

American Hardwood Export Council European market report

April 2018



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MARKET UPDATE

Latest design news and trends from Milan

Held every April, Milan Design Week encompasses the annual international furniture exhibition (Salone del Mobile) and a set of design and architecture focused events, distributed in different areas of the city. It has become one of the most important international design events in the calendar and attracts a truly global audience. AHEC's Lauren Smith was in Milan and reports on what was new and trendy.

This year it was interesting to see the massive influence that technology is having on design. Tech-giant Google presented for the first time, merging technology into homewares, leading furniture and product design brand Hay collaborated with Sonos for their first venture into the technological world and leading social media platform Instagram launched its own design-based Instagram account specifically for design week - highlighting how influential the platform has now become in the design industry.



Oak dining tables and benches were given a darker finish by furniture brand Hay.



Moulded veneer office chairs by Italian furniture brand Kartell, in collaboration with Phillippe Stark.

Amidst this shift, it seems that wood is back on a lot of big brands' radars, with many exploring veneer as a way of incorporating technology whilst retaining an element of craftsmanship. Renowned Italian furniture brand Kartell exhibited

its first collection in wood - a series of office chairs created in collaboration with designer Phillippe Starck. The chairs were made using a German method of pressing veneers into moulds to create a perfectly refined seat form. Japanese studio Nendo designed the first completely wooden chair design for Fritz Hansen in 60 years using a combination of solid wood, again with moulded veneer seating and, in a more experimental approach, Dutch designer Job van den Berg created a series of shelves created by rolling oak veneer into layered cylinders and tubes. A greater focus on the potential of timber technology will be a huge opportunity for AHEC as we continue to push the use of developments such as cross-laminated timber and laminated veneer lumber.

The Salone Satellite takes place every year at the fair and provides a platform for up and coming designers to connect with trade and manufacturers. In this area there was a lot more experimentation with a variety of species, such as maple and birch, and a more craft-based approach to design. Sustainability was very much at the forefront of a lot of designers' projects through the use of recycled or natural materials, making new designers the perfect audience for AHEC to demonstrate the environmental credentials of American hardwoods.

Whilst white oak and ash continued to dominate the fair, there was a trend towards the application



of darker finishes, suggesting the beginnings of a preference of species with warmer, richer tones. In some instances the oaks were American, and there was also some walnut. Beech seemed to be increasingly popular, especially for the use of chairs. It seemed that walnut was less prevalent in new designs than in previous years, although is still used extensively by the market heavyweights such as Riva 1920, which suggests that is still in demand and selling well.

German slowdown dampens European wood flooring demand

An insight into the current status of the EU wood flooring market and the wider economic situation in individual EU countries is provided by the report of the meeting on 4 April 2018 of the Board of Directors of the European Federation of the Parquet Industry (FEP). According to the report, compared to the same period last year, provisional results for the first quarter of 2018 point to a continuation of the moderately positive European parquet consumption trends observed in 2017, with the exception of Germany, which is reporting a significant decrease.



American white oak flooring at the 2015 Milan expo.

raw material is not a critical issue for the time being. This implies some easing of the supply problems that have emerged in recent years owing to the sectors very heavy reliance on oak, which now accounts for around 80% of production.



American red oak flooring featured at Bloomberg's European HQ in London.

The report notes that new build projects are the main driver of the market for wood flooring in Europe, although renovation is creating significant additional activity. It also notes that despite the long and wet winter in Europe, the availability of

The report includes a rapid-fire appraisal of the market situation in each of the countries represented by the FEP membership: **Austria:** parquet sales continued to increase by 2% in the first quarter of 2018 compared to the same period last year. **Belgium:** parquet sales are estimated to have increased by 3% during the first three months of 2018. **Baltic States:** Baltic countries' markets showed a slightly positive trend in the first quarter of 2018. **Denmark:** the Danish parquet market remains flat overall, a decrease in the retail market is compensated by rising demand from building contracts and projects. **Finland:** parquet sales increased by 1% in the first quarter, mainly driven by moderate growth in large projects while the residential market is stable. **France:** parquet sales are gradually recovering, rising an estimated 2% in the first quarter of 2018. **Germany:** parquet sales are estimated to have fallen 5% in the first quarter of 2018 compared to the same period in 2017. This decrease reflects the subdued residential market, a lack of installation professionals, intense competition from "wood look" floor coverings, and diminishing store



