

The Import/Export Wood Purchasing News
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Serving Forest Products Buyers Worldwide



December 2008/January 2009

Annual NHLA Convention Attracts Worldwide Gathering

By Gary, Terry, Wayne and Paul Miller Jr.

San Francisco, California—The economy, certified wood products and the international market were among the most debated topics at the recent 2008 NHLA 111th Annual Convention and Exhibit Showcase, held at the San Francisco Marriott. Additional photos on pages 10 & 12

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Pierre Cadrin, C.A. Spencer Inc., Laval, Que.; Trevor Vaughan, Ron Jones Hardwood Lumber Sales Inc., Union City, Pa.; Orm Gudmundsson Jr., Northland Corp., LaGrange, Ky.; Claude Cadrin, C.A. Spencer Inc.; and Bob McCabe, Bingaman & Son Lumber Co. Inc., Kreamer, Pa.

Tours Highlight HMA Meeting

By Terry Miller

Manchester, New Hampshire—Members of the Hardwood Manufacturers Association (HMA), many of whom are exporters, convened at The Highlander Inn & Conference Center, located here, to hear tips about conserving forests

Additional photos on pages 14 & 16

Continued on page 13



Jeff Manges, Cole Hardwood Inc., Logansport, Ind.; Rick Smrcka, Wolf River Lumber Inc., New London, Wis.; Angie Capper, Pike Lumber Co. Inc., Akron, Ind.; and Bob Miller, Frank Miller Lumber Co. Inc., Union City, Ind.

AHEC Members Consider Export Progress

Photos By Gary and Terry Miller

Additional photos on page 16



John Read, Rossi American Hardwoods, Cromwell, Conn.; (seated) Ted Rossi, American Hardwood Industries Inc.; (standing) Larry Evans, Industrial Timber & Lumber Corp., Beachwood, Ohio; Shabbir Zavery, Goodwood Forest Products Corp., Richmond Hill, Ont.

San Francisco, California—American Hardwood Export Council (AHEC) members met here recently in conjunction with the annual national convention of the National Hardwood Lumber Assoc. (NHLA) to discuss progress made by the group in 2008. Among the topics discussed during the AHEC meeting were the Lacey Act and the recent independent verification that American hardwoods

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International Impact On Hardwoods Discussed

By Gary, Wayne and Paul Miller Jr.

San Francisco, California—Members of the International Wood Products Association (IWPA) gathered during the recent National Hardwood Lumber Association convention to enjoy a social reception and exchange viewpoints on the international market. Additional photos on page 12

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Jim Mills, Craig Lumber Corp., Collierville, Tenn.; Donna Bliss and Steve McKeever, Sitco Lumber Co., Dallas, Texas; and Steve Stoufflet, Robinson Lumber Co. Inc., New Orleans, La.

CLA Speaker Champions Efficient Operations

By Wayne Miller

San Francisco, California—Approximately 70 guests listened to key speaker Norm Steffy, of Conestoga Wood Specialties Corp., during the Canadian Lumbermen's Association (CLA) Hardwood Bureau breakfast and meeting, held at the San Francisco Marriott. Additional photos on pages 12 & 14

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Jeff Lockey, Washington Alder, Mt. Vernon, Wash.; Nico Poulos, Weston Premium Woods Inc., Brampton, Ont.; Bob Uglow and Vince Catarella, Baillie Lumber Co., Hamburg, N.Y.; and Jim Howard, Atlanta Hardwood Corp., Mableton, Ga.

China FMC Show Holds Value For American Hardwoods

A Special Report By Di Nguyen

Shanghai, China—The ZOW show once played a much more prominent role among China's furniture tradeshows. However, the efforts of the growing show—FMC (Furniture Manufacturing & Supply Show)—have forced ZOW to change tactics. Now, ZOW has found a new niche to fill as FMC increasingly encroached on what ZOW once did. What is FMC? FMC's stated goal is to "meet domestic demand and

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Matt Gauvrit and Fritz Fehrensens, American Hardwood Industries, Cromwell, Conn.

Who's Who in Import/Exports



PAUL O. DOW

Paul O. Dow handles export and dimension sales, purchasing and trading for **Yoder Lumber Co. Inc.** in Millersburg, Ohio. Yoder Lumber Co. Inc. manufactures Red and White Oak, Poplar, Cherry, Hard and Soft Maple, Walnut and Ash (4/4 through 8/4 KD, 10/4, 12/4 and 16/4 green on lath, FAS/F1F, No. 1 and No. 2 Common). The company operates four

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PETER I. KENNEDY

Peter I. Kennedy is the general manager for **Fine Lumber & Plywood Inc.** in Austin, Texas. In his position, Kennedy handles sales, purchasing and production. Fine Lumber & Plywood Inc. manufactures custom mouldings, sells rough and milled hardwoods and supplies hardwood plywood and numerous other products for the cabinet industry. The company purchases

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ROBERT MACMASTER

Robert MacMaster is a sales representative for **Argo Fine Imports** in Metairie, La. Argo Fine Imports supplies a wide variety of fine imported plywood to distributors and laminators. The firm specializes in importing Lauan/Meranti, Hardboard, Virola, Sande, TECO-certified Elliotts Pine and also provides American Red Oak and Birch. Argo handles thicknesses from 2.7mm to 28mm.

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JORDAN S. MCILVAIN

Jordan S. McIlvain recently joined **Alan McIlvain Co.** in Marcus Hook, Pa., in sales. He began his career in the wood products industry two years ago, buying and selling Brazilian Hardwoods for Chesapeake Trading Group in Easton, Md. Alan McIlvain Co. specializes in Hardwood lumber, custom mouldings, millwork and quick turnaround for custom orders. The company has

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ITC Releases Flooring, Plywood Study

According to a recent study by the U.S. International Trade Commission (ITC), U.S. wood flooring and hardwood plywood industries have faced increasing competition from imports in recent years, particularly from China, which has become its most significant competitor. The study, "Wood Flooring and Hardwood Plywood: Competitive Conditions Affecting the U.S. Industries," was requested by the U.S. Senate Committee on Finance, and looked at U.S. production, consumption and trade of wood flooring and hardwood plywood between 2002 and 2007. According to the study, U.S. wood flooring consumption grew rapidly over the period studied, driven by strong demand from residential construction and remodeling and rising consumer preference for wood flooring relative to other types of flooring. Increased demand for hardwood plywood in some end uses, such as cabinetry and fixtures, was partially offset by weak demand in others (e.g., furniture). With the housing slowdown, which began in 2006, consumption of both products declined in 2007. U.S. imports increased faster than U.S. production as shifting preferences for prefinished flooring, exotic species and engineered wood flooring benefited imports more than domestic production. Combined global trade of wood floor-

THE WASHINGTON SCENE

ing and hardwood plywood increased by 80 percent with the United States and the top foreign suppliers (Brazil, Canada, China, Indonesia, Malaysia and Russia) accounting for more than three-fourths of global exports. Illegal logging contributed to increased production and consumption of these products. Major exporters have implemented measures designed to conserve and/or retain forest resources for their domestic producers, and major markets (e.g., the United States, the European Union and Japan), have either implemented or are developing policies to address illegal logging. "Wood Flooring and Hardwood Plywood: Competitive Conditions Affecting the U.S. Industries" will be available on the ITC's Web site at hot-docs.usitc.gov/pubs/332/pub4032.pdf. A CD-ROM of the report may be requested by e-mailing pubrequest@usitc.gov, calling 202-205-2000, or contacting the Office of the Secretary, U.S. International Trade Commission, 500 E Street SW, Washington, D.C., 20436. Requests may also be faxed to 202-205-2104.

Lacey Act Enforcement Delayed

The U.S. Department of Agriculture recently postponed the enforcement of new Lacey Act import declarations for wood furniture to July 1. Initial products affected by the amendments will be enforced beginning April 1. The Lacey Act, which prohibits trafficking of illegal wildlife, was amended this year to include a broader range of plant products to help combat illegal

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AHEC Introduces Responsible Procurement Policy (RPP) For Exports To Japan

For more information on AHEC and the export promotion programs, call (202)463-2720, fax (202)463-2787, or visit the website, www.ahec.org.

By Michael Snow
Executive Director
American Hardwood Export Council
Washington, D.C.



The AHEC Board of Directors has approved the implementation of an AHEC *voluntary* "Responsible Procurement Policy for Exporters" (RPP), which is specifically designed to address the Japanese requirements for green wood product procurement under the "Basic Policy on Green Purchasing". For the past 18 months, AHEC staff – along with substantial support from the U.S. Embassy in Japan and AHEC Past Chairman Peter King – have been working with the Japanese government and the Japanese Lumber Importers' Association to devise a mechanism for non-certified U.S. Hardwoods to be admitted under the policy. The attached document has been reviewed by both organizations who have tentatively agreed to accept this policy – in conjunction with the AHEC-funded Risk Assessment Study – as adequate for meeting Japanese demands for legally-sourced wood products. The final logistical details are being ironed out, but it appears likely that this document would not need to accompany every shipment to Japan, but rather each AHEC member who chooses to participate would provide a copy for their Japanese customers to keep on file. By way of background, the Basic Policy on Green Purchasing refers to a document formulated by the Japanese Forestry Agency which provides more detailed guidance on the verification of legality and the sustainability of wood and wood products. In contrast to some European government procurement policies, the Japanese Guideline is relatively short and lacking in detail. "Legality" in the context of wood products is defined

briefly as "harvested in a legal manner consistent with procedures in the forest laws." The Japanese Guideline does not seek to establish an operational definition of sustainable forest management. It is important to note, therefore, that this RPP pertains to Japanese requirements for legality only, and makes no claims related to sustainability. The Japanese Guideline allows three different mechanisms by which suppliers may verify legality:

- Forest certification and chain of custody systems;
- Codes of conduct of wood industry associations; and
- Self-established procedures of individual companies.

The AHEC RPP is designed to use option 2 above to meet the Japanese requirements. In practice therefore, the Japanese government has been highly flexible with regard to the forms of evidence it is willing to accept. By recognizing codes of conduct and other private sector initiatives, a great deal of responsibility has been passed on to the private sector. Over the coming months, AHEC plans to work in consultation with governments and wood importing and manufacturing federations around the globe in an effort to expand the use of this policy in other countries and regions. The American Hardwood Export Council (AHEC) is the leading international trade association for the U.S.

