailand**  
1,500 registered factories  
(ministry of industry)

–Large scale 52 factories

–Medium scale 210  
factories

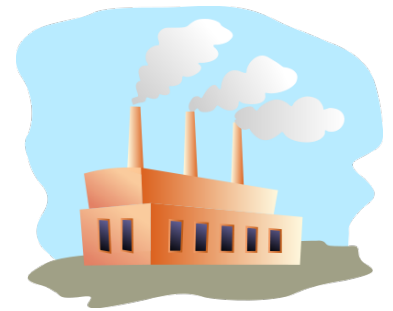
–Small scale 1,238  
factories





# Furniture manufacturers in

- Public Listed **Thailand** factories
- 170 export-oriented
- 8000 micro industries non-registered



1500 total /176 export

Most of them SMEs

**We are**

**small**



**SME**



# SME

Slow and Unproductive and  
Incompetitive.

They don't want to listen to  
more documentation

**Facts**

- Forest is 33%
- (target 40% : 25/15)
- Commercial  
plantation: Eucalyptus,  
Rubberwood and  
Teak



# 2016 Sales in the nutshell

- Furniture export US\$ 1000 millions (-5%)  
(wood furniture about US\$ 600 millions)
- Wood product export US\$ 2000 millions  
(wood sawn timber about US\$ 800 millions)
- Wood construction export US\$ 1200 millions

# FURNITURE & INTERIORS MARKET Thailand

<b>Total Housing Starts</b>	<b>100,000 units/year</b>
<b>Total Number of Households</b>	<b>17,000,000 units</b>
<b>Furniture Production</b>	<b>2,000 million US\$</b>
<b>Total Furniture Imports</b>	<b>400 million US\$</b>
<b>Total Furniture Exports</b>	<b>1,000 million US\$</b>
<b>Total Furniture Consumption</b>	<b>1,400 million US\$</b>
<b>•Total Commercial Mkt</b>	<b>500 million US\$</b>
<b>•Total Repair / Remodeling Mkt</b>	<b>500 million US\$</b>

**We are**

**small**





# Facts

- 2016 growth -5% so far
- 60% of export furniture are wood furniture and natural fibres.

**\* Focus on the domestic  
markets**

Due to increase in the tourists  
influx. (31 millions persons)

# Natural material oriented (wood, natural fibre)

Rubber wood, Teak Wood,  
tropical woods, Water Hyacinth,  
Bamboo, Coconut



# Situation Today

Legality Assurance System?.

1960s to the mid-1980s

Peak exploitation  
rampant deforestation and forest  
degradation

# In 1896

RFD was established to assume overall management for forest resources and set policy direction.

In 1961, total forest in Thailand was 27 million hectares (53% of the country's land areas)



# Old Laws

- The Elephant Conservation Act
- The Forest Conservation Act 1916
- The National Preservation Forest Act 1938
- The Fishery Act 1947

# Plus new laws

- Revising the forest law 1941
- The National park Act 1961
- The National Preservation Forest Act 1963
- The wide animal reservation and protection act 1960
- The National Park Act 1961
- The National Reserve Forest Act 1964

In 1988

DEFORESTRATION drives to  
14.8 million hectares of forest  
land (29 percents)

# In 1989 logging ban

Government declared the logging ban in the terrestrial forests throughout the country and initiated forest zoning.



# Since the logging ban, its forest management approach has 3 objectives

- To expand designated protected areas
- To expand plantations to substitute wood supplies from natural forests
- To develop community forestry

In 1991

The government approved the  
measures for managing  
mangrove forests and coral  
reefs

# Implementing plantation laws

- Forest Act (Plantation forest) B.E. 2535 (1992)
  - Banning of use of national reserve forest land for private forest plantations 1992
  - The Wildlife Preservation and Protection Act 1992
  - The Plant Protection Act 1992
  - The National Environmental quality Promotion and Conservation Act 1992
  - Classification of the National Reserve Forest Area 1992

Thailand has become  
the net-importer  
of primary forest products.

