

American Hardwood Export Council European market report

November/December 2019



MARKET UPDATE



**MORE CLARITY IN THE UK
HARDWOOD MARKET AFTER
GENERAL ELECTION**

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**POLISH STUDENTS DESIGN
TABLES USING BOARDS OF U.S.
RED OAK**

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ACTIVITIES



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Wärmebehandeltes Holz für Pflegezentrum in Barcelona

Benedetta Tagliabue vom Studio Miralles Tagliabue (EMBT) realisierte in Barcelona ein neues Pflegezentrum für Krebspatienten. Das Kildis Sant Pau. Bereitgestellt vom Verband für amerikanische Laubbömer (AHEC), wurde für die Außenhaut des Baus ein thermisch modifiziertes Tulpenbaumholz eingesetzt. Die Wärmebehandlung macht es besonders

Das Kildis Sant Pau von EMBT liegt in direkter Nachbarschaft Barceloner Hospital de Sant Pau. 400 Quadratmeter verteilten sind von lichtdurchfluteten offenen Bereichen und privaten R des Heus von einem großen Garten. Die Architektur soll die F Dazu trägt auch die Inneneinrichtung der Architekten und Inne bei.

Eingesetzt wird das von der AHEC bereitgestellte wärmebeha

**HIGHLIGHTS FROM THIS
MONTH'S PRESS**

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EVENTS



UPCOMING EVENTS

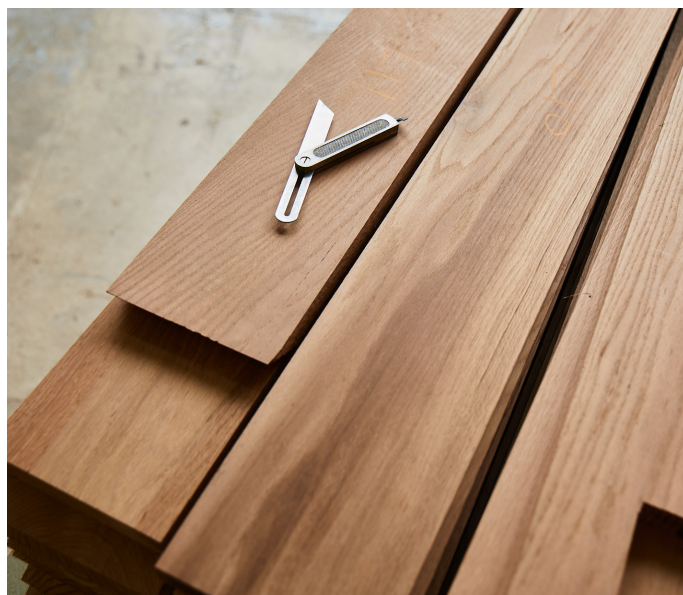
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MARKET UPDATE

In our last report for this year, we get an early reaction from the UK hardwood trade to the election results and the news that the UK will now definitely leave the European Union. The UK is easily the most important market for the U.S. hardwood industry in Europe, currently accounting for a third of all lumber exports to the region. We also report on the International Hardwood Conference that took place in Berlin in November.

UK hardwood sector welcomes greater post-election clarity

Whether Remainer or Brexiteer, the mood among UK hardwood importers is relief that the British election has had a decisive outcome. While the exact shape of the trade deal the two will strike post-Brexit is yet to be decided, they say, with the Conservative Party victory, business now knows that the UK will leave the EU and can start planning accordingly. “What was doing the most damage was the pre-election and Brexit uncertainty, it was just toxic for business generally,” said a major hardwood importer-distributor. “Everyone was taking a wait and see approach; from major developers, to manufacturers, through to consumers, investment and purchasing was put on hold.”



More clarity in the UK hardwood market after election results

Others said they had had the same experience. The consensus was that the hardwood trade had become slower as 2019 progressed, with the last six months described by one company as ‘the quietest we’ve had for a few years’. “Customers have been buying increasingly little and often, forward ordering dried up and nobody wanted to hold any more stock than they had to,” they said. Importers now anticipate something of a post-election bounce in trade as postponed construction and manufacturing projects came back on stream. “I just spoke to a building surveyor who said he’d had nine jobs commissioned just on the back of the election result,” said another importer-distributor.