space allocated for hardwood flooring by DIY retailers. **Italy:** parquet sales increased 2% in the first quarter of 2018 and continue to benefit from more positive economic developments in the country. **Netherlands:** parquet sales increased by an estimated 3% during the first quarter of 2018 in line with improving economic conditions in the country. **Norway:** the market was flat with some signs of slight improvement (less than 1% growth) during the first months of 2018. **Spain:** despite the turbulent political situation, the Spanish market expanded slowly by between 1% and 2% in the first quarter of 2018. **Sweden:** parquet consumption increased 2% in the first quarter. Declining retail sales were offset by increased demand from building projects. Sweden is currently the most dynamic market in Scandinavia. **Switzerland:** parquet consumption remains flat but at a high level with numerous large on-going renovation projects. **UK:** as a country without a significant domestic flooring manufacturing sector, the UK is the only large EU consuming country not covered in the FEP's rapid appraisal of market conditions. However, information from the UK Construction Products Association (CPA) indicates market conditions for flooring and other joinery products in the UK deteriorated in the opening months of 2018.

ACTIVITIES

Promoting red oak

During April AHEC's European team continued to develop and coordinate a number of individual design projects all linked by a common theme; raising the profile of red oak in Europe.

Rycotewood (Oxford, UK): students presented their final red oak designs for their storage unit project that AHEC is supporting.

Polish designed red oak collection: at a meeting in Warsaw, designer Tomek Rygalik outlined his initial design ideas based on a collection of products aimed at highlighting the grain and colour potential of red oak.

Venice Biennale: AHEC are working with Spanish architects EMBT who are presenting a canopy installation in Venice for the high profile architecture biennale, which features frames and elements made in red oak. The red oak has been manufactured in Spain and AHEC were on hand to record this process as part of the communication



AHEC's Rocío Pérez-Íñigo and Questia PR meet with the designers at Studio Rygalik.

for the project.

We continue to get an extremely positive reaction to red oak from designers, architects and consumers. Yet industries in Europe are reluctant to invest in its potential and market it. "We tried it once but our customers didn't like the colour" or "it's not as easy to work with as European oak" seems to be a default position for many European traders and manufacturers. While it is true that red oak lumber exports to Europe are on the



American red oak frames, part of the Venice Biennale project with EMBT, being oiled in Spain.



increase, volumes are very small in comparison to white oak. It is being used mainly in products where the wood is stained or colour is not critical. But could red oak sustain a significant increase in demand from Europe? The answer is yes it can. Nearly one out of every five hardwood trees standing in the forests is a red oak. The net annual growth after harvest is over 21 million m³, which means it takes 0.57 seconds for 1m³ of sawn lumber to be replaced in the forest by new growing stock.

Check out the numbers for yourself at www.americanhardwood.org. At a time when oak is the most fashionable and demanded hardwood in Europe, and current white oak supplies from within Europe and from North America are increasingly under pressure, it remains to be seen



Students at Rycotewood college present their designs in American red oak.

how much longer European markets can continue to ignore such an important resource.

U.S. hardwoods feature at French wood construction conference

AHEC were invited to speak at the annual French Forum Bois Construction on building with timber. It was an opportunity to talk about the ground breaking structural projects that AHEC had been involved with over the last 18 months showcasing the structural use of American hardwoods in; [The Smile](#), [Maggie's](#) and [Lords](#). This

annual conference attracts a varied audience of architects, designers, manufacturers, from all over Europe. Over 1500 participants were due to attend the 3 day event. Although quite insular in their choice of timber for construction, preferring home grown timber wherever possible, France as a nation is one of Europe's most forward thinking countries when it comes to building with timber. The hardwood session was well attended and there was lots of interest in the structural potential of U.S. hardwoods, with specific questions about the commercial viability of tulipwood CLT and also tulipwood LVL (Laminated Veneer Lumber).

This was the first time AHEC had attended the event, which proved a valuable networking opportunity. For example, one of the largest Swedish architectural practices has asked if AHEC would come to Stockholm and run a workshop on American hardwoods for their staff.

NEWS

Leading architect praises tulipwood CLT at annual conference

AHEC visited the second annual Materials for Architecture 2018 conference and exhibition, a platform for specifiers to learn about the latest innovations in building materials. At this year's conference, guest speaker Patrick Usbourne,



Patrick Usbourne, Associate at dRMM Architects presents tulipwood CLT at the Material 2018 conference.



Associate at dRMM Architects, presented his talk on *Maggie's Oldham: Realising the potential of hardwood CLT*. AHEC first worked with Alex di Rijke of dRMM architects to create the *Endless Stair*, the first public experiment with American tulipwood CLT, created during the London Design Festival 2013. This initial experimentation and research lead to dRMM specifying tulipwood CLT in 2017 for the Maggie's Centre in Oldham. The centre became the world's first building made from hardwood cross-laminated timber and a pivotal moment for modern architecture and construction.

