



CBI
Ministry of Foreign Affairs

CBI Product Factsheet:

Tropical timber doors and frames in France

Introduction

The French market for tropical timber doors offers great opportunities to exporters in developing countries (DC). Despite the downturn in the construction market, French imports of tropical timber doors increased significantly for 2013. DC exporters are recommended to offer sustainably certified doors and frames with a unique design. Finished products offer higher profit margins, while online purchasing will give you the opportunity to target higher segments of the French market.

Product definition

This Product Factsheet covers doors, door frames and thresholds made from tropical wood species. This includes products for exterior and interior use, including flush and sliding doors. Doors and frames can be either solid or composed of veneer and laminate.

Classification of tropical timber doors and frames:



Harmonised System (HS) Within the EU / EFTA, the following HS code is used to indicate trade in doors and frames of tropical timber:

- 4418.2010: Doors, their frames and thresholds

Product specification

This section gives an overview of the main technical characteristics for doors and their frames in the French market:

Dimensions:

Standard dimensions for doors include 762 mm x 981 mm and 838 mm x 1981 mm. Corresponding frame sizes are 2079 mm and 2091 mm, 856 mm and 932 mm. Six door widths are common: 610, 686, 762, 813, 826 and 838 mm, while thickness is usually 35 mm or 44 mm.

Construction methods:

Common construction methods include engineered timber doors (manufactured by binding together wood strands, fibres, or veneers with adhesives to form a composite material, often lighter than solid timber) and solid timber doors, (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). Hardwood 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 (L.V.L)). A wide range of both solid, engineered, panel and veneered doors are sold in France. 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.

Product information:

Door characteristics must specify the product's size, species, function, and the way(s) the door can open. Also, there should be an indication of whether the door is glazed or non-glazed as well as its thermal efficiency.

Finishing:

Doors and frames are sold both finished and unfinished. Typical finishes offered by wholesalers in the French include primed (cream colour), and hardwood with basecoat stains, making the door suitable for site finishing. Doors for external use are often offered primed. For retail sale doors can be offered unfinished, primed, stained, lacquered or painted.

Weight and transport:

For their transportation, doors are stored in dry cargo containers of 20ft GP or 40ft GP. For high density wood 20ft GP containers are recommended, since a 40ft GP will be half empty due to weight restrictions. Storage 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. 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.

Examples of door packaging



Source: Fordaa.com

Packaging:

Minimum packaging standards are specified in [EU Directive 94/62/EC](#), which aims to balance environmental and free trade within the EU market. 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 and not for marketing purposes.

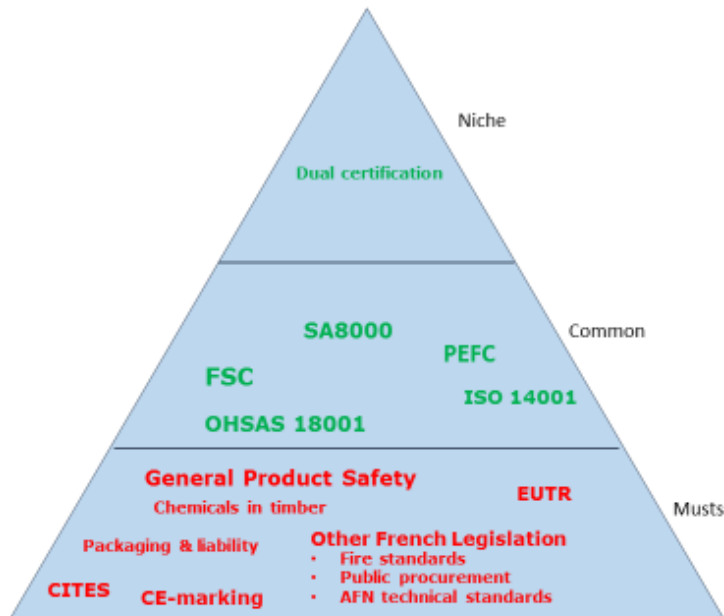
For more product characteristics, see the [CBI Timber product sheets: Doors](#).

Buyer Requirements

EU legislation

Most legislation concerning imports of tropical timber to European Union countries is harmonised as indicated below. Regulations that apply specifically to France are also mentioned in the sequence.

Figure 1: Buyer requirements



Requirements you must meet

General Product Safety

The [General Product Safety Directive](#) applies to all consumer products. The obligation to comply will be primarily the responsibility of the EU companies that place the finished product on the market. However, they will often ask their suppliers to comply with the given requirements.

