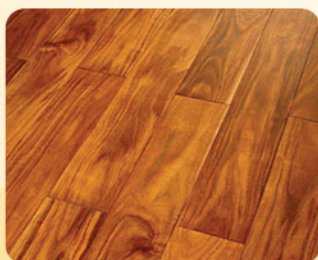
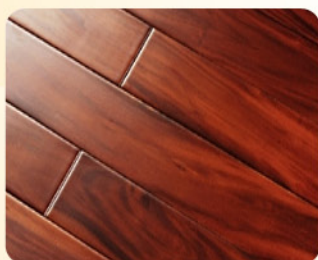


# 2013Q3 Solid Wood Flooring

## Industry Analysis Report

2014.01



**Made-in-China.com**



Produced by IAR Team  
Focus Technology Co., Ltd.

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## 1. Solid wood flooring

Solid wood flooring, also known as wood flooring, is directly processed with solid wood. It has natural wood texture, and is a poor conductor of heat, which can have the effect of warm in winter and cool in summer. It can also bring the best comfort to feet and is safe to use. It is ideal material for bedroom, living room and study room. Solid wood decorative style is to return to nature and with natural texture. Nowadays, forest cover rate is declining and vigorously promote environmental protection, Solid wood flooring is more precious. Solid wood flooring is divided to level AA, level A and level B, among of which, AA level has the highest quality.

- Classification of solid wood flooring

1) Classified by shape: mortise join solid wood flooring, even joint solid wood flooring

2) Classified by lacquered or not on the surface: lacquered solid wood flooring, unlacquered solid wood flooring.

Lacquered solid wood flooring is divided into spray painting and roll painting plate, the floor surface of which has been painted with floor paint, and you can use directly after installation. Unlacquered solid wood flooring is plain plate, the floor surface of which has not been painted, and it must be painted with floor paint after installation. Because plain plate will be polished and painted with floor paint after installation, the surface is smooth and paint film is as a whole, both decorating effect and quality are better than that of lacquered floor, just installation is more time-consuming.

3) Classified by processing technology

(1) Tongue-and-groove wood flooring (Also known as mortise join solid wood flooring or Longfeng flooring). The flooring has opened tongue and groove both in the longitudinal and width direction. Tongue and groove is generally less than or equal to 1/3 plate thickness, and the tongue is slightly bigger than the groove. The back of the vast majority is with anti-deformation groove.

(2) Finger-jointed flooring is combined and glued by same width and different length plates. The combination structure is the same as that of tongue-and-groove wood flooring.

(3) Integrated timber flooring (Mosaic flooring) is spliced with same width small plates and then transverse spliced with multi-pieces finger-jointed plates. This kind of flooring has large width and good dimensional stability.

(4) Parquet flooring is a geometric mosaic of wood pieces used for decorative effect. The production process of this kind of flooring is complex and the precision is also high.

(5) Classicized solid wood flooring is solid wood flooring with the classical style, the surface of which is special processed in artistic form. The superiority lies in its superficial effect which is

formed by artificial carving. Therefore, its unique artistic character cannot be found in plain solid wood flooring.

4) Classified by installation method: which can divided into mortise join solid wood flooring, even joint solid wood flooring and parquet flooring and so on. Nowadays, mortise join solid wood flooring is most popular.

5) Classified by lacquered or not: which can divided into lacquered solid wood flooring and unlacquered solid wood flooring. Nowadays, UV lacquered solid wood flooring is most popular.

6) Classified by wood: which can divided into domestic wood flooring and imported wood flooring. Domestic wood commonly used are *Betula*, *Fraxinus mandschurica* Rupr., *Xylosma racemosum*, *Fagus longipetiolata*, beech, elm, maple, walnut, ACey mono and so on. The most popular are *Betula*, *Fraxinus mandschurica* Rupr. and *Xylosma racemosum*. Imported wood commonly used are Kempas, Merbau, *Dialium spp* Keranji, Balsam, Ipe, Teak, Bubinga, Courbaril, Cumaru, Kulim, *Tetramerista glabra*, *Massaranduba* and etc.

Solid wood flooring is an important ground pavement material, in the early 1980s of the 20th century, with the reform and opening, people's living level raised, house decoration became an important part of living improving, at the same time, Solid wood flooring also entered ordinary families.

In recent years, China's sustained and steady economic growth, accelerated process of urban and rural construction, fast development of Chinese real estate industry, rapid improvement of people's living standards, continuous rising of home decoration and national industrial policy support provide a good economic environment for solid wood flooring, creating a huge market demand.