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Glut Of Unsold Homes Continues Threat On Lumber Industry

(The following is an edited version of an article first published in *The Seattle Times*)

Seattle, Washington—The glut of homes in foreclosure, vacant, or stuck on the market has the nation's lumber industry hanging on by a limb. Since housing starts hit their peak in mid-2005, demand for lumber used in floors, home frames, and cabinets has declined sharply, and experts say the number of unsold homes would need to significantly decrease before homebuilders commit to building new ones. With fewer new houses under construction, and foreclosure notices surging this summer, there's a lot at stake for the sawmills and loggers that feed the nation's dwindling appetite for floorboard, housing frames and cabinets. The industry, which employs more than 100,000 workers, has seen employment drop 13 percent the last three years, according to government data. Millions of private landowners that manage family-owned timberlands also depend on the lumber industry. Over the last year, lumber prices have been on 30-year lows. The brutal economics of the housing

crisis don't appear to be letting up, continuing to drag down demand for both hardwood lumber, for floors and cabinets, and softwood, used in home frames. The U.S. Commerce Department recently reported that groundbreaking for new homes in September was the second worse monthly total since 1959. It was January 1991 when the country - in a recession - saw lower housing starts. Construction of new homes and apartments dropped by 6.3 percent last month pushing the total production to a seasonally adjusted annual rate of 817,000 units. Owners of existing homes, meanwhile, are struggling to keep their property as housing values drop, unemployment rises, and financing options disappear. The number of homeowners caught in the foreclosure crisis grew by more than 70 percent in the third quarter of this year compared with the same period in 2007. Nationwide, nearly 766,000 homes received at least one foreclosure-related notice from July through September, up 71 percent from a year earlier, said foreclo-

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The New Lacey Act – Not Just About Wood Products

By Brent J. McClendon, CAE
Executive Vice President
International Wood Products Association



tries that environmentalists and domestic wood producers say they are targeting in this legislation. From another article posted on Green

New provisions of the Lacey Act expand penalty provisions to cover plants and products thereof, foreign and domestic, acquired in violation of resource laws. The provisions provide for criminal and civil penalties, as well as for the seizure and forfeiture of illegally obtained materials. This legislation moved through Congress as an anti-illegal logging bill directed at imports. But, there's more to the story. The definition of "plants and products thereof" is being looked at with a wide scope by the Administration. The government's perspective is to apply the new amendments to everything from a "2 x 4" to a bottle of Countrytime lemonade because it contains cellulose in its ingredients. Needless to say, importers of rayon clothing, lipstick, and a multitude of other products that contain plant material were caught by surprise. Mixed messages are in play as to whether the legislation was intended to cast such a wide net, or if it was just an oversight in drafting. The Congressional sponsors of the legislation responded to concerns voiced by several industries and issued guidance to the federal agencies to draw-

down the scope. Efforts are underway to parse the wording so the initial declaration requirements would be limited to items considered to be closer to the tree – logs, lumber, etc. IWPA suggests that it would be wrong to scratch some of these items off the list. We're a bit puzzled by the environmentalists and government officials who are giving a "pass" to industry sectors that import substantial amounts of material containing plant products. For example, rayon fiber, which is made from wooden pulp. Rayon apparel is imported into the United States and accounts for an unknown amount of logging. According to an environmental website, "Clothes made from rayon, Tencel, or acetate are made from a pure form of wood pulp, so it takes a lot of trees to make a relatively small amount of cloth. There's no recycled content in rayon." The article goes on to suggest that much of the rayon is sourced from developing countries. These are the same coun-



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FORECASTS2009!

John Beard
Beard Hardwoods
Greensboro, N.C.

I once had an employee that when you would ask him, "How are you doing?," he would always respond, "Come on Friday!" Well, I think if you asked anyone in our industry the question, "How are you doing?," the response would have to be, "Come on 2009!" At the time of this writing it's a week after the financial collapse of September, 2008 and there is more doom and gloom than I can ever remember in my professional lumber life. I believe that our industry is in the middle of a huge contraction cycle that may continue well into 2009. The question on many people's minds is who will be left standing when we find our way through this crisis.

I think that lumbermen by nature are eternal optimists. So, knowing this, I will be optimistic and say that 2009

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Dave B. Redmond
Highland Hardwood
Sales Inc.
Augusta, Ga.

As I sit at my desk putting my thoughts into words, I think it is important to note the date: October 8, 2008. All of us are just waiting for some positive signs or good news. It is difficult at best during these times to work on a business forecast for next week or month, much less next year! We are certainly in uncharted waters, as an industry, nation and indeed world. The stock market has declined drastically from its high, banks are closing or scrambling for life-lines, loans have gone from ridiculously easy to obtain to extremely difficult to obtain. The government is trying to improve the situation, so far to no apparent avail. The housing market is continuing to decline in volume of new starts, sales of existing homes, and in equity value.

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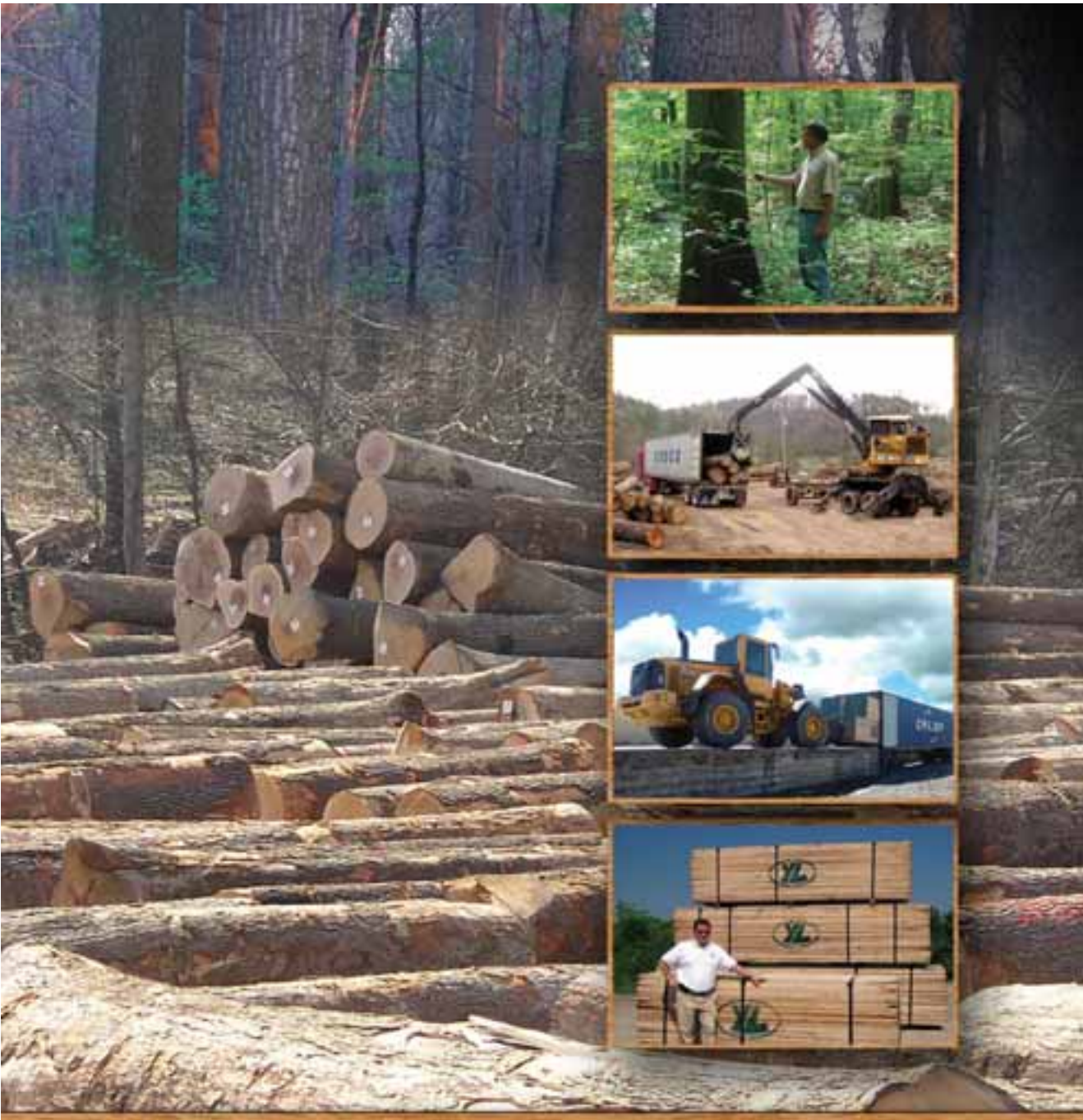
Doug Newman
Vice President
Newman Lumber Company
Gulfport, Miss.





Current economic times are a challenge with the uncertainty of the housing market looming and rising fuel prices. With leadership from the Federal Reserve and the U. S. Treasury, the housing market will come back and the uncertainties that loom will fade. The Fed has signaled its commitment to make the tough decision necessary to keep the economy moving. However, the bigger challenge to the Fed is to keep the housing problem from infesting the rest of the economy. The Fed will need to keep a close eye on the housing market to keep this from happening. If this does begin to happen, the Fed should act quickly to bolster the economy. The Fed's willingness to openly confront the current financial crisis in the housing market should lead to an upturn in the spring of 2008.


Another big question will be the political climate of the upcoming presi-


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Ruth Callender
W.M. Cramer
International Inc.
Hickory, N.C.

U.S. exports in 2009 will have several positive influences amid the turmoil of the world's financial markets. A lot will depend on whether the dollar strengthens against world currencies. The weaker dollar has been the main incentive for overseas manufacturers to purchase U.S. hardwoods even as freight has drastically increased.

The dampening of global fuel consumption has been another silver lining. Because with oil prices dropping, the freight increases seem to have finally stopped their weekly/monthly climb. More stable freight costs help both suppliers and buyers plan their product costs and purchases.

Changing world economies have altered exports with developing countries taking a bigger share of U.S. lum-

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Todd Webb
Domestic and
Export Sales
Jim C. Hamer
Kenova, W.VA.

We have reduced our annual production during 2008 and plan to maintain this level during 2009. Estimated production between 50 and 60 Million board feet or approximately 25 to 30% reduction from previous 8 years. This is our total green and kiln dried production which KD is expected to make up about 18 to 22 million feet of this total.

At this point we do not see the higher valued common & better items improving, such as Cherry, Oak, and Maple. Most all export markets are

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Oak And Alder Among JB WOODCRAFT’s American Imports

By Lucas Ngu



JB Woodcraft Inc. founder José Bituin poses with his wife Myrna Bituin at their facility in the Philippines.



North American Oak and Alder are used for the production of high quality solid wood furniture for the U.S. market.



JB Woodcraft’s forte lies in woodcarving and furniture design.



Gilding, which is used at JB Woodcraft’s facility, involves the application of a layer of gold over furniture parts.



Lamination involves putting sawn lumber pieces together for the production of larger furniture items.

Philippines, Betis Guagua—At JB Woodcraft Inc., furniture is very much a family affair with the furniture making operation involving the founder, José Bituin, his wife, Myrna, and four of their children. As president, José oversees the activities of the group with Myrna taking care of the finishing plant while two of their daughters are involved in the daily operations of the woodworking and manufacturing plant. In 1997, a chair manufacturing facility was set up and placed under the care of their son while their youngest daughter took charge of a veneer production facility.

For JB Woodcraft Inc., it all began in 1972 when José decided to set up a mill in the town of Betis, Guagua Pampanga province, which is known as a furniture manufacturing location and a two hour drive from the capital city of Manila. During the early days, the factory focused on the production of monkey pod wares for tourists. By 1980, it had progressed to become a furniture supplier to the American military personnel stationed at Subic and Clark Airbase.

The company’s big break came in 1986 when it took part in a furniture show at High Point Furniture Market in the United States. At the show, which was sponsored by the United Nations Development Program and the Product Development and Design Center of the Philippines, Myrna presented a buffet table with simple carvings that caught the attention of the big names like Paul Maitland Smith, Hickory Chairs, Casa Bique and Harden Furnitures.

From a little known 500m2 factory employing just five workers, the production facility of JB Woodcraft has expanded to cover an area measuring 8,000 m2 in size and employs a total of 350 workers.


Initially, furniture items were made mainly for the local market. Today, the company’s products are shipped to the USA, Russia, Europe, the Middle East and Japan. For the local market, its clientele includes modern housing developments and luxurious hotels.

In 1991, the eruption of Mt. Pinatubo forced the company to move its production facility to Tarlac, a three hour drive from the city of Manila.

“Over here, American timber accounts for some of what we use for the furniture production,” said José, who has moved back to the volcano-stricken town. The rest comprise local Mahogany, also known as Lauan and Gmelina, a plantation grown wood.

From the U.S., the company imports Oak and Alder, which are used for making classical items comprising chairs,

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THOMPSON MAHOGANY Updates Product Line With FSC *Eucalyptus Grandis*

By Paul Miller Jr.



Don Thompson, president of Thompson Mahogany Co., and Jim Larkey, decking and flooring sales, stand in front of some Ipe decking at the company's headquarters in Philadelphia, Pa.



Rob Nienaber handles lumber sales for the company.



Other key employees include Ken Berger, assistant yard manager; and John Ryan, yard manager.



Pictured is a mixed truckload of African Mahogany, Sapele and Ipe decking and flooring.



Ipe decking and Santos Mahogany flooring are shown packaged ready to be shipped to a customer.

Philadelphia, Pa.—Thompson Mahogany Co., headquartered here, has gained attention during the past year by importing and marketing a new Forest Stewardship Council (FSC) certified lumber product called Eucalyptus Grandis.

