

# Exporting certified tropical timber garden furniture to Europe

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Garden furniture is a popular product group in Europe and can provide opportunities to exporters in developing countries. After the economic recession, the European market for garden furniture has improved again. You can conquer the market by adding value through sustainability certification, the use of beautiful hardwood species, a unique design and competitive pricing. The use of lesser-known tropical timber species can be an advantage as well.

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## 1. Product description

This product fact sheet covers certified garden furniture made from tropical wood species. Garden furniture articles refer to benches, dining chairs and tables, lounge beds, rocking chairs, tennis benches, bistro sets, deckchairs, director's chairs, beach chairs, tree seats, small tables and swing seats. With the occasionally harsh climates in Europe, these products are often made from durable hardwoods with a high density.

Figure 1: Examples



For the classification of garden furniture, the Eurostat Prodcod system is used. The following product codes are used: 3100.1290 “Non-upholstered seats with wooden frames” and 3109.1300 “Other wooden furniture”.

Please note that trade data are not available for garden furniture specifically made of tropical timber species. As a result, the data analysis is based on figures for the trade of “wooden garden furniture”.

## 2. Product specifications can be separated into the following characteristics:

### Quality

Quality in garden furniture largely depends on the target country and is mostly addressed through the quality and thickness of the timber. Lower quality is often sold in the Netherlands, Belgium and France, while higher quality is offered in Scandinavia, Germany and the United Kingdom. In general, however, the timber is without visible defects. Furthermore, the following aspects are important:

**Species and raw material.** Use suitable species; durable hardwoods are needed for garden furniture. Use wood species with a density of between 600 and 900 kg/m<sup>3</sup>. Make sure that you use sawn timber that is “quarter sawn (radially)”, which means that the short grain is showing. This method greatly reduces the chance of splitting and warping, and produces less stress in the timber later on. Also make sure that you use timber with identical colours, certainly within the same piece of furniture or the same set.

**Proper joinery.** You have to use mortice and tenon joints which, if machined to the correct tolerances and secured with dowels of the same wood, produce a very strong, durable joint that does not need glue to add strength. Do not use screws; they create high stress points, which in due course lead to cracking of the wood or the screw and failure of the joint. Proper joinery also means that all parts and components must fit together closely.

**Fittings and fastenings.** Many models of garden furniture have adjustable backrests, fold-up systems and moving parts. These items create the need for metal fittings, hinges, swivel points, and so on. Brass is usually used for the exposed ends of these fastenings because of its looks and corrosion resistance. In some weight-bearing points, however, brass is not strong enough. In these positions, you should use stainless steel. Take your time to find the right supplier for these items.

**Construction and measurements.** How thick are the legs and the seat slats which are going to take the weight of people of all sizes sitting on them? Some wooden garden furniture is lightweight and therefore looks rather flimsy. It is much cheaper to make garden furniture with thinner sections of timber, but it may not stand the rigours of the European climate and the years of wear and tear. Preferably, R3 is used for rounded corners.

Figure 2: Combination of timber and metal



Kiln-dried percentage (KD). As a European average for products used outside, 14% (+/- 2%) moisture content has to be guaranteed.

General size tolerance. Depending on the species and size of products, a maximum of 0.3% is normally used due to expanding and shrinking of hardwoods. The 0.3% tolerance is the maximum (also for bending), which means that timber has to be dried properly and moulded with sharp knives.

## Finishing

Sanding and oiling. In many cases, producers use P220 sandpaper first and then brush natural oil onto the furniture. After drying, you can sand the oil into the surface with P400 sandpaper and end up with a very smooth finish. Make sure always to sand in the direction of the grain pattern.

Tropical timber garden furniture is commonly treated with oil. Advantages of treating the wood with oil include the enhanced appearance of the natural colour of the timber. Additionally, when the oil is used to seal the pores, the timber is protected from weather conditions including UV rays, water and frost, splintering, dust, moulds, insects, and so on.

## Main species and colours

In general, the European consumer likes to have red-brown coloured garden furniture. This colour is associated with durable wood by the consumer and that notion will not be easily changed. The precise species is not that important for the consumer, although it naturally is for the shopkeeper who likes to sell wood that can indeed survive the climate in Europe.