Judging from the whole industry, our country sales of solid wood flooring have jumped to the leading position in the world at present. Solid wood flooring in the Chinese market have firmly held the status of high-end home furnishing consumer goods, occupying the high-end market share, unabated. Our country's annual sales volume of solid wood flooring all amounted to about 45 million square meters from 2006 to 2008. The sales volume of solid wood flooring in 2009 amounted to 42 million square meters, the same as that in 2008. Such a huge amount of sales reflected that our national income level and consumption level were in a rapid increase, consumers tended to choose high-end consumer products and solid wood flooring products occupied an important position in the social life.

Solid wood flooring enterprises are numerous in China, but the scales of individual enterprises are generally small all the time. The enterprises are obviously scattered and small. With the further development of market polarization, this situation will gradually be reversed. Domestic high-end consumer groups are not sensitive to the floor price changes, but they pay more attention to product quality, shopping environment and good service. Large enterprises and famous brands can better satisfy the needs of above customers, so some national strong brands will occupy more and

more market share.

With the change in price and market environment, China solid wood flooring market consumer groups have also undergone major changes. Due to the global shortage of timber supply, the price of solid wood flooring continued to rise. The vast majority of purchasers of solid wood flooring are middle or high-income families. Solid wood flooring aristocratic trend has been gradually formed.

Speeding development of China's wood flooring industry also benefited from tempering in all kinds of crisis in the market both at home and abroad. Influenced by timber market fluctuations triggered by tsunami in 2004, and then solid wood flooring price increasing and consumption declining and more intense market competition caused in 2005, especially the policy of solid wood flooring in the domestic market imposing 5% consumption tax in 2006, these solid wood flooring enterprises are pushed to the forefront. Therefore, China wood flooring industry should plan the prospect goal, adjust strategy mentality and actively build a strong brand to promote the sustained and healthy development of solid wood flooring.

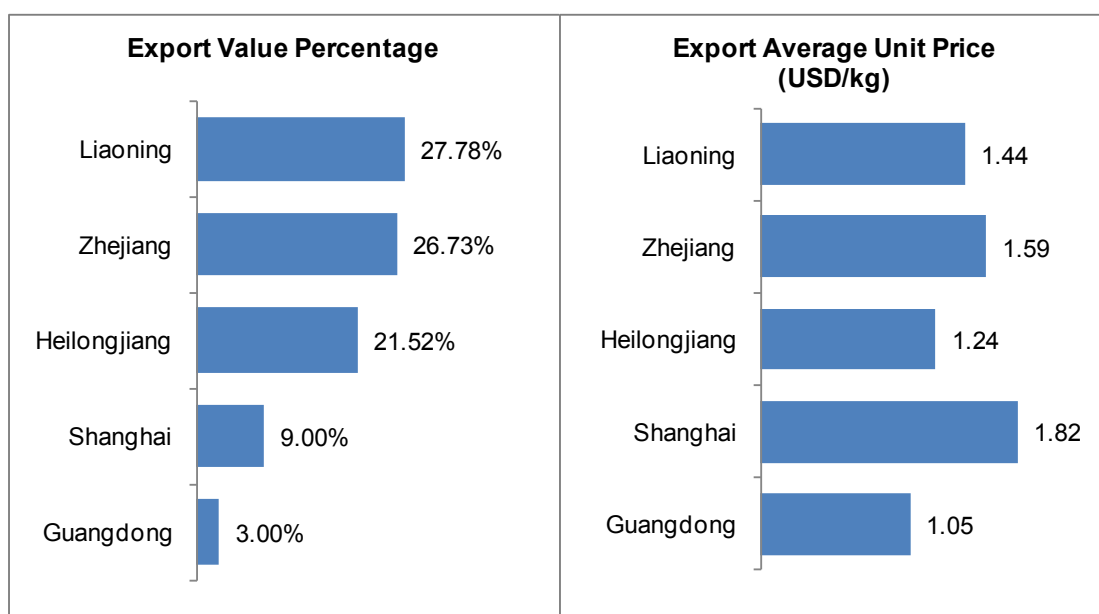
As people tend to pursue living attitude of environmental protection and nature original ecology, solid wood flooring has become the first choice for home decoration. Flooring materials enter into healthy turnover, which lay a solid foundation for the flooring industry. Solid wood flooring will also become mainstream product in the future market.