Thompson Mahogany is offering Eucalyptus Grandis in cooperation with Northland Forest Products, Kingston, N.H., and Lewis Lumber Products Inc., Picture Rocks, Pa. The three companies are importing the wood, and developing a market for it across the United States.

"The advantage of our Eucalyptus Grandis is that it's plantation grown, all of it inside a radius of about 20 miles," said Don Thompson, president of Thompson Mahogany.

"There are about 20,000 hectares in one area in northern Uruguay, on the Brazilian border. Since it is from one area, it is uniform in color, density and texture. It's also FSC certified, so it's a very good wood. It machines well and easily accepts stain."

Don said Eucalyptus Grandis is also a "wonderful alternative" to Swietenia Macrophylla Mahogany from Central and South America, which has declined steadily in availability for a number of years.

"The market response has been to seek alternatives to Swietenia," he said. "Those alternatives include African Mahogany, which has been considered a Genuine Mahogany for more than 100 years in the United States. You also have relatively new woods such as Sapele and Utile (Sipo) that have come into the market strongly in the last four or five years. Those woods are all furniture quality woods that can be used as alternatives for

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ROME A VENICE

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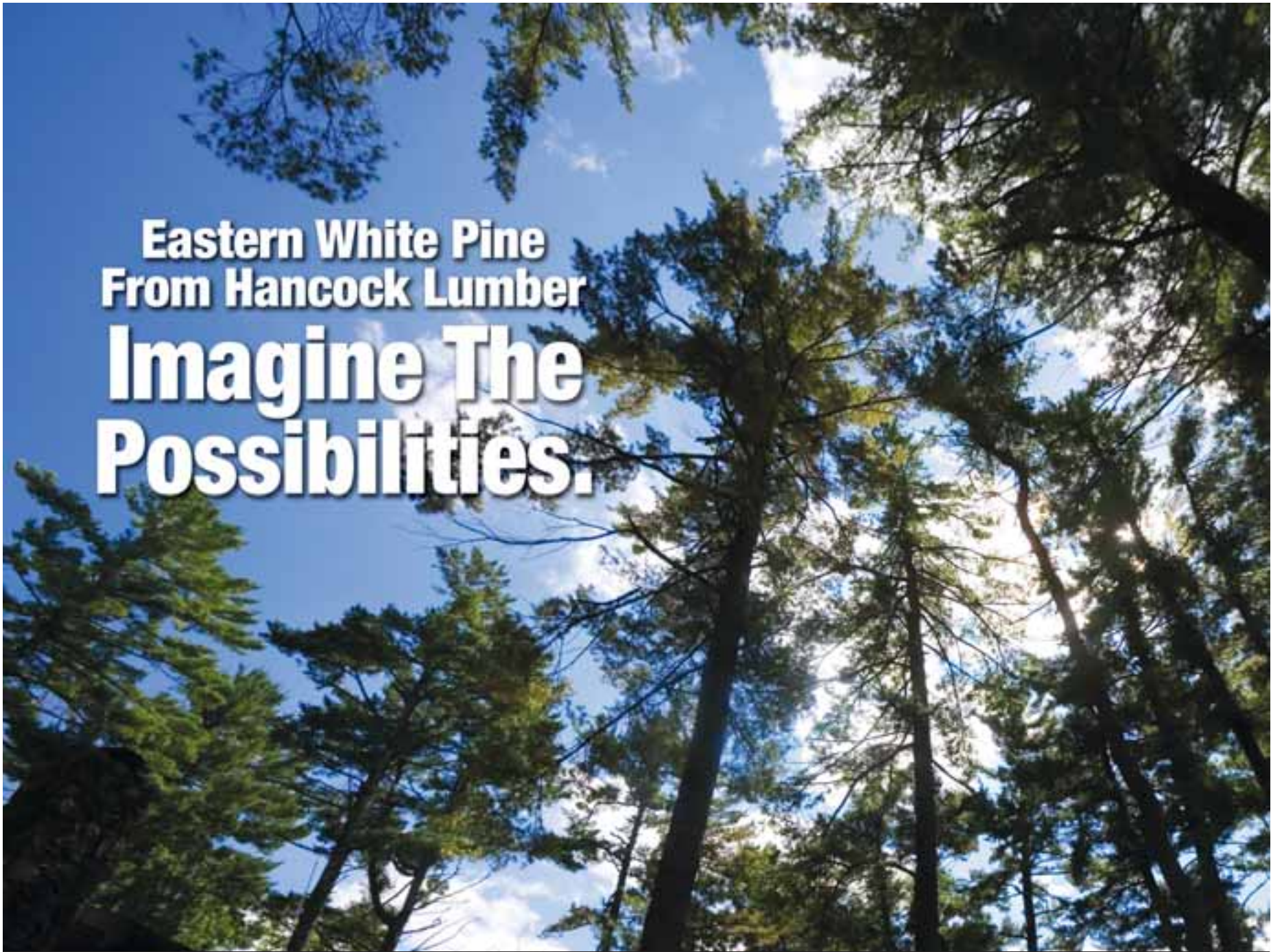
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This is a photo of Thompson Mahogany's lumber drying facilities in Philadelphia.

These are some lumber stacks of Zebrawood, one of many species offered by Thompson Mahogany Co.





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HERMITAGE HARDWOOD Stays Competitive Internationally

By Terry Miller



Parker Boles, president and chief executive officer, and Lawson Maury and Steve Gunderson, who work in sales, stand with a bundle of lumber ready for shipment.



Tracy Clark and Wilma Love keep Hermitage Hardwood's office in Cookeville, Tenn., running smoothly.



Lumber is inspected and marked for grade and remanufacture request at the new sorting line.



Hermitage's recent addition of an automated package maker handles larger volume runs.



Small percentage products and specialty sort items are packaged at the pull chain.



A package of surfaced Hickory at the Picture Tally is weighed and tallied prior to end painting.

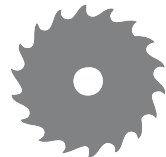
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Cookeville, Tenn.—Approaching their 30th anniversary in 2009, Hermitage Hardwood continues to evolve with the times. In an age where the only constant is change, the company continues to make capital improvements to assure quality, efficiency and consistency.

Founded in 1979 by Parker Boles, company president and chief executive officer, Hermitage began as a wholesale lumber business and evolved into a global supplier of hardwood lumber. Boles attributes his success to being proactive, which has provided a positive rate of growth. Boles states that he could see globalization taking place and knew that gaining efficiency and increasing production would ultimately be the way to remain competitive in the domestic and international markets. “With continued pressure on margins, we felt it was necessary to gain more production with our existing manpower,” Boles said.

This past spring, Hermitage added a new material handling system. Boles explained the efficiency of this new system.

“By integrating three workstations into one with automated scanning technologies, we are able to combine inspection, trimming and sorting into one major production line,” Boles said. “For our customers that request more specific width sorting, we are able to sort to their request or we can program the system to pull any per-

Continued on page 21

Junior Kessler, lumber procurement manager, examines inbound green lumber at the stacker.



Grading Chain Expands SALEM FRAME’s Global Efforts



Kenneth Cox, plant manager, Salem Frame Co. Inc., Salem, Va.; Stefanie Lucas, president and chief executive officer, Rowe Fine Furniture Inc., Elliston, Va.; and Scott England, who is in charge of lumber sales at Gilco Lumber Inc., South Charleston, W.Va.



Tim Worrell, lumber specialist, and Kenneth Cox, Salem Frame Co. Inc., Salem, Va., and Scott England, Gilco Lumber Inc., South Charleston, W.Va., help put the two boards together into one, which symbolizes the partnership that now exists between Salem Frame and Gilco Lumber Inc.



Scott England, Gilco Lumber Inc., South Charleston, W.Va.; Tim Worrell, Salem Frame Co. Inc., Salem, Va.; and Tony Love, Gilco Lumber Inc.



Kenneth Cox, Eric Collins, engineering manager, and Tim Worrell, Salem Frame Co. Inc., Salem, Va.; and Keith Peek, McDowell Mechanical Service, Marion, N.C.



Charles Serber, left, handles tallies, ships containers overseas and works as a backup lumber grader for Gilco Lumber Inc. at Salem Frame’s Salem, Va., facility. Art Borders, Gilco Lumber Inc., is based out of Cabin Creek, W.Va.



Gary Wilson, custom kiln drying coordinator, Eric Collins, and Darrell Cannaday, lumberyard supervisor, Salem Frame Co. Inc., Salem, Va.

Salem, Virginia—Salem Frame, a business unit of Rowe Fine Furniture, recently solidified its position as a one-stop, full-service lumber drying and grading facility by opening the Roanoke Valley’s only lumber grading chain here.

Lumber from around the country will arrive at Salem Frame for its final preparation before being packaged and shipped around the world. Final preparation includes kiln drying, grading, trimming, ripping and packaging. Prior to the installation of the grading chain, Salem Frame’s custom kiln drying yard was only able to offer lumber customers one particular service, kiln drying freshly cut lumber.

Lumber, which is now able to be processed at Salem Frame, is likely to be shipped around the country and the world and used for furniture, home construction, wine barrels, interior wall

Continued on page 22



Justin True is a lumber grader for Gilco Lumber Inc., headquartered in South Charleston, W.Va., and he is based at Salem Frame in Salem, Va.

John Stanley, senior vice president of operations, Ben Jarrell, director of human resources, and Mark Freitas, chief financial officer, Rowe Fine Furniture, Elliston, Va.



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NHLA PHOTOS - Continued from page 1



Larry Randall, Better Built Dry Kilns Inc., Villa Hills, Ky.; Kari Ort-Bunting, Wolf River Lumber Inc., New London, Wis.; Ralph Bartles, Graf Brothers Lumber Co., South Shore, Ky.; and Chris Randall, Better Built Dry Kilns Inc.



Todd Webb and Jack Hatfield, Jim C. Hamer Co., Kenova, W.Va.; and Eric Porter, Abenaki Timber Corp., Kingston, N.H.



Doug Newman, Newman Lumber Co., Gulfport, Miss.; Kameron Shannon, Mitchell Forest Products Inc., Simi Valley, Calif.; Duane Roth, Contact Industries, Clackamas, Ore.; and Bill Rogers, Newman Lumber Co.



Todd Nelson, Thompson Appalachian Hardwoods Inc., Huntland, Tenn.; Paul Gates and Walt Lancaster, Tradelink Wood Products Inc., Greensboro, N.C.; and Barry Hodges, Thompson Appalachian Hardwoods Inc.



Romel Bezerra, Aljoma Lumber Inc., Medley, Fla.; Suzette Covalt, O'Shea Lumber Co., Glen Rock, Pa.; Claus Staalner, WoodEye North America Inc., Norcross, Ga.; and Shawn Colvalt, O'Shea Lumber Co.



Rod McGraw, Wieland & Sons Lumber Co., Winthrop, Iowa; Wilfrid Burnett, Gestion Wilfrid Brunet Inc., Cheneville, Que.; Delbert Thompson, Wieland & Sons Lumber Co.; Karl Christensen, Coulee Region Hardwoods Inc., Bangor, Wis.; and Scott Anderson, Team Hardwoods, Duluth, Minn.



Paul Brooks and Roy Reif, Quality Hardwoods Ltd., Powassan, Ont.; Dennis Cuffley, J.D. Irving Ltd., Clair, N.B.; and Mark Horne and Mark Barford, NHLA, Memphis, Tenn.



Dan Caldwell, Atlanta Hardwood Corp., Mableton, Ga.; Patrick Altham, AHC Export Group, Huntersville, N.C.; Tim McGill, DLH Nordisk Inc., Greensboro, N.C.; and Brian Ballard, Huntersville Hardwoods Inc., Huntersville, N.C.



Ron Nentwig, Northland Corporation, LaGrange, Ky.; Sally Johnson, Batey Ltd., Mt. Pleasant, Iowa; Wendell Cramer, W.M. Cramer Lumber Co., Hickory, N.C.; and John Patterson, Begley Lumber Co., London, Ky.



