

Exporting tropical timber doors and frames to Europe

Tropical timber doors and frames are a popular product group in Europe and can provide opportunities to exporters in developing countries. After the economic recession, the European market for doors and frames has improved again. Make sure that you focus your production on doors and frames that incorporate added value through sustainability certification, beautiful hardwood species, a unique design and competitive pricing.

Contents of this page

1. [Product description](#)
2. [What makes Europe an interesting market for doors and frames?](#)
3. [Which trends offer opportunities on the European market for doors and frames?](#)
4. [Which requirements should doors and frames comply with to be allowed on the European market?](#)
5. [Which requirements must you comply with?](#)
6. [Which additional requirements do buyers often have?](#)
7. [What are the requirements for niche markets?](#)
8. [What competition do you face on the European doors and frames market?](#)
9. [Through which channels can you get doors and frames on the European market?](#)
10. [What are the end-market prices for doors and frames?](#)

1. Product description

This product fact sheet covers doors, door frames and thresholds made from tropical wood species. This category includes products for exterior and interior use, including flush and sliding doors. Doors and frames can be either solid or composed of veneer, laminated material and panels.

Solid doors made from tropical timber are mainly produced for outside purposes. With the occasionally harsh climates in the EU/EFTA, the outside doors are often made from durable hardwoods with a density of between 600 and 900 kg/m³.

Engineered doors (panel and laminated veneer) are used for indoor purposes.

This export market is only attractive if you are able to produce large volumes at low prices. You have to compete with large-scale EU/EFTA producers, mainly located in eastern Europe. Tropical wood species with a density of between 300 and 600 kg/m³ are used. For most tropical suppliers, this market is not attractive.

Figure 1: Doors and their frames



Source: sinaransejati.com

For the classification of door and frames, the Eurostat Harmonised System (HS) is used. The main HS code used is 4418.20 Doors, their frames and thresholds. Within this group, the following code is used to identify various species: 4418.2010 Made of tropical wood. Product specifications can be separated into the following characteristics.

Quality and construction

Doors and frames are sold both finished and unfinished. Finishes offered in Europe by wholesalers typically include primed (cream colour), a standard basecoat stain (for softwoods) or making the door suitable for site finishing. Doors for external use are often offered primed. For retail sale, doors are also offered unfinished, primed, stained, lacquered or painted.

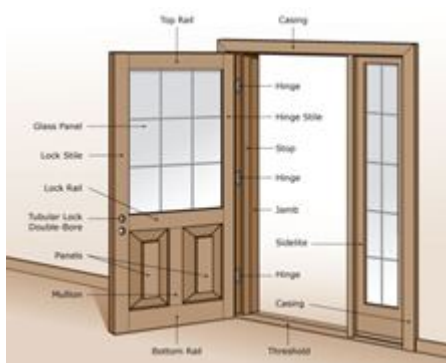
Other quality depends on the niche markets. There is a clear separation in high-end doors and cheap doors. Tropical timber doors are usually regarded as high-end doors. In addition to solid doors, common construction methods include engineered timber doors that are manufactured by binding together wood strands, fibres or veneers with adhesives to form a composite material which is often lighter than solid timber.

Doors are sometimes made from laminated veneered lumber with lippings of 9 mm to the outer edges and 6 mm to the top and bottom of the door, which permit trimming for a perfect fit. These doors are often constructed using blocks or strips of timber glued together and covered in a real wood veneer, also known as Laminated Veneered Lumber (LVL).

A wide range of both solid and engineered doors are sold in Europe.

Doors and frames are sold kiln dried (KD); for inside and outside purposes, use 8-12% moisture content.

Figure 2: The main parts of a door and frame



Main species

The most common tropical hardwoods used depends on the targeted country, as indicated below.

Germany: mahogany, red meranti, sipo, utile and wenge.

Spain: sapelli, niagon, iroko, afromosia and doussie, sapucaia, Asian teak and anigre.

United Kingdom: sapelli, dark red meranti and iroko.

France: meranti, mahogany, limba, tiama and tineo.

Netherlands: merbau.

Dimensions

The standards for outside doors are 2015, 2100, 2115 and 2315 mm high, 830 mm wide and 38 or 54 mm thick. The standards for inside doors are 2015, 2100, 2115 and 2315 mm high, 730, 780 or 830 mm wide and 38 mm thick.

