Forest Governance and Value Chains Programme

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Guyana Furniture Market Assessment Report

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Executive summary

Context

This report presents the findings of a market study on the wood furniture industry in Guyana. It was commissioned under the EU–Guyana Forest Partnership, supported by the EU Forest Governance and Value Chains Programme (FGVC) implemented by FAO. The Forest Partnership aims to strengthen forest governance and promote sustainable, value-added forest industries that contribute to decent employment and economic growth based on sustainable forest management. The study responds to Milestone 2.2 of the Partnership's roadmap, which focuses on enhancing value addition and trade in forest-based products and prioritises support for the local furniture industry, as proposed by the Guyana Manufacturing and Services Association (GMSA).

Objective of the study

The main objective of the study was to assess the viability of existing and potential markets for solid-wood furniture made in Guyana and to identify investment opportunities to scale up value-added manufacturing. The scope included domestic, Caribbean, and European markets and examined opportunities, constraints, and competitiveness across the value chain. The assessment covered local production capacity, raw material availability, equipment, skills, access to finance, and compliance with national and international requirements.

Sector overview

The wood furniture sector in Guyana is largely composed of small and micro-enterprises, most of which are informal and operate from small workshops or residential premises. The number of such workshops is estimated at two to three hundred, but most employ only a handful of workers and operate without modern equipment. This limits their ability to improve quality, invest in certification, or compete with large, mechanised producers abroad. Most producers serve the domestic market, offering household furniture such as beds, kitchen cupboards, wardrobes, and doors. A few larger or more advanced companies produce higher-value custom designs using modern machinery, but these represent a small share of total output.

A combination of factors holds back the local industry. Access to raw materials is a major constraint. While Guyana's forests offer a wide variety of high-quality hardwoods, only half of the manufacturers have regular access to kiln-dried or graded timber. Inconsistent drying and grading reduce durability and finishing quality, while shortages of affordable, properly processed wood drive many to use imported materials such as MDF, plywood, and pine. Most workshops use outdated machinery and lack adequate workspace. Access to training and skilled workers is very limited, while finance is difficult to obtain because many businesses are informal and cannot provide collateral or financial statements. As a result, most manufacturers supply only the local market, and often on a made-to-order basis.

Market opportunities

Despite these challenges, there are real opportunities for growth.

- **Domestic demand**. The domestic furniture market is growing rapidly, driven by rising incomes, a major construction boom, and large government and private housing programmes. Over 50,000 new house lots have been allocated in recent years[1], new hotels are being built with more than

[1] Source: https://newsroom.gy/2025/07/03/47-of-50000-house-lots-went-to-women-90-to-low-income-families/

2,500 additional rooms planned, and public infrastructure investment is rising sharply. Furniture budgets in government procurement alone exceeded USD 40 million between 2023 and 2025. Imports doubled from about USD 10 million in 2020 to over USD 20 million in 2023. Including local production estimates, total annual market demand is valued at roughly USD 32 million annually. Imports currently meet about 70% of this demand, while local producers cover 30%. Local producers are competitive in custom-made and higher-quality segments but face price pressure from imported furniture, which dominates the low- and mid-range markets. Institutional and hospitality buyers increasingly recognise the quality of local hardwood furniture but emphasise the need for reliable delivery, consistent finishing, and formal documentation.

- **Export**. Exports remain very limited. Only a small number of manufacturers export occasionally, mostly to the Caribbean, and none currently export to the EU. Between 2020 and mid-2025, total wooden furniture exports amounted to about USD 334,000, with nearly 90 per cent going to CARICOM markets such as Barbados, Dominica, and Grenada. This represents less than one per cent of Guyana’s total wood exports.

- **Regional demand**. The Caribbean market offers considerable potential. CARICOM countries imported more than USD 600 million in wooden furniture between 2020 and 2023, with Jamaica, Trinidad and Tobago, Antigua and Barbuda, and Barbados as the main importers. Most of this furniture is imported from the United States, China, and the EU. Guyana supplied only about 0.2% of total imports despite its strong forest resource base, duty-free access and proximity. There is growing regional demand for high-quality, sustainably produced furniture for hotels, resorts, and residential developments, which Guyanese producers could target if supported with improved production capacity, finishing quality, and supply reliability.

- **Export potential beyond CARICOM**. In 2023, global trade in wooden furniture was valued at between USD 78 billion and USD 94 billion. The European Union was the largest importer, accounting for 38.5% of total trade, followed by the United States with 30%. In the EU, the most promising opportunities lie in the high-end solid wood segment that values craftsmanship, unique design, and sustainable sourcing. Niche markets exist for live-edge pieces, handcrafted designs, and furniture with strong storytelling appeal. Guyana’s durable hardwoods, artisanal skills, and potential for traceability offer advantages, but the sector lacks the certification, standardisation, and design sophistication required to meet EU buyer expectations. Above all, access depends on the use of certified timber and full compliance with the EU Timber Regulation and the upcoming EU Regulation on Deforestation-free Products, as well as other mandatory EU product and industrial standards.

Main constraints

The sector faces six main bottlenecks:

- **Informality -** Two-thirds of workshops operate in residential areas, which prevents them from obtaining environmental authorisation and voluntary sustainability certification.

- **Skills shortages -** Almost eight out of ten manufacturers cannot find trained joiners, spray finishers or machine operators.

- **Outdated tools and facilities -** Most producers rely on hand tools or old equipment, while only a small minority have kilns or spray booths.
- **Weak certification and standards -** FSC or PEFC certified timber rarely reaches local manufacturers, grading rules are not enforced in the domestic market, and there are no clear quality standards for furniture.
- **Lack of dedicated institutional oversight for the value-added wood sector -** This results in unreliable production data and limited supply chain traceability for furniture, restricting access to regulated markets such as the European Union
- **Limited access to finance -** Informality and lack of collateral prevent most small businesses from accessing bank loans or investment support.

Priorities for action
With focused support from government and development partners, the furniture sector can expand and create greater local value. The main priorities can include:

- **Establishing industrial estates** where small manufacturers can work in properly zoned facilities with shared kilns, finishing rooms and storage.
- **Strengthening the managerial and operational capacity** of Guyana's furniture manufacturers through targeted, industry-specific training and mentoring
- **Investing in skills development** through apprenticeships, vocational training and short, practical courses in joinery, finishing and machine operation.
- **Strengthening links between manufacturers and buyers** in the domestic market, in the wider Caribbean and eventually in the European Union.
- **Developing a joint marketing and brand-building platform**, supported by training in digital promotion and customer engagement.
- **Expanding voluntary sustainability certification** and introducing clear furniture quality standards to raise confidence among buyers.
- **Extending Guyana's timber traceability system** to include furniture manufacturers to ensure full supply chain transparency and maintain access to EU and other environmentally sensitive markets.
- **Supporting small businesses** with access to finance through tailored credit schemes and business development services that help them prepare sound business plans.
- **Local procurement reforms** using phased local content rules, supplier pre-qualification, and coordinated monitoring to ensure public and private projects source more furniture locally, strengthening the sector's competitiveness and job creation.
- **Establish an inter-agency furniture task force** to coordinate support programmes, marketing, data monitoring, industrial clustering, and policy updates, strengthening governance, investment attraction, and international competitiveness of Guyana's furniture sector.

Recommended investments

To strengthen Guyana's furniture sector and make it more competitive, the following strategic investments could be prioritised:

- **Set up independent kiln drying facilities** to improve the quality of lumber, allow the use of underutilised timber species, support export readiness, and provide profitable services for manufacturers.
- **Create furniture manufacturing cluster zones** with shared infrastructure, services, and management to increase efficiency, improve compliance and quality, lower costs, and enhance competitiveness.
- **Introduce structured systems to connect buyers and sellers** through trade fairs, digital B2B platforms, and procurement readiness programmes, helping manufacturers reach institutional, regional, and export markets.

Summary

Overall, Guyana's wood furniture sector shows solid craftsmanship, strong domestic demand, and growing interest from institutional and regional buyers. However, low mechanisation, inconsistent material supply, limited training, and weak compliance continue to limit competitiveness. With targeted investments in quality improvement, industrial workspaces, skills, and traceability systems, the sector could substantially increase its contribution to value-added exports, job creation, and sustainable forest-based development.

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Acronyms

Acronym	Full Form	Description
B2B	Business-to-Business	Transactions between companies, relevant for furniture export and digital platforms.
CARICOM	Caribbean Community	Regional trade bloc that Guyana is a member of, which provides duty-free access to regional markets.
CARIBCAN	Caribbean–Canada Trade Agreement	Trade arrangement granting preferential access to the Canadian market.
CBI	Centre for the Promotion of Imports from Developing Countries	CBI contributes to the economic development of developing countries by strengthening the competitiveness of companies from said countries, and connecting them to the markets of the European Union and EFTA
CNC	Computer Numerical Control	Technology used in precision woodworking and furniture manufacturing.
CoC	Chain of Custody	Certification that tracks certified wood from forest to finished product, essential for FSC/PEFC compliance.
COP27	27th Conference of the Parties to the UNFCCC	International climate summit where Guyana signed its Forest Partnership with the EU.
CSME	CARICOM Single Market and Economy	Framework allowing free movement of goods, services, and people within CARICOM.
CVQ	Caribbean Vocational Qualification	Regional skills certification standard, important for aligning Guyana's TVET training.
DFI	Development Finance Institution	Public or semi-public institutions that finance development-oriented projects.
EPA	Environmental Protection Agency	The national regulatory body responsible for environmental management in Guyana
EUDR	EU Regulation on Deforestation-free Products	Forthcoming EU law requiring proof that products (including furniture) are deforestation-free.
EUTR	EU Timber Regulation	Current EU regulation (to be replaced by EUDR) requiring proof of legal timber sourcing.
FAO	Food and Agriculture Organisation of the United Nations	Implements the EU's Forest Governance and Value Chains Programme in Guyana.
FM	Forest Management	Type of FSC/PEFC certification for responsible forest operations.
FP	Forest Partnership	EU–Guyana MoU promoting sustainable forest management.
FPDMC	Forest Products Development and Marketing Council	Facilitating body for the marketing of forest products in Guyana.
FPIC	Free, Prior and Informed Consent	International safeguard under the United Nations Declaration on the Rights of Indigenous Peoples, required by the EUDR.
FPA	Forest Products Association of Guyana	Industry body representing forestry and wood product producers.
FRF	Forestry Revolving Fund	Government–bank facility providing credit to forestry businesses.
FSC	Forest Stewardship Council	International certification scheme for sustainable forest management and wood products.
GBTI	Guyana Bank for Trade and Industry	A local commercial bank runs SME financing schemes.

GGMC	Guyana Geology and Mines Commission	Government agency regulating the mining and natural resources industry.
GFC	Guyana Forestry Commission	The main forestry authority oversees logging, sawmilling, and traceability.
GNBS	Guyana National Bureau of Standards	Oversees quality and safety standards, including for furniture.
GNFCS	Guyana National Forest Certification Scheme	Guyana's national forest certification standard, endorsed by PEFC.
GO-Invest	Guyana Office for Investment	National agency for investment promotion and export development.
GMSA	Guyana Manufacturing and Services Association	A private-sector association that represents manufacturers, including furniture producers.
GRA	Guyana Revenue Authority	National tax authority, relevant for business registration and compliance.
GTI	Government Technical Institute	Major technical training institution in Guyana, relevant for furniture training.
GYD	Guyanese Dollar	Local currency, often referenced in financing schemes.
HCV	High Conservation Value	Environmental and social values protected under FSC and other certification schemes.
HS	Harmonised System	International tariff classification system used in trade data.
ILO	International Labour Organisation	UN agency promoting labour rights, referenced under EUDR compliance.
ILPA	Illegal Logging Prohibition Act	Australia's law regulating legal timber imports.
IPED	Institute of Private Enterprise Development	Local financing institution providing SME loans.
LKS	Lesser-Known Species	Timber species not widely marketed, but important for diversifying supply.
MDF	Medium-Density Fibreboard	Engineered wood product used in furniture production.
MINTIC	Ministry of Tourism, Industry and Commerce (Guyana)	Government ministry supporting industrial development and trade.
NAREI	National Agricultural Research and Extension Institute	Research body supporting agriculture and agroforestry.
NGO	Non-Governmental Organisation	Stakeholders in certification, training, and sector support.
NIS	National Insurance Scheme	Guyana's mandatory social security system for employers and employees.
NTC	National Toshaos Council	Indigenous Peoples' representative body in Guyana.
NTFPs	Non-Timber Forest Products	Forest products other than wood, e.g., kufa, nibi, tibisiri.
PAC	Protected Areas Commission	Manages Guyana's national parks and protected areas.
PEFC	Programme for the Endorsement of Forest Certification	International certification system, endorses Guyana's GNFCS.
PWG	Political Working Group	The body overseeing the Forest Partnership between the EU and Guyana.
SME	Small and Medium Enterprise	Central category in the report; most furniture producers fall here.
THAG	Tourism and Hospitality Association of Guyana	Represents the hospitality sector, a key furniture market.
TVET	Technical and Vocational Education and Training	Training system important for building sector skills.

TWG	Technical Working Group	Implements and monitors Guyana's Forest Partnership Roadmap.
UKFRC	UK Forest Risk Commodity Regulation	Forthcoming UK regulation on deforestation-free imports.
UKPact	UK Partnering for Accelerated Climate Transitions	UK-funded programme supporting low-carbon development in Guyana.
UKTR	UK Timber Regulations	Current UK law requiring legal timber sourcing.
UNFCCC	United Nations Framework Convention on Climate Change	International treaty under which COP climate summits are held.
USD	United States Dollar	Currency reference in financing and procurement.
VAT	Value-Added Tax	Tax administered by the GRA, relevant for businesses.
WITS	World Integrated Trade Solution	Trade database used for market analysis in the report.

1 Introduction

1.1 Background and context

The EU Forest Governance and Value Chains Programme (FGVC), funded by the European Union and implemented by FAO, supports the implementation of Forest Partnerships (FP) with partner countries. These partnerships are a key EU instrument for promoting sustainable forest management and legal forest-based value chains, while enhancing forest governance, economic development, and climate resilience.

In November 2022, the EU and Guyana signed a Forest Partnership MoU at COP27, followed by a joint roadmap in June 2023 outlining over 50 activities. These aim to:

1. Increase protected, restored, or sustainably managed forest areas;
2. Create more decent forest-related jobs;
3. Maintain Guyana's near-zero deforestation rate;
4. Facilitate investment and trade in legal and sustainable wood products.

FGVC support is structured around two pillars:

1. Strengthening forest governance, protection, and restoration;
2. Developing legal and sustainable forest value chains.

The Forest Partnership's roadmap is reviewed regularly to ensure its effectiveness, efficiency, feasibility and practicality. A Political Working Group (PWG), comprising the Vice President or Minister of Natural Resources, other representatives of the Government, and the EU Head of Delegation or EU Member State representatives, oversees the management and implementation of the Forest Partnership, provides strategic direction and addresses proposals from the Technical Working Group (TWG). The TWG is responsible for reviewing the roadmap's structure, developing its technical content, coordinating proposals for implementation, monitoring and evaluating progress, engaging stakeholders, and reporting to the PWG.

The TWG includes representatives from the Ministry of Natural Resources, the Guyana Forestry Commission (GFC), the National Agricultural Research and Extension Institute (NAREI), the Guyana Geology and Mines Commission (GGMC), the Protected Areas Commission (PAC), the National Toshaos Council (NTC), the Environmental Protection Agency (EPA), and the Guyana Manufacturing and Services Association (GMSA), as well as the Head of Cooperation and/or other representatives from the EU Delegation to Guyana.

A key milestone in Guyana's roadmap (Milestone 2.2) focuses on enhancing value addition and trade in wood products. In this context, the TWG prioritised support for the local furniture industry. The GMSA, the TWG member representing the private sector, proposed action in three areas:

- Strengthening processing capacity and skills;
- Promoting the use of sustainably sourced wood;
- Creating stronger market linkages.

This prompted the present market study, which seeks to identify opportunities to scale up the Guyanese wood furniture sector.

1.2 Objective of the study

The main objective of the study is to assess the viability of existing and potential markets for solid wood furniture made in Guyana and to identify concrete investment opportunities to scale up value-added manufacturing.

1.3 Scope

The study encompasses:

1. Wood furniture - The term “wood furniture” covers a wide range of products, and trade databases often do not clearly differentiate between specific types. The Harmonised System[2] (HS) provides some structure, with codes 9401 and 9403 including office, bedroom, kitchen furniture, seats with wooden frames, cane furniture, and other unspecified wood furniture. However, other value-added wood products such as doors (HS 4418), tableware and kitchenware (HS 4419), ornaments (HS 4420), and picture frames and similar items (HS 4421) are classified separately under Chapter 44. Nevertheless, in retail practice and many trade datasets, these products are frequently grouped under the broader category of “furniture” or “value-added wood products.” To reflect this usage and ensure consistency with market perspectives, this study adopts an inclusive definition that incorporates these additional HS categories.
2. Overview of the sector – Existing producers of solid wood furniture and components; availability of kiln-dried timber; use of imported raw materials (e.g. medium-density fibreboard (MDF) and plywood); and access to drying facilities.
3. Opportunities and constraints – Key factors for scaling up, including cost and quality, access to training, infrastructure, equipment, markets, and the potential for clustering small-scale workshops. Also includes a skills gap analysis and consumer attitudes toward lesser-known species.
4. Domestic market potential – Opportunities linked to the construction boom, furniture imports, and competition from substitutes (e.g. composite materials).
5. Caribbean market potential – Especially in the tourism and hospitality sectors, and the possibility of positioning Guyana as a regional furniture hub.
6. EU market potential – Focused on the high-end segment (rather than mass-market). Includes analysis of:
    - Material quality (hardwoods vs engineered wood)
    - Craftsmanship and production models
    - Design trends and sustainability expectations
    - Price ranges
    - Entry points for market access (e.g. retailers and importers)
    - EU buyer interest in Guyanese furniture

[2] The Harmonized Commodity Description and Coding System, also known as the Harmonized System (HS) of tariff nomenclature is an internationally standardized system of names and numbers to classify traded products. It came into effect in 1988 and has since been developed and maintained by the World Customs Organization (WCO) (formerly the Customs Co-operation Council)

  - Gaps between local production and EU standards
  - A shortlist of promising designs for export
7. Strategic recommendations – Short- and long-term actions to strengthen the value-added furniture segment.
8. Investment opportunities – In areas such as:
  - Wood waste transformation (e.g. finger-jointed or turning blanks)
  - Infrastructure and shared facilities
  - Market linkages and branding
  - Production capacity upgrades
  - Skills development
  - Sustainability and certification compliance
9. Complementary actions – Additional steps to support the growth of value-added furniture manufacturing.

This assessment focuses primarily on market dynamics, investment opportunities, and enabling conditions for scaling value-added furniture manufacturing in Guyana. It does not constitute an environmental impact assessment or regulatory compliance review. Environmental management requirements, permitting obligations, and site-specific mitigation measures will be addressed in subsequent feasibility studies, detailed project design, and Environmental Authorisation processes, in close coordination with the Environmental Protection Agency and other relevant authorities.

1.4 Methodology

1.4.1 Methodology for assessing wood furniture industry

The assessment of Guyana's wood furniture manufacturing segment was carried out in four stages.

In the first stage, a questionnaire was developed to collect information on production capacity, equipment, raw material availability, labour, skills gaps, market access, compliance, certification and the overall business environment. Between April and mid-June 2025, the local consultant conducted a structured survey through in-person, video, and telephone interviews. Some responses were collected using Microsoft Forms. In total, 38 manufacturers participated. The responses were analysed to identify key constraints and opportunities for growth in the sector.

The second stage involved a focus group discussion with producers on 18 June 2025, held during the mission of the international consultant. Thirteen key manufacturers were invited for an in-depth discussion on opportunities and challenges for scaling up production, and seven took part - three of them online. Three of the participants primarily work with non-timber forest products (NTFPs), such as kufa, nibi, mokru and tibisiri, often in partnership with local communities. Separate meetings were also held with the Forest Products Association (FPA) and the GMSA on the same day.

The third stage included site visits to five furniture factories – Guy-America, Zayna CNC, Sommerson's Furniture, Shivrattan Moulding, and OM Custom Woodworking – on 20 and 25 June 2025. Additional in-depth interviews were also conducted with Jocelyn Dow, owner of Liana Cane Furnishings, regarding the UK Pact project; Hemraj Kissoon, former Managing Director of A. H. & L Kissoon Limited / Modern Industries Limited (17 June); and the store manager of 401 Furniture Store (17 June);.

The fourth stage consisted of a stakeholder workshop where preliminary findings were reviewed, and feedback was collected from the GMSA, FPA, EPA, and GFC.

1.4.2 Methodology for assessing the domestic market

As with the supply-side assessment, the domestic market analysis was carried out in stages and used two main approaches. The first was a desk study on furniture imports. The second involved gathering buyer-side insights from 20 respondents active in Guyana's furniture market, including project developers, retailers, construction and architecture firms, wholesalers, distributors, and private individuals.

Desk study on furniture imports into Guyana 2020-2023

No data are available on the actual demand for wood furniture in the local market. To address this gap, we analysed furniture import data and applied an estimated ratio of locally produced to imported items to approximate total demand.

Data on wood furniture imports into Guyana over the four-year period 2020–2023 were obtained from the World Integrated Trade Solution (WITS) database.[3] Both importer- and exporter-reported statistics were reviewed. Importer-reported data reflect goods recorded as received in Guyana, while exporter-reported data show what supplier countries recorded as shipped to Guyana. These two datasets often differ, with some records appearing only in one source. To ensure completeness, records appearing only in the exporter dataset were added to the importer dataset to create a consolidated data file.

The analysis uses a broad definition of "wood furniture", covering categories under Harmonised System (HS) Chapters 44 (Wood and Articles of Wood) and 94 (Furniture). The specific HS product groups considered are listed in **Error! Reference source not found.**.

In addition to trade value, we estimated the number of units imported in each category. Items under Chapter 94 are counted by unit, while those under Chapter 44 are measured in weight (kg). To compare across categories, we applied average product weights to convert kilograms into estimated unit counts. Detailed import data for 2020 and 2023, including both weight or unit counts and the average weights used for conversion, are provided in Annexe 10.3.

Table 1 – Harmonised System Product Groups considered in the analysis

HS Product Code	Product Description
4414 00	Wooden frames for paintings, photographs, mirrors or similar objects
4418 10	Windows, French windows and their frames, of wood
4418 20	Doors and their frames and thresholds, of wood
4419 00	Tableware and kitchenware, of wood
4420 10	Statuettes and other ornaments, of wood
4420 90	Marquetry and inlaid wood, caskets and cases for jewellery or cutlery and similar articles of wood
4421 90	Articles of wood
9401 50	Seats of cane, osier, bamboo or similar material
9403 30	Office furniture, wooden

[3] WITS is a global trade platform developed by the World Bank in partnership with UNCTAD, WTO, the UN Statistics Division, and the International Trade Centre

9403 40	Kitchen furniture, wooden
9403 50	Bedroom furniture, wooden
9403 60	Furniture, wooden
9403 80	Furniture of other materials, including cane, osier
9403 90	Furniture parts

Interviews

In the first stage, a questionnaire was developed to gather information on buyer type, furniture preferences, kiln-dried timber requirements, factors influencing purchases, willingness to pay a premium for natural wood finishes, the share of local versus imported furniture, challenges in buying locally, openness to sourcing more from local producers, interest in lesser-known timber species, use of certified products, and improvements needed to encourage local purchases.

Between May and mid-June 2025, the local consultant carried out a structured survey using in-person, video, and telephone interviews, with some responses collected via Microsoft Forms. Respondents included individual buyers, property developers, real estate managers, and construction companies.

The second stage was conducted during the international consultant's mission, focused on major retailers. Interviews were held with A.H. & L. Kissoon Limited / Modern Industries Limited, Gafsons Industries Limited (Gafoors), and 401 Furniture Store (all 17 June); Giftland OfficeMax (19 June); and Unicomer Group's Courts Guyana (25 June).

Engagement with public procurement and the hospitality sector was limited. To fill this gap, indicative demand estimates were gathered from the GMSA, the Guyana Office for Investment (GO-INVEST) and the Tourism and Hospitality Association of Guyana (THAG), based on budget projections and forecasts for new hotel developments. Residential demand was estimated using the number of house lots allocated under government housing initiatives. These sectoral estimates were then combined to provide an indicative overview of current and future domestic demand for wood furniture.

1.4.3 Methodology for assessing the Caribbean and European markets

Caribbean Market

For this assessment, the regional market was limited to the CARICOM community. Data on wood furniture imports into CARICOM between 2020 and 2023 were obtained from the WITS database, using both importer- and exporter-reported statistics. As with the Guyana furniture import data, records appearing only in the exporter dataset were added to the importer dataset to create a consolidated data file.

Using this consolidated data, we analysed furniture imports by CARICOM country, including the origin of imports and Intra-CARICOM trade. We also identified the leading furniture importers among the CARICOM countries between 2020 and 2023. Finally, we assessed the strategic advantages that could position Guyana as a competitive furniture manufacturing hub within the Caribbean, and the interventions needed to fully capitalise on this opportunity.

EU market opportunities

The European market assessment combined global trade data, targeted research, and market intelligence to identify potential opportunities for Guyanese wood furniture.

Global trade analysis
Global wood furniture trade flows were analysed using data from the WITS database to identify the leading importers and exporters.

High-end market segment
The assessment focused on the high-end solid wood furniture segment in Europe, examining material quality, craftsmanship, design, pricing, and distribution channels. Information was primarily obtained from the Centre for the Promotion of Imports from Developing Countries[4] (CBI) platform, an agency of the Ministry of Foreign Affairs of the Netherlands, and complemented by targeted internet research.

Market entry points and buyer mapping
Potential market entry points were reviewed, including retailers and distributors across low-, mid-, and high-end segments; importers and wholesalers; buying and sales agents; and e-commerce channels. Building on information from CBI, targeted online searches were used to identify these opportunities and to compile a list of potential European buyers, retailers, and wholesalers. Buyer interest, partnership potential, and supply chain considerations were also assessed to identify companies offering strong prospects for collaboration with Guyanese manufacturers.

Market alignment and recommendations
The Guyanese product range was compared with EU market demands in terms of materials, design, pricing, certification, and niche opportunities. This analysis informed recommendations on strategic product segments and key design considerations to enhance competitiveness in the European market.