Mike and Lisa Meiser, Bingaman & Son Lumber, Kreamer, Pa.; Bo Hammond, Coastal Lumber Co., Charlottesville, Va.; and Terry Smith, Coastal Lumber Co., Weldon, N.C.



Parker Boles, Hermitage Hardwood Lumber Sales Inc., Cookeville, Tenn.; Jim Reader, Downes & Reader Hardwood Co. Inc., Stoughton, Mass.; and Charlie Craig, Craig Lumber Corp., Collierville, Tenn.



Phill Rosebrock, Prime Lumber Co., Thomasville, N.C.; and Sven Melbo and Jack Clark, North Pacific Group, Portland, Ore.



Melodee Yaley, Batey Ltd., Mt. Pleasant, Iowa; Chip Dickinson, Anderson-Tully Lumber Co., Memphis, Tenn.; Pat Abney, Anderson-Tully Lumber Co., Alexandria, La.; Jane Fleming-Mathias, Batesville Casket Co., Batesville, Ind.; and Stan Morgan, Anderson-Tully Lumber Co., Vicksburg, Miss.



Gil Thurm, Hardwood Manufacturers Assoc., Pittsburgh, Pa.; and Kevin Gillette and Randy Bowers, Tioga Hardwoods Inc., Owego, N.Y.



Ed White, Wagner Hardwoods, Cayuta, N.Y.; Scott Holley, Industrial Timber & Lumber Corp., Beachwood, Ohio; Bob McCabe, Bingaman & Son Lumber Co. Inc., Kreamer, Pa.; and Scott Cummings, Cummings Lumber Co. Inc., Troy, Pa.



Jeff Meyer, Baillie Lumber Co., Hamburg, N.Y.; Reinier Taapken, Salamanca Lumber Co. Inc., Salamanca, N.Y.; and Pat Burke and Peter James, Timber World, U.K.



John Hawkinson, Hawkeye Forest Products Inc., Boise, Idaho; Mista Feist, Holmes & Co. Inc., Columbia City, Ind.; Marcus Hawkinson, and Jennifer Geiger and Tony Geiger, Hawkeye Forest Products Inc.; and Stan Smith, Midwest Walnut Co., Willow Springs, Mo.



Chris Moore, Bob Miller and Tim Leyden, Frank Miller Lumber Co. Inc., Union City, Ind.; William J. Crowley, Crowley Hardwoods, Ennis, Ireland; and Tony Orta, Frank Miller Lumber Co. Inc.



Guy Genest, Primewood Lumber Inc., Drummondville, Que.; Toto Robinson, Robinson Lumber Co., Inc., New Orleans, La.; Walt Lancaster, Trade Link Wood Products Inc., Greensboro, N.C.; and John Beard, Beard Hardwoods Inc., Greensboro, N.C.



Dave Doucette, Rex Lumber Co., Acton, Mass.; Richard and Barbara Conti and Jack Matson, Matson Lumber Co., Brookville, Pa.; and Jay Bishop, OrePac, Fresno, Calif.



Tom Johel, U-C Coatings Corp., Buffalo, N.Y.; Brian Walsh, Cherry Forest Products, Guelph, Ont.; Mike Price, Forestry Systems Inc., Summerfield, N.C.; and Dennis Reid, Cherry Forest Products



Bob Moody and Larry Mether, Midwest Walnut Co., Council Bluffs, Iowa; David Townsend, Breeze-Dried Inc., Tillsonburg, Ont.; Gene Almendinger, Holmes & Co. Inc., Columbia City, Ind.; and Stan Smith, Midwest Walnut Co., Willow Springs, Mo.



John Brown, Pike Lumber Co. Inc., Akron, Ind.; Brent McClendon, International Wood Products Assoc., Alexandria, Va.; Larry Frye, American Walnut Manufacturers Assoc., Zionsville, Ind.; Mark Barford, NHLA, Memphis, Tenn.; and Joe Snyder, Fitzpatrick & Weller Inc., Ellicottville, N.Y.



Chris Kilibarda, Seaboard International, Nashua, N.H.; and Michael Hilburn, TMX Shipping Co., Wilmington, N.C.

Industry’s Future Topic Of Global Buyers Mission

By Wayne Miller



Dennis Wight, Pacific Western Wood Works Ltd., Delta, B.C.; Gary Knight and Randy Brown, R.B. Lumber Co., Oregon City, Ore.; and Ian Wight, Pacific Western Wood Works Ltd.



Brian Hawrysh, BC Wood Specialties Group, Langley, B.C.; and Cornelius Grimm, Grimm International, Jesteburg, Germany



Ben Good and Mike Booth, Woodtone, Chilliwack, B.C.; and Kris Johnson, Shelter Products Inc., Daphne, Ala.



Curtis Walker, Ben Meachen, Stewart Clark, The Waldun Group, Maple Ridge, B.C.; and Francis Yau, Andrew Cheung Architects Inc., Vancouver, B.C.



Julie McLean, Spruceland Millworks Inc., Acheson, Ala.; Randi Walker, BC Wood Specialties Group, Langley, B.C.; and Mary McInnes, Lawrence R. McCoy & Co. Inc., Bellingham, Wash.



Rob Marusic, Downie Timber Ltd./Selkirk Specialty Wood Ltd., Revelstoke, B.C.; Harvey Rebalkin, Department of Foreign Affairs and Internal Trade, Vancouver, B.C.; Jim Sheehan, Consulate General of Canada, Seattle, Wash.; and Joseph Yong Thiam Woon, Cintara Resources, Petaling Jaya, Malaysia

Whistler, British Columbia– Attendees, exhibitors and guests at the recent BC Wood 2008 Global Buyers Mission (GBM), presented by BC Wood Specialties Group and gov-
Continued on page 23



Brett Johnson, Dakeryn Industries Ltd., North Vancouver, B.C.; Gary Reid, Westshore Specialties Ltd., Delta, B.C.; Ian Wight, Pacific Western Wood Works Ltd., Delta, B.C.; and Chris Sainas, Dakeryn Industries Ltd.



Irwin Sidana and Ash Appadurai, Chateau Designs Inc./Sunrise Kitchens, Surrey, B.C.; Peter Sperlich, Sperlich Log Construction Inc., Enderby, B.C.; Fred Spoke, Canada Wood China, Shanghai, China; JC Lee, BC Wood Specialties Group, Kangwon-Do, Korea; and Jim Ivanoff, BC Wood Specialties Group, Tokyo, Japan.



Peter Raja and Derek Ruff, Norelco Cabinets Ltd., Kelowna, B.C.; Doug Auer, BC Wood USA, Lake Tahoe, Wash.; and Glen Webb, Canada Mortgaging Housing Corp., Vancouver, B.C.

Larry Davis, Ecosip Industries Inc., Duncan, B.C.; Greg Schelanburg, Spruceland Millworks, Ackeson, Alb.; Victor Santisteban, Advance Lumber Remanufacturing Ltd., Surrey, B.C.; and Brian Jenkins, Longhouse Trading Co. Ltd., Qualicum Beach, B.C.



Additional photos on page 16



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Email: barryyuhas@salamancaalumber.com



NHLA PHOTOS - Continued from page 10



Romel Bezerra, Aljoma Lumber Inc., Medley, Fla.; Paul and Denise Dow, Yoder Lumber Co., Millersburg, Ohio; and Alfredo Hernandez, Aljoma Lumber Inc.



Lee Stitzinger, BWP Hardwoods Inc., Brookville, Pa.; Denis Leblanc, Primewood Lumber Inc., Drummondville, Que.; and Gina and Ray Wheeland, Wheeland Lumber Co., Inc., Liberty, Pa.



Judd Johnson, Hardwood Market Report, Memphis, Tenn.; Steve Gunderson, Hermitage Hardwood Lumber Sales, Cookeville, Tenn.; and Suzanne and Paul Jukes and Jon Swanson, American Lumber Co., Hamburg, N.Y.



Loren Voyer, Champlain Hardwoods Inc., Essex Junction, Vt.; Craig Devereaux and Rob Kokowski, Devereaux Sawmill Inc., Pewamo, Mich.; and Joe Zona, Deer Park Lumber Co., Tunkhannock, Pa.

IWPA PHOTOS - Continued from page 1



Mike Malin, Midwest Hardwood Corp., Maple Grove, Minn.; Jim Bilinski, J.E. Higgins Lumber Co., Livermore, Calif.; and Patrick Gillespie, Midwest Hardwood Corp.



Stan Morgan, Anderson-Tully Lumber Co., Vicksburg, Miss.; Clay Curtner, Curtner Lumber Co., Newport, Ark.; Ted Rowe Jr., UCS Global Forest Products, Mississauga, Ont.; and Bob Mitchell, Mitchell Forest Products Inc., Simi Valley, Calif.



Orn Gudmundsson Jr., Northland Corp., LaGrange, Ky.; Brent McClendon, International Wood Products Assoc., Alexandria, Va.; and David Caldwell, Hardwood Market Report, Memphis, Tenn.



Jesper Bach, Baillie Lumber Co., Hamburg, N.Y.; Gary Miller, Import/Export Wood Purchasing News, Memphis, Tenn.; and Bob Smith, Thompson Mahogany Co., Philadelphia, Pa.



Michael Snow, American Hardwood Export Council, Washington, D.C.; and Toto and Wesley Robinson, Robinson Lumber Co. Inc., New Orleans, La.



Doug Newman, Newman Lumber Co., Gulfport, Miss.; and Jim Reader, Downes & Reader Hardwood Co. Inc., Stoughton, Mass.



Christian Mengal and Tim McGill, DHL Nordisk Inc., Greensboro, N.C.; Brent McClendon, IWPA, Alexandria, Va.; Cameron Caudill, Phillips Plywood, Pacoima, Calif.; and Patrick Gillespie, Midwest Hardwood Corp., Maple Grove, Minn.



Norman and Carol Roberts, Roberts Plywood Co., Deer Park, N.Y.; Bob Mitchell, Mitchell Forest Products Inc., Simi Valley, Calif.; Bill Rogers, Newman Lumber Co., Gulfport, Miss.; and Paul Gates, Tradelink Wood Products Inc., Greensboro, N.C.



Geoff Dodd, Africal, Collierville, Tenn.; William von der Goltz, Downes & Reader Hardwood Co. Inc., Greensboro, N.C.; Ed Downes, Downes & Reader Hardwood Co. Inc., Stoughton, Mass.; and Steve Arnett, Downes & Reader Hardwood Co. Inc., Greensboro, N.C.



Norman Murray, U-C Coatings Corp., Buffalo, N.Y.; Kenneth Tan, FDM, Singapore, Asia; and Christian Mengal, DLH Nordisk Inc., Greensboro, N.C.



John Patterson, Begley Lumber Co., London, Ky.; Tom Herga, Inter-Continental Hardwoods, Currie, N.C.; Brent McClendon, IWPA, Alexandria, Va.; and Wayne Miller, Import/Export Wood Purchasing News, Memphis, Tenn.



Dave Doucette, Rex Lumber Co., Acton, Mass.; Richard Conti, Matson Lumber Co., Brookville, Pa.; and Bill McCauley, Weyerhaeuser Hardwoods & Industrial Products, Orchard Park, N.Y.

CLA PHOTOS - Continued from page 1



Patrick Goodfellow, Goodfellow Inc., Delson, Que.; Dave Williams, Champlain Hardwoods Inc., Essex Junction, Vt.; and Stephane Arbour, Les Boise J.M. Arbour Inc., Shawinigan, Que.



Loren Voyer, Champlain Hardwoods Inc., Essex Junction, Vt.; Stephanie Van Dystadt, DV Hardwoods Inc., Bassett, Que.; Jim Von Tellrop, Paladeau Inc., Placerville, Calif.; and Scott Anderson, Team Hardwoods, Duluth, Minn.



Orn Gudmundsson Sr., Northland Corporation, LaGrange, Ky.; and Claude Cadrin, C.A. Spencer Inc., Laval, Que.