(Source: Jiuzheng Building Materials Network)

## 2. China Solid Wood Flooring (HS: 440929) Export Source Areas from Jan. to September in 2013

HS Code	Product Name
440929	Other nonconiferous wood, continuously shaped along any of its edges or faces, hereinafter referred to as "solid wood flooring"

Regions	Volume (kg)	Value (USD)	Compared to the same period of last year	
			Volume	Value
Liaoning	42,280,849	61,043,409	-10.2%	-11.4%
Zhejiang	36,844,082	58,742,850	-8.6%	-7.8%
Heilongjiang	38,212,626	47,292,559	-9%	-17.9%
Shanghai	10,884,735	19,769,617	-18.2%	-5.9%
Guangdong	6,264,073	6,601,887	-22.8%	-1.8%
Jiangsu	4,461,701	6,465,973	-35%	-34.8%
Fujian	5,110,422	6,420,543	-10.9%	-16.2%
Jilin	2,665,864	4,718,122	-64.2%	-52.8%
Shandong	1,730,421	3,127,198	-3.9%	4.2%
Jiangxi	1,511,693	2,300,644	0	0



China solid wood flooring exportation mainly came from Liaoning, Zhejiang and Heilongjiang. The solid wood flooring export volume of Liaoning accounted for 27.74% of China's total export volume of the product from Jan. to September in 2013, while the export value accounted for 27.78% of the total export value. The export volume of Liaoning accounted for 24.17% of China's total export volume of the product from Jan. to September in 2013, while the export value accounted for 26.73% of the total export value.

Among China's top five regions ranked by export value of solid wood flooring from Jan. to September in 2013, the export unit price in Guangdong was 1.05 USD/kg, which was the lowest.

Source: Customs Information Network

### 3. China Solid Wood Flooring (HS: 440929) Export Trend Analysis from Jan. to September in 2013

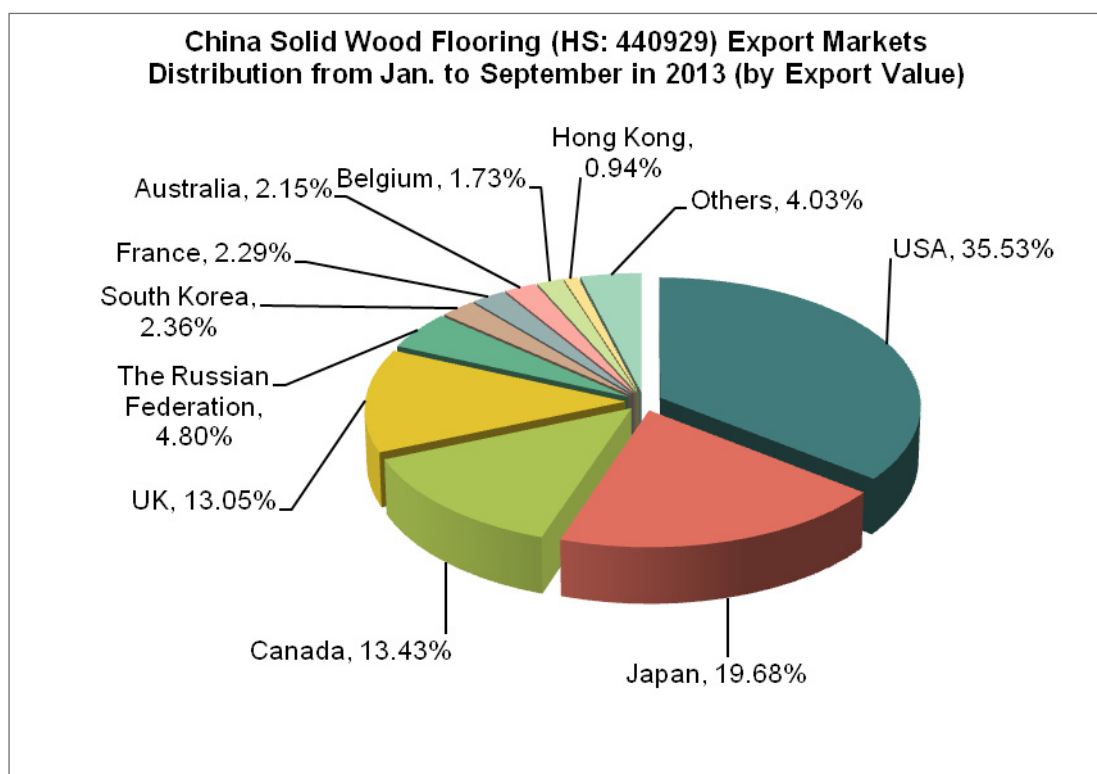
#### 3.1. China Solid Wood Flooring Export Volume and Value from Jan. to September in 2013

Month	Volume (kg)	Value (USD)	Compared to the same period of last year	
			Volume	Value
January	19,484,616	27,915,189	-14.3%	-13.9%
February	10,226,058	14,622,063	20%	15.3%
March	13,485,604	18,922,660	-30.5%	-33.2%
April	18,367,262	27,568,015	-11.9%	-9.5%
May	19,769,220	28,461,811	-6.1%	-5.6%
June	18,532,143	25,705,471	-12.2%	-13.7%
July	18,618,881	27,484,725	-9.5%	-4.6%
August	17,039,817	24,921,504	-21%	-21.6%
September	16,892,203	24,174,105	-19.8%	-20.5%
Jan. to September Total	152,415,804	219,775,543	-13.8%	-13.8%

China's export volume of solid wood flooring from Jan. to September in 2013 amounted to 152,400 tons, with a decrease of 13.8%, while the export value amounted to 220 million US dollars, with a decrease of 13.8% compared to the same period of last year.

