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# Market Research Report

An advise for Hoogenhoff how they should position their sales in order to increase their market share on the UK Hardwood market

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# Market Research Report about the use of European Oak in the UK

An advise for Hoogenhoff how they should position their sales in order to increase their market share on the UK Hardwood market

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## Preface

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This is a Market research report about the hardwood market in the United Kingdom, concentrating on the trade and use of European Oak, with an additional marketing advice for Houtimport van den Hoogenhoff how they should position their sales into the UK hardwood market.

The research was conducted in the framework of my graduation at Van Hall Larenstein University of Applied Science. I would like to thank all the employees of my client company, Houtimport van den Hoogenhoff, for helping with writing this thesis by providing information and facilities in order to conduct proper research. In particular I would like to thank T. van den Hoogenhoff and B. van den Hoogenhoff for their supervision. Furthermore I would like to thank my supervisor at Van Hall Larenstein University of Applied science, J. Raggers and external expert Robert Everts, who helped me during the process of planning, conducting research and providing feedback.

Sjors van den Beuken

Mill, June 2018



## List of Abbreviations

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UK	United Kingdom
EU	European Union
US	United States
CTI	Confederation of Timber Industries
TTF	Timber Trade Federation
TTJ	Timber Trade Journal
BWF	British Woodworking Federation
NHLA	North American Hardwood Lumber Association
EUTR	European Union Timber Regulations
FSC	Forest Stewardship Council
PEFC	Program for Endorsement of Forest Certification Schemes
SWOT	Strengths Weaknesses Opportunities Threats
EFTA	European Free Trade Association
EEA	European Economic Area
WTO	World Trade Organization
VAT	Value Added Tax
HMRC	Her Majesty's Revenue and Customs



## Summary

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Houtimport v.d. Hoogenhoff is interested in expanding their sales to the export market and in particular to the UK. By analyzing the market, an advise is given to Houtimport v.d. Hoogenhoff how they should position their sales into the UK hardwood market.

This report contains analysis of Houtimport van den Hoogenhoff internal structure, their sales and imports, their experience with the UK market and the competition they are facing. Secondly, analysis of the UK hardwood market with a special focus on the demand, trade and use of European Oak timber.

The United Kingdom is the third largest importer of sawn timber in the World. Importing a volume of 427.000m<sup>3</sup> (Forestry Commission, 2017) in 2016 of which 36,7 percent (Oliver, 2017) represented Oak timber. Oak timber serves a lot of purposes in the UK. The heritage of building Oak framed buildings is still high and the demand for Oak furniture and flooring has increased in the last five years.

European Oak timber is a very popular timber species amongst timber markets in the EU and the UK. Demand for European Oak in Asia, especially China and Vietnam, has increased significantly. Prices for raw material (logs) have risen since 2010 and are on a record height at the start in 2018, see appendix 8, (Bahier, 2018). Although, the demand for Oak furniture, timber framed building and joinery is still high.

On the other hand, the trade between the European Union and the UK could be heavily affected by the outcome of the Brexit. Although the Brexit will start at 29<sup>th</sup> March 2019, negotiations already take place and the EU has approved a .. time for the UK until 30<sup>th</sup> December 2020 for the final outcome and trade effects of the Brexit. At the moment there are only speculations about a possible outcome of the Brexit and during current negotiations the European Union is not willing to give in as the UK is negotiating about the most free movement of goods and services, while the movement of people has to be controlled strictly and jurisdiction should fall under UK law.

The report is based on governmental resources regarding import volumes (Forestry Commission, 2017), expert talks during a conference in London about the market dynamics of European Oak timber, Statistical reports retrieved from the Timber Trade Federation and Brexit information from the parliament (Parliament, 2017). Information about Hoogenhoff's analysis is provided by its employees (Houtimport v.d. Hoogenhoff, 2018). Marketing strategies are retrieved from several sources using the internet.





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# 1. Introduction

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## 1.1 Problem definition

The UK Hardwood timber market is a large market for Oak timber according to Hoogenhoff. Timber traders based in Italy and France ship large amounts of Oak timber to the UK for furniture, flooring and interior building purposes (Hoogenhoff T. v., 2017).

Houtimport v.d. Hoogenhoff trades in high quality Oak timber with almost no visual defects like knots and sap wood. Their Oak timber is being used for high quality furniture, flooring, and interior construction (door- and window frames, doors etc.). However, according to Hoogenhoff, the average timber sold as Prime Quality European Oak, also known as QF1a, on the UK hardwood market contains a slightly lower level of quality than Hoogenhoff imports and sells to its customers concerning the same quality (Hoogenhoff T. v., 2017). Florian Ligno, one of the largest Italian importers of European Oak and exporters of European Oak to the UK confirms this on their website. They state: *“Prime Oak is predominantly defect free. However, limited trace of sap is accepted. Small natural tiny pin knots so popular in European oak is also accepted”* (Florian, 2017). This respectively means that three of the four sides have to be clear, while one side may contain a small knot or a percentage of sap wood (Hardwood Timber Sales, 2017). This while Hoogenhoff only imports the QF1a quality as 4 sides clear with no knots and no sap wood. The Oak timber with these small visual defects sold on the UK market, as they accept these minor defects which influence the price of the timber.

Since Hoogenhoff only sells high quality timber, their average timber price for Prime quality (QF1a) is at the same level or slightly higher than the average price for Prime European Oak timber on the UK hardwood market. Nevertheless, Hoogenhoff is planning to expand their business into the UK hardwood timber market. They see this market as an interesting opportunity for business expansion since a large amount of European Oak hardwood timber is being exported from central Europe to the UK mainly from Italy (18%) and France (14%) (Forestry Commission, 2017). Furthermore the UK hardwood market is one of Europe’s largest markets with a total consumption of 427.000 m<sup>3</sup> of sawn hardwoods in 2016 (Forestry Commission, 2017) (appendix 10). Of this imports, 10,5% of this sawn hardwood consumption is from UK own forestry resources while 89,5% is imported (Forestry Commission, 2017). These imports include Temperate European and American species as well as tropical species from Asia, Africa and South America. Since the UK imports most of its timber, Hoogenhoff looks at the UK hardwood market as a large export market with a lot of use of European Oak timber, imported from the same countries Hoogenhoff obtains their timber from. This is their main reason for the choice of this country to expand their business in the future (Hoogenhoff T. v., 2018).

## 1.2 The aim of the Research

The aim of the project is to provide a marketing advice for Houtimport v.d. Hoogenhoff about the UK hardwood market regarding the sales of their Oak timber. This includes an analysis of the current market situation, how to achieve more market share and how to accomplish this market share by implementing marketing strategies.

The scope is to sell a volume of 500m<sup>3</sup> of square edge, Kiln dried Oak timber within 2 years with a revenue about €750.000,- and a profit percentage of 5% (Hoogenhoff T. v., 2017). Hereafter, is it desirable to grow steadily and aim to sell approx. 1000m<sup>3</sup> on the UK hardwood market. The revenue set by selling 1000m<sup>3</sup> is about €1.500.000,- with a profit percentage of 5% (Hoogenhoff T. v., 2018).

## 1.3 Research Questions

The assignment or research question to be answered as specified by Hoogenhoff is as follows:

*How is Hoogenhoff able to gain more market share on the UK timber market with their dried European Oak timber and how to accomplish this growth in market share?*

This main question is divided into several sub-questions that need to be answered altogether to acquire answers/information needed to support the main question stated above.

- *What is Hoogenhoff's current situation regarding imports, sales and UK market experience?*
- *What is the current market situation in the UK for the trade and use of European Oak?*
- *Who are the main competitors of Hoogenhoff in the UK market for European Oak?*
- *What Strengths and Weaknesses of the Internal Analysis affect the Opportunities and threats of the External Analysis?*
- *Which Rules and Regulations apply concerning European Oak trade to the UK and the influence of Brexit on trade?*
- *Which Marketing strategy needs to be applied to increase the market share?*

These sub questions are of great importance supporting the main question. Furthermore, answered in the exact order like stated above, they are a helpful guideline analyzing the market, market potential, the Brexit and marketing strategies. Each question is linked to the next question which makes the overview simple and clear. This effectively means that the end result is a document, drafted in accordance with the given guidelines (both in writing and its forming process), which gave a thorough answer on the questions stated above. **The final report is a market research report with a marketing advice that outlines what Hoogenhoff should do to market its products effectively to its customers on the markets in the UK.**

## 1.4 Contribution to Durability

The UK hardwood market for European Oak is large. According to a report of Global Wood Markets Overview, over 90% of all timber imported into the UK, including European Oak, is certified with either 100% FSC or PEFC certification or certified with both (GWMI, 2017). This means that most timber is originated from durable managed forests. This contributes to the concept of sustainability or durability. Furthermore European Oak timber is a very durable timber species. It is classified as Durability Class 2, Durable (table 1). Hoogenhoff imports FSC and PEFC European Oak timber mainly from France and Croatia.

Oak timber is a natural resource which stores carbon and releases oxygen. When harvested, the carbon will still be stored in the timber. For this reason, the use of timber (European Oak) is much more durable and environmentally friendly than the use of plastics, steel and other furniture and building materials.

When European Oak timber is being recycled (chipped and burned), it releases the carbon it has stored for years, but the heat generated can be used for warmth or electricity. This makes burning (European Oak) timber CO<sub>2</sub> Neutral.

<b>Durability Class</b>	<b>Designation</b>	<b>Timber Life</b>
1	Very Durable	25+ years
2	Durable	15 - 25 years
3	Moderately Durable	10 - 15 years
4	Slightly Durable	5 - 10 years
5	Not Durable	0 - 5 years

Table 1: Durability class timber species. Source: (Houtimport v.d. Hoogenhoff, 2018)



## 2. Methodology

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This chapter methodology describes how the student planned to conduct research with the methods he has use to answer the main questions with the sub-questions and how to implement the results of the research. In chapter 2.1 Research design, the methods of doing research is described and why it has been used. In Chapter 2.2 data collection, is explained what kind of data was needed, how the data had been collected and for what reasons this data had to be obtained to do proper research and write the final thesis.

### 2.1 Research design

In this chapter is explained which tools will be used to conduct research by desk research and field research.

#### **Desk Research**

Several books and literature have been used to conduct research about the English hardwood market. Furthermore these methods are used for marketing, the marketing mixes and marketing strategies and how to apply them. Also, the internet is used to search for answers regarding the main question and sub questions. To do this google scholar and the library of Van Hall Larenstein have provided data and literature. Books regarding report writing and how to conduct research have been used to help the student writing its final thesis.

To answer the first sub-questions, stated in chapter 1.3, about Hoogenhoff's current situation, sales and UK market experience, analysis of their current sales, their imports, their qualities, their main markets and current sales channels in the UK are important to describe Hoogenhoff's internal structure. Secondly the current situation in the UK market for European Oak has been analyzed and described as well as the competitors in the market to create an overview for the external analysis. After the internal and external analysis, a marketing strategy(s) are implemented to give Hoogenhoff an advice about how to gain more market share on the UK timber market for European Oak timber.

#### **Field Research**

For the research it is important to gather as much information as possible from Hoogenhoff's employees. At the start, at the internal analysis expert talks have been carried out by applying expert talks with Hoogenhoff's employees. The expert talks have been held with Peter van den Hoogenhoff (purchase manager), Bas van den Hoogenhoff (Purchase/Sales Manager), Tom van den Hoogenhoff (Sales Manager) and other employees.

To ensure the needed information for the internal analysis comes from a reliable source, every company aspect will be carefully selected. Furthermore, new trends and developments have been analyzed. Visiting exhibitions, if interesting, relevant and within the timeframe, were also part of the field research. A conference about the production, consumption and market dynamics of European Oak in London on April 18<sup>th</sup> has been visited as field research for the report. European Oak producers from Poland, Ukraine, Croatia and France have discussed the market dynamics of the UK European Oak market. Also importers from the UK spoke about their view of the UK European Oak market dynamics.

The main topic of the conference was about the supply of European Oak timber to the UK market and to what extent traders can deliver constant quality and meet the demand of the market. This conference can provide information about the total volume and the qualities of European Oak sold to the UK market from Poland, Ukraine, Croatia and France and exposes competitors of Hoogenhoff. This information is compared with the information found during desk research to make sure all the information obtained is trustworthy. The methods of obtaining information during field research, and why the information is needed are described in chapter 2.2 Data collection.

## 2.2 Data collection

The data for the internal analysis and the UK market as well as the marketing strategies are described step by step in following order. In appendix 1 a table is presented with the timeframe.

**Step 1** - Collect data from Houtimport v.d. Hoogenhoff database and staff members realized by asking questions regarding the current sales, current marketing strategy, their current marketing position and what they want to achieve as the end result. This to make a proper internal analysis of the company which is of great help researching the English markets. This information is obtained by expert talks with Hoogenhoff's direction and personnel. The information is needed to make an internal analysis and to determine which Strengths and Weaknesses Hoogenhoff faces on the UK market for European Oak. Also this internal analysis has helped to identify which marketing strategies Hoogenhoff could use according to their philosophy. Besides all this it is important to know on which market(s) Hoogenhoff will focus on. This is either a Mass market (wholesalers/large timber manufacturers) or a Niche market (Furniture manufacturers for luxury products). This depends on goals and the volume Hoogenhoff expects to sell on the UK market(s).

**Step 2** - Receive information from Hoogenhoff and search for literature on the internet regarding the English hardwood timber market. Create a clear overview of the markets, timber species used, use of oak timber, quality specifications, timber sizes, sales of oak timber in previous years, the use of their own resource etc. The information received by this process answered most of the sub questions stated above in chapter 1.3. This information is needed to receive an overview about the UK hardwood market, its dynamics and the potential for Hoogenhoff to gain more market share on the UK hardwood market with their quality European Oak timber.



**Step 3** - Search for competitors, according to Hoogenhoff's data and the internet, within the market in the UK. Competitors who fulfil the same needs of the customer and competitors who are active trading similar products. As variables, all importers, traders and manufacturers of Oak timber In the UK are potential customers. Competitors are located in the EU and America exporting timber to the UK. These competitors are specified as exporters of European and American hardwoods, distributors of rough sawn kiln dried oak timber and timber drying facilities specialized in drying hardwoods. These competitors can be found during desk research and from Hoogenhoff's experiences and database and during the visit to the European Oak conference. This information also comes in handy making the SWOT analysis looking at the threats. Competitors information can be quite hard to collect since most of them may not be willing to share 'sensitive' information.

**Step 4** - A list of timber relative businesses and potential customers can be drawn from information of several federations concerning timber trade and manufacturing. The Timber Trade Federation (TTF), British Woodworking Federation (BWF) and Timber Trade Journal (TTJ) are examples of federations where companies (members) active in timber trade and manufacturing are found.

This to receive an overview about the potential customers in the market. These will be companies active in hardwood timber trade and oak timber manufacturing (furniture and flooring). These potential customers will be organised on company occupation and relevance of trade with Hoogenhoff. This will create a smart and quick overview of Hoogenhoff's potential customers in the UK. This information shows the size of the market potential for Hoogenhoff and is very important for the marketing strategies later in the report. This list of potential customers is shown in appendix 10.

**Step 5** - With the results from this potential customer list, which has been drawn up, a questionnaire has been sent to all potential customers to ask them about the current import channels (how they obtain their timber) which qualities they used to use, if it is likely for them to buy timber from foreign timber traders instead of English wholesalers etc. this information helps to identify the needs of the potential customers. 493 surveys were sent with only 37 replies. This equals 7,5% which is not enough for representative data collection. A minimum of 10 percent was needed at least for representative information collection. The outcome of the survey is only used for Hoogenhoff's own database and not been collected in the report.

**Step 6** - After the external market analysis, the current certification schemes, rules and regulations as well as the influences of the Brexit have been analyzed. Especially the influences of the Brexit are important to conduct research about since the UK is leaving the European Union and nowadays is an important trading partner of the Netherlands. To find out which positive and negative aspects the Brexit has for Dutch timber trading companies involved in timber trade with the UK as well as other European Oak exporters to the UK. The information is expected to be of great influence concerning the marketing strategies chosen for this thesis.

**Step 7** - A visit to the Timber Trade Federation in the UK on 18<sup>th</sup> of April due to a conference about the European Oak market in the UK. The conference examined the current market dynamics for the European Oak market in a global perspective, looking at issues affecting oak supply, and whether European producers can continue to meet demand. This market information is from great help to receive a proper view about the European Oak market in the UK which is important for the final thesis. This also gives the report more depth and inside information.

**Step 8** – A Porter 5 forces method is chosen to display the various external factors of the Hardwood timber market in England as well as the external factors for Hoogenhoff in the Netherlands. Some of these factors can be from great influence in decision making later in the process of writing. With the 5 forces model of Porter a clear and short analysis is made about the competitive rivalry, Bargaining power of customers, threat of substitute products, bargaining power of suppliers and the threat of the entry of new competitors. Especially with the Brexit and it's opportunities for other European timber traders, this 5 forces method will be a powerfull tool to examine the external factors.

**Step 9** - A SWOT analysis has being drawn after the internal and external factors of Hoogenhoff and the market are known. This swot analysis displays the strenghts and weaknesses of Hoogenhoff as well as the oppertunities and threats of the English market. These factors is displayd in a table which makes the total overview of the several subjects clear and easy.

**Step 10** - With all the above steps completed, marketing strategies can be implemented. Based on the SWOT analysis, several strategies like adoption and standardization will be analysed by sorting them on criteria based on the purpose of the strategy, achievability of the end result and if the tool will be acceptable (Nashwan Saif, 2015).

The main target audience will be the Importers, Agencies and Merchants in the UK as a whole. This because they are able to purchase large volumes at once and they do have the connections with the manufacturers. This could make it for Hoogenhoff easier to be more active on the market and first gain experience about the demand of European Oak, regarding quality and quantity in the UK before acquisition to manufactures who handel much less volume at once. Notice that the profit margin for business with Merchants, Importers and Agencies is much less than business with the manufacturers.

Hereafter, the 4P's marketingmix can be displayd, described and Hoogenhoff can position itself (Lynn, 2018). What should the **price** of the product be, which type of **products** they want to sell (prime, select or rustic oak qualities), which type of **promotion** to use (online, trade journals, social media), how to distribute (**place**) the products and how to enter the market (Marketing and Promotion, 2016). It is also important to notice the risks of market segmentation. This is a common type of strategy by the hardwood timber industry since hardwood timber comes in different grades (Marketing for Wood Products, 2018).

These grades are marketed towards different market segments. High quality timber usually goes to furniture and luxury flooring products while lower graded timber is used for general flooring and interior and exterior joinery.

The outcome of this marketing strategie will be a guideline for Hoogenhoff how they will be able to gain more market share on the European Oak market in the UK.

With all the above steps an answer can be given on the main research question:

*Is Hoogenhoff able to gain more market share on the English timber market with their dried oak timber and how to accomplish this growth in market share?*

**Step 11** - Whereafter a report is written for Houtimport v.d. Hoogenhoff stating research about the UK market and an advice for Hoogenhoff how to distribute their products with a specific strategy for the market.

**Step 12** - After feed-back has been received the final thesis will be improved and handed in. In Appendix 1, a timeframe has been drawn to show when the steps above should be finished.

### 2.3 Data processing

The internal and external analysis of Houtimport v.d. Hoogenhoff will be displayed in diagrams and tables to create a clear overview about the company, it's market/customers and it's competitors. Results of the English marketoverview are displayed in tables and figures compared to the current figures of Hoogenhoff's sales in their main markets. This to be able to spot similarities and differences. The matrixes are displayed in tables and diagrams.



## 3. Results

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This chapter discusses the results of the research which has been conducted. First the internal analysis is described followed by the external analysis where after the possible consequences/effects of the Brexit on trade are described. After these analysis a conclusion with the answers on the main question and sub-questions is given. The porter 5 forces model is displayed in Chapter 4 and a SWOT analysis has been made to reveal the Strengths and Weaknesses of Hoogenhoff and to show the Opportunities and Threats in the market and is displayed in chapter 5. All information obtained from Hoogenhoff's direction, sales managers and employee's.

### 3.1 Internal analysis

The internal analysis of Houtimport v.d. Hoogenhoff focusses on the current imports, the current sales and their vision for the future as well as their experience with exporting timber to the UK market. All information is gained by expert talks with the managers and employees of Hoogenhoff. Appendix 2 and 3 show a business model and a value proposition of Hoogenhoff.

#### 3.1.1 History

Houtimport v.d. Hoogenhoff started in 1963 with a small sawmill cutting mainly Oak timber, grown in the Netherlands. The sawn timber was used for construction purposes, coffins and furniture. In 1983 the first drying kilns were installed and more and more timber was imported instead of sawn in their own sawmill. This because of the quality of the timber from France and Croatia and there was less work needed, less space needed to run the company as efficient as possible. During the 90's, they expanded the company by adding more dry kilns and build more shelter for storing both dried and green timber. Nowadays, twelve dry kilns are in operation 24/7, they have 2 large sheds to store beams and green timber ready for the dry kilns, a shed with a re-saw to cut the beams into smaller sizes, a shed to de-stick the stacks of dried timber and four warehouses to store the dried timber. All dried timber is sealed in plastic and stocked on thickness, origin (country/sawmill) and length. By doing this the warehoused are very well and efficient organized and timber will be found easily in stock. Thanks to this stock system, Hoogenhoff is able to find the and deliver the right timber fast.

Nowadays They mainly obtain and sell high quality Oak timber from sawmills in France, Ukraine, Poland and Croatia. The Oak timber is bought rough sawn from the sawmill and dried at Hoogenhoff's location in Mill, The Netherlands. First of all the Oak timber is stored to air dry the timber before it will be dried in a dry kiln. The drying process takes up 6-8 weeks for 27mm timber and close to a year for 85-105mm timber. After the drying process the timber is de-stacked and stored ready for shipment to the customer. Besides Oak timber they also store the timber species: American Walnut, American Ash and Tulip wood. These timber species can be sold to the furniture and flooring industry in combination with the Oak timber. All timber is sold rough sawn. Machining takes place at customers company sites. The main market for Hoogenhoff is the furniture and flooring market in the Netherlands (90%). They also have customers in Belgium (5%) and a small percentage in England (3%) and Denmark(2%).

Besides furniture manufacturers they also sell a certain amount of their Oak timber to contractors and private customers (small contractors). These sales are mainly for beams and constructional work.

#### vision for future

Hoogenhoff aims to grow their sales in a slow but steady pace. This to prevent any unforeseen issues. The current volume sold is just enough for the Dutch market. A growth means company expansion. The last 10 years Hoogenhoff has benefitted from the bankruptcy of competitors in the Netherlands during the economic crisis. In this period they were able to grow fast and sell more volume to the Dutch market. They accomplished this, due to more imports of Oak timber and to claim customers according to the philosophy of large stock, fast delivery. Now as one of the Leading importers and retailers of European Oak in the Dutch market, they have to be careful that they don't lose their Dutch customers by increasing the exports of their timber products. However, It is always good to spread the risk and be active on more than one market. The aim is to sell about 500m<sup>3</sup> on the UK hardwood market within 2 years. After gaining experience into the market this could be expanded to a 1000m<sup>3</sup> annually in 5 years. Besides this, they aim to sell their QF1a quality to the UK as this quality gains the most profit.

#### 3.1.2 Hoogenhoff's current sales and customers

Annually Hoogenhoff sells about 5.000 - 5.500m<sup>3</sup> of sawn European Oak timber. Most of this timber is dried at their location in Mill, the Netherlands. At the moment, Rustic quality is very popular and is sold most. Hoogenhoff sells Rustic timber as QF2/3 quality. This quality may contain a certain percentage of small sound and healthy knots not bigger than 35mm. Appendix 4 displays an overview about the qualities of European Oak set by the EOS and French timber (French Timber, 2017). Although Rustic is popular at the moment, Hoogenhoff expects a higher demand of defect free clear timber within the coming 5 years. In their opinion and based on the experience of previous years, the fluctuations in the market and the trends are subject to change fast. The most popular thicknesses of European Oak timber sold in the Dutch market are 27mm and 52mm. These thicknesses are mainly used for furniture purposes. Staircases, table tops, kitchens, flooring, closets etc. are mostly made with these thicknesses. Both thicknesses are planed to 18-20mm and 40-42mm respectively, which are common sizes for furniture in the Dutch furniture industry. The aim of Hoogenhoff is to sell all stock timber within a year. They try to sell the old stock first before new, dried stock will be sold. Doing this keeps the stock timber "young" and fresh. Although this can vary for some thicknesses due to demand of the market. The stock of Hoogenhoff is monitored by an electronical program. The imported timber is registered as green stock in the program before drying. At the moment of drying, the timber is checked out of green stock and registered as drying. After the timber is dried and sticks have been removed, it is checked out of drying and registered as dried stock ready for shipment. The system is organized annually. This means that each bundle of timber gets registered with a number beginning with the first truck number of the year followed by the number of the year we're in and the number of the pack. This makes it easy tracing old packs which need to be sold before new stock is sold. The timber is registered regarding quality, thickness, length pack size and per producer.

If a customer requests a certain quality with a certain thickness, Hoogenhoff is able to find out which packs fit the customer specifications easily and is able to deliver fast.



### Customers

Hoogenhoff sales are mainly from Business to Business (B2B). According to Hoogenhoff, 95-97% of their sales is B2B and 3-5% is sold to private customers. Contractors, timber merchants and furniture manufactures are the main customers. These customers purchase timber in volumes between 3 and 10 m<sup>3</sup> per order. This heavily depends on the company size of the customer. Normally Hoogenhoff only sells whole packs of timber rather than selecting a few boards out of a pack. This is the main reason why they deliver B2B. Private customers often don't need a whole pack of timber. Less work for Hoogenhoff since they don't have to take the bundles apart to sort out specific boards ordered by the customer. The main quality sold on the Dutch Market is Rustic (QF2/3) at the moment. According to Hoogenhoff, about five years ago the market for QF1a was large and it was the main quality sold. Nowadays the trends in the markets have changed and the end consumer prefers a more rustic look. This is why QF2/3 quality is sold most. Notice that the information gained during the stay and expert talks in the UK, Prime quality dominates the market still. According to Hewins Oak, timber merchant in the South West of England, their main quality sold is Prime (QF1a) with no sap wood and no defects (Cooper, 2018). This timber is used for interior joinery. For the future, Hoogenhoff estimates the QF1a quality will be the market trend again.

Hoogenhoff has a lot of returning customers. This due to the large stock, fast delivery and relationship build up over the years, good service and delivering quality. Nevertheless, in order to keep sales as high as possible, they are always looking for new customers by means of acquisition. Whenever there is time, they are looking to acquire new customers. Hoogenhoff sells mainly square edge, kiln dried Oak timber in several lengths and qualities and beams in several head sizes and lengths up to 9 meter. Besides this they also sell oak boules in several thicknesses and square edge American hardwood species, Walnut, Ash and Yellow Poplar. European Oak is and will remain their core business. Sell green timber (wet) dry it at their warehouse in Mill, The Netherlands and store it ready for shipment. Besides the drying process, no value added and only rough sawn timber.