Peter Van Amelsfoort, Quality Hardwoods Ltd., Powassan, Ont.; Eric Porter, Abernaki Timber Corp., Kingston, N.H.; and Norm Murray, U-C Coatings Corp., Buffalo, N.Y.



Chris Castano, Champlain Hardwoods Inc., Essex Junction, Vt.; Karl Seger, Falcon Lumber Ltd., Toronto, Ont.; Raymond Langelier, Langelier Lumber Ltd., Montreal, Que.; Brin Langmuir, Falcon Lumber Ltd.; and Norm Steffy, Conestoga Wood Specialties Corp., Beavertown, Pa.



Michael Buckley, Turnstone Communications, Singapore, China; Randy Bowers and Kevin Gillette, Tioga Hardwoods Inc., Owego, N.Y.; and Norb Bennett, Trumco Inc., Atlantic, Pa.



Chip, Scott, Kim and Roy Cummings, Cummings Lumber Co. Inc., Troy, Pa.



Paul Brooks and Roy Reif, Quality Hardwoods Ltd., Powassan, Ont.; Dennis Cuffley, J.D. Irving Ltd., Clair, N.B.; and Mark Horne and Mark Barford, NHLA, Memphis, Tenn.

Additional photos on page 14

NHLA -
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Francisco Marriott.

The Lumbermen's Underwriting Alliance presented this year's convention, sponsored annually by the National Hardwood Lumber Association (NHLA), which attracted 857 people.

Approximately 66 exhibitors displayed their products in the Exhibit Showcase, sponsored by TradeTec Computer Systems Ltd., and Trader's Alley, sponsored by AVA Company. There was also plenty of time allotted for networking and sharing ideas with industry representatives.

In addition to a new event, an International Buyer Meet and Greet, the Hardwood Forest Foundation's "Truth About Trees," presented by MacBeath Hardwood Company and Sweeney Hardwoods, returned for a second year. The Women's Network received a unique opportunity for a private Breakfast Fashion Show from Bloomingdale's West Coast flagship store. Cole Hardwood Inc. sponsored an "Under 40 Reception" for up-and-coming industry leaders to meet with members of the NHLA staff.

Related events included a retirement reception for the American Walnut Manufacturers Association's Larry Frye.

Attendees took advantage of several educational seminars including: "The Economy and the Hardwood Industry" with presenters Lynn Michaelis, Weyerhaeuser's chief economist and vice president, George Barrett, Weekly Hardwood Review editor, and Michael Buckley, president of Turnstone Communications (Singapore); and "Certification of Hardwoods" with presenters Jason Metnick of the Sustainable Forestry Initiative, Jason Grant of the Forest Stewardship Council, Al Goetzl, president of Goetzl and Associates in Washington, D.C., and Rupert Oliver, timber and economics consultant of the American Hardwood Export Council.

Jack English, national inspector, led a grading seminar, while Mark Horne, NHLA chief inspector, presided over a rules open forum. International markets breakout sessions were directed by John Chan, director for Greater China and Southeast Asia, American Hardwood Export Council (AHEC), on Asia; and Rod Wiles, AHEC, John Reed Jr., American Hardwood Industries, and Buckley, on Europe and India/Middle East.

Honored guest speakers at the NHLA Convention included Karl Rove, who served as Deputy Chief of Staff and Senior Advisor to President Bush; and Chuck Leavell, a respected author, industry representative and musician, who has toured with the Rolling Stones since 1982.

The three-day convention was also packed with numerous meals and receptions for industry associations; musical performances by Leavell and Night Fever, which was sponsored by Atlanta Hardwood Corporation and Sweeney Hardwoods; a golf tournament sponsored by North Pacific; and optional tours of the city of San Francisco, Alcatraz, Muir Woods, Sausalito and the Golden Gate Bridge.

The Hardwood Forest Foundation, Canadian Lumbermen's Association, Hardwood Federation PAC, American Walnut Manufacturers Association, International Wood Products Association, Hardwood Distributors Association and the Fellowship of Christian Lumbermen all held membership meetings or other social gatherings during the conference.

Next year's NHLA Convention is scheduled for Sept. 30 through Oct. 3 in Boston, Mass., at the Sheraton Copley.

IWPA -
Continued from page 1

the current market conditions.

Among the topics discussed was the Lacey Act, about which Brent McClendon, executive vice president of IWPA, said he welcomes the Lacey Act because it settles the question of legality in regard to imported wood products. McClendon encouraged attendees to embrace the new legislation and to be especially diligent in regard to the documentation requirements of the Act.

"This documentation will require that you list all the species that may be in your shipment and all the countries from which the wood is harvested," McClendon said. He

added that the IWPA has developed purchase order disclaimer language to give "you some contractual coverage against any lawsuits that may occur."

McClendon also touched on the fact that more in-depth background checks at U.S. ports are expected. "There is another issue on port security," he said. "It's the 10-plus-2 rule. You have to list each manufacturer of the products being shipped."

"What this rule does," added McClendon, "is it protects you against over zealous organizations that like to get all the information they can about your shipments. But this rule give you complete privacy and guards against undue disclosures."

The IWPA is the leading international trade association for the North American imported wood products industry. IWPA represents 220 companies and trade associations engaged in the import, manufacture and North American distribution of hardwoods and softwoods from sustainably managed forests.

HMA -
Continued from page 1

during a recent Northeastern regional meeting.

Jane Difley, president/forester for the Society for the Preservation of New Hampshire Forests, addressed the group about "Conserving the Forest Reserve." Difley discussed ways that New Hampshire's oldest and largest land trust works with landowners, foresters and log-

gers to protect the working forests that generate the wood resource that supports the forest economy.

Attendees also toured several facilities, including Abenaki Timber Corp., Northland Forest Products Inc., Holt & Bugbee Co., New England Wood Pellet, HHP Inc. and the Society for the Protection of New Hampshire Forests.

The HMA also hosted a dinner and reception during the two-day meeting.

The Hardwood Manufacturers Association is a member-driven association, providing member companies with peer networks, state-of-the-art information, 21st Century management tools and American hardwood promotion campaigns. The HMA offices are located in Pittsburgh, Pa. For more information, call 412-829-0770.

CLA -
Continued from page 1

in conjunction with the recent 111th National Hardwood Lumber Association's Annual Convention at the San Francisco Marriott.

Steffy's speech, entitled "Wastefulness Has Never Been An Option," focused on shifting markets, industry trends, procurement opportunities, staying agile in a smaller market, and looking further up the resource stream to encompass supplier integration.

Conestoga manufactures components for the kitchen and bath industry primarily and

purchases 32 million board feet of hardwoods annually. Steffy said that his firm continues to see "weak building products marketed for nonstructural interior obligation products, like cabinets, flooring, millwork and staircases. Commercial construction is the one bright spot," but that has declined in recent weeks.

Steffy said Hard Maple remains the top seller for his company, and Alder is strong as well. He added that he's seen an increased interest for Walnut and darker stains. "Simple and contemporary designs with square raised panels, flat panel doors and matching grain" are desirable, as is "the rustic look with more character, which is Alder and Cherry," he said.

In cabinetry, the trend is more about paint than anything, Steffy said. Now, it's more about form, function and finish rather than the wood species that is used. Today, the designer chooses a species more on how it looks with the finish or with the stain than how it looks with the natural clear coat.

Steffy said that in regard to production, cabinetmakers are seeing reduced lead times while component manufacturers are experiencing shorter lay times and just-in-time deliveries. He added that suppliers are helping their customers manage their inventories.

Trends to watch for, according to Steffy are: consumer and builder demand; cabinet and component imports; a slowdown in China's production; change in the volume of export components, lumber and logs; and lastly, a definite growth in the green movement.

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CLA PHOTOS - Continued from page 12



Chuck Beatty, Gutchess Lumber Co., Cortland, N.Y.; Sam Glidden, GMC Hardwoods Inc., Dover, Mass.; Ted Murray, Murray Bros. Lumber Ltd., Madawaska, Ont.; Art Nelson, Weston Premium Woods, Brampton, Ont. and Wayne Miller, Import/Export Wood Purchasing News, Memphis, Tenn.



Dennis Carrier, Kennebec Lumber Co., Solon, Maine; Natalie Crane, HHP Inc., Henniker, N.H.; and Fred Doane, Northland Forest Products Inc., Kingston, N.H.



Phil and Roger Pierce, Holt & Bugbee Co., Tewksbury, Mass.; and Steve French, Abenaki Timber Corp., Kingston, N.H.



Hue Haley, McDonough Manufacturing Co., Eau Claire, Wisc.; Pem Jenkins, Turn Bull Lumber Co., Elizabethtown, N.C.; and Phil Pierce, Holt & Bugbee Co., Tewksbury, Mass.



Gil Thurm, HMA, Pittsburgh, Pa.; Parker Boles, Hermitage Hardwood Lumber Sales Inc., Cookeville, Tenn.; Eric Porter, Abenaki Timber Corp., Kingston, N.H.; and Tim Kuhns, Kuhns Brothers Lumber Co. Inc., Lewisburg, Pa.



Tim Kuhns, Kuhns Bros. Lumber Co. Inc., Lewisburg, Pa.; Tom Armentano, Sirianni Hardwoods Inc., Painted Post, N.Y.; and Rod Weaver, Dick Kordez and Mark Bittner, Kuhns Bros. Lumber Co. Inc.

HMA PHOTOS - Continued from page 1



Dave Marshall, American Hardwood Industries Inc., Cromwell, Conn.; Dave Paige and Dan Harrison, Cersosimo Lumber Co. Inc., Brattleboro, Vt.; and Jeff Hanks, Bill Hanks Lumber Co. Inc., Danbury, N.C.



Richard Carrier, HHP Inc., Henniker, N.H.; Deborah Hawkinson, Hardwood Federation, Washington, D.C.; Norman Langlois, PHL Industries Inc., St. Ephem-de-Beauce, Que.; and Jimmy Jones, J.E. Jones Lumber Co., New Bern, N.C.



Jameson French, Northland Forest Products, Kingston, N.H.; Terry Brennan, president, Hardwood Manufacturers Assoc. (HMA), Baillie Lumber Co., Hamburg, N.Y.; and Jim Woodberry, PW Hardwood LLC, Brookville, Pa.



Phil Mann, Cersosimo Lumber Co. Inc., Brattleboro, Vt.; Luann Lafreniere, New England Wood Pellet LLC, Acton, Mass.; Eric Porter, Abenaki Timber Corp., Kingston, N.H.; Michael Cersosimo, Cersosimo Lumber Co. Inc.; and Tony Messina, Frank Miller Lumber Co. Inc., Union City, Ind.



Michael Cersosimo, Cersosimo Lumber Co. Inc., Brattleboro, Vt.; Lee Stitzinger, BWP Hardwoods Inc., Brookville, Pa.; Scott Ferland, Cersosimo Lumber Co. Inc., Brattleboro, Vt.; Drew Helms, PW Hardwood LLC, Brookville, Pa.; and Terry Miller, Import/Export Wood Purchasing News, Memphis, Tenn.



Skipper Beal, Beal Lumber Co. Inc., Little Mountain, S.C.; Jared Fowler, Emporium Hardwoods, Emporium, Pa.; Linda Jovanovich, HMA, Pittsburgh, Pa.; Dave Marshall, American Hardwood Industries Inc., Cromwell, Conn.; and Keith Snider, Graham Lumber Co. LLC, Linden, Tenn.



Dan Matthews, SII Dry Kilns, Lexington, N.C.; Deborah Hawkinson, Hardwood Federation, Washington, D.C.; Scott Cummings, Cummings Lumber Co. Inc., Troy, Pa.; Tina Radigan, Abenaki Timber Corp., Kingston, N.H.; and Gil Thurm, Hardwood Manufacturers Assoc., Pittsburgh, Pa.



Mark Williams, Jerry G. Williams & Sons Inc., Smithfield, N.C.; Jeff Hanks, Bill Hanks Lumber Co. Inc., Danbury, N.C.; and Scott Shaffer, Bingaman & Son Lumber Inc., Kreamer, Pa.



