

wood flooring Asia

VOL. 1, 2014

For solid wood and engineered flooring 全方位报道与实木、竹与复合地板等行业相关的信息

亚洲木地板

WOOD FLOORING ASIA • VOL. 1 2014 • 亚洲木地板 • 1 卷 • 四 季 第 一 期

MCA/P/173/07/2012 • ISSN 2024 1000

A NOTE TO ARCHITECTS, BUILDERS AND SPECIFIERS: TIMBER IS THE ULTIMATE 'GREEN' CONSTRUCTION MATERIAL

木材是终极的“绿色”建筑材料

CHINA'S NATIONAL FOREST CERTIFICATION SYSTEM ACHIEVES PEFC ENDORSEMENT

中国森林认证体系与PEFC实现互认

BUT THE TREES ARE STILL THERE!

树, 就在那里



Photo courtesy of BKB Hevea Products Sdn Bhd
(Malaysian Kempas floor)



American Walnut flooring made in Vietnam for Japan

Vietnam Flooring Industry — A fresh look in 2014

越南地板业——2014年新展望

By World Hardwoods | 作者：全球硬木

There is little doubt that the wood processing industry in Vietnam continues to march forward. According to one Vietnamese government source, exports of wood products – mainly furniture – in 2012 were valued at US\$3.4 billion, up 18 per cent from 2011. This was projected to rise a further 4 per cent for 2013. Many China-based furniture factories have also been setting up in Vietnam, but what about the wood flooring manufacturing sector?

According to a recent statement from Vietfores – the forest products association based in Hanoi: “Vietnamese furniture has been made available over 120 countries, and the US is rated as the consumer sharing 41 per cent of Vietnamese furniture exports, followed by the EU at 28 per cent and Japan at 13 per cent. Vietnam is also the largest furniture exporter in Southeast Asia and the Vietnamese wood industry is in the process of negotiating a Voluntary Partnership Agreement (VPA) with the EU.” Unlike the wood furniture industry which is still dominated by Taiwanese investors – estimated to

毫无疑问越南的木材加工业将继续发展。据来自越南政府的消息，2012年越南出口木材产品（大多数是家具）价值340万美元，比2011年增长了18%，估计2013年的增长为4%。中国很多家具厂也纷纷在越南开设工厂，但是木地板制造领域情况如何呢？

越南木材制品协会（Vietfores）在最近发布的一项声明中说到：“越南家具已远销超过120个国家，其中41%出口到美国，28%到欧盟，13%到日本。越南同时也是东南亚最大的家具出口国，且越南木业正与欧盟磋商签订自愿伙伴关系协议（VPA）。”不同于被台湾投资者掌控（就是说他们掌控了半数以上的产品）的木家具业，地板业由越南本国人掌控，遍及整个国家，从北到南分布均匀。这些生产商的规模大小不等，销售方向也不尽相同：从主要用于出口到专供国内市场。说到这里，一个有趣的现象就是地板制造商越来越倾向于从出口转为内销，特别是在2008年全球金融危机之后，诸多西方地板市场都受到了严重影响。越南旅游休闲产业的发展以及人们对设计和改变生活方式的兴趣推动了本地硬木地板市场的发展。



Austrian 'Wintersteiger' equipment in Vietnam



Engineered flooring production in Vietnam



Local species flooring made near Saigon

control more than half of all production – the flooring industry is dominated by Vietnamese nationals spread quite evenly across the country from North to South. They range from large to small producers and vary in their sales: from mainly export to domestic-market-only suppliers. Having said that, there is anecdotal evidence that flooring manufacturers are increasingly turning away from exports and turning towards domestic sales, especially since the 2008 global crisis, which badly affected many western flooring markets. The rise of the tourist and leisure industries in Vietnam and increased interest in design and changing lifestyles have been market drivers for real hardwood flooring locally.

Nobody seems quite sure about the number of wood flooring plants in Vietnam, but there appears to be at least a dozen significant plants – most of which are around Saigon, in the South, with a few in Hanoi/Haiphong, and some in Central Vietnam.

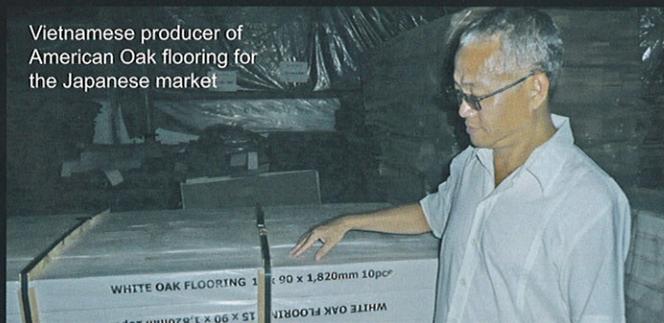
Flooring plants in Vietnam also vary hugely in capability, from basic sawmilling of logs and the production of solid flooring, to plants that produce sophisticated engineered flooring, which is held in high regard in a number of prime markets – notably Japan. The contrasts are remarkable in the sense that some plants are old with outdated, mainly Taiwanese equipment in need of repair and maintenance; whereas others use state-of-the-art German, Austrian and Italian woodworking machinery, which are able to produce high quality products sold to key export markets. There are also variations in the species popular in the North and South of Vietnam; American Oak is the predominant imported species in the South, while Ash is the preferred species in the North. However, local and regional (Cambodian and Laotian) species are still central to the wood flooring industry at this stage. In

