DESPITE CHALLENGING CONDITIONS, AHEC HAS BEEN BUSY

While the ongoing COVID-19 pandemic has put a complete stop to both international and domestic travel for AHEC’s Dubai-based Regional Director and forced the postponement or cancellation of many planned events and activities, it has not been a time of inaction. In fact, this desk-bound period has been very productive, allowing AHEC to focus on improving existing communication tools and developing new ones, as well as updating contact databases, identifying American hardwood case studies and also trying new things, such as delivering presentations to architects over Zoom.

At the same time, not all activities outside the office have come to a stop and collaborative projects with designers and manufacturers in the UAE, India and Australia have all recently been launched.

More on these and also updates on the individual market regions, including 1st half 2020 U.S. hardwood exports can be found below.

MIDDLE EAST & NORTH AFRICA

MARKET UPDATE

The large and diverse region has been, and continues to be, severely affected by the COVID-19 pandemic. The hardest hit countries in the region, in terms of cases of the virus and related deaths, have so far been Pakistan, Turkey, Egypt and Saudi Arabia.

However, on a purely economic level the pandemic has had a very major impact on the oil-dependent Gulf states, in particular, which implemented strict, and expensive, lockdown measures very early on. The average oil price for 2020 was forecast by a recent Reuters poll to be just USD 36/barrel, down from USD 64/barrel in 2019 and only slowly rising to USD 59 by 2024. Prior to the crisis, most Middle East states were running deficits even with oil at USD 64, some of them very sizable, making for a very challenging environment overall. These deficits will require financing for many years to come, resulting in a slow recovery from the crisis. The sharp decline in oil prices exacerbated by lower demand due to the COVID-19 pandemic will result in USD 270 billion in lost revenues for Gulf Cooperation Council (GCC) countries, according to the International Monetary Fund (IMF). The IMF’s latest Regional Economic Outlook said oil exporters in the Middle East region are expected to face an overall economic contraction of 7.3%. The contraction is 2% larger than the IMF’s initial projections in April.
Non-oil GDP in these economies has also been marked down as stay-at-home rules and other COVID-19 containment measures are causing larger-than-expected disruptions to the tourism, hospitality, transportation, and retail sectors. The IMF had projected in April that Saudi Arabia’s economy would contract by about 2.3% this year, but it has since revised that figure downward, saying the kingdom stands to see economic growth shrink by 6.8% before climbing to around 3% growth next year. In addition to lower crude prices and cuts to production, Saudi Arabia stands to lose billions of dollars in revenue because the Islamic pilgrimage to Mecca was suspended due to the pandemic. For the first time in Saudi history, the hajj pilgrimage in July, which drew 2.5 million people last year, did not include pilgrims from outside the kingdom. To raise state revenue, Saudi Arabia tripled taxes on basic goods and services last month, increasing VAT to 15%.

The IMF also noted that, while the region’s oil importers benefit from lower oil prices, these are mostly being offset by hampered trade, tourism, and remittances and tighter global financial conditions and spill-overs on domestic credit conditions, which, along with confinement measures, continue to depress growth. Oil importing countries in the region such as Egypt and Jordan, are expected to see an overall economic contraction of 1.1%, nearly unchanged from the IMF’s April projections. The overall level of inflation in these countries, however, is expected to reach 10%.

There are massive challenges across the region, including in Lebanon, where inflation has rocketed to 56% over the past year and where the currency has lost nearly two-thirds of its value. The devastating explosion in Beirut on 4 August will only serve to further exacerbate the already crippled economy.

It should be no surprise, therefore, that exports of the American hardwoods to the troubled economies of the Middle East and North Africa have been negatively affected. The first half of this year saw a 35% year-on-year decrease in the volume of U.S. hardwood lumber exports to the region - the United Arab Emirates posted a 50% decrease in both the volume and value of hardwood lumber imported directly from the United States over the period and this is in line with significantly reduced construction activity during the past five months or so. It is also widely anticipated that this situation will worsen over the coming
months, as so many potential construction projects have been cancelled or put on hold temporarily. Dubai was set to host the World Expo this year, but this has also been postponed until late 2021 and, along with it, the race to get the site and all related infrastructure finished on time has slowed down. With hotel and F&B projects being major users of American hardwoods in the Gulf, demand is not anticipated to pick up again for many months, if not years.

