The attitudes of participants in the chain of use of wood products

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An indisputable facts:

- Many companies in different economic branches are at the crossroad of their life cycle
- Unpredictability of business changes, competition, the unstoppable globalization trends, innovations make market competition and survival increasingly more complex and demanding,
- The necessity to satisfy market needs of buyers/consumers encourage companies (even force them) to some extent to cooperate experts who can contribute to creating and/or increasing the value and, consequently, the use of their products

... INFORMATION IS A RESOURCE WHICH CREATES NEW PRODUCT VALUE ...

IN FURNITURE INDUSTRY: architects, designers, investors, the media, sellers,...
Wood and wood products use in Croatia is still at an unacceptable level, consequently the opinions and suggestions of experts who participate or may participate in stimulating the end used to consume wood products is exceptionally important... to examine and establish how the previously selected participants perceive and view the Croatian wood industry.
MATERIAL AND METHODS

- Secondary used data - - -from research which was part of the advertising campaign ‘Wood is first’
- Last from July to September 2009
- Comprised the territory of Croatia
- For quantitative data collection a phone questionnaire was used
- For qualitative data collection in-depth interview ‘one to one’ was used
- 100 usable responses from quantitative phone questionnaires
- 10 usable from in-depth interviews
Croatian wood industry should be given over to foreigners.

Croatia invests a lot in the wood industry.

Croatian wood industry is not lagging behind in comparison to the rest of the world's wood industry.

Croatian forests are managed in a proper way.

Wood industry is a very important industry.

Wood industry is a perspective industry in Croatia.

Expert opinions about the Croatian furniture industry:

- Wood industry is a perspective industry in Croatia:
  - Strongly disagree: 16%
  - Disagree: 43%
  - Neither agree nor disagree: 27%
  - Agree: 12%
  - Strongly agree: 9%
  - Don't know: 0%

- Wood industry is an industry that can help Croatia in current economic crises and recession:
  - Strongly disagree: 11%
  - Disagree: 37%
  - Neither agree nor disagree: 25%
  - Agree: 19%
  - Strongly agree: 12%
  - Don't know: 0%

- Wood industry is an important industry:
  - Strongly disagree: 5%
  - Disagree: 15%
  - Neither agree nor disagree: 27%
  - Agree: 35%
  - Strongly agree: 0%
  - Don't know: 0%

- Croatian forests are managed in a proper way:
  - Strongly disagree: 2%
  - Disagree: 12%
  - Neither agree nor disagree: 39%
  - Agree: 20%
  - Strongly agree: 27%
  - Don't know: 0%

- Croatian wood industry is not lagging behind in comparison to the rest of the world's wood industry:
  - Strongly disagree: 43%
  - Disagree: 15%
  - Neither agree nor disagree: 25%
  - Agree: 4%
  - Strongly agree: 12%
  - Don't know: 0%

- Croatia invests a lot in the wood industry:
  - Strongly disagree: 39%
  - Disagree: 27%
  - Neither agree nor disagree: 4%
  - Agree: 4%
  - Strongly agree: 6%
  - Don't know: 0%

- Croatian wood industry should be given over to foreigners:
  - Strongly disagree: 76%
  - Disagree: 9%
  - Neither agree nor disagree: 9%
  - Agree: 4%
  - Strongly agree: 0%
  - Don't know: 0%
Expert perception of wood industry

- Inadequate production technology
- Design is the biggest problem
- Poor management
- Lack of specialized personnel
- Exaggerated export of raw material
- A shortage of final products
- Quality of final products
- The absence of investments

- The need for interest associations
- Business strategy, future vision
- To be more market oriented

... the wood industry is undergoing a difficult period with little possibility of recovery in the future, unless

A GOOD FINAL PRODUCT WITH ACCEPTABLE PRICE, QUALITY, AND GOOD DESIGN IS MANUFACTURED !!!!!
Experts’ suggestions on the use of material for different parts of the interior (n=63)