Tip:

- To get a better understanding of reasons behind the confiscations of products by EU customs authorities, refer to the EU's [RAPEX database](#). Try and identify the most common forms of non-compliance by suppliers to the EU and evaluate your own risks. This strategy can serve as a basis for you to correct any supply inconsistencies before accessing the EU market, thus avoiding rejection at the border.

CE marking for timber products used in construction

Timber or timber products that are permanently incorporated into construction works (e.g. windows, doors, flooring) will have to be CE-marked. The CE marking demonstrates that the products comply with harmonised requirements regarding mechanical resistance, stability, safety in case of fire, hygiene and the environment. Since July 2013, manufacturers of finished construction products need to provide a [declaration of performance](#) (DoP). The CE requirement applies to you only if you are a DC supplier of finished doors and frames to the EU. As a supplier of parts, you will only have to provide information about the essential characteristics of your product to your buyer.

Tips:

- For an explanation of what the essential characteristics of construction products are, refer to Chapter 1.3 of the [Manufacturer's Guideline on the Construction Product Regulation and its Implementation](#).
- For an example of a declaration of performance refer to the website of Swedish timber supplier [Wood Support](#).
- To read more about [CE marking of construction products](#), refer to the EU Export Helpdesk.

EU Timber Regulation (EUTR)

Controlling the legal origin of timber:

All timber imported into the EU must come from verifiable legal sources. EU buyers that place timber or timber products on the market must demonstrate [due diligence](#). In addition, the EUTR requires operators to trace their products back to the source. This means that when suppliers supply legal timber, but cannot provide well-documented guarantees of legality, they will not be able to access the EU market.

The EUTR is part of the Forest Law Enforcement, Governance and Trade (FLEGT) Action Plan. The plan also includes the Voluntary Partnership Agreements (VPAs). These are voluntary trade agreements between the EU and timber exporting countries. If a country implements a national licensing scheme, all timber exported from that country is considered legal. Other ways to prove compliance is through [voluntary legality verification systems](#) and sustainable forest management certification.

Tips:

- If you aim to sell / continue to sell to the EU market, keep in mind that legality assurance is an essential aspect of trade together with price and quality. For more information, refer to the [Guidance Document for the EUTR](#).
- Due to the recent introduction of the EUTR, there are still uncertainties about its impact and consequences. For more information on the possible scenarios of the implementation EUTR, refer to the CBI document [Impact of the EUTR for SME timber exporters from developing countries](#).
- For more information about VPAs and about your country's progress in achieving the VPA process or FLEGT, refer to the [FLEGT Voluntary Partnership Agreements](#).
- The EUTR only tackles the problem of timber legality, but it does not directly address the problem of sustainability. Refer to 'Common requirements' for more on sustainable forest management.
- Read more about [control on illegal timber and timber products](#) on the website of the EU Export Helpdesk.

Current state of affairs

The implementation of the EUTR is still in its infancy. In many EU Member States, the monitoring of trade in illegal timber is still in development. On the supply side, there are already 6 countries in the final stage of implementing a VPA-agreement and 9 other countries that are still in the negotiation phase. None of the countries has finalised the VPA-process yet. Therefore, since the implementation of EUTR, no FLEGT-licensed timber has yet entered the EU market.

Regardless of these shortcomings, most large and professional buyers comply with the requirements of the EUTR and are asking their suppliers to demonstrate the legal origin of timber. Compliance is especially common in North and West EU countries, where there is a strong commitment to legality and sustainability. However (smaller) buyers in these regions can also be less pro-active and not fully compliant.

What has happened since the implementation of the EUTR is that the supply chain of timber has become more transparent. It has already resulted in major improvements in the legality controls and overall environmental and social performance of timber and forestry industries. The EU is gradually moving toward a stricter implementation of the EUTR, but it is not clear what the timescale for this will be.

Tips:

- The [European Timber Trade Federation](#) and [EU FLEGT](#) facility provide regular updates about the status of the implementation of the EUTR.
- With regard to establishing long-term business relations, suppliers are advised not to wait for the EUTR and FLEGT-system to be fully up and running, but to be pro-active and ensure full transparency and legal sourcing and take measures if necessary.

CITES

If you are supplying endangered timber species listed by CITES (International Convention on Trade in Endangered Species), you will have to obtain a CITES permit. With a CITES permit, you automatically comply with the requirements of the EU Timber Regulation (EUTR) and your timber will be considered legally harvested.