[4] Dutch: Centrum tot Bevordering van de Import uit ontwikkelingslanden

2 Overview of the Guyana furniture industry

2.1 Preamble

The production of solid wood furniture in Guyana is mainly undertaken by small, often informal furniture makers. Unlike other segments of the timber value chain, furniture manufacturing is not currently subject to sector-specific oversight arrangements comparable to those applied to upstream forestry and sawmilling activities. By contrast, upstream activities such as timber harvesting, sawmilling, lumber yards and timber trading are overseen by the Guyana Forestry Commission (GFC) under the Guyana-EU FLEGT VPA and the Guyana Timber Legality Assurance System (GTLAS). As a result, no comprehensive register of furniture manufacturers existed prior to this study.

The GFC noted that information on furniture manufacturers could be sourced from either the Environmental Protection Agency (EPA) or the Guyana Manufacturing and Services Association (GMSA). However, the GMSA does not maintain a formal register, while the EPA's available data cover only establishments against which complaints have been filed. Based on this, at least 129 manufacturing operations are identified, though the actual number is likely higher, potentially approaching 300 (Karen Small, EPA, pers. comm.).

Because no formal register exists and many entries on the EPA's complaints list lacked complete contact details, we relied on the network of our local expert to compile a list of 40 furniture producers, of whom 38 were interviewed.

The 38 manufacturers collectively employ around 220 persons, indicating that the sector as a whole might be employing as many as 1,500 persons, based on the EPA's estimate of 300 producers.

The majority of the interviewed furniture makers are located in Region 4 (Demerara-Mahaica), accounting for 66% of the sample. This is followed by Region 3 (Essequibo Islands-West Demerara) with 16%, and Region 10 (Upper Demerara-Berbice) with 8%. A few manufacturers are based in Region 2 (Pomeroon-Supenaam – 5%), Region 6 (East Berbice-Corentyne – 3%), and Region 9 (Upper Takutu-Upper Essequibo – 3%). The sample suggests that Region 4 is overrepresented, while Regions 2, 3, 6, and 10 are underrepresented.

The interviews indicated that most of these producers are sole traders or unregistered individuals operating from their yard or informal workshops in residential areas. The informal nature of the sector is further reflected in the fact that the majority of furniture makers employ fewer than five people.

2.2 Sector characteristics

Based on the 38 interviews, the main features of Guyana's furniture manufacturing sector are as follows.

2.2.1 Production scale and capacity

Production scale

- **Company size:** Sixty-one per cent of manufacturers are micro-enterprises with fewer than five employees, 29% are SMEs with 5 to 25 employees, and 11% are large enterprises with more than 25 employees (Figure 1).

- **Production volume and capacity:** Estimating national production capacity is difficult, as many surveyed producers were unable or unwilling to provide detailed figures. The increasing use of alternative materials, such as MDF, particleboard, and metal components, further complicates measurement.

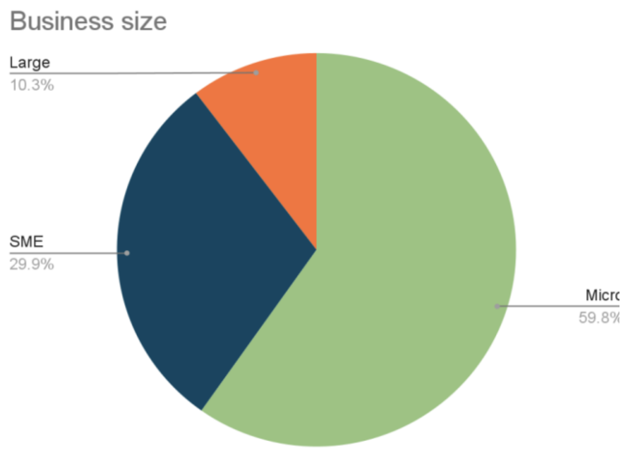

Figure 1: Scale of operation of 38 interview furniture makers

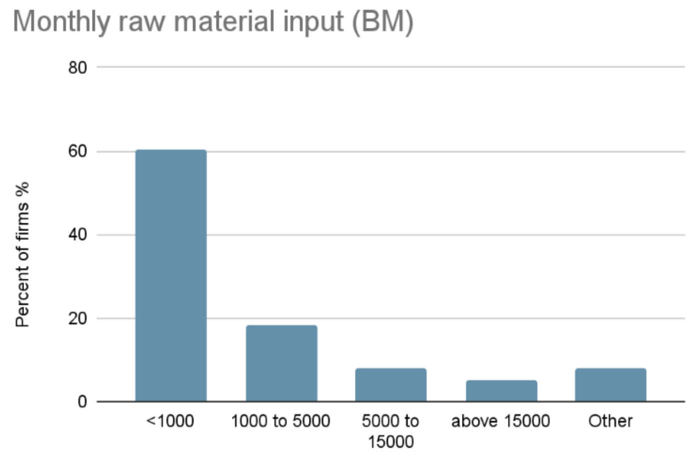

Figure 2: Raw material consumption per month of 38 interview furniture makers

Production levels remain modest for most furniture manufacturers. About 60% process less than 1,000 board foot (≈ 2.36 cubic metres) per month, while only 13% process more than 5,000 board foot (Figure 2). The surveyed furniture makers collectively use around 150,000 board feet of timber per month. Extrapolating to the estimated 300 furniture manufacturing facilities nationwide suggests total sectoral consumption of around 500,000 board feet (≈ 1,180 cubic metres) per month. Assuming production is evenly distributed across product types, the estimated monthly output of key products is shown in Table 2:

Table 2: Estimated monthly production of key products

Item	Number of Units
Doors (34x80)	3,333
Queen-size beds	1,190
Kitchen units (12' top and bottom)	379

Product focus and design capacity

- **Domestic focus:** Most surveyed manufacturers serve the domestic market, focusing on basic household items.
- **Design and workmanship:** Designs range from traditional solid wood furniture to CNC-patterned doors and panels; workmanship is generally known for being durable and well finished.
- **Product flexibility:** Most manufacturers shift between products depending on customer orders and materials availability, making beds one week, doors the next, and then sofa sets or kitchen cupboards. Typical products include kitchen cupboards (81% of manufacturers), beds (62%), interior furniture

such as sofa sets, wardrobes and dining tables (59%), and doors (57%). Several manufacturers also refurbish used furniture.

- **High-value segment:** A small group of manufacturers (9%) is exploring higher-value, unique products such as CNC-carved furniture, live-edge tables, and custom handcrafted pieces. This segment has potential for value-added growth and entry into export or high-end niche markets, but it remains very limited in size.

Key producers and manufacturers

- **Range of manufacturers:** The sector includes large, vertically integrated companies with their own forests, sawmills, and kilns (like *Guy America*), mid-sized cabinet and door shops (like *AS Woodworking*), and small studios using CNC technology (like *Zayna CNC*).

- **History of high-end exporters:** Guyana once had some high-end furniture manufacturers that exported (mainly outdoor furniture) to the EU. Notable examples are *Precision Woodworking* and Guyana Furniture Manufacturers (GFM), both of which ceased operations in 2009 and 2004, respectively. This was the result of a confluence of issues, but increased global competition can be seen as the overarching reason. Capital constraints, inefficiencies, poor economies of scale, and limited ability to modernise made them vulnerable to market shifts and economic downturn under globalised competition. This could have undercut the cost advantage of Guyanese hardwood furniture.

2.2.2 Raw material inputs

Timber species

- Guyana's forests contain a variety of commercially important timber species, each with distinctive wood properties guiding their typical uses. Many of those species are durable but dense, making them mainly suitable for heavy construction. Key references for timber characteristics and usage classifications include Fanshawe (1948)[5] and Gérard et al. (1996)[6].

- Among the most commonly used species, 68% of surveyed manufacturers work with Crabwood (*Carapa guianensis* - Andiroba), 45% Locust (*Hymenaea courbarili* - Jatoba), and 42% Purpleheart (*Peltogyne venosa* - Amaranth). Other notable species include Darina (*Dinizia excelsa* - Angelim Vermelho) at 34%, Silverballi [Lauro (*Licaria cannella* (Brown), *Ocotea canaliculata* (White), *Aniba hypoglauca* (Yellow), *Ocotea oblonga* (Soft Kereti), Ocotea wachenheimii (Hard Kereti), *Ocotea glomerata* (Kurahara)] at 29%, Kabukalli (*Goupia glabra* - Cupiuba) at 24%, Simarupa (*Simarouba amara* - marupa) at 8%, and Wamara (*Swartzia leiocalycina*), Suya (*Pouteria speciosa* - Pajura) at 3%.

- Lesser-known timber species (LKTS), such as Cow Wood (*Bagassa guianensis* - Tatajuba), Tonka Bean (*Dipteryx odorata* - Cumaru), Tatabu (*Diplotropis purpurea* - Sucupira), Hububalli (*Loxopterygium sagotii* - Slangenhout), Shibadan (*Aspidosperma album* – Araracanga), and Tauroniro (*Humiria Balsamifera* - Chanul), remain underutilised due to inconsistent supply. Significant volumes of

[5] Fanshawe, D.B. (1948). Forest products of British Guiana: part I – Principal timbers*. Forestry Bulletin* No. 1. Forestry Department, Georgetown, British Guiana. [Second edition in 1954, third edition in 1961]
[6] Gérard, J., Ter Welle, B. J. H., Miller, R. B. (1996). Major timber trees of Guyana: timber characteristics and utilization*. Tropenbos Series* 15. Wageningen, The Netherlands: Tropenbos Foundation.

underutilised furniture species such as Hububalli exist in forest concessions, but weak market demand from the perspective of the logging and sawmilling industries prevents harvesting, despite their potential to diversify the raw material base and reduce pressure on commonly used timbers.

- All of these species are selectively harvested from natural forests, unlike the plantation-grown timbers of imported furniture from Asia.

Quality of raw materials

- Fifty per cent of manufacturers use kiln-dried wood; 50% use non-graded lumber (Figure 3). Inconsistent grading and drying affect durability, stability, and the quality of finishes. Consistent drying and proper grading are critical for reducing defects such as warping, splitting, or uneven surfaces.
- Under the FLEGT-VPA, a broader programme is underway to upgrade the skills of sawmillers. In March 2025, the FLEGT Secretariat, in partnership with the Forestry Training Centre Inc. (FTCI) and with support from DAI Global, hosted an EU-funded Timber Grading and Sawmill Training. This three-day session provided 18 participants with hands-on experience in timber grading and sawmilling.
- In June 2025, a dedicated sawmilling training site was established in Yarrowkabra. The Yarrowkabra Training Centre hosted timber grading and Occupational Health & Safety (OHS) sessions in August 2025, implemented by FTCI with support from the FLEGT Secretariat and EU funding through IICA Guyana. Training focused on compliance with timber quality standards, OHS best practices, and the Code of Practice for Wood Processing Facilities.

Availability of raw materials

- Sixty-eight per cent of furniture makers report challenges obtaining fit-for-purpose timber due to high prices, irregular supply, and poorly graded wood. Only slightly more than half of producers have regular access to kiln-dried lumber.

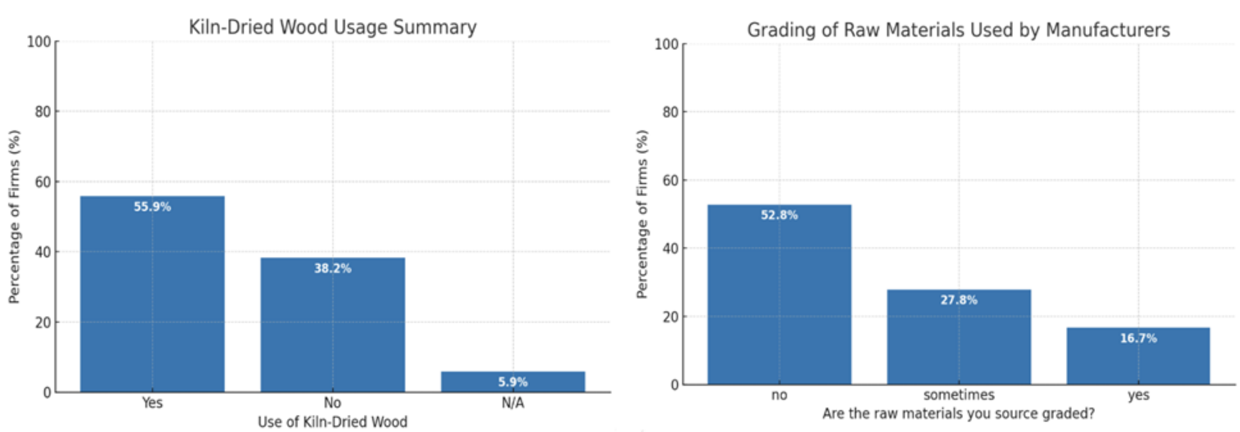

Figure 3: Use of kiln-dried and graded raw material

Imported materials and substitutes:

- **PVC, MDF, Styrofoam, imported pine and plywood** are used to fill gaps, but these materials are often costly. Imported pine is preferred because it is straight, kiln-dried, dressed, and ready to use. Many small manufacturers, however, cannot import MDF or plywood as their orders are too small for a full container.

- **Cross-border trade** with Suriname and Brazil exists but is limited. Suriname offers cheaper, graded sawn lumber, yet trade volumes remain modest, despite both countries being CARICOM members. Some manufacturers import lumber and plywood from Brazil, mainly from timber species that also occur in Guyana's forests.

2.2.3 Equipment, mechanisation, and production constraints

Mechanisation and condition of equipment

- **Mechanisation:** Only 27% of manufacturers use mechanised setups, typically including planers, moulders, sanding machines or Computer Numerical Control (CNC) routers (Figure 4). Over 70% rely on hand tools such as chisels, basic drills and manual sanding.

- **Condition of equipment:** Around 53% of manufacturers reported their machinery to be in fair or poor condition. High costs, limited access to finance and a lack of trained technicians often delay repairs or upgrades. This makes it harder to innovate, adopt modern designs, and enter higher-value or export markets.

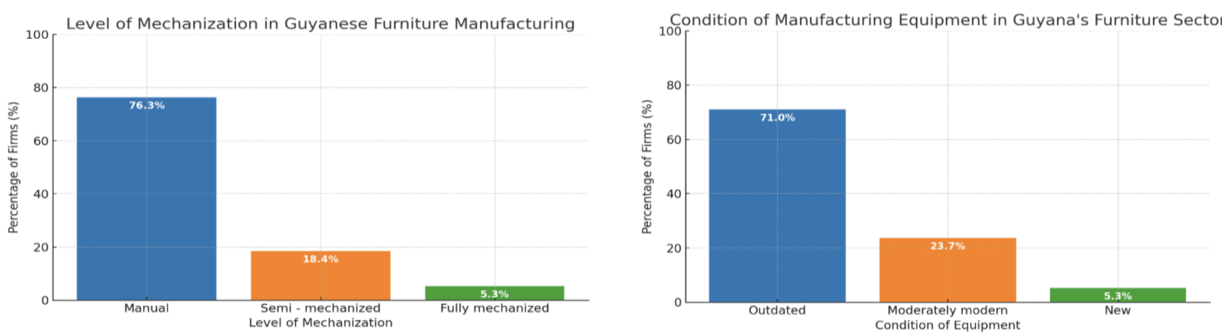

Figure 4: Level of mechanisation (left) and condition of equipment (right)

Kiln capacity and access to kiln-dried lumber

- Kiln-dried lumber usually costs about twice as much as wet (green) lumber, making it unaffordable for many furniture manufacturers. Outsourcing kiln-drying could improve efficiency, but sawmills, many of which have underused kilns, rarely offer this service.

- In 2010, the GFC, with support from the International Tropical Timber Organisation (ITTO), established kilns in Crabwood Creek (Region 6), Linden (Region 10), and Land of Plenty, Essequibo Coast (Region 2). Built by the German company Mahild, each can dry about 20 cubic metres (10,000 board feet) per day and was intended to serve small-scale sawmillers and forest communities under local Kiln Dryers Associations and Forest Products Development and Marketing Council (FPDMC) guidance. Most kilns are now non-operational, except the privatised and refurbished Essequibo facility. In 2022, the GFC issued a tender to upgrade the Linden kiln, but most GFC kilns remain poorly located relative to major furniture hubs.

- Larger manufacturers, such as Guy-America and Sommerson's Furniture, have their own kilns but face high electricity costs and limited access to graded, defect-free lumber. Some smaller manufacturers, such as Shrivattan Moulding Inc.[7], rely on imported kiln-dried timber from Brazil, including Locust, Tatabu, and Crabwood, and Locust-faced plywood.

- Demerara Timbers Limited plans to expand its Mabura sawmill with additional sawmilling and kiln-drying units, which could boost value-added capacity[8] (Jocelyn Dow, pers. comm.). However, its remote location – about 250 km (150 miles) from most furniture manufacturers – and poor road conditions limit accessibility.

2.2.4 Workforce and skills constraints

- **Labour costs and reliability**: Labour costs in Guyana remain moderate compared with other countries in the region, but rising wages are beginning to affect production costs where productivity has not kept pace. More critically, 81% of employers report problems with workforce reliability and capability. Many workers are untrained or lack the discipline needed for consistent output, leading to 4 delays, waste, and inconsistent quality. Low wages and high costs of living also push some workers to take multiple jobs, further reducing reliability.
- **Shortage of skilled workers:** About 78% of manufacturers report difficulty recruiting qualified personnel, particularly for technical positions such as CNC operators, spray finishers, skilled joiners, and production supervisors. This shortage undermines productivity, limits the adoption of modern manufacturing techniques, and constrains expansion into higher-value markets. Competition from the oil and gas and construction sectors, where wages are significantly higher, further intensifies the challenge, making it difficult for manufacturers to retain experienced staff.
- **Training and staff development**: Training institutions such as the Government Technical Institute (GTI) and other TVET providers do not adequately meet industry needs. Many programmes have moved away from foundational woodworking and joinery skills, leaving graduates underprepared for employment. The limited appeal of these programmes – only seven students enrolled in GTI's joinery programme last year – further restricts the supply of skilled workers. Structured apprenticeships and certification pathways are largely absent, and about 89% of manufacturers have no formal training or employee development programmes. Although some manufacturers are willing to take on apprentices, institutional support for such arrangements is lacking.
- **Foreign workers**: About 13% of manufacturers employ foreign workers, mainly Spanish-speaking migrants from Venezuela and Cuba, to fill labour gaps. However, language barriers and skills mismatches often constrain their effectiveness, particularly in technical or precision tasks.
- **Female participation:** Women are employed in about 13% of furniture manufacturing establishments. Traditional gender roles, the physically demanding nature of the work, and a male-dominated workplace culture, where attitudes and behaviours can make women feel excluded, contribute to their underrepresentation. In addition, many workshops lack separate restrooms, changing areas, or other facilities for women, further discouraging their participation.

[7] Shrivattan Moulding is considering investing in its own kiln to reduce reliance on imported timber (pers.comm.).
[8] https://forestry.gov.gy/2025/08/14/commissioning-of-sawmill-at-demerara-timbers-limited-mabura/

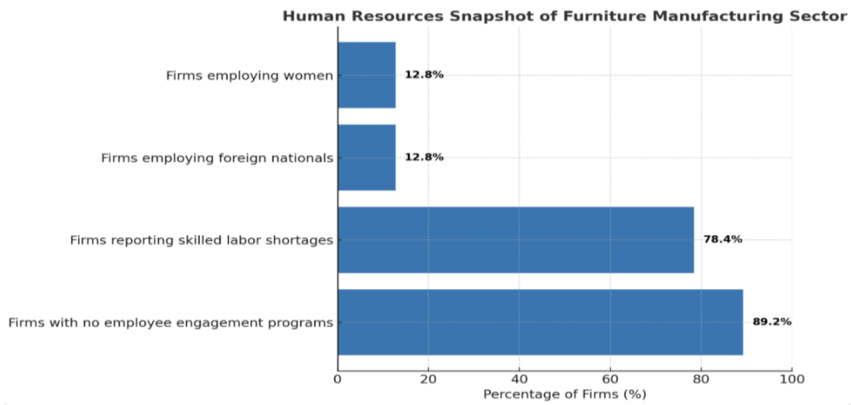

Figure 5: Workforce overview of the furniture sector

2.2.5 Domestic market

Insights from 20 buyer interviews, including project developers, retailers, construction and architecture firms, wholesalers, distributors, and private individuals, show that Guyana's furniture market is diverse but fragmented. Some buyers purchase furniture for both household and professional purposes, providing a mix of perspectives on household and institutional demand.

Domestic market overview:

The sector is primarily domestic and made-to-order. Individual buyers account for about 95% of sales, while commercial clients (27% of sales), public buyers (24%), and large retailers (16%) form smaller but important segments (Figure 6).

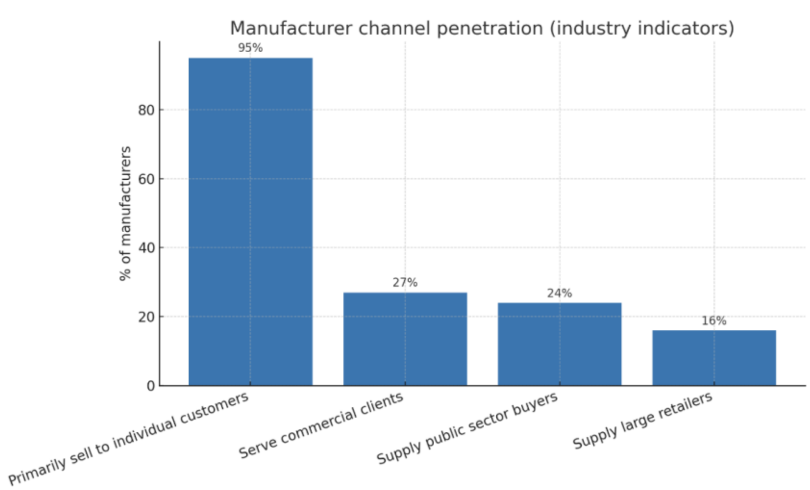

Figure 6: Manufacturer market channels

Main market channels:

- **Residential:** Homeowners, property managers, and developers buy through major retailers or commission custom work. Local furniture is preferred when quality and durability are assured. Demand peaks around holidays or life events such as moving house.

- **Commercial:** Offices and retail projects purchase both imported and local furniture. Price-sensitive buyers prefer imports, while higher-end projects favour custom, locally made products. Purchases typically coincide with project deadlines or refurbishments.
- **Hospitality:** Hotels, lodges, guest houses, and restaurants source buy local and imported furniture for openings or refurbishments. Timely delivery and reliability are critical.
- **Institutional or Public:** Ministries, schools, and hospitals procure standardised items through tenders, requiring consistent quality and volume.
- **Construction intermediated:** Contractors sourcing furniture for public and private projects prioritise timely delivery, installation support, and reliability. Small manufacturers lacking formal project experience are often excluded.
- **Export:** Exports remain small and mostly regional, limited by small production scale, inconsistent quality, and non-compliance with international standards.

Sales channels

Most manufacturers use two sales channels:

- **Direct-to-buyer:** Orders are handled case by case through referrals, social media, or site visits, with flexible pricing and delivery terms.
- **Retail chains and showrooms:** These offer product display, credit or hire-purchase options, and logistics services.

Made-to-order market

Local manufacturers are well-positioned to serve domestic, made-to-order demand. Their strengths include responsiveness, custom sizing, hardwood craftsmanship, and close buyer interaction. At the same time, the focus on bespoke production limits scalability. Uneven finishing, variable documentation, and informal operations make it difficult to meet the consistency and timing required for institutional, commercial, or export markets. Growth into these areas will require stronger operational systems, including consistent finishes, on-time delivery, efficient production, and disciplined adherence to specifications.

Demand patterns and purchasing behaviour

Demand is influenced by construction and refurbishment schedules, financial year timing, and life events. Residential demand peaks around holidays, while commercial and public orders tend to occur in batches linked to project cycles or tender awards. Contracted buyers in construction and public sectors place high value on reliability, documentation, and timely delivery, often more than on brand recognition.

Public procurement and domestic demand

Government procurement represents a substantial potential market. National budget allocations for furniture in 2023-2025 exceeded GYD 3 billion (USD 14.4 million or EUR 12.2 million), though most contracts are captured by imports or a few established local suppliers.

Local demand is also growing due to expansion in real estate, commercial and institutional construction, and school and hospital expansions and refurbishments. Yet many small manufacturers remain excluded because of market fragmentation, lack of formal business registration, limited access to finance, and competition from imports.

Survey data further show that one local supplier to the Ministry of Education uses about 55% local wood and 45% imported or non-local wood species, suggesting that material availability and quality also limit local participation in public procurement.

2.2.6 Export market

Survey results

The survey of 38 manufacturers shows that only a few are engaged in exporting, and their activity is irregular. About three-quarters (79%) report no current exports. Exporting requires paperwork, compliance documents, and coordination that many manufacturers are unable or unwilling to manage, especially those operating from residential areas. Other barriers include inconsistent product quality, limited production capacity, and uncompetitive pricing.

Among the minority that do export, shipments are mostly small and regional. About 18% of surveyed manufacturers sell to Caribbean markets, 3% to the United States, and none to the EU (Figure 7). High freight costs and the need for consistent supply further limit the export frequency and market reach.

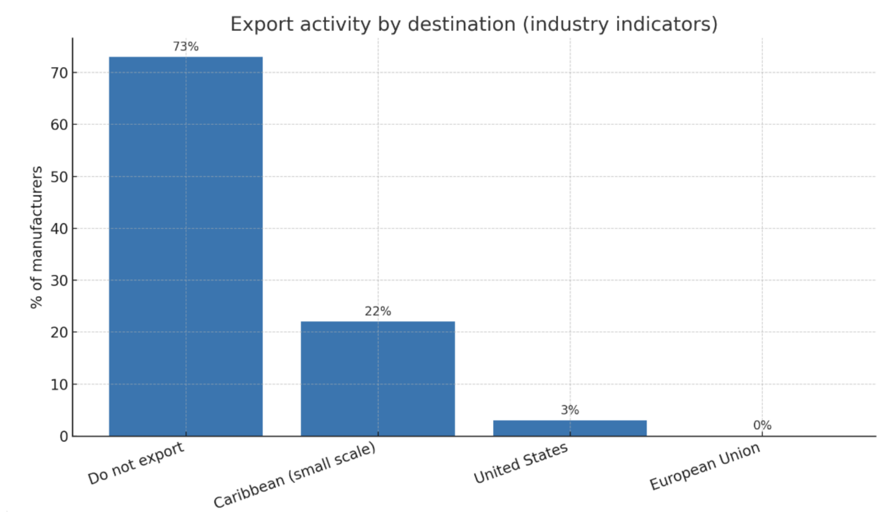

Figure 7: Export activity by destination

Trade statistics

Trade data confirm this limited export activity. According to the WITS[9] database, Guyana's total wood exports averaged about USD 54.5 million a year between 2017 and 2022, mainly to the United States and China. Other destinations included the United Kingdom, Trinidad and Tobago, Barbados, New Zealand, and the Netherlands (Figure 8). Despite these substantial timber exports, wooden furniture exports remain negligible.