# Construction

- 6 million tons
- Import from Malaysia, Laos, USA, etc
- domestic





# Furniture & millworks

- 9 million tons
- local plantations: teak, rubberwood, etc
- Domestic/ export



# Pulp and Paper

- 5 million tons
- local/ imported:  
Eucalyptus, Acacia, etc
- Domestic/export



# Energy

- 10 million tons
- Eucalyptus, Acacia, Rubberwood
- domestic



# Thailand wood consumption ...in a nutshell

- 30 million tons
- Or 50 millions Cubic Meter
- About 1-2% of the world consumption



# The 10<sup>th</sup> National Economic and social Development Plan 2007 - 2011

To maintain and restore biodiversity  
and conserve natural resources and to  
maintain the forest area at 33% and  
protected area no less than 18%

# The 10<sup>th</sup> National Economic and social Development Plan 2007 - 2011

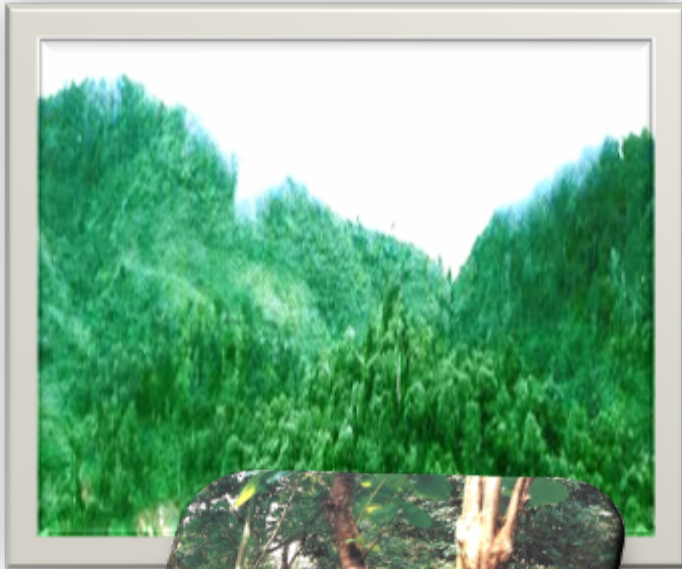
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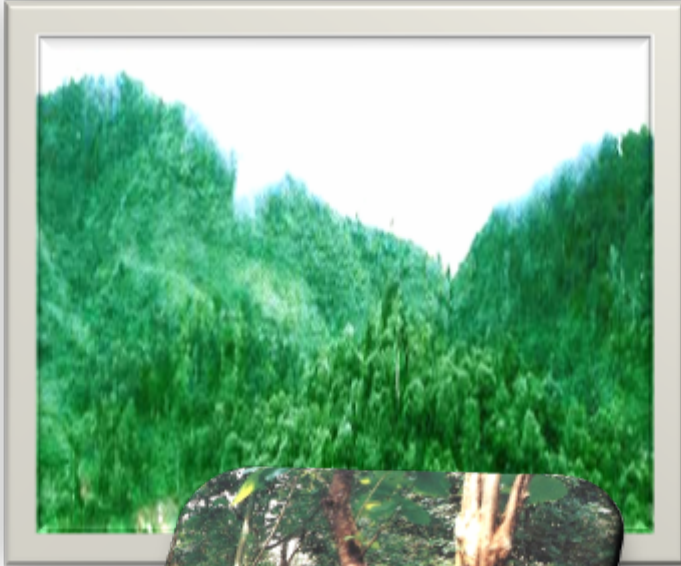
# Thailand



- **51.3 millions**  
**hectars of**  
**land**
- **65 millions**  
**population**



- **37.1%** forest estate.  
(about 18,972,000 ha)



**35.5% primary forest  
(the most biodiverse and  
carbon dense)**



**44% naturally regenerated  
forest**

**20.5% planted forest**

# **The new situation..**

No more indigenous long rotation species plantation.

the farmers replaced them with agroforestry or annual cash crops  
rubberwood tree, sugar cane,  
cassava

Why?