Straight corners tolerance is +/- 1 mm per 500 mm and the general measurement tolerance is +/- 1 mm. Preferably, R3 is used for rounded corners. Some companies offer pre-hung doors in a frame ready for fitting, while others offer them as flat packs.

Colours

This aspect depends on the targeted buyer. Some buyers want their doors primed with a basecoat stain, while

others want them lacquered or with no finishing at all. Tropical doors are often sold without any paint or lacquer, as consumers buy these doors for the colorful timber.

Types of packaging

The International Standards for Phytosanitary Measures (ISPM) apply to wooden packing materials. Standard packaging for each door includes plastic wrapping with cardboard corner protective covers, foam board or cardboard wrapping, or wrapped and stacked in wooden crates for protection. Pre-hung doors are usually shipped knocked down and crated. Products are placed on heat-treated pallets with protectors for the pallet-wrapping strips and stacking strip to separate the doors.

This packaging is generally for protection rather than for marketing purposes.

Orders are usually transported and counted by the number of containers (20 ft or 40 ft). Dry Cargo Containers defined as 20'GP (general container), 40'GP and 40'HQ (high cube) are normally used for shipment. If the density of your wood product is very high and the volume of the order is low, it is recommended that 20'GP containers are used.

If the volume is large, it is recommended that 40'GP containers are used. The shipment of doors could also be combined with other dry goods to reduce costs. Transport costs are generally higher for solid doors, which may impact the final retail price.

Labelling

Labelling depends on your buyer and your end market. In the event that your door ends up on the retail market, all labels must specify the product's size, species, function, possibilities to paint and the ways that the door can open. There should also be an indication of whether the door is glazed or non-glazed as well as its thermal efficiency.

2. What makes Europe an interesting market for doors and frames?

The statistics below are based on Eurostat data on doors and frames.

There are basically two larger streams of tropical timber doors and frames on the European market. On the one hand, some products are produced in developing countries (roughly 35% of the market). On the other hand, there are doors and frames produced in factories throughout Europe and made from imported tropical sawnwood (roughly 65% of the market).

As a result, some European countries are exporting more tropical finished doors and frames than they actually import. This situation means that there is also a second stream of local production made from imported sawnwood.

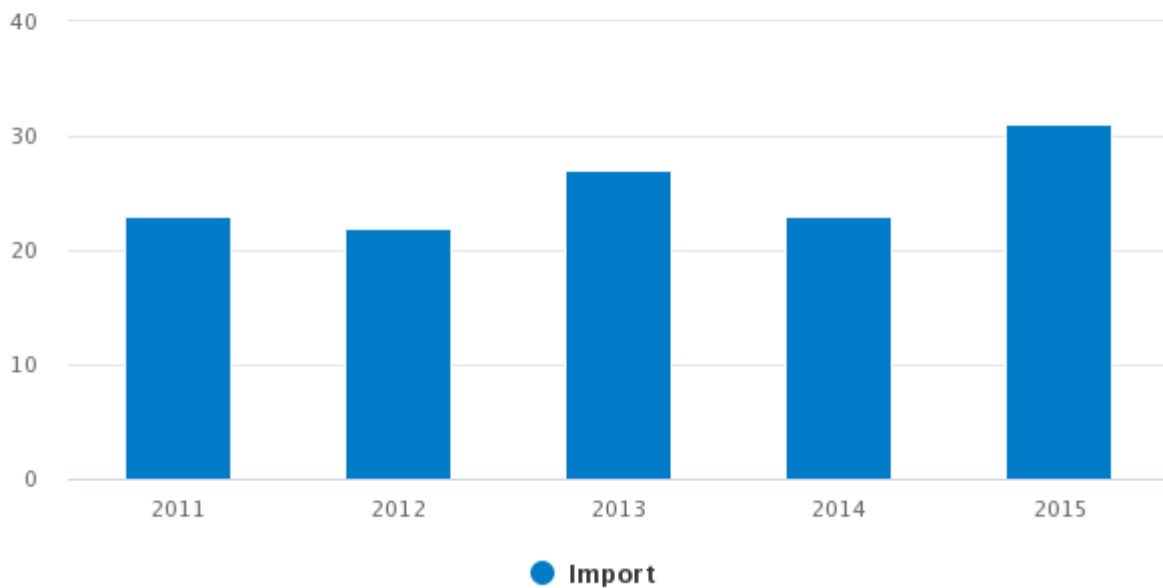
As can be seen below, Europe is an interesting market for doors and frames. Imports from developing countries are substantial and have been increasing again in recent years.