Patrick's presentation covered the importance of designing healthy architecture and the potential of tulipwood CLT as bringing a revolutionary new element to wood construction. He also spoke extensively about the benefits, working properties, sustainability and longevity of tulipwood CLT and how the properties of American tulipwood provided a strong aesthetic look, strength and warmth that wouldn't have been achievable with other timbers.

PR HIGHLIGHTS

Impresión digital decorativa de gran formato en Heimtextil



El estado de la creatividad de HP en la feria Heimtextil (celebrada del 6 al 8 de mayo de 2017 en Frankfurt, Alemania), el martes elegido por la empresa de tecnología de la información para mostrar la variedad de aplicaciones que permite la tecnología de impresión digital en el diseño de interiores y la decoración personalizada a cualquier escala. El estado de HP recubre distintas habitaciones, cada una de ellas con una finalidad y uso diferentes, que a su vez requieren distintos requisitos de diseño y decoración. Desde una consulta médica con papel de pared antibacteriano a un café con sillones que absorben el sonido y papel decorativo OLED Wallpaper, cada entorno cuenta una historia que cobra vida a través de la tecnología de impresión HP Latex HP Indigo, con diseños que abordaban problemas actuales como el empobrecimiento, la contaminación, el reciclaje y el medio ambiente. La impresión digital en color con calidad de fotografía es un proceso innovador que permite incrementar la velocidad en la producción, reducir de forma considerable el desperdicio de material, y generar importantes beneficios a la hora de imprimir bajo demanda. Apta para grandes volúmenes de impresión

Delgado y Partners eligió el roble rojo estadounidense como elemento fundamental estético para el interior de la sede central de Bloomberg en Londres, un proyecto estrella que podría marcar la implantación definitiva de este tipo de madera en Europa. Diseñado por un equipo de Foster + Partners, bajo la dirección del propio Norman Foster, el impresionante edificio ubicado en la City londinense se perfila como candidato de diversos premios de arquitectura. Aunque a veces se dice que el roble rojo por su color, sus prestaciones o su tono rico combinado con sus propiedades técnicas, lo que hoy que Bloomberg y Foster se decantan por esta especie. La sostenibilidad también contribuye a la elección. La relevancia del roble rojo en el edificio se hace patente ya en el vestíbulo, donde se han utilizado 1.800 metros cuadrados de paneles arquitectónicos entrecruzados. Esta madera también tiene una presencia destacable en la sala multimedios, un espacio flexible concebido para la celebración de reuniones y presentaciones situadas junto al auditorio del edificio. En este caso se han utilizado 1.900 metros cuadrados de madera laminada encolada, que forman las paredes con aspecto de "letras" que definen el espacio.

La decisión de utilizar la madera como pavimento supuso probablemente el mayor desafío técnico. Una vez más, la innovación permitió superar los dificultades técnicas y funcionales. Bloomberg concluyó una solución que permitió levantar y instalar las tablas individuales según fuese necesario mediante un sistema y sus tres magníficos.

En Estados Unidos esta variedad se utiliza a un sinnúmero de aplicaciones de construcción, interiores y fabricadas, y en otros mercados como China, Japón la demanda es enorme. En Europa, el embargo la popularidad del roble rojo siempre se ha situado — hasta

El roble rojo estadounidense se instala en Europa



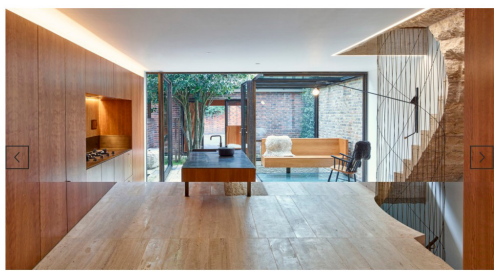
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Bloomberg HQ, London
U.S. red oak
Diseño | Spain

13,000
circulation



WNĘTRZA W ODCIENIU WIŚNI

TEKST: JUS, ZDJĘCIA: AMIN TAHA
LONDYN, 13.4.2018
DESIGN: MIEJSKA

Czy można stworzyć stylowe, a jednocześnie przytulne wnętrza w dużych przestrzeniach mieszkalnych, stosując w wykończeniu drewno wiśni amerykańskiej? Znana z nietypowych projektów londyńska pracownia architektoniczna Amin Taha + GROUPWORK udowodniła, że tak. Pracownia przeprowadziła niezbędny remont zabytкового domu w jednej z centralnych dzielnic angielskiej stolicy.