Adam Calvert, Dwight Lewis Lumber Co., Hillsgrove, Pa.; Lise Lennon and Bruce Horner, Abenaki Timber Corp., Kingston, N.H.; and Marc Lewis, Dwight Lewis Lumber Co.



Russ D'Elia, HHP Inc., Henniker, N.H.; Bill Collins, Holt & Bugbee Co., Tewksbury, Mass.; Jim Howard, Atlanta Hardwood Corp., Mableton, Ga.; Jane Difley, guest speaker, Society for the Protection of New Hampshire Forests, Concord, N.H.; and Parker Boles, Hermitage Hardwood Lumber Sales Inc., Cookeville, Tenn.



Peter McCarty, McDonough Manufacturing Co., Eau Claire, Wis.; Luke Brogger, Quality Hardwoods Inc., Sunfield, Mich.; and Rob Kittle, McDonough Manufacturing Co., Eau Claire, Wis.



Skipper Beal, Beal Lumber Co Inc., Little Mountain, S.C.; Gordon McIlvain, Alan McIlvain Co., Marcus Hook, Pa.; Dave Marshall, American Hardwood Industries Inc., Cromwell, Conn.; and Andy Godzinski, Rex Lumber Co., Acton, Mass.



Jim Howard, Atlanta Hardwood Corp., Mableton, Ga.; and Marc Kendrew and Dennis Carrier, Kennebec Lumber Co., Solon, Maine



Matt Begley, Begley Lumber Co. Inc., New London, Ky.; Dave Doucette, Rex Lumber Co., Englishtown, N.J.; and John Patterson, Begley Lumber Co. Inc.

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CLA -

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Steffy offered tips to improve operations, such as consider how a company can achieve a balance between production costs and customer demand that effects inventory reduction. He also addressed resources, noting the value of optimization and scanning technology and purchasing materials on a yield basis.

The guest speaker predicted a five to 10 percent market decline in 2009 in the kitchen and bath industry and that the current industry crisis should level off in the third and fourth quarters of next year.

The CLA Hardwood Bureau breakfast opened with remarks from Peter Van Amelsfoort. Later, Jean-Francois Houde provided a brief report on the association's membership, followed by a report by NHLA Executive Director Mark Barford.

The CLA will host its annual convention in Toronto at the Sheraton Centre Toronto Hotel, Feb. 18-19. For more information, phone 613-233-6205 or email terri-lee@cla-ca.ca.

AHEC -

Continued from page 1

derive from legal and well managed forests.

AHEC circulated a study on the competitive impacts of illegal logging on the U.S. wood products that conclude that illegal forest activity represents between 5 percent and 10 percent of global industrial roundwood production. The study suggests that as much as 23 percent to 30 percent of hardwood lumber and plywood traded globally could be of suspicious origin. The study further stated that the availability of significant volumes of illegal wood internationally depresses prices for U.S. wood products by between 2 percent and 4 percent, and may cost legitimate producers as much as \$600 million a year in lost sales. In certain important markets, illegal material significantly affects the ability of U.S. producers to export.

"Therefore, AHEC welcomes the efforts of policy makers in Europe and around the globe to play a leadership role in tackling the international problem of illegal logging," the report stated.

On a separate matter, the membership meeting was provided a report about AHEC commissioning an "Assessment of Lawful Harvesting and Sustainability of U.S. Hardwood Exports" in response to increasing demands in major export markets for independent assurances that U.S. hardwoods derive from legal and sustainable sources. AHEC reported that the study was prepared by independent consultants at Seneca Creek Associates with a team comprised of well-regarded and independent analysts and experts in the field of U.S. forest policy and forest certification.

AHEC is the leading international trade association for the U.S. hardwood industry, representing the committed exporters among U.S. hardwood companies and all the major hardwood product trade associations. From Washington, D.C. and six overseas offices, AHEC conducts a worldwide promotional program with activities in more than 35 countries. AHEC offices in London, Osaka, Hong Kong, Mexico City, Seoul and Shanghai are strategically located near key hardwood markets. AHEC's members and overseas offices service the growing global demand for U.S. hardwood and represent the full range of U.S. hardwood products including: lumber, veneer, plywood, flooring, molding and dimension materials.

AHEC is headquartered in Washington, D.C. Contact information for those offices is 202-463-2774.

FMC-

Continued from page 1

attract overseas purchasers." The tradeshow, held recently at the Shanghai New International Expo Center, is in its 14th year, and has drawn both domestic and international buyers with focus in recent years on increasing international attendance. Its focus is on furniture and the raw materials, components and woodworking machinery used for producing it. Its vendors are those that seek to balance high

quality with affordability. Some brands that regularly attend this show are Homag, SCM, Wemhoener, Freud, Leitz and Leuco. The Taiwan Woodworking Manufacturers Association brings members like Fonjin, Jun, Shiau, Gesong and many others. Within China, Nanxing, Shanghai Yuetong, Qiulin, Sichuan and Qingcheng and many others are regular attendees.

In fact, the show has grown so much in recent years that exhibition space is now at a premium. In 2008, FMC had nearly 20,000 square meters less space than that desired by potential vendors. FMC has worked to accommodate visitors in this crowded environment by beginning to designate special display areas for categories like office furniture, components, and fittings to help visitors better find the vendors most appropriate for their needs. FMC is now the second largest furniture trade show in China, and is held concurrently with the largest such trade show, Furniture China.

To get this status, FMC has been battling with ZOW. ZOW's director, Zhou Wen Long, requested that Wang Ming Liang join his staff. Wang declined, and instead began his own show, FMC. FMC attracted the China National Furniture Association, and secured the Shanghai Pudong Exhibition Center, once the home of ZOW. Instead of engaging in constant competition, ZOW refocused and now is a different kind of show. ZOW looked outside of Shanghai to attract major Asian furniture companies, the Hong Kong Furniture Association, Taiwan Furniture Association,

and the Dongguan Furniture Association.

When their traditional space was no longer available, Zhou moved the show outside of Shanghai and set it up as a permanent exhibition. This move has seemed successful, as almost all of their exhibitors decided to build permanent show rooms at ZOW. While both of these shows attract a mixture of domestic and export markets, FMC and ZOW now present two very valuable and very different opportunities for American hardwood suppliers to explore.

The physical size of the show itself, however, is not a clear representation of an industry in turmoil and a shift in how trade is conducted in this industry. What is evident is the decreasing number of foreign exhibitors, at least from the number of U.S. representation. What used to be a must-exhibit fall show for U.S. suppliers of American hardwoods has been offset by companies' need to budget expenses. In the past, 15 to 20 U.S. hardwood exhibitors were easily noticeable. For the recent FMC, maybe approximately eight were present and even half of those represented by their local representatives.

There were a growing number of Chinese stockists that supplied U.S. hardwoods, a trend also not common in previous shows. For suppliers of American hardwood, the number of exhibitors has decreased. Attributing to the decrease of U.S. presence was the competing ZOW show being held simultaneously that created confusion. As an U.S. exhibitor with limited budgets, to pick and choose between similar shows is a tough task and can easily be passed on for a more concise show focusing on the products. Also, the *Premium*

section, where U.S. hardwood suppliers were exhibiting, forced visitors to not only have to register upon general entry but also to re-register to visit this portion of the show. The consensus was quite common amongst all exhibitors and visitors; it kept more people from visiting the show.

This particular industry in China plays a huge role in the economy of the People's Republic and it's only beneficial to the show organizers that these tradeshow must be functioning properly in order to showcase China's role in this industry. For whatever reasons, politically or economically, the show must have a clearer message in order to attract exhibitors and visitors. However, as China ascends the global economic ladder, it's evident it is building its domestic market, so they may not need to rely as much on foreign investors as China has done in the past.

WHO'S WHO - Dow

Continued from page 2


sawmills and a hardwood dimension facility, which produces laminated panels, squares, moulders blanks and other hardwood parts. The firm specializes in surfacing, ripping to size and other processes.

Yoder Lumber Co. is a member of the National Hardwood Lumber Assoc. (NHLA), Wood Component Manufacturers Assoc. (WCMA), Ohio Forestry Assoc.,

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NEWMAN

HMA PHOTOS - Continued from page 14



Tina Radigan, Abenaki Timber Corp., Kingston, N.H.; Terry Miller, Import/Export Wood Purchasing News, Memphis, Tenn.; and Nikki Beuschel and Lise Lennon, Abenaki Timber Corp.



Terry Miller, Import/Export Wood Purchasing News, Memphis, Tenn.; Bill McCauley, Weyerhaeuser Hardwoods & Industrial Products, Orchard Park, N.Y.; and Paul Dow, Yoder Lumber Co. Inc., Millersburg, Ohio



Joe Montgomery and Jason Twigg, Tuscarora Hardwoods Inc., Ellittsburg, Pa.; Dean Alanko, Allegheny Wood Products Inc., Petersburg, W.Va.; and John Grunwald, Danzer North America, Princeton, W.Va.



William Crowley, Crowley Hardwoods Ltd., Clare, Ireland; John Brown, Pike Lumber Co. Inc., Akron, Ind.; and Larry Evans and Richard Uria, Industrial Timber & Lumber Corp., Beachwood, Ohio

AHEC PHOTOS - Continued from page 1



Aethan Quinn, AHEC, London, England; Orn Gudmundsson Jr., Northland Corp., LaGrange, Ky.; and Tony Orta, Frank Miller Lumber Co. Inc., Union City, Ind.



Nancy Arend, Northwest Hardwoods, Federal Way, Wash.; Jameson French, Northland Forest Products Inc., Kingston, N.H.; and Deb Hawkinson, Hardwood Federation, Washington, D.C.



Stephanie Van-Dystadt, DV Hardwoods Inc., Fassett, Que.; Roberto Torres, AHEC, Mexico City, Mexico; and Larry Mether, Midwest Walnut Co., Council Bluffs, Iowa



Ron Carlsson, USA Woods International, Memphis, Tenn.; Jason Green, Industrial Timber & Lumber Corp., Beachwood, Ohio; Adam Moran, Hermitage Hardwood Lumber Sales Inc., Cookeville, Tenn.; and Joe Pryor, Oaks Unlimited Inc., Waynesville, N.C.



Stan Smith, Midwest Walnut Co., Willow Springs, Mo.; Jeff Irwin, Pike Lumber Co. Inc., Akron, Ind.; Tsuji Takahiro, AHEC, Osaka, Japan; and John Brown, Pike Lumber Co. Inc.



Scott England, Gilco Lumber Inc., South Charleston, W.Va.; Peter King, Cersosimo Lumber Co., Export Division, Brattleboro, Vt.; and Luis Zertuche, AHEC, Mexico City, Mexico



Clifford Nelson, The Jacobs Team, Hamburg, N.Y.; Nancy Arend, Northwest Hardwoods, Federal Way, Wash.; Jack Shannon III, J.T. Shannon Lumber Co. Inc., Memphis, Tenn.; and Mark Bennett, Brennenman Lumber Co., Mount Vernon, Ohio



Steven Sievers, CK International LLC, Durham, N.C.; Dave Hunter, Gutches Lumber Co. Inc., Cortland, N.Y.; Tim Webber, CK International LLC; and Doug Hunter, Gutches Lumber Co. Inc.



Chris Kilbarda, Seaboard International Forest Products LLC, Nashua, N.H.; Brin Langmuir and Karl Seger, Falcon Lumber Ltd., Toronto, Ont.; and Lawson Maury, Hermitage Hardwood Lumber Sales Inc., Cookeville, Tenn.



Pat Altham, AHC Export Group, Huntersville, N.C.; Joyce Miller, Foresbec USA, New Albany, Ind.; and Richard Conti, Matson Lumber Co., Brookville, Pa.



Bucky Pescaglia, Missouri-Pacific Lumber Co., Fayette, Mo.; Gil Thurm, Hardwood Manufacturers Association, Pittsburgh, Pa.; and Terry Miller, Import/Export Wood Purchasing News, Memphis, Tenn.