Some caution remains in the sector, however, with one company saying that it will take time for the market to rebuild significant momentum. “In construction, for instance, there will be a delay



Some say it might take time to re-build significant momentum in the market

before we see a solid recovery as hardwood is principally a second and third fix material,” they said. “We generally expect a year to 18 months’ delay before we feel the impact of trends in construction, positive or negative.” There is also still concern about the mechanics of trading with Europe post-Brexit, and in particular about potential hold-ups through ports and customs as new processes bed in. But the Timber Trade Federation (TTF) confirmed that the UK timber industry had been focused on these issues since





UK government to make transition to new UK-EU relationship post-Brexit as seamless as possible

the EU referendum in 2016 and had impressed on decision makers the need to minimise hold ups. There will undoubtedly be changes to the way goods are moved across borders but providing demand in the economy holds-up the TTF believes most importers will be able to manage any extra paperwork.

On timber legality assurance, the UK government has already pledged to implement the EU Timber Regulation (EUTR) into post-Brexit UK law to become the UKTR. In the event of a no-deal Brexit UK companies would have to put all timber imported from the EU through illegality risk due diligence, which they did not have to do previously. However, importers are reassured by government noises that it wants a deal that ensures as seamless as possible a transition to a new UK-EU relationship and that the two will work together to minimise trade barriers.

The hardwood trade also welcomed the new UK government's pledges on construction, with the promise of 1 million new homes in the next five years. "It's not quite clear whether this is the target for social housing and housing association affordable homes, or housing generally," said an importer. "But any commitment to a construction increase is good news."

Challenges and opportunities highlighted at International Hardwood Conference (IHC)

AHEC took part in the IHC in Berlin in November, which drew an audience of 125 from 20 countries, organised by the European Organisation of Sawmill Industries (EOS) and European Timber Trade Federation (ETTF), with German Sawmill and Wood Industries Association (DeSH) as national hosts.

Increasing indications of global economic deceleration, said speakers, were undermining



The International Hardwood Conference (IHC) highlighted challenges and opportunities in Berlin in November

customer confidence, with particular concern about slowdown in key markets, notably China and Europe. The verdict of the IHC was that the China-US trade dispute, albeit with the tentative signs of settlement, had not just impacted the U.S. industry, but was further undermining consumption and investment in the wider international market. Continuing lack of clarity on a post-Brexit UK/EU trade deal caused added business uncertainty, albeit that after the recent re-election of the British Conservative Party has ensured Brexit will definitely now happen.

European speakers also highlighted apparent impacts of climate change on forest health in Europe. Urgent action was needed, they said, to maintain the European hardwood sawmill industry's raw material supply base. But the IHC was not just about hardwood sector challenges.



Positives were spotlighted too. As provider of a renewable, climate-change mitigating material, speakers said, it had unprecedented opportunity to substitute energy intensive rivals, steel, concrete and plastic. New understanding and means of communicating its carbon and life cycle performance added to its impetus.

According to the EOS, sawn hardwood consumption in EOS member countries, plus Italy and the UK, was forecast to decline 1.3% in 2019 to 5.7 million m³, following 7.2% growth in 2018. Production is predicted 0.7% lower at 6.07 million m³. Adding to trade concerns were Europe's growing tree-health problems. Ash die-back and drought stress in other species, such as beech, pose a significant threat to raw material supply. As for Germany's hardwood sector, increased competition from alternative materials plus overseas log demand, had seen its domestic sawn hardwood market shrink 50% from 2000 to 2020 to around 800,000m³.

The European Parquet Industry Federation (FEP), said the European wood flooring industry had recovered steadily since the international recession. However, European consumption remained 20 million m² below 2007 levels at 79.8 million m². FEP member country production slipped in 2018 by 1.3% and the market remains highly competitive. Key concerns were competition from wood-look luxury vinyl (LVT) products, the threat of cheap flooring diverted from the US due to China-US trade tensions, and over dependence on European and white oak (which together account for over 80% of European wooden flooring consumption at the moment). Ash is the second most used hardwood for flooring, with just under 7% of production share, but there are concerns over long term availability due to threats from ash die back in Europe and EAB in the U.S.A.