Customers can request for a certain quality, thickness, length and volume. Hoogenhoff then searches in their stock to check the availability of the request and makes offer for the customer. Before the timber is loaded for transport it has to be paid. Timber will never leave the company site in Mill if payment hasn't be fulfilled. Hoogenhoff aims to keep timber in stock no longer than one year. To sell old stock has priority. Transportation is outsourced to a third party and a certain amount of customers pick up the timber themselves. Therefore, the costs of transportation are low.

### 3.1.3 Current imports

At an annual basis, Hoogenhoff purchases about 6000m<sup>3</sup> of timber. This mainly consists of European Oak timber (square edge, beams and boules) and a small percentage American species like Walnut, Ash and Yellow Poplar. The main countries for purchasing the Oak timber are France, Croatia, Poland and the Ukraine. A small percentage is purchased, already kiln dried, in Germany.

The Oak timber is being purchased by availability at the sawmill. There are no contracts for long term delivery. This due to the high pressure on the market demand and the lower availability of logs. Different qualities and thicknesses are purchased in all countries but Croatia remains the best market for clear (QF1a) timber. Beams are mainly imported from France. QF2/3 quality is imported from all countries (France, Croatia, Poland, Ukraine and Germany). Since a while, they also import panel products made from high quality Croatian Oak. These are made of glued strips of 40 x 40mm with a total width of 900mm and a maximum length of 6 meters. The strips will be finger-jointed lengthwise and then glued together to create a very dimensional stable panel.

The average delivery time of green timber after purchase is about a week, but this strongly depends on the availability of logs and the number of invoices by the sawmill. With a shortage of logs or a high demand for a certain quality in a certain thickness at the sawmills this can add up to 3-4 weeks. Because there are almost no contracts for long term delivery, timber is bought depending on the demand of the market and the availability at the sawmills. This due to the high fluctuations in the market. The quality at each sawmill should be the same as they have to meet the standards of the EOS (European Organization for Sawmills). They set out the grading rules which every European sawmill has to meet. Therefore, in prime (QF1a) quality there should be little to no difference in quality. With Rustic (QF2/3) grade, there can be some variation in quality. Some sawmills allow some larger knots or allow more sap. The largest difference in supplying sawmills is the timber handling. How they stack the packs of timber with sticks (sticks not evenly placed, sticks not all the same thickness etc.), the use of proper materials (some use green/wet sticks, some use dried sticks fir/larch, spruce, oak/beach) and the overall look/straightness of packs can differ from sawmill to sawmill.



Hoogenhoff is FSC and PEFC certified and is able to deliver 100% certified timber. However, the demand in the market for certified Oak timber in the Netherlands is low according to Hoogenhoff. In their main market, the Dutch market, there is little interest in certified oak timber and only governmental projects have to be completed with certified timber. Hoogenhoff states that: “In most European countries re-planting of trees and forested areas without certification is well organized, so certification plays only a small- or no role” (Hoogenhoff T. v., 2018). Hoogenhoff tries to purchase as much certified products as possible, but because the demand for certified products is low and the availability for certified oak timber is low, they also buy non-certified oak timber. Percentage wise they purchase about 50% certified and 50% non-certified at the moment.

For Hoogenhoff, buying quality Oak timber becomes more and more of a challenge (Hoogenhoff B. v., 2018). Sawmills only saw what is most convenient for them and importers have to buy standard products. Hoogenhoff on the other hand also often tries to buy non-standardized products to have large variety in stock and to aim to deliver these products at a time when there is a shortage and the demand is high.

#### 3.1.4 Current situation in the UK

Hoogenhoff has a very small share in the UK hardwood market. About ten years ago, at the time of the economic crisis they started to seek new markets with the UK among others. They have had some contacts with agencies and timber merchants. They also advertised a while in the TTJ (Timber Trade journals). During the economic crisis in 2008-2010 some competitors in the Dutch went bankrupt, while Hoogenhoff started to increase their stock volume with a result they could supply the customers of their competitors. Thanks to this, the main focus was on the Dutch market. Hoogenhoff gained a lot of marketshare and grew to one of the largest oak importers and distributors in the Netherlands. Nowadays, for expansion of the company they seek new markets to distribute their products to. This is why the UK came in the picture again.

Hoogenhoff sees the UK market as a potential and very interesting market, since they are the main import market in Europe concerning timber products. Traditional products like oak in favor. Timber Framed Building with Oak is a very large market in the UK according to Hoogenhoff. Besides this Oak most important timber species for furniture, joinery and flooring.

Their aim is to sell a volume of about 500m<sup>3</sup> within 2 years. This is to less to be fully active on this market, but as a side market, besides the Netherlands as main market, this will be a good start into the market. Hoogenhoff expects to grow slowly into the UK market and to grow to a volume of about 1000m<sup>3</sup>. This helps them to establish a slow but steady growth with the Dutch market still as main market. They see the market as a whole as an opportunity. First they have to gain market share and a good reputation before separating to several niche markets. The profits in the beginning can be very low, but with gained knowledge and market share they can target niche markets which will give them more revenue.

From Hoogenhoff's own experience confirmed by Graham Cooper from Hewins Oak, Italian and French sawmills and timber merchants from these countries are the main suppliers of European Oak timber to the UK. France sawmills supply large volumes of Oak beams and boules while Italian companies supply a large amount of square edge timber. Italian merchants and sawmills often obtain their timber from Croatia. Either from a sawmill, or an own owned sawmill in Croatia (Cooper, 2018). The Italian companies sell the prime (QF1a) quality timber as  $\frac{3}{4}$  sides defect free. This means, that on one of the four sides there may be a certain percentage of defects like sapwood or small knots.

The prime timber imported and sold at Hoogenhoff is 4/4 sides clear with no sapwood and no other defects. Hoogenhoff believe they can sell their timber to the UK as there is a large market for clear Prime timber. To ship high volume at same time to avoid shipping costs. Hard to get real clean timber out of log.

### 3.1.5 Competition

Houtimport v.d. Hoogenhoff faces most competition in the Dutch market from Dutch timber traders trading European Oak timber. Most of their main competitors have a large variety of timber species while Hoogenhoff focuses and specializes themselves in the trade in European Oak. This is also their strength. They import the timber at the source dry it in their own drying facilities. Other strength facing competition is the over 25 years of experience concerning the drying process of Oak timber. This tends to be a very complicated process, not to crack the timber inside, prevent collapse, bow, warp, twist etc. However, most of their competitors on the Dutch market are able to machine the Oak timber. This gives the competitors the advantage of a new market segment: Private customers sector since they are able to obtain planed timber instead of rough sawn timber. Besides Dutch competitors, they have to face competition from Belgium and Germany to. Some large exporters in Belgium and Germany are also active on the Dutch market since they are located close to the Border.

Hoogenhoff is already familiar with trade on the UK market. Main competitors on this market are exporters situated in France, Italy and Germany. France has easy access to the UK due to the Calais tunnel to the UK. France exports most beams and boules. German exports consist of beams and square edge timber for furniture and joinery. Italian exports are mainly square edge timber in several qualities used for furniture and joinery purposes. Furthermore Polish exports consist of Oak timber for flooring. This timber is sawn in 20 and 27mm thickness. Florian and Cora are two large Italian exporters of European Oak to the UK. They both own sawmills in Croatia and import timber from Poland and the Ukraine to export it in their turn to the UK.

## 3.2 External analysis

This chapter discusses the UK market for Oak timber. The UK is one of the largest consumers of Oak timber for furniture, joinery and timber framed building purposes. The market demand, the supply from Europe and the US, the qualities sold and other market dynamics are shown in this external analysis. The results of this external analysis are used to find the opportunities and threats in the market.

Most data found during research represents data from 2016 and earlier. This data was released by the government and organizing bodies in September 2017. Data of 2017 is expected to be released at September 2018. All statistics and market trends are based on the year 2016 and earlier. Although, during a visit to the European Oak conference in London, data and figures of 2017 were obtained as well as data from the first quart of 2018.

### 3.2.1 Current situation, Market dynamics

Of all hardwoods imported by the UK, 75 percent are Temperate hardwood species like Oak, Beech, Aspen and ash. The other 25 percent accounts for Tropical hardwoods (figure 1). Of these 75 percent temperate hardwoods, 59 percent is originated from European countries and 41 percent from non-European countries (figure 2). Of all Temperate hardwoods, Oak is most imported accounting for 36,72 percent.

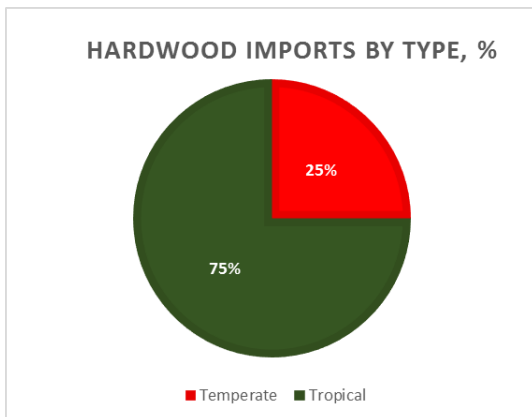


Figure1: Hardwood imports by the UK

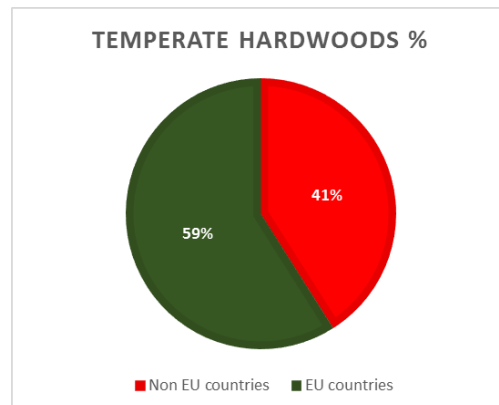


Figure 2: percentage temperate imports

As the world's third largest timber importer, the UK has traditionally played a significant role in the formulation of timber trade policies and been at the forefront in their implementation (Glynn, 2016).

There is a very strong demand from Asian countries, especially China, for oak logs and sawn timber, which has resulted in bans for log exports in Croatia and Ukraine. As a consequence, a shortage of logs and raw material and put pressure on the price of sawn timber in European countries.

Total hardwood imports in percentage imported from the EU, the US, the Tropical region and other regions is displayed in appendix 6.

Both China's and Vietnam's imports of European Oak timber have increased with 450% percent over 13 years from 2004 to 2016 (Oliver, 2017). Asian countries, and especially China and Vietnam, remain very attractive for producing products which are again shipped and sold on the European markets afterwards due to low production costs. These Asian imports affect the whole European Oak industry in Europe and the UK, since less timber is available and pressure due to high demand increases prices (Figure 3).

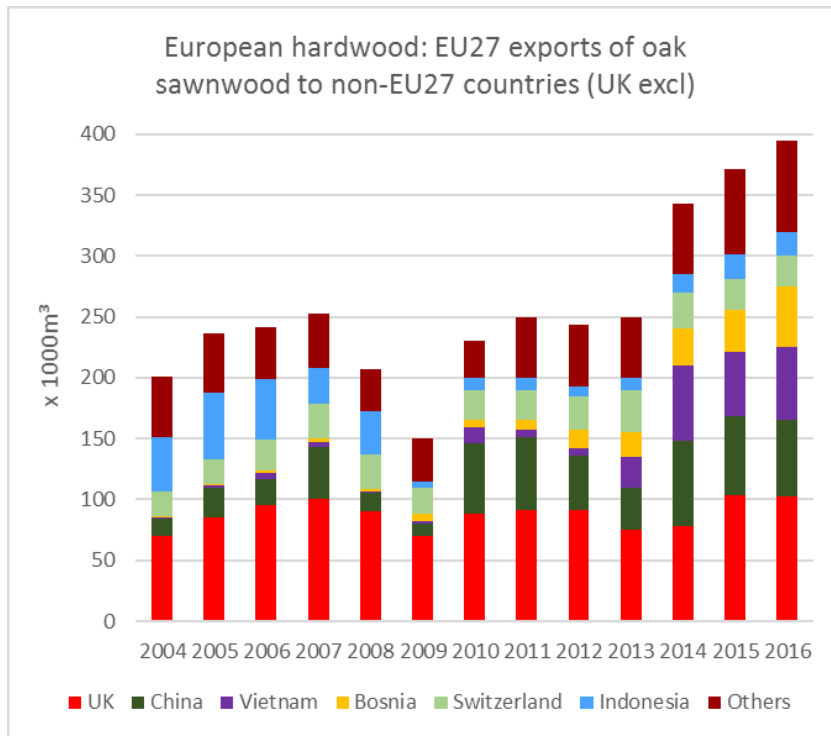


Figure 3: Exports of European Oak timber from EU Member states (excl. UK) (Oliver, 2017)

The demand for European Oak timber in the UK is at about the same level as it was before the economic crises started in 2008. Both 2007 and 2016 show a demand of about 100.000m³ of sawn European Oak timber (figure 3).

There has been little change in European hardwood fashion trends which remain heavily oriented towards the “*oak look*”. For example, oak is now used in over 70% of wood flooring manufactured in the UK while the share of tropical woods continues to decline and other temperate species account for only a small share (GWMI, 2016).

The strong fashion for Oak, combined with the slow recovery of consuming sectors and the relative weakness of the Euro against the dollar, put pressure on supply and increased prices for European Oak in 2016 and 2017 (UNECE/FAO, 2018).

### 3.2.2 Demand of the market

Hardwoods only represent 4.8% of UK timber product consumption in 2015. The majority of sawn hardwood consumed in the UK is imported, accounting for over 90% of all hardwood consumed. Of the total timber imports to the UK, 36.72% (figure 4) consists of Oak timber. American White and Red Oak and European Oak. This 36.72% of 427.000m<sup>3</sup> (Forestry Commission, 2017), the total amount of imported hardwoods to the UK according Andy Duffin, James Latham Timber company (Duffin, 2017), represents roughly 160.000m<sup>3</sup> of Oak timber. According to Mike Snow, Executive director of the American Hardwood Export Council, “of this total, roughly 58.000m<sup>3</sup> is American White and Red oak and the rest is European Oak” (Snow, 2017).

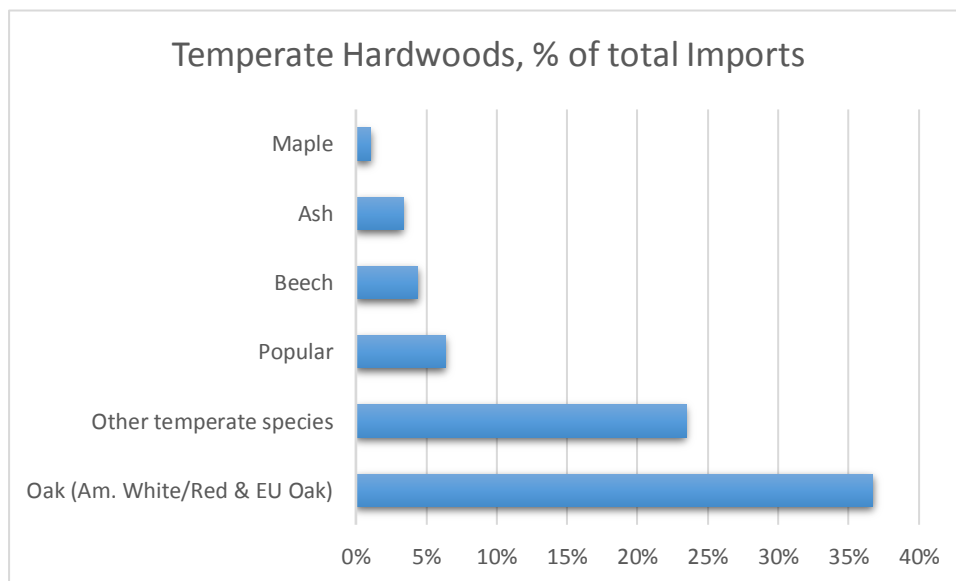


Figure 4: percentage of the temperate hardwood imports by species, (Oliver, 2017)

According to David Hopkins, Director of TTF, these percentages show that ‘Oak timber is by far the most popular Hardwood Timber species in the UK’ (Hopkins, European Oak Conference, 2018).

Statistics of a presentation of Rupert Oliver during a Hardwood conference in London 2017, shows a decreasing demand of hardwood species since 2007. From 2007 – 2009m, due to the economic recession, imports decreased with 150.000m<sup>3</sup> from 500.000 – 350.000m<sup>3</sup> (Oliver, 2017). According to the numbers, the imported volume has stabilized and fluctuates between 350.000 and 400.000 m<sup>3</sup> of hardwoods annually. This is also confirmed by a report from ITTO. According to a report from ITTO, the total UK imports of sawn hardwoods, both tropical and temperate, have been consistent at between 170.000 and 180.000 m<sup>3</sup> each per year since 2014 (ITTO, 2017).

At the start of 2018, during the first three months, the demand for European Oak timber is very high while the supply of logs is under severe pressure due to limited harvesting (Melegari, 2018). This results in a low demand of raw material and a high demand for sawn products with a high price of the sawn products.

Hoogenhoff also notices the high demand and scarce availability of quality EU Oak timber (Hoogenhoff B. v., 2018). Furthermore the demand for both logs and sawn timber in China keeps increasing. Several countries (Croatia and Ukraine) have banned log exports to process the timber in the domestic market to stimulate the Economy. In the last 3 months prices have risen up to 15% for sawn EU Oak (Melegari, 2018).

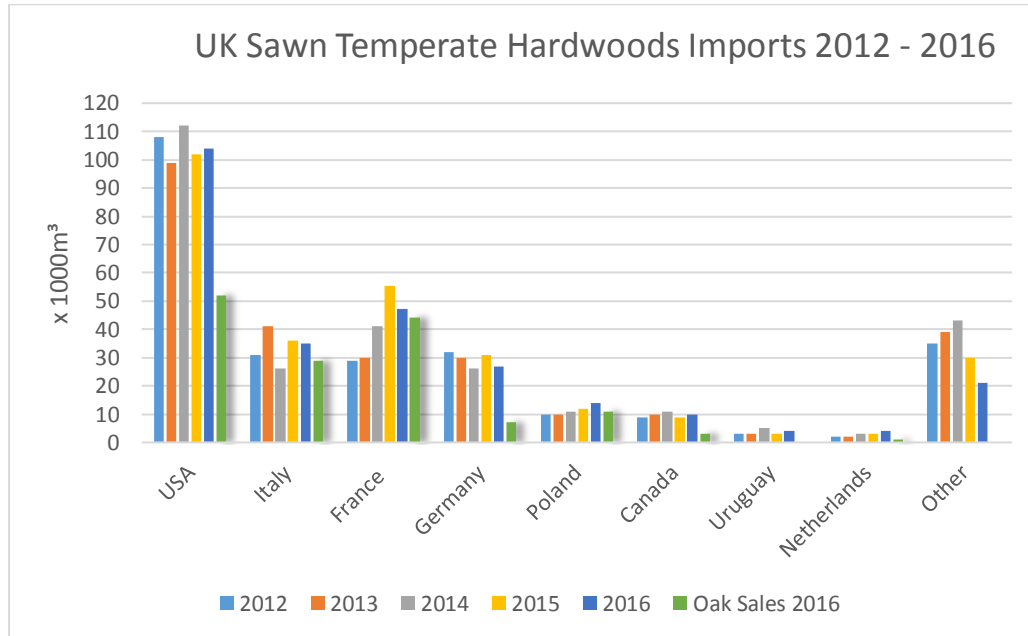


Figure 5: UK % of imports per country and species.. Source: (Oliver, 2017)

#### European timber exports to the UK

Imports of European hardwood timber species account for roughly 102.000m³ in 2016 (figure 5). This makes Europe the most important market for the UK in terms of importing timber. Estonia, Italy and France are the main countries exporting hardwoods to the UK (Oliver, 2017).

According to a timber market report of (ITTO, 2017), imports from Estonia to the UK account for 20% (figure 6), but Estonia is not traditionally known as a supplier of higher grade hardwood, and much UK Imports from the Baltic State comprises lower grade boreal species such as Aspen and Alder for pallets and industrial applications. However, Estonia is now heavily engaged in thermal modification of imported hardwoods such as Ash from other parts of Europe and North America. This to supply a product which competed directly with tropical hardwood external applications like decking, cladding and window frames. For these reasons Estonia and other Baltic States are excluded from calculations regarding UK imports of European Oak timber.

Slower UK imports of hardwoods from Italy are primarily due to Croatia's ban on exports of Oak logs and timber over 25% moisture content (Kunstek, 2018). Italian companies were heavily engaged in the Croatian Oak trade, purchasing logs and lumber for further processing in Italy for shipment to the UK and the rest of Europe. However, in June 2017, the government implemented the two-year ban on unprocessed oak exports, apparently to stop the spread of Oak lace Beetle (ITTO, 2017).

Although some traders suspect a tactic to underpin greater investment in wood processing in Croatia. Italian businesses are setting up mills in Croatia to secure log supply, but lack of kilning capacity is still causing bottlenecks. European Oak prices have risen accordingly, with another 10% increase anticipated for the new cutting season (Bahier, 2018).

France is Europe's main exporter of European Oak timber to the UK market (figure 6). With a volume over 40.000m<sup>3</sup> (Bahier, 2018). Appendix 5 shows the percentage of timber by species and country sold to the UK market. For France, Oak timber represents 94% of their exports. Followed by Italy and Poland. Both export respectively 83% and 79% Oak timber to the UK, appendix 5, (Oliver, 2017). A total overview of French exports of Oak timber can be found at Appendix 7.

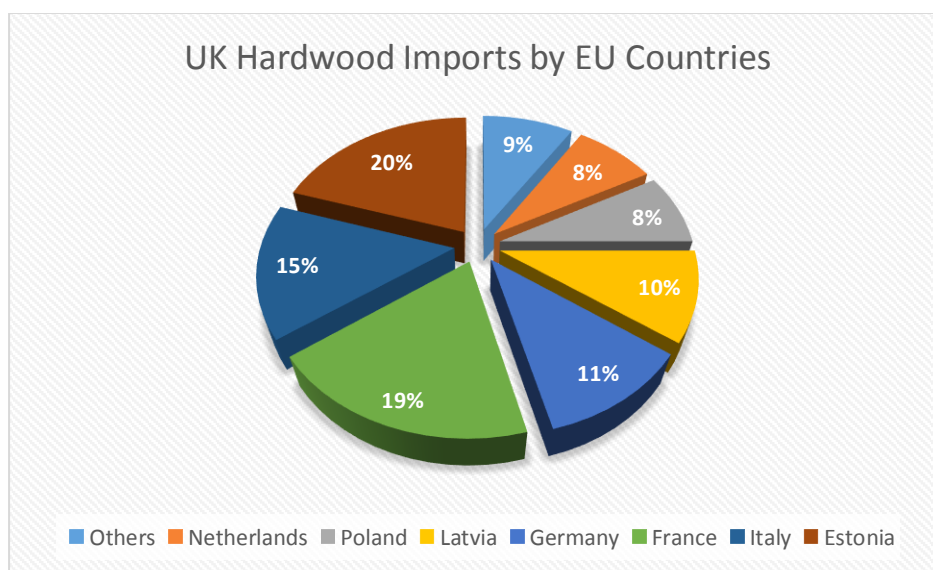


Figure 6: UK Hardwood Imports by EU Countries 2016 (Forestry Commission, 2017)

Croatian hardwood sawmills produce high quality Oak square edge timber. According to Martin Kunstek, executive director of Slavonian Hrast, the quality of the Oak timber in the Slavonian region in Croatia can be compared with the quality of Oak timber grown in the Spessart region in Germany (Kunstek, 2018). This high quality timber is obtained by letting trees grow until 120-140 years of age. Martin also states that: "Almost all imports of Slavonian Oak to the UK finds its way thru Italy" (Kunstek, 2018). This means that Italian importers and sawmills purchase the most of timber in Croatia and sell it to the hardwood market in the UK.

### US timber exports to the UK and EU

American hardwoods account for 24% of the total imports of hardwoods in the UK. The total hardwood timber exports of the US to the EU in 2017 accounts for 358,802m<sup>3</sup> with the UK as leading market importing a volume of 103.823m<sup>3</sup> in 2017. Although the imports of White Oak decreased with 4%, they still represent 50% of all hardwood imports from the US to the UK. Tulipwood increased with 9% to a volume of 25.570m<sup>3</sup> and so did walnut with 9% to a volume of 7.000m<sup>3</sup>. The volume of Ash timber can be compared with Walnut but is steadily decreasing since 2014 and has decreased 24% compared with 2016. Red Oak timber increased with 34% to a volume of 4.828m<sup>3</sup>. Maple and cherry recording very low volumes.

Noticeable is that White Oak on the Italian market increased significantly by 29% to 12.000m<sup>3</sup>, while Tulipwood leads the Italian imports by 63.880m<sup>3</sup>. The increase in importing White Oak timber in 2017 is due to the rising costs and pressure on the availability of European Oak. According to Hoogenhoff, the start of 2018 shows the same in terms of high demand, higher costs and low availability (Hoogenhoff B. v., 2018). The competition is strong within the European market.

Table 1: Exports of US sawn hardwood to UK by main timber type 2015 x1000m<sup>3</sup>

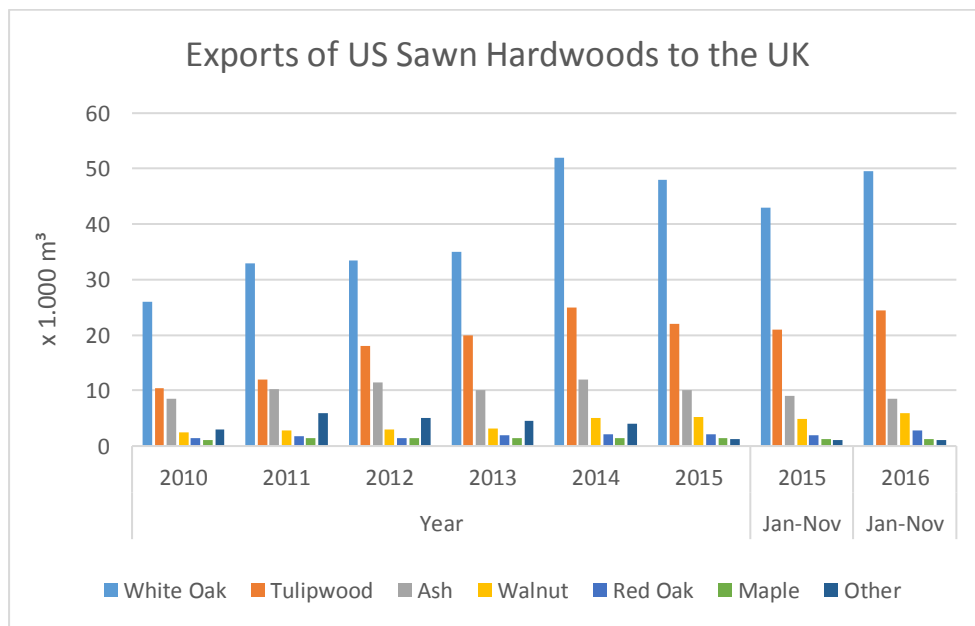


Figure 7: Exports of US sawn Hardwoods to the UK by main timber type 2015, (Snow, 2017)

Imports of American White and Red Oak together account for 50 percent of the US exports to the UK hardwood market. These 50 percent account for a total volume of 58.000m<sup>3</sup> (figure 7) in 2016 (Oliver, 2017). American white Oak is a very good substitute for European Oak. Especially with the price increasing during 2017 and the first quart of 2018. Its machinability, color and durability provide a high market share of white Oak in the UK hardwood market.