Nathan Tellis and Rob Sohi, McKenzie Sawmill Ltd., Surrey, B.C.; Jim Rodway, Patrick Lumber Co., Portland, Ore.; and Robb Hansen, Ranj Saran and Peter Giroday, McKenzie Sawmill Ltd.

GLOBAL BUYERS PHOTOS – Continued from page 11



Ron and Chris Eldridge, Lumbermens Building Centers/Pro-Build, Arlington, Wash.; Brian Kapuscinski, KMP Architecture Inc., Victoria, B.C.; and William Hofius, Leaders Pact Consulting, Marietta, Ga.



Jason Jacobson and Scott Bowen, Coldwater Timber Products, St. Anthony, Idaho; and Ranj Saran and Peter Giroday, McKenzie Sawmill Ltd., Surrey, B.C



David Knott, The Clarke Group, Mission, B.C.; Mark Rutledge, Green River, Mission, B.C.; Don Slack, Fraserview Cedar Products Ltd., Surrey, B.C.; Dennis Mawhinney, BC Wood Specialties Group, Langley, B.C.; and Bryan Lundstrom, Fraserview Cedar Products Ltd.



Miho Ohashi, BC Wood Specialties Group, Toyko, Japan; Masayuki Yonezawa, Yonezawa Sawmill Co. Ltd., Shimonikawagun, Japan; Aaron Moore, B.C. Log & Timber Building Industry Assoc., Victoria, B.C.; and Hiromi Abe, interpreter, Vancouver, B.C.



Bryan Lundstrom, Fraserview Cedar Products Ltd., Surrey, B.C.; Jorg Bolz, Bolz Hobelwerk, Vorstetten, Germany; Don Slack, Fraserview Cedar Products Ltd.; and Christopher Roberts, First Base Services Ltd., Abbotsford, B.C.



Alan Messett, Bridgeport Forest Products Inc., Cambridge, U.K.; Vicki Onuliak, Bridgeport Forest Products Inc., Portland, Ore.; and Shane Carphin, Cowichan Lumber Ltd., North Vancouver, B.C.



Charlene Ellickson, John Kuch and Debra Kruks, Crawford Creek Lumber Co. Ltd., Surrey, B.C.; (standing) and Bill Paton, Westshore Specialties Ltd., Delta, B.C.



Kasper Kopp, John Kuch and Charlene Ellickson, Crawford Creek Lumber Co. Ltd., Surrey, B.C.; and Delin Jiang, Shanghai Zhong Ji Import and Export Co., Inc., Shanghai, China

MCLENDON -
Continued from page 17

wood and wood products should be counted. IWPA welcomes the transparency that Lacey will give to imported wood products and embrace the legal assurances that Lacey provides architects, designers, users and distributors of imported products. We think other sectors should do so as well.

Brent McClendon is Executive Vice President of the International Wood Products Association (www.IWPAwood.org)

FORECAST - Beard
Continued from page 4

will be better than 2008. During this crisis we have all had to make very difficult decisions and sacrifices. Because of this we have become better and more efficient operators. While many of us are in the "controlling the bleeding mode," 2009 we'll see the "bleeding stop" and we'll see a return to profitability.

I am starting to see some of our customers feeling better about business. It's the first time in many years that some of my domestic furniture and molding manufacturers are increasing production. The huge freight increases in 2008 are now driving some furniture production back to the United States which is very encouraging. It's obvious that we're starting to realize that our society needs to create value and manufacture something here. With energy costing more, almost daily, "Outsourcing" is a word that is rarely mentioned anymore.

The majority of problems that we will face in 2009 will stem from the economic crisis that we've faced for the past year. With our close ties to the housing industry and tougher bank regulations, banks are increasingly getting more difficult to work with. Lack of available credit will have a big impact on how lumber companies are able to conduct business. This coincides with production issues that we are experiencing in this area this fall. Many mills are unable to finance log and timber purchases, thus creating some major supply concerns in a specie that we're not used to having supply problems in: Poplar! Will demand finally outpace supply and create some opportunity...I think, hope, so...?

I can honestly say that I've never been bored in this business! If you like to be challenged this is a great business to get into. We are looking forward to the challenges that we face in 2009. Merry Christmas and a Happy and Prosperous New Year!

FORECAST - Redmond
Continued from page 4

Sawmills are closing, many are running reduced hours, log inventories are extremely low. The domestic consumers of our hardwood lumber are concerned about supply issues, however are unwilling or unable to do anything about it. Uncertainty and concern rule. We are an industry trying to "tread water" not quite sure where we'll end up when we reach land. These are indeed dark days for us all.

However, these old sayings; "it's always darkest before the dawn"; and "the true temper of a man (or industry) is determined by the heat of the fire"; are applicable. Every day owners and managers of companies are asking the questions over and over again: Am I overlooking something, how can we further cut cost, what can our marketing department do to increase sales (and hopefully generate a profit)? We have been, and continue to face challenges our fathers and grandfathers would never have dreamed of. The market dynamics are ever changing, prompting the question, "where do we go next?"

The hardwood industry is primarily comprised of family-owned businesses. They work hard and are individually tempered, resourceful, resilient, innovative and stubborn. The long-term supply (or sawmill) side, in my opinion is weakened but not defeated. When demand is strong enough, and prices are improving, we can expect supply to react positively. The North

American temperate hardwood resource is sought after, even coveted by much of the world. Our resource sustainability and transportation infrastructure enable us to react positively and rapidly. We are dependable suppliers to the world. Our industry associations are continually striving to efficiently deal with promotion, government regulations, certification, education, order and structure. There is indeed strength in numbers with a unified voice.

I am firmly convinced, there will be a market for our product, both at home and abroad. Energy costs may eventually impact where consumer products are manufactured, not just the cheap cost of labor and lack of governmental and environmental regulations. We didn't get to this point overnight, and we will not see our way out overnight. I feel our country is many months away from a significant economic recovery. (Doesn't there seem to be more houses on the market every day?) There is no need to even discuss the stock market, we are all acutely aware of the situation.

Let each of us keep our focus sharp and determination to succeed strong!

Each of us at Highland Hardwood Sales, Inc. wish everyone a Merry Christmas and Happy New Year. We do have much to be thankful for!

FORECAST - Newman
Continued from page 4

dential election. A big factor in the economic turnaround will be who takes control of the White House in January 2009. In a presidential year, economic recessions are highly unlikely with each party doing what is necessary to improve the economic climate. If the housing market problems begin to spill over into the rest of the economy, we could face a challenging market for all of 2009.

ber exports. Meanwhile, countries with hugely expanding manufacturing have been experiencing the problems that come with rapid growth.

The hardwood lumber market in 2009 seems to be very uncertain right now, but we feel that there will continue to be opportunities for U.S. hardwood lumber producers as overseas manufacturers shift to the newly emerging middle classes of the developing countries.

It could be that moving from the world's best customer back to the world's best supplier will help us all in the long run.

FORECAST - Webb
Continued from page 4

only focusing on the cheapest of product #1&2 Common Poplar or substitute products besides NA hardwoods. This will continue to put additional pressure on mills and kiln operations as we cannot run profitably or efficiently if our only option is Poplar. We will continue to try and reach secondary markets that understand the value of North American hardwoods and manage our operations as efficiently and cost effective as possible, but without U.S. economic improvement these cuts will not keep mills running in North America.

Our customers forecasts are much the same and the reason we have been forced to make drastic and disappointing cuts. Most all domestic manufacturers have cut purchasing or production by more than 30% and in most cases more than 50% or shut down all together. They do not see 2009 picking back up at the same pace it slowed down. Now we are seeing the manufacturers in China, Vietnam and other markets hit the same wall.

The major problem for all of us be it a sawmill, domestic manufacturer or foreign manufacturer is over the past 10 years we have watched our customer base shift from North Carolina to Southern China to Vietnam and beyond, the very same furniture has only been shoved back on the

U.S. consumer. At no time was our rough lumber used in any meaningful volumes to make product that was used in these very same countries domestic markets. At the same time all other woods from any country willing to accept a price was being made into product and shipped into our market. Now as we reach 2009 and middle class America has exhausted our equity, credit cards and patience it will take joint efforts by the furniture makers of the world to again invest in all species, quality hardwoods and marketing, not shop their design out to the cheapest bidder in China who will then source whatever product can come close to looking like Cherry or Oak, at the cheapest price.

We will continue to market the truth about our product and trust as the American people and many other countries around the world begin to dig out from this mess hardwoods will once again find stability and profit.

No plans to expand, just keep what we have. Demand will return and our plans are to be healthy enough when it does return to meet our customers needs. My best guess is we need to get into the next decade before any talks of expansion are made.

Our forecast for 2009 is that business will continue to be a struggle, but there will be business for those that are willing to work for it. We also feel that there will be new opportunities for companies to recapture business that had once been sent overseas. We are hearing from more and more companies that are currently having products manufactured in Asia, but are now seeking to have them made in North America. The reason for this change can be attributed to three specific factors; the first being the drop in the dollar, the second being increased ocean freight rates and the constant re-scheduling of containers, and the third and most important factor is the severe drop in quality of imported products.

This is a perfect opportunity for manufacturers to focus on the things they can control, quality and prompt deliveries. There will always be people interested in offering an extremely low price, but successful businesses are starting to realize that they must become integral partners with their suppliers if they are going to survive and prosper. The companies that are able to say "yes, we can do that" and then find a way to do it, on time and as promised, will see their business expand in 2009.

Our members are forecasting a year that shows between 2-6 percent growth. The majority of this will be derived from providing new or additional product to existing customers, with a small percentage attributed to new business. The majority of the new business will come from providing products or services to companies that have had their current suppliers change focus or exit the industry. The balance of the new growth will come from manufacturers that have thought "out of the box" and created new value-added items. All members have stated emphatically that they have increased their sales and marketing efforts and are working harder than ever for the orders they are able to write.

As an association, the biggest challenge we face in 2009 is getting members to take advantage of all the programs and services made available to them. With business being as challenging as it is, companies are often so busy juggling multiple tasks that they forget to reach out and utilize the benefits that are available to them. To address this need, the WPMA will continue to strengthen our "member reach" program to constantly focus on the needs of our members. The feedback from the "member reach" program was instrumental in the association offering a discounted accounts receivable insurance program through our partnership with Euler Hermes. It also led to the expansion of our cash back business insurance safety group program with our partner Indiana Lumbermens Mutual Insurance (ILM). Participants in the program will be able to receive up to 10 percent of their annual premiums if the safety

group has a good year. Being a member driven association, we are constantly looking for ways to reinvent ourselves to be able to offer programs and services that help solve member problems and improve the bottom line.

In 2009 the wood industry will continue to see change and evolution. Companies that are producing products for the consumer market will continue to see fewer dollars available for discretionary income. Those that do have funds to spend will be looking for the best value for their dollar and an item that will possibly serve more than one function. The upcoming year will be one in which successful businesses take a long hard look at what they produce and who they sell to. Companies that have been producing commodity type items will see business much harder to come by. It has been said over and over that people should focus on producing niche products that might not be available in large quantities, but repeat often. In order to do this, companies must continue to focus on lean manufacturing and extremely fast turnaround times. They must take the "yes we can attitude." Those that do, will be around in 2010, those that do not will be featured in an auction flyer.

Bud Griffith
Griffith Lumber
Co. Inc.
Woolwine, Va.



We are all cautiously optimistic here at Griffith Lumber. Timber availability is difficult along with fuel costs. Lumber prices are too low while timber and manufacturing prices are too high. One positive aspect is that we are starting to see Poplar lumber prices come up a little.

On the timber side of business a lot of loggers are retiring and younger men aren't coming into the business fast enough to replace those we are retiring. You see a lot of younger guys pursuing other careers rather than harvesting timber. Equipment and insurance are expensive and it's hard to buy timber.

