Picture: Brooks Bros Timber

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Timber Forum News

The free magazine for timber & builders' merchants published by the Builders' Merchants Federation and Timber Trade Federation

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Panel products: tight supply forecast for 2019 but more growth anticipated

At the Timber Trade Federation's inaugural UK Panels Conference on 7th November, the European Panels Federation (EPF) said that annual growth in the European panel products market of around 3% had been the average in recent years and was likely to continue into 2019.

Raw materials are still an issue for wood-based panel manufacturers, remaining in short supply, and generating a tight supply forecast for 2019. EPF's lobbying for acceptance of a hierarchy of wood use, in which biomass ranks below panel products as a use for wood raw materials had been successful.

Global demand for wood-based panel products is still exceptionally high, as architects and designers world-wide now better understand timber products' beneficial contribution to climate change.

Innovation driving sales

Innovation in panel product manufacture was high on the agenda. The conference heard details of the first commercially-viable MDF recovery system, which TTF member, the W Howard Group, has been involved in testing. Addressed by David Murray, Innovation Manager at MEDITE SMARTPLY, the audience was appraised of the commercial basis for their R&D and product development, and their engagement with developing building-level embodied carbon measurement. This helps to drive sales.

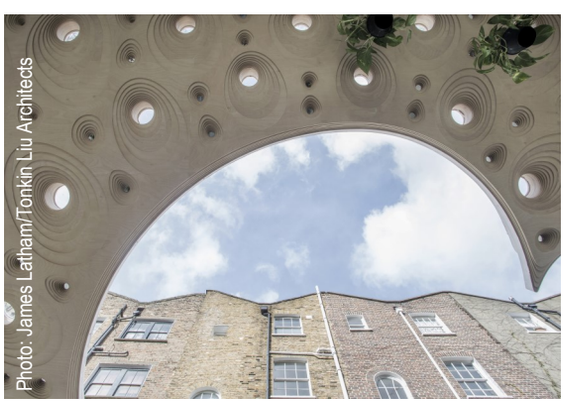


Photo: James Latham/Tonkin Liu Architects

'Grenfell changed everything'

Stephen Cope of Meyer Timber gave a detailed presentation on compliance with the Construction Products Regulation in relation to panel products and ordering preservative treatments for them. His presentation, with all the technical details of what to ask suppliers for in the way of documentation and accreditation, and where supply chain responsibilities begin and end for suppliers and merchants alike, can now be found on the website at ttf.co.uk. Stephen Cope concluded with the three words: *'Grenfell changed everything'*, advising delegates to check thoroughly their responsibilities under the law.

The final presentation, from architect Peter Wilson, outlined architects' interest in and reasons for using an ever-increasing proportion of panel products, and in ever-more innovative ways.

We are always interested to hear your feedback on this publication and the Timber Forum. Please contact: Benedetto Antuono on bantuono@ttf.co.uk or Richard Ellithorne on Richard.ellithorne@bmf.org.uk

Planning ahead for new constructive futures

Looking forward is essential to keeping Britain building, say TTF, BMF and FMB

VIEWPOINT:
John Newcomb, BMF

"Building Excellence in Materials Supply is the BMF's new vision governing our activities, and those of our members, through to 2020. Part of that vision is to use our influence with government to ensure that post-Brexit business is not disrupted by customs duty, dockside delays, or procedures that could hamper timber and other imports. We are also behind our colleagues in the FMB in campaigning to simplify and speed up the planning process to enable them to build the homes we need.

Advance planning and communication are the heart of these actions, and at the heart of business continuity for our members. We must all be clear in communicating our positions, products and pricing to customers. It is part of our members' commitment to customer service to deal with customers promptly, offer comprehensive stock and to ensure timely deliveries. These factors, though, are also reliant on timely information coming from our suppliers. At a time when challenges have never been greater, it benefits all of us to work closely together. Trust breeds good business, and also builds excellence in materials supply."

VIEWPOINT:
Brian Berry, FMB

"Earlier this year, the FMB undertook research which showed that rising material prices were causing considerable concern to small and medium-sized (SME) construction firms. From March 2017 to March 2018, SME builders reported an average 10% increase in the price of timber and a 15% increase in the price of insulation.

More than half of these firms said that material price rises had squeezed their margins and worse still, almost one fifth of builders had to absorb the increase and make a loss on particular projects due to prices increasing sharply mid-project. Prolonged wait times for a range of materials have also had an impact on firms. Many small house builders were reporting significantly longer lead times for certain types of timber, and in the very worst case scenarios, some had to wait for up to two months. With more than three-quarters of building firms now saying they expect further price rises over the next sixth months, builders merchants should give their customers as much advance warning as possible of forthcoming increases in prices and wait times. This will allow contractors to plan ahead, warn their customers and price for projects more accurately."

VIEWPOINT:
David Hopkins, TTF

"For most people the focus of the past year has been on Brexit and its effects. For members of the TTF, responsible for supplying much of the timber into the building materials supply chain from at home and abroad, additional concentration throughout 2018 has been fixed on the rising global demand for timber products.