### Tip:

Try to use Lesser-Known Species (LKS). If you can prove that your species are as good as the more common species, there are promising exporting opportunities. Refer to the [FSC Guide to Lesser-Known Tropical Species](#) to find out which lesser-known species are suitable substitutes for garden furniture.

## Dimensions

Dimensions depends on the type of furniture. See the final section below on prices, dimensions and examples of products.

## Types of packaging

The International Standards for Phytosanitary Measures (ISPM) apply to wooden packing materials. Products are placed on heat-treated pallets with protectors for the pallet-wrapping strips. This packaging is generally for protection rather than for marketing purposes.

Orders are usually well packed (individually in cardboard boxes), and 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.

## Labelling

Labelling depends on your buyer and your end market. In the event that your product ends up on the retail market, every label must specify the product's size, certification, species, function or building instructions (in case of prefab), and the requirements for maintenance (oiling).

## 3. What makes Europe an interesting market for certified tropical timber garden furniture?

This section provides an overview of the market for tropical timber garden furniture. Trade data on timber garden furniture are extracted from Eurostat. Please note that, because the data do not distinguish "tropical" or "certified" timber information specifically, the data presented below give a general indication of trade in timber garden furniture (both tropical and temperate species). There are basically two larger streams of garden furniture in the European market.

On the one hand, you have products that are produced in developing countries (roughly 36% of the market). On the other hand, there is garden furniture produced in factories throughout Europe and made from imported tropical sawnwood or temperate hardwoods (roughly 64% of the market).

Figure 3: Traditional bistro set with foldable chairs



Consequently, care should be taken when drawing conclusions based on the figures below. Trade data for certified products do not exist either. Nevertheless, some research has been done in a number of European countries about the levels of certified products sold on the market.

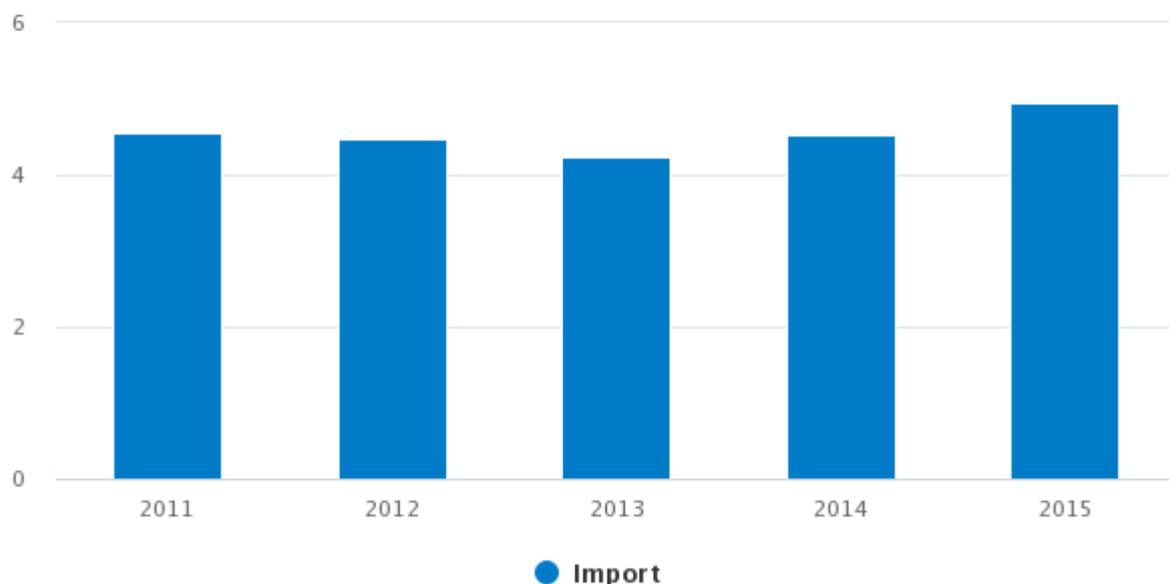
For example, in the Netherlands, 61% of all tropical timber imported in 2015 came with an FSC (Forest Stewardship Council) certificate (Source: [VVNH](#)). As garden furniture is a very visual and consumer-oriented product, it is estimated that around 75% of the tropical garden furniture is certified in the northern European countries. This process is less common in the southern countries.