### 3.2.3 Pricing and quality standards

Finding results regarding prices of European Oak timber during research is quite hard. Companies only reveal prices when quotations are made. Nevertheless, there were companies who revealed their sales prices. Not all prices are within the sales range of Hoogenhoff. This is due to the fact it includes web shops and that most sales prices are aimed to private consumers. They purchase smaller amounts which are more expensive. The prices below are retrieved from a company who sells B2B. Hoogenhoff acknowledges these prices as representative for the market report.

#### Pricing

Prices obtained from a timber Merchant stock list and calculated by the Author. These prices represent timber sold B2B on the UK market. These are representative in comparison with Hoogenhoff's prices in the B2B market. According to Hoogenhoff, prices are almost the same (Hoogenhoff T. v., 2018). But with these prices it will be hard to sell the same timber on the UK market since it depends on transport costs and custom handling costs.

At the website of Timber Connection, a PDF file with their current European Oak timber stock list is displayed (Timber Connection, 2018). This list includes all packs in stock measured in m<sup>3</sup>. Furthermore the price is shown in £/ft<sup>3</sup>. With the right calculations the prices in €/m<sup>3</sup> could be calculated. See appendix 10 for a calculation of the prices per quality.

#### Prime (QF1a) Timber Prices

This oak timber is kiln dried, 100% FSC and sold rough sawn from an Importer/Merchant to other Merchants and furniture and joinery manufacturers. All the prices calculated are for Prime (QF1a) UK standards quality. Slightly less quality than Hoogenhoff aims to sell most to the UK market. The Prices are calculated according to a stock list of January 2018 from Timber Connection, an Agency/importer based North of London (Timber Connection, 2018) and are subject to change every month. Prices in five different, but most popular sizes for the same quality are calculated and displayed below.

- 27mm x 2,5m = €1497,- /m<sup>3</sup>
- 50mm x 3m = €2057,-/m<sup>3</sup>
- 65mm x 3m = €2261,-/m<sup>3</sup>
- 80mm x 3,2m = €2422,-/m<sup>3</sup>
- 100mm x 3,2m = €3293,-/m<sup>3</sup>

According to the website of Timber Connection, all European Oak timber is obtained from Sawmills and Exporters in mainly Croatia and in Germany.

Lengths as similar as possible to have less price differences per m<sup>3</sup>. Prices can vary for sizes which are in high demand in the UK market like 3 meter. Due to this, various thicknesses closest to 3m in length are chosen which were available on the Stock list.

### Rustic (QF2/3) Timber Prices

The European Oak timber is Kiln Dried and 100% FSC. It is stocked and will be sold rough sawn to an importer and local timber traders as well as timber manufacturers (Timber Connection, 2018). All prices calculated are for Rustic (QF2/3) UK standards quality. This is not the quality Hoogenhoff aims to sell on the UK market but it will give a clear overview and comparison with Hoogenhoff's prices for QF2/3 quality.

Prices in four different, but most popular sizes for the same quality are calculated and displayed below.

- 27mm x 3.05m = €967,57,-/m<sup>3</sup>
- 32mm x 3.00m = €927,20,-/m<sup>3</sup>
- 50mm x 2.90m = €1.007,90,-/m<sup>3</sup>
- 80mm x 2.90m = €1.250,26,-/m<sup>3</sup>

Notice the difference in price for 27mm and 32mm. It is likely that there is more demand for 27mm as this thickness is mainly used for solid Hardwood flooring. Rustic Oak flooring is very popular in the UK. (Timber Connection, 2018)

### Quality standards

In Europe qualities of square edged Oak timber are marked as QF. The number after represents the type of quality ranked from high quality to low quality. 1 means high quality and 4 means low quality. Besides this it is common in Europe to add an extra vowel to define the quality even more. QF1a means 4 sides clear timber, while QF1b may contain a very small knot on one of the four sides. See appendix 4 for an overview of the different quality standards set by the EOS and French Timber (French Timber, 2017).

The UK has their own quality standards. They use:

Select/super prime, quarter sawn Oak timber, small market in the UK, expensive timber less demand according to Hewins Oak (Cooper, 2018). The main qualities sold are:

- Prime (QF1a), 3/4 sides clear, 1 side may contain a small amount of sap and small knot(s). Main quality in the UK. Used for furniture manufacturing, staircases, joinery and flooring.
- Joinery (QF1b), 3/4 sides clear, one side may contain a certain percentage of sap and knots more compared with QF1a quality.
- Rustic (QF2/3), 2<sup>nd</sup> largest market in the UK. The main type of use is flooring according to a large amount of flooring retailers.

Besides European oak, the UK imports a fair amount of American White (95%) and Red Oak (5%) (Snow, 2017). These qualities have more or less the same grade although the quality is slightly less due to a more open grain structure, the timber tends to shrink more in a different way (UNECE/FAO, 2018). The three main qualities sold from the US to the UK are Super Prime, Prime and Rustic (UK named grades). The Rustic quality has the same characteristics as European Rustic grade Oak. However, US prime quality oak, graded according to the NHLA grading rules, has to be 83% free of defects on 2 surfaces, while super prime has to be 83% clear on all 4 surfaces (NHLA, 2016). This differentiates the qualities of US Oak from European Oak.

### Use of Oak timber in the UK

Oak timber has been used for centuries in the United Kingdom. Think of timber framed buildings, flooring, furniture and interior- and exterior joinery. Oak timber products can be divided in several categories. Beams (structural), Square Edge timber and Boules.

Oak Beams are used for structural purposes (oak framed building). In the UK this is a large market according to the number of companies found active in the oak framed building industry, and the expert talks during the European Oak Conference. The main reason for building with Oak is the Heritage of the material. Besides this, Oak is very durable and the grey color over time is much appreciated by the consumers.

Square edged timber is mainly used for furniture manufacturing (tables and kitchen tops), interior joinery (window and door frames), staircases and flooring. Prime grade oak timber is mainly used in the furniture sector and staircase manufacturers. Graham Cooper, Purchase manager at Hewins Oak states: "Staircase manufactures use the most amount of prime Oak timber in terms of percentage per volume used" (Cooper, 2018). Joinery grade timber is used for, as the name says, interior and exterior joinery. Both prime grade and rustic grade are used for flooring, where the rustic grade has the highest market share. Rustic type of flooring is very popular in the UK according to a survey of the TTF (Hopkins, European Oak Conference, 2018). Table tops are made of all qualities depending on customer needs.

#### 3.2.4 Customers identification

A list of potential customers, trading, merchants, building and manufacturing Oak timber has been drawn from information obtained by TTF, BWF and TTJ. As a variable, all buyers of Oak timber in the UK are potential customers. This includes timber Agencies, Timber Merchants, Timber Framed builders, Furniture manufactures, interior/exterior joiners and flooring specialists. Appendix 10 shows a list with potential customers and their main business occupation. A survey was send to these 439 companies but due to low response (7,5%), the results of the survey would not be representative and for that reason not be mentioned in the report. The information of the survey is only used for Hoogenhoff's database.

### 3.2.5 Competitor overview

To set variables, all Agents, Importers and Timber Merchants in or from the UK are seen as potential customers. All Exporters, Timber Merchants and agents in or from the EU Member states are seen as competitors. This because in the future, with the Brexit, the UK won't be part of the EU member states which makes them independent so each business of the UK will be seen as a potential customer (Hoogenhoff T. v., 2018). Besides this, the American hardwood exporters will be seen as a competitor to, since they sell over 50.000m<sup>3</sup> of their White Oak in the UK. This percentage white oak of the total Oak timber sold in the UK is about 38%. Red Oak accounts for 2 % and the rest is European Oak timber (Snow, 2017).

There is very low competition regarding UK grown oak timber. This due to the intensive imports and use of EU oak (89% of total hardwoods). Only 11% of hardwoods used in UK are from own forest resources (Forestry Commission, 2017). Furniture and joinery manufacturers prefer the use of EU or Am (white) oak timber due to its quality, characteristics and working properties (Cooper, 2018).

Competitors like Florian and Cora (Italy) are two of the main suppliers of European Oak timber to the UK market. Both companies own sawmills in Croatia and Italy and stock and distribute their timber in and from several warehouses in Italy (Florian, 2017).

French timber suppliers to the UK are mainly situated in the east of France. This mainly because of the low transportation costs. Also most of the suppliers to the UK are sawmills. The timber is obtained straight from the source to reduce further handling costs.

German competition faced by companies located in the Spessart area who have access to purchase and produce lots of high quality oak timber and trade this timber on the European and UK market.

The Asian market, mainly China, is seen as a large competitor. Lots of products, produced from European Oak, are shipped to Europe to be sold to the end consumer. Products are produced fairly cheap which results in low product prices on the European markets.

Slavonian Hrast (Slavonian Oak), a new sawmill in Croatia milling Oak timber, was introduced into the UK market by TimberLink International (Timber Agency). This agency distributes Oak timber from Slavonian Hrast thru Timbmet (Kunstek, 2018). Timbmet is an importer/merchant of several different hardwood and softwood species including European Oak. At the conference in London, Slavonian Hrast manager Martin Kunstek said: 'they were the first Croatian company to directly distribute timber to the UK market, due to their new drying facilities'. Most Croatian timber is sold to Italian timber merchants before it is distributed further to the market. Although according to Martin, more and more sawmills are exporting directly to the UK without the help of an agent or European Merchant (Kunstek, 2018).

### 3.2.6 Certification schemes

The members of TTF account for roughly 85% of the total UK market for Imported timber (including logs, sawn wood, decking, mouldings, veneer, plywood and other panels) (GWMI, 2017).

They report a year on year growth in certified products to an unprecedented level of 90.2% of total volumes (GWMI, 2017). This in contradiction with a survey held amongst TTF members. The survey asked for the demand of certified products amongst customers of TTF members. The answers showed that most customers are not interested in FSC or PEFC certification, While most members only sell 100% FSC products (James Latham, 2017). Results of TTF survey amongst member shows in more than 50% no ask for certification while 90% of timber imported certified (Latham, 2017).

The remaining 10% uncertified hardwood timber is originating from North America and Africa, both areas where traditional certification is less Apparent (GWMI, 2017). Within this 10%, TTF members are conducting supply chain, species and country risk assessments as part of the due diligence process required both for the EUTR and the TTF Responsible Purchasing Policy (RPP). Therefore, risk within the supply chain for uncertified timber is adequately managed.

Note that there is a significant and increasing business-to-business demand for certified products in the market. Despite the progress by members, TTF note that “this demand can prove difficulty to meet from traditional source countries and regions and at times can prove harmful to timber being specified as a material” (GWMI, 2017).

The high levels of certified products traded by UK TTF members is partly a reflection of the products and supply countries involved and dominated by primary and secondary wood products and mainly derived from European countries where there is a high proportion of certified products.

### 3.2.8 European Oak conference

Markets for European Oak are facing increased pressure on price and availability. This was the key message delivered at the European Oak conference in London held on the 18<sup>th</sup> of April 2018.

A combination of increased demand and market restrictions have been affecting Oak wood prices over the past few years. Significantly, as highlighted by the EOS Secretary General Silvia Melegari, exports of logs from the EU to China have soared by 181% in the last 10 years. This growing demand is having major impacts on European Oak producers, particularly France.

The availability of European Oak is also affected by log bans in place in supplying countries such as Croatia and Ukraine due to the impact of pests (Croatia) or governmental measures to improve domestic industry (Ukraine). This shortage of raw materials is causing several sawmills to keep production low, preventing the sector from achieving its full potential.

Silvia Melegari stated that “the concerns of the hardwood sawmill sectors have been voiced in several occasions” and that “both the EU Parliament and the European Economic and Social Committee have invited Member States to ensure that wood supply from the region’s forests is sufficient to satisfy, on a sustainable basis, local industries’ needs and society’s needs”.

“For its aesthetic and technical qualities, Oak remains a prime product for UK timber importers and traders,” says TTF managing Director David Hopkins. “However, material shortage and international trade dynamics are likely to drive prices higher in the near future. This may open the market for alternative hardwood species.”

The increase in log prices (raw material) shows concerns for France sawmills according to Jean-Bernard Bahier (Bahier, 2018). Appendix ... for the increase in price for raw materials in France. Rafal Gruszczynski, from the Polish Economic Chamber of Wood industry (Gruszczynski, 2018), Vasyl Masyuk, from the Ukrainian Association of Wood processors (Masyuk, 2018), and Martin Kunstek (Kunstek, 2018) from Slavonski Hrast acknowledge these price increases in their countries to.

### 3.3 Influence of Brexit on Trade

This chapter discusses the influences of the Brexit on the Trade with EU member states. Although the UK and EU are still negotiating about possible trade options, a real solution has to be found and signed first. During this discussion, only information possible from governmental reports regarding the Brexit and Trade is used for trustworthy reasons. Furthermore, all information is based on speculations for the UK and EU, possible scenario's regarding the UK leaving the EU and because there is no clear agreement signed by both parties. All Brexit information is gained from governmental (Webb, Brexit: Trade Aspects, 2017) reports as well as BBC statistics (Hunt & Wheeler, 2018) and the TTF (Hopkins, 2018).

#### 3.3.1 What is Brexit

In June 2016, the population of the UK (England, Wales, Scotland and Northern Ireland) have voted for Britain to leave the European Union. With the UK to leave the EU, they have to compliance with article 50 (Hunt & Wheeler, 2018). Article 50 is a plan for any country that wishes to exit the EU to do so. It was created as part of the Treaty of Lisbon, an agreement signed up to by all EU states which became law in 2009. Before article 50 there was no formal agreement for a country to leave the EU. Article 50 spells out that any EU member state may decide to quit the EU, that it must notify the European Council and negotiate its withdrawal with the EU, that there are two years to reach an agreement. Unless everyone agrees to extend it and that the exiting state cannot take part in EU internal discussions about its departure (Hunt & Wheeler, 2018). Prime minister Theresa May triggered the process on March 29<sup>th</sup> 2017. This means they are scheduled to leave the EU on March 29<sup>th</sup> 2019 with a 2 year period to reach agreements with the EU about the trade of goods, services, capital and people (Hunt & Wheeler, 2018).

The date of the start of Brexit, 29<sup>th</sup> May 2019 has been postponed by a transition period to 31<sup>st</sup> December 2020 according to the BBC (Hunt & Wheeler, 2018). This effectively means the Brexit will start at the 1<sup>st</sup> of January 2021. The transition period, the period to get everything into place and allow businesses and others to prepare for the moment when the new post-Brexit rules between the UK and EU begin. It also allows more time for the details of the new relationship to be fully carried out. Free movement will continue during the transition period, as the EU wanted (Hunt & Wheeler, 2018).

A report about the trade aspects of the Brexit state that after the Brexit, the UK will be able to negotiate its own trade deals with other countries. Agreements cannot be concluded while the UK remains in the EU (Webb, Brexit: Trade Aspects, 2017). The Government has said that it is entitled to hold discussions with potential trade partners while the UK remains in the EU. In July 2017, the Government said that 10 trade working groups had been set up covering 15 countries Australia, China, India, Israel, New Zealand, Norway, South Korea, the Gulf Co-operation Council, Turkey and the US (Webb, Brexit: Trade Aspects, 2017).

### 3.3.2 Current situation of the UK in the EU

At the moment, as a member of the EU, the UK is part of the EU single market and the customs union. This means no tariffs or quotas on trade of goods and services between Member States of the EU. It also means elimination of non-tariff barriers, such as differing technical specifications and rules on labelling of products (Webb, Brexit: Trade Aspects, 2017). Given that average tariffs are now low, these non-tariff barriers are considered to be a more important barrier to trade, although tariffs on some individual products are still high. The EU tariff on cars is around 10% and agricultural tariffs are generally higher than those on non-agricultural products (Webb, Brexit: Trade Aspects, 2017).

Dominic Webb of UK Parliament states: “Key feature of the customs union is that all EU Member States set the same tariffs on goods imported into the EU from non-EU countries” (Webb, Brexit: Trade Aspects, 2017). This facilitates trade between Member States by largely removing the need for checks where products come from / are made. However, being part of the customs union makes it very difficult for a country to negotiate its own free trade agreements.

Due to the Brexit, the UK government is seeking an ambitious new economic partnership with the EU. The Government’s Brexit White Paper said it was aiming “for the freest possible trade in goods and services between the UK and the EU.” (Webb, Brexit: Trade Aspects, 2017) The Government’s policy is for the UK to leave the single market and customs union after Brexit. Staying in the single market would mean complying with the EU’s four freedoms (freedom of movement of goods, services, people and capital) and a continuing role for the European Court of Justice. Leaving the customs union would allow the UK to negotiate its own trade deals but would be likely to mean greater customs checks on UK trade with the EU. Further detail on the customs union was provided in a position paper published by the Government in August 2017. The UK Government also published White Papers on customs and trade in October 2017 (Webb, Brexit: Trade Aspects, 2017). Currently the EU is the UK’s largest trading partner, accounting for 44% of UK exports of goods and services in 2016 and 53% of UK’s imports (Webb, Parliament, 2017).

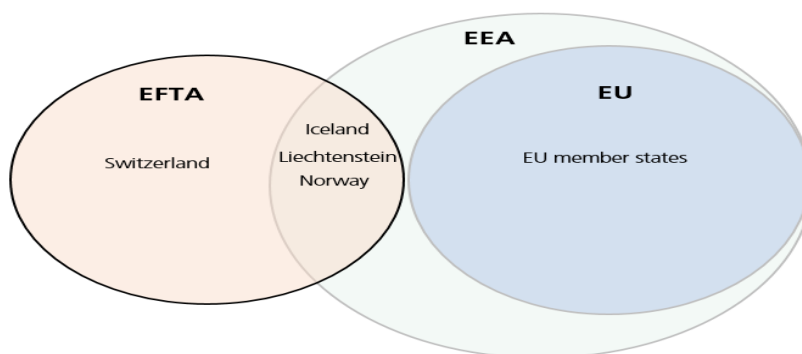


FIGURE 8: CURRENT SITUATION OF THE EU AND ITS SINGLE MARKET. SOURCE: (RHODES, WARD, MILLER, & GOWER, 2018)



The European Free Trade Association (EFTA) is an intergovernmental group of countries that seeks to promote free trade and economic integration between its members. EFTA has four members: Iceland, Norway, Liechtenstein and Switzerland. Iceland, Liechtenstein and Norway are also members of the European Economic Area (EEA), along with all members of the European Union. Switzerland is unique because it is a member of the EFTA but not a member of the EEA. The EFTA was established in 1960 by the Stockholm Convention with seven founding members – Austria, Denmark, Sweden, Switzerland, Portugal, the UK and Norway. Five of these founding countries have left to join the European Union. The EEA agreement extends the EU single market and its ‘four freedoms’, of goods, services, people and capital including Norway, Iceland and Liechtenstein. The Relationship between EEA countries (Liechtenstein, Norway, Iceland and EU member states) is governed by the EEA agreement which came into force in 1994. Switzerland is not in the EEA; its relationship with the EU is governed by a series of bilateral agreements.

### 3.3.3 Possible Brexit Outcomes

In her Florence speech, the Prime Minister said that the UK was not looking to copy an existing model of relations with the EU and ruled out membership of the European Economic Area (EEA) or an agreement based on the EU’s recent trade deal with Canada. (Hunt & Wheeler, 2018) The Prime Minister also called for a “period of implementation” lasting for around two years after Brexit. The Prime Minister argued that the UK and EU should have access to each other’s markets on current terms during this period (Hunt & Wheeler, 2018).

<i>Impact →</i> <b>Trade agreement</b> <i>↓</i>	<i>Tariffs on goods exported to the UK</i>	<i>Tariffs on goods imported from the UK</i>	<i>Border-control and customs procedures</i>	<i>Free movement of services</i>	<i>Free movement of persons</i>	<i>EU free trade agreements with countries outside EU</i>	<i>Likelihood of Brexit results</i>
<b>European Economic Area (EEA)</b>	No (exceptions on some agricultural and fishing products)	No (exceptions on some agricultural and fishing products)	Yes	Yes	Yes	No	Not likely
<b>Customs Union with EU</b>	No (exceptions are possible)	No (exceptions are possible)	Yes	No	No	Yes	Not likely
<b>Bilateral agreement</b>	Probably on selection of goods	Probably on selection of goods	Yes	Dependent on the agreement	Probably not	No	Likely
<b>Hard Brexit</b>	Yes (likely WTO)	Yes (likely WTO)	Yes	No	No	No	Likely

Table 2: Possible Brexit outcomes with consequences. Source: (Rabobank Nederland, 2017)

The two main alternatives to the Government's proposals are trading on World Trade Organization (WTO) rules and membership of the EEA (table 2). The EEA option would be the closest to EU membership while the WTO option would be the most radical break (Rabobank Nederland, 2017). Between these alternatives, a customs union with current EU member states or a bilateral agreement could be in reach. Although negotiations about a customs union with EU member states would provide hard negotiations between the UK and the EU.

The WTO option would apply in the absence of a negotiated deal with the EU (Hunt & Wheeler, 2018). This would involve access to the single market on the least advantageous terms. The UK would still have "access" to the EU market in the same way that any other country without a trade agreement with the EU (such as the US) can export to it. Exports of UK goods to the EU would be subject to the EU's tariffs and the other way around. The EU would not be able to set unfair tariffs on imports from the UK. The WTO option would mean no contribution to the EU budget and no free movement of people (Hunt & Wheeler, 2018).

Another option would be UK membership of the European Economic Area (EEA). The EEA includes all EU Member States plus Iceland, Liechtenstein and Norway (Webb, Brexit: Trade Aspects, 2017). The EEA option involves considerable (but not complete) access to the single market. It also involves the free movement of people and contributions to EU spending. Non-EU EEA countries are outside the EU customs union (Webb, Parliament, 2017). This option will be less likely due to the fact that the UK has to compliance with EU jurisdiction on trade of goods, services, customs and people and the free movement of people, one of the main reasons British inhabitants voted for the Brexit, will still be in effect. Imports from the US could increase, since the UK and the US already trade according to a WTO trade agreement. This trade can continue without consequences while, if chosen for a WTO with the EU, timber imports from EU Member States face increased prices.

Furthermore a customs union with EU member states will provide the freest possible trade with EU member states, without the customs controls and a Free Trade agreement with EU Member States. Free movement of goods and services and free movement of People are not included. This agreement will not add tariffs on goods which will help reduce costs.

A bilateral agreement between the UK and the EU seems to be the most likely choice for both the EU as the UK. The outcome of this agreement strongly depends on the outcome of the negotiations between the UK and the EU. Although it allows no Free Trade Agreement, negotiations about the freest possible trade of certain goods like timber could be reached. This depends on the value of good which are imported and exported by the UK as well as EU member states.

The Brexit will also affect trade with countries outside the EU according to Dominic Webb. At the moment, the UK's trade with these countries is governed by the EU. As a result of EU membership, the UK currently has trade agreements with over 60 countries. While the position is not entirely clear, the balance of evidence suggests that the UK will no longer benefit from these deals after Brexit (Webb, Brexit: Trade Aspects, 2017).

#### Government negotiations with the EU

The Government's negotiating objectives with the EU for the trade aspects of Brexit were initially set out in a speech by the Prime Minister at Lancaster House on 17 January 2017. A White Paper was published shortly afterwards. The Prime Minister also gave a speech on Brexit in Florence on 22 September 2017 (Hunt & Wheeler, 2018).

The main points are:

- The UK will leave the single market and the customs union.
- The UK wants the freest and most frictionless trade possible in goods and services between the UK and the EU.
- The UK does not wish to adopt an existing model of relations with the EU. Both the EEA option and a model based on the EU's recent trade agreement with Canada are rejected.
- An "implementation" period (or transitional period) of around two years.

The Prime Minister said: let us not seek to adopt a model already enjoyed by other countries. Instead let us be creative as well as practical in designing an ambitious economic partnership which respects the freedoms and principles of the EU, and the wishes of the British people (Hunt & Wheeler, 2018).

Prime Minister May is optimistic that a trade agreement could be reached for a number of reasons, including the fact that the UK and EU are important trading partners, the UK and EU have a shared belief in free trade and a commitment to high regulatory standards (Hunt & Wheeler, 2018).

### 3.3.4 UK Brexit effect on Timber Traders

The effects of the Brexit on Timber Traders in the UK can be huge when a WTO agreement is accepted and put into operation. If an EEA agreement is reached, the effects will be kept as minimal as possible.

A survey, held by the Confederation of British Industry (CBI) in compliance with the Timber Trade Federation, showed that 100% of respondents would like to stay in the Customs Union as it exists at the moment (Timber Trade Federation, 2018).

According to the survey, 76% of the timber traders are against Brexit as they expect negative consequences for timber trade Europe. While 49% of all UK hardwood imports are from the EU, Estonia (20%), Italy (15%) and France (19%), EU countries are the main hardwood suppliers to the UK hardwood market. Leaving the customs union would have great effects in a negative perspective (State of the Market, PDF Hopkins, 2017).

The biggest concerns for UK timber traders and operators, in case Britain left the Customs Union, include:

- Having to hold larger volumes of stock to compensate for slower movement of goods;
- Increased customs costs and administration time;
- Up-front VAT implications and potentially tariffs.

In the light of this, the TTF is urging the UK Government to clarify its position towards a list of priorities for the British Timber Trade Industry including:

- VAT harmonization on imports;
- Construction Products Regulation and related product standards;
- European Timber Regulation (EUTR).

Answers to the survey were used by the CBI to shape its recent call on government to get the best deal for The British Industry in the Brexit negotiations (Timber Trade Federation, 2018).

The UK timber industry faces a potential “£1 Billion Pound Brexit Bill” if the UK leaves the EU Customs Union causing considerable problems for SMEs which makes up a majority of the sector. Managing director of the Timber Trade Federation, David Hopkins said: “Once the UK leaves the EU and its VAT area, VAT on EU imports will have to be paid up-front” (GWMI, 2017).