Market drivers for American hardwoods in Saudi Arabia are similar to in the UAE and during the January to June period of this year, exports from the United States to the kingdom were down 33% in volume and 39% in value. At the same time, U.S. hardwood exports to Pakistan were down by a more modest 15% in volume and 23% in value over the period. This is primarily because many businesses have continued to operate more or less unabated during a time when total or partial lockdowns have been in place in other countries.

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To Turkey, the volume of U.S. hardwood lumber shipped during the first half of the year decreased by 7%, while the value was down by 15%. Interestingly, this decrease was primarily accounted for by a reduction in shipments of white oak and walnut to the market, which would be destined for the furniture sector. At the same time, however, shipments of ash - the vast majority of which would be for thermal modification - actually increased by 18% over the period, demonstrating the fact that Turkey’s TMT producers are extremely diversified in the markets for their products, which more than half of production being exported.

One MENA market, which showed some surprising resilience in demand for American hardwoods over the period was Egypt. Shipments to the market actually increased by 7% in volume, while remaining
unchanged in value. Rather like in Pakistan, many businesses did not shut down during the peak of COVID-19 infections.

**AHEC ACTIVITIES**

After having been postponed initially until June and then again to September, the decision was finally made at the end of June to cancel the 2020 edition of the Dubai Woodshow. A virtual version of the event is planned for 7-9 September and those companies that were signed up for the Dubai Woodshow this year will have the option of a free virtual booth. A presentation on this event was given on 6 August and a recorded video of the demo presentation can be watched here: https://youtu.be/QnyfdhpkbVs.

You can also download the Exhibitor Manual to see a step-by-step guide here: https://we.tl/t-F8keYQeIUq. Full information on the event and how to register as an exhibitor and set up your virtual booth can be found here: https://event10x.com/event/woodshow-global/login

For the moment, the 2021 edition will go ahead as planned at the Dubai World Trade Centre from 8-10 March, although this will be a hybrid version of the show, incorporating some virtual elements for those not able or willing to travel. Assuming a physical show takes place next year, there will be an American Hardwood Pavilion, covering 186 square metres and with space for around eighteen 3m x 3m individual company booths. Official notifications regarding participation in the 2021 show will be sent out later in the year by Tripp Pryor in Washington DC.

Over the past few months, while not able to travel at all within the region, AHEC has been able to focus more on improving its existing communication tools, including social media accounts (Instagram, Facebook, Twitter and LinkedIn). At the same time, contact databases have been cleaned up and then used as the target audience for a completely overhauled monthly EDM (email newsletter), which links directly to the species pages, projects, case studies and sustainability information on the AHEC website. The quieter period has also given AHEC more time to reach out to some of the Middle East’s architects and designers in order to identify potential case studies (projects where American hardwoods have been used in a significant way or in new and interesting applications). One of the more significant case studies identified was KOA Canvas in Dubai, where thermally-modified tulipwood was used as cladding in the largest application of this material yet seen in the region. This particular project is of special interest, as the TM tulipwood was specified as a direct of the architect attending an AHEC seminar. The full project and images can be seen here: https://bit.ly/39oY9Ot

In May, it was announced that Dubai Design Week would go ahead this year in November, as planned, albeit with a high degree of social distancing and some major modifications to the programme. Needless to say, it is not expected to attract a significant number of international visitors, but there will be a more sophisticated virtual element to the event, with easy online access to the exhibits, activations and panel discussions.

With Dubai Design Week going ahead, an opportunity was seen for AHEC to be a part of a physical event in the region this year. With this in mind, AHEC has recently launched a new collaborative design project in the UAE. Three high profile Emirati designers and their teams have been invited to design and
develop a hardwood bench for outdoor use in a public space. The bench or seat will be designed in such a way that people who sit on it are forced to separate by the current UAE-mandated social distancing minimum of 2 metres. This will negate the need for warning signs and allow for people to sit in a relaxed way without having to think about whether they are too close to the next person.

However, the design of the bench will also allow for conversion to accommodate more people, closer together, as and when the time comes for social distancing regulations to be relaxed. This will ensure that the benches retain a legacy as functional public seating in the future.