## Import and export: substantial increase

The figures below present the import and export of timber garden furniture into the 28 European Union countries.

## Figure 4: Imports of timber garden furniture 2011–2015

in € million



Source: Eurostat 2016.

During the period between 2013 and 2015, imports to Europe increased rapidly. Evidence of this economic recovery is shown in the figures, resulting in an import value of € 4.954 million over 2015. As explained above, there are two streams in Europe. The graph above represents the two streams together. The import from other European Union countries is considered “local production” (garden furniture made from imported tropical sawnwood or temperate hardwoods).

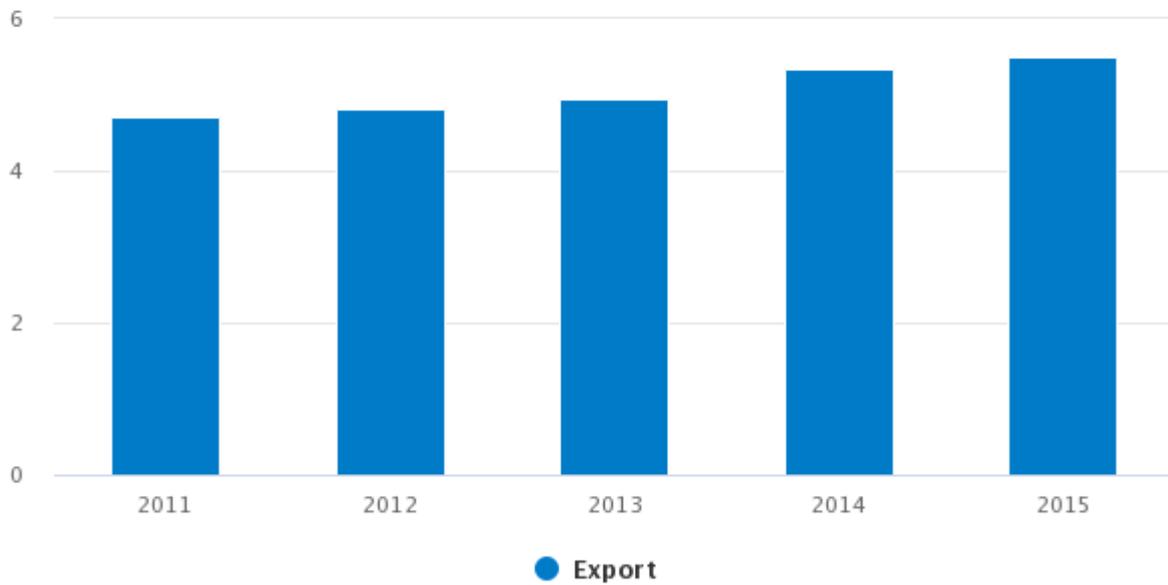
Strict implementation of the EUTR might still affect imports of tropical mouldings in the coming period, since Europe has been actively blocking imports of illegal timber as well as non-verifiable timber. In 2015, the largest importers were Germany, the United Kingdom, France, the Netherlands and Italy.

The leading suppliers from developing countries were China (€ 938 million), Vietnam (€ 324 million), Indonesia (€ 167 million), India (€ 53 million) and Malaysia (€ 49 million).

European exports increased for the fifth year in a row, amounting to around € 5.497 million in 2015. This segment also comprises two streams within Europe. The total export from European countries to other European countries in 2015 (intra-European trade and locally produced garden furniture made from imported sawnwood or temperate hardwoods) amounted to 73% of the market. The remaining 27% was exported to the rest of the world. In 2015, the largest exporters were Italy, Poland, Germany, Lithuania and Sweden.