From biomass to engineered wood, as the world seeks to lower its carbon dioxide burden, wood use is on the increase. While the use of sustainably-grown timber is great for the environment, high global demand has other impacts. Timber buyers in Britain are competing in thriving global markets, and resources only go so far before both pricing and availability are affected. Many TTF member timber traders and builders merchants have been doing their best to protect customers from the full force of global demand, and there are now signs that 2019 may become a less frenetic year. Whatever happens in the next six months, keeping customers informed through our TTF market conferences, alongside day-to-day relationship-building across the supply chain, will help create better futures for all our businesses."

BMBI Update: Timber Products Market still buoyant according to August 2018 data

The August 2018 issue of data from the Builders Merchants Building Index on timber products revealed that, year on year, the timber and joinery products segment grew by 9.5% compared to August 2017.

Year to date (August 18) sales of timber and joinery products were up by 4.5%, but were down by 3.4% when compared to statistics for July 2018. The positive vibe in the market was continuing as Timber Forum News went to press, though Q3 full data from the BMBI was not yet available. It will be published just before November's BMF Timber Forum at John A Stephens Ltd.

Nigel Cox, Managing Director of Timbmet, BMBI Expert on Timber & Panel Products, comments: ***"****We remain optimistic for the future but are aware of significant uncertainty around Brexit. The uncertainty around importing protocols, should there be a 'no-deal 'Brexit, is another concern,"* Nigel Cox said.

For full details of and to view Q3 data when available, visit: www.bmbi.co.uk

New information campaign on 'treated timber'

The Timber Trade Federation is taking action on descriptions and guidance about preservative-treated wood products

Research in 2017 by the Timber Trade Federation (TTF) and the Wood Protection Association (WPA) to grow the market for preservative-treated timber revealed supply chain product knowledge as a central factor in selling treated 'Timber you can Trust'. A subsequent survey of Builders Merchants Federation members revealed similar needs for greater information, to ensure the correct type of treated timber is being sold for the builder's proposed end use.

The TTF has now produced an Action Plan, with information dissemination at its heart, to tackle the identified issues. In work being led by the TTF's National Softwood Division (NSD), the Federation has set out a timetable, culminating in its AGM in June 2019, for members to adopt three key proposals:

1. that treated wood is unambiguously labelled as fit for the intended purpose;

2. that customers throughout the supply chain are provided with adequate information to use treated products safely and effectively;

3. that preservative treated wood is being procured or purchased from operators who have been independently-assessed by a reputable accreditation scheme.

Verification data would be reported through the existing Responsible Purchasing Policy, to which all TTF members must adhere, as part of the annual reporting cycle.

Timber Trade Federation members and wider industry are being consulted in the coming months as to how best to achieve identification, labelling and understanding of timber treatment types and the technical Use Classes which define how such timber can be used. The TTF is developing guidance on compliance options for its members, with a view to adopting the policy formally in June 2019.

"There is a general misconception that 'treated timber' or 'green treated' are the only terms which merchants need to know when selling to builders," says David Hopkins, managing director of the Timber Trade Federation.

"In reality the level of timber treatment needs to be specific to the product's end use. So for example 'treated carcassing' may be suitable for Use Class 2, for internal use only. It would not be appropriate or safe to sell material treated to Use Class 2 for uses like decking joists. Any timber that comes into temporary or permanent contact with the ground must be treated to Use Class 4," says David Hopkins.

Photos: Arbor Forest Products

The TTF is encouraging discussion on plain English descriptions of the Use Classes so there can be no doubt at merchant counter level which product is suitable for which use.

"*Members are already looking at embedding the Use Classes in their product codes,"* explains David Hopkins.

"If word-based descriptions can be added to documentation there will be less difficulty for anyone across the supply chain in identifying the correct product for their customers."

New training materials and courses from BMF and TTF

A new set of timber-related e-workbooks is being launched by the BMF in response to member demands. The BMF Building Blocks series introduces new starters to the intricacies of life in a Builders' Merchant and they are an online programmes that combine fully immersive multimedia e-learning modules, knowledge checks, downloadable reference material and practical coursework.

Each Block is then brought together with a final assessment. Within 2 years BMF Building Blocks will be a fully accredited online programme that will define the standard of product training in the merchant industry. Merchant and supplier members will be able to access the content either via BMF Campus or via their own Learning Management Systems. Each Block will comprise between 12 and 20 hours of directed learning and each will earn credits for the learner towards an online award.

In January, the TTF is also launching its own Timber Academy scheme which combines product knowledge with sales training. The 12-month wood product sales training foundation programme will be accredited by the Institute of Sales Management, resulting in a recognised, individual qualification in timber sales. This is in addition to the Level 3 Award in Timber Merchanting and other training currently available.