David Hopkins, managing director of TTF, states in an article of the TTF that: “currently, over 60% of all timber products used in the UK are imported from the EU” (Hopkins, 2018). He also states that over the past two years, since the depreciation of the currency as a result of the EU Referendum vot and increased global demand, timber import prices have risen considerably and many of the TTF members have struggled to accommodate these rises of prices in their own business or pass them to customers (Hopkins, 2018).

The Customs Union options threaten to make the situation for the Timber Traders worse. Firstly, VAT payments. Under current European rules, importers can spread the payment of VAT on EU imports, giving time for goods to be sold before having to pay the tax. This eases cash flow amongst the Timber Traders, especially for small businesses.

However, under the terms of the Taxation Bill, currently going through Parliament, once the UK leaves the EU and its VAT area, this may no longer be possible. The current option contained in the Bill means timber importers will be obliged to pay 20 percent VAT upfront, causing huge cost and cash flow problems for timber traders and importers (Hopkins, 2018).

Secondly, the change to UK customs agreements with the EU will mean a slow-down in throughput of goods into the UK. Currently, all timber entering the UK from Europe can clear ports and customs immediately. However, if the UK leaves the Customs Union, goods are subject to customs checks. This will slow down trade, increasing time, bureaucracy and ultimately costs for TTF Members (Hopkins, 2018).

### 3.3.5 Trade relationship UK – Netherlands

8% of goods and services are exported from the Netherlands to the UK. However 11% is being imported from the UK to The Netherlands. This makes the UK a very interesting trading partner for the Netherlands. This is why the Brexit will have a negative influence on the Dutch economic situation, especially when at a certain time trade barriers arise between the UK and EU (Rabobank Nederland, 2017).

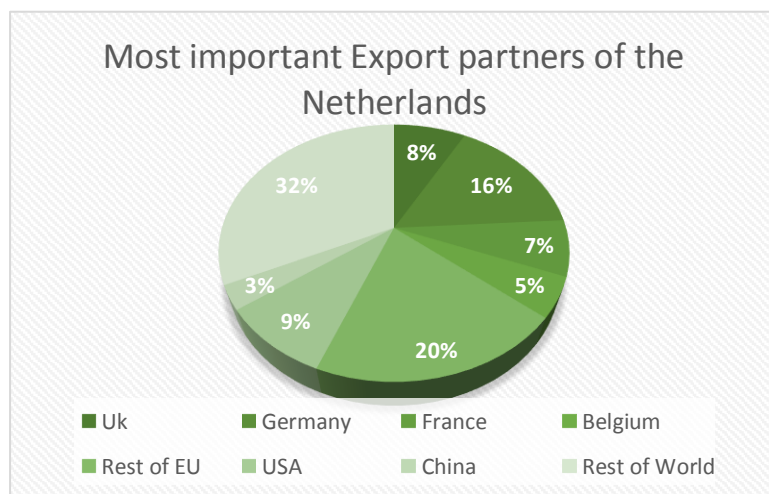


Figure 9: Export partners of the Netherlands in percentage, (Rabobank Nederland, 2017)

### 3.3.6 Conclusion

The outcome of the Brexit, which is unknown at the moment, will decide which effects the Brexit will have on the timber traders in the UK and in the EU. This will all depend on the outcome of the negotiation with the EU Member States. Joining the EEA (soft Brexit) or signing a WTO (hard Brexit) could have positive/negative effects concerning trade of goods. Tariffs on goods and services, more- and stronger custom control and administrative work could lead to higher costs for both importers and exporters. According to David Hopkins from the TTF, when a hard Brexit becomes reality and a WTO is signed, Importers and Agencies could face a one Billion pound Brexit bill for VAT payments on EU imports. These VAT payments could result in low imports of European timber species and the UK more focusing on the American species since they already trade with the US according to a WTO agreement. The chance for the UK to stay in EU single market will be very small. If the EU accepts this, then more countries will follow the UK by leaving the EU while taking advantage of the single market in the EU as it is right now. Due to this, negotiations between the UK and the EU are hard.

If a WTO agreement is reached between the UK and the EU, costs of custom, tariffs and administrative work will come on top of timber prices. This can make timber from the EU to the UK extremely expensive. On the other hand, American White and Red Oak are already imported from the US according to a WTO agreement. There will be no more complications and costs. This could mean more imports of American Oak due to the lower costs.

The UK is leaving the EU to be independent on trade of goods, services and people. According to a report of the Parliament, in 2015, around 55 million customs declarations were made by 141,000 traders. The UK's exit from the EU could see the number of customs declarations which HMRC must process each year increase five-fold to 255 million (Parliament, 2017). A failed customs system could therefore lead to huge disruption for businesses, with delays potentially causing massive queues at Dover and resulting in food being left to rot in trucks at the border (Parliament, 2017).

## 4. Conclusion

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Based on the results of the internal and external analysis, Houtimport v.d. Hoogenhoff is able to distribute their products to the UK hardwood market. By implementing marketing strategies and position their sales as described in chapter 8, Hoogenhoff is able to distribute their dried European Oak timber to the UK market.

This can be acknowledged with the facts that the UK as the third largest importer of hardwoods, the UK hardwood market is a large market with great potential for companies to enter. European Oak is the most imported hardwood species followed by American White and Red Oak into the UK. The demand of these timber species are high due to its properties (looks, workability, durability and its heritage), structural, - joinery- and furniture purposes. Although the demand for European Oak in the UK market is high, there is high competition from EU sawmills and exporters as well as competition with the US exporters of American Red and White Oak. Despite the known quality difference of European and American Oak, American Oak has become very attractive due to the low volumes of raw material concerning European Oak in 2017 and the start of 2018.

Hoogenhoff aims to sell high quality Prime (QF1a) timber to the UK. At the moment large amounts of prime timber from Italy are exported to the UK market which allow a small amount of knot(s) and sapwood on one of the four sides (Hoogenhoff T. v., 2018). This because the grading standards for Italian exporters differ from Hoogenhoff grading standards (Hoogenhoff B. v., 2018). Due to this small variety in quality, there is also a noticeable variety in price for prime timber from Italy and Hoogenhoff. This difference in price could make it difficult for Hoogenhoff to enter the UK market, since this market accepts the quality from Italian exporters as their prime quality, which can be obtained for a lower price.

The competition from home grown UK Oak is low. 11% of all hardwood timber is produced in the UK, while 89% is being imported, mainly from Europe. This makes European exporters the main competitors of Hoogenhoff.

The Brexit could have a huge effect on the trade of goods and services in the UK and for the European Union Member States. This heavily depends on the outcome of the negotiations between the UK and EU Member States. Negotiations will be tough since the UK aims to have the most free trade of goods and services as possible. If the negotiations turn out to be in favor of the UK, the EU has the risk of losing more member states. Although there are no decisions taken about future trade, there are already possible outcomes with their consequences been drawn up which will give insight what might happen when a certain decision is made. At the moment while negotiations still take place, the most possible outcomes will be a bilateral agreement or a WTO agreement.





## 5 Porter Five Forces

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Porter's Five Forces is a simple but powerful tool for understanding the competitiveness of Hoogenhoff's business environment, and for identifying the potential profitability of the strategies. When the forces in the environment or industry are defined and understood, marketing strategies can be implemented correctly. Below the Five forces of Porter are explained and described (Porter, 2017).

### 5.1 Competitive rivalry

The competitive rivalry in the UK market is high. It is a large market with a large number of competition from outside the UK, exporting oak timber products. Hoogenhoff also faces competition from their own buyers since timber merchants and agencies in the UK also import the oak timber directly at the source (sawmill). Companies like Florian and Cora in Italy own sawmills in Croatia and warehouses in both Italy and Croatia from where they store and distribute the timber from. Nevertheless, according to Hoogenhoff, the quality of Oak supplied by these large Italian companies is less than Hoogenhoff. Hoogenhoff only purchases the best timber with no defects concerning Prime (QF1a) timber.

### 5.2 The power of Suppliers

The ease for Hoogenhoff's suppliers (sawmills) to increase their prices is high, since there is a high demand for Oak timber and a shortage of raw material at sawmills. This forces prices to increase. Especially during the first 3 months of 2018, prices of Oak timber went up with, in some cases, 25% due to a shortage of logs in mainly France. This has resulted in increased prices. At the moment, with a more stable supply of raw materials, the prices have decreased slowly. Companies able to deliver from stock during these first few months could have gained large profit. The product provided by the suppliers isn't that unique (roughsawn Oak timber). Hoogenhoff differentiates themselves by excellent drying and selling high quality dried products. Oak timber tends to be a very hard species for drying. Doing this properly can deliver high revenue.

### 5.3 The power of the buyer

The power of the buyers depends on the demand of the market and the availability of timber in stock at the merchants. If there is high demand of a certain quality in a certain length and thickness and availability is low, the distributor will set the price. If the availability is moderate to high, the power of the buyer becomes larger. In this case they are often able to force prices down by threatening to purchase at another supplier.

Furthermore, when new to a market, the power of the buyer can still be high since they have to leave suppliers to make trade deals with a new company in the market like Hoogenhoff. In order to make these trade deals, prices have to be low, lower than their main supplies in order to convince them to make trade deals.

In the UK market, a large amount of agencies and importers are located with importing volumes from 5000 – 10.000m<sup>3</sup> annually. When market share is reached with more customers, it is easier for Hoogenhoff to negotiate with new companies about the increase of prices.

#### 5.4 Threat of Substitution

The threat of substitution is low. Oak is the most popular hardwood timber species due to its heritage, its natural looks and its strength and durability. This gives Hoogenhoff a huge opportunity since they are specialized in drying and trading high (prime) quality and rustic quality oak timber. However, with the Brexit negotiations unclear, there could be stronger demand for American Oak timber. This because customs and tariffs on goods from the EU to the UK could threaten the trade of European Oak due to price increasing and the slow flow of the goods imported. Nevertheless, the demand for European Oak will still be high in the market.

#### 5.5 Threat of New Entry

Threat of new entry is high since it is an easy market to enter. Timber merchants, agencies and manufacturers are in high demand of oak timber in the UK. Competitors outside of the UK with a large stock volume could enter the UK market by selling their stock by a fair price, due to the high demand of Oak.

## 6. SWOT analysis

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This chapter discusses the Strengths and Weaknesses of Hoogenhoff according to the internal analysis and the Opportunities and Threats in the market according to the external analysis and the Five Forces of Porter. Table 3 provides a SWOT overview.

### Strengths

Due to a large stock with a large variety of different sizes and qualities, Hoogenhoff is able to deliver the timber needed by the industry fast. Thanks to their twelve dry kilns they have excellent drying capacity which allows them to carefully dry the timber without a rush. This together with more than 25 years of drying expertise makes them a leading business of dried Oak timber into the market(s). With only two hired employees, who are experts in their specialism, Hoogenhoff is able to work very efficient and keep the costs low. This results in more competitive timber prices, more revenue and ultimately more profit. Furthermore Hoogenhoff is FSC and PEFC certified, which gives them advantage in markets where trade in durable products has high priority. Transportation is done by a third party or the customers come pick up their orders themselves. This reduces transportation costs, the costs of at least one employee and the costs of owning and servicing a truck.

### Weaknesses

Hoogenhoff imports green Oak timber, dries the timber in their dry kilns and sells the timber to its customers. The only value added is the drying process, where the competition is also focused on machining the timber to attract new customers by adding more value to the timber. Most timber merchants in the UK are also specialized in machining timber to have more variety of products in stock. Because competition and demand for Oak timber are large, a high level of acquisition is needed to keep customers and to obtain new customers. This accounts mainly for the Dutch market. The market which has the main focus of Hoogenhoff since they have high market share in trading Oak timber. Another weakness are the profit margins of the timber. If Hoogenhoff tends to sell their timber on the English market with the same profit margins they use in the Dutch market, it can be very hard to sell timber. This because they have to purchase the timber from the source and sell it to another timber merchant in the UK, who also applies its own profit margin on the timber products they sell into the UK market. Selling from business to business with low profit margin can be quite hard and often results in no sales.

### Opportunities

Depending on the outcome of the Brexit, it could be an opportunity for Hoogenhoff into the UK hardwood market. If the UK stays in the EU single market, low tariffs and less custom control is needed for trading goods and services, which ultimately results in almost no further costs and very good trading relations between the UK and the Netherlands. The UK hardwood market is a large market with a high demand for European Oak timber. They are the third largest importer of Hardwoods worldwide. This makes the market very interesting for Hoogenhoff to distribute their products. Besides all this, the UK has always been a very important trading partner of the Netherlands. Market research and contributions to a

conference have showed that the popularity of European Oak is still increasing due to its heritage esthetics and working properties.

### Threats

The fluctuations in the market, regarding the supply of raw materials, could be a serious threat for Hoogenhoff when entering the UK market. Due to high demand for European Oak in the EU, UK and China, prices increase and timber becomes very hard to sell B2B with a reasonable profit. Furthermore the outcome of the Brexit can be a serious threat when trading with the UK. If negotiations with the EU turn out for the UK to sign a WTO agreement, several costs due to customs, tariffs on goods and administrative work will come on top of the product price, which can increase the product price significantly. If this is in reach, competition from the US is likely to increase. Timber importers and merchants in the UK will be searching for the best possible substitute product for the lowest possible price. Furthermore, competition from EU exporters is high. Italian exporters, owning sawmills in Croatia, export large volumes to the UK, while French sawmills are the main supplier of beams and boules to the UK market.

<b>Strengths</b> <ul style="list-style-type: none"> <li>- Large stock volume – fast delivery</li> <li>- Deliver high quality dried timber</li> <li>- Large variety of sizes and qualities</li> <li>- Excellent drying experience</li> <li>- More than 50 years of trading experience</li> <li>- Low personnel costs (only few employees compared company size)</li> <li>- Employees experts in their specialism (drying -green oak timber)</li> <li>- FSC PEFC certified (high demand UK)</li> <li>- Third party for transport, low costs</li> </ul>	<b>Weaknesses</b> <ul style="list-style-type: none"> <li>- Drying the timber – only value added</li> <li>- High level of acquisition (not easy to Keep same customers)</li> <li>- Focus mainly on Dutch market</li> <li>- Low profit margin</li> <li>- Long drying times for thick timber</li> </ul>
<b>Opportunities</b> <ul style="list-style-type: none"> <li>- BREXIT (depending on outcome)</li> <li>- Large Market</li> <li>- 3<sup>rd</sup> Largest importer of Hardwood timber</li> <li>- Lots of use European Oak (Oak Framed Building and furniture products)</li> <li>- UK important business partner for Netherlands</li> <li>- Popularity of Oak keeps increasing due to its heritage, properties, durability etc.</li> </ul>	<b>Threats</b> <ul style="list-style-type: none"> <li>- BREXIT (depending on outcome)</li> <li>- Shortage of oak timber in Central Europe</li> <li>- Imports of American oak species on UK market</li> <li>- Competition in the market</li> <li>- Fluctuations in market, unstable log demand (France)</li> <li>- Variation in Price</li> </ul>

TABLE 3: SWOT OVERVIEW

## 7. Marketing strategies/tactics

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The UK timber market is segmented in Hardwood and softwood timber. Although hardwood timber uses only account for about 5%, the UK imports an annual volume of about 427.000m<sup>3</sup> (appendix 9). Of this number, 36,7 percent is dominated by the use of Oak timber. Since Hoogenhoff only sells rough sawn Oak timber, there is no need to apply more market segmentation and only focus on timber importers, traders and manufacturers of Oak timber. This is a basic imported product which will be further manufactured by its customers. All companies involved in the trade of Oak timber and manufacturing belong to this market segment. According to the Ansoff Matrix, Hoogenhoff will enter an existing market with an already known product. The marketing strategy which belongs to this marketing model is called market penetration. The aim of Hoogenhoff is to sell square edge, kiln dried European Oak timber to the UK hardwood market. The Marketing strategies for Hoogenhoff are displayed according to the four P's, Product, Price Place and Promotion.

### Product

Prime quality European Oak is a high quality timber product which is widely used throughout the country (UK) due to its esthetic properties. European Oak is durable, it machines well and the heritage of the timber species make it very popular in the UK market with rising demand still. Prime quality European Oak timber is used for furniture (tables, kitchen tops), stairs, staircases and interior- and exterior joinery.

For Hoogenhoff it is need to sell products to the market where the demand in the market is high with a shortage of the product. For example, Long lengths of strait Prime timber 4/4 sides clear, 50mm thick used for staircase rail and columns are in high demand but there is a shortage in the market due to defects during drying (Cooper, 2018). These long lengths tend to bend, warp an crook. Hoogenhoff distinguishes themselves by only purchasing Prime timber 4/4 sides clear with no defects. Their expertise in drying offer them an advantage on the competition.

### Price

Prices in both markets, the Netherlands and the UK are about the same according to Hoogenhoff. In order to be able to sell square edged Oak timber with a profit margin to timber importers/merchants in the UK, compromises have to be made. This because timber traders in the UK also sell the product mainly B2B. Timber has to be priced in such a way it remains attractive for UK buyers to still gain a small percentage of profit.

To begin with a low pricing tactic in the beginning and first gain consumer trust, satisfaction and deliver quality products, will create a stable position in the market. If sable in market, start increasing prices to gain more profit while still continuing to deliver quality and handle complaints, if there are any, professionally and achieve consumer satisfaction.

## Place

Hoogenhoff is situated in Mill, the Netherlands. They mainly supply European Oak timber to the Dutch market. According to Hoogenhoff, the Dutch market becomes saturated. There is still high demand for European Oak timber but also lots of competition in the Netherlands. To reduce the dependency on one market, Hoogenhoff is planning to expand their sales to the UK as a side market, since the Netherlands is an important trading partner for the UK and the market potential for the sales of Oak timber is high.

With the goal of selling 500m<sup>3</sup> within the first two years, seeing the UK as a side market to the Dutch home market, and sales expected to add up to 1000 m<sup>3</sup> to the UK within five years, it won't be relevant to start a subsidiary company or a distribution center in the UK. To hire personnel, build dry storage involves more costs while the targeted sales volumes are based on the UK as a side market. It will only be interesting when a larger volume can be distributed in the UK. Hire personnel in the UK to sell your timber, they must be really committed to the company with sales growing by the year is not going to be achieved in five years. Annual sales of 1000m<sup>3</sup> would be too less for a hired staff member annually in order to gain maximum profit. Therefore, all possible costs involved in starting a subsidiary company in the UK, it would not be profitable in the first five years.

Because the UK will be a side market for the first years, Hoogenhoff is bound to distribute their products from their company site in Mill, the Netherlands. Transport costs are of no big influence since customers often arrange their own transport and the value of the transported goods (kiln dried Prime Oak quality timber) make transportation to the UK acceptable without increasing costs.

## Promotions

Promoting the product can be done in several manners. E-mail marketing by means of collective mailings, advertise in trade journals, visit fairs and conferences, apply active acquisition, word of mouth, Social media marketing and SEO (search engine optimization) are the main promotional options for a timber trading company as Hoogenhoff.

- E-mail marketing: According to the list of potential customers which has been drawn up, a collective mailing with information about their current stock list could be send to those potential customers. Through e-mail marketing a large audience can be reached at the same time for very low to no costs. The email database is owned by Hoogenhoff and they have the responsibility to deal with the information confidentially.
- To place advertisements in Trade journals like TTJ (Timber Trade Journals), and to be known as associated member of Federations like the (TTF) and (CTI), potential customers can find the company and obtain company information from those federations for further business.
- To visit fairs and conferences regarding the trade of Oak timber in the UK provides both information about the market and business relations with potential customers.
- Applying active acquisition, by visiting potential customers and offer your product. Make acquaintance with potential customers and let them get to know you and your company to build a professional relationship for future business.
- Word of mouth promotion where customers of your product recommend your product to other potential customers. This promotion technique often occurs without noticing, by businesses talk to other businesses about the product and recommends purchasing products at Hoogenhoff.

Hoogenhoff already uses Facebook as a social media tool for marketing their products. This is currently done in the Netherlands. Search Engine Optimization (SEO) can be very helpful when potential customers are searching for your products. To provide the internet side of the company in several languages, customers from other countries can search your company in their own native language. Furthermore, easier and more chance of being found on the internet. The content of the internet site of Houtimport v.d. Hoogenhoff is already described in four languages (Dutch, English, German and French). This ensures that Hoogenhoff is easily found on the internet by searching oak timber in several different languages.





## 8. Marketing advice Recommendations

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This chapter outlines a marketing recommendations for Hoogenhoff how they should promote their product and position their sales on the UK hardwood market in order to gain marketshare and sell an annual amount of European Oak timber on the UK hardwood market.

- Apply active acquisition, visit companies in the UK with great customer potential to obtain knowledge about the companies and to build up relationships for future business.
- Register the company as associate member at trade federations to be found by members of this federation. Also visit fairs and conferences regarding trade of hardwoods and Oak timber. Through this way, Hoogenhoff is able to meet potential customers.
- Stock products which are in high demand in the UK, so fast delivery is possible. Long lengths of straight clear timber in thicknesses 40 and 50-52mm are in high demand while availability is low.
- Adjust the price to market, if necessary, enter the market with lowered prices and less profit margin. This to first gain market share and consumer thrust, then increase the price with a certain suitable profit percentage.
- Differentiate themselves with high quality end products, achieved by excellent drying and strict quality control during timber purchase and sales.

To be active on the market in the first year, promoting Hoogenhoff's products and services according to the above stated actions, sales of 500m<sup>3</sup> should be reached in the second year with a small profit margin. To improve sales and to actively promote the products according to the sales tactics stated above, the sales of 1000m<sup>3</sup> should be reached with the desired profit margin.



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## 10. Appendix

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Appendix 1 Timeframe Methodology

Appendix 2 The Business Model Canvas

Appendix 3 The Value Proposition Canvas

Appendix 4 Grades of European Oak timber specified by the EOS

Appendix 5 UK main Hardwood imports in % by species and country in 2016

Appendix 6 American Hardwood exports to the UK in volume x 1000m<sup>3</sup>

Appendix 7 Figures of French exports of Sawn European Oak timber

Appendix 8 Price index of Oak Saw logs in France

Appendix 9 Volume of hardwoods in the UK market 2016

Appendix 10 UK European Oak timber price calculations.

Appendix 11 List of companies trading/machining Oak timber in UK

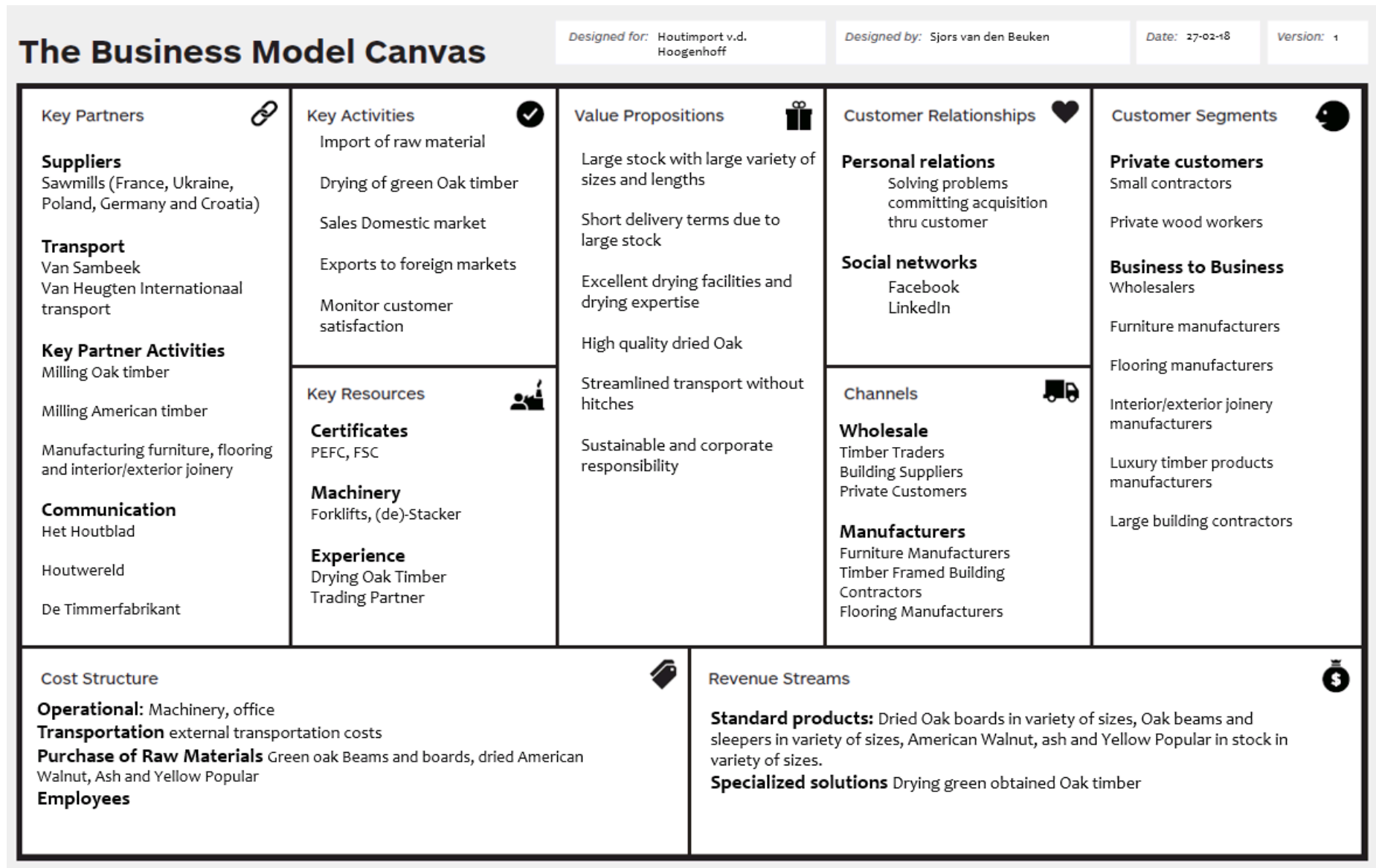
## Appendix 1 Timeframe Methodology

Week/Date	Monday	Tuesday	Wednesday	Thursday	Friday
Week 3 (19 - 23 February)					Concept <b>Project plan</b>
Week 4 (26 Feb - 2 March)			Discussion VHL		
Week 5 (5 - 9 March)					
Week 6 (12 - 16 March)					
Week 7 (19 - 23 March)	<b>Final Project Plan</b>				
Week 8 (26 - 30 March)					
Week 9 (2 - 6 April)					
Week 10 (9 - 13 April)					
Week 11 (16 - 20 April)					
Week 12 (23 - 27 April)					
Week 13 (30 April - 4 May)					
Week 14 (7 - 11 May)					
Week 15 (14 - 18 May)					
Week 16 (21 - 25 May)				Concept final thesis	
Week 17 (28 May - 1 june)					
Week 18 (4 - 8 June)				<b>Final Thesis</b>	
Week 19 (11 - 15 June)					
Week 20 (18 - 22 June)				Colloquia	Colloquia

