

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

February/March 2009

2009 International Builders Show® Explores Economics, Green Building

Las Vegas, Nev.—Approximately 60,000 housing industry professionals recently attended the 2009 International Builders Show (IBS), held here at the Las Vegas Convention Center. While the housing industry overall is at one of its lowest points historically, the outlook of those in attendance and exhibiting were hopeful regarding opportunities in the future.

Regarded as the premier light construction show by industry insiders, the 4-day event blends hands-on demonstration with straightforward advice from housing experts. The builder's annual home show was hard to miss at IBS. The 2,426-

square-foot two-story modular home was shipped to the convention center days before the show opened. The contemporary home, designed by Kieran Timberlake Associates of Philadelphia reportedly satisfies several housing goals, including a financially affordable, green-built, well-designed house. It features stacked, 500-square-foot modules that create the home's main living areas, panelized walls, floor and roof system demonstrate the flexibility of the factory-built concept as the framework for an upstairs third bedroom that is supported by a carport below. Designers of the home stated that this "hybrid

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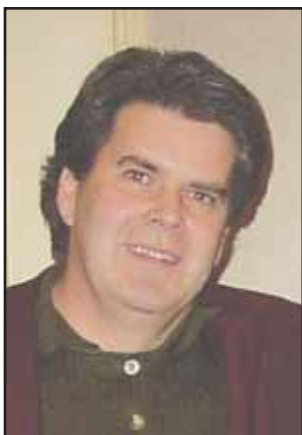
Larry Mether, Midwest Walnut Co., Council Bluffs, Iowa; Stan Smith, Midwest Walnut Co., Willow Springs, Mo.; Gary Keller, Midwest Walnut Co., Council Bluffs, Iowa; and Johnny White, Midwest Walnut Co., Willow Springs, Mo.



Rick McKinney, East Teak Fine Hardwoods Inc., Sultan, Wash.; Wayne Rogers, East Teak Fine Hardwoods Inc., Donalds, S.C.; Ruth Castillo, Titan Wood Ltd., Dallas, Texas; Matt Mladenka, East Teak Fine Hardwoods Inc., Dallas, Texas; and Bob Romweber, East Teak Fine Hardwoods Inc., Jackson Hole, Wyo.

Freight Companies Struggle To Overcome Dramatic Decrease In Business

(Editor's Note: Last year at this time, Curtis Struyk of TMX Shipping Co. Inc., Morehead City, N.C., and Lloyd Lovett, Transit King City/Northway Forwarding Ltd., Montreal, Que., were asked by The Import/Export Wood Purchasing News to discuss how higher freight costs are impacting the wood products industry. To follow, the two shipping and freight-forwarding experts with 60-years combined experience offer their insight into current container, rail and ocean freight trends.)



Lloyd Lovett

Lloyd Lovett is president of Transit King City/Northway Forwarding Ltd., a domestic and international freight forwarding company that has been in business for over 30 years. The firm evolved from a local Montreal stuffing terminal, C.M. Containers Ltd., which was founded by Marc Berard in 1972. As the company grew, Northway Forwarding and King City Containers Ltd. were added to serve customers throughout Canada and the northeastern U.S. Clients ship all over the world including North, Central and South America; the Caribbean; Continental Europe; the Middle East; the South Pacific and East, West and South Africa.

In a recent interview, he compared the current economic situation to the economic conditions of the 1980s. "This recession is a global recession as opposed to previous recessions," stated Lovett.

Lovett feels that in the early 80's the recession did not affect the international overseas markets like it affected the North American markets and so exports at

Continued on page 12

Curtis Struyk is vice president of TMX Shipping Co. Inc. The company has offices in Morehead City, N.C., and Virginia Beach, Va., as well as partnerships around the world. Since 1985, TMX Shipping has worked to provide customized service, understanding protocol and tending to the minutest details. TMX Shipping is founded on strong customer service, called Customized TMX, with every customer having just one account manager who oversees every phase of that customer's cargo shipments.

Struyk commented that business was slow and that he anticipates it to get slower in the first half of 2009. He said that rates have decreased by 40 percent in comparison to last year. "There's not enough freight going out, not just in the lumber industry either. So rates are being cut in an effort to get marketshare."

Struyk said that business for TMX Shipping is currently down 30 percent, but not for 2008 as a whole. "We started off real strong and then in October the bot-



Curtis Struyk

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Who's Who in Import/Exports



GEORGE V. GUY

George V. Guy is vice president of sales and operations for **East Teak Fine Hardwoods Inc.** in Donalds, S.C. East Teak Fine Hardwoods specializes in Teak (Genuine FEQ, Burmese, FSC and Reclaimed) mouldings, millwork, flooring and lumber as well as other exotic and domestic species

Continued on page 8



MARKUS HAWKINSON

Markus Hawkinson is a sales representative for **Hawkeye Forest Products** in Boise, Idaho. Hawkeye Forest Products manufactures FAS lumber in such species as Black Walnut (4/4 through 10/4), Cherry (4/4 through 8/4), White Oak (4/4 and 5/4),

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ROB KUKOWSKI

Rob Kukowski is the export sales manager for **Devereaux Sawmill Inc.** in Pewamo, Mich. Devereaux Sawmill produces nearly 20 million board feet per year of quality Michigan hardwoods including Soft and White Hard Maple, Red and White Oak, Cherry, Hickory, Walnut and Ash. The company

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BARRY YUHAS

Barry Yuhas is the vice president of sales for **Salamanca Lumber Co. Inc.** in Salamanca, N.Y. Salamanca Lumber Co. Inc. manufactures such Appalachian and Northern Hardwood species as Red and White Oak, Ash, Cherry, Hard Maple and Walnut (4/4 through 16/4, upper grades

Continued on page 13

AHEC Holds Seminars In Indonesia's Growing Market

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.



Hardwood lumber exports to Southeast Asia fell slightly over 10 percent for the first 10 months of 2008. However, Indonesia is the one market in this region that has seen its hardwood lumber imports increase over 10 percent. White Oak lumber has seen the largest increase at 40 percent nearly 10 million, followed by Ash and Red Oak. Maple, Walnut and Tulipwood have had slight decreases. Sawn timber has become increasingly more important in Indonesia with log imports falling nearly 30 percent, while the rest of SE Asia has imported nearly 15 percent more. Since 2004, Indonesia has more than tripled its imports of hardwood lumber to 60 million. The United States owns nearly 28 percent of the marketshare, twice the amount of its closest competitor, Malaysia, a surprising feat in itself as Malaysia borders Indonesia and has actually exported more hardwood lumber than the United States in the first six months of 2008. With its proximity to the Middle East, Indonesia has also increased its exports of wood furniture in the region such as the UAE, a country where legal and sustainable woods are as equally important as the United States and Europe, illustrating the ripple effects of the growing "green procurement" movement beyond the borders of the main European implementing countries. Indonesia is now the ninth largest exporter of wood furniture with annual exports valuing nearly \$1.2 billion,

close to one-third of China's exports, the largest exporter of wood furniture. Furthermore, local manufacturers have also expressed concern over its domestic raw materials, primarily tropical hardwoods. In addition to the aforementioned and the potential for more growth due to inflation and increasing costs of labor in China and Vietnam, AHEC recently held a series of seminars in the manufacturing sectors outside its capitol, Jakarta.

Over 60 delegates attended the half-day seminar in Surabaya, east of Java and over 90 delegates attended the seminar in Semarang, also east of Java. The seminar was supported by *WoodMag*, a local wood industry trade journal, and covered by other various regional trade magazines. Species diversification, tropical hardwood lumber substitutes, basic grading rules and lower grade potential defects were the main topics of the seminars. Hands-on learning was applied with the assistance of APP Timber, who donated a bundle of wood for the programs.