Wzrosty w latach 50. XX wieku budynek przeszedł różne koleje losu, do czasu gdy wprowadzili się do niego pięciopokolenowa rodzina, poszukująca pomysłu na wnętrza zapewniające odpowiednie zagospodarowanie otwartej przestrzeni i wykorzystanie wysmakowanych materiałów. Jednym z nich stało się ciepłe, atrakcyjne wizualnie i przyjemne w dotyku drewno wiśni amerykańskiej. Budynek zlokalizowany jest przy ulicy Caroline Place, cichej enklawie szeregowców w dzielnicy Baywater, nieco na północ od Hyde Parku i Kensington Gardens. Wyrazistość fasady podkreśla


Łódź
Design Festival
19-27
października
maja 2018

wpadnij na Design!

Caroline's Place, London
American cherry
Design Alive | Poland

4,000
circulation

THE WOOD AWARDS: 2018 CALL FOR ENTRIES



Maggie's Oldham. Image © Alex de Rijke

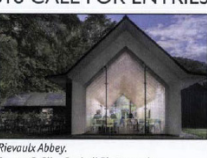
Established in 1971, the Wood Awards recognizes, encourages and promotes outstanding design, craftsmanship and installation using wood in projects throughout the UK. The Wood Awards' elite independent judging panel not only judges all submitted entries, but also visits the shortlisted projects in person, making the Wood Awards a uniquely rigorous competition.

Anyone involved in a UK-based wood project is invited to enter, and has until 25 May to submit their applications.

The shortlist will be announced in July, and the winners will be announced at the Wood Awards ceremony on 20 November 2018 at Carpenters' Hall, in London. The shortlisted projects will be on display at the ceremony and during the London Design Festival in September.

Stephen Corbett, of Green Oak Carpentry, and design critic, Corinne Julius, are the new Buildings and Furniture & Product judging panel chairpersons.

With permission from the owner, anyone associated with a building or product completed in the last two years can enter. Buildings must be located within the UK, whilst furniture and other products must have been either designed or manufactured



Rievaulx Abbey. Image © Giles Rochell Photography

in the UK. Fitted furniture must be in the UK. The competition is free to enter and entrants may submit more than one project. There are no restrictions on the size or budget of a project.

The 2018 categories will be confirmed at the shortlisting. Building categories are likely to be Commercial & Leisure, Education & Public Sector, Interiors, Private and Small Project. The Furniture & Product competition will be split into Bespoke, Production Made and Student Designer which is open to anyone currently in education or who has left education in the past 12 months. Within the Student category there are two cash prizes (£1,000 for the Winner and £500 for the People's Choice). Other awards, such as Structural and Existing Building awards, can be given at the judges' discretion.

Mears Group will be sponsoring this year's Gold Award. The Mears Group Gold Award will be the winner of winners, chosen from the winners of all the categories.

Major Sponsors of the Wood Awards 2018 are **American Hardwood Export Council**, the **Carpenters' Company** and **TRADA**.

Other sponsors include American Softwoods, Arnold Laser, Forestry Commissioner, Timber Trade Federation, Wood for Good and the Furniture Makers' Company.

Wood Awards, UK
UK timber design competition
Building Engineer | UK

8,800
circulation



UPCOMING EVENTS

16th - 17th May



**ARCHITECT
@WORK**

Architect @ Work
Design fair | Copenhagen |
Denmark

22nd - 24th May



**CLERKENWELL
DESIGN
WEEK**

Clerkenwell Design Week
Design fair | London | UK

30th - 1st June



**CARREFOUR
INTERNATIONAL DU
BOIS**

Carrefour du Bois
Trade fair | Nantes | France

30th - 9th July



**gdynia
design
days**

Gdynia Design Days
Design fair | Gdynia | Poland

15th - 23rd September*



**THE
LONDON
DESIGN
FESTIVAL**

London Design Festival
Design fair | London | UK

2nd - 4th October*



NHLA

NHLA conference
Conference | Toronto | Canada

18th - 19th October



EGURTEK

Egurtek
Architecture and trade fair | Bilbao
| Spain

*DENOTES AHEC PARTICIPATION



EXCHANGE RATES

	31/01/18	28/02/18	31/03/18	30/04/18
1 EURO = \$	1.24	1.23	1.23	1.21
\$1 = EURO	0.81	0.81	0.81	0.83
£1 Sterling = \$	1.41	1.39	1.41	1.38
\$1 = Danish DKK	6.00	6.05	6.06	6.14
\$1 = Swedish SEK	7.89	8.18	8.39	8.64
\$1 = Czech CZK	20.42	20.6	20.61	20.96
\$1 = Hungary Forint	250.32	255	253.96	257.42
\$1 = Polish Zloty	3.35	3.39	3.42	3.46
\$1 = Russian Rouble	56.22	55.9	57.53	62.15
\$1 = Turkish Lira	3.78	3.79	3.98	4.04