

It is generally understood in the industry that the volume of imported flooring is approximately 1 per cent of Japan's overall flooring production volume. Imports in 1989 are estimated at 610 000 m² (see Table 11).

Table 11

Estimated Flooring Imports

Year	Quantity (^{'000} m ²)
1982	370
1983	400
1984	380
1985	390
1986	450
1987	600
1988	630
1989 est.	610

Source: KF International, based on assumption that imports equal 1 per cent of production.

About 70 per cent of imported hardwood flooring is solid strip. The remaining is herringbone, flooring blocks and mosaic parquet.

In 1988, Thailand and the United States were the top importers to the Japanese market in the "Wood, n.e.s. planed, grooved, tongued, etc." category with 13 per cent each by volume (see Table 12). At least 40 per cent came from southeast Asia, less than 1 per cent came from Canada.

Table 12

Imports of "Wood, n.e.s. planed, grooved, tongued, etc." by Country - 1988

Country	Quantity		Value (¥ million)
	(m ³)	(%)	
Thailand	6 514	13.6	1 253
U.S.	6 150	12.9	1 204
Indonesia	3 591	7.5	266
Taiwan	2 817	5.9	517
Malaysia	998	2.1	61
Singapore	976	2.0	157
Canada	274	0.6	42

Source: Ministry of Finance.

Three imported brands of flooring that account for approximately 90 per cent of the imported solid-strip flooring market in Japan are the U.S. manufacturers Bruce, Chickasaw and Robins.

The largest market share is held by Bruce (50 per cent imported by Nittobo and others) followed by Chickasaw (20 per cent imported by several importers/distributors including ABC Development and Santa Tsusho) and Robins (15 per cent imported by several importers/distributors).

Trends in Demand

Japan's rapid economic growth after the Second World War brought about distinct changes in Japanese lifestyles. For example, the use of Western-style chairs and tables in homes became common practice. Broadly referred to as "westernization," these changes in Japanese lifestyles led to the ready acceptance of vinyl and carpeted floors in Japanese homes.

Carpeting more or less dominated the flooring market until 1984. Increasing consumer concern regarding carpet mites and their adverse effects on health, apparently triggered by extensive media coverage including a television special on a public broadcast channel, resulted in a consumer preference shift from carpeting to hardwood flooring.

In Japan, where shoes are not commonly worn in the house, regardless of Japanese or Western styling, special care is required to ensure extra smoothness in flooring finishes. The emerging dominance of composites and the decline in hardwood-strip installation skills means these standards are now easier to achieve with the former.

As a consequence of composite dominance, there has been a definite decrease in the number of Japanese carpenters skilled in handling solid-wood materials. The contracting industry frequently complains about the difficulties of handling solid-wood products. Though many of the complaints centre on problems such as water content, warping, rough finishing and measurement inaccuracies, the bottom line is that the fundamental skills required to eliminate these problems are not available.

The problems cited are not serious for skilled workers. Nevertheless, the problems have to be addressed and resolved to obtain wider market acceptance.