To support this market, AHEC does not only provide promotional or technical seminars in Indonesia. The strategy is to reach the designers, traders and manufacturers. In this specific region, the target audiences range from Dubai to the owners of the man-

Continued on page 32

Editor's Note: Please see export information chart on page 21

Deforestation Key Topic At U.N. Climate Change Conference

Poznan, Poland—The United Nations Climate Change Conference, held here, ended recently with a clear commitment from governments to shift into full negotiating mode in 2009 in order to shape an international response to climate change, to be agreed at another meeting in Copenhagen at the end of this year. During this conference, negotiators broke an impasse on including forest conservation in a new climate change agreement, providing a voice for native people who live in forests and granting rewards to China and India for replanting depleted lands.

Environmental sources said the compromise text was a critical step that opened up a way to discuss politically sensitive issues about compensation for countries that protect their woodlands.

The text did not mention biodiversity, which could allow countries to uproot

forests in order to plant palm oil or fruit plantations.

The U.N. Climate Change secretariat explained that a separate committee reached agreement on a plan for 2009 calling for a negotiating text to be placed on the table this June.

U.N. delegates agreed three years ago to discuss forest conservation as a means to fight climate change and to stop the clearing or burning of 32 million acres (or 13 million hectares) of forests annually.

The theory is to make it more financially worthwhile to preserve forests than to destroy them for timber or agricultural land. Countries like China and India, which are void of massive deforestation issues and strive to regenerate land that was stripped years ago, take the position that they deserve to benefit from a forestry agreement.

Also, at the conference in Poznan,

Continued on page 13



Obama Expected To Focus On Affordable Housing

Industry analysts expect President-elect Barack Obama to focus on affordable housing issues once in office. While he has been relatively quiet on multifamily housing issues, Obama does support a handful of affordable housing initiatives including the Affordable Housing Trust Fund, which President Bush enacted last year to help provide housing to extremely low-income households.

Obama plans to establish an office of metropolitan and urban policy, which will likely lead to the development of affordable housing, transit-oriented neighborhoods, and greener communities.

"The expansion and implementation of the new national housing trust fund should be the No. 1 priority for the new administration," said Linda Couch, deputy director of the Washington, D.C.-based National Low-Income Housing Coalition. "The resources serve the lowest income households and those are the households most in need of affordable housing."

Continued on page 32

THE WASHINGTON SCENE

Farm Bill Boasts Opportunities For Forest Landowners

The Food, Conservation and Energy Act of 2008, also known as the Farm Bill, includes a number of new programs promoting woody biomass use as well as some that expand forestland eligibility.

A new program, the Community Wood Energy Program, authorizes \$5 million a year in appropriated funds to encourage the use of woody biomass as the primary fuel for heat or energy at publicly owned or operated facilities. The Biomass Crop Assistance Program was also added to encourage the establishment and production of new crops, including woody biomass, for conversion to bioenergy, and to assist with the collection, harvest, storage and transportation of these crops.

The bill includes an additional \$4 billion in funding for the Conservation Title, as well as an expanded purpose for the Environmental Quality Incentives Program (EQIP) to include forest management. The Conservation Stewardship Program has also been overhauled to be more user-friendly and offer new conserva-

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Report From Malaysia And Indonesia

Holiday decorations went up early at the McClendon house this season because of an invitation to speak in Kuala Lumpur at Malaysia Forestry Dialogue recently. My presentation focused on U.S. market conditions and new state and federal regulations. My goal was to not sound too grinch-like while describing the wreckage caused by the housing collapse. After my presentation, I took the "show on the road" and spent the next two weeks briefing forest products groups and companies throughout Malaysia and Indonesia.

The trip was educational on two levels: First, it gave me an opportunity to brief suppliers on the Lacey Act amendments and the California Air Resources Board (CARB) formaldehyde regulation. Second, it afforded me an occasion to tour mills and view the great progress made by these two countries in forest governance and technology.

The good news for you is that supply partners in both countries are confident they can meet the new legal and regulatory requirements of the U.S. market. I agree. In many cases, the



log tracking technology and infrastructure is actually far superior to what we employ in the U.S. During the mill tours, I found technological and environmental best

practices to be the norm, rather than the exception. Companies have made significant capital investments to boost productivity, improve quality and extend the use of the resource. Any investment in these difficult times shows the commitment these companies have to doing it right and remaining a reliable long-term partner for U.S. companies.

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



The resulting product lines are "green" in every sense of the word. These eco-bargains provide consumers with legal, sustainable and

Continued on page 14

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White Oak, Hickory Contribute To DEESAWAT'S Success

By Lucas Ngu



Jirachai Tangkungamwong, marketing manager, of Bangkok's Deesawat Industries Co. Ltd., which manufactures furniture using such species as U.S. White Oak and Hickory.

Bangkok, Thailand—From its humble beginning as a sawmill, Deesawat Industries Co. Ltd. is another dynamic Thai business entity that has evolved to become a big player in the world of wood.

Employing 400 workers, the family

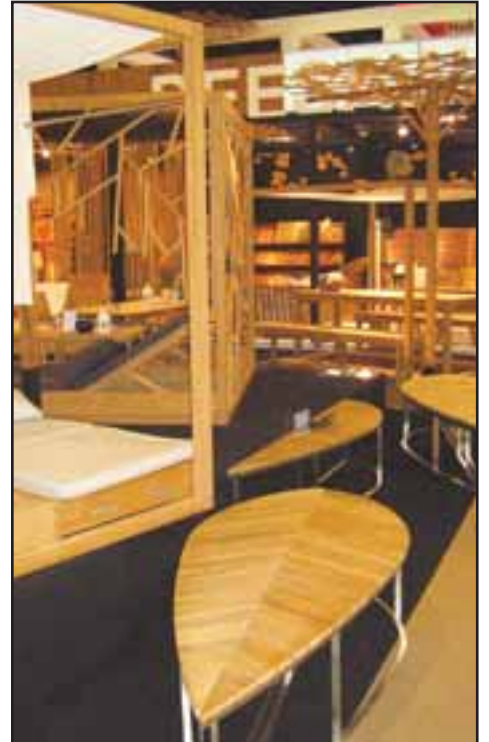


These are samples of doors by Deewasat Industries.

business has ventured aggressively downstream over the years to embark on the production of flooring material, furniture and building materials. Besides, the company also offers services in interior design.

Today, both indoor and outdoor furni-

ture items comprise 70 percent of the items that roll off the production line at Deesawat Industries. From its early association with Teak, the factory has also diversified into the use of other materials like aluminium, stainless steel, and synthetic rattan for the manufacture of a wide range of prod-



These are samples of unique designs of garden furniture produced by Deesawat Industries.



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Deesawat's decking strips can be clipped together without the need for nails.



Deesawat's award-winning leaf collection.

ture making is concerned, marketing manager Jirachai Tangkungamwong recalled that during the early days, the factory was involved in the manufacture of classical furniture, using Rosewood.

Today, the 30,000m2 production facility of Deesawat Industries, which is located in Bangkok, is managed by three family members – two brothers

Continued on page 14

KUHNS BROS. Focuses On Kiln-Dried Exports

By Paul Miller Jr.



President Tim Kuhns represents the third generation of Kuhns Bros. Lumber Co. Inc., headquartered in Lewisburg, Pa.



Alecia Gold, lumber sales, and Scott Seyler, vice president of sales and marketing, oversee global and domestic lumber sales.