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9 https://wits.worldbank.org/CountryProfile/en/Country/GUY/StartYear/2017/EndYear/2022/TradeFlow/Export/Indicator/XPRT-TRD-VL/Partner/BY-COUNTRY/Product/44-49_Wood#

Guyana exported only USD 125,850 worth of wooden furniture in 2023, an insignificant share compared with global trade or Guyana's total wood exports. Around 87% of these exports went to nearby Caribbean markets such as Antigua and Barbuda, Dominica, St. Vincent and the Grenadines, Barbados, and Trinidad and Tobago. Smaller consignments were shipped to the United Arab Emirates, the United States, and Portugal. The main export items were kitchen and bedroom furniture, seats with wooden frames, and unspecified wooden products, with kitchen furniture representing the largest share.

GFC statistics

GFC data show that between 2020 and 2024, total wooden furniture exports amounted to about 3,630 pieces valued at USD 334,000. Annual export values ranged from USD 35,500 to USD 122,500. Most were indoor furniture, averaging 440 pieces per year at USD 54,100, followed by Nibbi-branded items averaging 280 pieces valued at USD 12,200 annually.

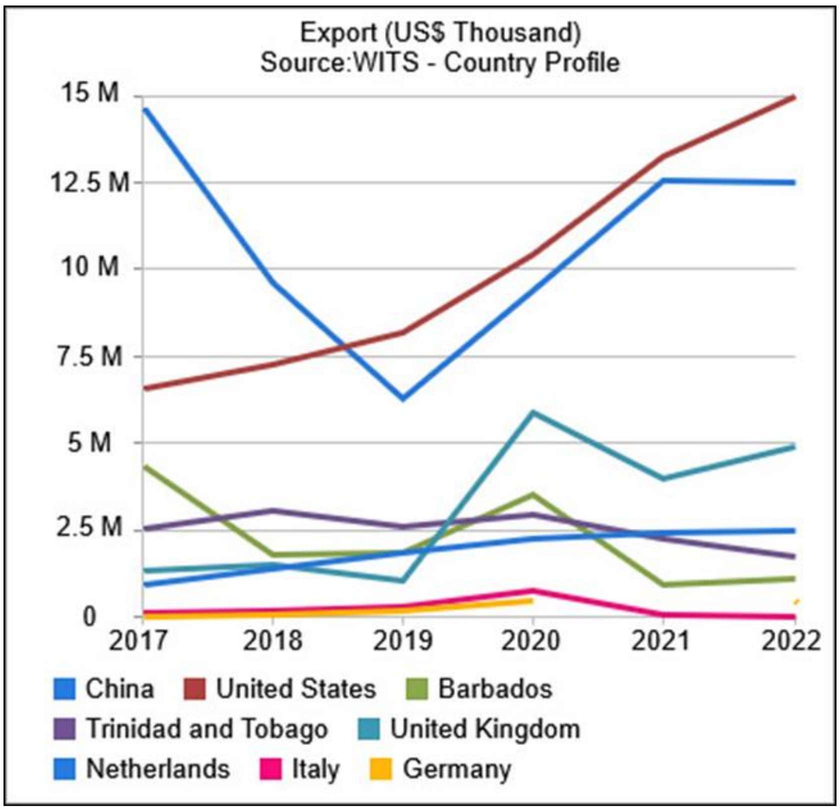

Figure 8: Guyana Export in thousand US$ for wood - all countries between 2017 and 2022 (source: WITS)

The CARICOM region accounted for nearly all exports between 2020 and mid-2025, totalling about USD 327,400. Barbados was the main destination (USD 104,400), followed by Dominica (USD 92,400) and Grenada (USD 67,700). Smaller shipments went to Antigua and Barbuda, Trinidad and Tobago, the Bahamas, the United States, the United Kingdom, Canada, and the Netherlands Antilles.

Conclusion regarding the export market

Overall, Guyana plays only a minor role in the international wooden furniture trade despite being a significant exporter of timber. This contrast between large volumes of unprocessed wood exports and minimal furniture exports highlights a major opportunity for value addition and market diversification within the sector.

2.2.7 Buyer preferences and market insights

Key purchasing factors

Across all segments, quality, durability and delivery time consistently outweigh price in importance. Buyers emphasise reliability in both product performance and delivery schedules, with price becoming decisive only when quality or timing is uncertain. Aesthetics and workmanship also strongly influence purchase decisions, while environmental considerations remain secondary but are gaining attention in some market segments.

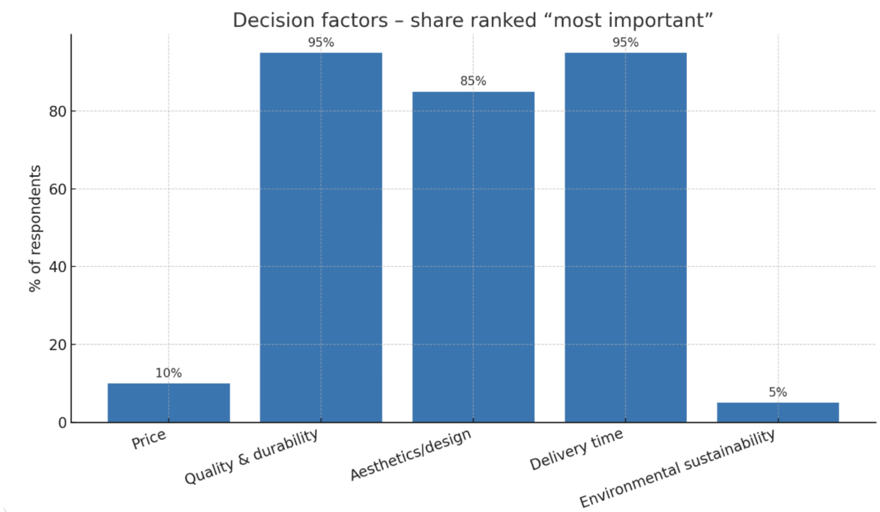

Figure 9: Decision factors – proportion of buyers ranking each as most important

Material expectations and specifications

Buyers show a clear preference for kiln-dried lumber due to its stability and consistent finish. For many, kiln-dried wood is a strict requirement, while others accept air-dried material provided expect supplier effectively manages risks of movement and warping, colour variation, and finishing defects.

Survey data indicate that 55% of buyers consider kiln-dried lumber mandatory, 50% are willing to pay a premium for reliable quality and delivery, and 95% are open to using lesser-known timber species (LKTS) if performance and finishing standards are met. Institutional and project-based clients place strong emphasis on adherence to specifications, including technical drawings, tolerances, finishing systems, and hardware quality.

Local versus imported sourcing

Buyers typically source either mainly local products or imports, with relatively few maintaining a balanced mix. Imported furniture, mainly from Asia, is mass-produced, standardised, and competitively priced, often costing less than half the price of comparable locally made products. Imports offer consistent finishes and immediate availability, though replacement lead times and after-sales service can be limiting. Local furniture, by contrast, is valued for customisation, on-site fitting, and durable hardwoods, yet quality consistency and delivery reliability remain challenges. Local manufacturers are competitive in higher-value segments where buyers are willing to pay for craftsmanship and durability, but they struggle to match low-cost imported products on price.

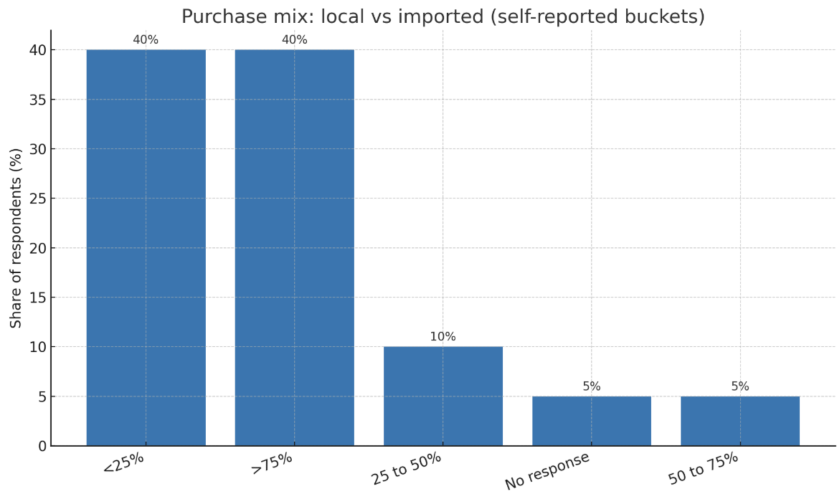

Figure 10: Purchase mix: local versus imported (self-reported)

Buyer reported challenges

When discussing challenges with local suppliers, buyers repeatedly highlight the following operational issues (Figure 11):

- **Inconsistent quality:** Mentioned most frequently; variable finishing, uneven durability, and occasional defects.
- **Unreliable delivery:** Late orders and poor communication on delays, disrupting project schedules.
- **Lack of standardisation:** Missing or incomplete technical drawings, unclear tolerances, and poor repeatability hinder reordering or matching project specifications.
- **Price:** Mentioned less frequently; most buyers accept higher prices when quality and delivery are dependable.
- **Materials and capacity:** Limited access to kiln-dried lumber and uncertainty about suppliers' ability to scale for larger or time-bound projects.
- **Communication and service:** Desire for clearer updates, proactive follow-up, and stronger after-sales support.

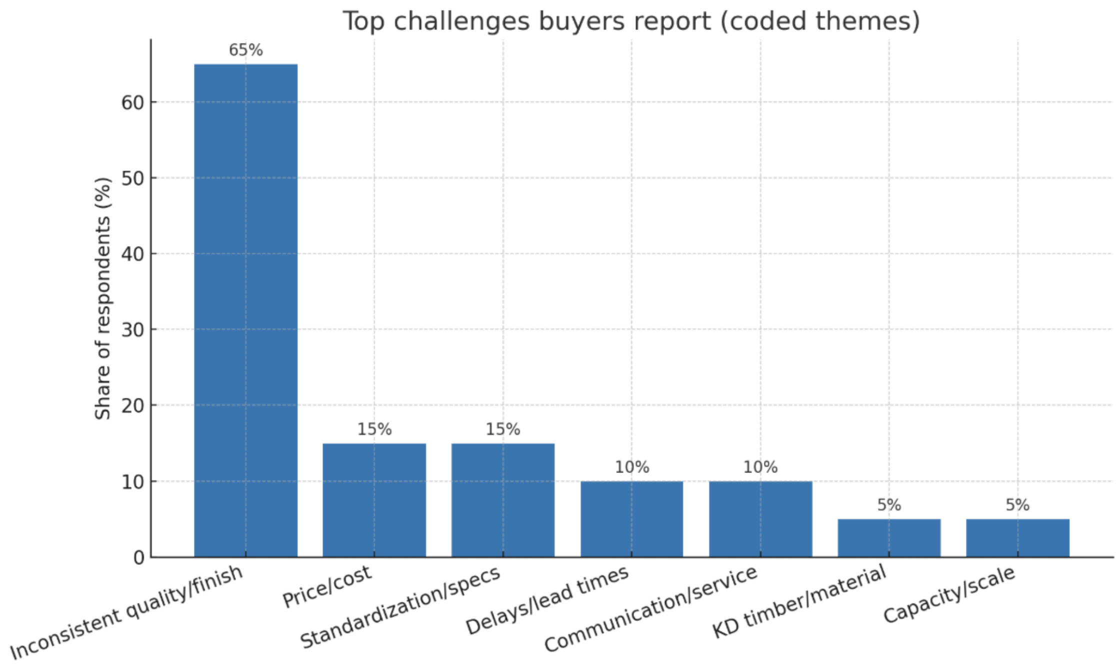

Figure 11: Pain points reported by buyers

Overall insight

Buyers overwhelmingly prioritise consistent quality and on-time delivery. Price becomes a concern primarily when these expectations are not met.

2.2.8 Business management, digital presence, and clustering

- **Business management practices**: Few furniture makers employ formal costing methods or business planning. This limits their ability to monitor profitability, make informed decisions, and ensure long-term sustainability.
- **Digital presence and marketing**: Nearly half of manufacturers (47%) have some online presence: 21% maintain a website, 37% use Facebook, and 8% are active on TikTok. E-commerce adoption is minimal, and digital marketing tools are largely unused, restricting market reach and customer engagement.

2.2.9 Clustering and infrastructure

- **Operating environments**: Around two-thirds of manufacturers operate in informal or non-industrial settings such as converted garages, backyards, or small workshops (Figure 12). Those based in residential areas are unable to upgrade equipment, scale production, or attract investment, perpetuating informality and limiting competitiveness. Around 25% of manufacturers identify land and premises as essential for growth.

- **Industrial estates**: Guyana has made progress with four established industrial estates: in Coldingen[10], Eccles[11], Belvedere[12] and Lethem[13]. The estates in Coldingen and Eccles are the most active, hosting light manufacturing, including furniture manufacturing, while Belvedere and Lethem offer modern infrastructure and incubation facilities, though their distance from major population centres limits their relevance for most furniture enterprises. Despite this, the estates remain underutilised by furniture producers, partly due to challenges reported in the land acquisition process.

- **Clustering and shared facilities**: Guyana's wood furniture industry currently lacks formal industrial clusters. Manufacturers generally operate independently, often in small workshops, with minimal coordination or shared infrastructure. This fragmentation limits economies of scale, access to services, and collective market positioning, creating inefficiencies in production and logistics, restricted access to quality inputs (e.g. kiln drying, finishing), and challenges in meeting certification, permitting, and traceability requirements. Many workshops also lack industrial utilities, compliant storage, and equipment for higher-quality finishing, constraining product quality and consistency.

  Despite these challenges, there is a strong interest among manufacturers in clustering models, particularly those offering shared infrastructure and services such as kiln drying, finishing rooms, storage, waste management, and logistics support. Clustering could also enable shared technical assistance, administrative functions, training, branding, and improved access to institutional buyers and support schemes.

  A promising example is 401 Furniture, a domestic manufacturer and retailer that partially relies on a network of small-scale producers. By supplying critical inputs – e.g. imported MDF, foam, fabric – and collaborating on designs, 401 Furniture reduces input costs and improves production consistency and quality, demonstrating the potential of coordinated production models even without physical co-location. Network-based models like this could be scaled to support micro-enterprises not yet ready to relocate, offering pooled sourcing, shared branding, and market access.

[10] The **Coldingen Industrial Estate**, established in 1997 about 15 miles east of Georgetown, spans 35 acres and hosts 36 plots averaging 20,000 square feet. Activities include furniture and wood processing, garment manufacturing, soil testing, and food and fish processing. It has a 95% occupancy rate and employs around 300 people.

[11] The **Eccles Industrial Estate**, launched in 2017 four miles south of Georgetown, covers 55 acres with 84 plots ranging from 12,000 to 35,000 square feet. With modern infrastructure and convenient access to transportation links, it supports a wide range of industries such as pharmaceuticals, chemicals, electronics, printing, and wood and furniture manufacturing. It also has a 95% occupancy rate, providing employment to about 1,500 people.

[12] The **Belvedere Industrial Estate**, developed in 2010 on the Corentyne Coast (Region 6), is equipped with an all-weather access road and a reinforced concrete bridge. It includes a business incubator managed by the Small Business Bureau (SBB) to support small enterprises. Essential infrastructure is fully in place and operational.

[13] The **Lethem Industrial Estate and Incubator Centre**, completed in 2019 in Region 9, is located near the Takutu Bridge linking Guyana and Brazil. It offers strong potential for regional trade and investment and aims to position Guyana as a gateway between Brazil's northern states and wider South American markets. It also features an incubator centre to nurture new businesses.

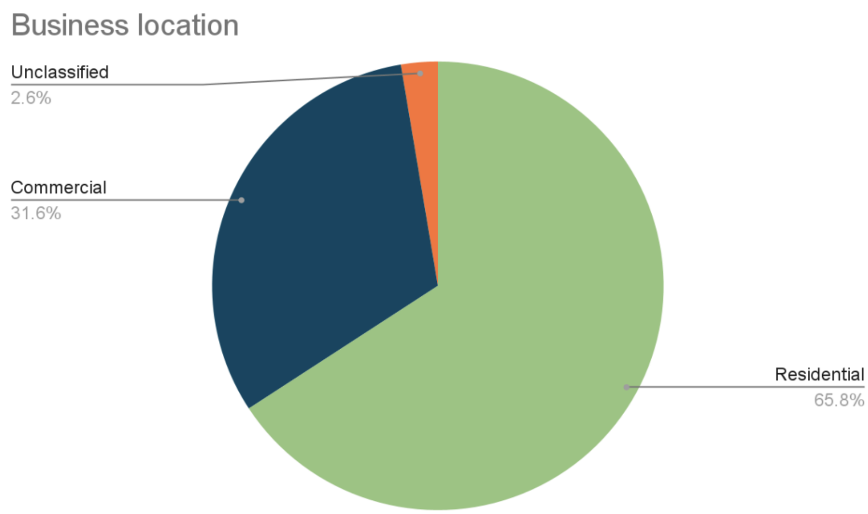

Figure 12: Manufacturing location and clustering

2.2.10 Compliance, standards, and voluntary sustainability certification

National regulations

- **Business registration**: Furniture manufacturers in Guyana must comply with general business requirements. Companies and sole proprietorships must register with the Deeds Registry or the Business Names Registry, contribute to the National Insurance Scheme (NIS) on behalf of their employees and register with the Guyana Revenue Authority (GRA) for corporate income tax, withholding tax, and value-added tax.

- **Timber legality requirements:** Furniture manufacturing in Guyana is not overseen by any dedicated authority or industry body and is not included in the Guyana Timber Legality Assurance System (GTLAS) under the Guyana–EU Voluntary Partnership Agreement (VPA). Under the EU Timber Regulation (EUTR)[14], furniture would be expected to fall within the scope of GTLAS[15], but it is currently not included. As a result, there is no oversight, production reporting, or supply chain traceability, and traceability of timber currently ends at the lumber yard or timber dealer. While GTLAS ensures that lumber is legally sourced and traceable, the exclusion of furniture limits access to markets with strict legality requirements, including the EU, the European Free Trade Association (EFTA), the United Kingdom, the United States, Australia and Japan.

  From the end of 2025[16], the EUTR will be replaced by the EU Regulation on Deforestation-free Products (EUDR), which additionally requires proof that timber products have not contributed to

[14] Similar regulations exist under the UK Timber Regulation, Japan's Clean Wood Act, Australia's Illegal Logging Prohibition Act, and the US Lacey Act, with other countries developing comparable measures.

[15] Furniture exports to the EU are currently subject to the EU Timber Regulation (EUTR) under the relevant HS codes. This applies to most of the product categories listed in **Error! Reference source not found.**, except for HS codes 4 419, 4420, 4421, 9401, and 9403 80)

[16] Enforcement of the EU Deforestation Regulation (EUDR) has been proposed to be delayed until December 30, 2026, marking a second consecutive postponement. (https://www.wri.org/insights/explain-eu-deforestation-regulation)

deforestation or forest degradation since December 2020 and that production complies with Free, Prior, and Informed Consent (FPIC) as well as International Labour Organisation (ILO) conventions.

To secure access to the EU and other key international markets and strengthen governance, supply chain traceability should be extended to the furniture sector. With its existing mandate over logging, sawmilling, and timber trade, the Guyana Forestry Commission (GFC) is well-positioned to oversee wood furniture production. Since the GTLAS already ensures compliance for lumber, extending traceability to furniture would be a practical and achievable step.

- **OHS compliance and Environmental Authorisation**: Manufacturers are required to comply with Occupational Health and Safety provisions under the Labour Act. While the Environmental Protection Act covers the harvesting and use of forest resources, it does not specifically mention furniture production[17]. Nevertheless, the 2013 Environmental Regulations under the Act require that any facility that generates noise, hazardous waste, or air emissions must obtain environmental authorisation. This means that furniture manufacturers are generally expected to secure authorisation from the EPA. In practice, few have done so. Survey data show that only 4 of 129 recorded establishments have environmental authorisation. Many operate from residential premises that do not meet zoning or environmental requirements, and most lack the administrative capacity to navigate the process. Despite this, 84 per cent of manufacturers expressed interest in receiving support to improve compliance.

Standards

- **Grading rules**: The Guyana Timber Grading Rules (2002) are intended to apply nationwide to both local and export markets, but enforcement is limited to exports. Sawmills are not required to employ certified graders or follow the grading rules for domestic sales, resulting in inconsistent quality of raw materials for manufacturers.

- **Quality standards**: Locally made furniture is not subject to formal quality standards or inspection, unlike imported products, which are overseen by the Guyana National Bureau of Standards. This lack of standardisation affects product quality, reduces consumer confidence, and limits competitiveness in both domestic and export markets.

Voluntary sustainability certification

- **Voluntary sustainability certification** in Guyana's wood furniture is still at an early stage, and no manufacturers currently use FSC- and PEFC-certified wood. Awareness of such certification is limited, and the availability of certified timber on the local market is low.

- **FSC certification**: According to the FSC certificate database, Guyana has three FSC FM/CoC certificates, including two group certificates covering approximately 528,000 ha, of which about 237,500 ha is production forest. In addition, five FSC Chain-of-Custody (CoC) certificates exist, but most certified timber is exported, with little reaching the domestic market. FSC CoC certification among sawmills is rare, and only one company operates independently of the FM/CoC certificate holders. Several FSC certificate holders are expected to transition to PEFC or adopt dual FSC–PEFC certification in the near future, partly due to FSC's strict High Conservation Value (HCV) requirements, which limit logging in

[17] Furniture manufacturing is not listed in the Fourth Schedule of the Environmental Protection Act as a sector requiring an Environmental Authorisation

Intact Forest Landscapes, which restrictions are not included in Guyana's National Forest Certification Scheme (GNFCS).

- **PEFC certification** is even less developed. Although Guyana's National Forest Certification Scheme (GNFCS) has recently been endorsed by PEFC, it has yet to gain widespread uptake. The PEFC database lists only one Chain of Custody (CoC) certified company and no forest concessions with Sustainable Forest Management (SFM) certification. Since PEFC-certified logs are not yet available locally, and FSC-certified logs are not accepted as PEFC input[18]PEFC-certified lumber is not currently on the market. The existing PEFC CoC certification appears largely strategic, positioning the company for future PEFC certification under the GNFCS or dual FSC–PEFC certification.
- **Overall, the lack of certified timber** for local use and the early stage of voluntary certification limit the furniture sector's ability to access high-value markets that require proof of sustainable sourcing.

2.2.11 Access to Finance

- Access to finance is limited for wood furniture manufacturing in Guyana. Over 60% are informal, unregistered, or operate without a business bank account, restricting their ability to access loans, grants, or equipment leasing programmes. Many also lack collateral, such as land or fixed assets, which lenders typically require.
- Even formally registered companies often struggle to meet lending criteria, including preparing business plans, financial statements, or other documentation, further limiting access to capital. Survey data highlight this challenge: 13% of respondents identified access to loans as a major concern, underscoring how capital constraints impede growth in a sector dominated by small and micro-enterprises.

2.3 Bottlenecks for scaling up value addition

Increasing value addition in Guyana's wood furniture sector requires improvements in quality, consistency, and cost-efficiency. However, several structural, operational, and market-related constraints limit the sector's ability to scale production and compete in higher-value domestic and international markets.

2.3.1 Production Scale and Capacity

- **Small enterprise size and low output**: The sector is dominated by micro-enterprises (61% with fewer than five employees) and SMEs (29%), with 60% producing less than 1,000 board feet (~2.36 m³) per month. The limited scale of operations constrains the ability to fulfil bulk orders, expand into high-value markets, or sustain exports.
- **Fragmented product focus**: Most manufacturers operate on a made-to-order basis and frequently switch products according to customer orders, limiting standardisation, workflow efficiency, and

[18] FSC FM/CoC-certified timber may be accepted by a PEFC CoC certificate holder as material from "Controlled Sources." However, to carry a PEFC label, at least 70 percent of the material in a product must be PEFC-SFM/COC certified, with the remainder coming from verified, non-controversial Controlled Sources. This option is only relevant for manufacturers of exporting furniture parts.

capacity to serve commercial, institutional, or export clients. Only a small niche (≈9%) produces higher-value, custom, or export-ready designs.

2.3.2 Raw material availability and quality

- **Limited access to quality timber**: About 64% of manufacturers report frequent unavailability of essential timbers, with only half regularly accessing kiln-dried lumber. High prices, irregular supply, and inconsistent grading affect durability and finishing.
- **Underutilisation of lesser-known timber species (LKTS)**: Market and supply constraints limit the use of alternative timbers, increasing pressure on commonly used species and restricting diversification.
- **Dependence on imported materials**: MDF, plywood, PVC, and imported pine are often costly or inaccessible for small orders. Cross-border sourcing from Suriname and Brazil remains limited.
- **Inconsistent quality and grading**: Weak enforcement of the Guyana Timber Grading Rules and lack of certified graders result in unreliable timber inputs, contributing to warping, cracking, and production waste.

2.3.3 Equipment, mechanisation, and production constraints

- **Low mechanisation**: Most manufacturers rely heavily on manual labour and hand tools, with only 27% using mechanised equipment. This limits productivity, slows production, and restricts the adoption of modern manufacturing techniques.
- **Outdated or poorly maintained machinery**: Around 53% of equipment is old or in poor condition, reducing efficiency, increasing unit costs, and constraining quality consistency. Only 5% of manufacturers use modern machinery.
- **Limited access to kilns and specialised equipment**: Many small and mid-sized workshops lack kilns, spray booths, CNC routers, compliant electrical supply, and storage facilities needed for high-quality, scalable production. Existing kilns are often non-operational or poorly located; manufacturers WITH kilns face high electricity costs and limited access to defect-free, graded timber.
- **Constraints on scaling and competitiveness:** Without shared, subsidised, or leased access to machinery and facilities, small and micro-enterprises remain trapped in low-productivity, labour-intensive operations. Expanding access to industrial space, affordable equipment, and shared facilities could strengthen efficiency, quality, and value addition.

2.3.4 Production cost and profitability

- **High production costs:** Outdated equipment, inefficient processes, unreliable and costly electricity, and low automation increase unit costs and limit scalability.
- **Manual and ageing machinery:** Heavy reliance on manual labour slows production and reduces consistency and productivity.
- **Logistics challenges:** High transport and logistics costs reduce competitiveness, especially for manufacturers outside urban centres.

