

FOREST TRENDS

Call for Consultancy: Study to understand the furniture industry in India

SCOPE OF WORK

Forest Trends is commissioning a field study and stakeholder and institutional mapping of the furniture industry in India, with a particular focus on imported materials and exported products.

This study builds on the findings of Forest Trends' 2020 desk-based report *India's Wooden Furniture and Wooden Handicrafts: Risk of Trade in Illegally Harvested Wood*. That report summarized India's domestic and imported timber flows in and out of the manufacturing industry, and exports to key markets which have developed regulations to exclude illegal timber imports (e.g. US and EU). The analysis assessed the risk (based on species, and likely source country) associated with these exports.

Additional work is now being commissioned with in-country field work in two cities or "hubs" for furniture manufacturing as well as a stakeholder/institutional mapping exercise.

Forest Trends is seeking a consultant/team of consultants to carry out and deliver the following activities:

1. National level Institutional and Stakeholder Mapping and Analysis of key actors in the wood industry

Consultant(s) will identify and provide short descriptions of the roles and responsibilities of:

- key institutions responsible for drafting of regulatory frameworks, monitoring and enforcement relevant to wood products industry, environmental and social standards, imports and exports.
- Key industry and trade associations, along with short summaries of their stated stances towards environmental and social standards.
- Key actors in the wood products industry.
- National and international commitments or policies related to environmental and social standards.

2. Field work focusing on two furniture manufacturing "hubs"

Focusing on two furniture manufacturing geographic "hubs" with industry clusters involved in the production of wood products exported to the U.S. and European Union markets. Hubs under consideration include: Jodhpur, Delhi, Jaipur or Sikar and Mumbai or Bangalore.

The consultant will compile existing information and conduct interviews to answers to the following questions:

- What is the structure of the furniture industry exporting to the US and EU, and how is this changing?
 - Size distribution of industry players (employment, turnover, exports)
 - Sub-categories (raw material suppliers, traders, sawmills, manufacturers, distributors, furniture assemblers)
 - High end vs low end production
 - Perceived growth drivers (or drivers of change)

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- Raw material supply, differentiated across different players (e.g. micro, SMEs, large companies)
 - Imports vs domestic production
 - Species preferences, with a particular focus on teak
 - Species country of origin
 - Use of reclaimed wood, especially for export markets
 - Procurement methods of raw materials
 - Which products are using “high risk” (domestic high risk and imported) wood as defined by the Forest Trends report India’s Wooden Furniture and Wooden Handicrafts: Risk of Trade in Illegally Harvested Wood?
 - Which products are using low risk wood as defined by the Forest Trends report India’s Wooden Furniture and Wooden Handicrafts: Risk of Trade in Illegally Harvested Wood?
 - Emergence of new materials in recent years
 - Extent of certification or other eco-labeling
 - Requirements or demand for supply chain transparency

- Exports and Market preferences
 - What are the furniture preferences for Indian consumers vs European and US markets?
 - What are species preferences for India consumers vs European and US markets?
 - Profit margin differentials between markets
 - Structure of contracts (made to order from US or European buyers, etc?)

DELIVERY OUTPUTS

National level Stakeholder Mapping/Analysis of key actors in the wood industry

1. Stakeholder analysis map/list

Field work focusing on two furniture manufacturing “hubs”

1. Write up of interviews
2. Summary of key findings from the fieldwork
3. PowerPoint of key findings and presentation to Forest Trends

EXPRESSION OF INTEREST

To express interest in carrying out the study, please send a proposal, budget for time and travel costs as well as CV(s) to outline how the key questions and activities will be delivered.

Please send all materials to:

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