

Following on from the flooring industry's lead fairs – the Asian Century is well under way!

The first quarter of every year sees a flurry of activity in the international floor covering sector as companies the world over showcase trends and innovations at the industry's lead trade fairs. The flooring year was launched by the Domotex in Hanover followed by the Surfaces in Las Vegas and the biggest, most significant trade fair for the hard surface floor coverings industry at the end of March – the Domotex Asia in Shanghai.

The picture in laminate flooring markets around the world is one of varying degrees of stagnation. The only appreciable growth has been seen in China and in some of the emerging laminate flooring countries. The industry is on the search for alternatives. An ever more varied selection of decor effects, different surfaces and changing structures are the order of the day. But can these do anything to add momentum to a stagnating market and boost new volume growth?

"Anti-dumping duties" were the dominant issue of debate throughout the parquet industry in 2011. The industry is looking for a scapegoat for its margin and sales doldrums and has found a likely candidate in the Chinese manufacturers – despite the large number of manufacturers from Europe and Asia who are now themselves importing standard or non-standard products such as hand-scraped effects from China. This led to Chinese importers being penalized in the USA as the result of political pressure. The penalty imposed on most manufacturers was finally fixed within what may be considered comparatively acceptable limits at 5 %.

The trend in evidence over recent years has now become cemented. The laminate flooring boom has peaked, with worldwide sales now on the decline.

In Germany particularly, despite rising raw material costs, aggressive marketing campaigns by the DIY retail outlets are driving down prices to the end user. Classical three-block finished parquet flooring is following along the same path. Here, prices are being driven down to levels which are only cost-effective for a few large-scale manufacturers or importers. Cost covering and market penetration are the primary objectives here.

This trend is driving an escape into niche markets. An ever greater number of manufacturers are endeavoring to distinguish their offering from the competition by going down the special-purpose product route. Most of these products have evolved or been developed on the basis of existing technologies, coupled with a number of new product ideas.

Trend:

The trend towards rustic-look wood decor effects continues to grow worldwide: At least this is the direction being followed by most manufacturers. Class A qualities in the form of cottage flooring open up the promise of better margins, but raise problems in terms of procurement.

Profile and locking systems:

Here, glueless locking systems became the dominant force worldwide. Patent law disputes have been resolved for the time being at least since the Domotex Hanover, which is set to spark a renaissance of the familiar 5G or Megalock connection.

Whether printed, low-noise cork flooring, stone-look wood fibre flooring or vinyl flooring glued onto HDF backing will bring about in an increase in volume or whether worldwide growth limits have already been exhausted remains to be seen.

While Europe was generally seen as the trend-setter in the development and manufacture of new products, the Asian Century would appear to already be

in full swing in the field of hard floor coverings. One of the few really innovative new products in the flooring sector is so-called design or luxury vinyl tile (LVT) flooring. While the use of PVC was frowned upon up until just a few years ago, and at least in Central Europe had negative environmental associations, the product has generated two-digit growth in recent times on the strength of successful marketing campaigns with a new name – LVT flooring – and a whole new image. However, most European manufacturers opted not to go down this route, meaning that 90 % of the products originate from China and/or Korea. There are only a handful of LVT manufacturers in Europe.

The traditional structures in place within Europe tend to proceed with caution when it comes to product further development, which can stand in the way of innovation. The area of "outdoor floor coverings" could present a completely new and interesting field, for instance.

In 99 % of cases, wood-based material panels or laminated cores are the only substrate materials considered by laminate and parquet manufacturers. Why has there never been a move to adopt alternative substrate materials, cement panels or plastic panels derived from the mountains of waste created by our throwaway society, returning them to a second useful lease of life in our living rooms? Why do we finance bamboo floors with the presentation of CO₂ certificates which are then sold to airline companies or heavy industry?

These are the revolutionary lines of thought which are prevailing increasingly in Asia and in particular in China. Here, a whole new up-and-coming generation of entrepreneurs is on the rise. In China, many young corporations are emerging which have an intimate knowledge of the market, are receptive to new ideas and are able to implement them without bureaucratic constraints.

