MARKET UPDATE

It has been a particularly busy start to the New Year for the European office with three major promotional events in January, two in Spain and one in Germany. We took the extraordinary Legacy collection to the International Furniture Fair in Köln to promote red oak, which was also the theme for the young designers’ competition for Madrid Design Festival two weeks later. At the same time in Madrid, AHEC presented a new configuration of the modular tulipwood CLT structure, MultiPly, which has attracted huge media interest.

January also saw the departure of the UK (finally) from the EU. It is not clear yet what the future trading relationship between the two parties will be, but with the UK Government stating that the transition period will not be extended beyond Dec 31st 2020, the pressure is on to strike a workable deal. There will be regular updates in this report throughout the year.

2019 was another challenging year for U.S. hardwood exports to Europe, with overall shipments of lumber down in volume by 9%. There were declines to all the main markets, although the UK was only down slightly at 108,500m³ (-3%) and still accounts for 33% of the EU total. White oak saw an overall decline of 9%, tulipwood was down 20% and ash was unchanged, but it is encouraging to see that red oak exports are continuing to increase, up by 18% on last year (24,281m³) boosted by a 29% increase in the UK to 6,000m³. This is the highest level of red oak lumber exports to Europe since 2007. There will be a full analysis of the 2019 statistics in next month’s report.

2019 has seen a significant surge in the rhetoric in Europe surrounding the climate change debate. A constant flow of scientific reports and warnings, extreme climate events, and protests led by Extinction Rebellion in the UK and globally by Swedish schoolgirl Greta Thunberg, have catapulted climate change to the top of the political and media agenda. Policy makers, politicians and industry leaders, as well as environmental campaigners, are talking more loudly than ever about the immediate need for new agricultural policies, re-forestation, planting trees, reducing dependence on fossil fuel, carbon taxes, tackling plastic pollution and reducing impacts in the built environment. This is all leading to unprecedented media coverage about climate change and a wide range of other environmental topics. AHEC have already seen the benefit as we are finding that the mainstream media as well as the business press are much more interested in our messaging about sustainable materials, LCA and timber construction (as the report below on...
the Madrid Design Festival, demonstrates).

**ACTIVITIES**

**Legacy collection on show at IMM International Furniture Fair**

IMM is one of the largest and most important furniture fairs in Europe and attracts furniture designers, manufacturers and buyers from all parts of Europe and beyond. So, when AHEC was asked by its Creative Director if we would bring the Legacy project to this year’s show, we jumped at the chance. We were given an amazing space adjacent to the main entrance, which meant our eye-catching exhibition, showcasing the performance and versatility of red oak, was seen by tens of thousands of visitors during the week. We were joined by Benchmark, who crafted the pieces, and three of the designers. Together with AHEC European Director David Venables they gave two talks about the project and also briefed a group of 70 German architects about the exhibition.

Legacy generated huge publicity across Europe when it was first seen at last year’s London Design Festival, but IMM created a further opportunity to reach the more specialised furniture design media, generating additional coverage. This publicity is very valuable for continuing to create awareness for the potential of red oak, but probably the most important impact came from reaching many of Europe’s leading furniture brands directly. A number of companies are now looking into red oak as an option and one high-end woodworking workshop confirmed they were already using red oak as a result of attending an AHEC/NHLA workshop last September, held for a major German hardwood distributor and their customers.
MultiPly a massive hit with the Spanish media and the Madrid public

After being exhibited in London twice in 2018 and last year in Milan, the award-winning experimental tulipwood CLT installation, MultiPly, is on show at the entrance to the Casa del Campo park in central Madrid. We have taken MultiPly to Spain as part of Madrid Design Festival 2020. The city hosted the last round of international climate change talks at the end of last year, so the media are focused on how Spain will reduce its emissions and MultiPly’s message of how timber can provide a low impact alternative to concrete, is particularly relevant. It also catapulted AHEC and American hardwoods into the national media all over Spain as it opened to the public at the end of January. Already tens of thousands of people have visited the structure and briefings with many of Spain’s leading design and architectural journalists is creating a lot of publicity.

Several national TV channels visited the pavilion, including La 1 (TVE1), one of the most watched tv channels in Spain. Click here to view the clip.

For more information, go to multiplymadrid.online.
Spain’s young designers rise to the red oak challenge

Over the past year, AHEC have been collaborating with Spain’s young design association, AIDI, to stage a national competition under the banner Toca Madera (“touch wood”), by creating a new product in American red oak. More than 150 designers originally applied to take part and now, after educational seminars, a mentoring phase and workshop experience, we have eight fully developed prototypes. The shortlisted pieces are presented as part of a series of exhibitions in the Fernán Gómez Cultural Centre for Madrid Design Festival, which opened at the end of January. It has been very exciting to see young talent emerge and there are really interesting results, some undoubtedly with commercial potential. The final judging to select three winners will take place on the 14th February, followed the day after by an award ceremony and a discussion.

The young designers were challenged to create "infinite objects" in American red oak.

The 8 final Toca Madera pieces are on display at the Fernan Gomez Cultural Centre in Madrid until 29th Feb.
event about the project. AHEC have made a film to accompany the exhibition and there is also an opportunity for the public to vote for their favourite piece. AHEC would like to thank Spanish hardwood importer AE Madera who donated the red oak so the prototypes could be beautifully made at renowned wood working fabricator, La Navarra. Some of the finalists have been interviewed on national television and radio about their experience and Toca Madera is being widely reported in the Spanish design media, both online and in print.