Tip:

- To check if your timber is included in the CITES-list, refer to Annex A, B and C of the [CITES-Regulation](#). As the list is regularly updated, make sure to refer to the most recent version of the Regulation (see under consolidated version).

Chemicals in timber

The preservatives arsenic, creosote and mercury are often used to prevent rot and improve the durability of timber, especially for products destined for outdoor applications. The EU does not allow the use of these preservatives, except for products such as wood used in industrial installations or as railway sleepers. There are also restrictions for wood (e.g. doors, window frames, and floor parts) treated with certain oils, glue, varnishes and lacquers that may contain harmful substances. For example, painted articles must not be placed on the market if the concentration of cadmium is equal to or greater than 0.1% by weight of the paint on the painted article.

There are also restrictions set by the EU for the use of chemicals in processing. The **EU REACH** (Registration, Evaluation and Authorisation of Chemicals) regulation sets requirements for the use of products such as oils, varnish and lacquer that may contain harmful substances. Doors and frames treated with certain substances may not be imported.

This legislation does not apply outside the EU, but buyers are increasingly implementing sustainable practices in their own companies and in their supply chains. Therefore, they can ask you to also comply with these requirements regarding the use of chemicals during processing and production (e.g. volatile organic compounds [VOCs] used in coatings, formaldehyde and Pentachlorophenol).

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Tips:

- For more information, refer to the guidance notes on [creosote](#) and [arsenic](#) published by the Timber Trade Federation.
- Ask buyers whether they have specific policies concerning chemicals and what their specific requirements towards suppliers are.
- Refer to the [EU website on reduction of emissions and substitution of solvents](#) to learn more about how to reduce VOCs.
- Check the [CBI document EU legislation: Chemicals REACH](#) to determine how REACH affects you.
- To find out more about restrictions on specific substances refer to Annex XVII of [Registration, Evaluation and Authorisation of Chemicals \(REACH\)](#). In addition, refer to the website of the EU to read more about REACH.

General requirements on packaging and liability:

Note that there is also general legislation on [packaging](#) (including ISPM 15 measures for wooden packaging) and [liability](#) that apply to all goods marketed in the EU.

Other French legislation:**Fire standards:**

Entrance doors for certain public buildings need to meet fire safety conditions NBN EN 13501-1 - Classification Of Goods And Construction Elements - Part 1: Classification From Data Test Reaction To Fire NBN S 21-202 - Fire Safety In Buildings - Buildings Students - General Conditions (1980) NBN S 21-204 - Protection from Fire in Building - Building Facilities - General Conditions (1982), DIN EN 13501-2 or NBN 713-020. Fire resistance requires certification by the Benor technical approval ATG (AR Standards Base 07-07-1994 amended by the Royal Decree of 19-12-1997, 4 April 2003 and 13 June 2007.

Public procurement:

Around 25% of French consumption of tropical timber is via public procurement. The French government's public procurement policy for timber requires that all timber and wood-derived products must be from independently verifiable legal and sustainable sources; this can include a licensed Forest Law Enforcement, Governance and Trade (FLEGT) partner. Documentation will be required to prove this. Certification schemes such as PEFC are acceptable as providing proof. Timber that only meets the legality criteria will be accepted in very special cases only. The policy is mandatory for all central government departments, executive agencies and non-departmental public bodies. Local authorities, other public bodies and the private sector have been encouraged to adopt sustainable timber procurement policies too.

Tip:

- DC exporters of tropical timber doors and frames who want to supply the French government departments must demonstrate that their tropical timber has been sourced sustainably. For more information, refer to French [Government's public procurement policy](#).

AFN Technical standards:

The [French Association for Standards \(AFNOR\)](#) provides technical specifications for doors and Interior Door Wooden Blocks: NF P 23 311:2012, NFP 23 304:1984, NFP 23 302:1983, NFP 23 303:1984, NFP 23 301:1987. For [interior framed doors](#) and flush doors and [exterior doors](#), standards relate to flatness, resistance to moisture, quality of finish, shock, stability, insulation, drying controls, conservation, burglar resistance and environmental performance.

Common requirements

Corporate responsibility

Companies are also addressing issues other than the origin of wood. EU buyers (especially those in western and northern EU countries) are increasingly paying attention to their corporate responsibility regarding the social and environmental impact of their businesses. This also affects traders and processors. Important issues are respect for indigenous rights, owner's rights, environmental performance, respecting labour laws and healthy and safe working conditions. Many European companies in the timber sector have policies addressing these issues. For example, companies may ask their suppliers to address sustainability issues. Suppliers may be asked to abide by a code of conduct or to sign supplier declarations to ensure compliance with applicable local laws and regulations, industry minimum standards, the [International Labour Organisation \(ILO\)](#) and UN Conventions.