Photo: James Donaldson Timber

Taking carcassing to great lengths

Scandinavian finger-jointed, long-length carcassing is now available in the UK through Jordeson Timber. Director Ben Scarborough explains its uses: *"The benefit of finger-jointed timber in joinery Redwood is to remove natural defects, so the resulting timber is straighter, easier to manipulate in joinery production, and more aesthetically appealing. The natural twist in a long section of timber is counteracted by having multiple shorter pieces finger jointed together. In this respect, engineered finger-jointed C24 can be considered a superior quality to a comparable solid timber section.*

"*For strength-graded finger-jointed Whitewood carcassing, however, the important factor is whether it passes the strength grade class criteria: C24 in this instance. Finger-jointed carcassing may still contain all the typical natural defects associated with strength graded carcassing. The key point is that the actual finger joint does not weaken the timber in any way. The joint is as strong as the timber itself and does not impede its structural capacity. A single piece of long length C24 carcassing may contain one or multiple finger joints without the strength being affected.*

"Our supplier, Derome Timber in Sweden, have invested heavily in a state-of-the-art finger-joint production facility that is capable of producing 30,000m3 of C24 in lengths up to 13.6m, with the availability of end-trimming to the nearest millimetre," Ben Scarborough relates.

Photo: Jordeson Timber

New Horizon in sight for Snows Timber

A new deal between Snows Timber and Horizon Coatings Inc of Canada is giving Snows exclusive distribution rights for the Provincial Plank brand of easy-install wall cladding which celebrates the natural characteristics, grain patterns and colour variations within wood. Made from a mix of Canadian Hardwoods including Maple, Ash, Oak and Cherry, each box contains the same ratio of different colour planks and needs acclimatising in the room for a number of days before use.

Pieces are simply glued to the wall and, with the addition of nailing in several places, can be fixed by any competent DIYer. Snows can provide samples on request.

The company's managing director, Ian Church, comments: *"Canada produces some of the best quality timber in the world. With the surging demand for interior wood cladding, we are delighted to be offering this product to the trade exclusively and for the first time."*

Stormy weather? Try Spruce Plywood

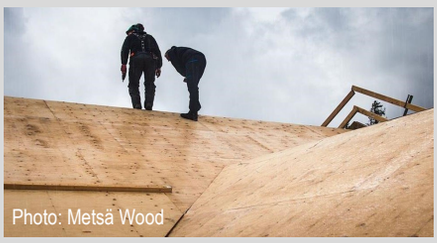


Photo: Metsä Wood

Spruce plywood with a hydrophobic surface, which rejects rain water, reducing the amount absorbed by the panel during construction works, is now available from distributors of Metsä Wood products in the UK.

Reduced water absorption causes the panel to be more dimensional stable which means you will not spend time on twisted and warped panels and that the panel dries up quicker, causing faster building time and less risk of mould growth later. Metsä Wood's Spruce WeatherGuard® can be used in floor and roof structures, agricultural settings and in repair & maintenance situations. It comes in a variety of sheet depths from 12mm upwards. This product would help merchants avoid extra costs such as; covering materials and waiting for materials to dry.

MDF to the rescue in the Lake District

Photo Medite Smartply

To enable mountain rescue teams to reach casualties quickly, boxes storing life-saving equipment are located across the Lake District.

The iconic blue boxes of Coniston Mountain Rescue have to withstand battering rain, howling winds and pounding hailstorms, which is why the team chose Medite Tricoya Extreme MDF to replace an old box in Dow Craig. Using material sourced from FSC®-certified forests, Medite Tricoya Extreme panels are easy to machine. Modification will not affect its ability to withstand the elements, as weather-resistant technology is embedded during the board's production. In addition to its ability to be used in situations not normally considered feasible for MDF products, the panels are durable and dimensionally stable.

Swedish lessons for EATTA lecturers

The visit was part of *'Who teaches the teachers'* programme

Marking the beginning of a 5-year education plan for the East Anglia Timber Trade Association (EATTA), three key university lecturers from the Eastern region travelled to Sweden to update their knowledge of today's timber production on 13-15th September 2018.

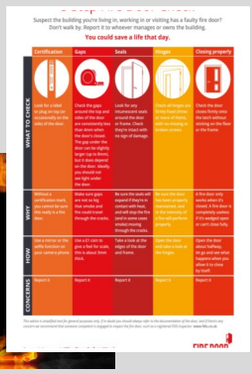
The visit was arranged by EATTA as part of its new 'Who teaches the teachers' programme, and hosted by the Industrial Solutions operations of Timber Trade Federation member, SCA Wood. The lecturers were invited and accompanied by TRADA's University Engagement Manager.

The visit included one of SCA's renowned tree nurseries, which produce 100 million tree seedlings each year for renewing Sweden's forests; and SCA's Tunadal sawmill, which produces around 500,00 m3 of sawn timber annually. The lecturers came from architectural and engineering disciplines, from the University of Hertfordshire, Anglia Ruskin University and the University of Suffolk.

"Over five years we could potentially see over 1500 new specifiers favouring timber and wood products as a result of this initiative," comments EATTA Chairman, Chris James of Nason Davis.

Take home the 5-step check

The British Woodworking Federation's Fire Door Safety Week took place at the end of September, in which many merchants took part by supporting the campaign on Twitter and through their branches. One of the most important 'take-home' messages of Fire Door Safety Week is that everyone can take five simple steps to check the safety or fire doors in their building. The '5 Step Fire Door Check' available as a leaflet template or video, includes checking for product certification labelling; checking that the gaps around the top and sides of the door are consistently less than 4mm when closed using something as easy as a £1 coin; checking the existence and state of intumescent seals around the door frame; checking hinges are intact, and checking that the door closes properly and is shut, as a fire door only works when it's completely closed.