To learn more about the competition and the individual pieces, visit convocatoriatocamadera.com/en/calls-bases/

The exhibition also features a film made by AHEC.

NEWS ROUND-UP

Have the EU plant health requirements changed for US hardwood exports?

A number of AHEC members and associations have alerted us to what appears to be new phyto-requirements for lumber exports to the EU, in particular for red oak. We have examined the relevant EU plant health websites and talked to the Forestry Commission in the UK and can provide the following update

On 28th November 2019, the EU passed a new Phytosanitary Conditions Regulation (PCR) which is the culmination of a major revision of EU Plant Health Directives underway since 2016. The PCR (officially referenced as Commission Implementing Regulation EU 2019/2072) together with the Official Controls Regulation (2017/625) and the Plant Health Regulation (2016/2031) are collectively known as the Smarter Rules for Safer Food (SRSF). The revision process has involved the repeal and replacement of seven existing European Directives on harmful organisms with the aim of modernising the EU plant health regime and enhancing protective measures. The new rules increase the focus on preventing the spread of certain pests and impose broader requirements for importing certain plants and plant products (including wood) into the EU.

The PCR came into force in all EU Member States (including the UK) on 14th December 2019. For those interested in the details, the text of the new PCR is available at https://eur-lex.europa.eu/legal-content/EN/TXT/PDF/?uri=CELEX:32019R2072&from=EN. Specific requirements for placing of US hardwoods on the EU market are identified in ANNEX VII, articles 83-99 on pages 165-175. To a large extent, the requirements for US hardwoods in the PCR reiterate those already applicable before the new law came into force. Also unaffected by the regulation are the EU derogations for ash and bark-free oak lumber with an NHLA kiln dried
certificate (subject to the conditions described by NHLA at https://www.nhla.com/nhla-services/certifications/).

However, there have been some reports of problems arising from differing interpretations of the new law by EU Plant Health authorities. We are aware of a few cases where phytos have been rejected by EU authorities for alleged failures to include necessary declarations relating to specific pests. We understand that in these few cases the problems have been resolved following intervention by APHIS. In line with the new law, APHIS have updated the detailed guidance on requirements for export of US hardwoods to the EU in the Phytosanitary Export Database (PExD) (which can be most readily accessed by googling ‘USDA PExD’). AHEC members are advised to familiarise themselves with the PExD guidance and to ensure full compliance with the new requirements in all shipments to the EU.

AHEC members are encouraged to contact AHEC’s David Venables (david@americanhardwood.org) and Consultant Rupert Oliver (rjwoliver@googlemail.com) if they continue to encounter problems with non-acceptance of phyto certificates by EU Plant Health authorities or any other issues arising from introduction of the new regulations.
PR HIGHLIGHTS - MULTIPLY

**ABC Madrid**
American tulipwood
ABC Madrid | Spain
Circulation: 14,200,000

**España Directo**
American tulipwood
RTVE | Spain
Circulation: 400,000

**El País**
American tulipwood
El País | Spain
Circulation: 27,700,000
PR HIGHLIGHTS

Legacy
American red oak
T-online | Germany
29,000,000 circulation

¿Por qué un exprimidor nos hace la vida más fácil?
El Centro Cultural de la Villa acoge cuatro propuestas de nombres como Patricia Urquiola, Juli Capella, entre otros, dentro del Madrid Design Festival
Toca Madera
American red oak
La Razon | Spain
2,500,000 circulation

Toca madera
American red oak
Experimenta | Spain
30,000 circulation

Legacy
American red oak
WP | Poland
653,700 circulation

Lead Generation for Tech Companies
Saravan Sivakumar leads the way for Multilingual Tech Experts
dom
08.11.2019 18:58

Legacys: Spotkanie rzeźbiarskiego designu i kultury
La semana 2019 miasta czerkowskiej wraz z międzynarodowymi projekcjonistami pokazały wyjątkowe okazje z czerwcowego dnia amerykańskiego i jego wpływem kodem „Legacy” (Codex) (Legacy). Została ona po raz pierwszy pokazana podczas Londynskiego Festiwalu Designu 2019 – w czerwcu 2020 roku po raz pierwszy te zrówna termini w Niemczech podłączając się w Kolonii.

Köln (dpa/inew) - Nachhaltigkeit, da war doch mal! Was manche den Gute-Effekt nennen, ließ auch Auswirkungen auf die Einkaufsträger. Die hat endlich eine Chance, etwas an den Menschen zu bringen, was sie seit Jahren massiv vorantreiben: nachhaltiger und umweltbewusster produzierte Möbel.
UPCOMING EVENTS

1-29 February 2020*
Madrid Design Festival
Festival | Madrid | Spain

10-13 March 2020*
Fimma Maderalia
Trade show | Valencia | Spain

21-26 April 2020
Salone del Mobile Milano
Design Fair | Milan | Italy

23 April - 3 May
Copenhagen Architecture Festival
Festival | Copenhagen | Denmark

23 May-29 November*
Venice Biennale
Festival | Venice | Italy

27-29 May*
Carrefour International du Bois
Trade show | Nantes | France

*DENOTES AHEC PARTICIPATION

EXCHANGE RATES

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