



Belated recognition



Mr. and Mrs. Yamaguchi receive industry recognition from Craig Larsen (SEC)

The recently held gathering of US industry representatives for the American Wood Design Awards in Tokyo gave a unique opportunity for the US softwood industry to recognize the recent retirement of its long-time Japan representative, Ikuo, "Yami" Yamaguchi. An industry recognition dinner in the US set for March was cancelled when Yami had a second medical emergency in Japan.

Yami's more than 25 years of outstanding service to the industry was honored and recognized by a number of forest products organizations

(Continued on page 3)

In this issue

Outlook on Greece	2
Mexico furniture	2
China market mission	3
EBPA Gateway	3
Western species	3
IFPM Conference	4
Upcoming events	4

EU markets improve

Eddie Pearce, UK

During the second quarter of 2002 there has been a general improvement in the economies of most of the EU countries with exception of Germany. This improvement is also reflected in the increased level of imports of US softwoods during this period where Belgium, France, Germany and Italy have shown some significant gains over the same period in 2001.

Belgium-Luxemburg

The economies of Belgium and Luxemburg are beginning to show signs of improvement, particularly in the building and construction industries and this can be seen in the exports of US softwoods in the first quarter (Jan-March) of 2002 when compared with the same period last year. Douglas fir has made particular improvement at 1290m³ as against 191m³ in 2001.

US Douglas-fir is the first choice for house builders in southern Belgium and north-eastern France. The past 18-24 months French Douglas has been used because the strength of the US dollar made the US Douglas-fir uncompetitive. Now that the dollar is weakening builders are going back to their preferred choice.

Denmark

In Denmark the economy remains stagnant. The building and construction industry has been relatively quiet for the past few months and thereby affecting demand for timber products such as flooring.

Germany

The economic situation in Germany continues to be poor. The building and construction industries are at their lowest level in 15 years and the situation is reflected in the window market, which is of the most interest to *American Softwoods*.

Whilst participating at FENSTERBAU 2002 in Germany earlier this year it was reported how the German window industry has been affected by the recession with the publication of the following production figures:

2000: 19.5 mil window units
2001: 16.0 mil window units
2002 forecast: 14.4 mil units

However, the volume of Douglas-fir has risen during the first six months of this year. According to the timber trade this is due to 1) far eastern species, such as Meranti, have become less competitive, and 2) the weakening of the US dollar has made Douglas-fir more competitive and the manufacturers are returning to their first choice specie, Douglas-fir.

France

The French economy continues to improve and this is reflected in the general well being of the building and construction industry.

Following a slow first quarter US exports to France have improved by 74.6% compared with the same period last year.

(Continued on page 2)

Markets

July / August 2002

Outlook on Greece

Ignacio Martinez, Spain

Although Greece's market for American wood products has experienced reasonable growth during the past few years, the overvalued US dollar has put a drag on exports to this market just as it has to many other European countries. As a result, Greek softwood demand has shifted from high-grade US softwood lumber to German, Scandinavian, and Austrian material. However, importers agree that the recent weakening of the US dollar and the relatively low lumber prices in the US should fuel export demand rapidly. For the short term, a slight rise in US softwood demand is expected for construction activity planned for the 2004 Olympic Games in Athens.

Greece is only able to meet one-third of its wood product consumption needs. Although the market is heavy to European redwood and spruce, there is some demand for Southern Pine and Douglas fir. According to many Greek importers, US species are imported for re-manufacturing into flooring, doors, windows, and other applications.

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Mexico furniture

The SEC, along with the WWPA, recently participated in the TECHNOMEUBLE trade show in Guadalajara, Mexico. Over the course of this three day show numerous attendees stopped by the booth to ask questions and pick up information on U.S. softwoods. Dr. Ramon Echenique-Manrique SEC/SPC was present to answer many questions from show attendees.

During the show a representative of Carta Camera Guadalajara Mexicana de la Industria (a trade association of forest products wholesalers), met with the SEC / WWPA. This group is interested in contacting suppliers of Ponderosa pine lumber. A group of representatives from the Catra will be touring mills in the western US in late August 2002. For more information about this visit please contact Allan Czinger at (503) 248-0406.

(Europe—Continued from page 1)

According to French importers contacted at the Carrefour International du Bois in Nantes, reasons for this change were the improved strength of the Euro against the dollar and the fact that Douglas-fir is the preferred species for windows and construction, in spite of competition from domestically produced Douglas-fir.

Ireland

Following several years in the growth of the building and construction industry in Ireland, a significant slowdown has been observed during the latter part of 2001 and continuing into 2002, resulting in a lower rate of new houses being built. American softwoods demand has decreased. Exports to Ireland have

Gateway program

Approximately 100 builders, building materials importers and real estate developers from Japan, Taiwan, Korea and a large contingent from China will visit Seattle, WA and Portland, OR on August 19 - 20 for the EBPA summer Gateway program. The two-day seminar and site visit program focuses on luxury housing, design, and US wooden building materials. An additional educational program is being arranged for Taiwan builders.

The educational seminar program also includes a mini trade show of US housing products and a reception to meet the participants on Monday August 19, from 4 to 7 pm in Seattle. The Portland tour will include the Street of Dreams housing exhibition. More information on the EBPA website www.ep.org.

fallen by 60% compared with the same period last year.