AHEC has asked each designer to select from three thermally-modified U.S. hardwood species (a single species or combination of two or three), which are red oak, hard maple and tulipwood. All the lumber for the project is being donated by a UAE manufacturer from landed stocks.

The project has been entitled Please Sit Here and it will be shown as an outdoor exhibit at Dubai Design Week, which opens on 9 November 2020. AHEC firmly believes that thermally-modified American hardwoods will be specified more and more in the coming years by UAE and other Gulf-based architects and designers, as their knowledge and understanding of this material improves. There is a significant requirement for exterior wood specification in the region, in furniture, pergolas, shade structures, cladding and decking and an increasing amount of interest has been shown in moving away from tropical hardwood species that are normally used, such as iroko or even meranti and obeche. Having local project references, such as KOA Canvas (see above) and Please Sit Here, should help local designers and architects to understand these materials even better and to feel more comfortable specifying them in the future.

INDIA

MARKET UPDATE

At the time of writing, India has the third highest number of COVID-19 cases in the world, with over 2.2 million. However, a severe lack of widespread testing means that there is a massive gap between confirmed and actual cases, with some experts saying that the latter may actually be as high as 50 million.
India imposed a total lockdown on 25 March, which had an immediate impact on business activity. However, in an effort to maintain economic growth, this has been progressively eased since then, despite rising cases of the virus and an overloaded healthcare system. Interestingly, India’s largely informal economy has showed more resilience during this period than many other more developed world economies. This is partly because the people - no matter what their government asks of them - cannot afford to stay at home and not work.

A recent Economic Times of India article forecasts that the Indian economy will rebound as the impact of the pandemic recedes, with improving economic growth momentum in the second half of 2020 and positive GDP growth of as much as 6.7% in the 2021-22 financial year. Despite the negative short-term shocks from the pandemic, total foreign direct investment (FDI) into India has remained buoyant through the period. FDI by technology firms in the first seven months of the year reached around USD 17 billion, boosted by the USD 10 billion new investment announced by Google in mid-July. Facebook, Amazon, and Foxconn are among the other global technology firms that have committed large new investments into India this year. The digital transformation of India that is currently underway is expected to accelerate the growth of e-commerce, changing the retail consumer market landscape over the next decade. This is attracting leading global multinationals in technology and e-commerce to the market.

The report also suggests that the medium-term economic outlook for India remains favourable, supported by a number of key growth drivers. An important positive factor for India is its large and fast-growing middle class, which is helping to drive consumer spending. Total Indian consumer spending is forecast to grow by 42% between 2020 and 2025. India’s consumption expenditure is forecast to double from USD 1.6 trillion in 2020 to USD 3.2 trillion by 2030, measured in constant prices, boosted by strong average annual GDP growth and rapidly rising per capita incomes for the country’s fast-growing middle-class urban households.

In the immediate term, the market for imported hardwoods in India has been significantly affected by the pandemic and resultant lockdown measures, with importers and end users adopting a wait and see approach to placing orders to new material. During the first half of the year, U.S. hardwood lumber exports to India fell by 45% in volume to 1,081 cubic
metres and by 45% in value to USD 634,000. Having shown its most promising year yet in 2019 for demand for American hardwoods, it is particularly disappointing to see such poor performance this year. However, market commentators report that this negative situation will change quickly and that there is pent up demand for imported hardwoods, including U.S. hardwoods. In fact, during the past few months, AHEC has had a lot of contact with the furniture manufacturing sector in India and a lot of interest has been shown in American hardwoods. It is expected, therefore, that the decrease seen in the first half of this year will be reversed fairly quickly, although much will depend on the severity of the impact of COVID-19 during the coming months.

AHEC ACTIVITIES

With India being under varying stages of lockdown since late March and with the number of COVID-19 cases still very much increasing at the beginning of August, all of AHEC’s planned activities for 2020 have been cancelled. These included participating in the INDEX design fair in Mumbai in June and then again in Delhi in August, at which AHEC was going to exhibit the Preservation Bench made by Johannesburg-based Houtlander in American white oak. Plans were also being put together for another tour of furniture manufacturers and a mini-convention in October, which would have been open to AHEC Members. This time, AHEC was looking at touring companies manufacturing wooden furniture in Delhi and the surrounding area.