## 3.2. China Solid Wood Flooring Major Export Countries/Regions Distribution from Jan. to September in 2013

No.	Countries	Volume (kg)	Value (USD)	Compared to the same period of last year	
				Volume	Value
1	USA	53,036,483	78,087,958	4.7%	11.7%
2	Japan	32,238,062	43,260,290	20.9%	19.4%
3	Canada	20,259,030	29,517,181	-32.5%	-33%
4	UK	19,361,313	28,682,095	-31.2%	-30.2%
5	The Russian Federation	5,807,051	10,541,818	-35%	-34.8%
6	South Korea	4,641,294	5,191,794	-18.9%	-26.9%
7	France	3,254,432	5,042,533	-52%	-58.4%
8	Australia	3,876,276	4,730,956	30.2%	32.4%
9	Belgium	2,790,183	3,791,874	-32.3%	-31%
10	Hong Kong	1,447,601	2,072,358	-38.2%	-20.3%

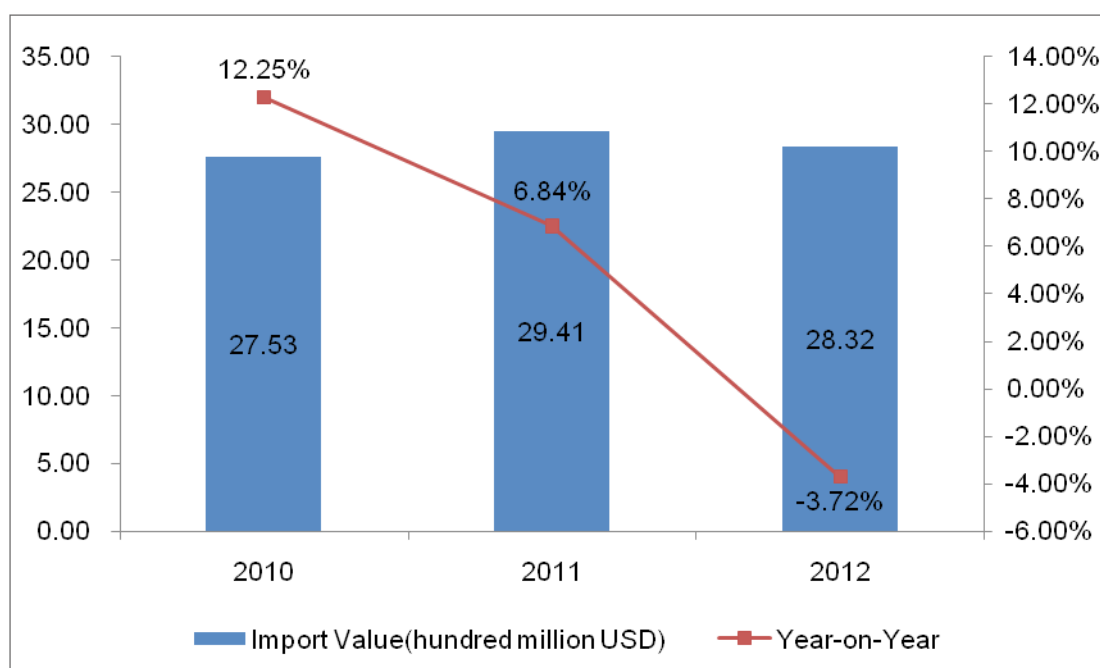


China's main export markets of solid wood flooring were the United States, Japan, Canada and the United Kingdom and etc. from Jan. to September in 2013. The export value to the four countries accounted for 35.53%, 19.68%, 13.43% and 13.05% respectively of our country's total export value of the product and totally accounted for 81.70%. The four countries were our country's main export markets of solid wood flooring.

Source: Customs Information Network

## 4. Global Demanding for Solid Wood Flooring (HS: 440929) Analysis

### 4.1. The Trend of Global Demand for Solid Wood Flooring from 2010 to 2012



The total import value of global solid wood flooring showed an inverted V shape trend from 2010 to 2012, and the import value of 2012 amounted to 2.832 billion US dollars, with a decrease of 3.72% year on year.