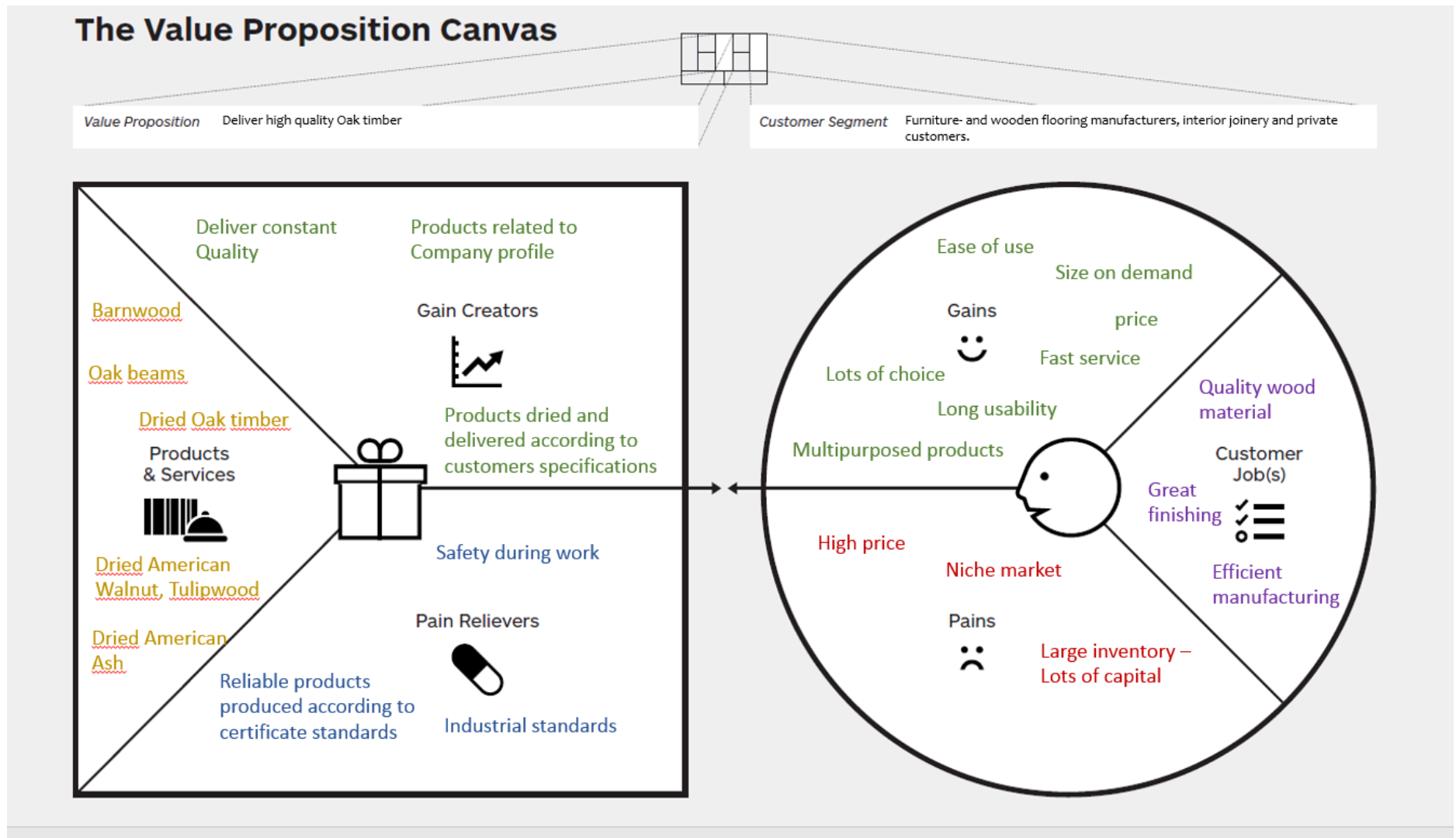
	Projectplan
	Step 1
	Step 2
	Step 3
	Step 4
	Step 5
	Step 6
	Step 7
	Step 8
	Step 9
	Step 10
	Step 11
	Step 12



## Appendix 2 The Business Model Canvas



### Appendix 3 The Value Proposition Canvas



## Appendix 4 Grades of European Oak timber specified by the EOS

### Strips and square-edged timber



For all grades, the letter X indicates the presence of sound sapwood less than two thirds of the thickness, and XX if it is present on both faces.

#### Grades Q-F 1a

- Pieces with a straight grain (3%) free of features other than sound knots.
- One sound knot less than 10 mm is permitted in pieces with a width less than 120 mm (two knots for other pieces).
- 20% of pieces may have an additional sound knot on the face.

#### Grades Q-F 1b

- Pieces are practically free of features other than sound knots. Sound knots less than 5 mm are ignored.
- Three knots less than 12 mm are permitted in pieces with a width less than 120 mm and one extra knot for every additional 40 mm in width in case of wider pieces.

8



#### Grades Q-F 2

- Pieces are practically free of features other than knots.
- Sound knots less than 5 mm are ignored.
- Three knots less than 25 mm are permitted in pieces with a width less than 120 mm and one extra knot for every additional 40 mm in width in case of wider pieces.

#### Grades Q-F 3

- Sound knots less than 10 mm are ignored.
  - Three knots less than 40 mm are permitted in pieces with a width less than 120 mm and one extra knot for every additional 40 mm in width in case of wider pieces.
  - Tolerance for one dead or unsound knot less than 20 mm and wane less than 3 mm.
- Excluded: bark pocket, brown pith, rot, holes, board heart or exposed pith, included sapwood.



#### Grades Q-F 4

- Sound knots less than 70 mm, permitted without any restrictions.
  - Tolerance for two dead or unsound knots, one less than 35 mm and the other less than 20 mm.
  - Wane permitted up to 10% of the width and 20% of the length.
- Excluded: rot, holes.

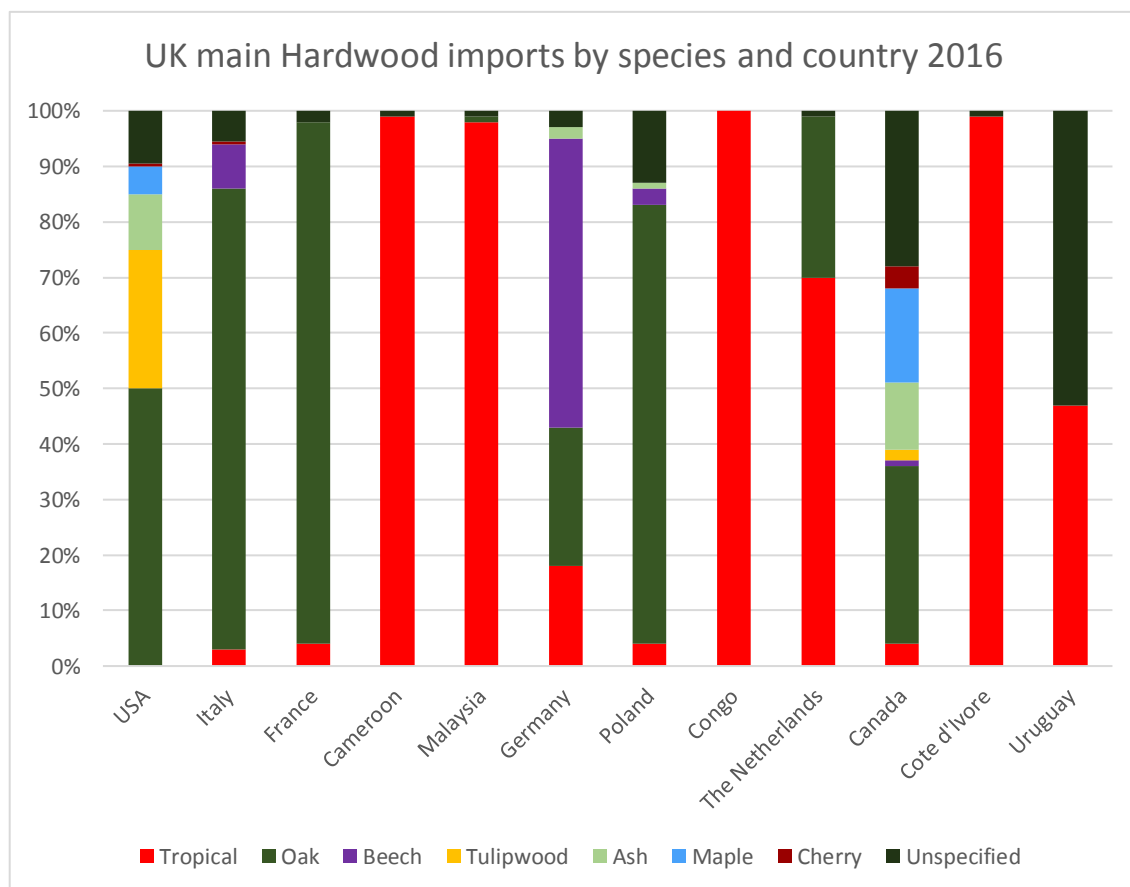
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Source: (French Timber, 2017)

## Appendix 5 UK main Hardwood imports in % by species and country in 2016

	Species ->								
Country	Tropical	Oak	Beech	Tulipwood	Ash	Maple	Cherry	Unspecified	Total
USA		50%		25%	10%	5%	1%	10%	100%
Italy	3%	83%	8%				1%	6%	100%
France	4%	94%						2%	100%
Cameroon	99%							1%	100%
Malaysia	98%	1%						1%	100%
Germany	18%	25%	52%		2%			3%	100%
Poland	4%	79%	3%		1%			13%	100%
Congo	100%								100%
The Netherlands	70%	29%						1%	100%
Canada	4%	32%	1%	2%	12%	17%	4%	28%	100%
Cote d'Ivoire	99%							1%	100%
Uruguay	47%							53%	100%
<b>Total average</b>	<b>30%</b>	<b>41%</b>	<b>6%</b>	<b>8%</b>	<b>3%</b>	<b>2%</b>	<b>1%</b>	<b>10%</b>	<b>100%</b>

Source: Authors calculations based on information Hardwood conference 2017 (Oliver, 2017)



Source: Hardwood conference 2017 (Oliver, 2017)

## Appendix 6 American Hardwood exports to the UK in volume x 1000m<sup>3</sup>

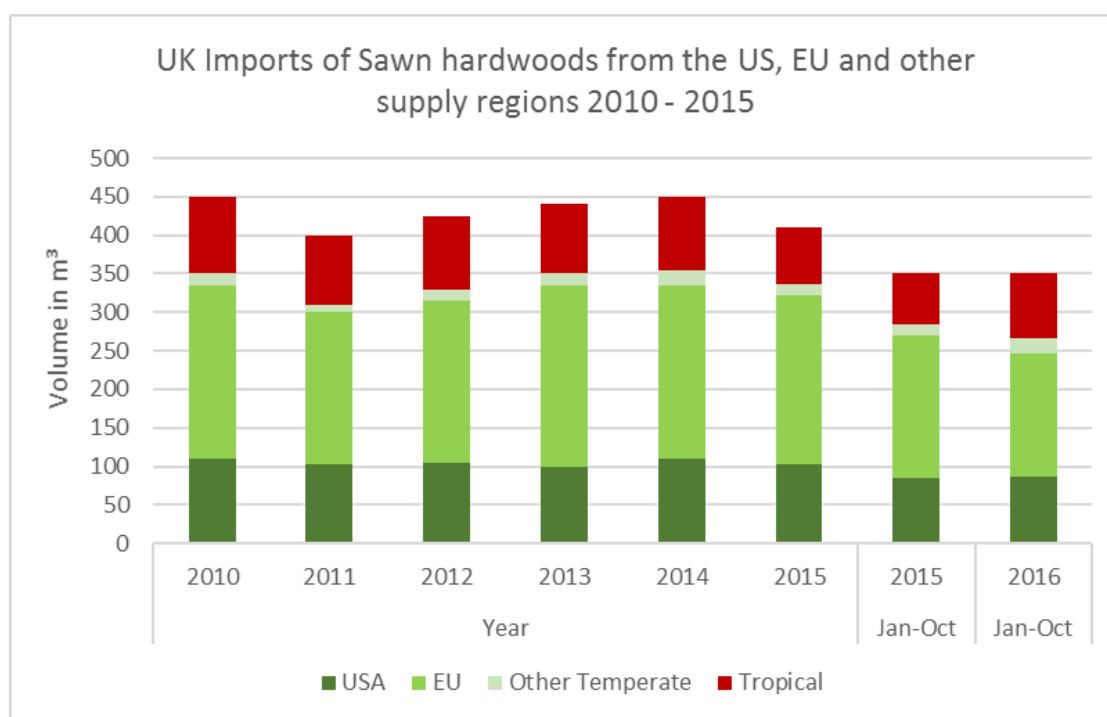
	Year						Jan-Nov	Jan-Nov
Wood type	2010	2011	2012	2013	2014	2015	2015	2016
White Oak	26	33	33,5	35	52	48	43	49,5
Tulipwood	10,5	12	18	20	25	22	21	24,5
Ash	8,5	10,3	11,5	10	12	10	9	8,5
Walnut	2,5	2,8	3	3,2	5	5,2	4,9	6
Red Oak	1,5	1,7	1,5	2	2,2	2,2	2	2,8
Maple	1	1,5	1,4	1,45	1,4	1,4	1,2	1,2
Other	3	6	5	4,5	4	1,2	1,1	1
Total	53	67,3	73,9	76,15	101,6	90	82,2	93,5

Source: (Oliver, 2017)

## UK Imports of Sawn Hardwoods from the US, EU and other supply regions 2010-2015

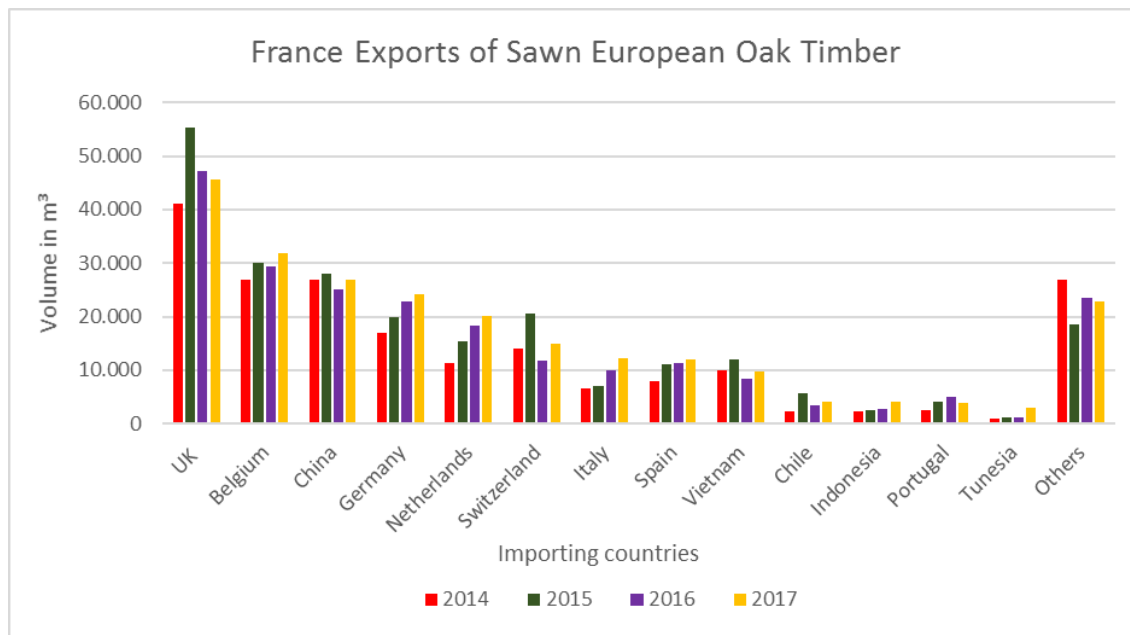
	Year						Jan-Oct	Jan-Oct
Country	2010	2011	2012	2013	2014	2015	2015	2016
USA	110	102	105	100	110	102	85	87
EU	225	198	210	235	225	220	185	160
Other Temperate	15	10	15	15	20	15	15	20
Tropical	100	90	95	90	95	73	65	83
Total	450	400	425	440	450	410	350	350

Source: (Oliver, 2017)



SOURCE: (OLIVER, 2017)

## Appendix 7 Figures of French exports of Sawn European Oak timber



Source: Jean Bernard Bahier, French sawmill association (Bahier, 2018)

### French Oak timber exports in m³

Countries	2014	2015	2016	2017
UK	41.104	55.289	47.222	45.726
Belgium	26.823	30.155	29.356	31.783
China	26.806	27.974	25.025	26.833
Germany	17.069	19.815	22.925	24.085
Netherlands	11.404	15.453	18.332	20.160
Switzerland	14.072	20.564	11.888	15.023
Italy	6.548	7.066	9.894	12.231
Spain	7.845	11.153	11.264	11.921
Vietnam	9.894	12.019	8.356	9.855
Chile	2.364	5.781	3.501	4.053
Indonesia	2.251	2.653	2.771	4.077
Portugal	2.592	4.039	4.983	3.948
Tunesia	963	1.115	1.249	3.055
Others	26.975	18.465	23.407	22.917
<b>Total</b>	<b>196.710</b>	<b>231.541</b>	<b>220.173</b>	<b>235.667</b>

### French Oak timber exports to China in m³, Incl. Oak logs

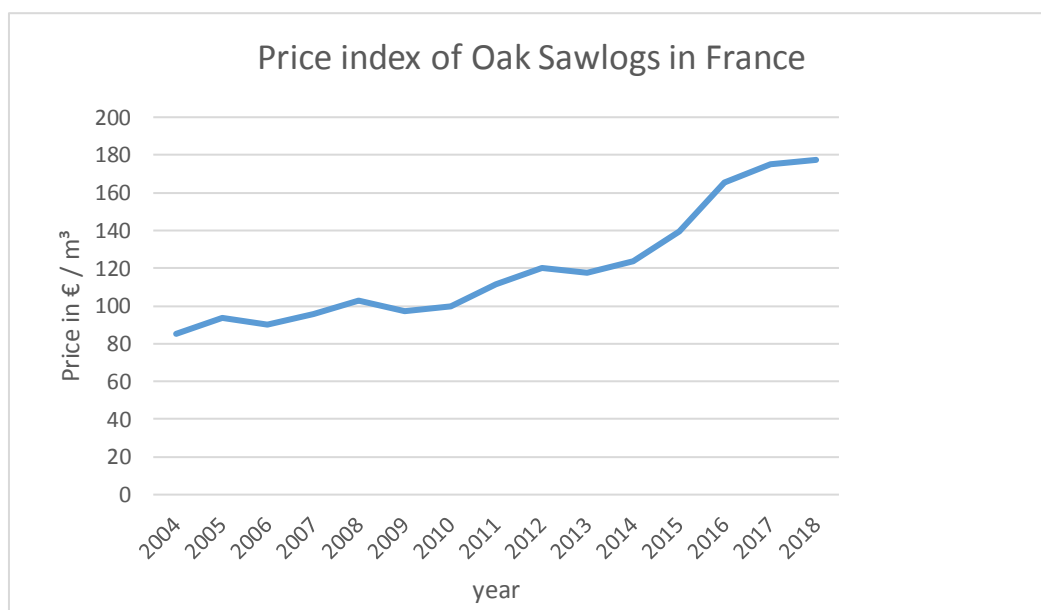
	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
<b>China</b>	4.220	2.310	4.311	20.745	27.379	16.848	15.484	32.138	31.683	27.471	46.424

Source: Jean Bernard Bahier, French sawmill association (Bahier, 2018)

## Appendix 8 Price index of Oak Saw logs in France

Year	2010	2011	2012	2013	2014	2015	2016	2017	2018
Price €/m <sup>3</sup>	100,0	111,5	120,1	117,5	123,8	139,3	165,4	174,9	177,4

Source: (Bahier, 2018)



**Appendix 9 Volume of hardwoods in the UK market 2016****Forestry Statistics  
2017: Trade****Table 3.2 Apparent consumption of wood products<sup>1,2</sup> in the UK, 2016**

Product	UK productio n	Import s	Export s	Apparent consumptio n	% UK Productio n	% Import s
Sawnwood (thousand m3)						
Coniferous (softwoods)	3.624	6.219	166	9.677		
Non-Coniferous (hardwoods)	47	427	25	449	10,5	89,5
Total	3.671	6.646	191	10.125		
Woodbased panels (thousand m3)						
Veneer sheets	0	26	3	23		
Plywood	0	1.479	66	1.413		
Particleboard	2.349	1.089	182	3.256		
Fibreboard	684	816	65	1.435		
Total	3.033	3.410	315	6.128		
Paper & paperboard (thousand tonnes)						
Graphic papers	897	3.232	292	3.837		
Sanitary & household papers	728	377	16	1.089		
Packaging materials	1.800	2.184	340	3.644		
Other paper & paperboard	250	153	112	291		
Total	3.675	5.946	760	8.861		

Source: industry surveys, industry associations, UK overseas trade statistics (HM Revenue & Customs)

## Notes:

1. Excludes other wood products, e.g. fuelwood and round fencing.
2. Excludes roundwood and intermediate products (e.g. sawmill products, pulp and recovered paper) to avoid double counting.

Release Date: 28  
September 2017  
(Forestry Commission, 2017)



## Appendix 10 UK European Oak timber price calculations.

### Calculations according to the stock list for Prime (QF1a) timber

Given the price in  $\text{ft}^3$  multiplied by the converting number of  $\text{ft}^3/\text{m}^3$ , the price per  $\text{£}/\text{m}^3$  is calculated. Hereafter the price in  $\text{£}/\text{m}^3$  can be converted to a price in  $\text{€}/\text{m}^3$ , which can be more comparable with the prices of Hoogenhoff since they only sell in Euro.

For converting:  $1\text{m}^3 = 35,315\text{ft}^3$  (Asknumbers, 2018) and  $\text{£}1 = \text{€}1,1439$  (Wisselkoers, 2018)

**Thickness 27mm**      *length 2.5m*      *Price £36,95/ft<sup>3</sup>*      *Pack size 2,061m<sup>3</sup>*

$\text{£}36,95/\text{ft}^3 \times 35,315\text{ft}^3 = \text{£}1.304,81/\text{m}^3$      $\text{£}1.304,81 \times \text{€}1,1439 = \text{€}1497,67,-/\text{m}^3$

**Thickness 50mm**      *Length 3m*      *Price £49,95/ft<sup>3</sup>*      *Pack size 3,082m<sup>3</sup>*

$\text{£}49,95/\text{ft}^3 \times 35,315\text{ft}^3 = \text{£}1.798,20/\text{m}^3$      $\text{£}1.798,20 \times \text{€}1,1439 = \text{€}2.056,96,-/\text{m}^3$

**Thickness 65mm**      *Length 3m*      *Price £55,95/ft<sup>3</sup>*      *Pack size 2,468m<sup>3</sup>*

$\text{£}55,95/\text{ft}^3 \times 35,315\text{ft}^3 = \text{£}1.975,93,-/\text{m}^3$      $\text{£}1.975,93,- \times \text{€}1,1439 = \text{€}2.261,82,-/\text{m}^3$

**Thickness 80mm**      *Length 3,2m*      *Price £59,95/ft<sup>3</sup>*      *Pack size 2,149m<sup>3</sup>*

$\text{£}59,95/\text{ft}^3 \times 35,315\text{ft}^3 = \text{£}2.117,10,-/\text{m}^3$      $\text{£}2.117,10,- \times \text{€}1,1439 = \text{€}2.422,59/\text{m}^3$

**Thickness 100mm**      *Length 3,2 m*      *Price £81,50/ft<sup>3</sup>*      *Pack size 1,872m<sup>3</sup>*

$\text{£}81,50/\text{ft}^3 \times 35,315\text{ft}^3 = \text{£}2.878,18,-/\text{m}^3$      $\text{£}2.878,18,- \times \text{€}1,1439 = \text{€}3.293,49,-/\text{m}^3$

### Calculations according to the stock list for Rustic (QF2/3) Timber

Given the price in  $\text{ft}^3$  multiplied by the converting number of  $\text{ft}^3/\text{m}^3$ , the price per  $\text{£}/\text{m}^3$  is calculated. Hereafter the price in  $\text{£}/\text{m}^3$  can be converted to a price in  $\text{€}/\text{m}^3$ , which can be more comparable with the prices of Hoogenhoff since they only sell in Euro.