Despite this, AHEC has been actively engaged with India’s hardwood traders and end users over the period and, as a result, a number of new case studies have been identified, while good connections have been established. In fact, the quieter period has allowed AHEC to spend a lot of time conducting in-depth research in to India’s furniture manufacturing sector and to identify a significant number of companies previously unknown. Furthermore, many of these are already using imported temperate hardwoods for their production, which is primarily targeted at India’s domestic market. In most cases, these companies are using European oak, ash and beech, but some are already familiar with and are using American hardwoods as well.

As a further evolution of this research, AHEC launched a database clean-up project in June, which is till on-going. Through telephone, WhatsApp and email, all companies are now being contacted and asked to provide more information on their activities and their familiarity with American hardwoods. The results of this work, which will conclude in the next month or so, will help AHEC to obtain a clear and up-to-date picture of the existing and future potential market for American hardwoods, while also providing AHEC with a solid contact database for future communication.

Running an effective American hardwood promotion programme in India presents significant challenges due to the size of the market and the unorganised nature of much of the trade and industry. However, despite not being able to travel there since the beginning of the year, AHEC has been able to remotely launch a new project with five furniture manufacturers. Entitled REMAKE, the project challenges these companies to each select three pieces from their existing wood furniture range and to remake them using American hardwoods.
REMAKE was conceived as a response to the need for hands-on experience with American hardwoods in India’s furniture manufacturing sector. The wealth of legally-harvested and sustainably-managed hardwoods that the United States has to offer is of increasing interest to India’s furniture manufacturers, as they seek to explore new materials, look for long-term alternatives to traditional furniture hardwoods and also widen their appeal to their intended markets, be they in India itself or overseas. However, American hardwoods are not yet well-known and understood in India and only a handful of manufacturers have hands-on experience with working with them. This lack of experience and lack of collective knowledge means that, to most manufacturers (and consumers), American hardwoods remain somewhat unknown.

AHEC will be supplying all the lumber for the project from a stock of six major U.S. hardwood species held in Jodhpur. This wood was donated to AHEC and shipped to Jodhpur by Dean Alanko of Allegheny Wood Products at the beginning of the year.

AHEC does not currently have plans to hold a physical exhibition of the finished pieces from the REMAKE project, but it will certainly consider this if a suitable opportunity arises in the next 6-12 months. However, every effort will be made to make sure that the project receives maximum exposure in the media and on AHEC’s own website and social media platforms.

AUSTRALIA & NEW ZEALAND

MARKET UPDATE

Having reacted quickly to the pandemic by closing borders and implementing other measures to prevent the spread of the virus, both Australia and New Zealand fared much better than many other countries. The situation in Australia has recently deteriorated and the State of Victoria is particularly badly affected, but at no point during the crisis has either country faced the same severity of turmoil as experienced in many other developed countries. Nonetheless, the economic impact of the pandemic has already been significant and worse may be to come.

In late July, the Australian government unveiled its Economic and Fiscal Outlook, setting out how COVID-19 has impacted the Australian economy and the nation’s finances. In short, it paints a sobering picture of the state of the Australian and global economies. The huge levels of government support
injected into Australia’s economy from March could only limit the negative fallout from the pandemic, not managing to keep Australia out of recession. The Outlook forecasts that Australia’s economy will shrink by 2.25% in the 2020/21 financial year and by 3.75% in the 2020 calendar year, before rising by 2.5% in 2021.

However, others have a more pessimistic outlook. The OECD recently forecast that Australia’s economy will shrink by 5% in 2020 (in a best case scenario of a single wave of COVID-19 infections), or decline by 6.3% if there is a second wave of infections. In this double-hit scenario, the OECD is forecasting the economy will grow only 1% in 2021. The OECD also stated that consumption in Australia will be tempered due to “lost earnings, higher unemployment levels and ongoing caution,” while “reduced demand, more fragile finances and uncertainty” will weigh on business investment.

In New Zealand, despite the significant fiscal and monetary policy measures deployed to cushion the impact of the pandemic and the relatively fast lifting of lockdown measures, the economy is expected to take a severe hit this year. A second half recovery will crucially depend on the evolution of the health situation, which represents the main downside risk. Market experts project the economy to contract by 5.3% in 2020 and to grow 5.3% in 2021, providing there is not a second wave of infections.