Selling the right fixings for timber decking and cladding

Being aware of the correct type of fixings for timber decking and cladding is essential for merchants selling these products, says the Timber Decking & Cladding Association, which is often called upon when installations go awry.

It may sound a simple issue but it is often costly to rectify. *"Certain timber species warrant stainless steel fixings due to their density and inherent properties yet this is being overlooked,"* says Janet Sycamore, Director of Operations at the TDCA.

Unsightly black stains are often a tell-tale sign that incorrect fixings have been used, and are difficult to eradicate in remediation. The picture (right) shows what happens when galvanised nails not suitable for outdoors are used. TDCA Technical Bulletin TB08 covers using the right metal fixings with timber decking and cladding.

Showcasing British Wood

The annual Grown in Britain Week took place in October alongside Construction Week. Dedicated promotional packs were again made available to merchants by BMF Strategic Partner Grown in Britain, promoting #GreatBritishTimber. One GiB Week highlight was a visit to the Old Admiralty Building in London, being equipped with British wood by main contractors Willmott Dixon Interiors, attended by DEFRA minister Lord Gardiner. Main contractor BAM also issued a challenge to its merchant suppliers to get licensed with Grown in Britain.

Fire Risk and Me

Due Diligence is key fa

A summary of the recent TTF's Fire Risk Seminar in L

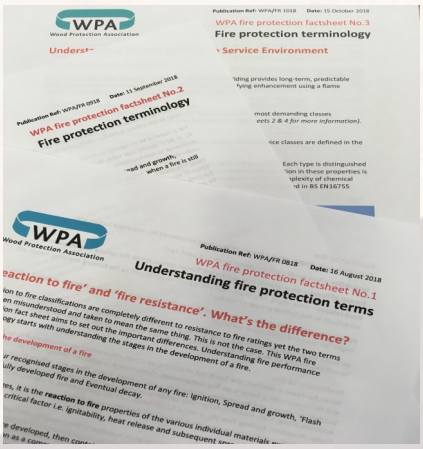
Three free fire treatment fact sheets from WPA

The Wood Protection Association now has three new and free-to-download fact sheets covering fire protection terminology and standards.

Factsheet 1 covers the difference between the terms 'reaction to fire' and 'fire resistance', which are often confused when ordering wood protection treatments. It covers in detail the reaction of a product to fire and where a fire retardant treatment fits in to the fire protection of a building.

Factsheet 2 goes into further detail on terminology and lays out a table detailing the Euroclasses, for example Euroclass B, which is often seen on specifications, and their meanings.

Factsheet 3 covers how to specify the Service Environment for flame retardant treatments including the Service Classes of BSEN 1995-1-1, giving examples. All are available at wood-protection.org.



Five-point check on FR-treated plywoods

Stephen Cope, (above left), Compliance Manager at Meyer Timber, gave an extensive presentation in conjunction with Lonza Wood Protection's Julie Hargreaves (right) at the TTF's Fire Risk conference. He outlines for Timber Forum News readers five key checks a merchant can undertake to minimise risk when selling flame retardant-treated plywoods.

"You are the customer's bastion of expertise. They have a 'reasonable expectation' that you know what you're talking about and are selling them the right product for their end use," Stephen Cope says. *"If you sell the wrong product, even unwittingly or through lack of knowledge, the customer may hold you responsible if anything goes wrong. Here are some basic checks which may help you minimise risk to your business:*

1: Ahead of purchase, demand a Declaration of Performance (DoP) for the product you're considering buying from your supplier and check it meets your own and/or your customer's needs. If in doubt ask your supplier for guidance.

2: Establish that the field of application and scope of use of the product covers the end use or build situation in which the products will be installed. Check the Reaction to Fire (expressed in EN13501-1:2011, usually as Euroclass B or C). Consider the Use Class expressed in EN335 (UC1 for dry internal; UC2 for humid areas, UC3 for situations exposed to weathering etc). Also check the Durability in reaction to fire, expressed in EN16755: 2017 (listed as Int1; Int2 or EXT). The Use Class and Durability must correspond with each other: UC1/Int1; UC2/Int2 and EXT covering UC3 or the Durability must exceed the Use Class.

Understanding your Responsibilities under CPR

Chairing the extensive Q&A session at the end of the day-long Building Centre conference, TTF managing director David Hopkins delved deeper into delegates' understanding of their responsibilities. The key question asked by a number of delegates related to responsibilities under the Construction Products Regulation.

David Hopkins, Meyer' Timber's Stephen Cope, and MEDITE SMARTLY's David Murray, all encouraged delegates to read the Construction Products Regulations for themselves to establish their positions.

The meeting coalesced around the position that where the CPR requires a Declaration of Performance and a CE Mark, then the organisation placing the products on the market for sale is ultimately responsible for providing fit for purpose products.

rchant Products

ctor to minimising risk

ondon, looking at associated issues and information

3: Check that the products you offer have an appropriate CE mark: it's essentially a brief summary of the Declaration of Performance. This may not necessarily be on the product: it can be on a label attached to the pack, or on documentation, according to the CE marking regulation (Article 9, Para 1). At Meyer Timber we produce a Declaration of Performance for our flame-retardant products which incorporates the CE mark.