- **Weak financial management:** Many producers lack structured costing and pricing systems, relying instead on informal estimates or peer comparisons.

2.3.5 Labour cost, skills, and training

- **Workforce reliability and capability**: 81% of manufacturers report untrained or unreliable workers, causing delays, waste, and errors.
- **Skills shortages**: 78% of firms struggle to recruit trained technicians in joinery, CNC operations, spray finishing, and supervision.
- **Limited training pathways**: Existing TVET programs and apprenticeships do not meet industry needs; 89% of manufacturers lack staff development initiatives.
- **Limited workforce diversity**: Only 13% employ foreign workers and 13% employ women, reducing technical capacity and inclusivity.

2.3.6 Quality of products

- **Limited design capability:** Many manufacturers lack the design skills, materials, and equipment needed to meet the aesthetic and technical standards of export, hospitality, and retail markets.
- **Non-standard production:** Inconsistent sizing, finishing, and styles make it difficult to supply institutional clients or international buyers who require standardised products.
- **Absence of quality control systems:** There is no formal mechanism for quality assurance or product certification for locally made furniture, which erodes consumer confidence, constrains competitiveness, and prevents the sector from building a reputation for consistent quality.
- **Grading rules:** Weak enforcement of grading rules undermines product quality and reduces trust in locally produced furniture, giving imported products a competitive edge.
- **Uneven regulatory oversight:** While imports are inspected by the GNBS, locally produced furniture faces little or no regulatory scrutiny, creating unfair competition and weakening consumer confidence.

2.3.7 Infrastructure and clustering

- **Inadequate workspaces:** Most manufacturers operate from residential or informal settings that lack industrial utilities, safe working conditions, storage, and space for machinery, limiting production efficiency, scalability, and quality consistency.
- **Limited industrial zones:** Only four industrial estates exist (Coldingen, Eccles, Belvedere, Lethem), many at high occupancy or poorly located relative to major markets. Without relocation to industrial zones, most producers will remain excluded from higher-standard markets and risk non-compliance with environmental regulations.
- **Fragmented production networks:** Small-scale workshops operate independently, limiting shared access to kilns, finishing facilities, storage, logistics, and technical support.
- **Constraints on investment and modernisation:** Informal or residential-based operations cannot upgrade equipment, improve workflows, or attract external investment.

- **Potential for coordinated models:** There is strong interest in clustering – both physical and network-based – that provides shared infrastructure, services, technical support, and market access. Examples like 401 Furniture show that coordinated networks can pool resources, improve quality, and secure larger or export-oriented contracts.

- **Strategic opportunity:** International experience shows that coordinated clusters with shared kilns, finishing facilities, spray booths, and warehousing help small manufacturers pool resources, improve quality, and secure larger or export-oriented contracts (DaSilva-Glasgow, 2016[19]). Realising this potential will require strategic public and private investment and policy alignment.

2.3.8 Market and competitiveness

- **High production costs / Uncompetitive pricing:** Local furniture is often more expensive than imports from China, which benefit from mechanised, large-scale production and efficient supply chains in countries such as China, Vietnam, and Malaysia.

- **Fragmented domestic market:** Small producers dominate made-to-order sales with limited capacity to meet institutional or commercial demand.

- **Weak export participation:** Only about 20% of firms export occasionally, mostly to the Caribbean. Barriers include small volumes, inconsistent quality, and high logistics costs.

- **Small-scale and inconsistent production:** Small batch sizes, limited standardisation, and frequent product switching prevent efficiency gains and make it difficult to meet larger orders.

2.3.9 Compliance with national regulations and export standards

- **Weak enforcement and compliance:** Only 4 of 129 establishments hold EPA authorisation. Occupational health, safety, and environmental compliance remain low, exposing manufacturers to regulatory risks and the risk of disputes with nearby residents.

- **Institutional oversight gap in the value-added wood sector:** Furniture manufacturing is excluded from the Guyana Timber Legality Assurance System (GTLAS), limiting traceability beyond lumber yards and restricting access to high-value, regulated export markets.

- **Export barriers:** Lack of integration into legality assurance and sustainability systems prevents entry into international markets with strict timber legality and environmental requirements.

- **Willingness to improve:** Manufacturers show readiness to comply with regulations if practical guidance, support, and capacity-building are provided.

2.3.10 Voluntary sustainability certification

- **Weak link in the supply chain**: Even when FSC-certified logs exist, the lack of CoC-certified sawmills and lumber yards means the certified status is lost before reaching local manufacturers.

- **Export preference**: Certified producers often sell to international buyers where premium prices are higher, reducing local availability.

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[19] DaSilva-Glasgow, Dianna (2016) Upgrading in the Global Furniture Value Chain - *What Possibilities for Guyana?* PhD-thesis. University of the West Indies, St. Augustine Campus, Trinidad and Tobago. 37 pp.

- **Market impact**: Scarcity of certified timber limits furniture manufacturers' access to premium export markets such as the EU, North America, Japan, and Australia, where certification is increasingly required.
- **Low local uptake**: FSC Chain of Custody certification is rare among local sawmills and lumber yards; few suppliers offer FSC- or PEFC-certified wood.
- **Strong interest**: About 84% of manufacturers express interest in support for certification, highlighting its importance for competitiveness and market access.

2.3.11 Access to finance

- Widespread informality: Over 60% of manufacturers are unregistered or lack business accounts, making them ineligible for most financing options.
- Low investment readiness: Many firms, even formal ones, lack business plans, financial statements, collateral, or reliable buyer contracts.
- Existing funding mechanisms: Several programs are available, including the Forestry Revolving Fund (GYD 900 million), Small Business Bureau Credit Guarantee Facility, Institute of Private Enterprise Development (IPED) Logging Loan, and Guyana Bank for Trade and Industry (GBTI) Grow SME financing. Some offer concessional rates of 4–6% versus market rates of 11–24%.
- Limited uptake: Despite availability, these funds are underused due to weak financial capacity among SMEs.
- Planned support: An EU-funded SME accelerator programme under the FGVC initiative is expected in Q4 2025 to improve SME investment readiness and enable scaling of value-added manufacturing for higher-value export markets.

2.4 Strengths, weaknesses, opportunities and threats

Strengths	**Weaknesses**
- High craftsmanship and use of durable hardwoods	- Small-scale, low mechanisation limits output and efficiency
- Flexibility in made-to-order production	- Limited access to kiln-dried lumber and quality raw materials
- Niche high-value/custom product capability	- Low regulatory compliance and absence of formal standards
- Strong interest in clustering and shared facilities	- Limited skilled workforce and training programmes
- Close buyer relationships in the domestic market	- High production costs; prices often >2x imports
- Some manufacturers operate private kilns	- Minimal digital marketing and e-commerce presence
Opportunities	**Threats**
- Expansion into high-value, export markets	- Competition from cheap, mass-produced imports from Asia/Central America
- Increased use of lesser-known timber species (LKTS)	- Supply chain and timber quality inconsistency
- SME financing support and investment readiness programmes	- Rising wages and labour shortages
- Clustered production and shared infrastructure	- Regulatory and environmental compliance risks
- Adoption of FSC/PEFC certification	- Institutional oversight gap in the value-added wood sector
- Growing domestic demand via real estate, hospitality, and public projects	- Price sensitivity and inconsistent buyer confidence

Conclusion and growth potential

Despite these challenges, Guyana's wood furniture sector has significant growth potential. Investments in formalisation, industrial workspaces, upgraded equipment, and workforce skills are essential. Reliable, verified materials – such as kiln-dried, graded timber – combined with improved workshop capabilities (CNC, edge banding, spray finishing, dust extraction) and hands-on training can enhance product consistency, reduce rework, and ensure timely delivery.

These improvements would enable manufacturers to move beyond small, bespoke orders toward higher-margin, repeatable production for domestic retail chains, institutional clients, and regional markets. Strengthened buyer relationships, certification, and professional marketing can allow the sector to compete on quality, reliability, and kiln-dried performance rather than price, unlocking both domestic and export opportunities.

3 Domestic market

3.1 Size of the local market

No direct data are available on the actual demand for wood furniture in Guyana's domestic market. To address this gap, furniture import data were analysed, and an estimated ratio of locally produced to imported items was applied to estimate total market demand.

3.1.1 Furniture imports into Guyana 2020-2023

Trade value

According to Importer-reported data, the value of wood furniture imports rose from USD 8.3 million in 2020 to USD 17.3 million in 2023. Exporter-reported data show a smaller increase, from USD 5.9 million to USD 11.8 million. Some shipments appear in one dataset but not the other. When the missing records are combined, the total imports are estimated to have more than doubled, from 10 million USD in 2020 to over 20 million USD in 2023.

Most of Guyana's wood furniture imports by value consisted of *general furniture* (HS-code 940360, 24% on average), *cane and similar furniture* (HS-code 940380, 24%), *doors and their frames* (HS-code 441820, 17%), and *bedroom furniture* (HS-code 940350, 14%). *Furniture parts* (HS-code 940390), *kitchen furniture* (HS-code 940340), and *office furniture* (HS-code 940330) also made a notable contribution, together accounting for 16% of total imports. Decorative and niche items, such as *woodwork* (HS-code 442090), *ornaments* (HS-code 442010) and *picture frames* (HS-code 441400), represented only 1% of the total import value (Table 3).

Table 3 also shows that most product categories experienced strong growth. Imports of *general furniture* tripled, while imports of *cane and similar furniture* and *bedroom furniture* increased by about 250%. Imports of decorative and niche products grew fivefold, while only *doors and their frames* and *windows* (HS-code 441810) remained relatively stable.

Table 3 – Value of wood furniture imports into Guyana, 2020–2023 (USD '000)

Product group	**HS Code**	**Trade Value (1000 USD)**				
		2020	**2021**	**2022**	**2023**	**Total**
General furniture	940360	1,804	4,184	4,395	5,270	15,653
Furniture of other materials, including cane, osier	940380	2,275	3,128	4,211	5,718	15,332
Doors and their frames/thresholds	441820	2,485	2,608	3,460	2,237	10,790
Bedroom furniture	940350	1,401	1,945	2,180	3,469	8,995
Furniture parts	940390	899	1,701	1,341	1,132	5,073
Kitchen furniture	940340	446	779	711	1,214	3,151
Office furniture	940330	268	712	630	660	2,271
Articles of wood	442190	243	325	741	685	1,994
Woodwork, caskets, cases and similar articles	442090	10	80	130	82	302
Tableware and kitchenware	441900	41	82	35	84	243
Seats of cane, bamboo or similar material	940150	52	34	41	56	184
Statuettes and other ornaments	442010	26	65	22	70	183
Wooden frames for paintings, photographs, mirrors, etc.	441400	5	39	6	53	104
Windows, French windows, and their frames	441810	2	10	7	2	22
Total		**9,959**	**15,693**	**17,913**	**20,731**	**64,296**

Volume

The trade value of wood furniture imports into Guyana provides a good indication of market size and demand, as well as potential opportunities for local producers to replace imports. However, to estimate local demand more accurately, the number of imported items is more informative than the value alone. Since furniture is purchased and used as individual pieces, unit counts give a clearer picture of how many households, businesses or hotels are purchasing and using them. This information is useful for assessing opportunities for import substitution and meeting domestic market needs.

In the WITS database items under Chapter 94 are recorded by unit, while those under Chapter 44 are measured by weight in kilograms. To enable comparison across categories, average product weights were applied to convert kilograms into estimated unit counts. Annex 9.3 provides detailed import data for 2020 and 2023, including both weight or unit counts (Table 17) and the average weights used for conversion.

By volume, imports were dominated by *cane and similar furniture* (29%) and *doors and frames* (19%), followed by *furniture parts* (11%) and *general furniture* (9%). In terms of number of units, *kitchen* and *office furniture*, *ornaments*, *wooden frames*, *cane seats* and *windows with frames* accounted for only a small share. Most categories recorded strong growth in unit number. Office furniture imports increased fivefold, woodwork grew more than fourfold, and wooden frames, bedroom furniture and cane seats each rose fourfold. Imports of general furniture grew by 140%, while imports of doors, kitchen furniture, furniture parts, tableware and windows remained relatively stable.

There is no data on the wood species used in the imported furniture. The majority of imported furniture consists of composite wood materials (with mixed or varied species) such as veneer, plywood and MDF. Imports from China most likely contain Poplar, Eucalyptus and Burch. Imports from the US may also include oak and pine.

Table 4 – Volume of wood furniture imports into Guyana, 2020–2023, by number of items and product category

Product group	2020	2021	2022	2023	Total
Furniture of other materials, including cane, osier	59,100	83,450	119,250	124,450	386,250
Doors and their frames/thresholds	57,850	89,750	45,000	71,500	264,100
Furniture parts	32,650	36,500	43,550	32,050	144,750
Articles of wood	17,950	35,150	32,950	44,650	130,700
General furniture	27,050	30,850	33,650	36,850	128,400
Bedroom furniture	12,000	14,800	17,750	47,150	91,750
Tableware and kitchenware	13,950	18,400	17,900	11,350	61,650
Woodwork, caskets, cases and similar articles	6,350	8,950	6,600	27,950	49,800
Kitchen furniture	2,250	20,400	2,200	2,400	27,250
Office furniture	1,750	3,900	8,000	8,350	22,050
Statuettes and other ornaments	3,150	7,300	2,650	5,150	18,200
Wooden frames for paintings, photographs, mirrors	2,150	5,800	1,250	8,750	17,950
Seats of cane, bamboo or similar material	810	320	7,740	3,160	12,030
Windows, French windows, and their frames	50	230	30	40	350

3.1.2 Estimated wood furniture demand

Trade value

Discussions with major furniture retailers, including Courts and Gafoors, indicate that in the retail market, about 40% of furniture is locally produced and 60% is imported. In contrast, the hospitality sector and public procurement rely more heavily on imported furniture, with an estimated 20% local and 80% imported share.

For this study, an overall market ratio of 30% local to 70% imported furniture was applied. To estimate the total market size, the highest annual import value from the 2020–2023 period was used as a benchmark rather than the period average.

Based on the assumption that 70% of furniture is imported, the total annual demand for wood furniture is estimated at USD 32.4 million (Table 5). The largest segments by value are furniture of other materials (USD 8.2 million), general furniture (USD 7.5 million), and bedroom furniture (USD 5.0 million), reflecting strong household and hospitality sector demand. Niche categories such as decorative items, wooden frames, and windows together account for less than 1% of total demand.

Table 5 – Estimated wood furniture demand (trade value) in Guyana (USD '000)

Product group	Highest import value (70%)	Estimated local supply (30%)	Estimated total demand
Furniture of other materials, incl. cane, osier	5,718	2,451	8,169
General furniture	5,270	2,258	7,528
Bedroom furniture	3,469	1,487	4,955
Doors and their frames/thresholds	3,460	1,483	4,943
Furniture parts	1,701	729	2,430
Kitchen furniture	1,214	520	1,734
Articles of wood	741	318	1,059
Office furniture	712	305	1,017
Woodwork, caskets, cases and similar articles	130	56	185
Tableware and kitchenware	84	36	120
Statuettes and other ornaments	70	30	100
Seats of cane, bamboo or similar material	56	24	80
Wooden frames for paintings, photographs, mirrors, etc.	53	23	76
Windows, French windows, and their frames	10	4	15
Total	**22,687**	**9,723**	**32,411**

Volume

As in the import analysis, the number of items rather than trade value was used to estimate total furniture demand. To calculate quantities, lower and upper item count ranges were derived using the highest import volumes recorded between 2020 and 2023, expressed either in units or in kilograms. Average product weights were then applied to convert weight-based data into estimated unit counts (see Annexe 9.3). Using the same indicative weights as those applied for the highest trade value estimate, total annual demand is estimated at nearly 694,000 units.

High-volume categories include furniture of other materials (178,000 units), wooden tableware/kitchenware (128,000 units), bedroom furniture (67,000 units), general furniture (64,000 units) and doors (62,000 units), as shown in Table 6. Decorative and speciality items represent only a small share of total value but account for substantial unit volumes, reflecting their lower unit prices.

Table 6 - Estimated wood furniture demand in Guyana (volume)

Product group	Highest import value (70%)	Estimated local supply (30%)	Estimated total demand
Furniture of other materials, incl. cane, osier	124,440	53,330	177,770
Tableware and kitchenware, of wood	89,730	38,460	128,190
Bedroom furniture	47,170	20,220	67,390
General furniture	44,660	19,140	63,800
Doors and their frames/thresholds	43,550	18,660	62,210
Furniture parts	36,840	15,790	52,630
Statuettes and other ornaments	27,940	11,970	39,910
Woodwork, caskets, cases and similar articles	20,400	8,740	29,140
Articles of wood	18,410	7,890	26,300
Wooden frames for paintings, photographs, mirrors, etc.	8,740	3,750	12,490
Kitchen furniture	8,370	3,590	11,960
Seats of cane, bamboo or similar material	7,740	3,320	11,060
Office furniture	7,280	3,120	10,400
Windows, French windows, and their frames	230	100	330
Total	**485,500**	**208,080**	**693,580**

3.1.3 Origin of furniture imports into Guyana

Guyana's main suppliers of wood furniture from 2020 to 2023 were China (26%), the United States (25%), Brazil (17%), Southeast Asia (12%), CARICOM (6%), and the EU-27 (3%)(Table 7). Imports from China peaked in 2021, dipped in 2022, and recovered in 2023, while shipments from the United States grew steadily, overtaking China in 2023. Southeast Asian supplies showed consistent year-on-year growth, whereas Brazil's fluctuated, peaking in 2021 and again in 2023. Imports from the EU-27 rose sharply in 2022 before declining the following year. CARICOM supplies fell in 2021 but rebounded strongly in 2023. Imports from other regions remained relatively stable but increased noticeably in 2023 (Table 7).

The combined dominance of China, Southeast Asia, and the United States, together accounting for 63% of total imports, suggests that most imported furniture is probably positioned in the low- to mid-price segments. China and Southeast Asia, in particular, maintain a strong position in these segments through low production costs, large-scale manufacturing, efficient global supply chains and established reputations in budget markets. In contrast, Guyana's producers face high labour, energy, and input costs and operate at a smaller scale, making it challenging to compete on price in the lower-end market.

Table 7 – Origin of wood furniture imports into Guyana, 2020–2023 (USD '000)

Region	Trade Value (1000 USD)				
	2020	2021	2022	2023	Total
China	2,241	5,169	4,476	4,632	16,518
United States	2,558	3,205	4,934	5,355	16,052
Brazil	1,842	3,012	2,629	3,160	10,643
SE Asia	824	1,662	2,416	3,023	7,924
CARICOM	1,221	506	652	1,377	3,757
EU-27	245	415	1,120	468	2,249
Other	1,028	1,724	1,686	2,715	7,154
Total	**9,959**	**15,693**	**17,913**	**20,731**	**64,296**

3.1.4 Conclusion regarding the size of the local market

Guyana's wood furniture market is estimated at USD 32.4 million annually, with domestic producers supplying roughly 30% of demand and imports accounting for the remaining 70%.

In value terms, imports are concentrated in a few key categories: furniture of other materials (incl. cane), general furniture, and bedroom furniture, which together represent over 60% of the total market value. In contrast, the market is more fragmented in terms of volume, comprising large volumes of lower-value wood articles, furniture parts, and decorative pieces alongside household and hotel furniture.

3.2 Domestic market opportunities

3.2.1 Rising purchasing power and market opportunities

Guyana's rapid, oil-driven growth has sharply increased purchasing power. Nominal GDP per capita rose from about USD 6,776 in 2020 to USD 20,765 in 2023, while GDP per capita at purchasing power parity jumped from USD 13,551 to USD 70,297 over the same period. Inflation has remained moderate at around 3.6% in 2025, supporting a significant increase in net purchasing power. These trends point to rising consumer spending potential, creating opportunities for sectors such as housing, furniture, and consumer goods.

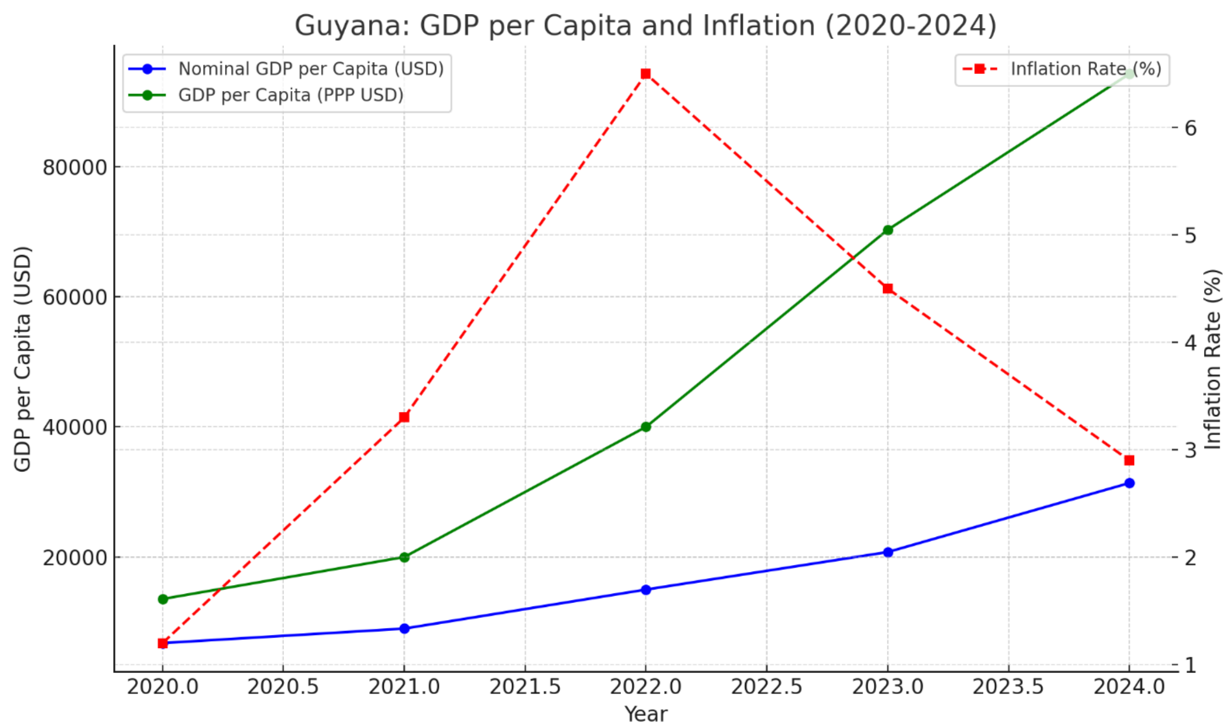


Figure 13Guyana's GDP per capita (nominal and PPP) has surged over the past five years, driven by the growing oil and gas sector, with moderate inflation signalling stable growth (source World Bank)

3.2.2 Construction boom and emerging furniture opportunities

Guyana's oil- driven growth has sparked a major construction boom, creating strong demand for furniture in homes, hotels, offices, and other commercial spaces. Public investment in infrastructure, rising private construction, and higher household incomes are reflected in several key trends: the government has allocated more than 50,000 new house lots, around 2,500 new hotel rooms are being added to the existing 1,500, and the number of offices, shops, and serviced apartments is growing steadily.

Residential developments and housing schemes

The allocation of 50,000 new house lots is creating strong demand for household furniture. Items such as beds, wardrobes, dressers, and cabinetry will be needed as people move into their new homes. Local manufacturers have an opportunity to meet much of this demand if they can produce large quantities efficiently.

Public procurement

Government spending on furniture is rising rapidly, with the Ministry of Education accounting for over half of the furniture expenditure. Public-sector furniture budgets are projected to reach approximately GYD 8.5 billion in 2025 (see Table 8 below), up from about GYD 2.9 billion in 2023. If procurement policies include local-content guidelines or preference clauses, manufacturers that meet design and quality requirements could benefit from a stable, predictable source of demand.

Table 8 - Estimate Furniture Value Budgets in the Guyana Public Sector – actual and estimated budgets for the years 2023, 2024 and 2025[20]

Total estimated furniture budget government of Guyana (G$'000)			
	2023	2024	2025
Office of the President	$ 98,174	$ 72,800	$ 196,700
Office of the Prime Minister	$ 17,150	$ 15,750	$ 52,623
Ministry of Finance	$ 36,481	$ 34,351	$ 49,992
Ministry of Foreign Affairs	$ 12,382	$ 22,673	$ 21,070
Ministry of Parliamentary Affairs	$ 1,389	$ 1,446	$ 1,577
Ministry of Local Government	$ 5,040	$ 6,405	$ 10,325
Ministry of Public Service	$ 46,886	$ 43,829	$ 47,632
Ministry of Amerindian Affairs	$ 9,619	$ 3,486	$ 3,500
Ministry of Agriculture	$ 8,925	$ 16,979	$ 18,287
Ministry of Tourism, Industry and Commerce	$ 58,935	$ 90,406	$ 91,350
Ministry of Natural Resources	$ 1,573	$ 4,007	$ 3,518
Ministry of Public Works	$ 4,900	$ 4,900	$ 7,875
Ministry of Labour	$ 12,243	$ 13,997	$ 21,000
Ministry of Human Services and Social Security	$ 19,570	$ 17,679	$ 21,000
Ministry of Education	$ 789,107	$ 387,071	$ 4,941,107
Ministry of Culture, Youth and Sports	$ 235,988	$ 258,371	$ 496,750
Ministry of Housing and Water	$ 1,258	$ 1,400	$ 1,400
Ministry of Health	$ 202,649	$ 247,617	$ 931,475
Ministry of Home Affairs	$ 218,511	$ 226,916	$ 155,950
Ministry of Legal Affairs	$ 9,970	$ 9,799	$ 16,975
Guyana Defence Force	$ 96,250	$ 140,000	$ 140,000
Other government agencies	$ 312,683	$ 380,489	$ 512,582
Regions	$ 664,254	$ 722,544	$ 791,453
Total	**$ 2,863,935**	**$ 2,722,915**	**$8,534,138**

Hotels

The hotel sector is expanding rapidly due to increased business travel, tourism, and expatriate activity linked to the oil and gas industry. According to THAG, about 2,500 new hotel rooms are under construction, in addition to the existing 1,500. Major international brands such as Marriott, Radisson, and Hyatt are driving much of this growth. Annual visitor arrivals are approaching 370,000, with a considerable share returning Guyanese, while leisure tourists make up a smaller share, around 3,000 per year.