Jeff Engle loads a container with kiln-dried lumber ready for export.



Kuhns Bros. also exports veneer logs.



Pictured are some veneer logs being loaded for shipments.



With 12 Nyle dehumidification kilns, Kuhns Bros. Lumber Co. has over 750,000 board feet of drying capacity.

Lewisburg, Pennsylvania—For nearly 50 years, Kuhns Bros. Lumber Co. Inc., headquartered here, has succeeded by providing world-class service and quality lumber. In recent years, international marketing and logistics expertise have delivered the same quality lumber to customers across the globe. The firm, which was founded in 1962, specializes in Red and White Oak, Poplar,



These T-sheds help keep lumber that is being air-dried protected from the elements.



Ryan Andrews handles veneer sales for Kuhns Bros. Lumber Co.

White Ash and Cherry lumber (kiln-dried, 4/4 through 10/4).

Although kiln-dried lumber is the company's primary export product, Kuhns Bros. also ships veneer and prime saw logs. The firm can ship dry loads, and offers length-specific orders, pulled and ripped widths, color sorts and S2S services.

Currently, Kuhns Bros. exports nearly 75 percent of its kiln-dried production to more than 13 countries. The company's dedicated export staff provides DET, banding, end painting, container and rail-car loading. Sales are handled by Scott

Continued on page 15

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Solid Reputation Keeps PRIMEWOOD LUMBER Successful



Guy Genest is the president of Primewood Lumber Inc., headquartered in Drummondville, Que. He is pictured with Ghyslaine Cusson, office manager.



Jean-Jacques Bourbeau works in sales for Primewood Lumber Inc.



Salesman Denis Leblanc along with Genest and Bourbeau visits customers in over 25 countries.



This is an aerial view of Primewood Lumber Inc.'s facility located on 10,000 square meters in Drummondville that manufactures over 16 million board feet of hardwood lumber annually.



This is Primewood Lumber's sawmill facility located a short distance from Drummondville in Plessisville, Que.

Drummondville, Quebec—During these tough economic times, a company's reputation could mean everything when it comes to attracting new business. Since its founding in 1988, Primewood Lumber Inc., headquartered here, has seen significant growth thanks to its reputation as a leading hardwood exporter in Canada.

Guy Genest, president of Primewood Lumber, credits a lot of the company's success to the good reputation it enjoys in the marketplace. "When we meet new customers, we like to say we're easy to work with, and that we are recognized for our quality and our flexibility to ship mixed containers," he said. "We are also strong on on-time shipment." The company's geographic location in Drummondville, just an hour's drive from the Port of Montreal, Que., provides a great opportunity for quick over-seas shipment.

Located on 10,000 square meters in Drummondville, Primewood Lumber manufactures over 16 million board feet of hardwood lumber annually. The firm's 2.8 million board feet of kiln-dried inventory includes a wide variety of species such as Hard and Soft Maple, Cherry, Walnut, Ash, Red and White Oak, Red and Gray Elm, Birch, Aspen and Basswood. The company carries all grades and thicknesses in stock from 4/4, 5/4, 6/4, 8/4, 10/4, 12/4 and even 16/4 in some species.

"Our well-managed, constant level of inventory provides the perfect opportunity for our customers to buy just what

Continued on page 16

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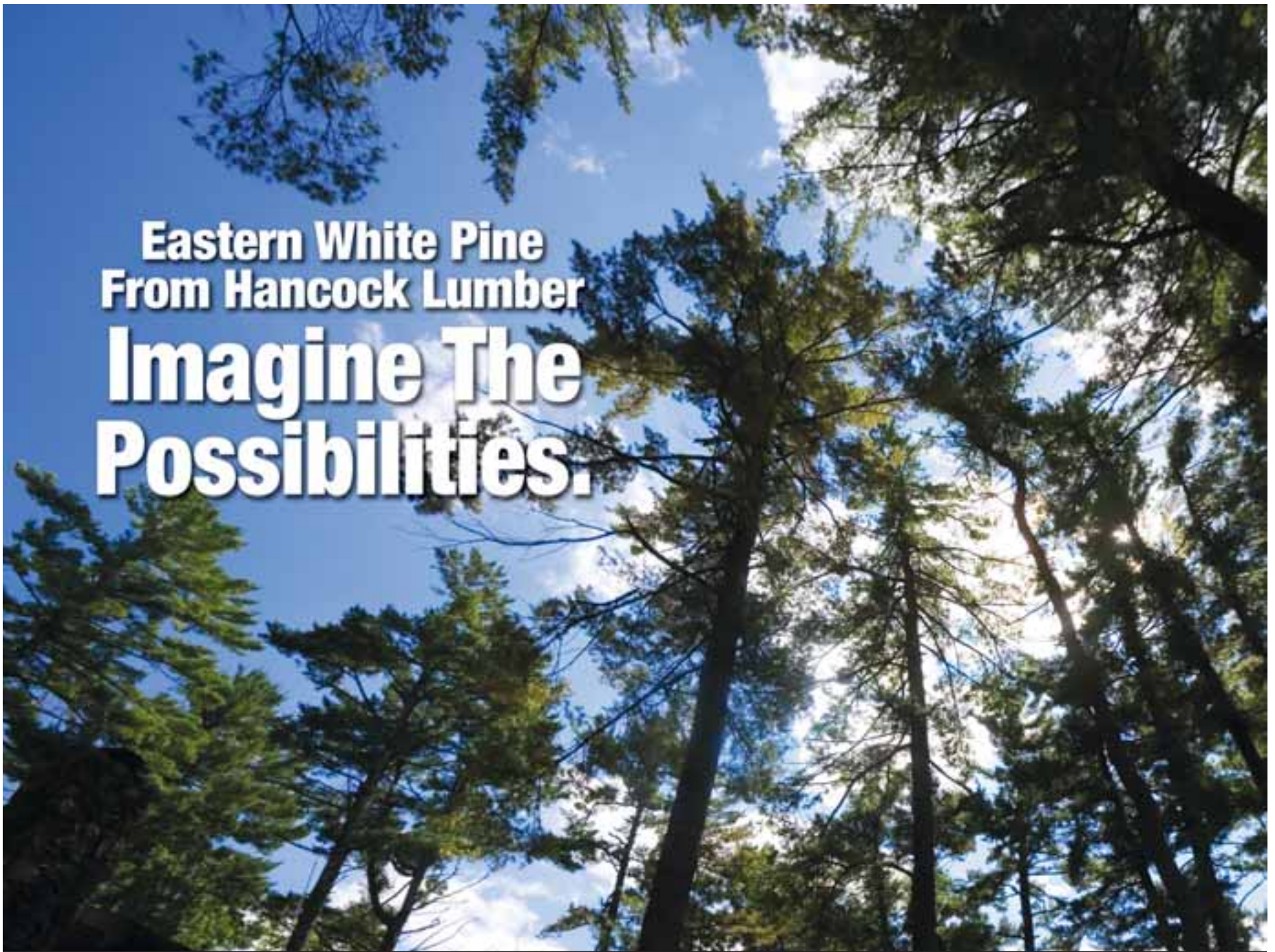
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Primewood also maintains a concentration yard in Pennsylvania that produces all of the company's White Oak lumber.

Pictured is some of the firm's lumber being stored in a warehouse. Primewood boasts over 2.8 million board feet of kiln-dried inventory in over 12 hardwood species and in all grades and thicknesses.





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Tokyo Furniture Fair Continues To Attract Crowds



Furniture manufacturers and buyers comprised some of the 20,000+ who were in attendance recently at the "International Furniture Fair Tokyo (IFFT)/interiorlifestyle living" show held in Tokyo recently.