For converting:  $1\text{m}^3 = 35,315\text{ft}^3$  (Asknumbers, 2018) and  $\text{£}1 = \text{€}1,1439$  (Wisselkoers, 2018)

**Thickness 27 mm**      *Length 3.05m*      *Price £23.95,-/ft<sup>3</sup>*      *Pack size 2,186m<sup>3</sup>*

$\text{£}23.95,- \times 35,315\text{ft}^3 = \text{£}845,85,-/\text{m}^3$      $\text{£}845,85,- \times \text{€}1,1439 = \text{€}967,57,-/\text{m}^3$

**Thickness 32mm**      *Length 3.00m*      *Price £22.95,-/ft<sup>3</sup>*      *Pack size 1,827m<sup>3</sup>*

$\text{£}22.95,- \times 35,315\text{ft}^3 = \text{£}810,49,-/\text{m}^3$      $\text{£}810,49,- \times \text{€}1,1439 = \text{€}927,20,-/\text{m}^3$

**Thickness 50mm**      *Length 2.90m*      *Price £24.95,-/ft<sup>3</sup>*      *Pack size 2,858m<sup>3</sup>*

$\text{£}24.95,- \times 35,315\text{ft}^3 = \text{£}881,11,-/\text{m}^3$      $\text{£}881,11,- \times \text{€}1,1439 = \text{€}1.007,90,-/\text{m}^3$

**Thickness 80mm**      *Length 2.90m*      *Price £30.95,-/ft<sup>3</sup>*      *Pack size 1,174m<sup>3</sup>*

$\text{£}30.95,- \times 35,315\text{ft}^3 = \text{£}1.092,98,-/\text{m}^3$      $\text{£}1.092,98,- \times \text{€}1,1439 = \text{€}1.250,26,-/\text{m}^3$

Authors calculations 2018, based on stock list (Timber Connection, 2018)

## Appendix 11 List of companies Trading/Manufacturing Oak timber in UK

Name	Place	Internet	Type of business
Carter Turner	Clavering	<a href="http://www.carterturner.co.uk">www.carterturner.co.uk</a>	Agency
East West Timber Ltd	Northwood	-	Agency
Edmund Robson & Co Ltd	South Shields	-	Agency
Finewood Marketing Ltd	Hove	<a href="http://www.finewoodmarketing.com">www.finewoodmarketing.com</a>	Agency
Greentimber Forest Products	Sawbridgeworth	<a href="http://www.greentimber.com">www.greentimber.com</a>	Agency
Hunt Brothers & Co Ltd	Wirral	-	Agency
Knock Bay Hardwoods Ltd	Felbridge	-	Agency
M.S. Timber Ltd	Belfast	<a href="http://www.mstimber.com/">http://www.mstimber.com/</a>	Agency
Marcham Wood Products Agency	Bristol	<a href="http://www.mwpa.co.uk">www.mwpa.co.uk</a>	Agency
Newood Agency Limited	London	-	Agency
Oregon-Canadian Europe Ltd	Wigan	<a href="http://www.oregoncanadian.com">www.oregoncanadian.com</a>	Agency
Petal Timber Agency	Lancaster	<a href="http://www.petaluk.com">www.petaluk.com</a>	Agency
Roger Mitchell Ltd	Headley, Bordon	<a href="http://www.rmukltd.co.uk">www.rmukltd.co.uk</a>	Agency
Timber Link International	Hadlow	<a href="http://www.timberlinkinternational.com/">www.timberlinkinternational.com/</a>	Agency
Toro Timber International	Reading	-	Agency
Tradewinds International (Timber) Ltd	Bristol	-	Agency
Trunkstyle Ltd	New Milton	<a href="http://www.trunkstyle.co.uk">www.trunkstyle.co.uk</a>	Agency
Wellwood Ltd	Buxted	-	Agency
WIA Wood International Agency	Brentwood	<a href="http://woodia.co.uk">http://woodia.co.uk</a>	Agency
RJC Agencies Ltd	Chandlers Ford	<a href="http://www.rjctimberagents.com">www.rjctimberagents.com</a>	Agency
Alsford Timber Ltd	Uckfield	<a href="http://www.alsfordtimber.com">www.alsfordtimber.com</a>	Building supplier
Andersons Ltd	Carlisle	<a href="http://www.andersonsltd.com">www.andersonsltd.com</a>	Building supplier
Arnold Laver & Co Ltd	Sheffield	<a href="http://www.timberworld.co.uk">www.timberworld.co.uk</a>	Building supplier
Arnold Laver Timber	Bradford	<a href="http://www.laver.co.uk">www.laver.co.uk</a>	Building supplier
B W May & Son Ltd	Sittingbourne	<a href="http://www.bwmay.co.uk">www.bwmay.co.uk</a>	Building supplier
Colin Myers Timber Ltd	Widnes	<a href="http://www.colinmyerstimber.co.uk">www.colinmyerstimber.co.uk</a>	Building supplier
Hancock & Brown (Timber) Ltd	Swansea	<a href="http://www.hancockandbrown.co.uk">www.hancockandbrown.co.uk</a>	Building supplier
J. P. Corry Group	Belfast	<a href="http://www.jpccorry.com">www.jpccorry.com</a>	Building supplier
Makerfield Timber	Wigan	<a href="http://www.makerfieldtimber.co.uk">www.makerfieldtimber.co.uk</a>	Building supplier
Norman Ltd	Jersey	<a href="http://www.normans.je">www.normans.je</a>	Building supplier
NY Timber Ripon	Ripon	<a href="http://www.nytimber.co.uk">www.nytimber.co.uk</a>	Building supplier
TBG Timber Buying Group	Whitchurch	<a href="http://www.timberbuyinggroup.co.uk">www.timberbuyinggroup.co.uk</a>	Federation
Priory Hardwoods	Barkisland	<a href="http://www.prioryhardwoods.com">www.prioryhardwoods.com</a>	Flooring Specialist
Oakra Hardwood Flooring	Ritchhill	<a href="http://www.oakraflooring.co.uk">www.oakraflooring.co.uk</a>	Flooring supplier
Richard Stamp agencies	Chipping Norton	<a href="http://www.richardstampagencies.com">www.richardstampagencies.com</a>	Furniture imports
A & A Joinery & Woodworking Ltd	West Midlands	-	Furniture manufacturer
A & C Joinery	Ilminster	<a href="http://www.acjoinery.co.uk">www.acjoinery.co.uk</a>	Furniture manufacturer
A & C R Patchitt Partnership	Sandiacre	<a href="http://www.patchitt-joinery.co.uk">www.patchitt-joinery.co.uk</a>	Furniture manufacturer
A & K Joiners Ltd	Essex	-	Furniture manufacturer
A & W Gowers Limited	Chelmsford	<a href="http://www.special-joinery.com">www.special-joinery.com</a>	Furniture manufacturer

A A Joinery (Poole) Ltd	Poole	-	Furniture manufacturer
A A Taylor Ltd	Brighton	<a href="http://www.aataylor.co.uk">www.aataylor.co.uk</a>	Furniture manufacturer
A A Taylor Ltd	Brighton	<a href="http://www.aataylor.co.uk">www.aataylor.co.uk</a>	Furniture Manufacturer
A B L Doors & Windows Ltd	Earls Colne	<a href="http://www.abldoors.co.uk">www.abldoors.co.uk</a>	Furniture Manufacturer
A R Manley & Son Ltd	Shrewsbury	<a href="http://www.armanley.co.uk">www.armanley.co.uk</a>	Furniture manufacturer
A R Manly & Son Ltd	Shrewsbury	<a href="http://www.armanley.co.uk">www.armanley.co.uk</a>	Furniture Manufacturer
A Shotton Ltd	Huddersfield	<a href="http://www.ashotton.co.uk">www.ashotton.co.uk</a>	Furniture manufacturer
A.J. Buckle Joinery	Alton	<a href="http://www.ajbucklejoinery.co.uk">www.ajbucklejoinery.co.uk</a>	Furniture manufacturer
A.J. Joinery Limited	Cockfield	<a href="http://www.ajjoinery.co.uk">www.ajjoinery.co.uk</a>	Furniture manufacturer
Abbey Joinery	Centre Holywell	-	Furniture manufacturer
Abbey Joinery Hull Ltd.	Hull	<a href="http://www.abbeyjoinery.net">www.abbeyjoinery.net</a>	Furniture manufacturer
ABS Joinery	Mildenhall	<a href="http://www.ocksedge.com">www.ocksedge.com</a>	Furniture manufacturer
Absolute Joinery SW Ltd	Wadebridge	<a href="http://www.absolutejoinerysw.co.uk">www.absolutejoinerysw.co.uk</a>	Furniture Manufacturer
Ackroyd & Abbott Ltd	Sheffield	-	Furniture manufacturer
Acre Joinery Ltd	Norwich	<a href="http://www.acrejoinery.co.uk">www.acrejoinery.co.uk</a>	Furniture manufacturer
Acrelane Joinery Ltd	Croydon	-	Furniture manufacturer
Adrian Eves	Rochford	<a href="http://www.adrian-eves.co.uk">www.adrian-eves.co.uk</a>	Furniture manufacturer
AJB Woodworking Ltd	Leicester	<a href="http://www.ajb-group.co.uk">www.ajb-group.co.uk</a>	Furniture manufacturer
AJS Joinery	Ulverston	-	Furniture Manufacturer
Alder Engineeering LTD	Perivale	-	Furniture Manufacturer
All Aspects of Architectural Joinery Ltd	Trowbridge	<a href="http://www.aaarchitecturaljoinery.co.uk">www.aaarchitecturaljoinery.co.uk</a>	Furniture Manufacturer
all joinery Services Ltd	Green Lane	-	Furniture Manufacturer
Allan Brothers Ltd	Berwick Upon Tweed	<a href="http://www.allanbrothers.co.uk">www.allanbrothers.co.uk</a>	Furniture manufacturer
Allenby's of Anwick Limited	NR Sleaford	<a href="http://www.anwickjoinery.co.uk">www.anwickjoinery.co.uk</a>	Furniture manufacturer
Allenby's Of Anwick Ltd	Anwick	<a href="http://www.allenbysofanwickltd.com">www.allenbysofanwickltd.com</a>	Furniture Manufacturer
Allgood Plc	London	<a href="http://www.allgood.co.uk">www.allgood.co.uk</a>	Furniture manufacturer
Alpine Joinery Ltd	Kent	<a href="http://www.alpinejoineryfrant.co.uk">www.alpinejoineryfrant.co.uk</a>	Furniture manufacturer
Andrew Horner & Son Ltd	Ormskirk	<a href="http://www.andrewhorner.co.uk">www.andrewhorner.co.uk</a>	Furniture manufacturer
Andrew Milward Joinery	Pembroke Dock	<a href="http://www.andrewmilward.co.uk">www.andrewmilward.co.uk</a>	Furniture Manufacturer
Applewood Joinery Limited	Romsey	<a href="http://www.applewoodjoinery.co.uk">www.applewoodjoinery.co.uk</a>	Furniture manufacturer
Ardboe Manufacturing Co Ltd	Dungannon	-	Furniture manufacturer
Artisan Joinery Ltd	Low Prudhoe	-	Furniture Manufacturer
Artisan Porjects Ltd	Bovey Tracey	<a href="http://www.artisanprojects.co.uk">www.artisanprojects.co.uk</a>	Furniture Manufacturer
Ashbocking Joinery Ltd	Ipswich	<a href="http://www.ashbockingjoinery.co.uk">www.ashbockingjoinery.co.uk</a>	Furniture Manufacturer
Ashfield Park Ltd	Salisbury	-	Furniture Manufacturer
Awlwood Joinery Ltd	Barnstaple	<a href="http://www.awlwoodjoinery.co.uk">www.awlwoodjoinery.co.uk</a>	Furniture manufacturer
B A Haxby Ltd	Barnsley	-	Furniture Manufacturer
B Murphy & Co	London		Furniture Manufacturer
B Y Joinery Ltd	Calne	<a href="http://www.byjoinery.co.uk">www.byjoinery.co.uk</a>	Furniture Manufacturer
Badman & Badman (Joinery) Ltd	Weston Super Mare	<a href="http://www.badmans.co.uk">www.badmans.co.uk</a>	Furniture manufacturer
Badman & Badman Ltd	Weston Super Mare	<a href="http://www.badmans.co.uk">www.badmans.co.uk</a>	Furniture Manufacturer
Balmoral Joinery Ltd	Newcastle upon Tyne	<a href="http://www.balmoraljoinery.co.uk">www.balmoraljoinery.co.uk</a>	Furniture Manufacturer
Banner Joinery Co Ltd	Andover	<a href="http://www.bannerjoinery.co.uk">www.bannerjoinery.co.uk</a>	Furniture manufacturer
Barr joinery Ltd	Thame	<a href="http://www.barrjoinery.co.uk">www.barrjoinery.co.uk</a>	Furniture Manufacturer

Barton Products Ltd	Nottingham	<a href="http://www.bartonbespoke.co.uk">www.bartonbespoke.co.uk</a>	Furniture manufacturer
Bartrams Ltd	Burton-on Trent-	<a href="http://www.bartramsjoinery.co.uk">www.bartramsjoinery.co.uk</a>	Furniture Manufacturer
Batty Joinery	-	<a href="http://www.battyjoinery.co.uk">www.battyjoinery.co.uk</a>	Furniture Manufacturer
Beard Evans Joinery Ltd	Gloucester	<a href="http://www.beardevansjoinery.co.uk">www.beardevansjoinery.co.uk</a>	Furniture Manufacturer
Ben Smith Joinery Ltd	Salisbury	<a href="http://www.bensmithjoinery.co.uk">www.bensmithjoinery.co.uk</a>	Furniture Manufacturer
Berrydesign	Nuwbury	<a href="http://www.berrydesign.co.uk">www.berrydesign.co.uk</a>	Furniture Manufacturer
Betec Joinery Ltd	Cirencester	<a href="http://www.betecjoinery.co.uk">www.betecjoinery.co.uk</a>	Furniture Manufacturer
Biker Contracts	Leyburn	<a href="http://www.bikercontracts.co.uk">www.bikercontracts.co.uk</a>	Furniture Manufacturer
Bishops Joinery Ltd	Southampton	<a href="http://www.bishopjoinery.co.uk">www.bishopjoinery.co.uk</a>	Furniture Manufacturer
BOA Joinery Ltd	Qauinton	<a href="http://www.boajoinery.com">www.boajoinery.com</a>	Furniture Manufacturer
Bond joinery Ltd	Totnes	<a href="http://www.bondjoinery.co.uk">www.bondjoinery.co.uk</a>	Furniture Manufacturer
Bradbeer Joinery	Wellington	-	Furniture Manufacturer
Broadley (Group) Ltd	Leeds	<a href="http://www.braodley-group.co.uk">www.braodley-group.co.uk</a>	Furniture Manufacturer
Brookeswood Architectural Joinery Ltd	Leek	<a href="http://www.brookeswood.com">www.brookeswood.com</a>	Furniture Manufacturer
Burwood Ltd	Sheffield	<a href="http://www.burwood-group.com">www.burwood-group.com</a>	Furniture Manufacturer
Busybee Builders Merchant Ltd	Hendon	<a href="http://www.busybee.com">www.busybee.com</a>	Furniture Manufacturer
C England Joinery Ltd	Coventry	<a href="http://www.cenglandjoinery.co.uk">www.cenglandjoinery.co.uk</a>	Furniture Manufacturer
C G Fry & Son	Dorchester	<a href="http://www.cgfry.co.uk">www.cgfry.co.uk</a>	Furniture Manufacturer
C R Hobby and Son	Kidderminster	-	Furniture Manufacturer
C. S. Robinson Ltd	Lincoln	<a href="http://www.oakfurnishedirect.net">www.oakfurnishedirect.net</a>	Furniture Manufacturer
Canopy Products Ltd	Bury	<a href="http://www.canopyproducts.co.uk">www.canopyproducts.co.uk</a>	Furniture Manufacturer
Carlton furniture	Nottingham	<a href="http://www.carltonfurniture.co.uk">www.carltonfurniture.co.uk</a>	Furniture Manufacturer
Castle Post Form and Bespoke Joinery Ltd	Rye	<a href="http://www.castlepostform.co.uk">www.castlepostform.co.uk</a>	Furniture Manufacturer
CDL Joinery	Barnstaple	<a href="http://www.cdlsouthwest.co.uk">www.cdlsouthwest.co.uk</a>	Furniture Manufacturer
Cheshire joinery Services Ltd	Great Barrow	<a href="http://www.cheshirejoineryservices.com">www.cheshirejoineryservices.com</a>	Furniture Manufacturer
Church & Gooderham Limited	Woodbridge	<a href="http://www.churchandgooderham.co.uk">www.churchandgooderham.co.uk</a>	Furniture Manufacturer
Churnet Valley Joinery Ltd	Oakmoor	-	Furniture Manufacturer
Claremont Joinery Ltd	Gateshead	<a href="http://www.claremontjoinery.co.uk">www.claremontjoinery.co.uk</a>	Furniture Manufacturer
Cole joinery Ltd	Luton	<a href="http://www.colejoinery.co.uk">www.colejoinery.co.uk</a>	Furniture Manufacturer
Conifer Joinery Ltd	Kidlington	-	Furniture Manufacturer
Core Products Ltd	Perth	<a href="http://www.coreproducts.co.uk">www.coreproducts.co.uk</a>	Furniture manufacturer
Cotswood Door Specialist Ltd	Southgate	-	Furniture Manufacturer
Cottage joinery Nottingham	Nottingham	<a href="http://www.cottage-joinery.co.uk">www.cottage-joinery.co.uk</a>	Furniture Manufacturer
Cottingham Joinery Co Ltd	Beverley	<a href="http://www.cottjoinery.co.uk">www.cottjoinery.co.uk</a>	Furniture Manufacturer
Croxford's	Holmfirth	<a href="http://www.croxfords.co.uk">www.croxfords.co.uk</a>	Furniture Manufacturer
CST Joinery	Chard	<a href="http://www.honitonjoinery.co.uk">www.honitonjoinery.co.uk</a>	Furniture Manufacturer
Cubby Construction Ltd	Carlisle	<a href="http://www.cubby.co.uk">www.cubby.co.uk</a>	Furniture Manufacturer
Curtis Timber Windows Ltd	Mitcham	<a href="http://www.curtistimberwindows.co.uk">www.curtistimberwindows.co.uk</a>	Furniture Manufacturer
D J Newman Joinery Ltd	St. Austell	<a href="http://www.djnewmanjoinery.co.uk">www.djnewmanjoinery.co.uk</a>	Furniture Manufacturer
D&P Joinery Ltd	Ross-on-Wye	<a href="http://www.d-p-joinery.co.uk">www.d-p-joinery.co.uk</a>	Furniture Manufacturer
Damian Cronin Ltd	Killingworth	-	Furniture Manufacturer
Dave Northey Carpentry and Joinery	Liskeard	<a href="http://www.davenorthey.co.uk">www.davenorthey.co.uk</a>	Furniture Manufacturer
Davies & Davies Joinery	Milford Haven	<a href="http://www.daviesanddaviesjoinery.co.uk">www.daviesanddaviesjoinery.co.uk</a>	Furniture Manufacturer
Davies Woodwork Ltd	Chester	<a href="http://www.davieswoodwork.co.uk">www.davieswoodwork.co.uk</a>	Furniture Manufacturer

DCB Joinery Ltd	Normanton	<a href="http://www.dcb.co.uk">www.dcb.co.uk</a>	Furniture Manufacturer
Designer Wooden Doors	Caxton Hill	<a href="http://www.designerwoodendoors.co.uk">www.designerwoodendoors.co.uk</a>	Furniture Manufacturer
DKR Joinery Ltd	Romsey	<a href="http://www.dkrjoinery.co.uk">www.dkrjoinery.co.uk</a>	Furniture Manufacturer
Dokic Joinery Ltd	Calne	<a href="http://www.dokicjoinery.co.uk">www.dokicjoinery.co.uk</a>	Furniture Manufacturer
E M joinery Services	Westham	<a href="http://www.emjoineryservices.co.uk">www.emjoineryservices.co.uk</a>	Furniture Manufacturer
Edgewood joinery	Bristol	<a href="http://www.edgewoodjoinery.co.uk">www.edgewoodjoinery.co.uk</a>	Furniture Manufacturer
Edisford Joinery & Construction Ltd	Clitheroe	-	Furniture Manufacturer
Edmont Ltd	Swindon	<a href="http://www.edmont.co.uk">www.edmont.co.uk</a>	Furniture Manufacturer
Elements Joinery Ltd	Melton Mowbray	<a href="http://www.elementsjoinery.co.uk">www.elementsjoinery.co.uk</a>	Furniture Manufacturer
Elmwood Joinery Ltd	Halstead	<a href="http://www.elmwoodjoinery.co.uk">www.elmwoodjoinery.co.uk</a>	Furniture Manufacturer
Ercol Furniture Ltd	Bucks	<a href="http://www.ercol.com">www.ercol.com</a>	Furniture Manufacturer
ERW Joinery Ltd	Middlesbrough	<a href="http://www.erwld.co.uk">www.erwld.co.uk</a>	Furniture Manufacturer
F Cuff & Sons Ltd	Sherborne	<a href="http://www.fcffandsons.co.uk">www.fcffandsons.co.uk</a>	Furniture Manufacturer
F E Jones Builders Ltd	Levenshulme	<a href="http://www.fejones.co.uk">www.fejones.co.uk</a>	Furniture Manufacturer
Fairmitre Windows & Conservatories	Oswestry	<a href="http://www.fairmitreshropshire.co.uk">www.fairmitreshropshire.co.uk</a>	Furniture Manufacturer
Farrar Joinery Manufacturers	Bradford	<a href="http://www.farrarjoinery.co.uk">www.farrarjoinery.co.uk</a>	Furniture Manufacturer
Ferndale joinery Ltd	Oldham	<a href="http://www.gerndalejoinery.co.uk">www.gerndalejoinery.co.uk</a>	Furniture Manufacturer
G&S Specialt Timber	Penrith	<a href="http://www.toolsandtimber.co.uk">www.toolsandtimber.co.uk</a>	Furniture Manufacturer
Generation Joinery Ltd	Epping	-	Furniture Manufacturer
George Collin & Sons Ltd	Newmarket	-	Furniture Manufacturer
Gerlder joinery Ltd	Oxford	<a href="http://www.gelderjoinery.co.uk">www.gelderjoinery.co.uk</a>	Furniture Manufacturer
GK Joinery Ltd	Stroud	<a href="http://www.gkjoinery.com">www.gkjoinery.com</a>	Furniture Manufacturer
Gloweth Ltd	Truro	<a href="http://www.gloweth.com">www.gloweth.com</a>	Furniture Manufacturer
Gough's Joinery	Warwick	<a href="http://www.goughsjoinery.co.uk">www.goughsjoinery.co.uk</a>	Furniture Manufacturer
Graeme Henderson (Timber) Ltd	Kirkcaldy	<a href="http://www.gh timber.co.uk">www.gh timber.co.uk</a>	Furniture Manufacturer
Granton Joinery Ltd	Wimborne	<a href="http://www.grantonjoinery.co.uk">www.grantonjoinery.co.uk</a>	Furniture Manufacturer
Greenhill Disign	Cornwall	<a href="http://www.greenhilldesign.co.uk">www.greenhilldesign.co.uk</a>	Furniture Manufacturer
H Nordstrom and Son	Hendon	<a href="http://www.nordstromtimber.co.uk">www.nordstromtimber.co.uk</a>	Furniture Manufacturer
H Sweet & Sons Ltd	Nailsea	<a href="http://www.hsweetandsons.com">www.hsweetandsons.com</a>	Furniture Manufacturer
Hare & Levitt Ltd	Skelmersdale	<a href="http://www.hareandlevitt.co.uk">www.hareandlevitt.co.uk</a>	Furniture Manufacturer
Harlequin Headboards Ltd	Northampton	<a href="http://www.harlequinheadboards.co.uk">www.harlequinheadboards.co.uk</a>	Furniture manufacturer
Heron joinery	Magherafelt	<a href="http://www.heronjoinery.com">www.heronjoinery.com</a>	Furniture Manufacturer
High Performance Windows Ltd	Walsall	<a href="http://www.highperformancewindowsltd.co.uk">www.highperformancewindowsltd.co.uk</a>	Furniture Manufacturer
Howdens Joinery	London	<a href="http://www.howdens.com">www.howdens.com</a>	Furniture Manufacturer
HW Wilson Ltd	South Ockendon	<a href="http://www.hwwilsonltd.com">www.hwwilsonltd.com</a>	Furniture Manufacturer
Image Developments Ltd	Malton	<a href="http://www.idlgroup.co.uk">www.idlgroup.co.uk</a>	Furniture Manufacturer
In-Doors Manufacturing Ltd	Toomebridge	<a href="http://www.in-doors.com">www.in-doors.com</a>	Furniture Manufacturer
Input Joinery Ltd	Andover	<a href="http://www.inputjoinery.co.uk">www.inputjoinery.co.uk</a>	Furniture Manufacturer
Institute of Carpenters	Wendover	<a href="http://www.instituteofcarpenters.com">www.instituteofcarpenters.com</a>	Furniture Manufacturer
Interfusion joinery Ltd	Wembley	<a href="http://www.interfusionuk.com">www.interfusionuk.com</a>	Furniture Manufacturer
Inwood Ltd	Rhyl	<a href="http://www.woodworkersuk.co.uk">www.woodworkersuk.co.uk</a>	Furniture Manufacturer
J&C Davies joinery	Monmouth	<a href="http://www.jandcdaviesjoinery.co.uk">www.jandcdaviesjoinery.co.uk</a>	Furniture Manufacturer
J&E Woodworks Ltd	Lampeter	<a href="http://www.je-woodworks.co.uk">www.je-woodworks.co.uk</a>	Furniture Manufacturer
Jack Fielden joiners Ltd	Halifax	<a href="http://www.jackfieldenjoiners.co.uk">www.jackfieldenjoiners.co.uk</a>	Furniture Manufacturer