We hope for an uptick in business around the spring of 2009. Of course, a big factor in whether the lumber business gets better has to do with the housing market getting stronger. From the people I've talked to, we are hoping the economy begins to turn around for the better in the spring. We are afraid it will not improve until 2010. Many of us in the lumber business have gone through a tough year and we'll probably have to go through one more.

The stacking stick business has been slow. The closing of so many furniture manufacturing companies has adversely affected stick sales. The housing industry affects the Southern Yellow Pine mills and those folks make up about 60 percent of our stick sales. Lumber inventories are low all across the United States and when that occurs, Southern Yellow Pine sawmillers don't need a lot of sticks. If we could keep supply and demand in the lumber industry in balance and people don't over produce again, things will balance out and prices of lumber and sticks will stay at a level where everyone can make a profit. Our business will pick up when housing and the grade lumber market picks up. We are patiently waiting for that to happen.

In the meantime, here at Griffith Lumber Co., we are keeping overtime down and we're making management decisions to help keep our company healthy even in this slow economy. We are in the process of installing a moulder at our stick plant to make an improved profile stacking stick and for other value-added lumber products. Also we are installing two dry kilns with a combined capacity of 140,000 board foot per charge that will be furnished steam by a woodfired boiler. The kilns and boiler should be operating in early 2009.

I want to take this opportunity to wish everyone in the lumber industry a Merry Christmas and a Happy New Year.

Tom Inman
Appalachian Hardwood
Manufacturers Inc.
High Point, N.C.

The most reliable way to forecast the future is to try to understand the present. An attempt to heed John Naisbitt's advice

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FORECAST - Inman

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energy costs and declining markets. American hardwood lumber production dropped substantially in 2008 and the second half of the year found most sawmills at below normal levels for logs, higher inventories of grade hardwood lumber and order files with few orders.

With that understanding, 2009 will be off to a slow start. Many economists are predicting that it will be the third quarter before any noticeable uptick in business.

That's a safe bet. It will take months for the credit markets to settle and probably the remainder of 2009 for homebuyers to make a dent in the backlog of available housing.

Residential housing has become a major customer for American hardwoods. Flooring, cabinet, millwork and furniture production all track with housing and most have plenty of inventory to move first.

Many lumber producers in the Appalachian region are dealing with fewer loggers, finding less timber for sale at a reasonable price and rising costs to manufacture products. Those conditions will continue through 2009 along with a tight credit market. Cash will be king as financing choices disappear.

On the positive side, Appalachian producers and distributors will find new customers for Appalachian Hardwood Verified Sustainable lumber. A slight increase in demand for certified wood will continue in 2009 and be met with little supply. These customers have found AHVS a reasonable alternative to certified hardwood and placed orders.

I believe that will continue as secondary manufacturers learn of the resource available in the 12 states of the Appalachian region and the sustainable growth to removal ratio. AHMI will educate and promote this to consumers and reach out to other hardwood producers and distributors in and around the Appalachian region.

Jim Skiver
Liberty Lumber
Company
Liberty, N.C.



We look forward to continue servicing our customer base as the lumber industry gets harder to understand. With supply lines slow and the order file thin, it presents daily challenges to understand how to move product. Thanks to a healthy export market, we have been able to keep moving product with some certainty for tomorrow and the month ahead, and that is about as far ahead as you can look. Hopefully as the markets get feet again after the election, our markets will liven as well.

Our customers are also trying to work through these times of uncertainty. Each one has a different story of how this order dried up or got smaller. Our job is to try and help tie good producers together with users that we hear about in our daily conversations about "I can't get moulding, flooring, frames", and the like. Most think it will be a long time before we see business back to some kind of normalcy!

This year has definitely been difficult in the hardwood industry. We have endured increases in all facets of manufacturing costs, as our product price has searched the abyss for the bottom. I think we are in for more of the same with lean manufacturing being the only tool of survival. Our government has done everything possible to make sure businesses in this country have no chance. We are the most regulated, taxed, permitted, scrutinized producers in the world. Certification schemes abound and we will have to look to this as a tool to help us function in this Green society. Fuel is such a large part of our individual operations from the loggers in the woods to the sawmill and dry kiln and truckers and

steamship lines that carry the containers, it will be a long time before we learn to operate with this variable.

We look forward to the challenges coming with the idea that as it gets harder, coalitions with other producers that understand lean manufacturing and doing the job right the first time will make our products desirable worldwide. New emerging markets are going to present themselves, with the certified forest products we have to offer, things should improve as long as we can source lumber, saying that, the production shortages should work towards the demand sometime in early 2009.

We have built more storage buildings this year to improve our reaction time to "just-in-time" shipments as well as handle more species. This has been a great help to our sales force and our customer base. With the changing market conditions, we are the warehouse to most of our customers. As time goes by I think we will see more of our friends and competitors decide to close doors that have been open for decades and more. This natural attrition has to take place so our industry can find the bottom and work our way back up.

Our hopes for the coming year are to continue to strengthen our relationships and have the products that are needed to help them profit in their organizations. We should be "Certified" late this year, both FSC and SFI. I hope this is a direction that will pay off in the building industry as the market comes back!

Thanks to all who work with us in these trying markets as we all look forward to better times!

Marijo Wood
Neff Lumber Mills
Broadway, Va.



We think business conditions will get better in 2010, however the reality is nobody really knows when the economy will get better. We are hoping for a turnaround the middle of 2009. Currently in the Appalachian region there is a shortage of Poplar lumber, so prices of this species of lumber have risen, and that's good for our overall business.

At Neff, we have our own sawmill that cuts mostly grade lumber but we also manufacture pallets and survey stakes. We have plenty of logs and our Red Oak and White Oak strips are selling well. There has been a slowdown in the lumber industry in the U.S. for the last two to three years but we've increased our lumber exports, so today it's about 75 percent of our business, with the other 25 percent of our sales being in the domestic market. Container shipping is relatively adequate depending on the country a company wants to ship to. For example, if we're shipping lumber to Malaysia, it might be three or four weeks before we can get a container, and if we're shipping to Italy it may only be a week or two.

As for certification, presently, we're not really affected. People abroad know that

our lumber is manufactured from logs that come from forest lands that are sustainable. Our agent in Denmark, for example, said that he knows that lumber exported from the United States comes from sawmillers, or other export lumber suppliers, who, "down the line" are using good forestry practices.

When we saw a downward trend in the economy occurring in 2005, we added a dry kiln specifically for heat-treating our pallets. That has helped us expand our markets for our pallets both internationally and domestically.

We'd like to take this opportunity to wish everyone in the hardwood industry a Merry Christmas and Happy New Year.

Jim Tanner
Tanner Lumber Co.
Elkins, W.Va.

With so much of our business being related to the housing industry, I do not believe we will see a major upswing in the hardwood lumber business until new housing starts begin to rebound. The real issue, in my opinion, is can an optimistic lumber supplier survive until this happens.

In these economic conditions, sawmillers are trying to decide whether to continue operations during these times of a down market, or whether to shut down operations and wait it out. Most of our sawmill

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FORECAST - Tanner
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suppliers are people who have been in business for a long time, and have the financial reserves to stop producing lumber if they so choose. They are not talking about selling their mills, but are considering taking a stop, wait and see position. If things do not improve within a reasonable amount of time, they will then decide if they want to liquidate their operations.



One of my biggest concerns is that I do not believe anybody in the lumber business is making a profit and no one is excited about hanging on for a year or two until the business becomes profitable again. If too many samills disappear from the supply stream, it will become difficult to meet today's demands not to mention the demand when the housing market does rebound.

Additionally, the cost of timber has not dropped in price in relation to lumber, which is adding to the squeeze. We are located in the midst of the world's best timber supply and I see the pressure the mills are experiencing. We must see a rebound in lumber prices before the yards and mills will be able to get back to where they can survive.

Fuel costs are affecting everything we do in the lumberyard business.

Every raw material we use, other than lumber, has increased in price, which is making it difficult for us. Everyone is experiencing the same problems: increased costs, lower gross profit margins. For example, the price of steel has risen considerably causing an increase in the cost of everything we have to purchase for the continuation of our operations while the profit margin on everything we sell is dropping.

I hope we will see some improvement in the 1st quarter of 2009. I do not, however, think we will see much, if any, improvement for another six to nine months. We will

have to wait and see what effects the government bail out programs will have had on the economy and Wall Street. We are in uncharted waters as far as the Federal Reserve loaning huge amounts of money to banks and Wall Street firms – the outcome uncertain at best. Until the problems with Freddie Mac and Fannie Mae are resolved, we are not going to see housing starts improve much. Nor do I foresee a major recovery until the surplus of foreclosed houses are out of the marketplace. I am starting to see some evidence of that happening now but how long and how fast it takes is anybody's guess. I hope that it will take no more than a year for the market to move the foreclosure houses and new home starts will come back at a reasonable pace.

I want to take this opportunity to wish everyone in the lumber industry a Merry Christmas and a Happy New Year, especially our friends, customers and suppliers here at Tanner Lumber Company.

Robert (Butch) Bernhardt Jr.
Director,
Information
Services
Western Wood
Products Assoc.
Portland, Ore.



The historic downturn in lumber demand will likely extend another year until the American financial system and housing market can be repaired, according to a new lumber supply and demand forecast from Western Wood Products Association

According to the lumber trade association, lumber demand is expected to drop 15 percent to 44.3 billion board feet this year, then fall another 3 percent to 43 billion board feet in 2009. In just three years, demand for lumber has plummeted by some 20 billion board feet – more than what Western mills produced in all of 2005.

Housing starts are forecast to reach just 993,000 in 2008 and decline again to 933,000 next year. Since new housing typically accounts for more than 40 percent of

annual lumber demand, the more than 50 percent decline in starts from 2005 has been a body blow to lumber mills.

The volume of lumber used in new home construction is expected to total 11.8 billion board feet in 2008 – less than half of the 23.3 billion board feet used just two years earlier.

Production in the West should total almost 14 billion board feet this year, slipping to 13.6 billion board feet in 2009. That would be the lowest annual volume since 1982. Since 2005, output at Western mills has declined some 28 percent, or more than 5 billion board feet.

Lumber production in the U.S. South is forecast to decline 9 percent to 15.2 billion board feet this year, then fall 2 percent next year.

The demand decline, coupled with unfriendly currency exchange rates and higher transportation costs, is taking its toll on lumber import volumes. Following a 19 percent decline in 2007, total imports this year are forecast to decrease 21 percent to 14.5 billion board feet. A 3.6 percent drop is predicted for 2009.

Canadian imports, which represent more than 90 percent of the volume of imported lumber, are expected to lose marketshare. Imports from north of the border should total 13.1 billion board feet this year, then fall 3 percent in 2009.

Non-Canadian lumber imports, mostly from Europe and Latin America, have also plummeted. Just 1.4 billion board feet is forecast to be imported from non-Canadian destinations in 2008, compared to 3.2 billion board feet shipped to the U.S. in 2005.

The WWPA forecast calls for housing markets and lumber demand to grow in 2010, but cautions that any recovery will be slow

Western Wood Products Association represents lumber manufacturers in the 12 Western states. Based in Portland, WWPA compiles lumber industry statistics and provides business information services to mills. The Association also delivers quality standards, technical and product support services to the industry.

Chuck Dean
President
Dean Hardwoods Inc.
Wilmington, North Carolina

"The sky is not falling. The sun will rise tomorrow, and those of us who get up early enough, and dig hard enough for it, will get that elusive order.

My opinion is that business has been hammered down to such an extent, there is a pent up demand just waiting for a source of money to begin again whatever it was they were doing before the financial squeeze.

I believe the Federal Reserve will soon



Chuck (Seated) and Matthew Dean

demand a loosening of credit to small businesses by the banks to whom the government has invested billions to shore them up and restart the economy.





Once that happens, I believe we will see the trickle down effect begin to the people in small businesses who need the money to restart their particular part of the building machine - earlier in 2009 than so many gloom and doomers forecast."

JB WOODCRAFT -

Continued from page 5

tables and beds while veneer sheets are used for tabletops. Like most manufacturers who export to the U.S., the decision to use American wood was customer dictated.

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