Import: substantial increase

The figure below presents the import of doors and frames from developing countries to the 28 European Union countries.

Figure 3: Imports of doors and frames 2011–2015

in € million



Source: Eurostat 2016

During the period between 2011 and 2014, imports to Europe were more or less stable. The imports have since grown, amounting to € 31 million in 2015. As explained above, there are two streams in Europe. The graph above only represents imports from developing countries. The import from other European Union countries is considered “local production” (doors and frames made from imported tropical sawnwood).

The strict implementation of the EUTR might still affect imports of tropical doors and frames in the coming period, since Europe has been actively blocking imports of illegal timber as well as non-verifiable timber.

In 2015, the largest importers were the Netherlands, the United Kingdom, France, Luxembourg and the Czech Republic. The leading suppliers were Indonesia (€ 26 million), Malaysia (€ 3 million) and China (€ 1 million).

Tip:

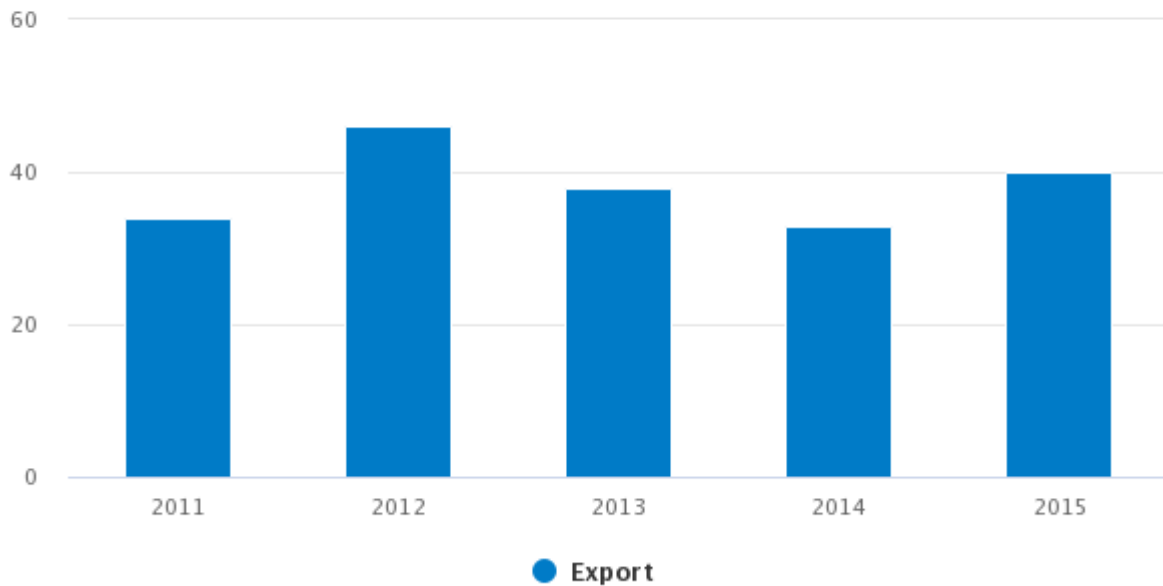
As competition between developing countries will be fierce, it is recommended that exporters differentiate their products; for example, exporting your products with a higher added value by focusing on finishing and design is recommended as a means of distinguishing yourself from competitors.

Exports: on the way up

The figure below presents the export and re-export of doors and frames from the 28 European Union countries to the rest of the world.

Figure 4: Export of doors and frames 2011–2015

in € million



Source: Eurostat 2016

European exports declined several years in a row, but they went back up to around € 40 million in 2015. The total export from European countries to other European countries in 2015 (intra-European trade as well as locally produced doors and frames made from imported sawn-timber) was € 27 million, or 68%. The remaining € 13 million, or 32%, was exported to the rest of the world. In 2015, the largest exporters were Ireland, Italy, the Czech Republic, Germany and Italy.

Production and consumption: stable increase

The figures below present the production and consumption of doors and frames in the 28 European Union countries.