- Long rotation species plantation are less profitable.
- Not enough incentive systems from the government.
- Lack of government's supportive mechanisms for planting and processing of long-rotation tree species.
- No access to investment funding.
- No planning



- Constraining regulations. Legal disincentives and barriers: permits, licenses, controls, especially when compared with the promoted species like parawood, cassava or sugarcane. Regulations need to be reviewed and replaced.
- Weak marketing for the long rotation species.
- Difficult start-up processing industries

**Risks**

- Livelihood opportunities using long-rotation tree species are under developed including biodiversity arising from the forest.
- Mono-cropping or over concentration of annual cash crops, soil conditions are declining.
- Farmers have limited access to construction timber for housing and furniture making.

# How we implement the law? Thailand Legality Assurance System



To respond to  
World Demands

etc

LACEY ACT

EU FLEGT

Australia Timber Regulations

# TLAS in Thailand

- Nation based
- License based



# Laws involved in TLAS

- Forest Act, (Forest Product) B.E. 2484 (1941):
- Forest Act (Natural Reserve) B.E. 2507 (1964)
- Forest Act (Plantation forest) B.E. 2535 (1992)
- Forest Act (saw motor) B.E. 2545 (2002)
- Protocol on certification of timber, products and wood charcoal for export B.E. 2552 (2009)
  
- LOG BAN in B.E. 2530 (1987)

# Resource



3 sources

- Importation wood
- Own Plantation
- Rubberwood

- companies/ private owners registered at RFD for the right to harvest (license based)
- all species except rubberwood and fruit trees

- RFD issue processing license / trade license to the required enterprise.
- Annual license (need to re-apply every year)
- Factory needs to control their timber count/ stock account on the daily basis for inspection.

- Law enforcement by National and Environmental Police
- No new sawmill license for natural forest timber allowed only sawmill permits for rubberwood plantation.

# Supply Chain





- Mobility license (wood license) valid 24 hours
- Soon to be upgraded on-line system through single window

- Paper based in all process  
(logging – trading)
- License based in all process  
(logging – trading)



What need to be done more?



Thailand by RFD is agreed to  
follow through VPA negotiation  
with EU

# Legal compliance (VLC)

## Legality mechanism

- Legal origin

Sources of timber/ Land ownership/ concession/ Official Permit based/ inventory check (private land/ natural forest)

# Legal compliance (VLC)

## Legality mechanism

- Right to procure/harvest:  
Licensing base/  
consignment base/  
documentation process

# Legal compliance (VLC)

## Legality mechanism

- Tracking Procedures:  
Tracking document/  
Movement permit/ territory  
checking stations/ Inventory  
tracking and control process

- Independent monitoring unit to be developed.
- Institutional placement of the licensing body.



- Regional information sharing & exchanging within the region on TLAS development and intel on illegal logging activities in the region.

- Coordination on the On-Line TLAS within the region.  
(ensure the same IT configurations / same harmonized codes) for Single Window

Single window is part of the  
good governance roadmap

# Sustainable Forestry Management Standard (SFM)

Modelled after ISO 14061/ FSC/ itto criteriors,  
SFM standard and certification scheme is  
suitable to the situation in Thailand to try to  
accommodate the rubberwood plantation and  
small lot plantation.

Standard for environmental  
friendly wood manufacturing

## Green Label

- Rubber wood Products
  - Plywood
- Rubber wood materials
  - Packaging

Wood Products: door and  
window









POSTED AT  
theCHIVE.com

**HOW**

**?**





**DESTINATION!**



The background of the image is a soft-focus photograph of a forest. Several birch trees with their characteristic white bark and dark lenticels are visible. In the lower-left foreground, a white wicker chair is partially visible, with a white hat resting on its back. The overall scene is bright and natural, with a bokeh effect that makes the background elements appear out of focus.

**TIFF**

**Thailand International**

**Furniture Fair**

**MARCH**

**2009: Imagine Green Living**





Department of Export Promotion  
Ministry of Commerce  
Royal Thai Government

IMAGINE  
GREEN  
LIVING



THAILAND INTERNATIONAL FURNITURE FAIR 2009

เวรจําพราคา 11-13 มีนาคม 2552 (10.00-18.00 hrs.)

จําพราคา 14-15 มีนาคม 2552 (10.00-20.00 hrs.)