ACTIVITIES

Polish students team up for a design challenge using red oak

AHEC have created an interesting second phase to the *Natural Born* red oak project in collaboration with leading Polish designer Tomek Rygalik (see September report). Tomek teaches post graduate design students at Warsaw's Academy of Fine Arts and with AHEC's support he is leading a design project in red oak in which his students will be working in teams with students from the Poznan school of wood engineering. The four design teams will each design and make a table in red oak using the lumber boards from the *Natural Born* exhibition. These tables, together with sets of Tomek's *Natural Born* red oak chairs, will form the focus of a high-profile discussion event in 2020 with some of Poland's major influencers, including policy makers, designers and journalists.

To kick-start the project, technical consultant Neil Summers ran a workshop for all the students in Warsaw in November in order to provide them background on American hardwood sustainability and performance potential, with a specific focus on red oak.



Polish students to create tables from U.S. red oak boards used for the *Natural Born* exhibition in October



U.S. Hardwood features in four winning projects at the annual Wood Awards



MultiPly won in the Small Projects category at this year's annual Wood Awards

A cultural institution, a temporary modular structure, a quirky set of cabinets and a sleek, long bench were four winners of the Wood Awards 2019, and they all incorporate American hardwood. The winners of the annual UK Wood Awards were announced at a ceremony held on the 19th November at Carpenters' Hall in London. Established in 2000, the Wood Awards aims to

recognise and encourage outstanding design, craftsmanship and installation using wood. MultiPly (U.S. tulipwood) by Waugh Thistleton Architects won the Small Projects category, the refurbishment of the Royal Opera House was recognised in the Commercial & Leisure category (U.S. walnut); while David Gates' Littoral Chances 1&2 cabinets (U.S. hard maple) won in the Bespoke Furniture category; and the sleek, Long Bench (U.S. walnut) designed by Ian McChesney is this year's Production Furniture winner.

AHEC participate in focused event for the German wood trade

AHEC took a stand at the specialised German wood trade show, Brachentag Holz in Cologne in November. This event, which also has an accompanying seminar programme, is organised by the German timber trade association, GD Holz. The majority of the exhibitors and visitors were from the wood trade and industry in Germany. AHEC used the opportunity to push the red oak message, talking about the comparative study made earlier in the year that concluded that in almost all of the main woodworking processes, red oak performs as well as or better than European oak. Of course, there is still the issue of appearance, because it does have a different look, but AHEC were able to highlight the positive responses to the material from the many designers and architects we have been working



The refurbishment of the Royal Opera House won in the Commercial & Leisure category



AHEC's stand at Brachentag Holz in November



with.

As part of the seminar programme environmental consultant Rupert Oliver presented the findings of the updated Seneca Creek legality study and other AHEC environmental tools, such as the interactive forest map, the AHEP and LCA research. This direct contact with key companies in the German trade is a valuable part of our marketing efforts to demonstrate the environmental credentials of American hardwoods.

Hundreds of architects attend AHEC seminars in Spain and Italy

AHEC have held two more high profile seminars for specifiers each attracting more than 250 architects. The first, held in November in the historic Italian city of Florence, was part of a series of events with architectural magazine The Plan. The second, held in Madrid in December, was put in collaboration with media group Infodita that publish a number of construction and architectural titles. For both events AHEC invited renowned European architects who talked about how designing with wood shapes the philosophy of their business and why they believe American hardwoods have an important role to play in sustainable building design. At each event AHEC's European Director opened proceedings with an introduction to American hardwoods with



Panel discussion with AHEC European Director David Venables and other speakers at architectural seminar in Madrid

particular focus on their sustainability and why it is vital to embrace underused species such as red oak, maple and cherry.

Hundreds of questionnaires were collected and are now being analysed as part of AHEC's programme evaluation. It appears that a significant proportion of the audience at each event were inspired to consider using American hardwoods in future projects. AHEC technical publications and samples were handed out.