Jacowe Joinery Ltd	Huntingdon	<a href="http://www.jacowejoinery.co.uk">www.jacowejoinery.co.uk</a>	Furniture Manufacturer
James Joinery UK Ltd	Watford	-	Furniture Manufacturer
JCK Joinery	Leicester	<a href="http://www.jckjoinery.co.uk">www.jckjoinery.co.uk</a>	Furniture Manufacturer
JDM Joinery Ltd	Skelmersdale	<a href="http://www.jdmltd.co.uk">www.jdmltd.co.uk</a>	Furniture Manufacturer
JH Thornley Ltd t/a Clapman Builders	High Peak	<a href="http://www.clapham-builders.co.uk">www.clapham-builders.co.uk</a>	Furniture Manufacturer
JM Joinery Ltd	Callow	<a href="http://www.jmjoinery.com">www.jmjoinery.com</a>	Furniture Manufacturer
John F. White Cabinetmakers Ltd	Nuneaton	<a href="http://www.jfw-cabinet.com">www.jfw-cabinet.com</a>	Furniture Manufacturer
John Robertson Ltd	Sudbury	<a href="http://www.johnrobertson.ltd.uk">www.johnrobertson.ltd.uk</a>	Furniture Manufacturer
John Rose Joinery Ltd	Matlock	-	Furniture Manufacturer
John Turner Construction Group Ltd	Preston	<a href="http://www.johnturner.co.uk">www.johnturner.co.uk</a>	Furniture Manufacturer
Johnson Bros Ltd	Oldham	<a href="http://www.jboldham.co.uk">www.jboldham.co.uk</a>	Furniture Manufacturer
Joinery Northwest Ltd	Kendal	<a href="http://www.joinerynorthwest.co.uk">www.joinerynorthwest.co.uk</a>	Furniture Manufacturer
JT Ward Joinery Ltd	Holbeach	<a href="http://www.jtwardjoinery.co.uk">www.jtwardjoinery.co.uk</a>	Furniture Manufacturer
Jubilee Joinery Ltd	Fareham	-	Furniture Manufacturer
K&D joinery	Dagenham	<a href="http://www.kandd.org">www.kandd.org</a>	Furniture Manufacturer
Kelvin Bedroom Systems Ltd	Orchardton	<a href="http://www.kelvinkbb.com">www.kelvinkbb.com</a>	Furniture Manufacturer
Kenelm Joinery	Cheltenham	<a href="http://www.kenelmjoinery.co.uk">www.kenelmjoinery.co.uk</a>	Furniture Manufacturer
Kevin Ostler Carpentry and Joinery	Market Harborough	-	Furniture Manufacturer
Kierson Sash Window & Timber Restoration	Retford	<a href="http://www.kierson.co.uk">www.kierson.co.uk</a>	Furniture Manufacturer
Kings Cliffe Joinery Ltd	Kingscliffe	-	Furniture Manufacturer
Kingstown Furniture Ltd	Hull	<a href="http://www.kingstown.co.uk">www.kingstown.co.uk</a>	Furniture Manufacturer
Kirby Joinery Ltd	York	<a href="http://www.kirbyjoinery.co.uk">www.kirbyjoinery.co.uk</a>	Furniture Manufacturer
KP Joinery	Pulborough	<a href="http://www.kpjoinery.co.uk">www.kpjoinery.co.uk</a>	Furniture Manufacturer
L&S Doors Ltd	Barnsley	<a href="http://www.landscontracting.co.uk">www.landscontracting.co.uk</a>	Furniture Manufacturer
Laverack Joinery Ltd	York	<a href="http://www.laverackjoinery.co.uk">www.laverackjoinery.co.uk</a>	Furniture Manufacturer
Law & Lewis of Cambridge Ltd	Cambridge	<a href="http://www.lawandlewis.co.uk">www.lawandlewis.co.uk</a>	Furniture Manufacturer
Leamington Timber Window and Joinery	Ashorne	<a href="http://www.leamingtontimberwindows.co.uk">www.leamingtontimberwindows.co.uk</a>	Furniture Manufacturer
Leeds Plywood & Doors Ltd	Leeds	<a href="http://www.lpddoors.co.uk">www.lpddoors.co.uk</a>	Furniture Manufacturer
Leitz Tooling UK Ltd	Harlow	<a href="http://www.shopuk.leitz.org">www.shopuk.leitz.org</a>	Furniture Manufacturer
Lewis Aldridge Joinery Ltd	Walsall	<a href="http://www.lewisaldridgejoinery.co.uk">www.lewisaldridgejoinery.co.uk</a>	Furniture Manufacturer
Lloyd Woodworking Ltd	Brackley	<a href="http://www.lloydwoodworking.co.uk">www.lloydwoodworking.co.uk</a>	Furniture Manufacturer
Lockinge Estate Joinery	East lockinge	<a href="http://www.lockinge-estate.co.uk">www.lockinge-estate.co.uk</a>	Furniture Manufacturer
Lodge Joinery Ltd	BRistol	<a href="http://www.lodgejoinerybristoltd.co.uk">www.lodgejoinerybristoltd.co.uk</a>	Furniture Manufacturer
Loxwood Window Co Ltd	Cheltenham	<a href="http://www.loxwoodwindows.com">www.loxwoodwindows.com</a>	Furniture Manufacturer
LW Wedd & Son Ltd	Cambridge	<a href="http://www.weddjoinery.com">www.weddjoinery.com</a>	Furniture Manufacturer
M Rome Joinery Ltd	Sadonsbury	<a href="http://www.mromejoinery.co.uk">www.mromejoinery.co.uk</a>	Furniture Manufacturer
Mablethorpe Joinery Services	Mablethorpe	-	Furniture Manufacturer
Maddock Joinery Manufacture	Montrose	<a href="http://www.maddockjoinerymanufacture.co.uk">www.maddockjoinerymanufacture.co.uk</a>	Furniture Manufacturer
Marlin Joinery Ltd	Bournemouth	<a href="http://www.marlin-joinery.co.uk">www.marlin-joinery.co.uk</a>	Furniture Manufacturer
Masson Joinery Ltd	Tunbridge Wells	<a href="http://www.massonjoinery.co.uk">www.massonjoinery.co.uk</a>	Furniture Manufacturer
Matthew McCrossan Bespoke Furniture and Storage	Newcastle	<a href="http://www.matthewmccrossan.co.uk">www.matthewmccrossan.co.uk</a>	Furniture Manufacturer
MCM Joinery Solutions Ltd	Wickford	<a href="http://www.mcmjoinery.com">www.mcmjoinery.com</a>	Furniture Manufacturer
Medina Joinery Ltd	Hayling Island	<a href="http://www.medinajoinery.co.uk">www.medinajoinery.co.uk</a>	Furniture Manufacturer

Michael Pepper joinery Ltd	Derby	<a href="http://www.joineryservicesderby.co.uk">www.joineryservicesderby.co.uk</a>	Furniture Manufacturer
Midland Conservations Ltd	Cannock	<a href="http://www.midlandconservatories.com">www.midlandconservatories.com</a>	Furniture Manufacturer
Midland Mouldings Ltd	Walsall	<a href="http://www.midlandmouldings.co.uk">www.midlandmouldings.co.uk</a>	Furniture Manufacturer
Mill Hill Interiors Ltd	Marston Trussel	-	Furniture Manufacturer
Mills & Scott	Burnley	<a href="http://www.millsandscott.co.uk">www.millsandscott.co.uk</a>	Furniture Manufacturer
MJ Ferguson Ltd	Billericay	<a href="http://www.mjferguson.co.uk">www.mjferguson.co.uk</a>	Furniture Manufacturer
Moods Fine Furniture Co	Enniskillen	-	Furniture Manufacturer
Morikenzie Joinery	Taynuilt	<a href="http://www.morikenzie.com">www.morikenzie.com</a>	Furniture Manufacturer
Morris & Company Ltd	Shrewsbury	<a href="http://www.morris-joinery.co.uk">www.morris-joinery.co.uk</a>	Furniture Manufacturer
Mounts Hill Woodcraft and Design Ltd	Cranbrook	<a href="http://www.mountshill.com">www.mountshill.com</a>	Furniture Manufacturer
N Stephenson & Son Ltd	Kettering	<a href="http://www.joinerykettering.com">www.joinerykettering.com</a>	Furniture Manufacturer
Neville joinery Ltd	Luton	<a href="http://www.nevillejoinery.co.uk">www.nevillejoinery.co.uk</a>	Furniture Manufacturer
Nicholls joinery Ltd	Kettering	<a href="http://www.nichollsjoinery.co.uk">www.nichollsjoinery.co.uk</a>	Furniture Manufacturer
Norton Joinery Ltd	Malton	<a href="http://www.nortonjoinery.co.uk">www.nortonjoinery.co.uk</a>	Furniture Manufacturer
Oakleaf Commercial services Ltd	Kidderminster	<a href="http://www.oakleafcs.com">www.oakleafcs.com</a>	Furniture Manufacturer
Oakwrights Bath Ltd	Corsham	<a href="http://www.oakwrightsbath.co.uk">www.oakwrightsbath.co.uk</a>	Furniture Manufacturer
Oram Joinery Ltd	Kirdford	<a href="http://www.oramjoinerysussex.co.uk">www.oramjoinerysussex.co.uk</a>	Furniture Manufacturer
Original Windows Ltd	Enfield	<a href="http://www.originalwindows.co.uk">www.originalwindows.co.uk</a>	Furniture Manufacturer
Original Wooden Windows Ltd	South Iver	-	Furniture Manufacturer
P&L Joinery Ltd	Stoke-on-Trent	<a href="http://www.p-ljoinery.co.uk">www.p-ljoinery.co.uk</a>	Furniture Manufacturer
Palling joiners Ltd	Hull	<a href="http://www.palingjoiners.co.uk">www.palingjoiners.co.uk</a>	Furniture Manufacturer
PAP Barford Joinery	Bourne	-	Furniture Manufacturer
Park Way Joinery Ltd	Ryde	<a href="http://www.parkwayjoineryisleofwight.co.uk">www.parkwayjoineryisleofwight.co.uk</a>	Furniture Manufacturer
Parkwood Arts Ltd	Petersfield	<a href="http://www.parkwood-arts.co.uk">www.parkwood-arts.co.uk</a>	Furniture Manufacturer
Parsons Group Joinery	Sheffield	<a href="http://www.parsonsgroupjoinery.co.uk">www.parsonsgroupjoinery.co.uk</a>	Furniture Manufacturer
Parsons Joinery Ltd	Ringmer	<a href="http://www.parsonsjoinery.com">www.parsonsjoinery.com</a>	Furniture Manufacturer
Partridge Joinery	Fonthill Gifford	-	Furniture Manufacturer
Paul Renshaw Joinery Ltd	Liverpool	<a href="http://www.renshawjoinery.co.uk">www.renshawjoinery.co.uk</a>	Furniture Manufacturer
Performance Doorset Solutions	Littlesborough	<a href="http://www.pdsdoorsets.co.uk">www.pdsdoorsets.co.uk</a>	Furniture Manufacturer
Period Joinery Ltd	Melmerby	<a href="http://www.period-joinery.co.uk">www.period-joinery.co.uk</a>	Furniture Manufacturer
Phase One Joinery	Tunbridge Wells	<a href="http://www.phaseonejoinery.co.uk">www.phaseonejoinery.co.uk</a>	Furniture Manufacturer
Phillips Joinery Ltd	Ashbourne	<a href="http://www.phillipsjoinery.co.uk">www.phillipsjoinery.co.uk</a>	Furniture Manufacturer
Pike Joinery	Bridgewater	<a href="http://www.pikejoinery.co.uk">www.pikejoinery.co.uk</a>	Furniture Manufacturer
Piper Joinery	Ashford	<a href="http://www.piperjoinery.co.uk">www.piperjoinery.co.uk</a>	Furniture Manufacturer
Planet Woodworking	Cricklade	<a href="http://www.planetwoodworking.co.uk">www.planetwoodworking.co.uk</a>	Furniture Manufacturer
Plymouth Community homes Manufacturing Services	Cattedown	<a href="http://www.pchmanufacturing.co.uk">www.pchmanufacturing.co.uk</a>	Furniture Manufacturer
Precision Carpentry & Joinery	Haverhill	-	Furniture Manufacturer
Pronto Joinery Ltd	Norwich	<a href="http://www.prontojoinery.co.uk">www.prontojoinery.co.uk</a>	Furniture Manufacturer
Prowood joinery Ltd	Sheffield	<a href="http://www.prowoodjoinery.co.uk">www.prowoodjoinery.co.uk</a>	Furniture Manufacturer
Quad Joinery Ltd	Colwick	-	Furniture Manufacturer
Qwood	Oldham	<a href="http://www.qwood.co.uk">www.qwood.co.uk</a>	Furniture Manufacturer
R. J. & M. T. Usher	Swansea	-	Furniture Manufacturer
Rawlings Joinery	Plymouth	<a href="http://www.rawlingsjoinery.co.uk">www.rawlingsjoinery.co.uk</a>	Furniture Manufacturer
Ray Delbridge Ltd	Minehead	<a href="http://www.delbridges.co.uk">www.delbridges.co.uk</a>	Furniture Manufacturer

RDF Building Services Ltd	Leeds	<a href="http://www.rdfbuildings.com">www.rdfbuildings.com</a>	Furniture Manufacturer
Redrock Joinery	Maidstone	<a href="http://www.redrockjoinery.co.uk">www.redrockjoinery.co.uk</a>	Furniture Manufacturer
Redwood Joinery Ltd	Bridgewater	<a href="http://www.redwoodjoinery.co.uk">www.redwoodjoinery.co.uk</a>	Furniture Manufacturer
RF Slight Joinery Ltd	Tranent	<a href="http://www.rfslight.co.uk">www.rfslight.co.uk</a>	Furniture Manufacturer
Richard James Joinery Ltd	Hexham	<a href="http://www.richardjamesjoinery.co.uk">www.richardjamesjoinery.co.uk</a>	Furniture Manufacturer
Riverside Building Supplies Ltd	Heybridge	-	Furniture Manufacturer
RJM Todmorden Ltd	Todmorden	<a href="http://www.todmordenjoinery.co.uk">www.todmordenjoinery.co.uk</a>	Furniture Manufacturer
RJR	Stourport-on-Severn	<a href="http://www.rjrjoinery.com">www.rjrjoinery.com</a>	Furniture Manufacturer
RM Jones Joinery Ltd	Ruthin	<a href="http://www.rmjonesjoinery.com">www.rmjonesjoinery.com</a>	Furniture Manufacturer
RMJM Joinery Ltd	Bilston	<a href="http://www.rmjmjoinery.co.uk">www.rmjmjoinery.co.uk</a>	Furniture Manufacturer
Rochford Joinery Ltd	London	-	Furniture Manufacturer
Rock Joinery	Waterbridge	<a href="http://www.rockjoinery.co.uk">www.rockjoinery.co.uk</a>	Furniture Manufacturer
Rolfe Joinery Co Ltd	Kings Lynn	-	Furniture Manufacturer
Romsey Glass & joinery Ltd	Romsey	<a href="http://www.romseyjoinery.com">www.romseyjoinery.com</a>	Furniture Manufacturer
Rosecastle joinery	Haverfordwest	-	Furniture Manufacturer
Rosevear Ltd	Cornwall	<a href="http://www.rosevears.co.uk">www.rosevears.co.uk</a>	Furniture Manufacturer
Rowan Timber	Airdrie	<a href="http://www.rowan-timber.co.uk">www.rowan-timber.co.uk</a>	Furniture Manufacturer
RTS Joinery & Shopfitting Ltd	Thornaby-on-Trees	<a href="http://www.rtsshopfitting.co.uk">www.rtsshopfitting.co.uk</a>	Furniture Manufacturer
Rudd joinery	Pembroke Dock	<a href="http://www.ruddjoinery.com">www.ruddjoinery.com</a>	Furniture Manufacturer
Rudd Joinery Ltd	Fakenham	<a href="http://www.ruddjoinery.co.uk">www.ruddjoinery.co.uk</a>	Furniture Manufacturer
RW Armstrong & Sons Ltd	Basingstoke	-	Furniture Manufacturer
S Taylor & Son Ltd	Pickering	<a href="http://www.stsjoinery.co.uk">www.stsjoinery.co.uk</a>	Furniture Manufacturer
Sayerwood Joinery	Norwich	<a href="http://www.sayerwood.com">www.sayerwood.com</a>	Furniture Manufacturer
Scandia Ltd	Norwich	<a href="http://www.scandia.uk.net">www.scandia.uk.net</a>	Furniture Manufacturer
Scotts of Thrapston	Thrapston	<a href="http://www.scottsofthrapston.co.uk">www.scottsofthrapston.co.uk</a>	Furniture Manufacturer
Scottwood of Nottingham	Nottingham	<a href="http://www.scottwood.co.uk">www.scottwood.co.uk</a>	Furniture Manufacturer
Sepecialist Joinery Ltd	Ringmer	<a href="http://www.specialistjoinery-south.co.uk">www.specialistjoinery-south.co.uk</a>	Furniture Manufacturer
Seth Evans joinery Ltd	Worthing	<a href="http://www.sethevensjoinery.com">www.sethevensjoinery.com</a>	Furniture Manufacturer
Shakespeare Joinery Ltd	Warboys	<a href="http://www.shakespearejoinery.com">www.shakespearejoinery.com</a>	Furniture Manufacturer
Sharpe Services	Weymouth	<a href="http://www.sharpeservices.net">www.sharpeservices.net</a>	Furniture Manufacturer
Shaws Bespoke Joinery LLP	Coventry	<a href="http://www.shawsjoinery.co.uk">www.shawsjoinery.co.uk</a>	Furniture Manufacturer
Sherlock & Neal Ltd	Rusper	<a href="http://www.sherlockneal.co.uk">www.sherlockneal.co.uk</a>	Furniture Manufacturer
Sims Joinery Ltd	Monmouth	-	Furniture Manufacturer
Siscon Ltd	Cublington	<a href="http://www.siscon.co.uk">www.siscon.co.uk</a>	Furniture Manufacturer
Slenderglase Ltd	Bath	<a href="http://www.sashconsultancy.co.uk">www.sashconsultancy.co.uk</a>	Furniture Manufacturer
SM joinery & Carpentry Ltd	London	<a href="http://www.smjoineryandcarpentry.co.uk">www.smjoineryandcarpentry.co.uk</a>	Furniture Manufacturer
Smallbone & Co (Devizes) Ltd	Wiltshire	<a href="http://www.smallbone.co.uk">www.smallbone.co.uk</a>	Furniture Manufacturer
Smith & Choyce Ltd	Gloucester	-	Furniture Manufacturer
Solutions in Wood Ltd	Portsmouth	<a href="http://www.solutionsinwood.co.uk">www.solutionsinwood.co.uk</a>	Furniture Manufacturer
Somer Joinery	Midsomer Norton	<a href="http://www.somer-joinery.co.uk">www.somer-joinery.co.uk</a>	Furniture Manufacturer
Somerton Joinery Ltd	Somerton	-	Furniture Manufacturer
Soper Goupp	Hull	<a href="http://www.sopergroup.co.uk">www.sopergroup.co.uk</a>	Furniture Manufacturer
Spitfire Joinery	Southampton	<a href="http://www.tewbros.com">www.tewbros.com</a>	Furniture Manufacturer
SPN Joinery Ltd	Preston	<a href="http://www.spn-joinery.co.uk">www.spn-joinery.co.uk</a>	Furniture Manufacturer



SPS Timber Windows	Mitcham	<a href="http://www.spstimmerwindows.co.uk">www.spstimmerwindows.co.uk</a>	Furniture Manufacturer
Stanbrook & Nicholson Ltd	West Molesey	<a href="http://www.stanbrookandnicholson.co.uk">www.stanbrookandnicholson.co.uk</a>	Furniture Manufacturer
Stapleton Joinery	Silsden	-	Furniture Manufacturer
Stephon Davies Joinery	Hatfield	<a href="http://www.sdjoinery.co.uk">www.sdjoinery.co.uk</a>	Furniture Manufacturer
Steven Thomas Joinery Ltd	Ceredigion	-	Furniture Manufacturer
Strasdin Joinery Ltd	Llanelli	<a href="http://www.strasdinjoinery.co.uk">www.strasdinjoinery.co.uk</a>	Furniture Manufacturer
Strouden Interiors Ltd	Poole	<a href="http://www.stroudenjoinery.co.uk">www.stroudenjoinery.co.uk</a>	Furniture Manufacturer
T and F joinery Ltd	Ludham	<a href="http://www.tandfjoinery.co.uk">www.tandfjoinery.co.uk</a>	Furniture Manufacturer
T&J Carpentry & joinery Ltd	Cirencester	<a href="http://www.tjjoineryltd.co.uk">www.tjjoineryltd.co.uk</a>	Furniture Manufacturer
TA Windows	Stoke-on-Trent	<a href="http://www.tawindows.com">www.tawindows.com</a>	Furniture Manufacturer
Tate joinery Ltd	Rayleigh	<a href="http://www.tatejoinery.com">www.tatejoinery.com</a>	Furniture Manufacturer
Taylos timber centre	Bradford	<a href="http://www.taylortimber.co.uk">www.taylortimber.co.uk</a>	Furniture Manufacturer
TD joinery Ltd	Ringshall	<a href="http://www.tdjoinery.com">www.tdjoinery.com</a>	Furniture Manufacturer
The Grain Joinery	Eridge Green	<a href="http://www.thegrainjoinery.co.uk">www.thegrainjoinery.co.uk</a>	Furniture Manufacturer
The joinery Shop	Kendal	<a href="http://www.thejoineryshop.co.uk">www.thejoineryshop.co.uk</a>	Furniture Manufacturer
The Joinery Workshop	Orpington	<a href="http://www.bryen-langley.co.uk">www.bryen-langley.co.uk</a>	Furniture Manufacturer
The Oakworkshop Ltd	Adwick-le-Street	<a href="http://www.theoakworkshop.com">www.theoakworkshop.com</a>	Furniture Manufacturer
The Sash Window Workshop Trading	Bracknell	<a href="http://www.sashwindow.com">www.sashwindow.com</a>	Furniture Manufacturer
The Wonder of Wood Ltd	Settle	<a href="http://www.wonderofwoodltd.co.uk">www.wonderofwoodltd.co.uk</a>	Furniture Manufacturer
Theaker Joinery Ltd	Scunthorpe	<a href="http://www.theakerjoinery.com">www.theakerjoinery.com</a>	Furniture Manufacturer
Thomas Armstrong Ltd	Maryport	-	Furniture Manufacturer
Thomas Joinery Ltd	Crymych	<a href="http://www.thomasjoinery.co.uk">www.thomasjoinery.co.uk</a>	Furniture Manufacturer
Timberdeal	Burges Hill	<a href="http://www.timberdeal.co.uk">www.timberdeal.co.uk</a>	Furniture Manufacturer
Timberplus	Penzance	<a href="http://www.timberplus.co.uk">www.timberplus.co.uk</a>	Furniture Manufacturer
Timberworks Wales	Cymmer	<a href="http://www.timberworkswales.co.uk">www.timberworkswales.co.uk</a>	Furniture Manufacturer
TJB Joinery	Kidderminster	-	Furniture Manufacturer
TK Joinery Ltd	Blandford Forum	-	Furniture Manufacturer
TMA Construction Ltd	London	-	Furniture Manufacturer
Tompkins Ltd	Daventry	<a href="http://www.tomkpinsjoinery.co.uk">www.tomkpinsjoinery.co.uk</a>	Furniture Manufacturer
Top Notch joinery Ltd	Newquay	<a href="http://www.topnotchjoinery.com">www.topnotchjoinery.com</a>	Furniture Manufacturer
Towers & keightley Ltd	Melton Mowbray	<a href="http://www.towersandkeightley.co.uk">www.towersandkeightley.co.uk</a>	Furniture Manufacturer
Traditional Joiners & Carpenters Ltd	Cleethorpes	-	Furniture Manufacturer
Treecraft woodwork Ltd	Dornoch	<a href="http://www.treecraft-woodwork.com">www.treecraft-woodwork.com</a>	Furniture Manufacturer
Tremletts Carpentry and Joinery	Haywards Heath	<a href="http://www.tremletts-carpentry-joinery.com">www.tremletts-carpentry-joinery.com</a>	Furniture Manufacturer
Tudor Oak (Kent) Ltd	Maidstone	<a href="http://www.tudor-oak.co.uk">www.tudor-oak.co.uk</a>	Furniture Manufacturer
Two Twenty Ltd	Foston	<a href="http://www.twotwenty.co.uk">www.twotwenty.co.uk</a>	Furniture Manufacturer
Uniserv enterprises Ltd	Bexleyheath	<a href="http://www.uniserv.co.uk">www.uniserv.co.uk</a>	Furniture Manufacturer
Valley of Bath Ltd	Woodborough	<a href="http://www.valleyofbath.co.uk">www.valleyofbath.co.uk</a>	Furniture Manufacturer
Ventrolla	Harrogate	<a href="http://www.ventrolla.co.uk">www.ventrolla.co.uk</a>	Furniture Manufacturer
Vernon Morgan Joinery	Penffordd	-	Furniture Manufacturer
Vickers Joinery Ltd	Leeds	<a href="http://www.vickersjoinery.co.uk">www.vickersjoinery.co.uk</a>	Furniture Manufacturer
Weldon	Norwell	<a href="http://www.weldon.co.uk">www.weldon.co.uk</a>	Furniture Manufacturer
West Joinery	Watford	<a href="http://www.westjoineryltd.co.uk">www.westjoineryltd.co.uk</a>	Furniture Manufacturer
West Oak Joinery Ltd	Letchworth	<a href="http://www.westoakjoinery.com">www.westoakjoinery.com</a>	Furniture Manufacturer

WH&J Henshaw Ltd	Stalbridge	<a href="http://www.henshawjoinery.co.uk">www.henshawjoinery.co.uk</a>	Furniture Manufacturer
Whitecat Joinery	London	<a href="http://www.whitecatjoinery.co.uk">www.whitecatjoinery.co.uk</a>	Furniture Manufacturer
Wolbridge Ltd	Bilston	<a href="http://www.wolbridge.co.uk">www.wolbridge.co.uk</a>	Furniture Manufacturer
Wood & Wisdom Ltd	Balcombe	<a href="http://www.woodandwisdom.co.uk">www.woodandwisdom.co.uk</a>	Furniture Manufacturer
Woodbase Joiners Ltd	Westfield	<a href="http://www.woodbasejoiners.co.uk">www.woodbasejoiners.co.uk</a>	Furniture Manufacturer
Woodberry Bros. & Haines Ltd	Highbridge	-	Furniture Manufacturer
Woodcraft joinery Ltd	Redruth	-	Furniture Manufacturer
Woodside Designs NW Ltd	Blackpool	<a href="http://www.woodsidedesigns.co.uk">www.woodsidedesigns.co.uk</a>	Furniture Manufacturer
Woodside Ridell Ltd	Bracknell	<a href="http://www.woodsideridell.co.uk">www.woodsideridell.co.uk</a>	Furniture Manufacturer
Woodstock	Falmouth	<a href="http://www.wood-stock.co.uk">www.wood-stock.co.uk</a>	Furniture Manufacturer
Wychwood design	Oxon	<a href="http://www.wychwood-design.co.uk">www.wychwood-design.co.uk</a>	Furniture Manufacturer
Wyre Forest Woodcraft	Kidderminster	<a href="http://www.wyreforestwoodcraft.co.uk">www.wyreforestwoodcraft.co.uk</a>	Furniture Manufacturer
Y&S Joinery Ltd	Harrow	<a href="http://www.jsjoinery.com">www.jsjoinery.com</a>	Furniture Manufacturer
Yoxall Joinery Ltd	Northwich	<a href="http://www.yoxalljoinery.co.uk">www.yoxalljoinery.co.uk</a>	Furniture Manufacturer
Zulufish Ltd	London	<a href="http://www.zulufish.co.uk">www.zulufish.co.uk</a>	Furniture Manufacturer
Baggeridge Joinery Limited	Kingswinford	-	Furniture Manufacturer
A Hingley and Sons Timber	Belper	<a href="http://www.hingleytimber.co.uk">www.hingleytimber.co.uk</a>	Hardwood Sawmill
Aitken & Howard LTD	Alexandria	<a href="http://www.aitkenhoward.co.uk/contact/">www.aitkenhoward.co.uk/contact/</a>	Hardwood Sawmill
Cilfegan Sawmill	Usk	<a href="http://www.cilfegansawmill.co.uk">www.cilfegansawmill.co.uk</a>	Hardwood Sawmill
East Bros (Timber) Ltd	Salisbury	<a href="http://www.eastbros.co.uk">www.eastbros.co.uk</a>	Hardwood Sawmill
Pontrilas Sawmills	Hereford	<a href="http://pontrilassawmills.co.uk">pontrilassawmills.co.uk</a>	Hardwood Sawmill
AC Timber	Ely	<a href="http://www.actimber.co.uk">www.actimber.co.uk</a>	Hardwood timber trade
Anthony Axford Ltd	Bolton	<a href="http://www.anthonyaxford.co.uk">www.anthonyaxford.co.uk</a>	Hardwood timber trade
British Hardwoods	Keighley	<a href="http://www.britishhardwoods.co.uk">www.britishhardwoods.co.uk</a>	Hardwood timber trade
Celtic Timber	Haverfordwest	<a href="http://www.celtictimber.co.uk">www.celtictimber.co.uk</a>	Hardwood timber trader
Tradewood Agencies	Belfast	<a href="http://www.tradewood.co.uk">www.tradewood.co.uk</a>	imports timber trader
Abbey Woods	Baldoyle	<a href="http://www.abbeywoods.ie">www.abbeywoods.ie</a>	Imports/Timber trader
Adhctic Ltd	Oxford	<a href="http://www.adhctic.co.uk">www.adhctic.co.uk</a>	Imports/Timber trader
Afriktimber Ltd	Dagenham	<a href="http://www.afriktimber.com">www.afriktimber.com</a>	Imports/Timber trader
Andrews Timber & Plywood Ltd	Billericay	-	Imports/Timber trader
Banza & Sons Timber UK Ltd	Feltham	<a href="http://www.banzatimber.com">www.banzatimber.com</a>	Imports/Timber trader
Barnswell Timber Ltd	Grantham	<a href="http://www.barnswelltimber.co.uk">www.barnswelltimber.co.uk</a>	Imports/Timber trader
Beesley & Fildes Ltd	Liverpool	<a href="http://www.beesleyandfildes.co.uk">www.beesleyandfildes.co.uk</a>	Imports/Timber trader
Blumsom Timber Centre	Barking	<a href="http://www.blumsomtimbercentre.com">www.blumsomtimbercentre.com</a>	Imports/Timber trader
Border Hardwood Ltd	Shrewsbury	<a href="http://www.borderhardwood.com">www.borderhardwood.com</a>	Imports/Timber trader
Brooks Bros Ltd	Maldon	<a href="http://www.brookstimber.co.uk">www.brookstimber.co.uk</a>	Imports/Timber trader
Brooks Bros Ltd	Maldon	<a href="http://www.brookstimber.co.uk">www.brookstimber.co.uk</a>	Imports/Timber trader
Brooks Group :td	Dublen	<a href="http://www.brooksgroup.ie">www.brooksgroup.ie</a>	Imports/Timber trader
Clarks Wood Co Ltd	Newport	<a href="http://www.clarkswood.com">www.clarkswood.com</a>	Imports/Timber trader
Coventry Timber Products Ltd	Coventry	<a href="http://www.coventrytimber.co.uk">www.coventrytimber.co.uk</a>	Imports/Timber trader
CP Timber Ltd	Hertford	<a href="http://www.cptimber.com">www.cptimber.com</a>	Imports/Timber trader
Cusato Timber Ltd	Holywell	-	Imports/Timber trader
Danzer	Maldon	<a href="http://www.danzer.co.uk">www.danzer.co.uk</a>	Imports/Timber trader
Devon Hardwoods	Dotton,	<a href="http://www.devonhardwoods.co.uk">www.devonhardwoods.co.uk</a>	Imports/Timber trader