Rapidly increasing salaries (rising over 20 % per annum) as well as rising energy and space-related costs in China are forcing an underlying change in the way products are manufactured. While China's core strength used to lie in its low labor costs, this has already undergone a radical change. Today, we have here an enormous local market, a good infrastructure and a well developed mechanical engineering and supply industry. To address the problem of rising labor costs, an increasing number of companies are turning to automation, in particular to simple solutions with a payback of one to two years which still maintain the major benefit of Chinese production: Flexibility!

As a plant supplier to the hard floor coverings industry, how does the HOMAG Group get to grips with this phenomenon? A visit to the Domotex Asia in Shanghai provides some very indicative clues. HOMAG has never presented so many innovations to the international trade public as it did at this lead fair for the flooring industry – particularly in Asia and China.

At the fair, the HOMAG Group demonstrated a profiling and packaging plant tailored specifically to the medium performance category. It is capable of profiling 75 standard planks per minute, lacquering the chamfer inline and then packaging the planks automatically in cardboard trays (currently the trays still have to be manually folded). The machine plant was developed in accordance with HOMAG quality standards in cooperation with the long-established system supplier Wächter and produced at HOMAG Machinery Shanghai. The first of these plants off the production line has already made its way to a customer outside of China, in Azerbaijan. One reason for the customer's decision: the optimum cost-to-performance ratio.

Another highlight at the show is certain to be the newly designed throughfeed dividing line for laminate flooring panels. By combining a double-end tenoner with a rip cut saw, it was possible to address two major requirements imposed on the division of laminate flooring elements:

1. Precise part guidance during the dividing process, also permitting the division of plants with pressed-in chamfer.
2. Scope for dividing from above and below (for details see the Schulte patent) for savings of up to appr. 6 % during manufacture.

This was another world premiere unveiled in Shanghai. Developed in Germany, built at HOMAG Machinery Shanghai.

And last but not least, the newly developed LVT profiling plant. Unveiled for the very first time on the new FPR 265/266 series. It combines higher precision with smoother part guidance for ever thinner elements at rising feed rates – because this is a product for which demand is certain to grow in the future.

From the trend through the initial idea to individual project implementation, the flooring team project leaders from HOMAG Group Engineering supervise the plants and machines and provide customer support well beyond the acceptance stage on the customer's premises. Long-term partnerships lasting over years are frequently formed which lead on to new joint developments. Formerly these took place largely in Central Europe but are now spreading increasingly to Asia. And the HOMAG Group Engineering flooring team are not only concerned with "normal" flooring plants. Other related products using similar production techniques are also growing in significance. These include in particular plants for flooring elements used to produce outdoor floor coverings. Other requirements include the division and profiling of cement and plasterboard panels for the construction industry and in particular insulating panel plants for insulation used in rooms to be heated or air conditioned.

Experience gained with developments created by the HOMAG Group Engineering flooring team can also be invaluable when designing new concepts in the furniture production industry.

Examples include the patented click system developed by Unilin for assembling flat pack furniture.

HOMAG Group Engineering is the right partner when it comes to the development of new products and solutions using new lines of approach.