Hundreds of people attended the architectural seminar in Florence

NEWS ROUND-UP

Red oak campaign drives target audiences to AHEC website

AHEC have created a series of adverts, working with the craftsmen at Benchmark furniture, to promote red oak across Europe. Both adverts were made by cleverly CNC'ing U.S. red oak to show the words 'renewable' and 'versatile' – two of red oak's most appealing attributes. The adverts can be used as animations online or static for print. Using the slogan 'oak redefined', the adverts are being used to direct users to the red oak species page on americanhardwood.org through social media, online banners and print adverts across Europe and will soon be used in other markets across the world.



You can download the animated versions for use on your own social media platforms here:

https://www.dropbox.com/sh/lukq7r2tjpla5eg/AAave5o4TiWESI_pfG0s1UsNa?dl=0



Renewable ad, as part of AHEC's latest red oak campaign



Versatile ad now up and running on AHEC social media platforms, as well as several major online platforms, driving traffic to AHEC's website

Record year for americanhardwood.org and AHEC social media

Traffic to the americanhardwood.org website saw an all time high in 2019 with the number of new

users increasing from 45,401 in 2018 to **78,850 in 2019** – an increase of **42%**. The American red oak and sustainability pages reached the top 5 most visited pages of the website in December, as well as the Legacy project which remains as a top page since September.

AHEC's Instagram account increased in followers from 1,410 to **2,771 in 2019**, a **92.7%** increase and the biggest year on year increase of our account so far.



ENGAGEMENT	ENGAGEMENT	ENGAGEMENT
76%	6.9%	5.6%
LIKES 1.9K	LIKES 178	LIKES 140
COMMENTS 0	COMMENTS 7	COMMENTS 1
LINKIN.BIO CLICKS 0	LINKIN.BIO CLICKS N/A	LINKIN.BIO CLICKS 0

The best performing post on AHEC's Instagram account earned 1,900 likes



Seasons greetings from the AHEC Europe team!

Wishing you all a Merry Christmas and a happy new year. Thank you all for the continued support and we can't wait for an even more successful and exciting 2020.



Merry Christmas



PR HIGHLIGHTS



Wärmebehandeltes Holz für Pflegezentrum in Barcelona

Benedetta Tagliabue vom Studio Miralles Tagliabue (EMBT) realisierte in Barcelona ein neues Pflegezentrum für Krebspatienten, das Kálda Sant Pau. Bereitgestellt vom Verband für amerikanische Laubhölzer (AHEC), wurde für die Außenhaut des Baus ein thermisch modifiziertes Tulpenbaumholz eingesetzt. Die Wärmebehandlung macht es besonders widerstandsfähig und somit für die Verwendung im Freien geeignet.

Das Kálda Sant Pau von EMBT liegt in Barceloner Hospital de Sant Pau. 400 I sind von lichtdurchfluteten offenen Be Das Haus von einem großen Garten. D Dazu trägt auch die Inneneinrichtung bei.

Eingesetzt wird das von der AHEC ber Außenpergola und als Fassadenverkle Witterungsbeständigkeit, aber auch w

Kalida Centre
American tulipwood
Detail | Germany

333,000
circulation

Komunikaty PR

Wystarczą dwie deski czerwonego aby powstały przepiękne, kreatywne meble



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Rycotewood Furniture College
American red oak
Newseria Lifestyle | Poland

30,000
circulation



Madera de diseñadores

Jóvenes talentos crean muebles que se transmiten de padres a hijos, como 'objetos infinitos'

ANTONIO PANIAGUA

Andrés Mariño, Sergio Rodríguez, María Soriano, Irene Venturini y Daniel Romero, en el carpintero La Navarra (Madrid). © GUSTAVO QUINONES

en la manera de fabricarlos, he diseñado unos muebles que me cuenta más fabricarlos que las propias piezas en sí, dice este madrileño que vive en la luz en EE.UU. Es el creador del 'Taburete Redwood', así llamado porque está hecho con la misma tecnología que empleaban los primeros constructores de barcos.

AL DETALLE

Mentores

La arquitecta Isabel Chacolla, el diseñador de muebles Antonio Serrano y Sebastián Cos, británico que hace mobiliario con técnicas artesanales - todos ellos nombres de prestigio en el sector - han sido los mentores de los concursantes de 'Toca Madera'.

Ellos han invitado a los jóvenes diseñadores para que sus piezas sean sostenibles y populares. Los otros participantes en el concurso son Estrella...

ambitos materias primas no renovables por otras que sí lo son.