Furnishing these new rooms will require thousands of beds, desks, chairs, dressers, wardrobes, and doors, with an estimated total value of GYD 1.4 to 4.1 billion (Table 9). There will also be additional demand for

[20] Based on project allocations and budget assumptions from Ministry of Finance documents (https://finance.gov.gy/budget-at-a-glance-2025/). Specifically, we aggregated all budget lines that include furniture and multiplied them with a percentage furniture allocation depending on the budget line (e.g. 75% for school furniture and equipment and 35% for general/office furniture and equipment). All figures should be viewed as approximations.

furniture in lobbies, restaurants, and meeting rooms. Several hotels, including Cara Lodge, Four Points by Sheraton, King's Hotel, Pegasus Suites and Grand Coastal Hotel, are increasingly interested in locally made furniture and decorative items. Items in demand include beds, side tables, chairs, panel doors and locally crafted decorative pieces. By improving quality, design, production efficiency, and reliability, local manufacturers can capture a significant share of this high-value market.

Table 9 presents estimated demand and price ranges for furniture in the hotel sector, comparing locally made and imported items. Prices for local furniture vary widely depending on product quality, craftsmanship, and material, from solid wood to composite options. Imported furniture, mainly from Asia, benefits from mass production, standardised designs, and lower unit costs, even after shipping and import fees.

Table 9 - Estimated hotel furniture demand

Item	Estimated Units	Imported Price Low (GYD)	Imported Price High (GYD)	Local Price Low (GYD)	Local Price High (GYD)	Imported Total Low (M GYD)	Imported Total High (M GYD)	Local Total Low (M GYD)	Local Total High (M GYD)
Bed	2,500	120,000	360,000	260,000	600,000	300	900	650	1,500
Desk	2,500	45,000	100,000	140,000	180,000	112.5	250	350	450
Dresser	2,500	180,000	300,000	225,000	280,000	450	750	562.5	700
Wardrobe	2,500	140,000	140,000	320,000	360,000	350	350	800	900
Panel Door	5,000	14,000	50,000	45,000	60,000	70	250	225	300
Chairs	2,500	20,000	40,000	40,000	60,000	50	100	100	150
Tables	1,000	50,000	100,000	100,000	140,000	50	100	100	140
Total		**569,000**	**1,090,000**	**1,130,000**	**1,680,000**	**1,382.5**	**2,700**	**2,787.5**	**4,140**

Commercial buildings

Growth in offices, serviced apartments, shops, and other commercial buildings is increasing demand for office furniture such as desks, chairs, meeting tables, and cabinets. This creates further opportunities for local producers to serve the growing domestic market.

3.2.3 Opportunities for import substitution

Replacing furniture imports in general

Interviews with 20 institutional and commercial buyers indicate strong potential for locally made furniture. Eight buyers already get more than 75% of their furniture from local manufacturers. These buyers are mostly real estate developers and construction or architecture companies who need close coordination, fast delivery, and customised designs. Four buyers get between 25% and 75% locally. The remaining buyers rely mostly on imports because they need standardised products, more design options, credit terms, and predictable delivery times. These buyers are mostly retailers and wholesalers, along with some developers.

This shows that local manufacturers have clear opportunities. Project-based clients prefer local suppliers when flexibility and customisation are important. With better organisation and design, local companies could also attract retail and wholesale buyers who value quality and reliability.

Despite the growing demand, many buyers are hesitant to source more furniture locally. Key reasons include inconsistent supply, long lead times, and limited design options. These challenges also point to opportunities. Local producers can improve by better planning production, offering more design options, and using modern finishing techniques to increase quality and speed.

Price is also a major factor, with low-cost Asian imports offering much lower prices that are difficult for local producers to match:

- **Beds:** Imported beds cost GYD 120,000–360,000, while local beds range from GYD 260,000–600,000.
- **Desks and wardrobes:** Local versions often cost more than twice as much as imports.
- **Dressers and panel doors:** Locally made panel doors cost GYD 45,000–60,000, compared to GYD 14,000–25,000 for imports.
- **Chairs and tables:** Local items cost GYD 40,000–140,000, while imports range from GYD 20,000–100,000.

Imported furniture is thus often cheaper, but the growing construction and hospitality sectors create steady demand for high-quality furniture that can be tailored to each project. Some local manufacturers are already meeting these needs in smaller projects.

Replacing hardwood substitutes

Even though Guyana has a rich supply of high-quality hardwoods, many furniture makers are turning to imported materials such as MDF, plywood, and pinewood. They do this for practical reasons. Imported materials are often cheaper, they offer consistent quality and dimensions, and they are easy to work with. For large orders, such as government contracts, keeping costs low and ensuring reliable supply are major considerations. One major supplier to the Ministry of Education reported that only 55% of their materials came from local sources, with the rest imported to meet demand reliability.

Local hardwoods are available, but supply chains face challenges. Grading is sometimes inconsistent, kiln drying capacity is limited, and deliveries can be delayed. Pinewood is widely used because it is easy to process and readily available, though it is less durable, weaker, and more susceptible to surface damage than local hardwoods. Pinewood prices range from GYD 550 to 750 per board foot, making it an attractive option for cost-sensitive projects.

Conclusion regarding import substitution

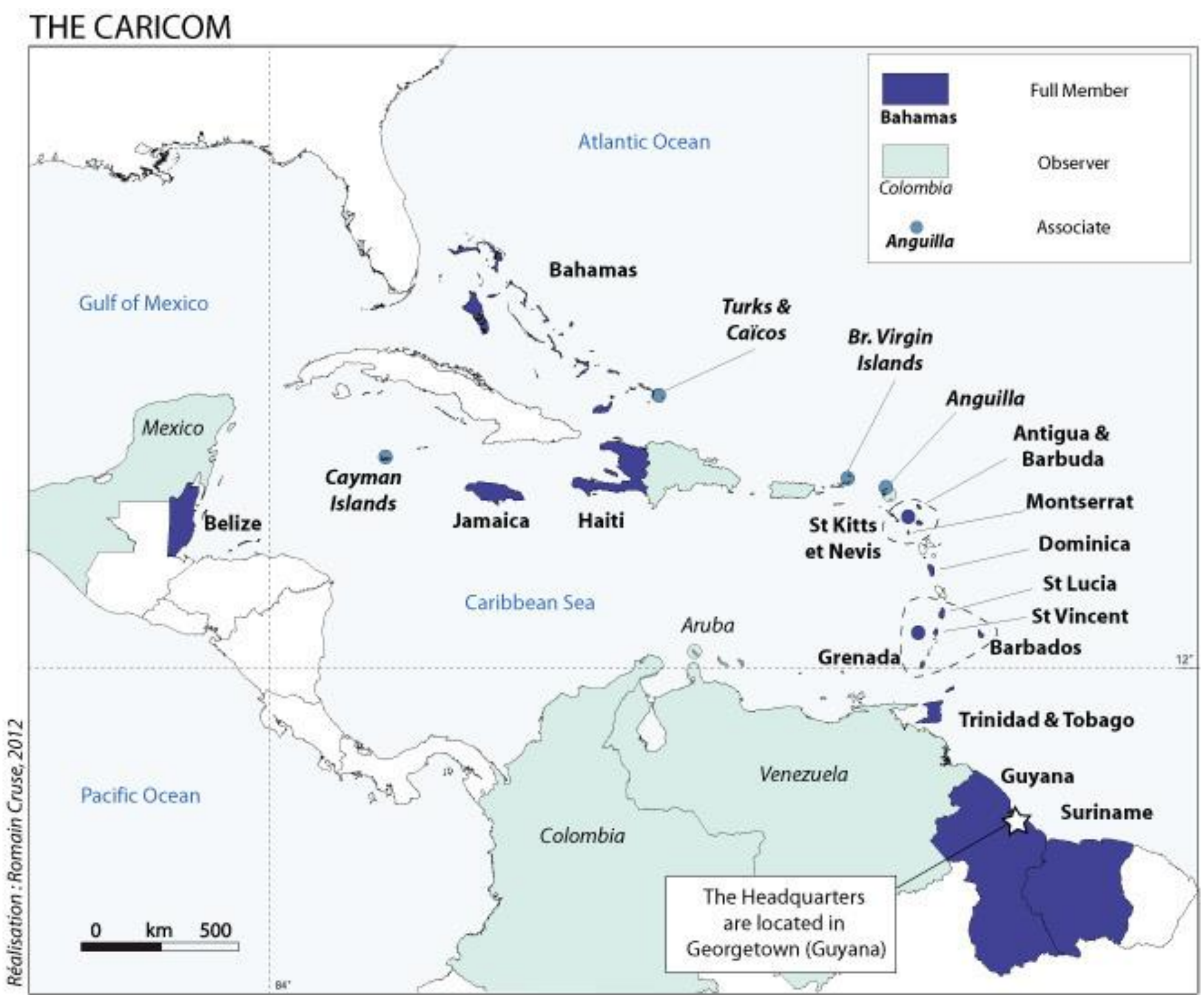
Imported substitutes currently fill much of the demand, but local hardwoods can become more competitive. Improving timber value chains. grading systems, kiln capacity, and logistics would enhance quality, variety, and sustainability while keeping production costs under control. Expanding production, collaborating on design, and strengthening relationships with buyers, especially in the public sector, could help local manufacturers capture a larger share of Guyana’s growing furniture market.

4 Caribbean market opportunities

4.1 The Caribbean region and furniture demand

The Caribbean region comprises numerous countries, overseas territories, and departments, with a total population of around 44.7 million. Belize, Guyana, Suriname and French Guiana are often considered part of the Caribbean due to their strong political and cultural ties with the region. Including these four countries brings the total population to roughly 46.8 million. About 48.5% of the population is Spanish-speaking, 27.2% French (including Haitian Creole), and 22.5% English, with the remainder speaking Dutch, Papiamento, or Dutch Creole.

The Caribbean Community (CARICOM) is a political and economic union of 15 members – 14 sovereign states and one dependency. These are Antigua and Barbuda, The Bahamas, Barbados, Belize, Dominica, Grenada, Guyana, Haiti, Jamaica, Montserrat, Saint Kitts and Nevis, Saint Lucia, Saint Vincent and the Grenadines, Suriname, and Trinidad and Tobago. Except for Haiti and Suriname, all are English-speaking. The combined population is about 19.2 million; excluding Guyana, the CARICOM market represents around 18.8 million people.



Except for Suriname and Guyana, CARICOM economies are dominated by tourism, construction, and services, with manufacturing playing a smaller role. Countries such as Jamaica, Trinidad and Tobago, Barbados and The Bahamas have higher-income tourism markets, which fuel demand for high-end hotel and resort furniture. Domestic construction and property development, particularly in tourism hubs and urban centres, result in demand for home and office furnishings. While niche manufacturing and traditional woodworking in Jamaica, Barbados and Trinidad maintain local craft traditions, most territories import the bulk of their furniture. Regional trade is supported by the CARICOM Single Market and Economy (CSME), which enables the duty-free movement of goods between member states – except for The Bahamas. Key economic sectors of the various CARICOM members and their link to furniture demand are shown in Table 10.

Table 10 - Key economic sectors & link to furniture demand (CARICOM excl. Suriname & Guyana)

Country	Key economic sectors	Connection to furniture demand
Antigua & Barbuda	Tourism, financial services, and construction	Luxury resort furniture, vacation homes
Bahamas, The	Tourism, financial services, and construction	High-end hotel, resort and luxury residential furnishing; office furniture for financial sector
Barbados	Tourism, construction, education	High-end hotel, restaurant and residential furnishing; institutional furniture
Belize	Tourism, agriculture, construction	Resort and eco-lodge furniture, residential market in tourism hubs
Dominica	Tourism (eco-based), reconstruction	Eco-lodge furniture, modest residential demand
Grenada	Tourism, agriculture, construction	Small-scale hospitality furniture, home furniture
Jamaica	Tourism, construction, manufacturing	Hotel and resort furniture, urban housing, corporate offices
Montserrat	Tourism (limited), construction	Small niche demand
Saint Kitts & Nevis	Tourism, financial services, construction	High-end resort furniture, vacation homes
Saint Lucia	Tourism, agriculture, construction	Boutique hotel furniture, small-scale residential demand
Saint Vincent & Grenadines	Tourism, agriculture, construction	Boutique hotel furniture, limited residential demand
Trinidad & Tobago	Energy, manufacturing, construction, retail	Office furniture for energy and service industries; residential furniture, hospitality sector

Furniture imports into the CARICOM region

Data on wood furniture imports into the CARICOM region over 4 years (2020–2023) was obtained from the WITS database, using both importer- and exporter-reported data. The two datasets frequently differ, with certain trade records appearing in one but missing from the other. For instance, no importer-reported data exists for Haiti or Saint Kitts and Nevis for 2020-2023; Montserrat has no 2021 data; Jamaica and Trinidad and Tobago have no data for 2023; Saint Lucia reports only up to 2020, and Saint Vincent and the Grenadines only up to 2021. On the other hand, several importer-reported records do not occur in the exporter-reported data set. To address this, both datasets were combined to close gaps on either side.

The analysis applies a broad definition of "wood furniture", drawing on categories from Harmonised System Chapters 44 (Wood and Articles of Wood) and 94 (Furniture). The specific HS product groups are listed in **Error! Reference source not found.**.

Table 11 – Wood furniture imports into CARICOM (excluding Guyana and The Bahamas), 2020–2023 (USD '000)

Product group	Trade Value (1000 USD)				
	2020	**2021**	**2022**	**2023**	**Total**
General furniture	31,796	36,734	43,978	42,492	155,000
Bedroom furniture	18,329	23,151	31,557	29,558	102,594
Doors and their frames/thresholds	21,791	24,934	25,162	29,779	101,665
Furniture of other materials, including cane, osier	15,628	13,698	20,254	17,574	67,154
Furniture parts	11,755	13,204	12,192	16,095	53,246
Kitchen furniture	7,949	10,920	14,288	14,814	47,971
Office furniture	6,659	8,595	9,295	7,965	32,514
Articles of wood	4,947	4,900	6,236	5,508	21,591
Windows and their frames	1,513	1,555	2,481	2,071	7,620
Tableware and kitchenware	627	662	2,377	2,536	6,202
Seats of cane, bamboo or similar material	905	1,287	1,583	1,008	4,783
Woodwork, caskets, cases and similar articles	644	811	1,487	1,160	4,103
Statuettes and other ornaments	953	511	653	751	2,869
Wooden frames for paintings, photographs, mirrors, etc.	341	324	602	395	1,662
Grand Total	**123,840**	**141,284**	**172,146**	**171,705**	**608,976**

Table 11 shows that total furniture imports into CARICOM (excluding Guyana and The Bahamas) grew steadily from USD 123 million in 2020 to USD 171 million in 2023. The largest shares came from "other furniture" (such as chairs, tables, cabinets, and outdoor items), bedroom furniture, and doors and their frames, each exceeding USD 100 million in the 4 years. Other significant categories include cane and similar material furniture, furniture parts, and kitchen furniture. Decorative and niche items such as tableware, ornaments, and frames make up a smaller share of imports, though some, particularly tableware, saw sharp growth between 2021 and 2023. Most categories, including doors, furniture parts, and kitchen furniture, showed steady increases, while smaller categories grew more gradually. Overall, core household furniture categories indicate strong, stable demand from both the hospitality sector and households.

Origin of furniture imports into the CARICOM region

The main suppliers of wood furniture into the CARICOM region were the US (30%), China (25%), the EU-27 (12%), Southeast Asia (9%), Brazil (7%), intra-CARICOM trade (4%), the UK (3%) and Central America (1%).

Furniture imports from the United States peaked in 2022 before dropping in 2023. China showed steady growth and surpassed the U.S. in 2023. Imports from the EU-27 rose sharply in 2022 and 2023. Southeast Asian supplies increased until 2022, then fell in 2023, while Brazil remained stable after a 2021 peak. Intra-CARICOM trade was small but consistent. UK imports declined in 2022 but rebounded in 2023. Central America supplied small volumes but saw strong growth in 2023 (Table 12).

Table 12 – Origin of wood furniture imports into CARICOM (excluding Guyana and The Bahamas), 2020–2023 (USD '000)

Region	Trade Value (1000 USD)				
	2020	2021	2022	2023	Grand Total
United States	38,130	42,835	57,704	43,621	182,291
China	27,299	36,843	43,080	47,779	155,001
EU-27	14,410	12,730	19,385	26,289	72,813
Southeast Asia	12,146	13,177	17,285	13,466	56,075
Brazil	10,561	13,309	10,550	10,946	45,366
CARICOM	5,389	5,818	6,614	6,774	24,595
United Kingdom	5,316	5,363	4,118	6,067	20,863
Central America	3,331	2,637	2,712	5,840	14,520
All other	7,258	8,573	10,698	10,924	37,453
Total	**123,840**	**141,284**	**172,146**	**171,705**	**608,976**

Intra-CARICOM furniture trade was dominated by imports from Trinidad and Tobago (3.0%), followed by Jamaica (0.5%) and Barbados (0.2%). Guyana, one of the most heavily forested countries in the region alongside Suriname, supplied just 0.2% of CARICOM's wood furniture, which is a modest share that is disappointing and highlights significant potential for scaling up exports to the CARICOM region. (Table 13).

Table 13 – Leading countries in Intra-CARICOM furniture trade, 2020–2023 (USD '000)

Country	Trade Value (1000 USD)				
	2020	2021	2022	2023	Grand Total
Trinidad and Tobago	3,909	4,578	4,766	4,771	18,024
Jamaica	453	484	1,001	1,050	2,988
Barbados	480	62	520	198	1,259
Guyana	358	283	170	278	1,089
Other CARICOM countries	189	411	158	477	1,235

Leading furniture importers among the CARICOM countries

Jamaica was the largest importer of wood furniture in CARICOM, accounting for about 34% of total imports between 2020 and 2023, with imports rising steadily. Trinidad and Tobago was the second largest (17%), followed by Antigua and Barbuda (11%), Barbados (11%), and Suriname (5%). The rest of the markets were smaller (Table 14).

Trinidad and Tobago's imports grew until 2022 but then dropped sharply in 2023. Antigua and Barbuda and Barbados also saw steady growth, while furniture imports by Grenada and St. Vincent and the Grenadines rose sharply in 2023. Suriname peaked in 2022 but fell again in 2023. Haiti has been buying less since 2021, while St. Lucia, Belize, Dominica, and St. Kitts and Nevis have had small but generally rising imports. Montserrat's imports stayed very low.

Table 14 - Wood furniture imports by CARICOM (excluding Guyana and The Bahamas), 2020–2023 (USD '000)

Country	Population	Trade Value (1000 USD)				
		2020	2021	2022	2023	Total
Jamaica	2,960,000	41,298	47,719	56,253	60,920	206,191
Trinidad & Tobago	1,350,000	24,750	27,770	31,923	17,560	102,004
Antigua & Barbuda	100,000	9,081	13,948	21,989	24,089	69,107
Barbados	290,000	12,064	14,462	20,251	20,346	67,122
Suriname	600,000	6,362	6,627	9,942	7,874	30,804
Grenada	120,000	5,064	5,235	6,145	10,582	27,026
Haiti	11,700,000	6,189	8,659	6,434	4,562	25,845
St. Vincent & the Grenadines	110,000	3,820	5,802	2,779	8,150	20,552
St. Lucia	180,000	6,109	3,013	4,877	3,982	17,981
Belize	420,000	2,726	3,065	4,125	4,539	14,456
Dominica	72,000	2,805	2,448	3,606	4,427	13,287
St. Kitts & Nevis	55,000	3,146	2,435	3,228	4,000	12,810
Montserrat	5,000	425	99	593	673	1,789
Total	**17,962,000**	**123,840**	**141,284**	**172,146**	**171,705**	**608,976**

Summary

- The CARICOM region, excluding Guyana and The Bahamas, imported about USD 609 million worth of wood furniture between 2020 and 2023.
- Major importers within CARICOM were Jamaica (34%), Trinidad and Tobago (17%), Antigua and Barbuda (11%), and Barbados (11%).
- Guyana's share of the intra-CARICOM wood furniture trade is very small, just 0.2%, despite being one of the most heavily forested countries in the region alongside Suriname.
- Most CARICOM economies rely heavily on tourism, construction, and services, driving demand for high-end hotel, resort, and residential furniture, which largely comes from imports.
- There is a strong and growing demand in CARICOM for core household and hospitality-related wood furniture, especially in key categories like general furniture, bedroom sets, and doors.
- Imports are dominated by the US, China, and the EU, with smaller contributions from Southeast Asia, Brazil, and intra-CARICOM trade.

Conclusion regarding the Caribbean market

Despite its abundant forest resources, Guyana remains a marginal supplier of wood furniture within CARICOM, accounting for only 0.2% of regional trade between 2020 and 2023. Meanwhile, CARICOM countries imported over USD 600 million in wood furniture during this period, with demand concentrated in tourism-driven markets such as Jamaica, Trinidad and Tobago, Antigua and Barbuda, and Barbados. Most of this import is met by the US, China, and the EU and not by regional producers.

This underlines both the challenge and the opportunity for Guyana. Strong demand for household and hospitality furniture, especially for hotels, resorts, and residential projects, offers clear prospects for growth. Guyana's proximity, cultural ties, and membership in the CARICOM Single Market and Economy provide natural advantages, but these have yet to translate into significant market penetration.

4.2 Potential for Guyana as a regional furniture manufacturing hub

Interviews with exporters and regional buyers indicate that Guyanese suppliers are not always perceived as cost-competitive or sufficiently reliable for schedule-bound orders. Reported issues include variable finish quality, long or uncertain lead times, and unit prices that are often above Asian benchmarks. These issues are partly structural: many Guyanese workshops rely on manual production, with limited deployment of CNC machining and standardised finishing systems that competitors (both Asian and some CARICOM producers) use to achieve uniformity at scale. In addition, robust domestic demand for furniture absorbs much of current capacity, reducing responsiveness to larger or time-bound export orders.

Guyana holds several strategic advantages that position it well to become a competitive furniture manufacturing hub within the Caribbean:

- Abundant high-value tropical hardwoods, offering raw material advantage;
- Proximity to CARICOM markets, allowing for faster and more cost-effective shipping compared to Asian suppliers;
- Duty-free access under the Revised Treaty of Chaguaramas, supporting regional trade;
- Growing potential for eco-certified products, building on existing FSC-certified concessions and the PEFC-endorsed GNFCS.

To fully capitalise on this opportunity, however, targeted interventions are needed to enhance the competitiveness of the sector. These include:

- **Focus on niche and high-end market segments**: Target hotel, resort, and luxury residential furniture markets in tourism-driven economies such as Jamaica, Barbados, and Antigua, where demand is steady and growing
- **Maximise benefits from CARICOM free trade agreement:** Reduced trade barriers, tariffs, and costs make Guyanese furniture more price-competitive against imports from outside the region.
- **Upgrading production quality** and finishing standards to meet regional buyer expectations;
- **Investing in design capabilities** and training to offer more appealing and consistent product lines;
- **Establishing branding, digital marketing, and export promotion** support, especially for small and mid-sized manufacturers;

- **Investing in voluntary sustainability certification** (e.g., PEFC, FSC) – not only FM/CoC but also CoC certification of the wood processing segment, shared services, and cooperative production models to improve scale, compliance, and efficiency among smaller producers.

With the right support, Guyana can build a value-added furniture industry that meets both regional demand and international sustainability standards.

4.2.1 Conclusion regarding Caribbean market opportunities

Guyana's furniture industry is well positioned to expand its reach within the Caribbean region. Several factors point to strong growth potential:

- **CARICOM countries continue to import large volumes of furniture** for hotels, schools, and public infrastructure. This creates a clear opening for Guyanese manufacturers, especially those using PEFC or FSC certified tropical hardwoods.
- **Preferential trade access:** Guyana's participation in CARICOM's Single Market and Economy (CSME), the EU-CARIFORUM Economic Partnership Agreement (EPA) and CARIBCAN gives local manufacturers duty-free or preferential access to regional, EU and Canadian markets.
- **Support and financing:** Export-oriented initiatives are beginning to strengthen the sector. The GNBS trained manufacturers on regional quality and safety standards, while the Caribbean Export Development Agency has provided grants totalling EUR 120,000 (GYD 38.9 million) to boost export competitiveness, including among furniture producers.

5 EU market opportunities

5.1 Global trade in wooden furniture

In 2023, global trade in wooden furniture was valued between approximately USD 78 billion and USD 94 billion, according to data sourced from the WITS database. The European Union is the largest importer, accounting for 38.5% of the total trade value, followed closely by the United States with 30.0%. Within the European Union, Germany was the leading importer, responsible for 7.2% of the total trade value, followed by France with 5.4% and the Netherlands with 3.5%. Outside of the EU and the United States, Canada was the largest importer at 3.1%, with Switzerland and Japan each accounting for 2.6% of the global trade value.

On the supply side, the European Union dominated exports with a 48% share of the global wood furniture export trade, followed by China at 26%. Tropical hardwood-exporting countries played a comparatively minor role in the global market. Vietnam was the largest exporter among these countries, contributing 7.3% of global export value, followed by Malaysia (2.1%), Indonesia (1.7%), India (0.9%), Brazil (0.7%), Thailand (0.5%), and Cambodia (0.3%). Collectively, all other tropical hardwood-producing countries - including those in Southeast Asia, West, East, and Central Africa, the Caribbean, Central America, and neighbouring South American countries - accounted for only 0.4% of global trade value. This distribution highlights the limited impact of tropical hardwood furniture on the global market.

A closer look at five key European markets - Germany, France, the Netherlands, Italy, and Belgium - which together represent 18.8% of total wooden furniture imports, reveals that most sourcing occurs within the European Union or from China. Germany, for instance, sourced 68.3% of its wooden furniture imports from within the EU, 13.5% from China, and small shares from Vietnam and India. Tropical hardwood furniture imports were negligible, with only limited imports from Indonesia, Brazil, Malaysia, and Thailand. Similar sourcing patterns exist in France, the Netherlands, Belgium, and Italy, with the vast majority of imports coming from the EU and China, and only minimal tropical hardwood imports.

In conclusion, solid wooden furniture made from tropical hardwoods currently occupies a very small, niche segment in the global market.

5.2 Analysis of high-end solid wood furniture market in Europe:

If Guyanese manufacturers can deliver stable, sustainability certified hardwood, refined craftsmanship, and align with European design sensibilities, there is a niche but growing opportunity in the high-end furniture segment; particularly with independent design studios, boutique retailers, and green-conscious buyers.

5.2.1 Material quality

European high-end buyers place exceptionally high value on the origin, appearance, and stability of timber:

- **Timber species**: There is growing interest in lesser-known tropical timber species with attractive grain, colour, and durability - especially if sustainably sourced. Guyana’s species like Crabwood, Greenheart, Kabukalli, Shibadan, and Locust can appeal if marketed correctly.