Pictures courtesy of: HOMAG Holzbearbeitungssysteme GmbH

Innovations from the HOMAG Group at the Domotex Shanghai

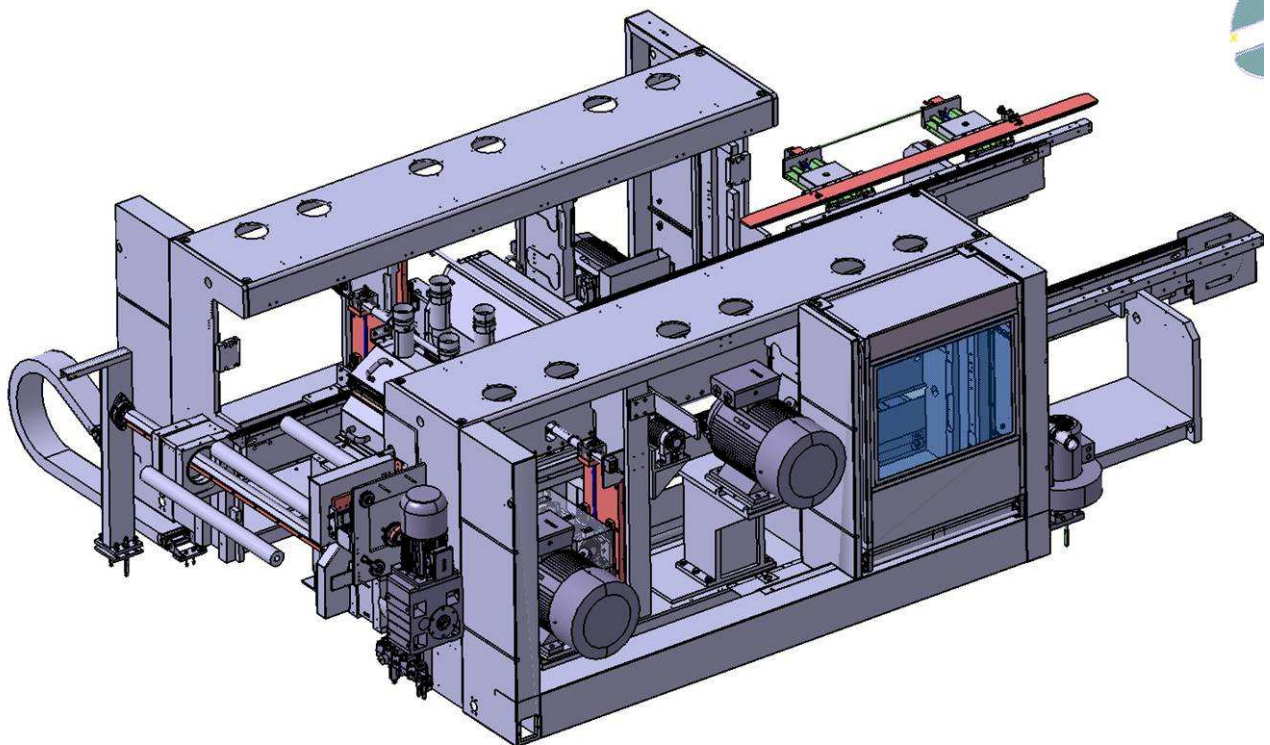


Fig. 1:
Newly developed throughfeed saw on double-end tenoner with grooving/dividing saw from above and below for the economic division of laminate flooring with pressed chamfer

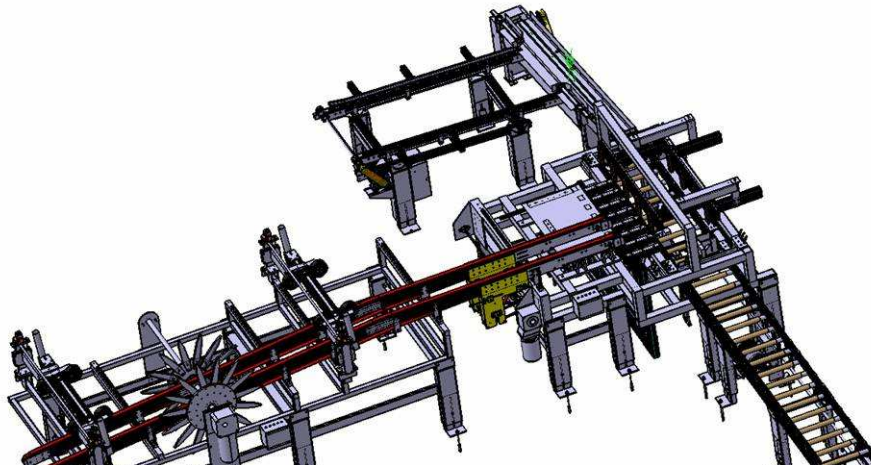


Fig. 2:
Newly developed packaging system for the automatic packaging of hard floor coverings and automatic insertion in pre-folded cardboard trays



Fig. 3:
New reinforced series FPR 265/255 in a narrow-part version for profiling parquet, LVT or laminate flooring

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