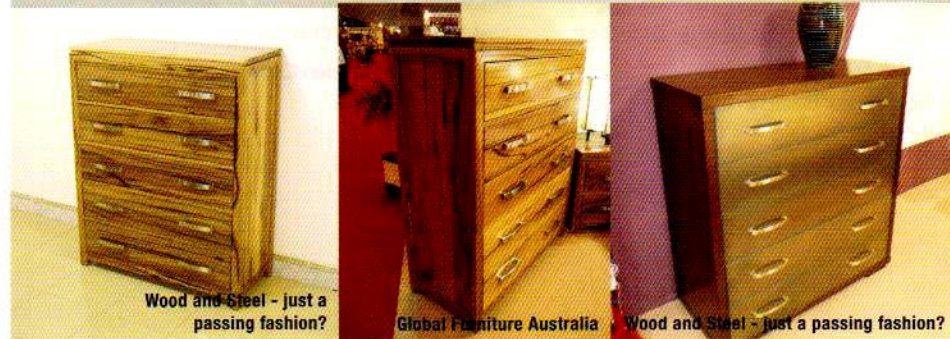


HARDWOOD FASHIONS AND TRENDS IN WOOD: FUTURE CHALLENGES AND OPPORTUNITIES



Lui Hon Fay with architectural training designs in American oak



Wood and Steel - just a passing fashion?

Global Furniture Australia

Wood and Steel - just a passing fashion?

Extracted from a presentation by Michael Buckley at the American Hardwood Export Council Convention (AHEC) in Athens in October 2009.

WE ALL KNOW in this trade that we are in the fashion business - like it or not. We can attempt to influence trends, but we can do little about fashion. Over the last 20 years of working with AHEC, I have seen many fashion changes in wood. However, by far the most important trend has been the acceptance of wood as a modern material by many, dare I say most, architects.

As an example, in 1998/9 RIBA Journal - a leading architectural title in the UK - was planning a special issue on flooring. On discovering that wood was not to be included I offered some independent copy. It was refused on the grounds that architects were not interested in unsustainable materials. That has largely changed. However, now, we really have good cause to complain about the lack of a level playing field - green points for concrete, steel and even PVC, but often not for wood.

First, I want to draw a distinction between fashion and trends! Fashion is fickle and often fast. Fashion tends to follow cycles, and can be highly unpredictable. Fashion is anybody's guess and who knows, for example, when black cherry will be back in fashion, or black walnut will fall out of fashion? These relatively short cycles are determined by many factors, not least escalating prices, for example, when some species of wood come under real demand pressure and are limited in supply. My belief is that we can do only a limited amount to influence fashion changes, and the most we really can do is to be ready for them.

Trends, by contrast, are much longer-term, more easily influenced and much more predictable. Some trends in wood can be traced back for decades, and trends can also be predicted, for example, when technical innovation occurs it can be relatively easy to spot the likely effects and consequences. Did the edge-lippings producers see what MDF would do to their market?

On a more micro scale of fashion we have seen the maple, cherry and walnut markets ebb and flow for years. A classic example a long time ago was Japan's bowling alleys' demands for hard maple. It developed with

such speed that it resulted in maple solid lumber being air-freighted from the US to satisfy demand. Right now consumers in most markets want black walnut; the world wants walnut logs and the Chinese won't let them have it if they can help it. We all know that this situation probably will not last, although it has definitely gone on longer than anticipated when it started.

In the world of hardwoods there are four enduring species that lead the pack in terms of availability, demand and usage in joinery, flooring, solid panelling and especially furniture. Two of them have structural significance but all four have decorative applications. I think it is interesting to note that they are much less subject to market fluctuations, caused by fashion, than many other decorative species. They are the staple hardwoods and in some cases almost un-lodgable from their respective market shares.