- **Moisture content**: Wood must be kiln-dried to a consistent and appropriate moisture level (typically 8–12%) to prevent warping or cracking.
- **Defects**: Buyers expect clear, defect-free timber, without knots, checks, or sapwood, on visible surfaces. Even structural parts must be stable and smoothly finished.
- **Sustainability certification**: FSC or PEFC certification is often required, especially for public procurement or retailers with green commitments.

5.2.2 Craftsmanship and design expectations

The premium market prioritises refined craftsmanship, attention to detail, and contemporary or timeless design:

- **Joinery**: Traditional joinery (like dovetails, mortise and tenon) and precise shaping to ensure high quality.
- **Finishing**: Natural oils, smooth sanding, and uniform finishes are expected. Spray coatings or hand-rubbed finishes must meet EU safety and aesthetic standards.
- **Design**: Buyers look for either Scandinavian minimalist, mid-century modern, or contemporary rustic aesthetics. Unique designs using tropical hardwoods can stand out, but must meet EU ergonomics and durability norms.
- **Customisation**: High-end buyers often prefer made-to-order or limited series products, not mass-produced items.

5.2.3 Price range

In a traditional distribution chain, the final price paid by consumers usually includes several components: the selling price or FOB (Free On Board) price, shipping and import costs, wholesaler margins, retailer margins, and value-added tax (VAT).

Figure 2: Traditional price breakdown indication for home decoration in the supply chain. Source: www.cbi.eu

Prices for wood furniture in Europe vary across market segments, ranging from low-end to high-end. After adding logistics costs, wholesaler and retail margins and VAT, European consumer prices amount to about 4-6.5 times the selling price.

Table 3 below gives an overview of the indicative prices of outdoor dining sets for 6 persons in the low-, mid- and high-end segments. These are just an indication, since prices vary depending on technique, size, material, design, brand and other ways of value addition, including sustainability concept.

Table 3: Indicative consumer prices of outdoor dining sets in Europe (Source: www.cbi.eu)

	Low-end	Mid-end	High-end
Wooden outdoor dining set for 6 persons	up to €500	€500-1,500	€1,500 or more
Rattan and bamboo outdoor dining set for 6 persons	up to €750	€750-2,000	€2,000 or more

Based on the stated multiplier (consumer prices being approx. 4–6.5 times the FOB price), estimated FOB price ranges that Guyanese manufacturers might target to remain competitive are shown in Table 4.

Table 4: Pricing adjusted to manufacturer FOB level

Segment	Consumer Price (EUR)	Estimated FOB Price (EUR)
Mid-End	500–1,500	80–375
High-End	1,500+	230–500+

For instance, an *Acacia* wood patio set (comprising a folding table with four folding chairs) sold on VidaXL (Figure 14) for €300 translates to an estimated FOB price of just €44–76 (GYD $10,700–18,500).

Figure 14 - VidaXL patio set – solid acacia wood with natural oil finish

It is highly unlikely that Guyanese manufacturers could produce a comparable set at this price point. Such a price would not even cover the cost of raw materials, hardware, labour, finishing, and basic overheads, let alone allow for profit[21]. Most local manufacturers operate on a smaller scale with higher unit costs, and similar sets produced locally typically retail well above GYD 40,000–60,000 on the domestic market,

[21] The cost of lumber suitable for outdoor furniture (such as Greenheart, Locust, Kabukalli) would already make up a large share of that amount and could easily exceed it. These species sell locally for GYD 300–600 per board foot. A set of this kind would require 20–30 board feet, putting the cost of materials alone at GYD 6,000–18,000 or more.

depending on species and craftsmanship. Achieving such low FOB prices requires mass production in low-cost manufacturing hubs, using inexpensive (plantation grown) wood, minimal finishing, and streamlined production processes; conditions that are far removed from Guyana's furniture manufacturing sector.

At the opposite end of the spectrum, a high-end FSC-certified *Teak* outdoor dining set (six chairs and a table) as sold by The Garden Furniture Centre, UK, at £1,900 (Figure 15), would, assuming similar shipping cost as in the low-end example, translate into an estimated FOB price of £320-540 (GYD 90,400–152,500). This range offers better prospects, though margins remain constrained by input costs. Kiln-dried FSC/PEFC-certified lumber – if available in Guyana – would likely cost GYD 800-1000 per board foot. For a set likely requiring 60-70 board feet (0.14–0.17 m^3), material costs alone would amount to GYD 48,000–70,000. This leaves limited margin once labour and overheads are included. For Guyana to compete in this segment, the cost of kiln-dried FSC/PEFC-certified need to come down, supported by greater availability of FSC/PEFC-certified lumber and investment in local kiln-drying capacity.

Figure 15 - The Garden Furniture Centre, West Midlands, UK - FSC® Certified teak dining set

5.3 Market entry points:

5.3.1 Retailers and distributors

The European market for furniture is segmented into low-, mid- and high-end (premium) market segments.

Low-end market

The lower end of the market aims to keep prices friendly and design simple to suit a broad pool of consumers. The focus is on functionality, especially related to how weatherproof and how easy to clean the furniture is. Consumers in this segment therefore often prefer synthetic or well-coated natural materials. Designs are generally basic to suit everybody's garden or patio. The offer usually comes in sets, to allow for a one-stop shop. Typical retailers in this segment are Castorama and JYSK. Price is key in this segment, which is largely dominated by mass-produced items. This limits opportunities for Guyanese manufacturers, especially since manufacturers have to compete with China, Vietnam and, increasingly, with European producers. The mid- and higher-end segments in furniture are more promising.

Mid-end market

In mid-market furniture, functionality and style go hand in hand. This consumer expects proper ergonomics and a contemporary look. Designs should reflect current trends communicated by magazines and mid-market brands, or align with established mid-market styles such as 'rustic' or 'romantic'. With a garden set with a contemporary look mid-market consumers can showcase their personal taste. Important players in this market are garden centres such as Intratuin, and interior stores like Habitat. As consumers like to create a coherent look, furniture is often bought as a set. In the mid-high market for furniture, price is still important, while durability and sustainability add value.

High-end / premium market

High-end furniture consumers fall into two groups. Some are independent and less influenced by marketing, choosing pieces based on personal taste and how they can 'curate' their space. They value durability, innovative design, and increasingly, sustainability, such as certified or recycled wood. Others are guided by the idea that a higher price signals better taste, and they tend to buy from high-end retailers or rely on interior decorators. Brands play a role in this segment, which can be in the form of luxury department stores such as Harrods and garden furniture retailers like Moda Furnishings.

Furniture reaches the market through traditional home decoration channels. Imports typically go through importers or wholesalers, who then supply retailers. Larger retail chains often bypass these intermediaries and import directly, and an increasing number of smaller retailers are also sourcing straight from suppliers. In some cases, buying agents are involved as well..

Importers and wholesalers

Importers and wholesalers sell products to retailers in their own country or region, or re-export them to other European markets. Some European markets are therefore supplied by wholesalers/importers from other European countries (internal European trade). Supplying buyers in the project market, such as hotels and spas, is usually a secondary distribution channel for these European importers.

These importers handle the import procedures and take ownership of the goods when buying directly from manufacturers, assuming the risk of resale. Building long-term relationships with them can lead to close cooperation on market-appropriate designs, new trends, choice of materials, finishes, and quality standards.

Importing retailers

Importing retailers vary in size, from large chains to small independent stores. Larger chains often import directly from suppliers in developing countries and many even maintain their own buying offices or production locations there. Smaller independent stores typically source their products from European wholesalers.

European retail is increasingly consolidating. Large retail brands are expanding and becoming more 'lifestyle-focused,' offering not just furniture, but also home decoration, textiles, and fashion accessories.

Buying agents, buying houses and sales agents

Ther are several types of intermediaries when working with European buyers:

- **European buying agents** represent European buyers in sourcing countries but do not import products themselves. Their role can be limited to tasks such as quality checks. They may work individually or as part of a purchasing company.
- **Buying houses** are similar to buying agents but typically offer additional services, from raw material sourcing to design and sampling.
- **European sales agents** help manufacturers connect with buyers in Europe.

Agents and buying houses mostly work on commission. They may approach manufacturers directly, or buyers may indicate that they prefer to use an intermediary. Whenever possible, it is recommended to work directly with buyers to save on commission and maintain direct communication with the buyer.

E-commerce

E-commerce has grown in recent years. It became particularly popular during the pandemic, which drove consumers to buy their home decoration products online. The best way to benefit from this is by supplying a European wholesaler or retailer with a strong online presence. For most producers, this is not a separate channel. Retailers often combine online and offline channels, but the way of supplying to them is the same. Companies that only sell online also need to take stock before they can sell.

5.3.2 Finding buyers in Europe

A typical example of an importer/wholesaler is POLSPOTTEN from the Netherlands. They develop their own product ranges in collaboration with many producers, mainly from Asia. Zara Home is a good example of an importing retailer. This Spanish chain of shops has more than 300 stores in Europe, and over 150 stores in the rest of the world. Another example of a smaller importing retail chain is the French company Caravane. They have 11 shops in France and the United Kingdom, and 2 more in Denmark and the United States of America. An importer can also be both a wholesaler and a retailer: Rivièra Maison from the Netherlands has its own shops and sells its products to other retailers as well.

*Additional considerations for market entry (*Source: *www*.cbi.eu)

- Trade fairs and online platforms: Attendance at major fairs like Ambiente (February) in Frankfurt, Maison et Objet (January and September) in Paris, IMM Cologne (January), and Spoga + gafa (June) in Cologne remains key, but manufacturers should also consider curated B2B marketplaces like Archiproducts, Novica PRO, or Ankorstore, especially for smaller-scale, artisanal brands.

- Co-branding or white-label: Offer high-end buyers exclusive co-branded lines or customised pieces that reflect current design trends such as biophilic design, nature-inspired luxury, or seamless indoor-outdoor living.
- Design Collaboration: Partner with independent European designers to co-develop collections that suit popular styles such as Scandinavian, rustic-modern, or Mediterranean.

Other European buyers, retailers & wholesalers

Skagerak by Fritz Hansen (Denmark)

- Premium outdoor and indoor solid wood furniture brand with strong sustainability credentials (FSC-certified teak, Scandinavian design).
- Target buyers: minimalist, eco-conscious European consumers.
- Could be approached via design fairs like 3 Days of Design (Copenhagen).

Diphano (Belgium)

- High-end outdoor furniture brand offering stylish dining sets in teak.
- Sells primarily through retailers and project markets (e.g. hotels, beach clubs).
- Looks for manufacturing partners in developing countries for price-quality balance.

Gloster (UK/Germany)

- Luxury outdoor furniture brand using Grade A teak.
- Manufacturing is in Indonesia, but potential for supply diversification exists.
- Products are distributed via premium retailers, architects, and interior designers.

KETTAL (Spain)

- Known for high-end customisable outdoor collections and architect collaborations.
- Requires highly tailored production and robust design capacity.

Heerenhuis (Belgium)

- Boutique wholesaler and retailer of handmade, solid wood furniture.
- Works with small-scale international producers with a focus on authenticity and quality.

Conran Shop (UK, France, South Korea)

- High-end lifestyle retailer offering a curated range of furniture, including teak and tropical hardwood items.
- Ideal for small batch, high-quality, sustainably certified products.

Low-end and mid-range stores and online retailers

Gamma, Karwei, Hubo, Praxis, and Hornbach are major DIY and home improvement retailers in the Netherlands (and Belgium, Germany), each with distinct positioning. While they are not high-end or boutique furniture stores, they could possibly offer relevant export opportunities for Guyanese manufacturers - provided the product offering aligns with their market positioning.

Gamma

Gamma is the largest DIY chain in the Netherlands, with over 160 stores. It caters mainly to price-conscious homeowners and hobbyist renovators, offering tools, building materials, paint, lighting, and seasonal garden furniture. While not focused on furniture, Gamma sells basic outdoor sets, shelving units, and storage solutions. These items are typically sold as flat-packs. Its outdoor furniture includes picnic tables made out of the African hardwood Ayous (*Triplochiton scleroxylon*), chairs and tables and lounge sets out of plantation grown *Acacia*, *Eucalyptus* and Teak.

Karwei

Karwei, part of the same Intergamma group as Gamma, targets a more style-focused segment, focusing on decorative DIY and affordable design. Its stores combine hardware with home styling, offering indoor furniture, lighting, and accessories with a modern look. Furniture is generally low to mid-range, including small tables, storage cabinets, and occasional pieces. Like Gamma, it sells garden furniture out of plantation grown *Acacia*, *Eucalyptus* and Teak.

Hubo

Hubo is a cooperative of independent hardware stores with a strong local presence. Unlike larger chains, it offers custom wood solutions and made-to-measure furniture, shelving, and cabinetry, serving both DIY and small professional customers. Hubo could be a niche buyer for semi-finished wood products or customisable furniture components, particularly when paired with reliable delivery and technical support.

Praxis

Praxis, part of the Maxeda DIY Group, is one of the leading DIY retailers in the Netherlands. It offers a wide range of home improvement products, including tools, fixtures, and seasonal garden furniture, focusing on functional and accessible items for the average consumer. Its furniture range includes simple flat-pack outdoor furniture, benches, and indoor storage solutions. Praxis typically sources through established distributors and private-label suppliers. Praxis offers a sales platform for garden furniture of VidaXL (Netherlands), Beliani (Switzerland) and Happy Garden (France).

VidaXL

VidaXL is a Dutch online retailer selling home and garden products in over 30 countries. The company offers a wide range of wood products, including furniture and garden items, sourced from various regions worldwide, such as Vietnam, China, Indonesia and European countries. Wood types include acacia, teak, pine, Douglas fir and reclaimed wood. VidaXL works with factories worldwide to produce its branded products; interested manufacturers can contact productionforvidaXL@vidaxl.com.

Beliani

Beliani is a Swiss-based online furniture retailer operating in 19 European countries. It offers stylish indoor and outdoor furniture at affordable prices by sourcing directly from manufacturers in Asia, mainly China, Vietnam, and Indonesia.. The company follows a direct-to-consumer model, selling through its own website as well as platforms such as eBay, Amazon, and over 60 partner sites (like Praxis). By importing straight from manufacturers, bypassing intermediaries, Beliani claims to offer prices up to 70% lower than traditional retail. Its wide product range includes indoor and outdoor wood furniture, some made from FSC-certified acacia and teak.

Hornbach

Hornbach is a German-owned megastore chain with several large outlets in the Netherlands. It serves both DIY consumers and professionals, offering a wide range of competitively priced items. Thanks to its scale and logistics, Hornbach could be a potential buyer for bulk, standardised wooden products, such as outdoor sets or workshop furnishings. The product range includes garden furniture as well as doors and garden gates, made from a variety of hardwoods and softwoods including acacia, pine, Douglas fir, red cedar, kempas, bangkirai, and meranti. All of these are FSC certified.

These retail chains typically sell affordable, functional, and seasonal garden and home products, often under private labels or via third-party importers and wholesalers. For Guyanese manufacturers, possible opportunities include:

- Low- to mid-priced outdoor furniture sets, small dining tables and lounge chairs
- Flat-pack or knock-down wooden furniture
- Simple storage items such as shelving units, cabinets, or modular benches
- Interior and exterior doors, as well as garden gates in various sizes
- Wooden components for home assembly or DIY use, such as stair parts, shelving planks, drawer faces.

5.3.3 Buyer interest and potential partnerships

In the low- to mid-range market, such as DIY and home improvement retailers or online stores like VidaXL and Beliani, partnerships are usually arranged through European importers, sourcing agents, or private-label suppliers rather than direct sales to retailers. For manufacturers that can produce at scale while keeping prices competitive and quality consistent, this segment offers potential for steady, high-volume sales, especially in outdoor and utility-focused products.

Producing at scale and at highly competitive prices may be difficult for Guyanese manufacturers. However, new opportunities are opening up as buyers show increasing interest in diversifying their sourcing beyond Asia and Eastern Europe, especially in response to:

- **Supply chain risks**: Geopolitical tensions are prompting buyers to look for alternative sourcing regions.
- **Storytelling & origin appeal**: Furniture from sustainably managed tropical forests, with a compelling story (e.g., local artisans, community-based production), appeals to boutique retailers and luxury designers.
- **Partnership potential**: Buyers are open to small-volume partnerships to test new suppliers. Those who demonstrate reliability may also benefit from design co-development, technical support or training.
- **Challenges**: Distance, lead times, and communication remain major hurdles. Manufacturers must meet delivery schedules, comply with EU industrial and sustainability standards, and maintain professional engagement.

Strategic partnerships

Some European buyers, retailers, and wholesalers present significant opportunities for strategic partnerships with Guyanese high-end solid wood furniture manufacturers. Examples include:

Ethnicraft (Belgium / Indonesia, Vietnam, Serbia)

As the line between indoor and outdoor spaces fades, gardens are becoming an extension of the home. One company that is cleverly tapping into this trend is Ethnicraft. Headquartered in Belgium, Ethnicraft produces furniture and decorative items at its facilities in Indonesia, Vietnam and Serbia. The company focuses on solid wood furniture sourced from responsibly managed forests and holds FSC certification.

Cane-Line **(Denmark / International)**

- Offers high-end indoor and outdoor furniture with production in Asia and Lithuania, inspired by Scandinavian design.
- Known for durable lounge and dining sets that combine teak or other tropical hardwoods with elegant minimalist forms.
- Their focus on sustainable sourcing and exclusive materials could create good opportunities for exports from Guyana.

Carl Hansen & Søn **(Denmark)**

- Iconic Danish modernist brand, known for globally admired designs such as Wishbone Chair).
- Renowned for exceptional solid wood craftsmanship and collaborations with top designers.
- While primarily focused on indoor furniture, their commitment to sustainability and quality makes them a good fit for artisan hardwood pieces from emerging markets.

Flamant **(Belgium / Western Europe)**

- High-end interior and decorative retailer and wholesaler with stores and project services across Belgium, France, Germany, and Italy.
- Offers curated furniture with a focus on premium craftsmanship, bohemian-chic style, and project-level supply for sectors like hospitality.
- An ideal channel for limited-series or tailored partnerships.

Artifort **(The Netherlands / International)**

- Premium Dutch design brand, recognised for organic shapes and high-quality craftsmanship in upholstery and solid wood furniture.
- Operates internationally in both contract and residential markets, often through design- focused retailers, galleries, and architects.
- While they manufacture in-house, their collaborative projects indicate potential interest in grass-roots sourcing custom timber elements from emerging suppliers.

5.4 Comparative analysis:

5.4.1 Guyanese furniture vs. EU market requirements

Guyanese furniture holds strong potential to capture niche segments in the EU market, particularly where buyers increasingly value storytelling, craftsmanship, and sustainable tropical hardwoods. The country's rich timber resources and tradition of small-batch, handcrafted production offer a clear competitive edge. To translate this potential into stronger market presence, manufacturers should invest in certification, design innovation, high-quality finishing, and storytelling that highlights the unique character of Guyanese wood. Strengthening alignment with legality requirements is equally important: although the GTLAS/VPA assures legally sourced and traceable lumber, its exclusion of furniture currently limits access to the EU market, where strict traceability to the source is a prerequisite for entry.

Table 15: Summary of Guyana's current range, EU requirements, gaps, and opportunities

Category	Guyanese Product Range	EU Market Requirements	Gap / Challenge	Opportunities
Materials & Timber	Abundant, legal, durable tropical hardwood; suitable for indoor and outdoor furniture.	Attractive grain, colour; durable; kiln-dried (8–12% moisture) for stability; clear, defect-free on visible surfaces; structurally sound, smoothly finished components.	Current production practices often fail to meet the consistency, finishing, and stability standards required for premium EU markets	Emphasize durability, exotic species and storytelling.
Design & Finishing	Functional, sturdy, traditional designs; inconsistent finish; limited in-house design capacity.	Modern, minimalistic, modular designs; consistent finish; precision machining; surface treatments.	Lack of contemporary design and finishing sophistication; inconsistent quality.	Develop in-house design and finishing capacity; target high-end, custom, or boutique segments.
Pricing & Competitiveness	Higher prices due to small-scale production, inefficiencies, high raw material and transport costs.	Competitive pricing; mass-produced imports from Asia at lower cost.	Price-to-value ratio often unfavourable; hard to compete with low-cost imports in mainstream segments.	Focus on niche, high-value, or custom products where uniqueness and quality justify premium pricing.
Certification & Compliance	Legal compliance of timber and lumber are guaranteed through GTLAS/VPA, but traceability of the supply chain does not include furniture making; few manufacturers with FSC/PEFC.	Traceability and legality mandatory (EUTR/EUDR) for all segments; sustainability certified wood (FSC, PEFC) preferred; low formaldehyde emissions.	Supply chain traceability ends at the lumber yard or timber dealer and excludes the furniture sector; Lack of certification limits market access.	Supply chain traceability needs to be extended to the furniture sector; obtain FSC/PEFC certification and implement quality management systems to enter EU markets;
Niche Opportunities	Unique species (live-edge slabs, outdoor hardwood furniture); small-batch and handmade products.	Interest in sustainable, handcrafted, and exotic wood furniture; storytelling and provenance valued.	Current production mostly functional; limited branding and storytelling.	Emphasize sustainability, provenance, and craftsmanship; target artisan, boutique, and high-value EU segments.

5.4.2 Recommended furniture designs for EU market success

- **Strong market opportunity:** While Guyana's tropical hardwoods are highly valued for their durability and aesthetics, success in the EU depends on more than just material strength. To compete effectively, local producers must adopt relevant design trends, improve finishing standards, and demonstrate sustainability.

- **Indoor furniture trends:** EU consumers increasingly prefer minimalist, functional designs for smaller living spaces. Scandinavian and Japandi-inspired furniture, marked by clean lines, natural finishes, and subtle elegance, is especially popular. Guyanese producers could develop hardwood dining tables, sideboards, and coffee tables using Locust, Crabwood, Greenheart, or Wamara, with lighter finishes and slimmer, contemporary profiles.
- **Outdoor furniture potential:** Guyana's naturally weather-resistant hardwoods are ideal for patio sets, loungers, and foldable garden furniture. FSC-certified wood adds appeal for sustainability-conscious European buyers. Brands like Skagerak (Denmark) and Ethnicraft (Belgium) provide strong design benchmarks for this segment.
- **Urban and compact furniture:** Multi-functional, space-saving pieces such as stackable chairs, wall-mounted desks, and flat-pack dining sets are increasingly sought after. Standardisation can improve production consistency, lower shipping costs, and enable online sales.
- **Niche opportunities:** Live-edge and reclaimed wood furniture attract design-conscious, eco-aware buyers. Small-scale children's and educational furniture are also in demand, especially when wood-based, non-toxic, and safety-compliant.
- **Export readiness requirements:** Beyond product development, manufacturers need stronger branding, eco-labels (e.g., FSC or PEFC), improved packaging, and logistics. Collaborations with European designers, finishing training, and group marketing initiatives can support market entry.
- **Strategic outlook:** With targeted improvements in design, quality, and sustainability, Guyana can position itself as a niche supplier of high-quality hardwood furniture to the EU, leveraging natural resources and creating long-term export opportunities.

5.4.3 Strategic product segments

1. **Outdoor and Garden Furniture**
   Guyanese hardwoods such as Greenheart and Locust are naturally durable and weather-resistant, making them well-suited for outdoor furniture. European consumers value longevity, comfort, and style. Suggested products include folding patio sets, loungers, benches, and modular seating. This segment leverages Guyana's material advantage and can appeal to both retail and project-based buyers.
2. **Minimalist Solid Wood Furniture**
   Scandinavian and eco-modern interior trends favour natural materials with clean lines. Coffee tables, sideboards, entryway benches, and console tables are suitable product options. Emphasis should be placed on craftsmanship, sustainable wood sourcing, and timeless design to meet EU consumer expectations.
3. **Modular and Small-Space Solutions**
   Urban living trends across Europe drive demand for multi-functional, compact furniture. Products such as folding desks, stackable stools, wall-mounted shelving, and storage benches are

recommended. Flat-pack or knock-down designs can improve logistics efficiency and lower shipping costs.

4. **Children's and Educational Furniture**
   This is a niche but growing market, with demand from schools and eco-conscious parents for safe, wooden alternatives. Suggested items include toddler tables and chairs, toy boxes, and learning towers. Compliance with EU industrial and child safety standards, as well as low-emission finishes, is essential.

5. **Artisan and Custom Furniture**
   Boutique interior and design sectors value handcrafted products that tell a story. Opportunities exist for live-edge dining tables, statement pieces, and reclaimed wood items. Key sales channels include interior designers, online marketplaces, and boutique retailers.

Key Design and Market Considerations

- **Aesthetic:** Neutral palettes, matte natural finishes, and slim profiles.
- **Functionality:** Easy assembly, modularity, and compact dimensions.
- **Certification:** FSC or PEFC certification is strongly preferred or required for retail and public procurement.
- **Packaging:** Use sustainable, recyclable materials with clear labelling and protection.
- **Marketing:** Emphasize origin, wood species, ethical sourcing, and artisanal production.

Table 16 - Benchmark Brands and Inspiration

Brand	Country	Product Focus	Relevance to Guyana
Skagerak by Fritz Hansen	Denmark	Outdoor furniture, FSC-certified teak	Premium outdoor models made from tropical hardwoods
Ethnicraft	Belgium	Minimalist solid wood furniture	Known for timeless designs using sustainably sourced wood
Tikamoon	France	Handmade hardwood furniture	Focuses on exotic species and handcrafted value
Kave Home	Spain	Indoor and outdoor furniture	Offers affordable and eco-conscious ranges
Norr11	Denmark	Japandi/Scandi interiors	Clean lines and natural materials - a high-end aesthetic
IKEA	Sweden	Affordable, flat-pack furniture	Excellent benchmark for modularity, small-space solutions, and eco-packaging
Flexa	Denmark	Children's furniture	Known for safe, modular, and sustainable wooden furniture

5.4.4 SWOT & EU market strategy

Strengths	Weaknesses
• High-quality tropical hardwoods (Crabwood, Greenheart, Purpleheart, Kabukalli, Locust) with natural durability for indoor and outdoor furniture. • Unique timber species and exotic grains that appeal to niche, high-end markets. • Potential for artisan craftsmanship and small-batch, custom furniture. • Strong narrative potential: origin story, artisanal production, community-based value chains. • Naturally weather-resistant hardwoods suited for outdoor furniture. • Opportunity to supply premium or niche segments, including tailor-made, live-edge, or limited-series items. • Legality of lumber – hence compliance with the EUTR/EUDR – is guaranteed through GTLAS/VPA	• Small-scale production and high unit costs, making it difficult to compete on price with mass producers from Asia and Eastern Europe. • Limited FSC/PEFC certification, restricting access to sustainability-focused EU buyers. • Inconsistent finishing, joinery, and production quality; kiln-drying capacity is currently insufficient. • Limited design capacity; current products often traditional, functional, and lacking contemporary EU design trends (Scandinavian, Japandi, modern rustic). • Geographic distance leads to long lead times, high shipping costs, and communication challenges. • Limited experience with EU regulations, certifications, and quality standards (EUTR, EUDR, low-emission finishes, child safety compliance, industrial standards). • Supply chain traceability currently ends at the lumber yard and does not include the furniture sector – implying furniture is currently not compliant with the EUTR

Opportunities	Challenges
• Growing EU demand for sustainably sourced tropical hardwoods in high-end furniture and outdoor segments. • Niche markets for live-edge, handcrafted, and story-driven furniture. • Partnerships with boutique retailers, independent designers, and premium project markets (hotels, offices). • Trend alignment: minimalist, modular, compact, multifunctional furniture for urban living.	• Intense competition from Asian (Vietnam, China, Indonesia, Malaysia) and European manufacturers with established supply chains and economies of scale. • High cost of kiln dried, certified timber (FSC/PEFC) and high-quality finishing may constrain margins. • Need to meet strict EU design, ergonomics, durability, safety and other industrial standards; risk of non-compliance. • Dependency on intermediaries (importers, agents, private-label suppliers) may reduce profit margins.