## 4.2. Solid Wood Flooring Major Demanding Countries from Jan. to June in 2013

Major Import Countries/Regions	Import Value of Jan.-June 2013 (thousand US dollars)	Year-on-Year
USA	148,324	-0.99%
Japan	125,581	12.73%
Canada	105,589	-13.59%
France	97,162	-22.43%
UK	95,998	17.94%
Germany	77,929	-27.42%
Australia	75,921	-25.49%
The Russian Federation	49,049	353.74%
Italy	46,369	-23.08%
Belgium	42,293	-20.16%

Global solid wood flooring main importing countries/regions are the United States, Japan, Canada, France, the United Kingdom, Germany, Australia, the Russian Federation, Italy and Belgium from Jan. to June in 2013. It is noteworthy that the Russian Federation's import value of solid wood flooring increased by 353.74% year on year, which was a large increase.

Source: UN COMTRADE

## 5. Solid Wood Flooring Major Export Countries/Regions from Jan. to June in 2013

Major Export Countries/Regions	Export Value of Jan.-June 2013 (thousand US dollars)	Year-on-Year
Indonesia	235,388	-11.69%
China	143,186	-12.64%
Brazil	123,675	-29.58%
USA	103,421	3.37%
Malaysia	97,849	-20.72%
Poland	70,042	11.07%
Italy	63,332	1.51%
Germany	36,073	-0.15%
Belgium	32,634	-19.33%
Peru	29,249	0.24%

According to statistics of Jan. to June in 2013, Indonesia was the largest exporter of solid wood flooring. Indonesia's export value of solid wood flooring from Jan. to June in 2013 amounted to 235 million US dollars, with a decrease of 11.69% compared to the same period of last year, followed by China, with the export value of 143 million US dollars, with a decrease of 12.64%.

Source: UN COMTRADE

## 6. The United States Solid Wood Flooring (HS: 440929) Import Trend Analysis from Jan. to August in 2013

Countries/Regions	Import Value of Jan.-August 2013 (thousand US dollars)	Year-on-Year	Percentage
Total	204,911	-1.63%	100.00%
China	63,562	4.47%	31.02%
Brazil	53,208	-9.10%	25.97%
Malaysia	20,773	-31.02%	10.14%
Indonesia	13,833	33.43%	6.75%
Canada	13,788	-1.09%	6.73%
Italy	9,454	15.11%	4.61%
Peru	6,978	32.21%	3.41%
Mexico	3,743	-11.68%	1.83%
Paraguay	3,576	108.76%	1.75%
Vietnam	3,090	-32.88%	1.51%

From Jan. to August in 2013, the United States' import value of solid wood flooring amounted to 205 million US dollars, with a decrease of 1.63% year on year. China is the United States' largest import source country of solid wood flooring, accounting for 31.02% of the total import value, followed by Brazil, accounting for 25.97% of the total import value.

## 7. Australia Solid Wood Flooring (HS: 440929) Import Trend Analysis from Jan. to September in 2013

Countries/Regions	Import Value of Jan.- September 2013 (thousand US dollars)	Year-on-Year	Percentage
Total	119,043	-19.00%	100.00%
Indonesia	81,892	-21.92%	68.79%
Malaysia	22,101	-7.63%	18.57%
China	7,656	5.50%	6.43%
Italy	1,868	36.35%	1.57%
USA	860	53.02%	0.72%
Vietnam	832	-5.45%	0.70%
Brazil	576	-82.58%	0.48%
Fiji	390	-32.29%	0.33%
Peru	361	-49.93%	0.30%
New Zealand	318	-72.75%	0.27%

From Jan. to September in 2013, Australia's import value of solid wood flooring amounted to 119 million US dollars, with a decrease of 19.00% year on year. Indonesia is Australia's largest import source country of solid wood flooring, accounting for 68.79% of the total import value, followed by Malaysia, accounting for 18.57% of the total import value. China ranked the third, accounting for 6.43% of the total import value.