Tokyo, Japan—The International Furniture Fair Tokyo (IFFT) was reborn recently as "IFFT/interiorlifestyle living." The International



Wood-framed furniture complemented many exhibits at IFFT.

Development Association of the Furniture Industry of Japan (IDAFIJ) hosted the recent furniture show along with Mesago Messe Frankfurt



Norway Design was among more than 400 companies who displayed a plethora of products at IFFT.

Corporation, which until now has been the main host of "interiorlifestyle," held at Tokyo Big Sight each summer. The recent re-introduction of

"IFFT/interiorlifestyle" was basically a merger of two trade fairs offering sophisticated products.

IFFT has been held for the past 23 years and attracts furniture manufacturers, wholesalers of furniture and interior products, architects, architectural designers and building contractors, among others as exhibitors and guests.

Nearly 400 companies exhibited at the recent IFFT with approximately one-third representing international businesses while the rest were domestic in nature. More than 20,000 visitors viewed the products on display at IFFT. Ten seminars were held at IFFT in cooperation with Japantex Fair, some of which focused on exports of furniture made in Japan.

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WHO'S WHO - Guy

Continued from page 2

for the hospitality, architectural, construction and marine industries. The company manufactures custom millwork in any lumber specie desired, and markets its products worldwide, as well as catering to the Caribbean and South Pacific island nations construction needs. East Teak is a member of the National Wood Flooring Assoc., International Wood Products Assoc. and the National Hardwood Lumber Assoc.

Guy began his career 23 years ago, as manufacturing manager of a power cable manufacturer in 1983. He also served in a management position with Pirelli Cable Corp., a manufacturer of medium and high voltage power cable distributed throughout the world.

Guy is a graduate of Abbeville High School in Abbeville, S.C., and received EMT/paramedic certification from Piedmont Technical College in Greenwood, S.C. He is widowed, and has one child and two grandchildren. Guy enjoys his customers, playing golf, fishing and spending time with his grandchildren.

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Facts about the JIM C. HAMER COMPANY

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- Straight line ripping & S2S Planing services
- Container, Rail, & flat bed shipping

IBS PHOTOS - Continued from page 1



Chris Retherford, Columbia Cedar Inc., Kettle Falls, Wash.; and Todd Fox, Lazy S Lumber Co./Panel Crafters, Beaver Creek, Ore.



Doug Clitheroe, WRCLA, Maple Ridge, B.C.; Peter Lang, WRCLA, Vancouver, B.C.; and Paul Mackie, WRCLA, Mill Creek, Wash.



Craig Combs, PPG Machine Applied Coatings, Medford, Ore.; David Jeffers, PPG Machine Applied Coatings, Raleigh, N.C.; and Patrick Hanulak, PPG Machine Applied Coatings, Pittsburgh, Pa.



Dave Bond, Cedar Creek Lumber, Broken Arrow, Okla.; Dan Griffith, Teal Jones Group, Surrey, B.C.; Pat Miller, Cedar Creek Lumber, Carrollton, Texas; and Kory Klein, Cedar Creek Lumber, San Antonio, Texas



Kerlin Drake and Tom Diem, Anthony Forest Products Co., El Dorado, Ark.; and Randal Forsberg, D.A.C. Inc., Fountain Hills, Ariz.



Digges Morgan and Russell Richardson, Southern Forest Products Association, Kenner, La.; Kim Drew, Southern Pine Council, Kenner, La. and Richard Wallace and Edmund DeJarnette, Southern Forest Products Association



Doug Martin, Pollmeier Inc., Portland, Ore.; and William Qian, Missouri Walnut, Joplin, Mo.



Scott Edwards, Carolina Stair Supply Inc., New Philadelphia, Ohio; and Randy Betton and Chad Henry, Carolina Stair Supply Inc., Uhrichsville, Ohio



Shan Yang and Peter Feng, Country Wood Flooring, City of Industry, Calif.



Scott Chapman, Edwin Medero, Jody Craig and John Austin, Gulf Coast Shelter, Daphne, Ala.



Jean-Marc Dubois, Nordic Engineered Wood Products, Albany, N.Y.; Tony Saad, Nordic Engineered Wood Products, Toronto, Ont.; Andrew Dingman, Nordic Engineered Wood Products, Peach Tree City, Ga.; Albert Renaud, Nordic Engineered Wood Products, Montreal, Que.; and Todd Lindsey, Eastern Engineered Wood Products, Bethlehem, Pa.



Larry Davis, EcoSIP Industries Inc., Duncan, B.C.; Doug Auer, BC Wood Specialties Group, Langley, B.C.; and Kim Johannsen, EcoSIP Industries Inc.



Mike Hoag, Bluwood/National Industrial Lumber, Columbus, Ohio; Steve Conboy, Bluwood/National Industrial Lumber, Southern California; and Mark Vuozzo, Bluwood/WoodSmart Solutions, Inc., Southern California



Steve Jones, Bluwood/WoodSmart Solutions, Inc., Richmond, Va.; Jack Opdyke, Mid-Atlantic Bluwood, Lebanon, Pa.; Charles Morando, Bluwood/WoodSmart Solutions Inc., Boca Raton, Fla.; and Pat Bischel, Bluwood/WoodSmart Solutions, Inc., Northern Crossarm Co., Chippewa Falls, Wis.



Rusty Logue, Battle Lumber Co. Inc., Wadley, Ga.; Linwood Truitt, Beasley Forest Products Inc., Hazlehurst, Ga.; and Terry Miller, Import/Export Wood Purchasing News, Memphis, Tenn.



Tommy Manshack, Boise Cascade LLC, Dallas, Texas; Todd Turnwall, Universal Forest Products, Dallas, Texas; and Drew Kappus, Boise Cascade LLC, San Antonio, Texas



Doug Clitheroe, Interfor, Maple Ridge, B.C.; Paul Mackie, WRCLA, Mill Creek, Wash.; Janet Wheeler, Interfor; and Carlos Furtado, Sawarne Lumber Co., Richmond, B.C.



Denny Huston, Boise Cascade LLC, Boise, Idaho; Tom Hart, Boise Cascade LLC, Denver, Colo.; and Don Sharry, ProBuild, Denver Colo.

At NAWLA, Mission Of SEC Discussed



Softwood Export Council (SEC) members work at the American Softwoods booth at the WoodMac trade show recently in Shanghai.



The Evergreen Building Products Assoc., an SEC member, conducts an educational seminar on U.S. Softwood products at a recent China seminar tour.



The SEC Species Grades manual is one tool used by the organization to further the use of American Softwoods worldwide. The SEC promotes American Softwoods in 10 languages and on its association website.

Chicago, Ill.—Among the speakers at the recent NAWLA (North American Wholesale Lumber Assoc.) Traders Market® was Craig Larsen, president of the Softwood Export Council (SEC), a non-profit trade federation comprised of trade associations, groups and other state agencies. The SEC is also a cooperator with the USDA and its Foreign Agricultural Service (FAS).

Additionally, SEC partners with APA-Engineered Wood Assoc., the Southern Pine Council, American Hardwood Export Council and the American Forest & Paper Assoc.

The American Softwoods is the international marketing brand used by the Softwood cooperators. American Softwoods has an international marketing staff with offices located in Tokyo, Shanghai, Mexico, London and Madrid.

At the Traders Market, Larsen reported on the SEC's activity and explained that the organization promotes U.S. Softwood products in international markets. "We annually secure FAS funding in two programs – the Foreign Market Development and the Market Access Program (MAP)," he said.

FAS funding is used on target activities that benefit member organizations and member companies.