Tips:

- Train your workers in how to increase efficiency and to reduce waste and emissions. For more information on these aspects, read [Wood processing and furniture making: Cleaner production fact sheet and resource guide](#).
- Refer to the factsheet [health and safety management](#) in the woodworking industry by the Building and Woodworkers International Association (BWI).
- Refer to the [Less Dust Guide](#) from the European Federation of Building and Woodworkers to reduce wood dust in the workplace.
- Ask your EU buyer about their supplier policy with regard to labour standards. Do not forget to find out how these standards are monitored and/or evaluated.
- Investigate the possibilities for implementing sustainability certification for continuous process improvement: [ISO 14000](#) (environment), [OHSAS 18001](#) (health and safety) and [SA8000](#) (labour standards) are some specific examples of such certifications.

Sustainable forest management

Sustainably-produced timber goes much further than legality aspects. Sustainability encompasses elements relating to ecological, economic, social, growing and harvesting qualities of the management.

Sustainable forest management has become commonplace in the market for non-tropical timber. Although the share of certified timber is growing, the market for tropical timber is advancing at a slower pace. At the same time, sustainable forest management is especially relevant for tropical timber due to concerns about deforestation and global warming.

There are two main certifications covering sustainable forest management: [FSC](#) and [PEFC](#). At the moment, FSC is the most widely used scheme for certification of tropical timber forests. The market share of timber and timber products from sustainable sources is high, especially in North and West EU markets. However, the share is lower for tropical timber than for non-tropical timber, as price premiums that are necessary to cover certification costs are not always paid.

Tips:

- To get a better understanding of what sustainable forest management is, refer to the principles and guiding criteria of [FSC](#) and [PEFC](#).
- Please be aware that, as a supplier of sustainably certified timber, you will need to acquire a Chain-of-Custody (CoC) certificate. As such, make sure to only target buyers that have a CoC certificate. Non-certified buyers are not allowed to sell certified timber.
- Find out what is necessary for CoC certification. The website of the Global Forest & Trade Network (GFTN) provides a [roadmap](#) to certification.
- To find European or local buyers (e.g. importers, processors and retailers) and suppliers of certified timber and timber products, refer to the [FSC Global Marketplace](#) and [PEFC database](#).

Standards Map of the ITC

Check the International Trade Centre's [Standards Map](#), an online tool that provides comprehensive information on over 130 voluntary sustainability standards and other similar initiatives covering issues such as codes of conduct relevant to your product, reviews the main features of the selected standards and codes and compares standards' requirements side-by-side. Furthermore, you can assess your company's performance against standard requirements in a self-assessment module and generate your own company's 'sustainability diagnostic report', which you can then share with the business community. Check the [standards map videos](#) to see how the Standards Map can help you to determine which initiatives may be useful for you.

Niche requirements

Dual certification (FSC and Fairtrade)

Smallholders and communities often face tough competition in the global timber market. FSC is looking to differentiate products from communities and smallholders in the marketplace. Dual certification of FSC and Fairtrade is therefore currently being tested. In addition to sustainable forest management practices (FSC), extra attention is given to the social conditions in the producing areas (Fairtrade). FSC/Fairtrade timber is sold with a Fairtrade premium that provides a 10% added value to wood bought from the certified smallholder communities.

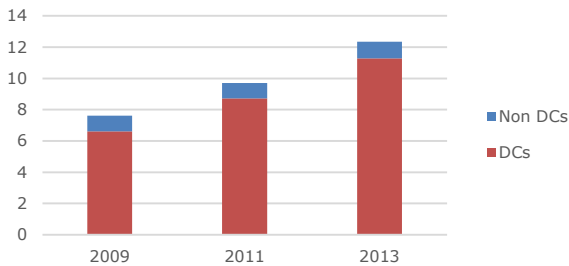
Tip:

- The [website](#) of FSC has more information about dual certification.