The United Kingdom

The UK economy continues to move smoothly and positively. However, the forecast for 2002 is that it will not be as high as it was in 2001. UK importers' opinion is that imports of American softwoods will improve during the second half of 2002.

The Netherlands

The continued increase in the import levels of Douglas-fir from the US confirms the increased activity in the window manufacturing sector in the Netherlands. Douglas-fir exports stand at 100% above the level compared with same period last year

The full report is available through the market research section of the SEC website www.softwood.org.

Programs

July / August 2002

SEC members meet China markets



Ken Bronson (WCLIB) with Douglas-fir butcher-block table made from reclaimed timbers

Shanghai, China

Softwood Export Council program marketing manager, Allan Czinger, recently led a small softwood market assessment trade mission to China. The one week trip included SEC member representatives Ken Bronson, WCLIB, Lee Green, WWPA, and Jim Snodgrass, WMMPA.

The trip concentrated its activities in the Shanghai area touring furniture factories, Chinese importers and wholesalers, the local building materials market, and new building construction sites. The group met a number of Chinese furniture producers using softwoods from around the world including US lumber species. In Shanghai alone more than 2,500 high rise buildings have been constructed in the past few years. Opportunities for interior fittings seem to be in abundance.

AHEC Convention

The SEC contingent also represented the US softwood lumber industry at the annual American Hardwood Export Council SE Asian and Greater China convention, also held in Shanghai. The convention attendance gave western softwood representatives the opportunity to mingle and make contact with more than 700 Asian wood buyers. SEC also provided the attendees with copies of each of the SEC publications available in simplified Chinese. The SEC advanced its interiors softwood promotional efforts by participating in a press conference which was part of the AHEC conference activity schedule.

The full trip report is available to SEC members. Contact Allan Czinger at the SEC.

(Yami—Continued from page 1)

including: the American Forest and Paper Association (AFPA), APA, the Engineered Wood Association (APA-TEWA), the Center For International Trade in Forest Products (CINTRAFOR), the USDA Foreign Agricultural Service in both Washington DC and Tokyo (FAS), the Southern Forest Products Association (SFPA), The West Coast Lumber Inspection Bureau (WCLIB), the Western Wood Products Association (WWPA), the Wood Moulding and Millwork Producers Association (WMMPA), and the Softwood Export Council (SEC).

Photos of the reception are available for viewing on the SEC website.

Western species



The latest publication, *Softwoods of the Western USA*, has recently rolled off the presses and onto the SEC website. International offices will be receiving their inventory shortly. The publication provides color photos of 18 western US species, showing both clear and knotty grades. Species working properties and other general information is also included.

The brochure was designed to complement SEC promotional activities aimed at the interior fittings and furniture market segments in markets such as China, Mexico, Korea, Japan, and Europe. The publication is in four languages and is available on the SEC website for instant access.

Western Species joins four other SEC publications, *Douglas-fir*, *Western Hemlock and the True firs*, *Ponderosa Pine*, and the *Western Species Grade Guide* on the SEC website in the quickly downloadable HTML format. The publications are currently available in six different language editions.

Events

July / August 2002

SEC MEMBER ORGANIZATIONS

Alaska Manufacturers Association

American Institute of Timber Construction

California Redwood Association

Center for International Trade in Forest Products

Evergreen Building Products Association

Northwest Wood Products Association

OSU Forest Products Department

Pacific Lumber Exporters Association

Pacific Lumber Inspection Bureau

Washington State Office of Trade and Economic Development

West Coast Lumber Inspection Bureau

Western Wood Products Association

Wood Moulding and Millwork Producers Association

IFPM Conference set

The 2002 International Forest Products Marketing Conference will take place on September 26th and 27th

Conference themes will include:

- * Macro-economic overview
- * Financial trends and timber markets
- * Economic outlook for Asian markets
- * Overview of log, lumber, panel and chip markets
- * Opportunities and obstacles in

China and other emerging markets

- * Regulatory reform and opportunities in Asian markets

The conference is an annual presentation of the Center for International Trade in Forest Products. The venue is the Mountaineers Building at 300 Third Ave, West, Seattle. Program information, including a registration sheet is available from the CINTRAFOR website linked to the SEC home page.

Upcoming Events

EBPA Gateway program, Seattle, Portland, August 19-20, 2002
CINTRAFOR IFPM conference, Seattle, WA; September 26-27, 2002
Taipei Constructions Show, Taipei, Taiwan; October 3-6, 2002
Western Softwood Lumber Mission, Japan, October 2002
EXPO CIHAC, Mexico City, Mexico; October 17-22, 2002
US Industry—JLIA meeting, Tokyo November 11-13, 2002
Tokyo Home Show, Tokyo, November 19-22, 2002
Home Builders Expo, Osaka, November, 26-27, 2002
EBPA-Industry China Trade mission, November 4-16, 2002
Construction Trade Fair, Chengdu, China, November 12-16, 2002
Building China 2002, Beijing, November 13-16, 2002
AFSI Trade Show, Birmingham, UK, November 17-20, 2002

For links to information on these events go to www.softwood.org/calendar

US western softwood publications on grading, species, and uses are online at

www.softwood.org/publications

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