Larsen noted that the marketing focus for 2008 at SEC was on structural uses and interiors. For structural uses, the concentration has been on wood frame construction and concrete forming and supports. The areas of focus have been Japan, Mexico, Middle East, Korea and the United Kingdom.

For non-structural use the focus is on interiors, furniture, windows, doors, millwork and moulding and secondary products/components. Areas of focus are China, Vietnam, European Union, Mexico and the Middle East.

According to Larsen, U.S. lumber exports trended up in 2008 (at presstime) compared with exports from other countries. East Asia and the Middle East followed in second place, and overall, exports globally were up an average of 4 percent, although both the European Union and Southeast Asia trended down from previous years.

Large increases in the amount of

exports of U.S. Softwood were recorded by Pakistan, UAE, Thailand, Vietnam, Chile, Korea and the UK, according to Larsen's report. However exports of Southern Pine from the U.S. over the past year trended down an overall average of 4 percent to Mexico, Spain, Taiwan and China. There was a significant surge in exports in 2008 to the Dominican Republic, however, as well as to Jamaica.

Continued on page 16

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IBS -
Continued from page 1

approach” to home building – combining modular and panelized systems – foreshadows the industry’s future.

In addition to the latest products on display in the exhibition hall, featured guest speakers shared their insight and 250 educational seminars were available for attendees. Among the many seminars, these are some samples: One Size Does Not Fit All: Managing Generations In The Workplace; Data Driven Design: Developing Plans That Create Customer Loyalty; and Workforce Housing That Works.

Among the guest speakers were: Andrew Winston, founder of Winston Eco-Strategies, who spoke about “Turning Green To Gold: Environmental Business Practices Drive Long-Term Growth”; Kevin Freiberg, founder and CEO of the San Diego Consulting Group Inc., whose

address was entitled “Seven Essential Choices To Skyrocketing Success”; and Peter Hart, a highly regarded analyst in the U.S., who spoke on “Changing Rules You Can Capitalize On.”

During IBS, the National Association of Home Builders (NAHB) conducted its annual Green Day, a professional development presentation. From assistance in exploring employment opportunities in challenging times to discussing career trends in residential construction, Green Day also highlighted new earth-friendly programs, products and services.

Attendees and guests were also treated to several social networking opportunities during IBS and enjoyed various entertainment options, including a reception with live musical entertainment presented by The Beach Boys.

FREIGHT/LOVETT -
Continued from page 1

that time remained relatively good. With the current economic downturn, export shipments are affected the same as domestic shipments.

While shipping rates have recently decreased about 5 percent per month due to the current cost of oil, when asked for a rate comparison against 2007 rates, Lovett states that current rates are still 25 percent higher today. As for the current demand for container shipping he commented that it was slow moving. “The demand is very weak right now. Our customers – even our largest ones – are all experiencing about a 40 percent decrease in container shipping across the board,” he explained.

Lovett’s view of the factors involved in current market conditions include the price of oil, over production, and lack of demand. “One of the challenges is that when the price of oil

goes up, the day after, the price of a container will go up,” stated Lovett. “Currently oil is back down to \$45 USD a barrel and we haven’t seen the immediate reaction. Even at the gas pumps, when oil was around \$40 USD a barrel two years ago we were paying approximately \$2 a gallon, but we’re not paying that now,” he said. Lovett believes that there are too many companies, or companies have over produced, and now there is too much product and not enough demand. “At least when the supply is not there, they can get a fair price,” he said.

When asked about Transit King City’s plans to adjust to the current market conditions, he said that they have already made some important adjustments. “We had to scale back 25 percent of our staff and are prepared to buckle down in 2009, and we will come out of this a little stronger,” he replied.

Looking ahead in 2009, Lovett’s opinion is the same as the general consensus. “A lot of people are saying it is going to be a tough year and that it may be early 2010 before any of us see improvement. We’ve known some major companies that have gone out of business. Everyone is kind of at a ‘wait and see’ place, waiting for something to happen and right now there is not a lot taking place. It’s sort of like a weeding-out process you might say, and businesses that are not restructured to deal with the current conditions simply won’t be around after 2009.”

FREIGHT/STRUYK -
Continued from page 1

tom fell out. Down 30 percent currently, I expect that number to increase to 40 or 50 percent based on what I’m hearing from my clients.”

When asked for a comparison to previous recessions Struyk replied, “This is different. In previous years, when things were slow in Japan for example, they might be better in Taiwan or Korea, but now it’s slow across the board.”

He expects rates will come down even more as we move into '09. “I don’t think we’ve hit rock bottom yet. I think by the end of the first quarter we’ll find even lower rates. They won’t go back to the record numbers they were two years ago because imports are off. Historically the Trans Pacific has always been the most profitable trade lane. Business is cut in half because their rates are down to \$2,500 a box. They can’t cut the rate back to \$300 dollars just to get the box back to China so they can fill it up with something at \$5,000, they can only go so low. They may drop another 10 percent, but that will probably be about it,” Struyk said.

Struyk feels the housing industry, banks, consumer confidence, the global economy and the media all fac-

Continued on page 13

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FREIGHT/STRUYK -

Continued from page 12

tor into today's marketplace. "We've been in a real estate crash for three years now and that's finally taken an effect on the industry. Plus we're shipping lumber to Shanghai and Vietnam, and while they ship it back in a manufactured product, their economy is ours; we are a global economy. No one is building houses or furniture. When the housing industry turns around and the banks start lending money again, perhaps consumer confidence will come back. The media plays a big part as well, with the negative stories getting more lead time than the positive," he stated.

However, he is optimistic that by the end of the third quarter of the fiscal year business conditions will improve. "My customers are hopeful for a turnaround by the end of the summer."

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WHO'S WHO - Kukowski

Continued from page 2

offers exacting specifications for widths, lengths, color, proprietary grades, manufacture, surfacing, ripping and packaging. Devereaux's client base includes the flooring, cabinet, furniture and millwork industries in the United States, Canada, Europe, Asia and the Middle East.

Devereaux Sawmill is a member of the American Hardwood Export Council, National Hardwood Lumber Assoc., Michigan Timbermans' Assoc., Indiana Hardwood Lumbermen's Assoc., and Hardwood Manufacturers Assoc. The company is also an active participant in the Sustainable Forestry Initiative (SFI). Kukowski serves as his company's SFI coordinator and on the Michigan SFI State Implementation Committee. In his current position, Kukowski handles export and domestic sales, and aids in green lumber procurement. He

began his career in 1985 as a lumber handler, and has held other responsibilities including general laborer, green and kiln-dried lumber inspector, green lumber buyer and sales representative.

Kukowski received a bachelor of business administration in marketing from Davenport University in Grand Rapids, Mich. He and his wife of 13 years, Stacy, have two children. Kukowski enjoys participating in multiple sporting activities and coaching youth sporting teams.

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WHO'S WHO - Yuhas

Continued from page 2

and No. 1 Common). The firm caters to the export business, and offers straight line ripping, hit or miss surfacing and strips.

Salamanca Lumber is a member of the National Hardwood Lumber Assoc., Penn-York Lumbermen's

Club, Ohio Forestry Association Inc., Indiana Hardwood Lumbermen's Assoc. and the Canadian Lumbermen's Assoc.

Yuhas has been involved with the forest products industry for 34 years. He received a bachelor's degree from the University of Buffalo, and began his career as a slab piler. Yuhas has held his current position for 23 years.

Yuhas and his wife, Betty, have four children, Kimberly, Alex, Barbara and Michael. He enjoys hunting, playing golf and fishing.