Trade and Macro-Economic Statistics

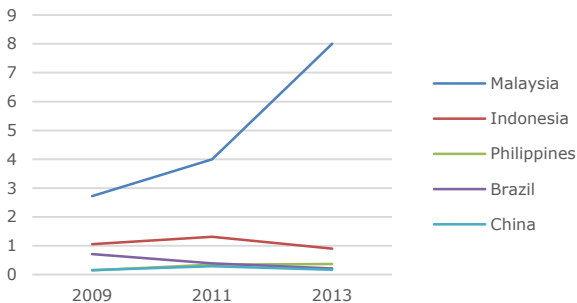
This section presents an analysis of the door and frame market in France. Trade data on imports of tropical timber doors and frames are extracted from Eurostat

Figure 2: French imports of tropical timber doors and frames, from DCs and non-DCs, in € million



Source: Eurostat (2014)

Figure 3: Leading DC suppliers of tropical timber doors and frames to France, value in € million



Source: Eurostat (2014)

Significant increase in imports of tropical timber doors and frames

During the period between 2009 and 2013, French imports of tropical timber doors and frames increased considerably, amounting to more than € 12 million in 2013. This development demonstrates that France is a large market for tropical timber products such as doors and frames.

It is interesting to note that in 2013, imports from DCs represented more than 95% of the total imports directed to the French market. Since 2009, Malaysia has grown to be the most important source of tropical doors and frames, supplying the French market with more than 74% of the total French imports. Other DCs include Indonesia, the Philippines, Brazil and China. Finally, Spanish and German exports directed to the French market represent a small share of the tropical timber doors and frames that have been re-exported (4.7%).

Tip:

- GDP & consumer confidence are expected to increase in 2015. The French market for doors and frames will also be affected positively by this development. Consequently, opportunities will arise for exporters in DCs.

Market Trends

Sustainability:

The introduction of the EU Timber Regulation to block illegal timber from entering into the EU market is increasing the market share of sustainable timber. EUTR has been fully incorporated in EU policies, but the level of implementation depends on the individual Member States. Until recently, the French parliament had not discussed the implementation of EUTR, even though France is one of the sustainability drivers in the EU. Nevertheless, product certification is increasingly being used to demonstrate legality of timber products. Certification is also used to distinguish products by demonstrating their reduced social and environmental impact on the supply chain. FSC and PEFC are the most widespread instruments used to comply with this regulation. France is one of the major markets for sustainably sourced tropical timber in Europe. Public sector sustainable procurement policies as well as voluntary industry-led initiatives have led to a growing share of certified timber doors and frames in the French market.

Tip:

- It is recommended that you contact importers or buyers with a chain of custody (CoC) certification. To find certified timber buyers, check out the FSC certificate database and global marketplace, PEFC database and FORDAQ.

Social media and E-commerce:

E-commerce is becoming increasingly popular among French consumers. Buyers appreciate a well-structured website with a clear indication of the products available, together with pictures and the technical specifications. Also, French buyers often appreciate promotional materials such as leaflets or brochures and business cards in French or English. Finally, online orders from retailers and wholesalers directly from developing countries are becoming more and more prevalent. A very successful example is Alibaba, an online market place both for retail and wholesale purchases.

Tips:

- The ability to show examples of previous high quality work (i.e. good quality video or photos on a website) and references can be an important selling point.
- Using social media such as Linked-in, Viadeo, Badoo, Skyrock, Myspace and Facebook can be a way to increase your market exposure. Communication can be aided by web-based call and conference facilities, such as webinars and Skype, which allow long distance face-to-face exchanges.

Unique versus standardisation:

Tropical timber doors may be used to make a design statement, such as one-off, design doors for companies, public institutions or private homes. For example, there are French doors available that are individually made to ensure that original features are authentically reproduced. In such cases, sustainability and design are often important, with the door ordered as a single item, in a specific, unique size and at a higher price than for standard sized and conventional designs.

Tip:

- Make sure you provide a variety of designs of doors and frames in order to attract diverse consumer groups. Offering a possibility of custom designed doors and frames, where the consumer determines some features of the design, could prove very popular in the French market.

Energy saving regulations:

Energy saving regulations are expected to influence the construction industry in France, providing an opportunity to suppliers of energy efficient doors and frames.

Tip:

- When aiming to provide specialist doors, e.g. energy efficient and fire resistant doors, meeting technical specifications is critical.

Market Channels and Segments

Channels

Exporters of tropical timber doors and their frames in developing countries (DC) mostly sell their products to importers and wholesalers in France (the role of the agent as an intermediary is decreasing). Although less common, direct trade with end-use segments (i.e. construction companies, public procurement agents and retailers directed to the consumer market) is an option for some exporters. This option is gaining more importance, mostly due the increasing demand for timber legality.

Doors and their frames are distributed via retailers, namely processors, small contractors and DIY stores, either in a finished form or in a semi-finished form (e.g. without finishing).

