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Trends of Hardwood Lumber Use in Making Household Furniture

By Steven H. Bullard

Hardwood lumber has long been a "mainstay" raw material for U.S. furniture makers. Its importance relative to other raw materials, however, has changed significantly during the past 40 to 50 years.

Trends in the use of hardwood lumber for making household furniture are influenced by many factors, but an important point is very clear from past

years: consumer trends, particularly broad trends in preferences for furniture styles, dominate the factors that influence hardwood lumber use in household furniture. This point is discussed below as "A Lesson from the Past," and is also applied to an "Outlook for the Future" for hardwood lumber in use in household furniture.

Twenty-five years ago, the lead paragraph of an article published in the technical journal of the Forest Products Research Society stated:

"Hardwood lumbermen are losing their quality market: the furniture industry. Between 1947 and 1960, this industry made 71 percent more furniture with 1 percent less lumber. Relative to production, lumber use in the manufacture of furniture and fixtures declined by 1.4 billion board feet! Why?"

(Dr. Vernon Robinson, Forest Products Journal, July 1965)

Why were "hardwood lumbermen losing their quality market" in the 1950s? Dr. Robinson presented two important reasons — furniture styles were changing, and *substitution* was taking place with other raw materials. The use of plywood, metals, plastics and other products increased because they were becoming widely available and competitive with hardwood lumber in cost and versatility. Perhaps the most important "lesson from the past" in the case, however, is that opportunities to use substitutes for hardwood lumber arose as consumers

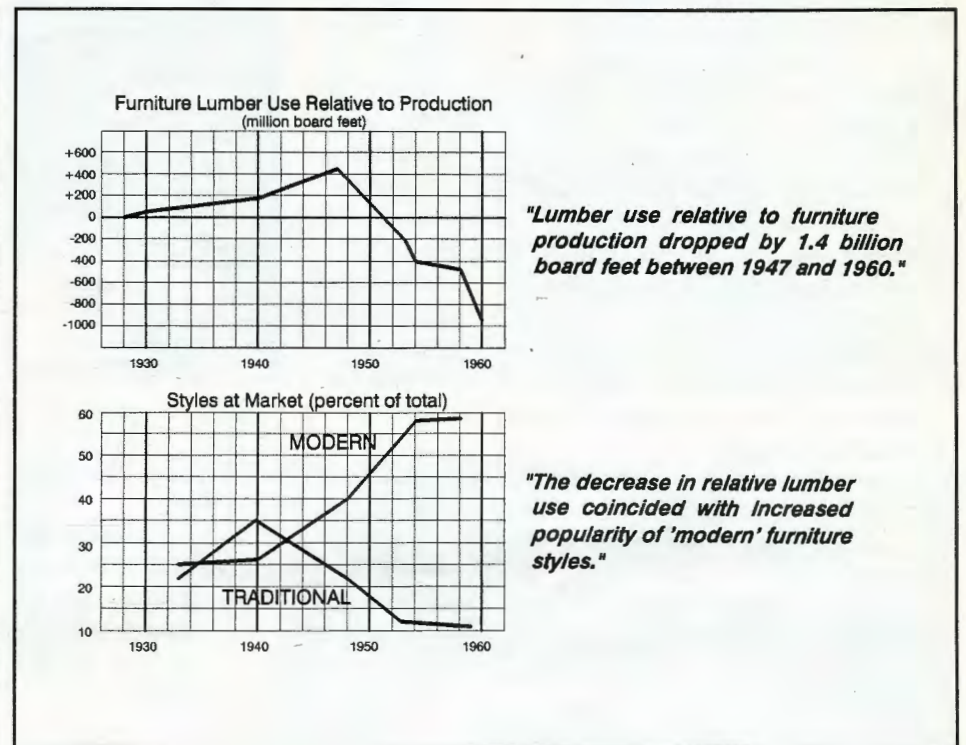


Figure 1

increasingly preferred contemporary or "modern" furniture styles. The contemporary furniture styles of the 1950s simply required less hardwood lumber than traditional styles such as Early American, Victorian, or the "waterfall modern" furniture that was popular in the 1930s and early 1940s.

The dramatic effect of changes in furniture styles on lumber consumption by the industry shown in Figure 1 (a composite adapted from two graphs originally presented in Dr. Robinson's article). The top graph in Figure 1 is an index of lumber used in furniture manufacturing in the U.S. relative to

the total level of furniture output. The index increased until 1947, then declined dramatically, dropping by 1.4 billion board feet by 1960. Throughout the time line of the graph, the lumber is primarily hardwood (82 percent in 1960, for example).

The lower part of Figure 1 shows why the relative "market loss" occurred. Based on furniture style surveys of casegoods shown in the Chicago and Grand Rapids markets, the popularity of "modern" furniture styles increased dramatically in the late 1940s and early 1950s. Traditional furniture styles shown at these markets peaked in popularity in 1940, and the index of relative wood use peaked seven years later.

The lag is probably due to several factors. The markets are wholesale markets, and they may lag behind or they may even precede true changes in consumer preferences. Also, early 1940s styles of "modern" furniture tended to use much more wood per piece than modern furniture of the late 1940s and 1950s.

Since 1960, the relative use of hardwood lumber for furniture production has continued to be directly influenced by prevailing furniture styles.

Figure 2 illustrates trends in the relative use of hardwood lumber, softwood lumber and composite panels in household furniture production. The figure is based on information compiled by Dr. William Luppold of the USDA Forest Service in West Virginia.