## 8. Japan Solid Wood Flooring (HS: 440929) Import Trend Analysis from Jan. to September in 2013

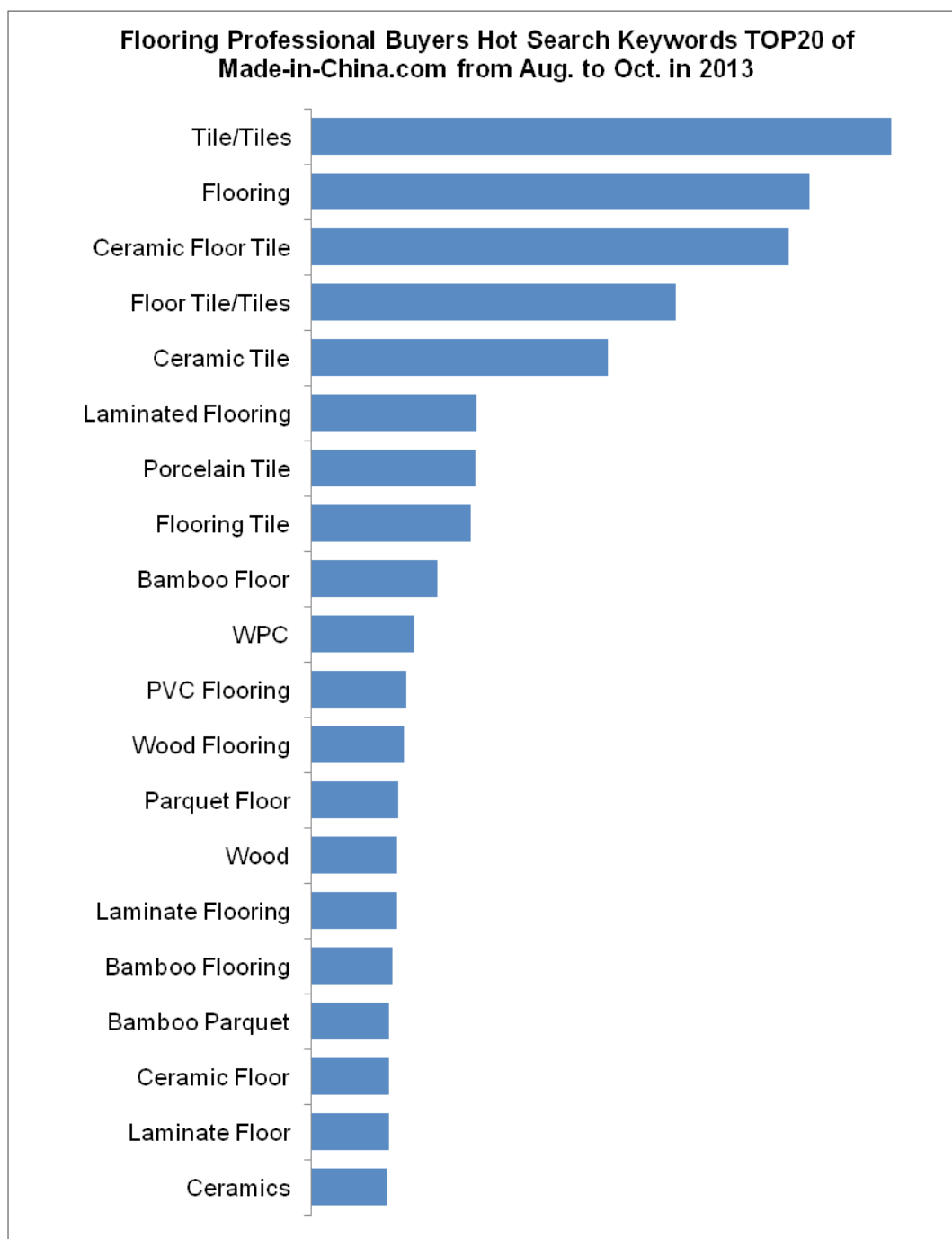
Countries/Regions	Import Value of Jan.- September 2013 (thousand US dollars)	Year-on-Year	Percentage
Total	187,823	10.01%	100.00%
China	91,790	22.30%	48.87%
Indonesia	34,132	-10.72%	18.17%
Vietnam	18,126	73.02%	9.65%
Malaysia	15,668	-16.07%	8.34%
Brazil	10,136	-4.47%	5.40%
Thailand	4,607	-5.77%	2.45%
Philippines	2,603	6.77%	1.39%
Myanmar	2,460	1.40%	1.31%
Canada	1,347	8.63%	0.72%
Laos	1,221	63.45%	0.65%

From Jan. to September in 2013, Japan's import value of solid wood flooring amounted to 188 million US dollars, with an increase of 10.01% year on year. China is Japan's largest import source country of solid wood flooring, accounting for 48.87% of the total import value, followed by Indonesia, accounting for 18.17% of the total import value.