DEFORESTATION -

Continued from page 2

progress was made on a number of issues that are important in the short run – up to 2012 – particularly for developing countries, including adaptation, finance, technology and reducing emissions from deforestation and

Continued on page 14

WHO'S WHO - Hawkinson

Continued from page 2

Red Oak (4/4, 5/4 and 6/4) and Hickory (4/4 and 5/4). The company also markets Walnut, Red and White Oak and Hickory veneer logs, and quarter and rift sawn White Oak (4/4). Hawkeye Forest Products is an active supplier to distribution yards, end users and customers in the Japanese and European markets. The firm offers mixed truckloads and container loads, and specializes in gang ripped flooring blanks in No. 1 and No. 2 Common and Rustic Black Walnut and White Oak.

Hawkeye Forest Products is a member of the National Hardwood Lumber Assoc., Lake States Lumber Assoc., Indiana Hardwood Lumbermen's Assoc. and the American Hardwood Export Council.

Hawkinson grew up in the family business, but began working there full time in January 1999. He has held numerous responsibilities including dispatching green and kiln dried lumber, as well as purchasing. Hawkinson has been involved with sales for eight years.

Hawkinson graduated from Boise State University in Boise, Idaho, with a degree in business. He also competed on the wrestling team. Hawkinson enjoys anything outdoors especially white water rafting, spending time with family and friends and snowboarding.

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DEFORESTATION -

Continued from page 13

forest degradation.

In addition, the conference discussed in detail the issue of disaster management, risk assessment and insurance, essential to help developing countries cope with the inevitable effects of climate change.

MCLENDON -

Continued from page 3

durable products. These species and products are already recognized for their unique wood properties, quality, durability and value. Now we have the added selling point that all imports are legal and, in these times of focusing on the carbon consequences of our actions – wood is undoubtedly the

most carbon-friendly choice an architect can make.

The bad news for them (and us) is the lack of market demand. Everywhere. All their major markets, Middle East, Europe, Japan, U.S. and Mexico are experiencing economic downturns. Many sawmills and plywood mills are operating at 20 to 30 percent capacity. Others have closed their doors. Sound familiar?

These challenging times call for U.S. importers to accentuate the positives. Think about it for a minute. Imported wood is consumer friendly – a value proposition for U.S. consumers and producers in a time of great need. Imported wood is socially responsible – delivering important benefits to the world's most sensitive forest dependent communities. Imported wood is naturally durable – outperforming temperate species and substitute products time and again. Imported wood is an architect's dream – expanding opportunities to stir the imagination through new and exotic

uses of wood products. There truly is no reason not to increasingly use these unique and beautiful woods.

IWPA's upcoming World of Wood 2008 Convention, March 25 to 27, at the Miramonte Resort & Spa, Indian Wells, California, will bring 250 U.S. importers and users, overseas suppliers, and logistics experts together around the simple but serious theme of "Buying. Selling. Surviving." Use these two days to save money by seeing all your key suppliers in one location. Use these two days to learn how to navigate and



survive the turmoil that we all expect in 2009. Spend 10 minutes at www.iwpawood.org reviewing the schedule and you will quickly see why investing in your business at the end of March by attending the convention could make the difference for you in 2009.

DEESAWAT -

Continued from page 4

and a sister with their mother at the helm as managing director.

Each year, the factory churns out 200-250 containers of furniture and building materials, 80 percent of which are exported to the USA, Europe, Japan and countries in the Middle East.

According to Tangkungamwong, the bulk of the raw materials used for the manufacture of furniture and building materials comprise Teak with American timber accounting for 20 percent of the factory's total wood requirements. "On the average, we import two to four containers of wood from the USA each month," he said.

The American timber species of White Oak and Hickory are delivered to the factory in FAS and No. 1 Common grades and they come in random sizes.

Tangkungamwong said the company had been importing wood from the U.S. for more than 10 years. "Initially, we used the American wood for the manufacture of flooring material because of the market trend in Asia which was the preference for light colored floors.

"At first, we used a lot of American species but many of them were gradually phased out because they were found unsuitable for use due to the local climatic conditions. Over here, the humidity is high while the moisture content of the American timber is low so this leads to bending or warping of the wood which makes the floor uneven."

So far, the company has not encountered major problems with the use of White Oak and Hickory as far as product quality and deliveries are concerned.

At Deesawat Industries, the focus is on the manufacture of contemporary furniture items, which are targeted at the medium to high segment of the market. Garden furniture produced by the company consists of the Boston Collection, Riviera Collection, Frankfurt Collection, Noon Collection and the Manhattan Collection.

Classical doors involve a blend of high quality wood, the company's rich experience in woodcarving and modern wood processing technology. They come in various models like the Montana, Somerset, Boulevard, Imperial, Westminster and many others, which are either totally wood or a blend of timber and glass.

Customers can take their pick of a wide range of flooring material produced by the company. Apart from parquet pieces, there are lamparquet, random strip flooring as well as fanciful mosaic flooring models that come with impressive looks such as the Haddan Hall, Star Flooring, Domino and Finger Block designs.

Teak decking comes with a revolutionary plastic locking system fitted to the underside that allows them to

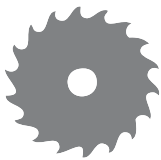
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DEESAWAT -

Continued from page 14

clip together without the need for nails.

The wide range of architectural millwork is not limited to items like stair and hand rails, skirtings, cornices and wall panels. The company also has other items to offer like door and window frames, wall panels, as well as boating and yachting accessories.

Quality and design are the forte of the factory and these have enabled the company to receive numerous accolades such as the Good Design Award from Japan, Best Garden Award, Best

DEESAWAT INDUSTRIES CO. LTD.

S M E Award as well as the Prime

Minister's SME Award.

Deesawat Industries is also a member of the Thailand Furniture Industries Association with Tangkungamwong's brother, Jirawat, holding the post of secretary.

KUHNS BROS. -

Continued from page 5

Seyler, vice president of sales and marketing, and Alecia Gold, lumber sales coordinator.

Kuhns Bros. Lumber Co. is located on 135 acres and employs about 70 people. In addition to Seyler and Gold, key employees include Tim Kuhns, owner and president; Dick Kordes, forestry vice president; Rodney Weaver, vice president of operations; and Randy Hettinger, vice president of by-products.

Kuhns Bros. manufactures more than 18 million board feet annually of green and kiln-dried hardwoods and softwoods, logs, landscape mulch and playground surfacing. The company operates three sawmills, one hardwood and two softwood, and 12 Nyle DH (dehumidification) dry kilns, which dry 750,000 board feet of lumber per cycle. The lumber is then inspected by certified National Hardwood Lumber Assoc. graders.

The firm carries approximately 400,000 board feet of kiln-dried and 700,000 board feet of air-dried hardwood lumber, with Eastern White Pine and Eastern Hemlock making up the balance.

Kuhns Bros. Lumber can trace its humble beginnings back to 1946, when its current owners' grandfather, Carl R. Kuhns, began sawing timber with a portable sawmill from Montgomery Ward.

"He started small, but his principles were always large," Tim Kuhns said. "He passed down his beliefs, including an honest, straightforward way of doing business and a healthy respect for God's earth, to his twin sons Leonard and Larry Kuhns, who

formed their own logging company." Kuhns Bros. Lumber began in 1962 with three employees and produced 500,000 board feet of lumber annual-

the management of that resource. KBLC foresters and loggers receive Sustainable Forestry Initiative (SFI) training annually.

"Sound forestry management has always been a vital part of our operation. Timberland plays a vital role in water quality and soil conservation, and we apply strict quality standards to our forestry operations in accordance with the principles established by the Sustainable Forestry Initiative of Pennsylvania."