Market channels and segments for tropical doors and their frames do not differ from the general market channels and segments of the timber sector. For more information, please refer to the [Market Channels and Segment document](#) available on the CBI market intelligence platform.

Segments

In the European market for tropical timber doors and frames, there are mainly two segments, namely the construction sector and the consumer market. Due to the economic recession and its impact on the construction sector, consumers moved away from constructing new houses towards renovation. Consumers in Europe are increasingly renovating their houses themselves, resulting in an increased popularity of finished and ready-to-apply products. Therefore, the consumer segment offers more opportunities for exporters of tropical doors in DCs.

Price

Prices for doors vary widely from € 100 to over € 500, reflecting the numerous designs and different quality variations offered, examples of which are indicated in Table 1. The cheapest interior doors are often hollow core or softwood with a cardboard baffle centre and a hardwood veneer or panel finish. They are generally of low quality with little sound-proofing and low warmth insulating properties, suitable only for interior use and low people traffic areas. Higher price doors are often solid or engineered with higher quality design and craftsmanship. Exterior doors are generally solid wood.

As Figure 4 indicates, 35% (25% import plus 10% retail) of the final value of timber doors in the European market is added after import.

There are several factors that influence the price of tropical doors and their frames. The most important include:

- Availability: If the species are readily available or there is limited availability.
- Function: Internal doors sold with thin panels and veneers are cheaper than external, fire-resistant doors with thicker veneers.
- Quality: Quality is a critical element of price in France and Europe in general.
- Sustainability: certified products usually are more expensive.
- Volume: Prices terms may be favourable for larger orders.
- Species: Quality doors can be sold by species in France (acajou, mahogany, ebony etc.) or only with the 'tropical timber' indication. Indicating the specific species for the manufacturing of your product can increase its value.

Tips:

- The wide range of doors suggests that it is essential to focus on a price range. Since competing with the mass produced cheaper doors from Eastern Europe is often difficult, DC exporters are advised to focus on the higher segments of the market. This could refer to solid timber, exotic veneers, and design doors.
- Opportunities to add more value before export could suggest higher profit margins. Opportunities to add value include providing both frame, door and/ or sills; exporting sophisticated, higher end, well designed products; priming or staining doors to enhance durability for external use; painting or lacquering doors for indoor and outdoor use; and offering pre-assembled or flat pack doors, 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 door and frame market.

Figure 4: Price breakdown of tropical timber doors and frames imported to France

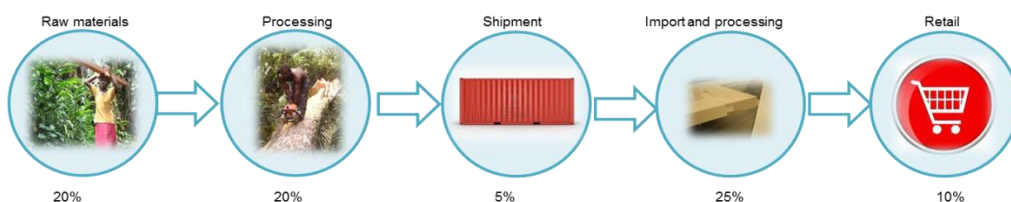


Table 1: Examples of retail prices (consumer prices excluding 20% VAT)

Price range	Door type	Dimensions
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€ 69 - 140		Function: Interior door Species: Sapelli or Sapele (tropical Africa) Dimensions: 42000 x 800 x 42 mm Certification: -
€ 90		Function: Interior door Material: Composite wood Dimensions: 204 mm x 72 x 40 mm Certification: FSC certified
€ 155		Function: Exterior door Material: MDF Dimensions: 2040 x 730 x 28 mm Certification: PEFC certified
€ 275		Function: Exterior door Species: Meranti (Southeast Asia) Dimensions: 218 x 98 cm
€ 599		Function: Exterior door Species: Meranti (Southeast Asia) Dimensions: Frame: 46 x 59 mm x 46 mm opening

Useful sources

- The [French Timber Federation](#) and [French Timber Association](#) (see [European Business Landscape](#)) have a member section where possible buyers can be identified
- EU Expanding Exports Helpdesk - <http://exporthelp.europa.eu> - go to 'trade statistics'.
- Eurostat - <http://epp.eurostat.ec.europa.eu/newxtweb> - statistical database of the EU.
- For trade, choose 'EU Trade Since 1988 by HS2, 4, 6 and CN8'.
- For instructions, see '[Easy Comext user guide](#)'
- Register for the International Trade Statistics site - <http://www.trademap.org>



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