4: When selling to a customer, check that the product you are showing them is correctly labelled. Stock often gets moved around in merchant yards and products can look the same. It's therefore easy to mis-identify a product. Correct identification is critical when it comes to selling flame retardant-treated plywoods.

5: Ask your customer questions about the product's end use. Ask about the field of application and intended end use. For example ask whether the panel will go against an incombustible surface such as brick wall or whether there's any likelihood of an air gap behind the panel. In a fire situation, an air gap could encourage the spread of fire. Some products permit an air gap but some products do not and the DoP will tell you. Be aware of your responsibilities for selling the right product for the job, and make sure your staff are aware and are properly trained too," Meyer's Stephen Cope says.

Photo: Lonza Wood Protection

Fire protection embedded During manufacture

The TTF fire risk seminar also looked at products from the inside out. David Murray, Innovation Manager with MEDITE SMARTPLY detailed how SMARTPLY FR/FR Build OSB3 and other products in their range have flame retardant treatment embedded during manufacture. Research and development by MEDITE SMARTPLY has led the company to apply Zeroignition's flame retardant to every strand of wood as part of their manufacturing processes. This means the integrity of the flame retardant is maintained throughout the OSB panel and the structural integrity of the panel is not compromised. This is a critical safety differentiator. The product is compliant with the Construction Products Regulation (CPR) and is CE marked for both structural and enhanced fire performance. The company also produces flame-retardant MEDITE MDF panel products. Details and technical data sheets are available on the company's website at www.mdfosb.com.

MEDITE's David Murray agreed that upskilling staff on flame-retardant products is essential in a post-Grenfell reality. He encouraged conference delegates to read the Construction Products Regulations and check product DoPs, as well as asking for evidence of product certification.

Photo: MEDITE SMARTPLY

Define your risk in documentation

Iain Garfield, Head of Commercial at BPE Solicitors, took delegated through checks at each stage of the supply chain which could help to minimise risk from potentially ordering wrong products or treatments from suppliers, and of those products then failing. Explaining how to define risks and descriptions within the supply contract, Iain Garfield looked at how to exclude, limit or sub-contract liability for insurance purposes. He told delegates to look carefully at how liabilities, products and treatments are described in documentation, and to make sure that documentation existed in the first place.

Iain Garfield also looked at what constituted negligence and responsibilities under the Consumer Protection Act. The ordering of timber treatments by a merchant on behalf of a customer was a particular focus.

Markets for 2019

Looking ahead to trends and c

From products innovation to raw materials availability a

Exploring wood flooring

Photo: The Solid Wood Flooring Co

Healthy and sustainable building trends could give merchants scope to diversify into wood flooring in 2019, says Rob Eckersley, General Manager of The Solid Wood Flooring Company. *"Opportunity is all about education. Understanding the drivers towards healthy and sustainable buildings, and their relation to marketing wood flooring, gives the option to rise above uncertainties affecting the economy.*

"Being flexible is also vital. We've adapted our ranges to make use of different grades, from prime to rustic, to minimise wastage. This means we can match the trends in the marketplace, where there is demand for both the Scandinavian 'unfinished' look and more country-style rustic tones.

"High-end specifications are usually for prime grade Oak (very few knots and small colour variation). This includes a preference for Oak that isn't 'yellow' or 'golden'. To meet this need, we use a process called 'fuming' to darken the wood. We then select out the lightest and darkest boards, packing them separately, thus helping to control colour variation.

"Our website and technical library help merchants and specifiers to demystify wood flooring covering factors to consider when using this sustainable material."

Photo: W Howard Group

Trends in MDF products 2019

The W Howard Group is one of the biggest producers of MDF products for the merchant trade in Europe. Simon Fleet, Commercial Director details the trends they are seeing as we look towards 2019.

"*Two of the biggest growth areas we are seeing are in finishes and in profile shapes,"* Simon Fleet reveals. *"Fully-finished skirtings, not merely primed but finished and ready to fit, painted in any colour customers desire, are seeing major growth. Within this category our KOTA product, a polymer-encapsulated, fully-finished skirting is also benefitting from good growth. As to colours, the kitchens & bathrooms market dictates the trends: blues and greys are still likely to be the on-trend colours for 2019. In kitchens, skirtings have become an accessory, not just a necessity.*

"In terms of profiles, we are seeing a move away from the complicated patterns of old towards more contemporary shapes: squarer profiles particularly, with sharper angles, seem to be in increasing demand.

"Merchants are also looking to stock slightly shorter lengths, moving down from 5.4m to 4.4m lengths. These can be stacked upright and turned more easily in the racks and are less prone to warping than longer lengths," W Howard's Simon Fleet comments.

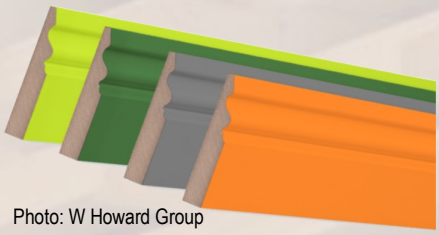


Photo: W Howard Group

No let-up in Decking demand

Photo: Arbor Forest Products

With more extreme summers affecting Britain's gardens, decking continues to provide a solution both for urban and country locations.