Dinan Timber Products Ltd	Thurles	<a href="http://www.dinantimber.ie">www.dinantimber.ie</a>	Imports/Timber trader
Duffield Timber	Ripon	<a href="http://www.duffieldtimber.com">www.duffieldtimber.com</a>	Imports/Timber trader
Durga Timber Europe Ltd	Wembley	<a href="http://www.durga-timber.co.uk">www.durga-timber.co.uk</a>	Imports/Timber trader
E C Forest Products Ltd	Whitesmiths	<a href="http://www.ecforestproducts.co.uk">www.ecforestproducts.co.uk</a>	Imports/Timber trader
E. O. Burton & Co Ltd	Brentwood	<a href="http://www.eoburton.com/index.html">http://www.eoburton.com/index.html</a>	Imports/Timber trader
E. W. Tinegate Ltd	Birmingham	-	Imports/Timber trader
Eastern Hardwoods Ltd	Harlow	<a href="http://www.easternhardwoods.co.uk">www.easternhardwoods.co.uk</a>	Imports/Timber trader
Eaton Timber Solutions LTD	Shropshire	<a href="http://www.eatontimber.co.uk/">www.eatontimber.co.uk/</a>	Imports/Timber trader
Eddie Smith Timber (Long Lenth Timber)	Shotley	<a href="http://www.longlengthtimber.com">www.longlengthtimber.com</a>	Imports/Timber trader
Ellpro Timber Ltd	Ipswich	<a href="http://www.ellprotimber.co.uk">www.ellprotimber.co.uk</a>	Imports/Timber trader
Empress Timber	Chorley	<a href="http://www.empresstimber.co.uk">www.empresstimber.co.uk</a>	Imports/Timber trader
English Oak Buildings Ltd	Bath	<a href="http://www.englishoakbuildings.com/contact-us">www.englishoakbuildings.com/contact-us</a>	Imports/Timber trader
FH Bleasdale Ltd	Chorley	-	Imports/Timber trader
Forestrall Timber and Fencing Merchants	Dartford	<a href="http://www.forestrall.co.uk">www.forestrall.co.uk</a>	Imports/Timber trader
Glenmere Timber Company Limited	Market Harborough	<a href="http://www.glenmere-timber.co.uk">www.glenmere-timber.co.uk</a>	Imports/Timber trader
Goodmans Timber	Stanmore	-	Imports/Timber trader
Hewins Timber	South Petherton	<a href="http://www.hewinsoak.com">www.hewinsoak.com</a>	Imports/Timber trader
HJS (hardwood & Joinery Softwoods	Marlow Bottom	<a href="http://www.hjshardwoods.co.uk">www.hjshardwoods.co.uk</a>	Imports/Timber trader
Horndon Timber Products	Orsett	<a href="http://www.horndontimberproducts.co.uk">www.horndontimberproducts.co.uk</a>	Imports/Timber trader
Horners Timber	Keyingham	<a href="http://www.hornerstimber.co.uk">www.hornerstimber.co.uk</a>	Imports/Timber trader
Hymor Timber Ltd	Stoke on Trent	<a href="http://www.hymortimber.co.uk">www.hymortimber.co.uk</a>	Imports/Timber trader
IJK Timber Group Ltd	Belfast	<a href="http://www.ijktimber.co.uk">www.ijktimber.co.uk</a>	Imports/Timber trader
Ingham Illingworth Ltd	Manchester	<a href="http://www.iitimber.com">www.iitimber.com</a>	Imports/Timber trader
International Timber	Manchester	<a href="http://www.internationaltimber.com">www.internationaltimber.com</a>	Imports/Timber trader
J. F. Goodwillie Ltd	Waterlooville	<a href="http://www.goodwillies.co.uk">www.goodwillies.co.uk</a>	Imports/Timber trader
J. Scadding & Son Ltd	Bristol	<a href="http://www.scadding-son-ltd.co.uk">www.scadding-son-ltd.co.uk</a>	Imports/Timber trader
James McGregor & Sons Ltd	Belfast	<a href="http://www.mcgregorhardwood.com">www.mcgregorhardwood.com</a>	Imports/Timber trader
Juha Co UK Ltd	East Grinstead	<a href="http://www.juha.co.uk">www.juha.co.uk</a>	Imports/Timber trader
JW Timber Ltd	Tonbridge	<a href="http://www.jwtimber.co.uk">www.jwtimber.co.uk</a>	Imports/Timber trader
Kelvin Timber Ltd	Glasgow	<a href="http://www.kelvintimber.co.uk">www.kelvintimber.co.uk</a>	Imports/Timber trader
McMahons	Limerick	<a href="http://www.mcmahons.ie">www.mcmahons.ie</a>	Imports/Timber trader
Meerdink Ltd	Horncastle	<a href="http://www.meerdink.co.uk">www.meerdink.co.uk</a>	Imports/Timber trader
Morgan Timber	Rochester	<a href="http://www.morgantimber.co.uk/">http://www.morgantimber.co.uk/</a>	Imports/Timber trader
Moss & Co Ltd	London	<a href="http://www.mosstimber.co.uk">www.mosstimber.co.uk</a>	Imports/Timber trader
NHG Timber	South Croydon	<a href="http://www.nhgtimber.co.uk">www.nhgtimber.co.uk</a>	Imports/Timber trader
Niche Timbers Ltd	Wakefield	<a href="http://www.nichetimbers.co.uk">www.nichetimbers.co.uk</a>	Imports/Timber trader
Nicks Timber Co Ltd	Gloucester	<a href="http://www.nickstimber.co.uk">www.nickstimber.co.uk</a>	Imports/Timber trader
Oscar Windebank & Son Ltd	Corsham	<a href="http://www.oscarwindebank.co.uk">www.oscarwindebank.co.uk</a>	Imports/Timber trader
Palmer Timber Ltd	Cradley Heath	<a href="http://www.palmertimber.com">www.palmertimber.com</a>	Imports/Timber trader
Parker Kislingbury	Brill	<a href="http://www.pk-brill.co.uk">www.pk-brill.co.uk</a>	Imports/Timber trader
Paterson Timber Ltd	Glasgow	<a href="http://www.paterson-timber.com">www.paterson-timber.com</a>	Imports/Timber trader
Pendle Hardwoods	Manchester	<a href="http://www.hardwooddimensions.ltd.uk">www.hardwooddimensions.ltd.uk</a>	Imports/Timber trader
Premier Forest Products	Newport	<a href="http://www.premierforest.co.uk">www.premierforest.co.uk</a>	Imports/Timber trader
Quinn Hardwoods	Naas Road	<a href="http://www.thetimberyard.ie">www.thetimberyard.ie</a>	Imports/Timber trader

R. T. D. Crawford Ltd	Enniskillen	<a href="http://www.rtdcrawford.com">www.rtdcrawford.com</a>	Imports/Timber trader
Ramsay Timber	Wigan Appley Bridge	<a href="http://www.ramsaytimber.co.uk">www.ramsaytimber.co.uk</a>	Imports/Timber trader
Rembrand Timber Ltd	By. Dundee	<a href="http://www.rembrandtimber.com">www.rembrandtimber.com</a>	Imports/Timber trader
RH Wilson Ltd	Kirkby Stephen	<a href="http://www.rhwilsonlakes.co.uk">www.rhwilsonlakes.co.uk</a>	Imports/Timber trader
Richard Potter timber Merchants	Nantwich	<a href="http://www.fortimber.demon.co.uk">www.fortimber.demon.co.uk</a>	Imports/Timber trader
Robert Duncan (Timber) Ltd	Gateshead	<a href="http://www.robertduncan.co.uk">www.robertduncan.co.uk</a>	Imports/Timber trader
Rowan Timber Supplies (Scotland) Ltd	Plains	<a href="http://www.rowan-timber.co.uk">www.rowan-timber.co.uk</a>	Imports/Timber trader
Ruhlenhall	Guildford	<a href="http://www.ruhlenhall.com">www.ruhlenhall.com</a>	Imports/Timber trader
SH Somerscales Ltd	Keelby	<a href="http://www.stuartsomerscales.com">www.stuartsomerscales.com</a>	Imports/Timber trader
Smith Bros Timber Ltd	Lowestoft	<a href="http://www.smiths-timber.co.uk">www.smiths-timber.co.uk</a>	Imports/Timber trader
Sneek Timber	Colchester	<a href="http://www.sneektimber.co.uk">www.sneektimber.co.uk</a>	Imports/Timber trader
Southgate Timber Co Ltd	Moreton	<a href="http://www.southgatetimber.co.uk">www.southgatetimber.co.uk</a>	Imports/Timber trader
Surrey Timbers Ltd	Guildford	<a href="http://www.surreytimbers.co.uk">www.surreytimbers.co.uk</a>	Imports/Timber trader
Sydenhams Ltd	Bournemouth	<a href="http://www.sydenhamtimber.co.uk">www.sydenhamtimber.co.uk</a>	Imports/Timber trader
Sykes Timber	Atherstone	<a href="http://www.sykestimber.co.uk">www.sykestimber.co.uk</a>	Imports/Timber trader
Taylor Maxwell hardwoods	Bristol	<a href="http://www.taylormaxwell.co.uk">www.taylormaxwell.co.uk</a>	Imports/Timber trader
The Old Oak Import Company	Bangor-on-Dee	<a href="http://www.theoldoakcompany.co.uk">www.theoldoakcompany.co.uk</a>	Imports/Timber trader
Thorogood Timber Merchants	Colchester	<a href="http://www.thorogood.co.uk">www.thorogood.co.uk</a>	Imports/Timber trader
Timber Connection Ltd	Ware	<a href="http://www.timberconnection.co.uk">www.timberconnection.co.uk</a>	Imports/Timber trader
Timber Ireland	Cloghran	<a href="http://www.timberireland.ie">www.timberireland.ie</a>	Imports/Timber trader
Timberline	Tonbridge	<a href="http://www.exotichardwoods.co.uk">www.exotichardwoods.co.uk</a>	Imports/Timber trader
Timberpride Ltd	Tetbury	<a href="http://www.timberpride.co.uk">www.timberpride.co.uk</a>	Imports/Timber trader
Timbersource Ltd,	Shepton Mallet	<a href="http://www.timbersource.co.uk">www.timbersource.co.uk</a>	Imports/Timber trader
Timbmet Silverman	Stanford in the vale	<a href="http://www.timbmet.com">www.timbmet.com</a>	Imports/Timber trader
Totton Timber CO Ltd	Southampton	<a href="http://www.tottontimber.com">www.tottontimber.com</a>	Imports/Timber trader
Tradelink Wood Products Ltd	London	<a href="http://www.tradelink-group.com">www.tradelink-group.com</a>	Imports/Timber trader
Tyler Hardwoods Ltd	Marlborough	<a href="http://www.tylerhardwoods.co.uk">www.tylerhardwoods.co.uk</a>	Imports/Timber trader
UK Oak	Corby	<a href="http://www.uk-oak.co.uk">www.uk-oak.co.uk</a>	Imports/Timber trader
Venables Brothers Ltd	Cheswardine	<a href="http://www.venablesoak.co.uk">www.venablesoak.co.uk</a>	Imports/Timber trader
Vincent Timber	Sparkbrook	<a href="http://www.vincenttimber.co.uk">www.vincenttimber.co.uk</a>	Imports/Timber trader
W.L. West & Sons LTD	Petworth	<a href="http://www.wlwest.co.uk">www.wlwest.co.uk</a>	Imports/Timber trader
LDT Direct Timber	Brasted	<a href="http://www.directtimber.co.uk">www.directtimber.co.uk</a>	Imports/Timber trader
ProWood Ltd	Hindley Green	<a href="http://www.prowoodltd.com">www.prowoodltd.com</a>	Imports/Timber trader
Allan Binks Timber Ltd	Brandesburton	<a href="http://www.binkstimber.co.uk">www.binkstimber.co.uk</a>	Interior/exterior joinery
Altham Oak and Carpentry Ltd	Pendle	<a href="http://www.oak-beams.co.uk">www.oak-beams.co.uk</a>	Interior/exterior joinery
Altus Services Ltd	Abingdon	<a href="http://www.altus-services.co.uk">www.altus-services.co.uk</a>	Interior/exterior joinery
Ambass-a-Door Windows & Doors Ltd	Norwich	<a href="http://www.ambassadoor.co.uk">www.ambassadoor.co.uk</a>	Interior/exterior joinery
Andy Clarke Woodworks Design	Normanton	<a href="http://www.andyclarkewoodwork.co.uk">www.andyclarkewoodwork.co.uk</a>	Interior/exterior joinery
Arden Group Ltd	Coventry	<a href="http://www.ardenwindows.net">www.ardenwindows.net</a>	Interior/Exterior joinery
Barratt & Swann	Nottingham	<a href="http://www.barrattandswann.co.uk">www.barrattandswann.co.uk</a>	Interior/exterior joinery
Benchmark Joinery Guisborough Ltd	Guisborough	<a href="http://www.custom-joinery.com">www.custom-joinery.com</a>	Interior/exterior joinery
Benlow Stairs	Brownhills	<a href="http://www.benlowe.co.uk">www.benlowe.co.uk</a>	Interior/exterior joinery
Benlowe Group Ltd	Leicester	<a href="http://www.benlowe.co.uk">www.benlowe.co.uk</a>	Interior/exterior joinery
Blairs Limited	Greenock	<a href="http://www.blairswindows.co.uk">www.blairswindows.co.uk</a>	Interior/exterior joinery

Blake Joinery Co. Ltd	Bridgwater	<a href="http://www.blakejoinery.co.uk">www.blakejoinery.co.uk</a>	Interior/exterior joinery
Bowden & Tucker Joinery	Ashburton	<a href="http://www.bowdentuckerjoinery.co.uk">www.bowdentuckerjoinery.co.uk</a>	Interior/exterior joinery
Box 3 Design Ltd	Leicester	<a href="http://www.box3.co.uk">www.box3.co.uk</a>	Interior/exterior joinery
Distinctive doors Ltd	Sheffield	<a href="http://www.distinctivedoors.co.uk">www.distinctivedoors.co.uk</a>	Interior/exterior joinery
Good Bros Timber Merchants	Leominster	<a href="http://www.goodbros.co.uk">www.goodbros.co.uk</a>	Interior/exterior joinery
John Barnes Joinery Associates Ltd	Exmouth	-	Interior/exterior joinery
Spincraft Ltd	Coalisland Dungannon	<a href="http://www.spincraft.co.uk">www.spincraft.co.uk</a>	Interior/exterior joinery
Panel Agency Ltd	Longfield	<a href="http://www.panelagency.com">www.panelagency.com</a>	Manufacturer
Eaton Square	Staines	<a href="http://www.eatonsquare.co.uk">www.eatonsquare.co.uk</a>	Oak flooring
Border Oak Design and Construction Ltd	Kingsland	<a href="http://www.borderoak.com/">www.borderoak.com/</a>	Oak Framed building
Carpenter Oak & Woodland	Chippenham	<a href="http://www.carpenteroakandwoodland.com">www.carpenteroakandwoodland.com</a>	Oak framed building
Chartwell Buildings	Shoreham	<a href="http://www.chartwellbuildings.co.uk">www.chartwellbuildings.co.uk</a>	Oak framed building
Cheshire Oak Structures Ltd	Tilston, Malpas	<a href="http://www.cheshireoakstructures.co.uk/">www.cheshireoakstructures.co.uk/</a>	Oak framed building
Chippy Timber Kits	Mayfield	<a href="http://www.oakframedgarages.co.uk">www.oakframedgarages.co.uk</a>	Oak Framed building
Courtyard Designs Limited	Halesowen	<a href="http://www.courtyarddesigns.co.uk">www.courtyarddesigns.co.uk</a>	Oak Framed building
Crown Hill Timber	Halberton, Tiverton	<a href="http://www.colinbakeroak.co.uk/">www.colinbakeroak.co.uk/</a>	Oak Framed building
English Heritage Oak Buildings	East Sussex	<a href="http://www.ehbp.com">www.ehbp.com</a>	Oak Framed building
Green Oak Structures	Glastonbury	<a href="http://www.greenoakstructures.co.uk">www.greenoakstructures.co.uk</a>	Oak Framed building
Greenwood Oak Timber Framing Co.	Natiwich	<a href="http://www.greenwoodoak.co.uk/">www.greenwoodoak.co.uk/</a>	Oak Framed building
Hamlet Buildings Ltd	Ashford	<a href="http://www.hamletbuildings.co.uk">www.hamletbuildings.co.uk</a>	Oak Framed building
Heritage Oak Joinery	Norwich	<a href="http://www.heritageoak.co.uk/contact.htm">www.heritageoak.co.uk/contact.htm</a>	Oak Framed building
Hobbans Timberworks	High Ongar	<a href="http://www.hobbanstimmerworks.co.uk">www.hobbanstimmerworks.co.uk</a>	Oak Framed building
Knightwood Oak	Salisbury	<a href="http://www.knightwoodoak.co.uk/">www.knightwoodoak.co.uk/</a>	Oak Framed building
Lakeland Oak Ltd	Penrith	<a href="http://www.lakelandoak.co.uk/about.html">www.lakelandoak.co.uk/about.html</a>	Oak Framed building
Nationwide Oak Ltd	Enville, Stourbridge	<a href="http://www.nat-oak.com/contact.html">www.nat-oak.com/contact.html</a>	Oak Framed building
Norton Timber Ltd	Dover	<a href="http://www.nortontimber.co.uk/contact_us/">www.nortontimber.co.uk/contact_us/</a>	Oak Framed building
Oak Designs	Tonbridge	<a href="http://www.alter-image-uk.com/">www.alter-image-uk.com/</a>	Oak Framed building
Oak Frame Design	Barcombe	<a href="http://oak-designs.co.uk">oak-designs.co.uk</a>	Oak Framed building
Oak-Apple Frames LTD	Taunton	<a href="http://www.oakappleframes.co.uk/">www.oakappleframes.co.uk/</a>	Oak Framed building
Oakcraft	Burley	<a href="http://www.oakcraft.co.uk/">www.oakcraft.co.uk/</a>	Oak Framed building
Oakley Framing LTD.	Great Oakley	<a href="http://www.oakleyframing.co.uk/">www.oakleyframing.co.uk/</a>	Oak Framed building
Oakmasters	Haywards Heath	<a href="http://www.oakmasters.co.uk">www.oakmasters.co.uk</a>	Oak Framed building
Oakwrights	Swainshill	<a href="http://www.oakwrights.co.uk">www.oakwrights.co.uk</a>	Oak Framed building
Rockingham Oak	Market Harborough	<a href="http://www.rockinghamoak.co.uk/">www.rockinghamoak.co.uk/</a>	Oak Framed building
Roger Gladwell Classic Suffolk timberframes	Woodbridge	<a href="http://www.classicsuffolktimberframes.co.uk">http://www.classicsuffolktimberframes.co.uk</a>	Oak Framed building
Rookery Barns Ltd	Oakhanger	<a href="http://www.rookerybarns.com/">www.rookerybarns.com/</a>	Oak Framed building
Scottish Oak	Forfar	<a href="http://www.scottishoak.co.uk/index.html">www.scottishoak.co.uk/index.html</a>	Oak Framed building
Shires Oak Buildings	Ufton	<a href="http://www.shiresoak.co.uk/html/contact_us.html">www.shiresoak.co.uk/html/contact_us.html</a>	Oak Framed building
The Brookwood Barn Co Ltd	Eastleigh	<a href="http://www.oakbarns.com/contactus.htm">www.oakbarns.com/contactus.htm</a>	Oak Framed building
The Round Wood Timber Co Ltd	Mayfield	<a href="http://www.roundwoodtimber.com">www.roundwoodtimber.com</a>	Oak Framed building
The Timber Frame Company Ltd	Bruton	<a href="http://www.thetimberframe.co.uk/contact_us-104.html">www.thetimberframe.co.uk/contact_us-104.html</a>	Oak Framed building
Timber Framing & Conservation	Barrow Upon Soar	<a href="http://www.timberframing.org.uk/Page532.htm">www.timberframing.org.uk/Page532.htm</a>	Oak Framed building
Townsend Tradition	Slinfold	<a href="http://www.townsendtradition.co.uk/Townsend-Tradition/Contact_Us.html">www.townsendtradition.co.uk/Townsend-Tradition/Contact_Us.html</a>	Oak Framed building

Treewrights	Longniddry	<a href="http://www.treewrights.co.uk">www.treewrights.co.uk</a>	Oak Framed building
Welsh Oak Frame	Cearsws	<a href="http://www.welshoakframe.com/oakframecontact.htm">www.welshoakframe.com/oakframecontact.htm</a>	Oak Framed building
Westwind Oak Buildings Ltd	Yatton	<a href="http://www.westwindoak.com/contact_us.aspx">www.westwindoak.com/contact_us.aspx</a>	Oak Framed building
Yorkshire Oak Frames Ltd	Sicklinghall	<a href="http://www.yorkshireoakframes.co.uk/contact.htm">www.yorkshireoakframes.co.uk/contact.htm</a>	Oak Framed building
Direct LineTimber Ltd	Dundee	<a href="http://www.directlinetimber.org.uk">www.directlinetimber.org.uk</a>	Online shop
Ecotimber Ltd	Hartlepool	<a href="http://www.eco-timber.co.uk">www.eco-timber.co.uk</a>	Online shop
Hardwood Sales	Huyton, Liverpool	<a href="http://www.hardwoodtimersales.com">www.hardwoodtimersales.com</a>	Online shop
Howarth Timber Group Ltd	Leeds	<a href="http://www.howarth-timber.co.uk">www.howarth-timber.co.uk</a>	Online shop
iWood Timber Ltd	Hixon	<a href="http://www.iwood.co.uk">www.iwood.co.uk</a>	Online shop
Whitmore's Timber Co Ltd	Lutterworth	<a href="http://www.whitmores.co.uk">www.whitmores.co.uk</a>	Online shop
Arbor Forest Products Ltd	North Lincolnshire	<a href="http://www.arborforestproducts.co.uk">www.arborforestproducts.co.uk</a>	Softwood timber trade
Turnstyler tree houses	Wolverhampton	-	Timber framed building
Cranwood Industries Ltd	Warrenpoint	<a href="http://www.cranwoodindustries.com">www.cranwoodindustries.com</a>	Timber Manufacturer
Fitchett & Woollacott Ltd	Nottingham	<a href="http://www.fitchetts.co.uk">www.fitchetts.co.uk</a>	Timber Manufacturer
Floors in Wood	Glenrothes	<a href="http://www.floorsinwood.co.uk">www.floorsinwood.co.uk</a>	Timber Manufacturer
A. B. Lewis Ltd	Formby	<a href="http://www.ablewis.co.uk">www.ablewis.co.uk</a>	Timber trader
E.A. Stephens Ltd	Liverpool	<a href="http://www.eastephens.co.uk">www.eastephens.co.uk</a>	Timber trader
James Latham	Hemel Hempstead	<a href="http://www.lathamtimber.co.uk">www.lathamtimber.co.uk</a>	Timber trader
Nicks & Co Ltd	Gloucester	<a href="http://www.nickstimber.co.uk">www.nickstimber.co.uk</a>	Timber trader
NP Timber Co Ltd	Market Harborough	-	Timber trader
Ovans Pownall Timber Ltd	London	-	timber trader
Pontrilas Merchant	Pontrilas	<a href="http://www.pontrilasmerchants.co.uk">www.pontrilasmerchants.co.uk</a>	Timber Trader
Poyser Timber	Macclesfield	-	Timber trader
Smee Timber Ltd	Winsford	<a href="http://www.smeetimber.com">www.smeetimber.com</a>	Timber trader
SMI Hardwoods	Lawford	<a href="http://www.mlpanels.com/">http://www.mlpanels.com/</a>	Timber trader
Tembec Europe	Dublin	-	Timber trader
Vickers Timber Co Ltd	Brentwood	<a href="http://www.vickerstimber.co.uk">www.vickerstimber.co.uk</a>	Timber trader
Viking Plywood & Timber Ltd	South Shields	-	Timber trader
Ryall Edwards timber	Redhill	<a href="http://www.ryall-edwards.co.uk">www.ryall-edwards.co.uk</a>	Timber trader
T Brewer	Clapham	<a href="http://www.tbrewer.co.uk">www.tbrewer.co.uk</a>	Timber trader
Wenban Smith	Worthing	<a href="http://www.wenbans.com">www.wenbans.com</a>	Timber trader
Lathams Ltd	Hemel Hempstead	<a href="http://www.lathams.co.uk">www.lathams.co.uk</a>	wholesale