Perhaps surprisingly, demand for American hardwoods in Australia has remained buoyant through the first half of this year and market commentators report thriving business activity and sales for the moment, despite the worsening situation and a lockdown in Victoria. Exports of U.S. hardwood lumber to Australia grew by 19% in volume to 12,442 cubic metres and by 17% in value to USD 9.0 million during the first half of this year.

This increase was almost entirely accounted for by imports of red oak lumber, which is beginning to be pushed by one or two Australian importers as an alternative to native Victorian ash for stairs, windows and doors. It is not eating into the existing market for white oak and it represents a new market opportunity for American hardwoods. In fact, it also comes at a time when the Australian forestry sector is coming under increasing scrutiny from the environmental lobbies in the wake of the devastating forest fires seen at the end of 2019 and in to the beginning of this year. Although seen by many as a knee-jerk reaction, Australia’s largest hardware retailer, Bunnings, recently took the decision
to ban native hardwood products from VicForests (the State-owned enterprise responsible for harvesting from the State of Victoria), after they were ruled by a Federal court to have breached the code of practice for timber production. Although a complex situation, which many feel may be reversed in the next future, such a ruling and the actions of such a well-known company and brand are having a damaging impact on the image of Australian hardwoods.

Market commentators also report that purchasing of American hardwood lumber for the remainder of the year should remain fairly strong, but that the real impact of the economic slump on demand for hardwoods may be felt six months down the line.

In New Zealand, the situation for American hardwoods was less positive during the first half of 2020, with year-on-year exports of U.S. hardwood lumber declining by 40% in volume and by 41% in value to just 2,252 cubic metres and USD 1.8 million, respectively. This is expected to improve marginally during the second half of the year, but overall hardwood demand and consumption will remain subdued for some months to come.

**AHEC ACTIVITIES**

With travel to Australia and New Zealand out of the question until, at least, the beginning of next year, AHEC has had to step up its use of online platforms for communication. Fortunately, remote working in Australia and New Zealand is very developed and the transition to using Zoom to communicate with contacts there has been relatively easy to make. Through this desk-bound period, AHEC has been able to maintain good connections with importers, manufacturers and designers and architects in both markets and these contacts have been very useful in helping AHEC to identify American hardwood case studies. One of the more significant case studies identified was in Melbourne, where black-stained thermally-modified tulipwood was used as cladding on a private house near the beach. The full project and images can be seen here: [https://bit.ly/2BUjoLM](https://bit.ly/2BUjoLM)

At the beginning of the year, AHEC entered in to a partnership with the Museum of Applied Arts & Sciences (MAAS) in Sydney to bring about the 2020 Architectural Commission, which was originally scheduled to be unveiled during Sydney Design Week this September. With Sydney Design Week now cancelled due to the COVID-19 pandemic, the decision has been made to put off the Commission until 2021, when it can be linked to another design event in Sydney. Designed by up-and-coming New South Wales architects, Curious Practice, the Commission will be an outdoor installation in both natural and thermally-modified American red oak, incorporating mass timber sections. The red oak lumber for the installation will be donated by Victoria-based Australian Sustainable Hardwoods. When complete, the Architectural Commission will be unveiled at MAAS’s central Sydney location, where the plan is to use it for multiple activations, including panel discussions, all targeted at the design community. It will give AHEC an opportunity to really showcase American red oak, which is only just beginning to gain acceptance in Australia.

This year, AHEC is a sponsor of the INDE.Awards 2020, which is a high profile Indo-Pacific architecture and design annual awards, hosted by Indesign Media. Because the awards programme covers all of
Asia and the Pacific, AHEC’s Hong Kong office and AHEC’s Dubai-based Regional Director are working together on this project. Although the physical awards gala set for 14 August in Sydney has been cancelled, both of AHEC’s Regional Directors will participate in a virtual gala and awards ceremony instead.

Indesign Media also hosted a live CPD-accredited (Continuing Professional Development) series of Zoom webinars in June, in which AHEC participated. AHEC’s Dubai-based Regional Director, gave a one hour presentation to over 200 architects in Australia and New Zealand entitled Specifying Hardwoods with Confidence. The presentation was pre-approved for CPD points by the Australian Institute of Architects and now sits on the Indesign Media website, where it can be viewed. A second live session will also go ahead on 1 October.