• E-commerce and B2B platforms for targeted niche exports. • Co-branding or design collaborations with European designers and brands. • Increasing buyer interest in diversifying sourcing away from Asia/Eastern Europe due to geopolitical risks.	• Price sensitivity in mid-range markets may make scale production difficult for Guyana. • Lead times and logistics complexity could impact reliability perception among buyers. • Limited domestic kiln-drying capacity and scarcity of FSC/PEFC-certified lumber could constrain supply.

Strategic Recommendations

- **Pilot test with 1–2 product categories** where Guyana has clear advantages - e.g., hardwood outdoor furniture and artisan live-edge tables.
- **Invest in design collaboration** with European designers to align with local market trends.
- **Adopt flat-pack/knock-down designs** and improve finishing standards to reduce shipping cost and appeal to EU logistics.
- **Strengthen FSC/PEFC certification efforts** and story-based marketing about sustainable sourcing and craftsmanship.
- **Build digital presence** (website + B2B platforms like Architonic, Alibaba, Craft Industry Alliance or even Etsy Studio) to reach niche buyers.

6 Strategic and actionable recommendations

This chapter discusses short-term and long-term recommendations and strategies that can contribute to realizing the market opportunities discussed in the previous chapters and could potentially be implemented under the framework of the EU-Guyana Forest Partnership.

6.1 Short-term (low-hanging fruit) opportunities

6.1.1 Business training and management support

A major constraint to growth in Guyana’s furniture sector is the limited managerial and operational capacity of manufacturers, particularly among small and medium-sized enterprises. Targeted, sector-specific training is urgently needed to help manufacturers scale up and meet the quality, compliance, and delivery standards expected in institutional and export markets.

The most significant gaps are in digital marketing, human resource management, production planning, costing, inventory control, accounting, occupational health and safety, and general business administration, including compliance with local regulations such as those of the EPA, GRA and NIS. These basic skills, which are also essential for accessing finance and public procurement opportunities, are already being addressed under the planned wood-based SME accelerator.

There is scope to complement the accelerator with more technical, industry-focused training on practical topics such as managing timber price fluctuations and raw material supply, improving joinery and cutting efficiency, reducing waste, understanding procurement processes, and using modern manufacturing technologies like CNC systems.

Local business development and TVET providers could play a central role in delivering this training, in partnership with industry associations and private trainers familiar with the specific needs and constraints of the sector. Tailored support, including modular training and mentoring, will be essential to strengthen the capabilities of local producers and build a more competitive, export-ready industry.

6.1.2 Curriculum modernisation for a competitive furniture industry

Guyana’s technical and vocational education and training (TVET) system is not yet fully aligned with the evolving needs of the modern furniture industry. One of the most critical gaps is the absence of training in CNC technology, a process that greatly enhances productivity, precision, and cost-efficiency. As demand grows for higher-quality, export-ready furniture, this skills gap has become a major barrier to growth.

To address this, institutions such as the GTI and regional vocational training centres should urgently update their programmes to include practical training in CNC machine operation, kiln drying, advanced joinery, and finishing. These skills are vital for reducing waste, improving quality consistency, and meeting the standards expected in institutional and export markets.

Updated training programmes should target both new entrants to the workforce and existing furniture workers seeking to upgrade their skills. A dual-track approach that combines pre-employment education with flexible, in-service training modules would help close the current skills gap and support the industry's shift toward higher value-added production.

The Technical and Vocational Training Council, which oversees institutions such as the GTI and regional centres, should lead this alignment effort to ensure that training meets both Caribbean Vocational

Qualification (CVQ) standards and evolving market needs. International experience from countries such as Jamaica[22] and Belize[23] shows that reforming TVET in close partnership with industry leads to better employment outcomes and stronger local supply chains. In Guyana, such collaboration will be key to developing a more competitive and resilient furniture manufacturing sector.

6.1.3 Enhance access to voluntary sustainability certification

Voluntary sustainability certification, such as FSC and PEFC, is becoming increasingly important for entry into high-value export markets. Yet adoption within Guyana's furniture value chain remains limited, especially among small and medium-sized producers. A coordinated national effort is needed to expand certification across the entire supply chain.

One priority is to promote group certification models for forest operators, sawmills, and micro-enterprises. By working through cooperatives or producer associations, manufacturers can share costs and reduce the administrative burden of obtaining and maintaining certification. The GFC, the Forest Products Association (FPA) and the GMSA can play a central role in facilitating and coordinating these efforts.

Investment is also needed to expand CoC certification among sawmills, timber dealers, and processors. This will ensure certified materials are tracked from forest to finished product, allowing manufacturers to make credible sustainability claims.

In addition, targeted training and advisory services should be developed to build the technical and administrative capacity of manufacturers – particularly micro and small producers – to manage certification, environmental authorisation, and other compliance requirements. Practical guidance materials and hands-on workshops would be especially useful for first-time applicants.

Greater awareness of the benefits of certification, including access to premium markets, is also required. Outreach activities and buyer linkages can help connect certified manufacturers with international demand.

Finally, Guyana can build on the recent PEFC endorsement of its national certification standards. Pilot projects, demonstration sites, and technical support for early adopters would help accelerate implementation. Multi-stakeholder partnerships involving the GFC, EPA, industry groups, NGOs, and development partners should be strengthened to align policies, pool resources, and provide coordinated support for certification.

6.1.4 Improve timber traceability to support EUDR compliance

Compliance with the EUTR and the forthcoming EUDR will require a full traceability system that covers the entire timber value chain, from forest harvesting through processing, manufacturing, and export. Currently, the GFC, under the GTLAS and VPA, oversees traceability in the timber supply chain only up to delivery at the lumber yard, leaving downstream actors such as furniture manufacturers outside the monitoring framework.

[22] https://jamaica-gleaner.com/article/art-leisure/20170618/transforming-education-through-vocational-training?utm_source=chatgpt.com
[23] https://www.ilo.org/resource/news/ilo-facilitates-stronger-partnerships-belize-improve-national-tvet-and?utm_source=chatgpt.com

The EUDR, which will replace and expand upon the EUTR by the end of 2025[24], covers all wood products, including furniture, and requires operators placing on the EU market to demonstrate that they are deforestation-free, legally produced, and fully traceable to their source. This means each stage of the value chain must maintain verifiable links to the original forest, supported by geolocation data and evidence of legality, FPIC and adherence to ratified ILO conventions.

Guyana's VPA with the EU under FLEGT, along with the GTLAS, provides a strong foundation for demonstrating legality in timber production. The VPA covers rough sawn, planed, and shaped timber, and its systems of checks and balances are independently audited to ensure credibility. Although the VPA does not currently cover furniture, it ensures that the upstream timber supply, including harvesting, is legally produced. This foundation is critical for demonstrating responsible sourcing to international buyers.

To secure continued access for Guyana's furniture sector to EU market and other environmentally and legality sensitive markets, the GTLAS should be extended to include secondary processed timber, including furniture manufacturing and sales. This would involve registering and monitoring downstream actors, implementing procedures for recording product flows, conversion rates, and ownership changes, and maintaining verifiable links to the original forest source. Expanding traceability downstream would ensure compliance with the EU regulations (both EUTR and EUDR), enhance credibility in high-value markets, and strengthen buyer confidence in Guyanese value-added wood products.

Advancing the full implementation of the VPA, including operationalizing the GTLAS and extending it to furniture production, presents a significant opportunity. Combined with PEFC certification, this approach could position Guyana as a credible supplier of legal and sustainable timber products, opening new marketing and export opportunities.

6.2 Long-term strategies for value addition

6.2.1 Skilled labour ecosystem development

A shortage of skilled labour, particularly in CNC operation, precision joinery, advanced finishing, and modern woodworking techniques, continues to limit productivity and quality in Guyana's furniture sector. Addressing this challenge requires both long-term workforce development and short-term skills support.

Updating technical and vocational curricula is an important first step, but a broader strategy is needed to create a sustainable skills ecosystem. This should include expanding access to industry- focused training, promoting careers in furniture production among youth, and forging partnerships with regional and international institutions to deliver specialised courses and train instructors. Countries such as Jamaica and Belize have achieved stronger results through similar collaborations.

To attract youth, furniture trades such as carpentry, cabinet making, and finishing should be promoted in secondary schools. Awareness campaigns highlighting career opportunities in manufacturing and construction can help improve perceptions of skilled trades.

Closer cooperation between manufacturers and training institutions is also essential. Reviving apprenticeship and work-study programmes would provide practical experience and strengthen the

[24] Enforcement of the EU Deforestation Regulation (EUDR) has been proposed to be delayed until December 30, 2026, marking a second consecutive postponement. (https://www.wri.org/insights/explain-eu-deforestation-regulation)

labour pipeline. Partnership models that combine in-company training with cost-sharing and incentives can help build long-term capacity.

In the short term, Guyana could consider selective recruitment of skilled workers through certified agencies from countries such as the Philippines, Vietnam, and Indonesia, which have strong technical training systems. This would help fill immediate gaps while domestic capacity develops.

By combining targeted international recruitment with strong local training, Guyana can build a capable workforce that supports higher productivity, better product quality, and improved competitiveness in both domestic and export markets.

6.2.2 Joint marketing platforms for sector visibility and export growth

Marketing and brand visibility remain major gaps in Guyana's furniture industry. While some manufacturers participate in local trade fairs - such as those organised by the GMSA - many still lack basic marketing tools such as product catalogues, websites, or professional photographs. This limits their ability to reach institutional buyers, regional partners, and export-oriented supply chains.

To unlock value addition and expand market access, Guyana should invest in a joint marketing and brand-building platform for the sector. This could take the form of a national digital showroom or e-commerce portal - managed by GMSA, GO-Invest, or a public-private partnership - where certified or export-ready manufacturers can showcase products, receive inquiries, and connect with buyers in Guyana, the Caribbean, and the diaspora and beyond.

Complementary support should include training in product photography, digital storytelling, branding, customer service, and social media use. Platforms such as Export Jamaica and Beltraide's Virtual Expo (Belize) provide useful models, offering visibility for small producers while reducing marketing costs through shared resources.

Regional demand for sustainably sourced, custom-designed hardwood furniture is rising, particularly among hospitality developers, returning residents, and institutional buyers. A consolidated national platform would not only raise international visibility, but also help Guyanese manufacturers to access higher-value markets and strengthen the country's image as a source of authentic, quality hardwood furniture.

6.3 Recommended policy and institutional support measures

6.3.1 Enforcement of grading standards for lumber and furniture

Guyana has established timber grading rules, managed by the GFC, and has introduced furniture quality standards through the GNBS. However, enforcement remains weak and inconsistent. As a result, many furniture manufacturers use ungraded, poorly dried, or unevenly cut timber. This leads to a cycle of poor-quality inputs and low-quality outputs. Defects such as warping, cracking, and high reject rates are common, reducing product durability, consumer confidence and export potential.

Inconsistent input quality also increases production costs and makes it harder to meet the standards required by institutional buyers and export markets. The lack of effective enforcement discourages formalisation and investment in higher-quality production.

To improve this situation, enforcement of grading standards should be strengthened through:

1. **Strengthen enforcement**: Conduct regular inspections of lumber yards and workshops by GFC and GNBS, complemented by random testing of raw materials and finished products.
2. **Link compliance to incentives**: Make meeting grading standards a requirement for public procurement or GO-Invest incentives, with payments linked to proof of material quality (e.g., stamped or barcoded lumber).
3. **Build capacity**: Provide training and technical guidance to sawmills and small manufacturers on grading procedures and quality assurance.
4. **Integrate standards into policy**: Embed grading and quality standards in public procurement frameworks to encourage consistent adoption across the sector.

Effective enforcement and capacity-building will create stronger incentives for compliance, improve product reliability, and enhance the competitiveness of Guyana's furniture industry in both domestic and export markets.

6.3.2 Extension of industrial zones

Most furniture manufacturers in Guyana operate from residential or informal premises, limiting their ability to scale production, comply with regulations, meet safety standards, and access modern equipment. The situation limits productivity, hinders collaboration, and constrains the sector's ability to serve institutional or export markets.

To improve this situation, it is recommended to:

1. **Expand the number of industrial zones**: Establish zones through public-private partnerships near major transport routes to support furniture production at scale.
2. **Provide shared infrastructure**: Include kiln drying and seasoning facilities, modern machinery (CNC routers, panel saws), finishing booths, quality control labs, centralised warehousing, showrooms and training hubs.
3. **Target formal, compliant producers**: Give priority access to registered producers that meet GRA, NIS, and EPA requirements, and are prepared to serve institutional and export markets.
4. **Use incentives to encourage participation**: Offer tax breaks, low-interest financing, or subsidised leases to attract participation.

Over time, this can help transform the sector from informal cottage operations into an integrated, export-ready industry that supports broader economic diversification.

6.3.3 Local procurement reforms to strengthen domestic furniture manufacturing

Public procurement for schools, hospitals, and government offices can play a key role in strengthening Guyana's furniture industry. Yet, many contracts still go to imported products due to lower prices or concerns about quality and delivery.

To improve this situation, it is recommended to:

1. **Introduce phased local content requirements**: Require that at least 50% of publicly procured furniture be sourced from registered, compliant local manufacturers, with a 12-month transition period to allow upgrades in production, quality, delivery and registration with GRA, NIS and EPA.
2. **Pre-qualify local suppliers:** Each public agency should maintain a list of at least two approved local suppliers per product category. Imported products should only be allowed if local suppliers cannot meet specifications or delivery timelines.
3. **Extend to hospitality projects:** Encourage foreign-owned hotels and other large developments to source at least 20% of their furniture locally, providing six months' notice to allow manufacturers time to plan production.
4. **Support coordination and monitoring**: Ensure agencies coordinate procurement planning, monitor compliance, and provide guidance to help manufacturers meet quality and delivery standards.

These measures can leverage Guyana's construction and development boom to create a more competitive, resilient, and job-creating local furniture sector.

6.3.4 Institutional coordination and governance reform

The development of Guyana's furniture sector is currently constrained by fragmented responsibilities across government agencies. The GFC manages raw material supply, the GNBS oversees quality standards, GO-Invest leads export promotion, the Ministry of Education handles school procurement, the Ministry of Tourism, Industry and Commerce (MINTIC) supports industrial development and industrial estates, and the Ministry of Labour is responsible for skills training. This fragmentation limits strategic planning and slows implementation.

To improve this situation, it is recommended to consider extending or clarifying the mandate of the Guyana Forestry Commission, in coordination with the Environmental Protection Agency, to include systematic data collection and traceability for furniture and other value-added wood products. In addition, the creation an inter-agency furniture task force could be explored to align efforts across raw material supply, compliance, training, certification, marketing, and exports. Its core functions should include:

1. **Coordinate support programmes**: Ensure public and private initiatives are harmonized to maximize impact on manufacturers.
2. **Promote marketing and export facilitation**: Lead joint marketing campaigns and export promotion to strengthen market access
3. **Improve sector data and monitoring**: Publish information on prices, market trends, and supplier directories, and track standards, certification uptake, and procurement performance.
4. **Support industrial clustering and zones**: Facilitate the development of industrial estates and clustering initiatives to improve efficiency and competitiveness.

5. **Update policy frameworks**: Encourage compliant sourcing, certification, and collaborative export strategies to enhance sector resilience.

Stronger governance and institutional coordination will help Guyana scale up its furniture sector, attract investment, and compete effectively in international markets.

6.3.5 Environmental management and regulatory considerations

Furniture manufacturing and other value-added wood processing activities are subject to environmental management and permitting requirements under the Environmental Protection Act (Cap. 20:05). The Environmental Protection Agency (EPA), including through its Forestry Department and in coordination with the Guyana Forestry Commission, plays an active role in authorising, monitoring, and supporting compliance in the sector. While a significant share of furniture operations currently operate informally and outside zoned industrial areas, eligibility for Environmental Authorisation is determined through the formal application and assessment process, and the EPA provides guidance and enforcement to support regularisation where feasible.

Environmental considerations are therefore not separate from sector development, but an integral enabling condition for scaling value-added manufacturing. Priority issues include efficient use of raw materials, control of dust and air emissions, waste segregation and recycling, noise and occupational health and safety, and pollution prevention in finishing operations. These considerations reinforce the rationale for shared infrastructure, such as kiln drying facilities and furniture manufacturing clusters, where compliant dust extraction, finishing rooms, waste management systems, and safe working conditions can be provided collectively and cost-effectively.

7 Investment opportunities

The growth of Guyana's furniture industry hinges on targeted investments that enhance value addition, boost competitiveness, and connect manufacturers to higher-value markets. In this context, the EU Forest Governance and Value Chains Programme (FGVC) as a key mechanism for implementing the Forest Partnership between Guyana and the EU and implemented by FAO, offers support through its wood-based SME accelerator and small-grants scheme, leveraging investment in value added manufacturing. Complementing these efforts, the ongoing development of a national sawmilling curriculum is expected to improve the quality and consistency of timber products supplied by sawmills. Building on these foundations, there is significant potential to attract larger-scale investment from government, private investors, and development finance institutions (DFIs) to address structural bottlenecks and expand the sector into regional and overseas markets. Recommended areas for investment that could accelerate the EU-Guyana Forest Partnership objectives include:

A. Independent kiln drying facilities
B. Furniture manufacturing cluster zones
   Initiatives to strengthen market linkages, such as branding, marketing, and partnerships with EU retailers

7.1 Independent kiln drying facilities

7.1.1 Rationale

Kiln drying is one of the weakest links in Guyana's wood products value chain and a critical constraint on the competitiveness of the domestic furniture industry. Proper drying improves the dimensional stability, durability, machining accuracy, and finishing quality of lumber. These characteristics are essential for supplying the hospitality sector, public procurement, higher-end domestic consumers, and export markets, particularly in the Caribbean and the European Union.

Although demand for kiln-dried lumber is strong, access remains limited. Many furniture manufacturers cannot obtain kiln-dried, graded timber in sufficient quantities or at predictable quality. Existing kilns are either privately owned and used in-house, non-operational, poorly located relative to furniture manufacturing hubs, or oriented toward sawmill production rather than service provision. As a result, manufacturers either rely on green lumber (leading to waste, defects, and reputational damage) or substitute local hardwoods with imported materials such as MDF, plywood, and pine.

This gap creates a strong opportunity for independent, commercially operated kiln drying facilities serving manufacturers nationwide. Such businesses can either provide kiln drying services for a fee or sell kiln dried lumber at a premium price, while at the same time supporting higher-quality processing and value addition in the value chain.

7.1.2 Market demand and sector trends

Demand for high-quality furniture is rising across Guyana driven by the construction boom, expanding hospitality sector, and increasing public procurement. At the same time, supplies of traditional timbers such as Locust and Crabwood are tightening due to sustainability considerations and selective harvesting practices. Furniture manufacturers are therefore increasingly willing to use lesser-known timber species (LKTS), provided these are properly dried, stable, and consistent.

Kiln drying is essential for making these alternative species (such as Darina, Wamara, Kabukalli nd light and medium-density hardwoods) fit for furniture production. Effective drying reduces moisture content to 8–12 percent, minimises warping and cracking, limits fungal staining and mould, and improves finishing performance. Without kiln drying, these species remain underutilised despite their technical suitability and availability.

Indicative local price differentials illustrate the value created by kiln drying (per board foot measure):

- **Darina:** GYD 250 (green/wet) → GYD 500-550 (kiln-dried)
- **Locust:** GYD 400 (green/wet) → GYD 900-1,000 (kiln-dried)

Average drying cost are estimated at around GYD 40 per board foot, allowing attractive markups for kiln operators while still being affordable to mid-sized manufacturers.

Technology and facility scale options

For Guyana's conditions, dehumidification kilns are the most appropriate technology. They are energy-efficient, well suited to mixed tropical hardwood species, and tolerant of variable moisture content. Conventional hot-air systems that work with boilers could be cost-effective at scale but require robust heat infrastructure and high energy input. Vacuum kilns are another option and have faster drying results, but high capex requirements and more complex maintenance.

Dehumidification kilns were therefore chosen as the technology for this business case. A standard commercial unit with a 15,000 board foot (≈35 m³) capacity per cycle is considered an optimal entry-level scale. Potential suppliers of DH kilns include Nyle Dry Kilns, Wood-Mizer and Ebac Indsutrial Products.

Key parameters for such a facility include:

- **Drying cycle**: 14–21 days, depending on species and initial moisture content
- **Annual cycles**: approximately 17 under conservative utilization assumptions
- **Annual throughput**: approximately 255,000 board feet (can serve at least 10-15 commercial manufacturers)
- **Labour assumption**: 1 skilled operator (13,000 GYD / day) for 20 days/month and 2 unskilled workers (GYD 7000 / day) for 6 days per cycle.

The estimated capital investment for a 15,000 board foot dehumidification kiln is **GYD 25 million**, including the kiln unit, control systems, installation, electrical works, basic material-handling equipment, and commissioning. This estimate is conservative and aligned with comparable installations in the Caribbean and northern South America.

Over time, facilities can be scaled up through additional kiln chambers or complemented by hybrid solar–dehumidification systems, which can reduce energy costs by 20–30 percent and align well with Guyana's climate and EU Forest Partnership climate-finance priorities.

7.1.3 Business Models

Two commercially viable models are suitable for Guyana's market conditions and can be considered:

1. Drying-as-a-Service

Under this model, the kiln operator provides drying services to furniture manufacturers, sawmills, and timber traders, charging a fee per board foot dried. This approach is well suited to clusters of small and micro-enterprises that cannot finance or operate their own kilns.

Indicative financials:

- Drying fee: GYD 100 per board foot
- Annual sales volume: 255,000 board feet
- Annual revenue: GYD 25.5 million
- Average drying cost: GYD 49 per board foot
- Gross margin: GYD 51 per board foot
- Annual operating profit: 255,000 × 51 ≈ GYD 13.0 million/year
- Indicative capex payback period: ~2 years (25 million / operating profit)

This model offers relatively low risk, predictable cash flow, and strong demand from domestic manufacturers.

2. <u>Buy–Dry–Sell</u>

In this model, the kiln operator purchases green lumber from sawmills or lumber yards, dries it, and resells it as kiln-dried lumber. This model gives greater control over quality, stock management and species selection, especially with lesser-used timbers .

Indicative financials:

- Purchase price (green): GYD 250 per board foot
- Drying and handling cost: GYD 49 per board foot (see box above)
- Total cost (ex-transport): GYD 299 per board foot
- Sale price (kiln-dried): GYD 450–550 per board foot *(conservative base case uses GYD 450)*
- Gross margin per board foot: GYD 450 – 299 = GYD 151 per board foot
- Annual operating profit: 255,000 bf x GYD 151 ≈GYD 38.5 million/year

From this, additional costs specific to the buy–dry–sell model must be considered, including:

- Additional working capital financing costs (inventory holding, receivables)
- Higher logistics and marketing costs
- Increased risk of price fluctuation and slow-moving stock

Assuming a conservative GYD 6–8 million per year for these incremental costs:

- Indicative net operating profit: GYD 30–32 million per year

Comparative insight (Drying as a service vs buy–dry–sell)

- Drying-as-a-Service:
  - Lower risk
  - Lower working capital requirement
  - Steadier, more predictable cash flow
  - Indicative annual profit: ~GYD 13 million
- Buy–Dry–Sell:
  - Higher gross margins and profits

- Requires disciplined procurement, inventory control, and market access
- Indicative annual profit: ~GYD 30–32 million
- Best suited to experienced operators or those linked to furniture clusters, wholesalers, or export projects

7.1.4 Location and demand aggregation

Independent kiln facilities are most viable when located close to concentrations of furniture manufacturers and timber traders. Priority locations include:

- **Region 4 (Greater Georgetown / East Bank / Parika)** – largest concentration of furniture manufacturers and traders
- **Region 10 (Linden)** – proximity to forest resources and sawmills
- **Region 6 (Berbice)** – growing construction demand and limited existing kiln access

Rather than a single national facility, a phased approach involving *two to three strategically located kilns* would better match demand, reduce transport costs, and spread operational risk.

7.1.5 Strategic advantage: quality assurance and traceability

Mislabelled or poorly dried lumber is a common complaint among furniture manufacturers and buyers. Independent kiln operators can differentiate themselves by providing **verified kiln-drying services**, including:

- Species-specific drying schedules
- Moisture content testing and documentation
- Batch traceability and drying certificates

Such services would reduce waste for manufacturers, improve acceptance rates in institutional and export markets, and support future compliance with the EU Regulation on Deforestation-free Products (EUDR). Collaboration with the Guyana Forestry Commission could further align kiln operations with national traceability systems.

7.1.6 Development Impact and Investment Rationale

Independent kiln drying facilities represent a commercially sound and high-impact investment. Base-case payback periods are estimated at 1.5–2.5 years, depending on utilisation and business model, making the investment attractive to private investors.

For first movers, investment risk could be reduced through:

- Concessional finance or blended-finance instruments from Guyana Development Bank or DFIs
- Public–private partnerships where government provides land or grid connections
- Anchor-client agreements with furniture clusters or large manufacturers

Development impacts include:

- Improved quality and consistency of furniture and wood products
- Increased use of lesser-known species, supporting sustainable forest management

- Reduced waste and higher value recovery from harvested timber
- Job creation in kiln operations, logistics, and quality control
  Strengthened readiness for regional and EU export markets

7.1.7 Conclusion regarding independent kiln drying facilities

Independent kiln drying facilities address a clear structural bottleneck in Guyana's furniture value chain. They are technically feasible, financially attractive, and strategically aligned with national industrial development objectives and EU forest partnership priorities. With rising domestic demand, tightening sustainability requirements, and strong interest from manufacturers, conditions are favourable for public and private investment in this segment, making independent kiln drying a priority, bankable intervention for scaling value-added wood manufacturing in Guyana.