The production of tropical doors and frames is realised by importing tropical sawnwood and processing it in factories around Europe. Although no clear production figures are available, it is possible to calculate the “intra-European trade”. Intra-European trade in this case means the export of tropical doors and frames to European Union countries by other European Union countries.

Some precaution is required, because part of this intra-European trade comprises the import and export of products that actually originate from developing countries. Nevertheless, it is estimated that this part is neglectable. The production figures are representing the slow economic recovery, amounting to € 50 million over 2015. Major producing countries are Ireland, Italy, Poland, Spain, Germany and the Czech Republic.

Figure 6 above presents the consumption of doors and frames in the 28 European Union countries. Consumption is calculated as Imports + Production – Exports. The consumption of tropical doors and frames follows the same pattern as the previous graphics and amounted to € 41 million in 2015.

The GDP and consumer confidence are expected to increase further in 2016. This development will further positively affect the consumption of these products, which are closely connected with the developments in the building sector. In 2015, the largest consumers were the Netherlands, the United Kingdom, France and Luxembourg.

Tip:

Make sure that you promote your product well. As tropical timber is used outdoors, qualities regarding durability, water resistance, resistance against fungi and insects should be emphasised, among other things.

3. Which trends offer opportunities on the European market for doors and frames?

The [CBI Tropical Timber Trend](#) document provides you with detailed trends on the European market for sustainable tropical timber and timber products. The section below gives a short summary of the most important developments and trends on the European Union market.

Substitution by soft and temperate wood species and non-timber alternatives grows. The increased availability of thermally and chemically treated softwoods and temperate hardwood means that tropical timber is increasingly being substituted in furniture, joinery and garden products. Temperate timber species such as oak and walnut are very popular in many European countries as well.

Naturally, timber produced in Europe is cheaper than imported tropical wood. Competing with cheaper doors, which are often mass-produced in eastern Europe, is difficult.

Workforce demographics stimulate outsourcing; production is slowly moving to eastern European and developing countries. Consumers are slowly returning to construction. The period of economic recession took the European construction market into a downturn, since fewer parties were constructing new homes. Nevertheless, the market for renovations remained steady and is now on the increase again.

Consumer awareness about deforestation and climate change increases. In most of the main importing countries of tropical timber in Europe, sustainability is high on the agenda of the consumers and thus also of governmental agencies, timber trade federations and large retailers. Traceability systems are gaining importance too.

More efficient processing, value addition and innovation are on the rise. To increase efficiency, there is a move towards processing techniques that enable the use of timber waste which would otherwise be discarded (for instance, finger jointing, lamination).

The Gross Domestic Product (GDP) in the European Union is expected to grow by 1.8% in 2016 and by 1.6% in 2017 (EU/EFTA Forecast 2015). The growth for 2017 was tempered in the last part of 2016 because of Brexit, the United Kingdom's withdrawal from the European Union.

The rise of demand in emerging economies continues. The rapid development of emerging economies is fuelling demand for tropical timber and timber products.

The pressure on price premiums mounts. The price premiums for certified tropical timber and timber products are under pressure because certification becomes “business as usual”.

Lesser-known species are in demand. An important part of sustainable forest management schemes is the promotion of lesser-known species. The scarcity of well-known/popular tropical timber species offers opportunities for new species.

The European Union Timber Regulation (EUTR) is meeting expectations only partly. The implementation of the EUTR is still in its infancy. In many European Union Member States, the monitoring of illegal timber trade is still insufficient.

The euro has appreciated against the US dollar, from a low of 0.72 euro/US dollar in April 2014 to a high of 0.94 in November 2016. This fact means that the euro is still weak (November 2016), which has influenced prices and price competitiveness. A stronger euro means that European buyers pay relatively lower prices for timber from many Asian and other countries that maintain timber prices in US dollars or have currencies linked to the US dollar.

4. Which requirements should doors and frames comply with to be allowed on the European market?

This buyer requirement section is separated into three parts: requirements that you *must* meet to be able to export, additional requirements that you *may* meet and niche requirements that you *can* meet. Below, you will find a summary only. For more information, please read the more detailed CBI document on “[Requirements with which your product should comply](#)”. You can also check the International Trade Centre’s [Standards Map](#), an online tool providing information on over 130 standards and other similar initiatives.