ณ อาคาร เดอะ สแควร์ อิมพีค เมืองทองธานี

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**2010: Living a green life**





Department of Export Promotion  
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# Living A Green

Life  **TIFF  
2010**

Furniture Decor & Lifestyle

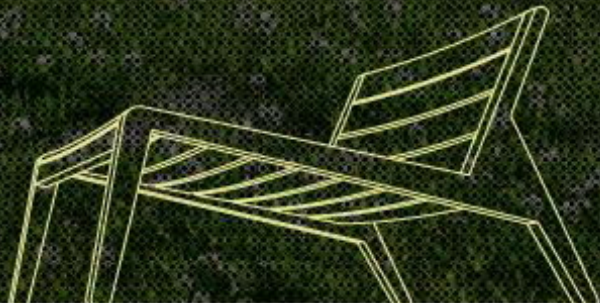
## THAILAND INTERNATIONAL FURNITURE FAIR 2010

Trade: 10-12 March 2010 (10.00-19.00 hrs.)

Public: 13-14 March 2010 (10.00-21.00 hrs.)

The Challenger, IMPACT, Muang Thong Thani, THAILAND

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# 2011: Finding Green Pieces



Furniture Decor & Lifestyle

# Finding Green Piece

THAILAND INTERNATIONAL FURNITURE FAIR 2011

Trade: 16-18 March 2011 (10.00-18.00 hrs.)

Public: 19-20 March 2011 (10.00-21.00 hrs.)

BITEC Bangna, Bangkok, Thailand

[www.thailandfurniturefair.com](http://www.thailandfurniturefair.com)

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2012: Fill Green Feel Good



 **TIFF**  
**2012**  
Furniture Decor & Lifestyle

# FILL GREEN FEEL GOOD

THAILAND INTERNATIONAL FURNITURE FAIR 2012



[www.thailandfurniturefair.com](http://www.thailandfurniturefair.com)





**TIFF  
2010**  
See you again in March 2011

Business Meeting of International Day of Livestock In Challenge 3  
Trade Mission





















































Anything AWAY, there is no AWAY!