## 9. Flooring Industry Data Analysis of Made-in-China.com

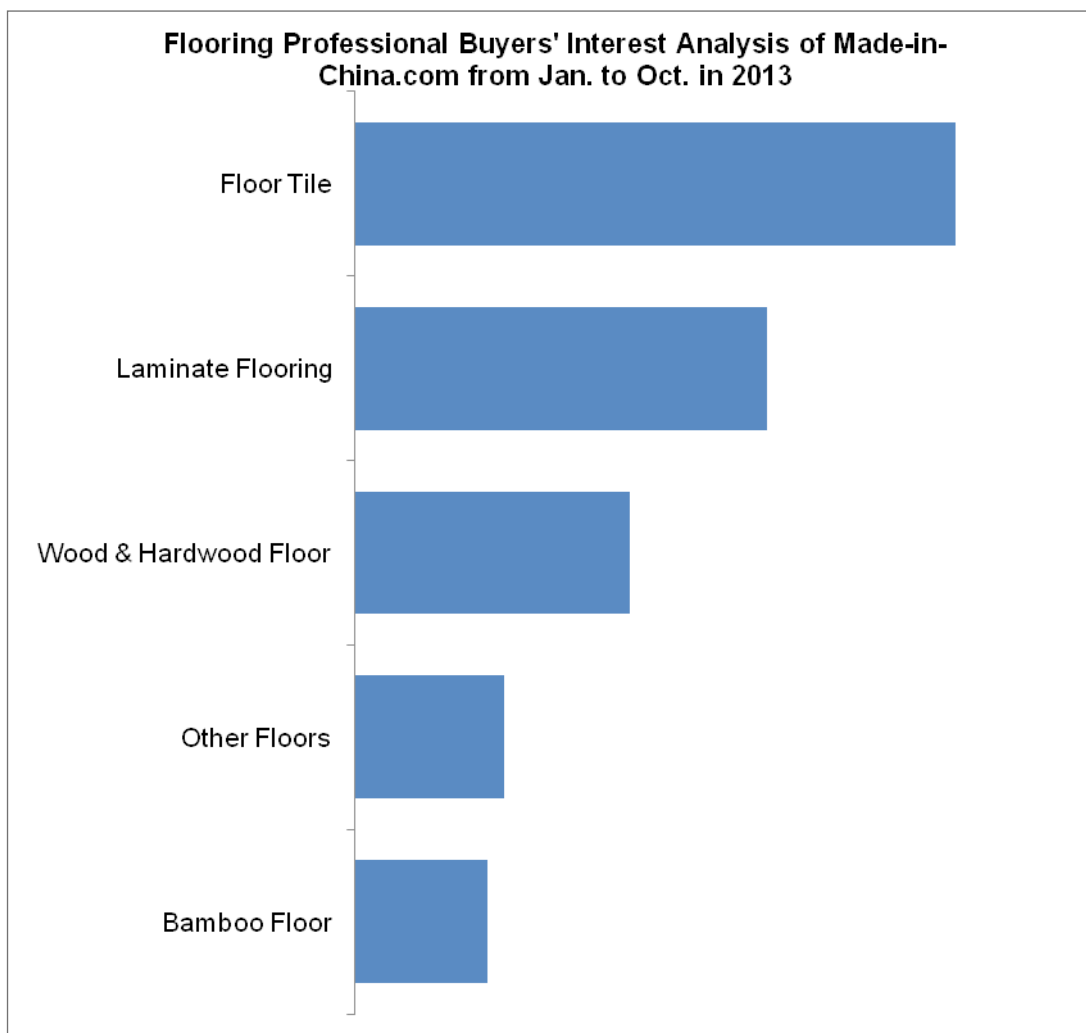
### 9.1. Flooring Professional Buyers Hot Search Keywords of Made-in-China.com from August to October in 2013

Flooring Professional Buyers Hot Search Keywords TOP20 of Made-in-China.com from August to October in 2013