The figure tends to reinforce the "lesson from the past" of the 1950s — that style is a dominant factor in the relative use of raw materials in furniture, including the use of hardwood lumber. The impact of style trends is


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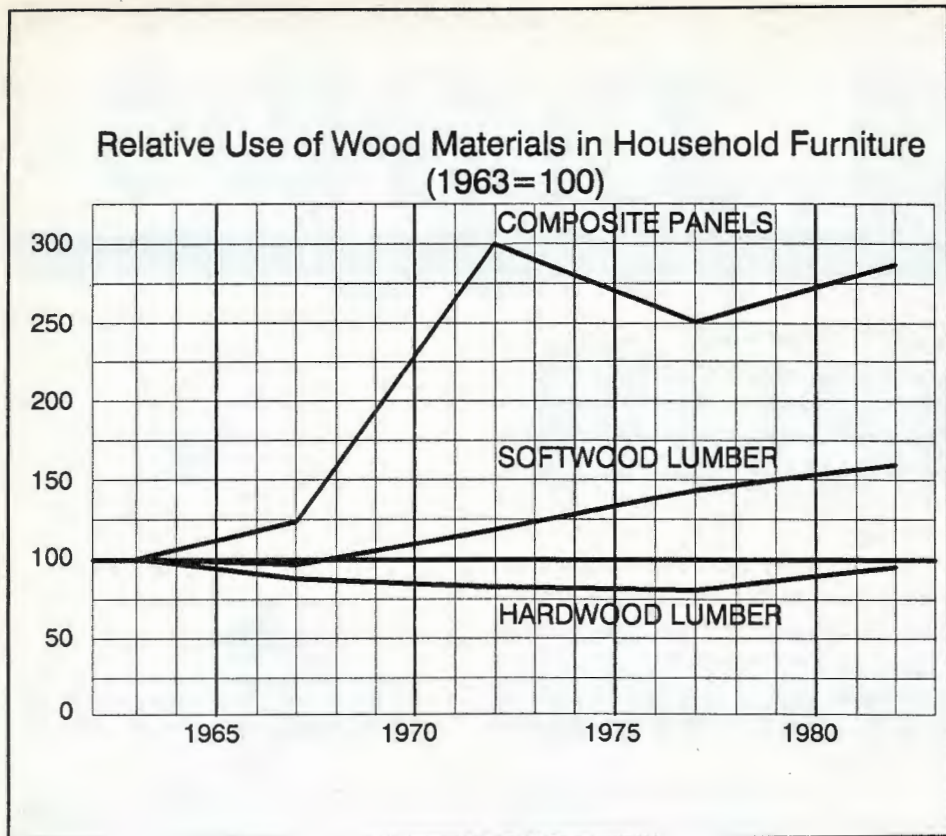


Figure 2

shown in Figure 2 by the drop in relative use of composite panels in the 1970s, and by the reversal of the historic trend of declining relative use of hardwood lumber. These trends seem to be due to an increase in the popularity of traditional furniture styles; as stated by Dr. Luppold:

"Since hardwood lumber prices have increased as fast or faster than the prices of competing products, the increase in lumber use probably stems from consumer desires for more hardwood lumber rather than furniture manufacturers efforts to reduce costs."

Since furniture styles and "consumer desires" have been a dominant factor in hardwood lumber use in the past, what are the current trends in styles and "desires," and what do they portend for hardwood lumber use in furniture in the 1990s?

Traditional furniture styles continued to increase in popularity through the 1980s, and recent surveys at national markets show that traditional styles of furniture remain in strong demand by consumers.

Since occasional tables are purchased more frequently than other, larger pieces of furniture, demand trends in occasional tables have come to be considered leading indicators of overall trends in furniture style. Since the late 1970s, and increasing percentage of the wood occasional tables shown at national markets have been in traditional rather than contemporary styles (surveys by R.D. Behm Co., Vancouver, WA, for the Northwest Hardwoods Division of Weyerhaeuser).

What furniture designs will be popular in the 1990s? If occasional table demand is a leading indicator, traditional styles will continue to be popular, oak lumber will maintain its strong demand, and cherry, mahogany, pine and walnut-pecan woods will increase in popularity.

The promotional campaign for solid hardwood furniture sponsored by the Hardwood Manufacturers Association

is an additional, positive factor for hardwood use in the 1990s. The campaign has been well-organized and well-designed; it emphasizes investment value, durability and other qualities of solid hardwood furniture that U.S. consumers are expected to increasingly prefer in the 1990s.

Although traditional furniture styles have increased in popularity in recent years, it should also be emphasized that no one "dominant theme" has emerged as a strong trend in style for the 1990s. Several prominent furniture designers, for example, have emphasized that overall comfort and function will be more important to consumers than specific styles.

"Mix-and-match," or what designers have called "eclecticism," is expected to dominate consumers' furniture buying in the 1990s. This "trend" is important to hardwood lumber processors and users. However, since the ability to "mix-and-match" is a clear attribute of hardwood furniture, an attribute also highlighted in the campaign to promote solid hardwood furniture by the Hardwood Manufacturers Association.

Just as in the past, many factors will influence the relative importance of hardwood lumber in U.S. furniture production in coming years. Timber availability, lumber prices, lumber export markets and furniture imports are a few of the issues that will directly influence U.S. manufacturers' production decisions. Although many factors influence manufacturers' decisions, household furniture is ultimately a consumer product, and if recent trends in consumer preferences are a prologue to the future in this industry, hardwood lumber will continue to be in strong demand for household furniture throughout the 1990s. □

(Dr. Bullard is associate professor of forestry economics at Mississippi State University. His various published reports are available by writing Dr. Bullard, P.O. Drawer FR, Mississippi State, MS, 39762.)

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