TEAK

For many consumers east (and west) of Suez, this is the king of species in terms of both performance and aesthetics. Ask anyone who is trying to sell other hardwoods to India. Teak now grows everywhere in almost any hot, moist climate; it is available from plantations and commands unrivalled demand in flooring, joinery and outdoor furniture markets as well as boats. There are few substitutes for teak - perhaps only African iroko or Asian Merbau. There are some cycles of fashion in interior teak furniture, but other than that, teak is relatively immune to fashion.

BEECH

This is a tricky one. Beech is much more concentrated by supply and more limited in terms of usage, but nevertheless beech is a major contender in the global market place. Its market ups and downs are caused only partly by fashion. It is much more of a commodity than the other three staples.

MAHOGANY

For the purpose of this discussion I include all mahogany from Central America to Africa and even Southeast Asia (as in the Philippine variety - lauan). Mahogany has its place in traditional furniture and joinery markets, but fashion cycles are gentler and also have a lot to do with environmental acceptance, depending on usage.

OAK

This has been the number one species

for furniture and flooring in the world's industrialised markets for the last 10 years at least, and has been taking a longer view - throughout the history of construction, furniture and even ships. It is the most widely available temperate hardwood worldwide and consequently lends its name to imposters too. (Eucalypts from Tasmania and Papua New Guinea are known as oak, although thankfully no longer Malaysian rubberwood!) In the case of North America and Europe, the supply of oak is highly sustainable, whereas in Japan, China and Siberian Russia, it probably is not. It represents about half the eastern US hardwood forest resource. Oak is also available from plantations in Europe - since most French oak, for example, was planted at some point.

The issue here is that none of these four species really threaten each other, but they are all threatened by outside challenges, such as:

1. Substitution by
 - cheap, often inferior, alternatives
 - contractors
 - stained alternatives by furniture makers
2. Lack of knowledge by
 - specifiers who don't appreciate their qualities in performance
 - users who overestimate the performance of cheap substitutes
3. And finally by "nondescript" species.

By nondescript I mean un-named wood. This is a subject that needs some serious consideration, for several reasons. It is one of what I regard as a number of insidious challenges:

1. American hardwoods are named species. They have to be. There is too much wood finding its way to market as "wood" of no fixed abode. Stained species, mixed light hardwoods, "plantation" etc.
2. Too much wood in the market place is fraudulent - "plantation balau" if you can believe it! I am yet to find any colleague who has heard of it, but one UK online catalogue offers it.
3. Too much wood is simply un-identifiable. For example, reconstituted veneers are allowing wood of questionable source to be incorporated.

There are also some insidious trends to consider as a challenge to traditional hardwood use:

- Plantation species are accepted simply because they are not from natural forests, despite the fact that they are monocultures with low bio diversity and often

require chemical treatments for years after planting, which naturally regenerated forests do not.

• Bamboo is increasingly seen as only green, ignoring embodied energy and chemical and adhesive treatments when processed from round to square or flat material. It is also not automatically sustainable. In terms of current global demand, key US species, which are all from naturally regenerated and selectively harvested forests, are White Oak, Red Oak, Ash, Walnut, Cherry, Maple and Tulipwood.

For me, the greatest trend for wood has been its acceptance and even preference by architects, designers and consumers over the last decade. I also see it as the greatest threat if, as I believe possible, the trend was to be reversed. In Singapore, if you compare the 10 year-old 'Paragon' high-end shopping mall with the newly opened 'ION Orchard', all within the same district, there is a marked reduction in wood, which appears now to be seen now as a trimming material or a small area feature. There are also some signs that the furniture industry may be beginning to move imperceptibly away from wood and there is strong evidence that exterior furniture has been doing so for some time. It might be as well to remind the industry that wood is by far the most easily manipulated material of all, and has the highest environmental credentials of any in terms of carbon footprint and sustainability.



ABOUT THE AUTHOR

Michael Buckley is an acknowledged expert on the uses and market applications of hardwoods and has a Masters degree in US and European hardwoods. He is a Fellow of the Institute of Wood Science and works with leading furniture designers and many architects. Now based in Singapore, he gives many presentations on international wood issues.