For the past four years, AHEC has taken part in Denfair in Melbourne in June, which is Australia’s leading design fair. The physical event was cancelled this year, but AHEC was still able to contribute to the virtual event through a pre-recorded hour-long Masterclass session on American hardwoods.

AHEC is currently teaming up with renowned digital craftsman, Marcus Piper, in New South Wales, to create 12 short films with Australian designers and manufacturers. The films will be based on short interviews, during which the 12 selected individuals will be able to share their work in American hardwoods and to talk about their experiences of using American hardwoods. These films will be used on a variety of digital platforms over the coming months and they will serve to maximise the visibility of AHEC’s messaging through well-known members of the design and manufacturing community.
SOUTH AFRICA

MARKET UPDATE

The South African economy, which was already struggling before the pandemic due to slow growth and high unemployment, is currently facing further substantial challenges as policymakers attempt to mitigate the damage of COVID-19. Before the pandemic hit, the unemployment rate in the first quarter of 2020 was 30% and South Africa was in its second recession in two years. As COVID-19 set in, 1 in 3 income earners in February had lost their source of income by April. Half of these people were permanently laid off. Labourers already more vulnerable than others have been disproportionately hit as well, with two-thirds of the net jobs lost belonging to women, while manual workers were almost three times more likely than professional workers to be laid off.

Policymakers worry that a recent surge in coronavirus cases and deaths, which has already resulted in the government reinstating the alcohol ban and curfew, could result in more draconian measures that will yield additional layoffs. At the time of writing, South Africa is the fifth hardest hit country in terms of cases of COVID-19 and is recording an increasing number of daily cases.

Business activity across many sectors in South Africa has all but ground to a halt this year and market commentators report extremely low demand for furniture and joinery. This has translated into much lower demand for American hardwoods. The total volume of U.S. hardwood lumber exported to the market decreased by 46% in volume to 2,369 cubic metres and by 44% in value to USD 2.0 million during the first half of the year. Despite the bleak picture, there was a small increase in demand for red oak lumber, which is now being shipped to South Africa both as TMT or for thermal modification in South Africa itself.

No recovery in demand for U.S. hardwoods is forecast for the foreseeable future, as the true fallout from the COVID-19 pandemic will not be known for some time to come.

AHEC ACTIVITIES

Since participating in Cape Town Art Fair in February with the third edition of the Preservation Bench by Houtlander, AHEC has been able to do little on the ground in South Africa. Despite this, AHEC has been very focused on using the time to increase social media activity and ensure that all contacts receive the monthly EDM (e-newsletter), which links to AHEC’s website.

AHEC was making plans to participate for the third time in 100% Design South Africa in August, but this was cancelled, along with so many events, due to the country’s severe COVID-19 situation and very strict control measures.

While there are no plans at present to launch any projects in South Africa, AHEC will maintain its regular communication with the timber trade and architectural and design media, while also updating its social media channels and sending out a regular EDM to all contacts.

www.americanhardwood.org
Left: India | Print
Timber Design & Technology International - feature on INDO-Indian designer-makers using U.S. hardwoods

Right: India | Print
Wood News - feature on INDO-Indian designer-makers using U.S. hardwoods

Left: South Africa | Print
Timber IQ - feature on AHEC’s Connected project

Right: South Africa | Print
Timber IQ - news piece on AHEC/Houtlander collaboration & pop-up exhibition in Cape Town.

Left: Middle East | Print & Online
Timber Design & Technology - cover story & feature KOA Canvas project

Right: Middle East | Print & Online
Timber Design & Technology - news story on AHEC sustainability report
**REGIONAL EVENTS**

*AHEC event or AHEC participation*

This very short list of events includes only those that remain confirmed. However, all events are subject to possible postponement or cancellation due to the dynamic situation brought about by the COVID-19 pandemic.

For further information on any of these events or on AHEC’s activities in these markets in general, please contact Rod Wiles: rod@americanhardwood.org

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<td><em>9-14 November</em> Dubai Design Week Dubai, United Arab Emirates</td>
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<td></td>
<td>3-6 December Cairo Woodshow (hybrid event) Cairo, Egypt</td>
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<td>2021</td>
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<td></td>
<td><em>8-10 March</em> Dubai Woodshow Dubai, United Arab Emirates</td>
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