Jason Ostler, managing director of Arbor Forest Products, gives Timber Forum News readers his observations on the decking market and its potential next year: *"Softwood decking is a mature market and shows no signs of disappearing in 2019. We are still consistently growing sales year on year. We feel the softwood decking market will be stable next year. We don't anticipate any shortages of supply as we have worked hard to create stable relationships with sawmills,"* Jason Ostler says.

"Composite decking sales are also still growing. It is taking market share from across the landscaping market including from paving and aggregates.

We saw considerable growth in this during 2018 and with the new products we have planned for launch in the spring there will soon be composite products available to suit every pocket."

: What to expect

developments for 'Brexit year'

nd pricing, where is the timber market heading in 2019?

Photo: Södra Wood

Structural solutions: Strong & stable outlook

We asked Jeremy English, Sales Director, Manufacturing at Södra Wood, to give us his view of the market for structural timbers: *"The carcassing market is largely driven by RMI work, which has been fairly flat of late. Any increase in sales in 2019 will be covered by imported products, but they in turn are influenced by global demand, which is currently high,"* Jeremy English relates.

"The hot markets of 2018, the USA and China, are now cooling a little, though C24 and TR 26 demand is still stable and strong. CLS on the other hand is gradually coming back into balance between demand and supply. Overall we feel 2019 won't see the extreme price rises of this year, but there's certainly no price deflation. We reckon prices will either be up a little or flat looking ahead.

"Another area of change which may present opportunities for merchants is hybrid building solutions. Architects are becoming excited about combining different timber building systems, for example glulam with traditional timber frame. Our big development for 2019 will be the launch of our CLT (cross-laminated timber) manufacturing plant. We see this as a concrete substitute product, giving merchants an opportunity to sell into a different part of the market. We provide our customers with education on product developments, and also on how to store timber in extreme weather conditions, which we could see more of during 2019," he adds.

The going is firm in fencing supplies

How has 2018 been for fencing supplies and what's the outlook for 2019? Richard Greenaway, Commercial Director, Anglo Norden Forest Products Group, outlines the situation for Timber Forum News: *"In 2018, home-grown has had a very strong year across fencing and landscaping products. The usual suspects – feather edge and rails – all had extended lead times. We've also seen unprecedented demand for new softwood sleepers.*

"The possible uplift in demand for home-grown fencing may be due to the decline in influence of the big DIY sheds: people are turning to their local builders' merchant instead for fencing products. Agricultural fencing business has been affected by the long dry summer with the ground being too hard to work. This sector has picked up a little more recently. On the flip side imported fence panels and associated products have had a steady year. However 2019 may bring an opportunity for more sales of imported products, to fill the anticipated shortfall in home-grown. Given the continuing shortfall of raw material from British forests, UK mills may struggle to build enough stock to fulfil the demands of the new season in 2019. It is fair to say that log prices are not coming down so we foresee flat to firm pricing in Q1 next year," Richard Greenaway says.

Photo: Anglo Norden

Marketing and quality for Softwood Mouldings

Toby Lewis, Head of Merchant Sales at SCA Wood UK says quality and marketing will influence moulding sales in 2019.

He tells Timber Forum News: *"The current high global demand for softwood plus the Brexit potential have been exercising minds in relation to availability and stock movements. t may be advisable for merchants to stock up a little in Q1 next year to mitigate any potential problems,"* Toby Lewis says.

He continues: *"For 2019, the business opportunity in softwood mouldings lies in galvanizing your marketing around the products, which can represent up to 30% of a merchant's timber offering. Focussing on how best to market your mouldings to builders and homeowners as we move towards spring RMI work will energise your sales after winter. Focussing too on quality will give you a marketing differentiator over competitors. SCA will be launching new support for merchants on this early next year."*

Photo: SCA Wood

Great Expectati

Customers' view and advice

Looking from the opposite perspective, we have explored h

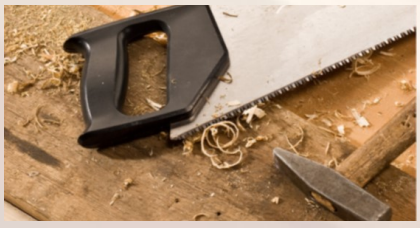
The Carpenter:
Hardwood selection & knowledge lacking

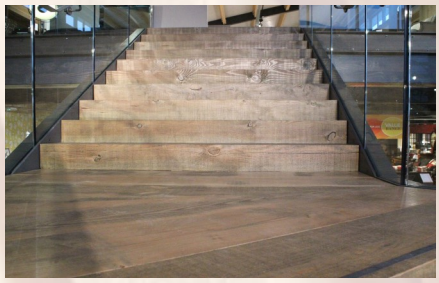
The Institute of Carpenters represents around 800 members across the UK who buy a wide selection of timbers from both builders' merchants and specialist timber merchants.