- **Constructions**: 11% Investors, 59% Architects, 5% Designers, 25% Other (e.g. Civil engineer)
- **Furniture**: 19% Investors, 60% Architects, 19% Designers, 2% Other (e.g. Civil engineer)
- **Doors/Windows**: 16% Investors, 73% Architects, 3% Designers, 8% Other (e.g. Civil engineer)
- **Ceramics**: 19% Investors, 73% Architects, 5% Designers, 3% Other (e.g. Civil engineer)
- **Floor coverings**: 14% Investors, 75% Architects, 6% Designers, 5% Other (e.g. Civil engineer)
Expert opinions on the use of wood materials in construction and interior decorating

<table>
<thead>
<tr>
<th>CHARACTERISTICS OF WOOD MATERIALS USED IN CONSTRUCTION AND FURNISHING</th>
<th>USAGE OF WOOD MATERIALS IN CONSTRUCTION ON THE BASIS OF THEIR CHARACTERISTICS</th>
</tr>
</thead>
</table>
| • Pleasant  
• Ecologically acceptable  
• Warm  
• Traditional  
• Reliable  
• Attractive looking  
• Trendy (modern)  
• Natural  
• Timeless | • Renewable  
• Good thermal insulator  
• Durability  
• Short construction time |
| • Old-fashioned  
• Requireness for frequent maintenance  
• Price | • Price |
Selection of materials for furniture and interior parts by experts in the situation when prices would be equal for all materials (n=63) (multiple responses possible)

- **Wood (massif)**
- **Plywood, MDF**
- **PVC**
- **Steel/Aluminium**
- **Glass**
- **Other**

<table>
<thead>
<tr>
<th>Furniture Type</th>
<th>Wood (massif)</th>
<th>Plywood, MDF</th>
<th>PVC</th>
<th>Steel/Aluminium</th>
<th>Glass</th>
<th>Other</th>
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</thead>
<tbody>
<tr>
<td>Kitchens</td>
<td>63</td>
<td>33</td>
<td>4</td>
<td>4</td>
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<td>1</td>
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<tr>
<td>Shelves</td>
<td>79</td>
<td>19</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Windows</td>
<td>81</td>
<td>19</td>
<td>2</td>
<td>4</td>
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<tr>
<td>Closets</td>
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<tr>
<td>Doors</td>
<td>83</td>
<td>13</td>
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<td>3</td>
<td>2</td>
<td>1</td>
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<tr>
<td>Chairs</td>
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<td>4</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>
Experts’ criteria for selecting producers/suppliers of material for furniture or interior parts (n=73)

- **Floors**
  - Price: 13
  - Quality: 62
  - Previous cooperation: 11
  - Reference: 2
  - Delivery: 5

- **Doors/Windows**
  - Price: 14
  - Quality: 70
  - Previous cooperation: 10
  - Reference: 2
  - Delivery: 2

- **Furniture**
  - Price: 13
  - Quality: 52
  - Previous cooperation: 22
  - Reference: 28
  - Delivery: 2

- **Ceramics**
  - Price: 14
  - Quality: 64
  - Previous cooperation: 17
  - Reference: 17

- **Wood constructions**
  - Price: 10
  - Quality: 68
  - Previous cooperation: 8
  - Reference: 5

- **Source of material**
  - Domestic or foreign: 6
Expert views on purchasing domestic or foreign wood products (n=93)

- More often from Croatian wood producers: 44%
- More often from foreign wood producers: 12%
- Equally from Croatian and foreign wood producers: 28%
- I don't know: 5%
- I don't buy wood products: 11%
• Experts perceive the Croatian wood industry as a promising branch which can help the country in the current economic situation

• Not enough is invested in its development and it lags behind other industries

• Technological development, the problem of design, poor business activities, excessive export of raw material, and the lack of final products are considered as the biggest problems

• Experts consider wood as high quality material with excellent characteristics, including in the first place renewability and durability

• In a hypothetical case of equal prices of all the materials, the majority of the experts would opt for wood as the most suitable material for different interior parts.
All of the respondents stress that the most important factor in the selection of doors and windows is the quality of the product, while in the choice of furniture, they all emphasize design.

Almost one half of the respondents prefer to purchase furniture from Croatian manufactures for reasons of familiar origin and quality.
QUESTIONS? COMMENTS?

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THANK YOU!