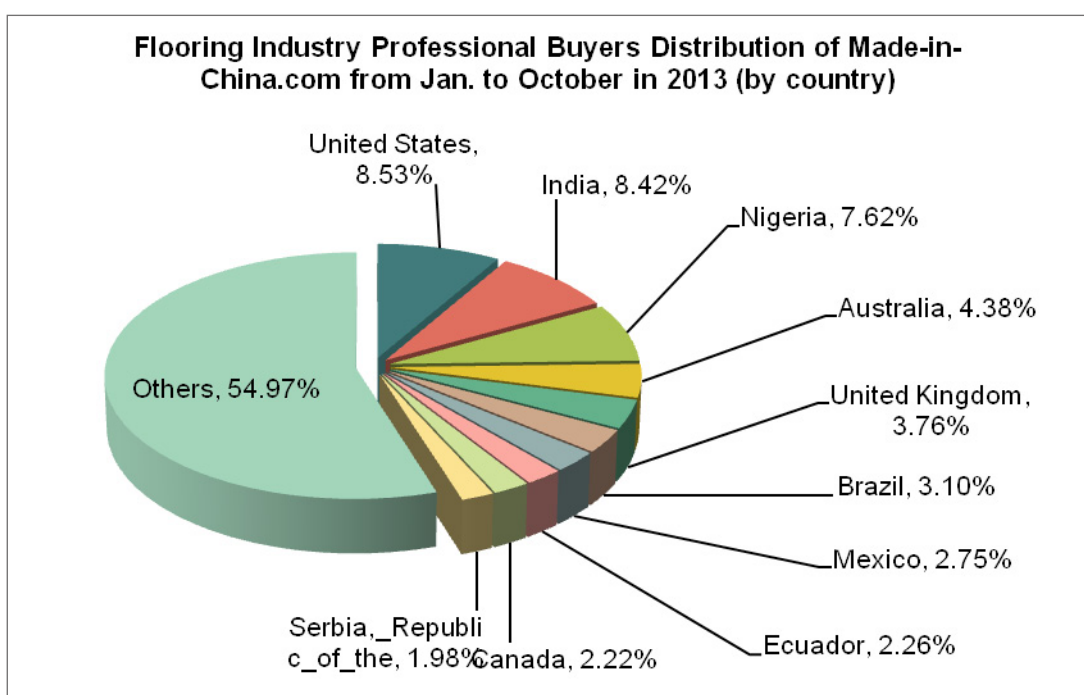
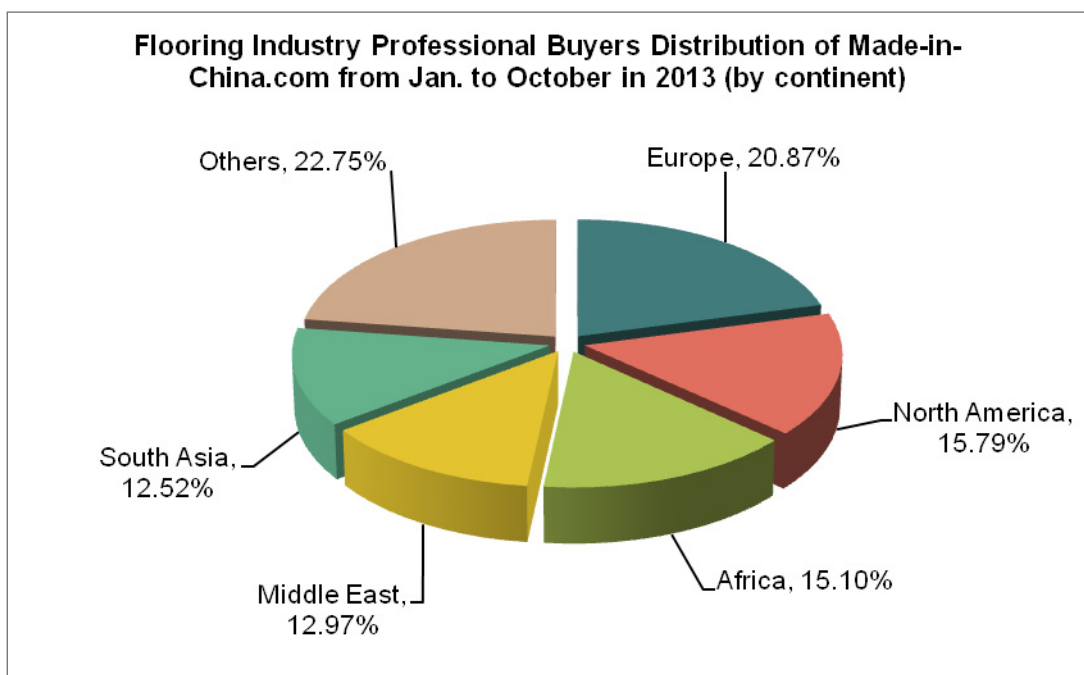
Flooring professional buyers the hottest search keyword from August to October in 2013 was Tile(s), followed by Flooring.

## 9.2. Flooring Professional Buyers' Interest Analysis of Made-in-China.com from Jan. to October in 2013 (by click)



According to the statics of Made-in-China.com from Jan. to October in 2013, among various sub-sectors of flooring industry, buyers paid the highest attention to Floor Tile, followed by Laminate Flooring.

## 9.3. Flooring Professional Buyers Distribution of Made-in-China.com from Jan. to October in 2013



By continent, inquiries of flooring industry on Made-in-China.com from Jan. to October in 2013 were mainly from Europe, North America, Africa, the Middle East and South Asia and other regions. From Jan. to October in 2013, inquiries of flooring industry on Made-in-China.com were mainly from the United States, India, and Nigeria, among of which, the inquiries from the United States accounted for 8.53% of the total inquiries.

Source: Made-in-China.com

The IAR Team of Made-in-China.com dedicates to surveying,excavating and collating industry information for supplying the service of timely and exact information analysis, providing necessary information and dates for clients'decision.

Thanks for reading the report, if you have any questions,opinions or advices, please contact us.

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