Help our troubled ecology with DESIGN











































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DEESAWAT

M Hall







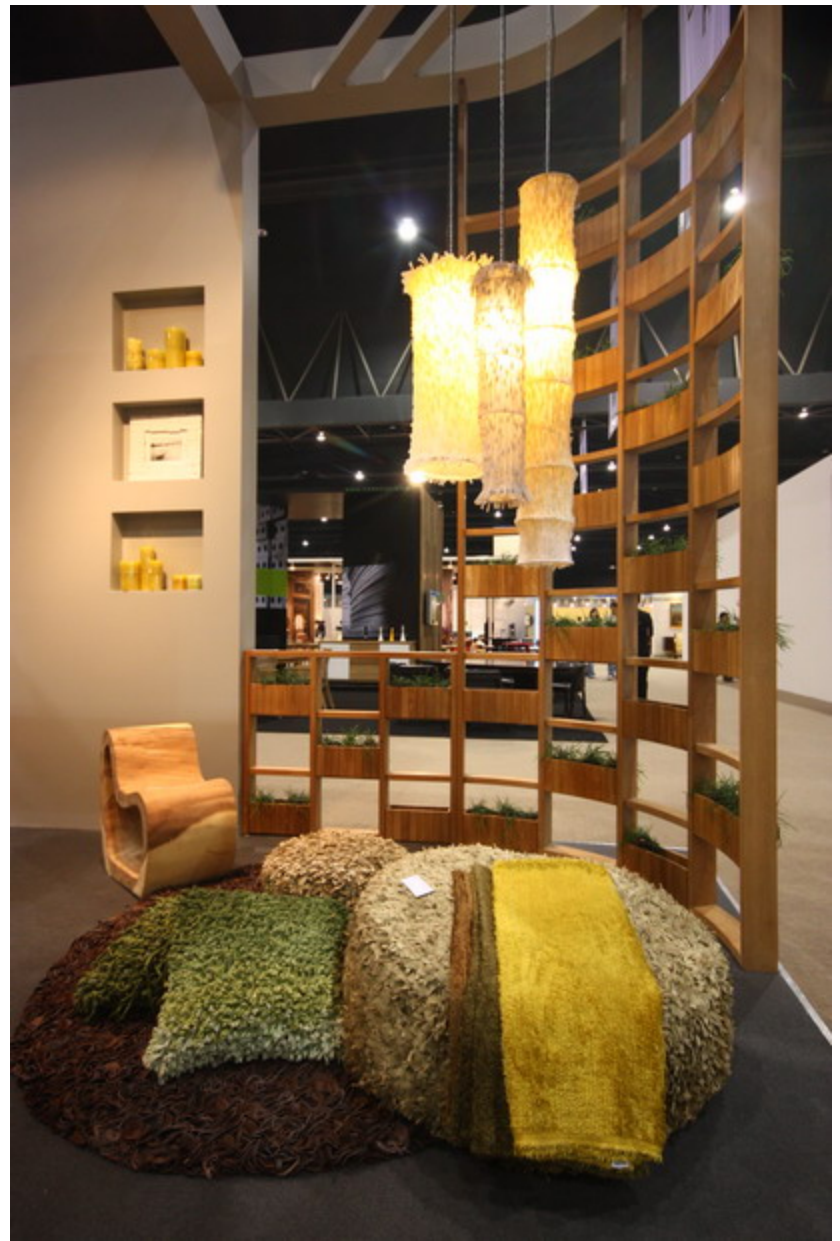
































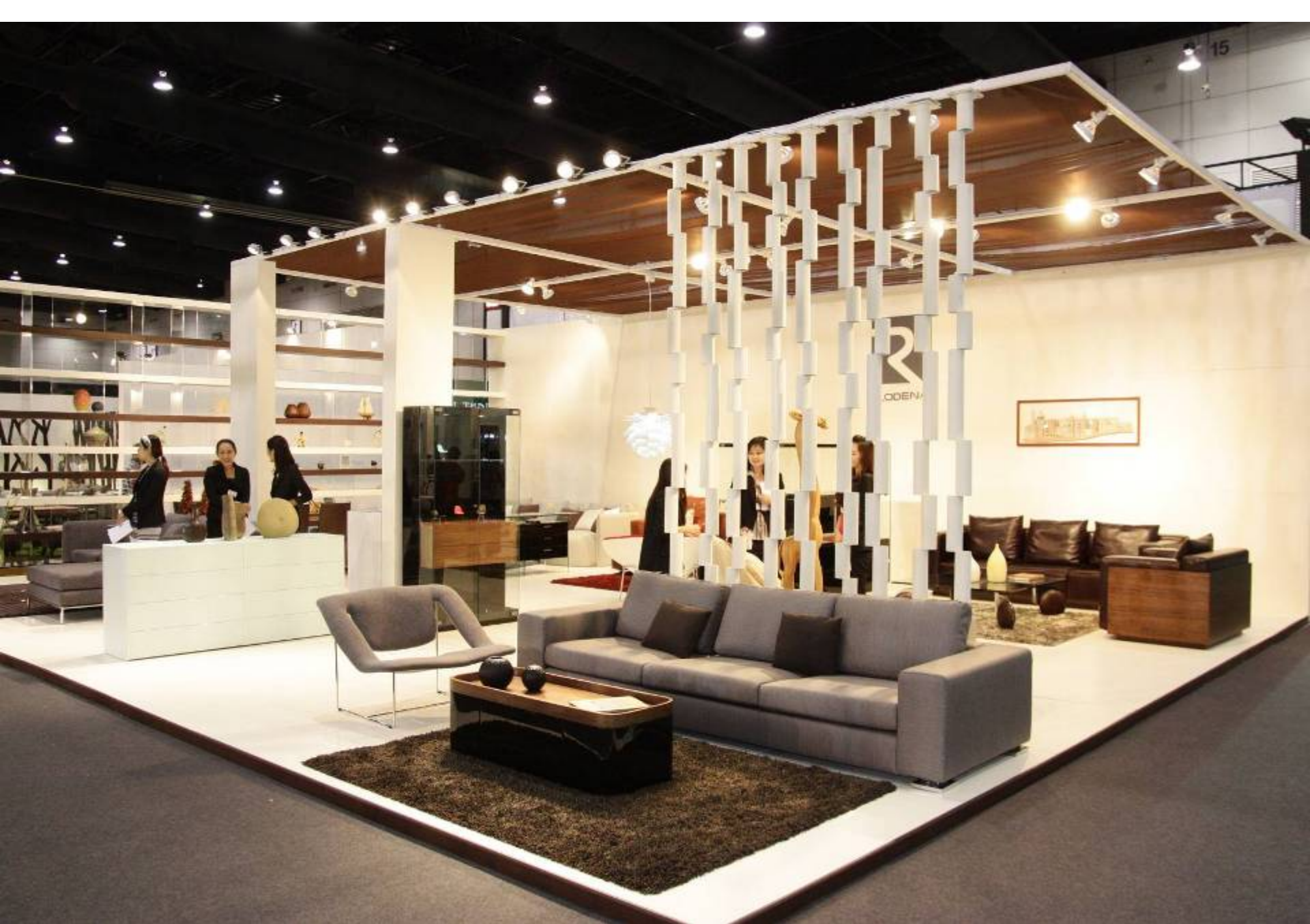










































# YOTHAKA

THE ORIGINAL SINCE 1989







# How to let people know??







My Thai Design is...  
“a way to soothe the spirit,  
awaken senses, honor nature and  
dissolve ideas of separation.”

Erin Cowgill, Paris  
Artist, photographer, writer and consultant



# Mythaidesign.com



# Living A Green Life

TIFF  
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## Coming to Thailand!

Don't miss this Furniture Design Fair with Styles for a Greener Planet. Only comes once a year!

E-Direct Mail No.8



### TIFF 2010 "Living A Green Life"

Here is your chance to see this remarkable traveling 'Furniture for a Greener Planet' exhibition that only comes to Thailand once a year! You'll also be able to meet Thailand's foremost designers, manufacturers and suppliers. There will be lots of activities as well as exhibits of the most creative and innovative ideas that also reflect the highest quality and safety for the environment and man.

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### Green Furniture Showcase

The finest furniture for a green life will be only display at the Green Furniture Factory magazine exhibit. The ideas are stylish, innovative and eco-friendly, and clearly demonstrate that Thailand is now among the leaders in the production and export of Green Furniture. This is a must to see because of the quality of materials, meticulous craftsmanship and uniqueness of each design.

Ensure that you have the latest and the greatest possible collections of furniture designs from Thailand that are Inspiring, Original, Green and Admirable.

Visit [www.mythaidesign.com](http://www.mythaidesign.com) today.  
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Living  
A Green  
Life **TIFF** 2010  
Furniture Decor & Lifestyle



The Countdown has begun

For the Green  
Furniture Exhibition  
Only once a Year  
In Thailand

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### TIFF 2010 "Living A Green Life"