7.2 Furniture manufacturing cluster zones

7.2.1 Rationale

Furniture manufacturing in Guyana remains highly fragmented, with most producers operating from small, informal or semi-formal workshops located in residential areas. These settings lack adequate space, storage, dust control, finishing rooms, and compliant waste management. As a result, manufacturers face persistent constraints in scaling production, improving quality consistency, meeting occupational health and safety standards, and supplying institutional or export markets.

Establishing **dedicated furniture manufacturing cluster zones** (industrial estates designed specifically for wood and furniture processing) offers a structural solution to these constraints. By co-locating manufacturers and providing shared infrastructure and services, cluster zones can significantly reduce individual investment requirements, improve compliance and quality, and unlock economies of scale. International experience shows that such clusters are particularly effective for SME-dominated sectors where firms are too small to invest individually in modern infrastructure.

For Guyana, furniture clusters also provide a practical mechanism to formalise the sector, strengthen traceability, and support compliance with emerging market requirements such as the EUDR.

7.2.2 Structure and Services

A typical furniture manufacturing cluster would accommodate **8–12 manufacturers**, each operating from a leased plot or factory shell of approximately **0.5 - 1 acre**, depending on production scale. The cluster would be supported by a set of **shared facilities**, avoiding duplication and improving utilisation of capital-intensive assets.

Core shared infrastructure could include:

- Kiln drying facilities (see Section 7.2.1), serving all cluster tenants
- Covered timber storage and conditioning areas
- Spray finishing and drying rooms, compliant with environmental and occupational health standards
- Centralised waste collection and wood residue management
- Shared security, fire safety, and access control
- Showroom and buyer meeting space for institutional and export clients

- Optional value-added facilities could include shared CNC machining stations, edge-banding equipment, or component manufacturing units, depending on tenant profiles and demand.

This setup allows small and medium manufacturers to access infrastructure that would otherwise be unaffordable, while improving production efficiency, quality consistency, and buyer confidence. Shared facilities would be designed to incorporate dust collection, safe finishing systems, waste segregation, and other environmental controls in line with EPA requirements.

7.2.3 Location and development model

Clusters should be developed in **pre-zoned industrial areas** with existing or planned access to roads, electricity, and water. Priority locations could include:

- Soesdyke–Linden Highway corridor
- Outskirts of Georgetown (e.g. Heroes Highway / East Bank)
- East Bank Essequibo and Berbice growth areas

Land would ideally remain **publicly owned**, with long-term leases granted to a private developer/operator under a public–private partnership (PPP) or concession arrangement. This approach reduces upfront land costs for investors while allowing government to retain strategic control over land use and sector development.

7.2.4 Management and governance: anchor operator model

Each cluster Each cluster zone requires a **dedicated anchor operator** responsible for:

- Day-to-day management and maintenance
- Operation of shared facilities
- Tenant coordination and rule enforcement
- Financial management and reporting
- Liaison with government agencies and buyers

The anchor operator enters into a long-term agreement with government (or landowner) and sub-leases plots and services to tenant manufacturers. This structure aligns incentives for professional management and financial sustainability. Potential anchor operators include:

- Established furniture manufacturers with scale and market access
- Private industrial park developers or facility management firms

Selection of tenants should focus on:

- Compliance with GRA, NIS, and EPA requirements (relocation to industrial zones would support EPA compliance)
- Product and market potential
- Commitment to using shared facilities such as kilns or finishing stations

7.2.5 Business model

Furniture clusters can be an investable business opportunity for potential anchors and investors and grow into self-sustaining commercial enterprises. A professionally managed cluster can generate multiple revenue streams, improving bankability and resilience.

Potential revenue sources for investors include:

1. **Land or factory shell leases**
    - Monthly or annual lease payments from tenant manufacturers
    - Differential pricing based on plot size and service level
2. **Shared facility service fees**
    - Kiln drying (per board foot or per batch)
    - Spray booth usage (per hour or per batch)
    - CNC or machinery usage (if applicable)
3. **Utility and service recovery charges**
    - Electricity, water, waste management, security, and maintenance
    - Typically charged as a service fee or bundled into leases
4. **Value-added services** (optional)
    - Centralised procurement of timber and inputs
    - Quality control and grading services
    - Compliance support (EPA, GNBS, traceability documentation)
    - Export and buyer coordination services

7.2.6 Indicative investment and operating economics

A pilot furniture cluster hosting 10 manufacturers could be developed with the following indicative parameters:

Capital investment (GYD 180–250 million)

- Site preparation and internal roads
- Utility connections and basic infrastructure
- Shared facilities (kiln, finishing rooms, storage, security)
- Administration and showroom facilities

The exact investment needs will depend on land preparation costs, technology choices, and scale

Indicative annual revenues (GYD 55–80 million):

- Lease income (10 tenants): GYD 25–35 million
- Shared facility services (kiln, finishing, etc.): GYD 20–30 million
- Utilities and service recovery: GYD 10–15 million

Operating costs (**estimated at 40–50% of revenues**)

- Management staff, security, maintenance, utilities, admin

Indicative operating profit GYD 25–40 million per year. At this scale, payback periods of **6–8 years** are achievable, with strong upside if occupancy rates are high and value-added services expand.

Role of government and EU Forest Partnership

To attract private investment, government support can focus on **enabling measures**, rather than direct operation:

- Provision or long-term lease of suitable industrial land
- Streamlined permitting and zoning approvals
- Basic off-site infrastructure (roads, power substations, drainage)
- Targeted fiscal incentives (e.g. duty-free machinery imports, tax holidays)

The EU Forest Partnership and EU/DFI financial mechanisms can play a catalytic role through concessional or blended finance for first-mover clusters and technical assistance for cluster governance, ESG standards, and SME integration.

7.2.7 Impact and strategic relevance

Furniture manufacturing cluster zones generate multiple development benefits:

- Enable SME manufacturers to scale and professionalise
- Improve quality consistency and delivery reliability
- Facilitate compliance with environmental, labour, and traceability standards
- Strengthen domestic supply chains and import substitution
- Create skilled and semi-skilled jobs in manufacturing and services
- Support regional and EU export readiness
- Physical platform for complementary interventions, including training, apprenticeships, design support, and buyer engagement.

Furniture manufacturing cluster zones represent an investment-ready opportunity for Guyana’s furniture sector. Combined with kiln drying services and if designed as commercially operated enterprises with shared facilities, professional management, and diversified revenue streams, they can attract private capital while delivering strong development outcomes.

7.3 Buyer–seller matchmaking and market linkages

7.3.1 Rationale

Weak and fragmented market linkages remain a major constraint on the growth of Guyana’s furniture sector. While demand exists in public procurement, the hospitality sector, regional markets, and selected export niches, many buyers report difficulty identifying reliable local suppliers that can meet specifications, volumes, and delivery schedules. At the same time, many furniture manufacturers lack visibility, market information, and the commercial capacity to access larger or more consistent orders.

This disconnect results in lost business opportunities, continued reliance on imports, and weak incentives for manufacturers to invest in quality improvements, kiln-dried inputs, and expanded production capacity. Strengthening buyer–seller matchmaking can therefore play a critical role in reducing transaction risk, improving demand predictability, and supporting investment across the value chain.

The GMSA hosts UncappeD each year, bringing together agro-processors and entrepreneurs to showcase their products and connect with consumers. The event links participants to regional and international markets through trade partners and diaspora networks, while a new digital platform launched in 2025 provides ongoing online visibility, extending opportunities beyond the physical marketplace. A similar matchmaking model could be applied to the furniture and timber industry to connect producers with buyers and expand market access.

7.3.2 Proposed model and components

A strengthened buyer–seller matchmaking model should build on existing platforms and initiatives, in particular the Uncapped trade and investment event and the GMSA-hosted digital platform, rather than creating parallel systems. The model could consist of four complementary components:

1. Furniture-specific trade fair

An annual furniture and timber trade fair, organised by GMSA with partners such as GO-Invest, MINTIC, THAG and housing agencies, could bring together:

- Local institutional buyers (government, schools, developers)
- Regional wholesalers and retailers
- CARICOM-based hoteliers, architects, and developers

Building on the existing Uncapped event, a dedicated furniture event or pavilion would provide a structured platform for manufacturers to engage with domestic institutional buyers, developers, hospitality operators, and regional importers. The focus should be on B2B meetings, product presentation, and sourcing discussions, rather than retail sales.

2. Online B2B market platform and supplier directory

The existing GMSA digital platform can be expanded to include a curated furniture supplier directory, presenting verified information on products, production capacity, lead times, and quality attributes such as the use of kiln-dried lumber and local hardwoods. This would improve year-round visibility and support follow-up transactions beyond physical events.

3. Procurement readiness programme

A targeted procurement readiness programme would support selected manufacturers in preparing for public and large private contracts. This would focus on understanding tender requirements, costing, production planning, quality control, and delivery management, reducing the risk of failed contracts and improving buyer confidence.

4. Pilot test with 1-2 product categories

Pilot sourcing arrangements with public agencies, hospitality projects, or regional buyers would allow manufacturers to test their ability to meet specifications, volumes, and delivery schedules under real conditions. These pilots would generate practical learning, build trust, and help refine standards before scaling up.

An EU export pilot test could also be organized under a partnership between Guyanese manufacturers and EU buyers (e.g. the ones mentioned under 5.3.3) with 1–2 product categories where Guyana has clear advantages - e.g., hardwood outdoor furniture and artisan live-edge tables. A pilot shipment could be supported by subsidizing part of the costs and/or facilitating the partnership and process.

7.3.3 Investment opportunities and impact

Together, these four components address visibility, readiness, and execution in buyer–seller relationships. By improving market access and reliability, they strengthen the commercial case for investment in independent kiln drying facilities and furniture manufacturing cluster zones, increase capacity utilisation, and improve manufacturers’ ability to access finance by demonstrating orders and repeat clients.

Expected outcomes:

- Stronger and more reliable buyer networks
- Greater visibility and trust in Guyanese-made furniture
- Reduced reliance on imported furniture in public procurement and the hospitality sector
- New jobs in marketing, logistics, platform management, and buyer services

7.3.4 Conclusion regarding buyer–seller matchmaking and market linkages

A structured buyer–seller matchmaking system is a low-cost, high-impact intervention that complements investments in production capacity, quality upgrading, and clustering. By building on the Uncapped event and the GMSA digital platform, and combining trade exposure, procurement readiness, and pilot transactions, the proposed model reduces market risk and helps translate policy objectives into commercially viable outcomes for Guyana’s furniture sector.

8 Conclusion

Guyana's furniture sector has a strong foundation. It benefits from country's unique tropical hardwoods, and a domestic market that continues to grow as construction, hospitality and public investment expand. With careful planning, investment and stronger collaboration across government, industry and training institutions, the sector could establish itself as a recognised supplier of high-quality and sustainable furniture within the wider Caribbean region and in selected international markets.

Strengths

Guyana's hardwoods such as Greenheart, Purpleheart and Locust are known for their durability and attractiveness, giving local furniture a distinctive appeal. Skilled carpenters and joiners, and small producers add further value through craftsmanship and attention to detail. Domestic demand is also growing, supported by a rising middle class and increased investment in housing, hotels and restaurants.

Guyana's VPA with the EU under FLEGT, along with the GTLAS, already provides a strong foundation for demonstrating legal timber sourcing. Although furniture is not yet covered under the VPA, it guarantees that the raw materials used are legally harvested, which is important for international buyers.

Guyana participation in regional and international trade frameworks, including CARICOM and CARIBCAN, provides additional opportunities through lower tariffs and easier access to nearby markets. With consistent quality and adherence to standards, local producers could reach more buyers both locally and internationally.

Weaknesses

Despite these strengths, the sector remains fragmented. Many producers operate from small workshops with limited equipment, leading to uneven quality, low production volumes. Weak business management, limited marketing and minimal online presence make it hard for producers to connect with wider markets.

A shortage of skilled workers is another major challenge. While carpentry traditions are strong, modern techniques such as CNC cutting and advanced finishing are rarely taught. Technical and vocational training and apprenticeship programmes are limited, which slows innovation and productivity.

Access to raw materials is also a constraint. Certified kiln-dried lumber is scarce, making it difficult to meet export standards. Without reliable drying and grading, products risk defects and rejection in higher-value markets. The lack of clear, sector-specific regulation and heavy reliance on imported materials such as MDF, plywood and pine further expose weaknesses in the supply chain.

Opportunities

There are strong opportunities for growth. Public procurement offers a stable local market, as schools, hospitals and offices regularly require furniture. Gradually introducing local content requirements could help ensure that a larger share of this demand benefits domestic producers.

Hospitality and tourism are other promising areas. The expansion of hotels and eco-lodges will increase demand for locally made furniture that reflects Guyanese culture and makes use of local hardwoods. The Guyanese diaspora abroad also represents an emerging niche market for high-quality furniture with local roots.

International buyers are showing growing interest in sustainable sourced tropical hardwood products. By strengthening FSC and PEFC certification and improving traceability, Guyana can build a reputation for ethical and high-quality production, gaining access to niche markets where buyers are willing to pay more for verified sustainable products.

Joint initiatives could further boost competitiveness. Furniture cluster zones with shared facilities, such as kilns, finishing workshops and showrooms, would help smaller producers reduce costs and improve consistency. A national digital marketplace and an annual furniture trade fair could increase visibility and market access, while new apprenticeship schemes and closer collaboration with technical institutes would help address the skills gap.

The EU Forest Governance and Value Chains Programme (FGVC), a key mechanism for implementing the Forest Partnership between Guyana and the EU and implemented by FAO, supports this framework through the sawmilling curriculum and SME accelerator. A furniture sector development initiative could complement the existing EU Forest Partnerships actions implemented by FAO and other partners.

Action Points

To move the sector forward, several practical steps are needed.

1. Strengthen and enforce standards for lumber grading and traceability, and expand voluntary sustainability certification.
2. Establish cluster zones with shared facilities to reduce fragmentation and improve efficiency.
3. Build managerial and operational capacity through targeted training and mentoring for furniture manufacturers.
4. Expand technical and vocational training, focusing on modern machinery and finishing. Reinstate apprenticeships to give young people hands-on experience.
5. Raise the sector’s visibility through a shared digital platform and an annual trade fair connecting producers, buyers, government and investors.
6. Use public procurement to support growth by phasing in local content requirements for furniture in schools, hospitals and offices.

Closing Note

These actions together outline a clear path for the transformation of the sector. Guyana’s furniture industry has the resources, skills and market access to succeed. What is now needed is organisation, investment and long-term vision. By improving standards, strengthening skills and connecting producers to new markets, Guyana can build a competitive, sustainable furniture industry that creates jobs and supports economic diversification.

9 Annexes

9.1 List of stakeholders consulted

#	Name	Position	Agency/Company	Stakeholder group		
1	Richard Soorie	Owner	Range Developments Grenada Ltd / Unique Woodworking (T&T)	Caribbean importer / furniture retailer (T&T)		
2	Mr. Baksh	Manager	American Construction	Construction company		
3	Gavin Cao	Manager	Shandong	Construction company		
4	Andrew Mendes	Owner	FMCG 2020 Inc	Developer		
5	Ryan Gomes	Owner	Ryre’s realty	Developer / construction		
6	Terrence Simeon	Owner	TNSS General Construction	Developer / construction		
7	Sanchia Persaud	Owner	592 Apartments	Developer / Hotel		
8	Sunita Roopchand	Owner	Caribbean Inn Inc.	Developer / Hotel		
9	Aleem Hussain	Owner	NexGen Global	Developer / Property management		
10	Gerald Pereira	Owner	P&P Realty	Developer / Property management		
11	Joseph Hoyte	Owner	Stanakas International Enterprises	Developer / Property management		
12	Andre Cummings	Owner	Floor It	Developer / retailer		
13	Raveena Raghundan	Owner	A&R woodworking	Furniture Manufacturer		
14	Angel Singh	Owner	A&S Furniture	Furniture Manufacturer		
15	Ranal	Owner	Bijadhar's furniture establishment	Furniture Manufacturer		
16	Garett Chisholm (Malcom rec)	Owner	Chisholm furniture	Furniture Manufacturer		
17	Jimmy	Owner	D. Persaud and Sons Woodworking Est	Furniture Manufacturer		
18	Wayne Da Silva	Owner	DaSilva woodworking	Furniture Manufacturer		

#	Name	Position	Agency/Company	Stakeholder group		
19	Rajesh	Owner	ECN Woodworking	Furniture Manufacturer		
20	Ndibi Schwiers	Owner	Eco-Solutions Inc.	Furniture manufacturer		
21	Frank	Owner	Ganpat furniture and general construction	Furniture Manufacturer		
22	Mohammed Ali	Owner	Guy-America	Furniture manufacturer		
23	Harry	Owner	H. Seepaul Woodworking Establishment	Furniture Manufacturer		
24	Keasha	Manager	Ituni Joinery Workshop	Furniture Manufacturer		
25	Vishal	Owner	Lakhram Khubir Woodworking	Furniture Manufacturer		
26	Troy Roberts	Owner	Movements Exquisite Design	Furniture Manufacturer		
27	Kemsingh	Owner	Nexus Wood Working	Furniture Manufacturer		
28	Gavin Agard	Shareholder	OM Custom Woodworking	Furniture manufacturer		
29	Kelsey Alexander	Furniture supervisor	OM Custom Woodworking	Furniture manufacturer		
30	Mohammed Ali	Factory manager	OM Custom Woodworking	Furniture manufacturer		
31	Parmanand Furniture Workshop (EPA)	Owner	Parmanand Furniture Workshop	Furniture Manufacturer		
32	Paul Hinds	Owner	Professional joiners	Furniture Manufacturer		
33	Tharesa	Owner	R&T Furniture	Furniture Manufacturer		
34	Rocky Sookwah	Owner	Rockey's Woodworking	Furniture Manufacturer		
35	Deochand Shivrattan	Managing Director	Shivrattan Moulding	Furniture manufacturer		
36	Marcus Shivrattan	Production Manager	Shivrattan Moulding	Furniture manufacturer		
37	Shawn Sommerson	Owner	Sommerson’s Furniture	Furniture manufacturer		
38	Rakesh	Owner	Triple A furniture store	Furniture Manufacturer		
39	Alice Layton	Founder	Wabbani	Furniture manufacturer		
40	Jason Chacom	Owner	Zajo Products	Furniture Manufacturer		

#	Name	Position	Agency/Company	Stakeholder group		
41	Saajid Husani	Owner	Zayna CNC	Furniture manufacturer		
42	Desmond Allen	Owner		Furniture Manufacturer		
43	Amar Tikka	Owner		Furniture Manufacturer		
44	Vickey Ramkhellawan	Owner		Furniture Manufacturer		
45	Duwie Dasrath	Owner		Furniture Manufacturer		
46	Andrew Da Silva	Owner		Furniture Manufacturer		
47	Andre	Owner		Furniture Manufacturer		
48	James	Owner		Furniture Manufacturer		
49	Jocelyn Dow	Owner / Shareholder	Liana Cane Furniture / Cara Lodge	Furniture manufacturer / Hotel		
50	Mark	Manager	401 Furniture Store	Furniture Manufacturer / retailer		
51	Ms.	Store manager	401 Furniture Store	Furniture Manufacturer / retailer		
52	Hemraj Kissoon	Managing Director	Modern Industries Ltd. Kissoons Furniture store	Furniture Manufacturer / retailer		
53	Nicola Duggan	Owner	Paradigm logistics & management services	Property management		
54	Sandy	Owner	Sandy	Property management		
55	Ms. Umadai	Manager	Giftland Officemax	Retailer		
56	Gillian Matthews	Managing Director	Courts Guyana	Retailer		
57	Divinia Luces	Merchandise Manager	Courts Guyana	Retailer		
58	Neil Boucher	Finance Director	Courts Guyana	Retailer		
59	Bianca Cummings	Store manager	Floor-It	Retailer		
60	Ms.	Store manager	Gafoors McDoom	Retailer		
61	Dionne Erskine	Assistant of Ms. Umadai (Manager)	Giftland department store	Retailer		
62	Mona Bynoe	Project Coordinator	FPA	Trade/Industry Association		

#	Name	Position	Agency/Company	Stakeholder group		
63	Ricky Ramsaroop		FPA	Trade/Industry Association		
64	Linden	Region 10 Small Loggers Association	FPA	Trade/Industry Association		
65	Roseanne Bulkan	Head Extractive sector	GMSA	Trade/Industry Association		
66	Maria Correia	Head Construction sector	GMSA	Trade/Industry Association		
67	Rafeek Khan	President	GMSA / Durable Wood Products - Duravilla Homes	Trade/Industry Association / Furniture Manufacturer		
68	Govindra Raghubansi	Executive Director	GMSA	Trade/Industry Association		
69	Oslyn Kirton	Executive Director	THAG	Trade/Industry Association		
70	Beaunce Atkinson	Marketing Coordinator	THAG	Trade/Industry Association		
71	Karen Small	Head Forest Department	EPA	Governmental Agency		
72	Edward Goberdhan	Commissioner of Forests	GFC	Governmental Agency		
73	Simone Benn	Assistant Commissioner of Forests, Communities Unit	GFC	Governmental Agency		
74	Anthony Seraiah Clarke	Member TWG	GFC	Governmental Agency		
75	Russhel Whyte-Samuels	Marketing officer	GFC	Governmental Agency		
76	Michelle Astwood	Environmental Specialist	Ministry of Natural Resources	Governmental Agency		
77	Eleonora Paci	Policy Officer at the European Commission	DG INTPA – Forests	EU-delegation		
78	Layla El Khadraoui	EU Policy and Programme Manager	EUD-Georgetown	EU-delegation		

#	Name	Position	Agency/Company	Stakeholder group		
79	Daniele De Bernardi	Programme Manager	EUD-Georgetown	EU-delegation		
80	Wojtek Dubelaar	Value chain and business development specialist	FAO NFOL	FAO NFO		
81	Theresa Loeffler	Forestry Officer	FAO GY	FAO NFO/GY		
82	Gillian Smith	Country Representative	FAOGY	FAOGY		
83	Anna Correia de Sa	Forest Partnership and FLEGT Facilitator	FAOGY	FAOGY		
84	Joshua Cummings	Local wood and furniture market consultant	FAOGY	FAOGY		

9.2 Survey/interview instruments

The questionnaire for manufacturers Questionnaire for manufacturers included 42 questions, covering baseline data such as size, year of establishment, production capacity, number of employees, level of mechanisation, procurement challenges, marketing and human resources, financing, certification, government and external factors.

The questionnaire for buyers Questionnaire for buyers included 12 questions covering buyer type, preference, percentage from local vs imported sources, challenges, and recommendations for improvement.

9.3 Conversion of imports by weight into item counts

Table 17 - Wood furniture imports into Guyana, 2020–2023, by weight or item count depending on category

Product group	Unit	2020	2021	2022	2023	Total
Furniture of other materials, including cane, osier	Kg	788,281	1,112,466	1,590,075	1,659,260	5,150,082
Doors and their frames/thresholds	Kg	890,411	995,205	1,187,770	873,831	3,947,217
Furniture parts	Kg	45,095	51,417	56,089	61,402	214,003
Articles of wood	Kg	44,675	58,922	57,265	36,390	197,252
Tableware and kitchenware	Kg	16,524	25,638	12,863	20,435	75,460
Woodwork, caskets, cases and similar articles	Kg	1,887	16,997	1,819	2,002	22,705
Statuettes and other ornaments	Kg	2,109	2,983	2,200	9,314	16,606
Wooden frames for paintings, photographs, mirrors, etc.	Kg	1,724	4,621	1,017	6,991	14,353
Windows, French-windows and their frames	Kg	1,186	5,461	647	1,011	8,305
General furniture	Item	17,972	35,138	32,948	44,656	130,714
Bedroom furniture	Item	12,001	14,805	17,774	47,166	91,746
Kitchen furniture	Item	1,770	3,924	7,994	8,370	22,057
Office furniture	Item	3,155	7,282	2,631	5,152	18,219
Seats of cane, bamboo or similar material	Item	813	319	7,735	3,163	12,030
Total		**1,827,602**	**2,335,178**	**2,978,827**	**2,779,142**	**9,920,750**

Some items weigh much less than heavier products like doors or windows, so raw weights are not representative. We therefore used approximate average weights for each category as described below:

- Furniture of other materials, including cane, osier: 10–20 kg per item (lightweight furniture pieces like chairs or side tables made from cane or similar materials)
- Doors: 25-30 kg (solid pine panel door; standard size of around 2.0 m × 0.8 m × 35–40 mm)
- Furniture parts: 1–5 kg per part (weight of individual components like legs or panels varies widely but generally light)
- Articles of wood: 2–8 kg per item (miscellaneous wooden objects, possibly small furniture elements such as side tables)

- Tableware and kitchenware: 0.2–0.5 kg per piece (cutting boards, bowls, utensils, mostly small and lightweight)
- Woodwork, caskets, cases and similar articles: 0.5-2.5 kg per item (small wooden boxes or decorative cases)
- Statuettes and other ornaments: 0.2–1 kg per item (small decorative wooden figurines)
- Wooden frames for paintings, photographs, mirrors, etc.: 0.5–2 kg per frame (depending on size and thickness)
- Windows, French-windows and their frames: 20–30 kg per window unit

Table 18 - Highest annual wood furniture imports into Guyana in units, 2020–2023, with estimated item count

Product group	Unit	Highest import quantity (unit^{-1})	Items (lower bound)	Items (upper bound)
Furniture of other materials, incl. cane, osier	Kg	1,659,260	82,963	165,926
Doors and their frames/thresholds	Kg	1,187,770	39,592	47,511
Furniture parts	Kg	61,402	12,280	61,402
Articles of wood	Kg	58,922	7,365	29,461
General furniture	Item	44,656	44,656	
Bedroom furniture	Item	47,166	47,166	
Tableware and kitchenware	Kg	25,638	51,276	128,190
Woodwork, caskets, cases and similar articles	Kg	16,997	6,799	33,994
Kitchen furniture	Item	8,370	8,370	
Office furniture	Item	7,282	7,282	
Statuettes and other ornaments	Kg	9,314	9,314	46,570
Wooden frames for paintings, photographs, mirrors, etc.	Kg	6,991	3,496	13,982
Seats of cane, bamboo or similar material	Item	7,735	7,735	
Windows, French-windows and their frames	Kg	5,461	182	273
Total		**3,146,963**	**328,476**	**642,517**