5. Which requirements must you comply with?

The European Union Timber Regulation (EUTR) is the most important requirement that you must meet. There is also the European Union General Product Safety Directive, however, which applies to all consumer products. Products that are permanently incorporated into construction works also have to comply with the Conformité Européenne (CE) requirements.

In addition, there is the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES) to comply with and the European “Registration, Evaluation, Authorisation and Restriction of Chemicals” (REACH) to take into account. For packaging material, you have to comply with the International Standards for Phytosanitary Measures (ISPM).

6. Which additional requirements do buyers often have?

Sustainable forest management is especially relevant to tropical timber, due to concerns about deforestation and global warming. Moreover, importing companies often need to address other issues than the origin of wood. European buyers (especially those in western and northern European countries) pay more and more attention to their corporate responsibilities regarding the social and environmental impact of their business. This aspect also affects traders and processors.

7. What are the requirements for niche markets?

Ecolabels may be important. These labels do not only focus on sustainable sourcing but also on other aspects of the products: processing (for instance, energy consumption, waste management), packaging and the use of chemicals. Smallholders and communities often face tough competition on the global timber market. The Forest Stewardship Council (FSC) has developed a “dual certification of FSC and Fair Trade” that has been tested and is available.

Country specific requirements

Various European countries have their own regulations or requirements. The following larger importing countries and their specific requirements can be identified.

Germany

General building regulation (Bauordnungsrecht). “U” mark (mandatory requirement for commercial building

products). German regulations on pentachlorophenol and formaldehyde (Chemikalien-Verbotsverordnung). Public procurement. The DIN (German Institute for Standardisation) aims to organise and moderate standardisation in Germany. It currently has 11 standards and specifications in relation to tropical timber

Belgium

Belgian building regulations. Public procurement. The Federal Government supports the certification of sustainably managed forests and will use only certified wood in its procurement procedures. The Federal Government advised the three “Gewesten” (Regions) to implement similar regulations, which they are doing gradually. The NBN (Bureau for Standardisation) aims to organise and moderate standardisation in Belgium. It currently has 24 standards and specifications in relation to tropical timber.

France

Public procurement: the French government’s public procurement policy for timber requires that all timber and wood-derived products must be from independently verifiable, sustainable sources.

AFN technical standards. AFNOR provides technical specifications for outdoor timber: NF B54-040:2010, NF B54-040/A1:2013 and NF EN 12871:2013. Specifications include product dimensions, stability and moisture requirements.

The Netherlands

Dutch building regulations (Dutch “Bouwbesluit”): products used in building projects must comply with the Dutch building regulations. Public procurement. Dutch regulations on various chemicals such as formaldehyde. The NEN (Dutch Institute for Standardisation) aims to organise and moderate standardisation in the Netherlands. It currently has 51 standards and specifications in relation to tropical timber.

8. What competition do you face on the European doors and frames market?

For a complete and detailed overview of your competition in the European market, you can read our [“Competition in the timber sector”](#) document. With regard to doors and frames, take the following into account.

Your competition is working on legality and traceability

Legality and traceability requirements are considered major barriers for exporters in developing countries. This fact is because of the potential problem with illegal timber. Nevertheless, products with less detailed specifications and less sophisticated design, such as decking, will enter the European market more easily compared to other timber products such as garden furniture. For doors and frames, the demands for legality and traceability can be strict because the products are mainly sold directly to consumers, who are often aware of deforestation problems and climate change.

Tips:

Keep up to date with market access requirements and trends, following details of developments provided by CBI.

Make sure that you work on the legality and traceability of your raw material.

Your competition is there; make sure that you stand out

Market rivalry depends on the availability of the various timber species, quality, design and prices. Tropical timber is sometimes used to make a design statement within companies, public institutions or private homes. In such cases, sustainability and design are often important, with the product ordered as a single item and in a

specific, unique size and at a higher price than for standard-sized and conventional designs.

Tips:

Make sure that you add value to your product by improving its durability, quality and design (colour of the timber) through the use of tropical hardwood species with a higher density which can be used for exterior purposes. Exporters of doors and frames can offer doors and frames both together and separately, and they offer innovative designs or the ability to meet standard specifications at competitive prices. The wide range of doors means that focusing on a price range is essential. Exporters from developing countries are advised to focus on a niche; for example, solid timber exterior or fire doors, exotic veneers and design doors, or on larger volumes with possibly lower profit margins.