Fellow of the Institute, Marcus Jahrling, has seen many changes in timber supply over the years but finds the recent spate of price rises are affecting business. He told BMF Timber Forum News: "*I've been involved in the timber trade all my life but timber has now largely increased in price: it's a significant factor for most businesses.*

"There's also a limited stock of hardwoods at many builders' merchants, and a lack of knowledge," Marcus Jahrling continues. *"One merchant wanted to sell me Meranti when I needed Mahogany. Meranti isn't as dense or as durable as Mahogany for external use. It underlines the need for merchant counter staff with in-depth timber knowledge,"* he affirms.

Has Marcus Jahrling been affected by a lack of availability in other timber species? *"It's difficult to get hold of Oak and also Beech, though softwood supplies are generally fine. I've found it necessary to go to either a specialist timber merchant or to one of the bigger merchants to get what's needed."*





The Shopfitter:
'Sustainable timber sourcing is essential'

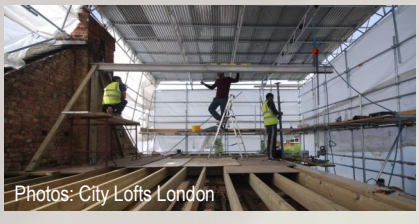
Shopfitters straddle the divide between skilled crafts and design-led specifiers. With retailers increasingly exploiting the look and texture of timber to create a 'natural' feel to the both retail centres and hotels, shopfitters are on the front line of sourcing precise specifications on timber and wood products. What do shopfitters most need from merchants, and how do they like to buy their wood? Vaughan Chopping, former President of the National Association of Shopfitters (NAS) and Director at Target Shopfitters, tells Timber Forum News: *"With some architects and specifiers, shopfitters get no choice on timber, laminate or veneer supplier, as it will be detailed in the specification,"* he reports. *"When we're working under our own auspices, however, we much prefer being able to get our day-to-day needs, like battening and plywoods, and our decorative surfaces, from a single source.*

"Sustainably-sourced timber is also an absolute essential in the shopfitting business," Vaughan Chopping explains. "If the timber or wood product is not certified to a recognised scheme like FSC® then NAS members won't entertain it," he says.

Timber quality is an issue which concerns today's shopfitters, according to Vaughn Chopping: "*Our members have noticed that timber quality has gone down over the past 10-12 years: it's not what it was. There are too many knots in some timbers, which means more wastage for us when we use it, thus more remedial time spent dealing with it. Both can impact on NAS members' profitability,*" Vaughan Chopping concludes.

Photo: Marley Eternit

The Specialist:
Relationships are key



Photos: City Lofts London

The Federation of Master Builders' Q3 State of the Trade survey revealed almost 60% of members are struggling to recruit enough carpenters and joiners for their business. This puts extra stress on builders' time when dealing with ordering timber, but adds extra value to the timber knowledge offered by builders' merchants, as Deepak Singh Udassi, managing director of FMB member City Lofts London, explains: *"Due to the nature of our work, we don't often need to go to a merchant to select stock for ourselves. We have our quantities and buying list worked out, and we tend to place orders over the 'phone and have materials delivered direct to site. We've built relationships with reliable local merchants over time. When we do have to use a different merchant, we opt for the independents first if we can,"* Deepak Singh Udassi relates.

ions in timber?

on merchant timber supply

ow merchants' clients managed their timber buying in 2018

Photo: DTF Building Services

The Builder:
Products' quality matters

Quality has been lacking this year, feels David Flynn, managing director of FMB members DTF Building Services in Cambridge. "*In general timber shortages have not been a problem for us, although quality of material is becoming an issue. I am definitely seeing timber being stocked that's of an inferior quality to, say, five years ago.*

"It now seems common place, even accepted, that PAR timber will be full of knots and shakes, and we have to spend a significant amount of time sorting through the stock to find the real quality," David Flynn comments.

"We are looking for more quality, not less! I believe one thing which needs looking at further is the way the timber is stored at the merchant's. The summers we are having seem to be giving us long periods of very high temperatures and then sustained wet periods. This has meant all timber stored in the open air and not covered is liable to twist and shake far more frequently, thus producing poor quality. This must be a concern as well for the merchants, from a waste perspective." David Flynn adds.

He continues: *The price of MDF seems to have gone through the roof – I really don't know why. Some feedback from suppliers would be welcome. Without knowing the facts we builders look at the situation and just assume the merchants are making huge profits. Maybe that's not the case?*

"We are seeing a decline in product knowledge at the merchant's," David Flynn reveals. *"It seems to be the outcome of the modern training ethos: give all new employees a few days or weeks on one particular department and, just as they are starting to become proficient, move them to a different department. The saying 'Jack of all trades and Master of none' comes to mind. Many times I've questioned the business logic of having more staff but with little knowledge each. The knock-on effect from our perspective is the real in-depth product knowledge isn't there any more."*