**Tim Kuhns, owner and president
Kuhns Bros. Lumber Co. Inc.**

ly. Sixteen years later, a fully automatic, electric-powered sawmill was added, and produced 6 million board feet of lumber per year.

Over the last few decades, the firm has grown significantly with additional sawmills and kilns added to meet customer demand. Kuhns Bros. Lumber selectively harvests over 5,000 acres of woodlands annually, and employs a full-time staff of foresters to oversee

"Sound forestry management has always been a vital part of our operation," Kuhns said. "Timberland plays a vital role in water quality and soil conservation, and we apply strict quality standards to our forestry operations in accordance with the principles established by the Sustainable Forestry Initiative of Pennsylvania."

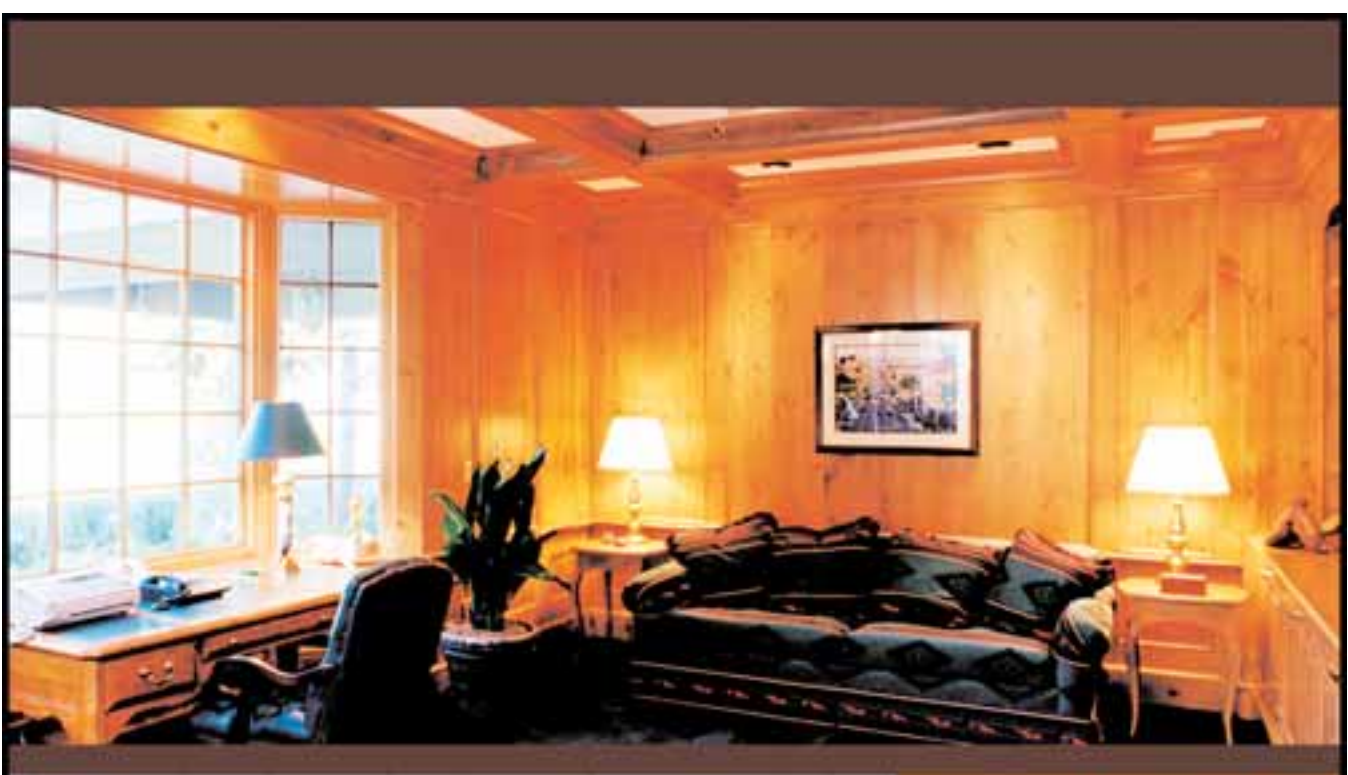
In addition to SFI, Kuhns Bros. Lumber is a member of the National

Hardwood Lumber Assoc., the Pennsylvania Forest Products Assoc., the Pennsylvania Nursery Assoc., American Hardwood Export Council and Appalachian Hardwood Manufacturers Inc.

Kuhns Bros. Lumber's sawmills currently run 36 hours a week. Upon arrival at the mill, all incoming logs are scaled, graded, tagged and sorted. Saw logs are loaded onto the Mellot debarker. An HMC mill sends cants to the re-saw or gang edger. Downstream the PHL re-saw handles all the grade cants via a prepositioner, which turns the best face for the operator to keep production and yield at maximum levels. Then, the PHL operator sends boards back to a Corley edger for edging as well as any cants that have all the grade lumber removed.

Lumber is sent downstream to two NHLA-certified inspectors, and a Morbark Stac-Trac machine picks all the rail ties and pallet cants from the green chain.

Continued on page 16



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KUHNS BROS. -

Continued from page 15

"Loads of lumber are created for green customers, as well as batches of lumber for the kilns," Kuhns said. "(Kuhns Bros. Lumber) makes total use of every log milled, using laser guides to get the most yield from each log. All bark and wood scraps are ground and seasoned in our mulch operations."

The company continued its focus on "total use" several years ago by installing the HMC carriage with an Inovec scanner and an automated sticking/unsticking line to further optimize its log use. Those upgrades, combined with the firm's diverse range of species and a physical location in the middle of some of America's finest forests, has helped its third generation of ownership repeatedly exceed expectations.

Ultimately, Kuhns credits strong family values and a loyal, caring staff with

making the company a success. "We'll never forget our roots, and we remain committed to the principles passed along by 'Pop' so many years ago," he said. "The past continues to show us where we're headed — to a future marked by dedicated service, satisfied customers and healthy forests."

For more information, contact Kuhns Bros. Lumber Co. Inc. at 800-326-9542, visit www.kuhns-bros-lumber.com or e-mail sales@kuhnsbros-lumber.com.

PRIMEWOOD -

Continued from page 6

they need," Genest said. "In addition, we are able to offer many exotic varieties of wood through our partnership with our German affiliate Fritz Offermann Holzimport."

Primewood Lumber processes most

of its lumber via a state-of-the-art sawmill located a short distance from Drummondville. "Nothing is taken with a grain of salt," Genest said. "Every small detail from the moment logs are being cut until the final end product is being looked at with diligence. The numerous bin sorters that we have also give us the flexibility to grade and sort the lumber after kiln



Primewood Lumber Inc.

drying in many different ways (width, color, length) and help us meet the different needs and specifications that customers require."

A concentration yard in Pennsylvania produces all of Primewood's White Oak. "We predry all of our Oak first before kiln drying it, which is a must for us when it comes to drying thick Oak especially," Genest said. "There again, we are only a couple of hours drive from the Port of Baltimore, Md." In addition to Genest, who is the

owner and handles sales, Jean-Jacques Bourbeau and Denis Leblanc, who both work in sales, and Ghyslaine Cusson, office manager, are key employees for the company.

"Cusson has been with the firm since its founding in 1988, and both Bourbeau and Leblanc have been with me for 15 years now," Genest said. "The chemistry between

all of us has always been great from the start."

Genest said he, Bourbeau and Leblanc keep a busy travel schedule, visiting customers in over 25 countries. The operation ships its products mainly to overseas importers located throughout the world in Asia, Europe, Africa, the Middle East, the United States and Mexico.