Timber prices can change daily, so you depend on your buyers to stay informed on the price developments. For more general information on prices, check the [bi-monthly ITTO tropical timber market reports](#) (International Tropical Timber Organization) and the [FORDAQ](#) website.

As many retailers display their doors and frames online, verify whether your styles and price ranges match theirs. Be innovative in proposing new styles, but also be flexible if required in order to adapt to traditional styles. When aiming for specialist doors (for instance, fire or safety doors), technical specifications are critical.

Smaller, specialist suppliers, designers and architects are potential buyers and can be targeted by exporters of high-quality, innovative and contemporary designer doors and frames. Exporters that can provide technical specifications and offer guarantees may have a competitive advantage.

E-commerce competition

Online orders directly from producers (in developing countries, delivering directly with online delivery tracking) or directly from DIY retailers and wholesalers (for instance, [Rekord Online](#), [LEBO Germany](#), [Topdoors Germany](#)) are increasingly popular. Online market places such as [Alibaba](#) and [eBay](#) are also popular options for retail and wholesale. In addition, the normal retail showrooms, DIY centres, warehouses and specialist joinery businesses continue to be traditional channels.

Tips:

Online buying is increasing among household consumers and importers. As a result, it is recommended that exporters connect with suppliers who own or have access to online shops.

Using social media such as LinkedIn and Facebook can be a way to increase your market exposure. Communication can be aided by web-based call and conference facilities, such as Skype, which allow long-distance face-to-face exchanges.

Make sure to display at relevant trade fairs and on the internet, including a direct sales page on your website with appropriate direct delivery methods.

European companies are investing in your country and become competition

As a result of the decreased availability of tropical timber and the increased buyer requirements on the European market, European buyers are working towards vertical consolidation of their supply chain. Europe is

replacing part of its suppliers of tropical timber due to legality issues. They can do so by sourcing tropical timber directly in the harvesting countries, thus weakening the role of the exporter.

Vertical consolidation is currently taking place on the timber market. This development creates the need for long-term cooperation between suppliers and importers. As such, importers indicate that they are building relations with their suppliers in developing countries for many years to come and often visit the exporting companies to make sure that the operations are carried out accordingly.

Tip:

The stricter requirements of the European market create the necessity for long-term cooperation. At the same time, working together with other processors and traders will make you a more attractive supplier while reducing the costs and supplying higher volumes.

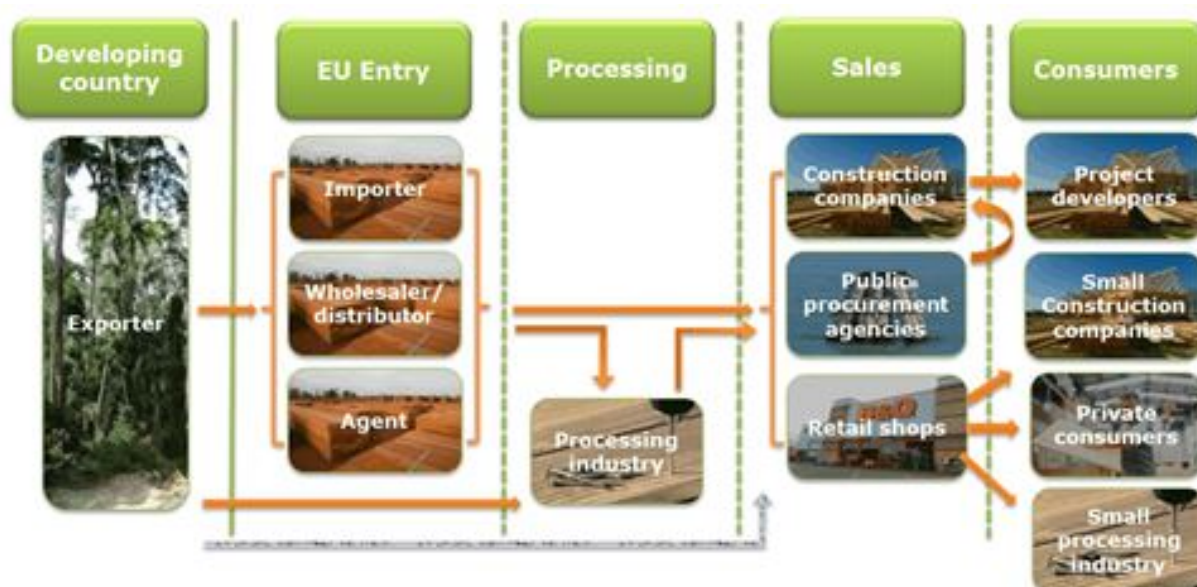
9. Through which channels can you get doors and frames on the European market?