Figure 5: Export of timber garden furniture 2011–2015

in € million



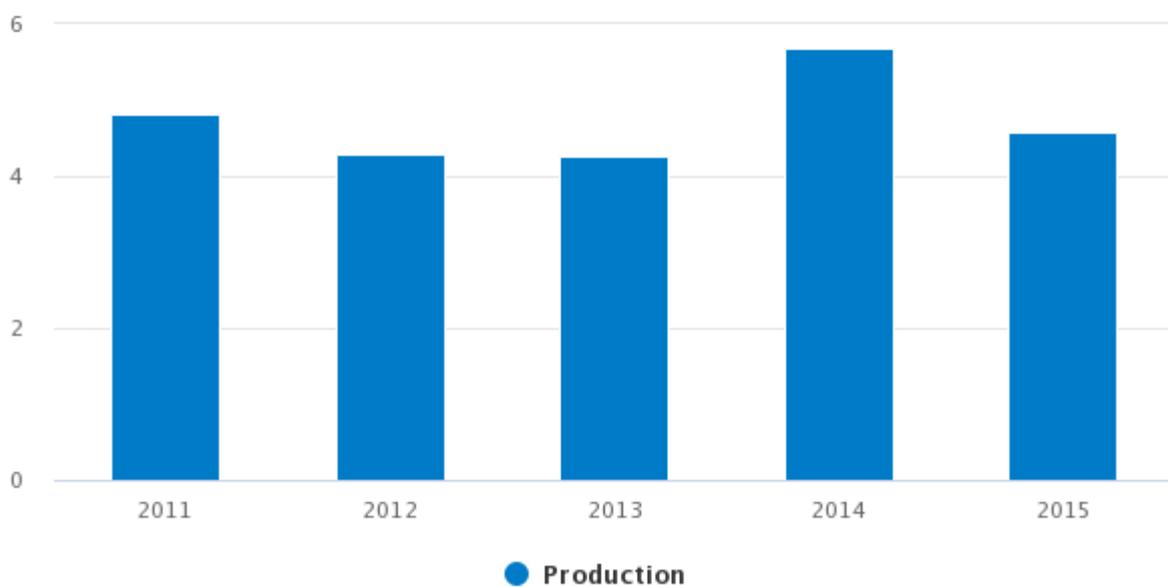
Source: Eurostat 2016.

### Production: fluctuation; consumption: no clear trend

The figures below present the production and consumption of timber garden furniture in the 28 European Union countries.

Figure 6: Production of timber garden furniture 2011–2015

in € million

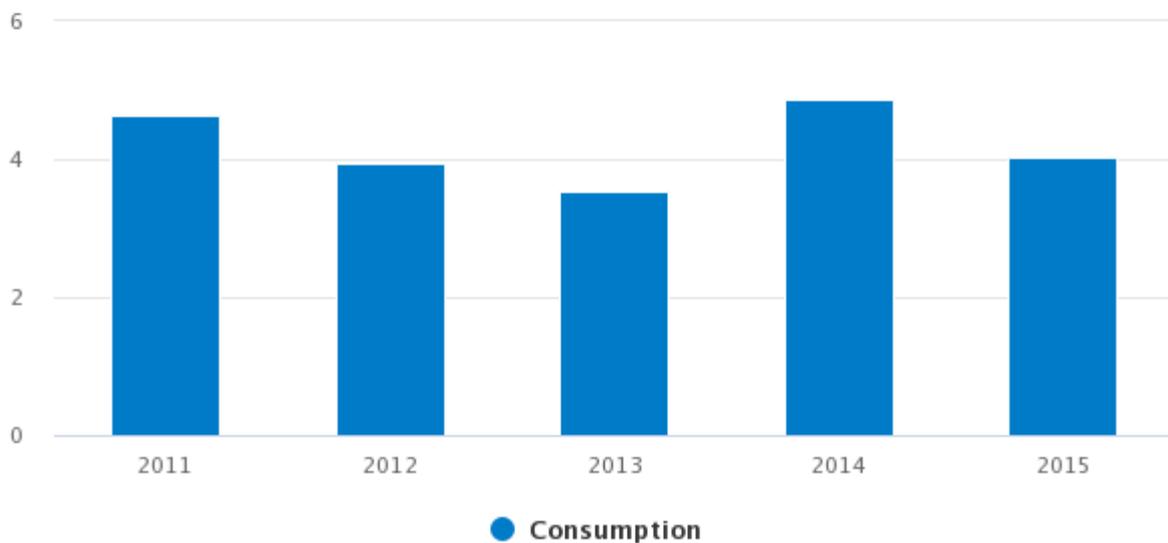


Source: Eurostat 2016.