Funcional. La cuna 'Cradle to Cradle' es también un mueble y un par de sillas.

bles, por ejemplo, para elaborar barcos de vela.

La razón de que se escija esta materia prima obedece a que el certificador está organizado por la Asociación Americana de Maderas Breviados (AHEC, por sus siglas en inglés), junto a la Asociación de Ingenieros en Diseño Industrial (AIDI).

Cuna, sillas y sillones

A veces una pieza es en una silla, como es el caso de 'Cradle to Cradle', un mueble que se puede convertir en cuna y un par de sillas. El Ingeniero Industrial Daniel Romero pertenece a su equipo de tres diseñadores que concurren a la convocatoria con un refectorio que tiene vocación de continuidad, de ser útil en la niñez y la vida adulta. «Así como se parece mucho entre ellas porque están sujetas a un montón de normativas. Los bebés no pueden escalar ni escapar de ellas. Así que además de la cuna apostamos por la silla, que es la que más va a durar».

A partir de un juguete impenetrable como la perrera, el diseñador de producto Sergio Rodríguez ha ideado un proyecto denominado 'Ballarina'. Lo que pensaba ser algo de magistral acabó convirtiéndose en una cuna. Las perreras, con sus alas que evitan la huida de pequeños bailarines, reposan en platos sostenidos por varillas, como los que usan los malabaristas. «Como este mueble como un espacio flexible que se puede usar como un gran tocador». Las perreras son un juego que hacen posible un ritual: mientras giran, uno puede hacer memoria para que no se le olvide nada al salir de casa: las llaves, la billetera, el móvil, etc. Cuando regresa da vuelta a la perrera para solucionar los problemas o meditar», afirma Rodríguez.

El tiempo en que la vida es monótona, María Soriano parte de la premisa de que lo único constante es el cambio. Se trabaja que se inspira en este pensamiento, lleva por nombre 'Dove' (nube). Se trata de un conjunto de sillas primarias, inspiradas en el monte y la tierra, formadas por dos troncos y dos entalles, dos luminarias y unos percheros, objetos que se pueden utilizar en su totalidad, un dormitorio o un baño.



PRODUCTOS ▾ DISEÑO ▾ CONTRACT ▾ EVENTOS ▾ EMPRESAS ▾ ARQUITECTURA ▾ PROV



Natural Born, un proyecto de Tomek Rygalik que inspira y desafía a la industria del mueble

25 NOVIEMBRE, 2019

Toca madera
American red oak
El Norte De Castilla | Spain







25,000
circulation

Natural Born
American red oak
Infurma | Spain

22,000
circulation



UPCOMING EVENTS

<p>13-19 January 2020*</p>  <p>IMM Cologne Furniture and Interiors Fair Trade show Cologne Germany</p>	<p>17-21 January 2020</p>  <p>Maison & Objet Interior design fair Paris France</p>	<p>1-29 February 2020*</p>  <p>Madrid Design Festival Festival Madrid Spain</p>
<p>4-8 February 2020</p>  <p>Stockholm Furniture and Light Fair Furniture fair Stockholm Sweden</p>	<p>10-13 March 2020*</p>  <p>Fimma Maderalia Trade show Valencia Spain</p>	<p>21-26 April 2020*</p>  <p>Salone del Mobile Milano Design Fair Milan Italy</p>

*DENOTES AHEC PARTICIPATION

EXCHANGE RATES

	31/08/19	30/09/19	31/10/19	30/11/19
1 EURO = \$	1.10	1.09	1.11	1.101.11
\$1 = EURO	0.91	0.93	0.89	0.91
£1 Sterling = \$	1.22	1.23	1.29	1.29
\$1 = Danish DKr	6.78	6.84	6.72	6.77
\$1 = Swedish SKr	9.80	9.82	9.69	9.56
\$1 = Czech Kr	25.56	23.64	23.80	23.15
\$1 = Hung'y Forint	300.5	306.7	296.20	303.1
\$1 = Polish Zloty	3.96	4.00	3.83	3.92
\$1 = Russian Rouble	66.68	64.77	63.89	64.32
\$1 = Turkish Lira	5.81	5.65	5.73	5.74