For more general information about market segments and channels, you can have a look at the [Market Channel and Segment document](#) available on the CBI market intelligence platform.

The value chain for doors and frames does not present significant differences from the general tropical timber sector. Exporters in developing countries mostly sell their products to importers and wholesalers on the European market. The product is distributed via retailers, Do-It-Yourself (DIY) stores (such as [Homebase](#), [Praxis](#) and [Hornbach](#)) and construction companies, mostly in a finished form.

Trading channels for tropical timber products in general have changed drastically in recent years. First of all, the influence of e-commerce has shifted timber sales towards a much quicker and more open process. More importantly, legality and sustainability demands have resulted in the shortening of supply chains, thereby decreasing the number of agents active in the tropical timber trade.

Figure 7: Trade structure for doors and frames



Source: Forestry Service Group

Tips:

If you supply sustainably certified tropical timber products, the Netherlands, Belgium and Germany are the ideal countries for you to export your product. These markets offer higher profit margins on products compared to the non-certified ones.

The [Global Forest Trade Network](#), a WWF initiative which aims to connect sustainable timber exporters with European industries, can provide you with an important opportunity to connect to the right buyer.

10. What are the end-market prices for doors and frames?

There are many factors that influence the prices of timber doors and frames: availability, function (internal/external/fire resistant), species, sustainability certification, design (classic, decorative, plain and flat, with or without glass), construction (solid, veneered, panels) and volumes.

For doors and frames, part of the final value is sometimes added in Europe after import. If you see opportunities to add more value to your product before exporting (for example, by exporting more sophisticated products or better packaging), it may attract higher margins.

Tips:

Premiums are sometimes paid for products with a sustainability certificate.

Opportunities to add value include providing both frame, door and/or sills; exporting sophisticated, higher-end, well designed products; primed or stained doors to enhance durability for external use; painted or lacquered doors for indoor and outside use; and offering doors pre-assembled, as flat packs or with fittings.

Doors, frames and intumescent strips constructed from timber species that are highly fire resistant (i.e. 60 minutes or more) could be a potential niche in the fire-resistant doors and frames market.

Panel doors are generally sold at slightly lower prices than solid or engineered doors, which reflect perceptions of quality, the quantity of timber used and slightly lower costs of transport due to their generally lower weight.

Figure 8: Price breakdown of tropical doors and frames imported to Europe (excluding VAT, average 20%)








Source: FSG

Common market prices


The table below provides examples of retail prices (including VAT) in the major importing countries. Prices are separated into solid and engineered doors made from tropical timber. Prices include pre-drilled locker space. Doors are ready to paint and are usually wrapped in plastic alongside a leaflet with instructions.

Table 1: Examples of retail prices


Type of door	Timber species and remarks	Price	Size	Picture	Sold by	Country
Engineered (Meranti veneer)	Various	€ 315	1981x762mm and 45 mm thick		Direct Doors	United Kingdom
Solid Hardwood	Merbau, model Sassenheim (FSC)	€ 933	2115x880mm and 45 mm thick		Austria deuren	Netherlands
Solid Hardwood	Merbau, incl. metal and painted	€ 2665	2350x950mm and 40 mm thick		Albo deuren	Netherlands
Engineered + frame, primed for painting	Unknown (FSC)	€ 506	2074x932mm and 44 mm thick		B&Q	United Kingdom
Interior door, engineered	Sapelli	€ 266	2030x825mm and 40 mm thick		Kapitel Decor	Spain
Solid wood	Meranti, incl. glass	€ 1199	2150x900mm and 40 mm thick		Leroy Merlin	France

Please review our [market information disclaimer](#)

Follow us for the latest updates

(opens in a new tab)  [Twitter](#)

(opens in a new tab)  [Facebook](#)

(opens in a new tab)  [LinkedIn](#)



[RSS](#)