The production of garden furniture from tropical timber is realised by importing tropical sawnwood and processing it in factories around Europe. Also included in the production figures is garden furniture made from temperate hardwood that grows in Europe.

Production figures fluctuated in the past years and reached a value of € 4.577 million over 2015. One of the reasons for the decrease in the past year is the substantial increase of imports; less is produced in Europe while more is imported. Another factor seems to be a decrease in consumption (see below). The major producing countries are Germany, Italy, the United Kingdom, France and Spain.

**Figure 7: Consumption of timber garden furniture 2011–2015**  
in € million



Source: Eurostat 2016.

The figure above presents the consumption of timber garden furniture in the 28 European Union countries. Consumption is calculated as Imports + Production - Exports. The consumption of timber garden furniture has decreased slightly, amounting to € 4.035 million in 2015. This decrease may have been caused by the bad weather in the spring and summer of 2015, as garden furniture is a strongly “seasonal” product. Another reason may be the fact that “solid’ timber garden furniture is not a trend at the moment.

Since the combination of materials (timber with metal, timber with rattan) is trendy, “traditional” garden furniture is not that popular. Nevertheless, GDP and consumer confidence are expected to increase further in 2016. This development will further positively affect consumption, which is closely connected with the developments in the consumer and garden sector. In 2015, the largest consumers were the United Kingdom, Germany, France, Spain and the Netherlands.

### 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.

## 4. Which trends offer opportunities on the European market for garden furniture from certified tropical timber?

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 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, mouldings 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 products, which are often mass-produced in eastern Europe, is difficult. Wood-look recycled plastic (for example, [Polywood](#)) and bamboo are some of the materials that are marketed as close substitutes of tropical timber. Nevertheless, the durable and strength-inherent quality of tropical timber is often hard to surpass.

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 important 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 the 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. The promotion of lesser-known species is important. The scarcity of well-know/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 0.84 in September 2017. 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.

## **5. Which requirements should garden furniture from certified**

## tropical timber 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.

### 6. 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 Européene (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).

### 7. 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.

### 8. 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 only use certified wood in its procurement procedures. The Federal Government advised the 3 “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.

## 9. What competition do you face on the European market for garden furniture from certified tropical timber?

For a complete and detailed overview of your competition on the European market, you can read our "[Competition in the timber sector](#)" document. With regard to mouldings, 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 problems 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. As to garden furniture, 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. The wide range of garden furniture means that focusing on a price range is essential. Exporters from developing countries are advised to focus on a niche; for example, the high-end market. You should also realise that the current trend prescribes a combination of materials.

Timber prices can change daily, so you depend on your buyers to stay informed of 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 furniture 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.

Smaller, specialist retailers can be targeted by exporters of high-quality, innovative and contemporary designer furniture.

## 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, [Argos](#), [Garden Furniture 4u](#), and [Overstock](#)) 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 garden centres 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 exhibit 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.

## 10. Through which channels can you get garden furniture from certified tropical timber on the European market?

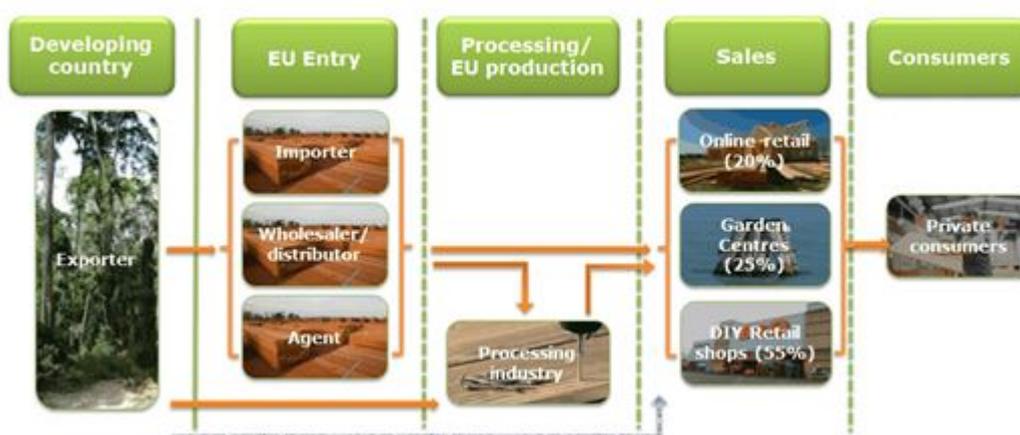
For more general information about market segments and channels, you can have a look at the [Market Channel and Segment document](#) available on the CBI market intelligence platform.