Get ready to see the Green Furniture Caravan. This once-a-year showcase will be filled with exhibits of the most creative and innovative ideas by the foremost Thai designers. Here you will be able to discuss new business opportunities with Thailand's best manufacturers and suppliers. With such a comprehensive exhibition, you're certain to find everything you could hope for.



### American Hard Wood Design Camp

TIFF 2010 has organized the American Hardwood Design Camp project to support creative students and give them a stage to display their outstanding work. You don't want to miss seeing these new and innovative ideas as, in the future, these could become top selling furniture and home décor.

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Ready to see...

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Thailand's biggest  
and best  
Green Furniture Exhibition  
Your only chance  
as it comes  
Only Once A Year!

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### TIFF 2010 "Living A Green Life"

This furniture and home décor showcase is Thailand's biggest of the year. Organized by the Department of Export Promotion (DEP) under the Ministry of Commerce, supported by Thai Furniture Industry Club, the Federation of Thai Industries, and Thai Furniture Industries Association, this opportunity cannot be missed. This will be your chance to meet award-winning Thai designers, manufacturers and suppliers as well as see thousands of pieces of furniture and home décor designed and manufactured especially for a greener world.

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### Many Activities Not to be Missed

- Business Matching: Chance to expand business opportunities
- DEmark: Design Excellence Award Exhibition
- Waste to Wealth Project: Furniture produced with recyclable materials
- T Style Project by Toshiyuki Kita: World renowned Japanese designer
- Green Furniture Showcase: Innovative designs conceived to protect our planet
- American Hardwood Design Camp: Innovative furniture designs by creative students

Ensure that you have the latest and the greatest possible collections of furniture designs from Thailand that are Inspiring, Original, Green and Admirable.