我们无法确定越南木地板工厂的确切数量，但是至少有12家大型工厂，其中大多数在南方的西贡附近，少数在河内及海防，还有一些在中部地区。

越南各木地板工厂种类悬殊，从基础的原木锯木场，到实木地板生产商，再到生产高档复合地板的工厂不一而足，那些精致的产品在很多高端市场，特别是在日本广受好评。产品设备的差距也非常巨大，一些工厂很陈旧，设备主要来自台湾，早已过时，需要维修和保养，而另一些工厂则使用德国、奥地利、意大利产的先进木工机械，生产高质量的产品，销往重要的出口市场。越南南北两地流行的品种也不同，南方最流行的进口树种是美国栎木，而北方更偏爱白蜡木。不过，本地和区域（柬埔寨和老挝）树种目前仍然是木地板业的核心。在这两个市场中，美国胡桃木都在力争一席之地，特别是日本市场的出口业务，那里是越南产品最热销的市场之一。因为日本进口商对产品的质量规范要求严格，所以能进入日本市场本身就说明了工厂的生产能力以及何为朝阳产业。

木地板业也许只是个小产业，但是却极为多元化。不过，考虑到越南有9000万人口，并且生活水平逐渐提高，除了出口的大门可能向越南生产商敞开之外，国内市场也可能会迅速扩张。与中国的地板制造能力相比，越南还有很长的路要走，但是至少有增长的迹象。最近的调查显示，不同制造商在产品类型、质量、提供的选择上都有非常大的差异。一些工厂是从锯木开始（包括本地和进口树种），向生产实木地板的方向发展。其他工厂进口俄罗斯桦木胶合板作为复合木地板基材，可与多种可选表面材料搭配销售。

越南政府希望减少对进口木材的依赖，强调使用本地木材资源，从而节省外汇，发展农村就业，促进纤维制品的自给自足。农业和农村发展部（MARD）已经批准了若干林业重建项目，以增加森林面积，鼓励商业生产。该政策鼓励对以本地木材为基材



Vietnamese producer of American Oak flooring for the Japanese market

both cases, American Walnut is also sought after, especially for export to the Japanese market, which seems to be one of the favourite destinations for Vietnamese production. Given the strict quality specification demanded by Japanese importers, this in itself is an indication of what can be produced, by what is essentially a sunrise industry.

The wood flooring industry may be very small, but it is extremely diverse. However, given Vietnam's population of 90 million, which has an increasing standard of living, the domestic market could expand quickly, in addition to the possibility of export opportunities opening up for Vietnamese producers. There is a very long way to go, when compared with China's floor manufacturing capacity, but there are at least signs of growth in Vietnam. Recent visits there revealed a great disparity between the different manufacturers in terms of type and quality, as well as the choices offered. Some start with sawing logs – both local and imported species – and work their way towards producing solid flooring. Other plants import certified Russian Birch plywood as substrate for their engineered flooring with a wide range of face material on offer.

The Vietnamese government wishes to reduce dependence on imported wood and place greater emphasis on local wood sources, for reasons like saving on foreign currency, developing rural jobs and for the drive towards fibre self-sufficiency. The Ministry of Agriculture and Rural Development (MARD) has approved some forestry re-structuring to increase forest land and encourage commercial production. This policy could have implications for the flooring industry by encouraging investment in engineered flooring using local plantation substrate materials, and minimising the need for importing high volumes of logs and lumber for solid wood flooring, which is still the norm for domestic consumption where real wood is used.

It is unlikely that Vietnam could ever catch up to either the western industrial nations in wood flooring production – as they have done in furniture – or other ASEAN countries such as Malaysia or Indonesia, which is partly due to a lack of raw material. One Vietnamese commentator suggested that “the main reason the flooring industry isn't developing as well as the furniture industry is because the furniture manufacturing has higher added value that compensates for the higher costs of imported wood, while flooring manufacturing has lower added value, so, Vietnam's only advantage of low labour costs can't make up for other costs.” Nevertheless, the expected growth of the local market is likely to encourage further investment in Vietnam's wood flooring industry.



Hanoi flooring factory



Lime-washed Oak flooring made in Vietnam

的复合地板业进行投资，尽量减少大量进口原木和木材来制造实木地板的需求，虽然这仍是国内实木消费的主流。这项政策对于地板业可谓意义深远。

与越南家具业目前的发展情况相比，越南的木地板产品很难赶上其他西方工业国家以及马来西亚或印尼等其他东南亚国家，部分原因是由于其原材料的缺乏。越南一位评论员指出：“地板业没有家具业发达的主要原因是家具具有更高的附加价值，弥补了进口木材的高昂价格，而木地板的附加价值较低，越南唯一的廉价劳动力优势无法弥补其他开销。”尽管如此，本地市场的预期增长将可能为越南木地板业吸引更多投资。WFA