The value chain for garden furniture 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 [B&Q](#), [Homebase](#), [Praxis](#) and [Hornbach](#)) and specialist companies, mostly in a finished form.

Please understand that a substantial part of the market (64%, see the statistics section above) is produced in Europe, made from imported tropical sawnwood and temperate hardwoods. The remaining 36% is garden furniture actually produced in the developing countries. Around 75% of all tropical garden furniture is FSC certified.

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. About 55% of the garden furniture is sold by the DIY stores, 25% by specialist garden centres and 20% online.

Figure 8: Trade structure for garden furniture



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 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.

## 11. What are the end-market prices for garden furniture from certified tropical timber?

There are many factors that influence prices of garden furniture: availability of species, popularity of species (demand), moisture content, durability class/grade, colour consistency, sustainability certification (FSC), innovative design, combination of materials and appearance of the timber (clear grain, good machining properties, staining, finishing properties).

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.

Focus on the high-end quality market, as you will not be able to compete with Asia. Timber garden furniture has a standard design, but by focusing on special finishes and hand-carved details, your exports can become distinguished and unique. More sophisticated products can translate into higher profit margins.

Hardwood reflects perceptions of quality in Europe, so use your species well! Timber garden furniture is used outdoors. As a result, marketing techniques that emphasise your product's qualities regarding durability, resistance against moisture, fungi, insects and breakage should work for you! Normal 0 21 false false false NL X-NONE X-NONE /\* Style Definitions \*/ table.MsoNormalTable {mso-style-name:Standaardtabel; mso-tstyle-rowband-size:0; mso-tstyle-colband-size:0; mso-style-noshow:yes; mso-style-priority:99; mso-style-parent:""; mso-padding-alt:0cm 5.4pt 0cm 5.4pt; mso-para-margin-top:0cm; mso-para-margin-right:0cm; mso-para-margin-bottom:10.0pt; mso-para-margin-left:0cm; line-height:115%; mso-pagination:widow-orphan; font-size:11.0pt; font-family:"Calibri","sans-serif"; mso-ascii-font-family:Calibri; mso-ascii-theme-font:minor-latin; mso-hansi-font-family:Calibri; mso-hansi-theme-font:minor-latin; mso-fareast-language:EN-US;}

Figure 9: Price breakdown of garden furniture imported into 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. The focus is on high-end quality furniture made from tropical timber.

Table 1: Examples of retail prices

| Type of furniture                  | Timber species and remarks       | Price   | Size or parts                                  | Picture  | Sold by                | Country        |
|------------------------------------|----------------------------------|---------|--|--|------------------------|----------------|
| Two-piece small dining set         | Teak                             | € 923   | 1 x 1.5 m bench, 2 chairs, 1 table             |    | Garden Furniture 4u    | United Kingdom |
| 10-Chair Extending Set             | Teak                             | € 3,795 | 10 chairs, 1 table 2.6 m                       |    | Garden Furniture Spain | Spain          |
| 6-Seater Patio Set                 | FSC Eucalyptus                   | € 649   | 6 foldable chairs, 1 table (150 cm), 1 parasol |   | Argos                  | United Kingdom |
| Garden chair                       | FSC Guariuba                     | € 695   | 1 chair 72 cm in width                         |  | Vondel                 | Netherlands    |
| Combined material small dining set | FSC Acacia (temperate hardwoods) | € 199   | 2 chairs, 1 table 120 cm                       |  | Otto                   | Germany        |
| Garden table, combined with rattan | Plantation Teak                  | € 441   | 1 table 240 cm                                 |  | La Redoute             | France         |

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