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# Furniture

Living  
A Green  
Life   
Furniture Decor & Lifestyle

Showcase  
in Thailand Soon!  
Thousands of amazing designs  
to make our world greener!



## TIFF 2010 "Living A Green Life"

Thailand's foremost designers will be exhibiting their innovative work. Together with a vast selection of furniture and décor, all manufactured using quality materials and production systems friendly to our environment.

## TIFF 2010 comes only once a year!

Hurry to register to exhibit your "green" creations! This is also a great chance to meet potential partners and enlarge your business network.

Thailand's Most Important Furniture Show offers you the chance to select from a wide range of imaginative, stylish products; meet the designers, manufacturers and distributors as well as join many special activities that can help your business grow.

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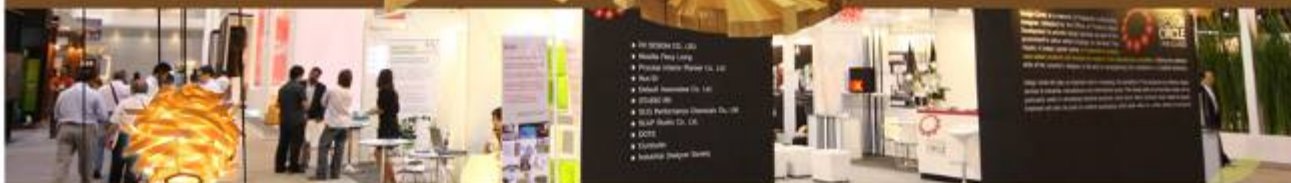


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# Thailand

International Furniture Festival  
Blending Nature  
with Design  
Come Only Once a Year



## TIFF 2010 "Living A Green Life"

This Furniture Trade Show features creations admired worldwide by Thailand's foremost designers, using a variety of natural materials, including those that can replace wood.

This is also your chance to meet designers, manufacturers, traders and entrepreneurs and enlarge your business network.

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TIFF comes just once a year!  
Exhibiting the best design concepts!

A vast selection of smart and stylish furniture and home décor, all designed to help reduce Global Warming.

Here you'll see the results of creative ideas produced with artistry and craftsmanship.

A blend of simplicity and refined elegance manufactured with materials using processes friendly to our environment.

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# The Best...

Thai furniture designs  
that break new ground  
in innovation for  
a Greener Life



## TIFF 2010 "Living A Green Life"

This furniture and home décor fair will unveil the very best, most captivating, innovative designs, certain to please you as well as our environment. Here you will see, the most creative ideas and quality products as well as environmentally safe production processes, reputed the world over.



Expand your vision and business opportunities with the most innovative ideas and industry alliances.

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Featuring the most creative designs and ideas

Far beyond your imagination...

All at TIFF 2010

This is your chance to meet with designers, manufacturers, traders and entrepreneurs and enlarge your business network. Take advantage of this rare opportunity to examine furnishings, equipment, raw resources, interior design materials, and more as suppliers unveil their latest designs that go beyond all expectations in creative thinking while they help reduce global warming.

**Register Now**

To attend  
BUSINESS  
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**Pre - registration**

Available now  
at [TIFF2010.com](http://TIFF2010.com)

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**Exhibitor**

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**Special**

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Awesome



designs! Amazing Ideas!

Thousands of Thai-created  
Eco-friendly  
'Green' Designs...  
What everyone is waiting for!



### TIFF 2010 "Living A Green Life"

This furniture and home decor fair features stylish solutions to combat global warming and preserve our climate. The designs are extraordinary. The colors spellbinding. The creativity beyond description. Innovative designs creativity up to development of natural materials to produce new. A vast collection of innovative products, both Thai and from abroad, produced with all forms of natural materials unveils for you a whole new dimension in furniture design and manufacturing.

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This is your chance to build  
closer business relationships!