"They earn their keep through their knowledge, and we get much better advice than at local branches of national merchant chains. The staff at the independent we use regularly know their timber. They are the driver for expanding our knowledge of new products and materials - and their enthusiasm is catching." The FMB's Q3 survey also showed that 86% of builders anticipate further material price increases in coming months. Deepak Singh Udassi concurs: *"Since the Brexit vote, we have seen prices rise across the spectrum of materials: insulation has risen more than timber, even though most timber comes in from abroad. We've not experienced a lack of availability yet in day-to-day materials, but lead times for more decorative timbers such as Larch, Cedar and Maple have definitely increased. Merchants also carry less stock than they used to so usually we're not able immediately to find supplies of more specialist materials."*

The Joiner:
Availability and pricing

As we saw earlier this year at the TTF's Oak supplies conference, availability and pricing of certain hardwoods and modified woods are affecting the joinery industry, as Darren Young, Production Director at Gowercroft Joinery explains: *"We use predominantly laminated scantling window sections in manufacturing. We've had problems getting European Oak sections in the size we need recently: one supplier quoted us a four-week delivery time. Supplies of Red Grandis have been fine but there's a worldwide shortage of Accoya, which we use a lot, and that has caused a few problems.*

"From our perspective we have to shop around quite a bit these days to get the material and section sizes we need. Generally we get pretty good service and find a good knowledge level at timber-specialist merchants.

"Timber prices have been going up and this does affect us, as we quote fixed prices to clients. Our quotes are valid for three months so we have had to absorb additional costs where prices have gone up within that time. The shortage of Accoya has certainly given distributors a business advantage. Our only consolation is that all UK window manufacturers have been similarly affected by pricing, so we're all in the same boat, competitively speaking."

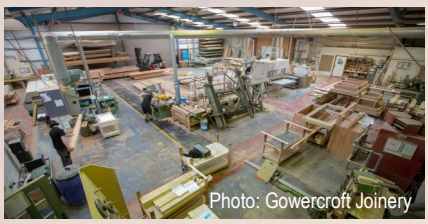


Photo: Gowercroft Joinery

Working across the Timber Supply Chain

Timber Forum Agenda, John A Stephens Ltd, Tuesday 27 November 2018

The second BMF Timber Forum of 2018, presented in collaboration with the Timber Trade Federation, will be held at **John A Stephens Ltd's Green Energy Centre, Castle Meadow Rd, Nottingham NG2 1AG on 27 November**. Timber sales from both supplier and member perspectives will be discussed alongside homegrown softwood supplies and the impact of Brexit on UK timber supply.
The Forum programme and agenda is below:

09.30	Tea/Coffee and Registration
10.00	**Norman Evans**, F W Morgan, BMF Timber Forum Chairman: *Welcome*
10.05	**Michael Tomlinson,** Manningham Fencing & Decking: *Timber sales from the merchant member's perspective*
10.45	**David Webb,** Norbord**:** *Timber sales from the supplier member perspective*
11.15	Coffee/tea break
11.30	**David Chapman**, BSW Timber: *Homegrown softwood timber supplies*
12.00	**David Hopkins**, Timber Trade Federation: *Impact of Brexit on UK timber supply*
12.30	**Open Forum** chaired by Forum chairman Norman Evans, covering: *the state of trade; product availability/shortages.*
13.00	Networking Lunch
14.00	Event closes

The event, free of charge, is restricted to a maximum of two people per organisation. Booking: visit www.bmf.org.uk/events, or email Richard Ellithorne at richard.ellithorne@bmf.org.uk.

Looking back: June 2018 Timber Forum

Thirty-eight delegates attended the Timber Forum in June 2018 at BMF HQ in Coventry, introduced and chaired by Norman Evans of **FW Morgan.** Norman Evans hoped the meeting would begin a new era of dialogue between suppliers and merchants under his chairmanship.

Richard Liddle of CRS Building Supplies outlined his approach to timber supplies and purchasing, while Simon Henry and Nigel Buckley-Ryan of Södra Wood gave an update on the global softwood markets and their effect on the UK. Andy Hodge from Lonza Wood Treatments detailed the right levels of timber treatments and matching these to the

right end, along with the importance of specifying products correctly from suppliers and giving precise information to merchants' customers.

David Hopkins underlined the TTF's work on plywoods and how to ensure merchants are procuring and selling the correct material.

Merchant & Timber Industry Events Calendar

Winter 2018

4 Dec	EUTR Workshop, TTF, London
6 Dec	London Softwood Club meeting
13 Feb	Timber Trade Journal Wood and Wellness Conference, London
5-7 Mar	Futurebuild, Excel, London
6 Mar	UK Softwood Conference, London TTF Annual Dinner, London

Spring 2019

27-28 Mar	Roofing Cladding & Insulation show, Ricoh Arena, Coventry
3 April	BMF Marketing Forum at Worcester Bosch, Worcester
10 April	NMBS exhibition, Ricoh, Coventry
13-16 June	BMF All-Industry Conference, Dubrovnik
June	BMF Timber Forum, date TBC

Builders Merchants Federation

1180 Elliott Court, Coventry Business Park, Herald Avenue, Coventry CV5 6UB

E: info@bmf.org.uk - T: 02476 854980

W: www.bmf.org.uk

Timber Trade Federation

The Building Centre, 26 Store Street London, WC1E 7BT

E: ttf@ttf.co.uk - T: 0203 205 0067

W: www.ttf.co.uk