TIFF comes just once a year to Thailand.  
It's the biggest gathering and your best  
chance to meet designers, manufacturers,  
and the movers of the Thai furniture industry.  
With as many as 800 booths, here is a sure  
opportunity to expand your business  
prospects and success.

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# Living A Green Life

**TIFF 2010**  
Furniture Decor & Lifestyle



## Furniture for A Green Life

Thousands of  
Stunning Designs  
Showcase is  
Coming Soon!

E-Direct Mail No.5



### TIFF 2010 "Living A Green Life"

The Thailand outstanding furniture fair unveils a whole new dimension in design innovations. This year, keep on following reduce global warming trend, manufacturers and designers persist in presenting their newest designs in this event. With the country's high potentials, TIFF 2010 will also offering attractive investment opportunities to discover new networks and success. Come to visit TIFF 2010, you will clearly see and understand just how exceptional Thailand's manufacturers, materials, skilled craftsmanship and suppliers truly are..



### THAILAND INTERNATIONAL FURNITURE FAIR 2010

Trade : 10-12 March 2010 (10.00-19.00 hrs)  
Public : 13-14 March 2010 (10.00-21.00 hrs)  
Venue : The Challenger, IMPACT, Muang Thong Thani, Thailand  
[www.thailandfurniturefair.com](http://www.thailandfurniturefair.com)

*Hurry to register! This festival comes only once a year!*  
For the best furniture and home décor  
Featuring the most creative designs and ideas  
Far beyond your imagination...  
All at TIFF 2010

### "T Style Project" The outstanding Thai designs, displayed by renowned Japanese designer

The winners of the 'Contract Market' project held in Japan will be on display in total lifestyle concept. Chosen by Toshiyuki Kita, one of Japan's foremost designers, this impressive collection of Thai export designs clearly show just how outstanding Thai products are when compared to the best of the world.

Register Now  
To attend  
**BUSINESS  
MATCHING**

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# The Best in Furniture Design

Living  
A Green  
Life **TIFF 2010**  
Furniture Decor & Lifestyle

The Best for  
a Green Life 

The Best Creative Innovations  
Here, in Thailand!

E-Direct Mail No.6



## TIFF 2010 "Living A Green Life"

Thailand's biggest and best furniture & home décor showcase offers you the best chance to expand your business. Here you can meet the foremost Thai designers, manufacturers and suppliers. You can also take a close look at their stylish creations designed with natural materials to help reduce global warming with thousands of designs on display.

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## "DEmark" the mark of design excellence

DEmark, or the Mark of Design Excellence, showcases award winning designs in two categories: Industrial Handicrafts and Industrial Products. Organized by the Thai government as a special design project, TIFF 2010 will serve as the stage for this outstanding furniture.

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Living  
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Life  T I F F  
2010  
Furniture Decor & Lifestyle



Almost Here!

Don't miss this  
'Once-a-Year'  
Furniture for  
Greener Living  
Showcase!

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### TIFF 2010 "Living A Green Life"

With more than 800 booths featuring the finest furniture and home décor, you can see the most innovative designs created by Thai designers for a greener life. You can also meet and talk to the designers, manufacturers and suppliers, known for their quality, world standard, innovative products. Coming just once a year, TIFF 2010 is a rare opportunity that cannot be missed!

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### Waste to Wealth Project

Another of the TIFF 2010 supported projects, 'Waste to Wealth', organized to support Thai Industrial Technology Development (ITAP), showcases furniture produced from waste products. It unveils for you another avenue to help reduce global warming using recycled materials. These Valued Added Furniture are an important alternative to protect our ecosystem and preserve our environment. These innovative products are certain to be an amazing surprise!

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**TFIA**  
THAI FURNITURE  
INDUSTRY ASSOCIATION









**Creativity & Sustainability**  
**Cultural craft**





# GREEN and Design Thainess



# Jirawat Tangkijngamwong (JIRO)



Chairman

The Thai Timber Association



Chairman

ASEAN Forest Product Industry Council



VP

Vice President

Thai Furniture Industry Association

Vice Chairman

Council of Asia Furniture Associations (CAFA)



Dep MD Deesawat Industries Co.,Ltd

MD & Creative Director Deesawat Design

Thank you







# Thailand: TLAS friendly country