Primewood Lumber is a member of the National Hardwood Lumber Assoc. and the Quebec Wood Export Bureau (Q-WEB), an organization dedicated to promoting Quebec wood products in the international market.

Within the past few years, the firm has also focused on its commitment to preserving natural resources, Genest said.

"Since November 2006, Primewood Lumber has made a commitment to respect a strict code of conduct regarding the legality and origin of its woods," he said. "Whether it is a single bundle or a full cargo load, our customers can be assured that their order will be prepared and delivered with respect to their needs and directives." In the near future, the company will also be Forest Stewardship Council (FSC) and Programme for the Endorsement of Forest Certification (PEFC) certified.

For more information, visit www.primewood-lumber.com, contact Primewood Lumber at 819-478-7721, or by e-mail to ggenest@primewood-lumber.com.

Primewood Lumber Inc. would also like to extend an invitation to customers to visit their booth during Interzum Cologne on May 13-16.

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NAWLA/SEC -

Continued from page 11



Craig Larsen

Larsen noted that in Japan the housing/construction market is changing due to the Canadian-U.S. dollar equation and the lack of availability of high grade lumber. He also cited

the fact that Euro prices are higher against the Yen and China losing its low-cost edge due to the onset of the

NAWLA/SEC -
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Russian log tax.

Larsen said the market in China is settling and while 5 million housing starts were posted in China over the past year, only 200 were of wood frames. High rise apartments and bare units, he said, are the norm there. However, he added that housing reform is occurring and is marked by higher consumer expectations, higher incomes, a developing middle class — all of which are working together to increase demand in the housing market.

The SEC promotes the U.S. Softwood market in 10 languages and through the association website. For more information, visit the organization's website at www.softwood.org.

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**BUSINESS TRENDS
(ABROAD)**

Guyana

The Guyana Forestry Commission (GFC) and the United States Agency for International Development (USAID) recently hosted a forum to discuss how the U.S. Lacey Act will affect the country's primary and added value producers and exporters, many of whom export to the United States.

Several recommendations were made at the forum including: having access to a check list of requirements to comply with the new provisions; the need for a core set of documentation required for these provisions; and the recognition of national level legislation in determining legality of forest products harvested and traded. Through the GFC, Guyana has made trade relations with international partners a priority for 2009.

In separate news, the Government of Guyana recently launched a technical report, which will form the basis of international support on avoided deforestation and for climate change mitigation and adaptation. The report concludes that while Guyana may see short-term gains from the quick harvesting of its forests, a more long-term strategy is needed.

New Zealand

Trevor Helson, chief executive officer of New Zealand's Eastland Wood Council, said he believes the future of the nation's wood industry is bright, despite conflicting reports.

"There are certainly the doom and gloom merchants out there in spades and, without wanting to imply that they don't have some validity, we shouldn't get overwhelmed by their message," he

said.

Helson's views are based on a recent agribusiness report from Westpac Trust that said, "Lumber markets have deteriorated significantly over the past year with the downturn of housing markets in the U.S. and elsewhere. Meanwhile, log export returns have lifted sharply."

The report continued, "Huge falls in shipping costs and a lower dollar are rapidly helping returns. Recently, log exports recorded their highest monthly value for 15 years. Despite weakening world prices and Russia delaying the introduction of export tariffs until 2010, we remain optimistic log prices will continue to push higher in 2009 as shipping rates and the NZD (the New Zealand dollar) remain favorable."

Helson noted that forests have a number of benefits including maintaining their value unless harvested, leaving a small carbon footprint as a construction material, and

overall sustainability. "We all have to tighten our belts at the moment, but the future of wood is bright," he said.

Netherlands

While average home prices increased in 2008, prices were def-



initely slowed by the economic problems faced nationwide. Average home prices in the

Netherlands increased around 1 percent from the previous year. All types of existing homes showed improvement except detached houses, which fell 1.9 percent.

Finland

According to a recent report by Statistics Finland, the turnover (or revenue) of construction companies

climbed approximately 17.3 percent in the closing period of 2008, compared to the previous year. During the same period, the turnover of building construction companies increased 17.9 percent, while that of engineering construction firms was up by 15.9 percent.

The sales volume of construction enterprises grew by 11.4 percent in 2008, with the sales volume of building construction companies up 13.1 percent. Civil engineering construction enterprises posted a 5.9 percent increase in sales volume.

These growths are likely due, in part, to an increase in building costs. Year-over-year, building costs in Finland rose by 2.5 percent, construction labor costs by 3.3 percent and material prices by 1.7 percent.

Czech Republic

In a recent report by the Czech Statistical Office, construction output at constant prices has declined

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BUSINESS TRENDS (ABROAD)

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1.1 percent year-to-date. Construction output was affected by civil engineering, namely new financially demanding projects of transport infrastructures including repair and maintenance. The decrease in building construction continued, both in new construction and in repair and maintenance.

Planning and building control authorities issued 10,840 building permits for the most recent period — 6,270 for new constructions and 4,570 for renewals and enhancements. Building permits for new constructions grew in non-residential buildings (0.9 percent), while decreases were recorded in environmental constructions (-10 percent), other constructions (-5.9 percent) and residential buildings

(-2.4 percent). Building permits for renewals and enhancements grew most in other constructions (22.6 percent), with declines in residential buildings (-8 percent), environmental constructions (-4.8 percent) and non-residential buildings (-1 percent).

Peru

According to recent published reports, the value of wood exports from Peru climbed 9.6 percent throughout most of 2008, although final figures had not been released as of presstime. While exports to main destination markets have fallen, values rose from \$177.25 million U.S. to \$194.2 million in 2008.

Three main markets (Mexico,



China and the United States) represented 84 percent of total wood exports from Peru. Mexico represented 36 percent, while China received 28 percent and the U.S. 20 percent. However, the Dominican Republic, Italy and Hong Kong seem to be emerging markets for Peru's products. Sawnwood, particularly in Mahogany and Spanish Cedar, were the most exported product.

In other news, Antonio Brack, Peru's Minister of Environment, recently traveled to several European countries seeking funds for environmental conservation. Brack said that Peru hopes to preserve 54 million hectares of tropical forests, which includes protected Indian lands, and will sell carbon credits generated from this land to the international carbon market.

Indonesia

The Indonesian government has quickly responded to new require-

ments presented in the U.S. Lacey Act. Under the law, all products entering the United States must be certified by entities approved by the U.S. government. Martua Sihombing, trade defense director of the Indonesian Trade Ministry, has established a team of officials from the forestry, trade, agriculture, finance, foreign affairs and industry ministries as well as timber trade association representatives to address the issue.

An exporter can choose one of three certificates — Sustainable Forest Management (SFM), Verification of Legal Origin (VLO) and the Chain of Custody (CoC) — when exporting to the U.S. Mohammad Mansyur, Indonesian Pulp and Paper Assoc. chairman, said the nation's pulp and paper industry is ready to comply.

In related news, HSBC, a top British banking group, scaled down lending for forestry schemes in Indonesia due to environmental concerns. Francis Sullivan, the bank's environment advisor, said HSBC will terminate funding to 30 percent of their clients in the forest land and forest products sector in "high risk" countries such as Malaysia and Indonesia due to non-compliance with HSBC's forestry policy.

Japan

During a recent Southsea Lumber Conference in Tokyo, participants noted a slump in the shipment of Southsea logs. Supply conditions were hampered by storms in Malaysia, China sustaining its log purchases and India's sluggish buying trends. New shipments of logs were expected to begin arriving this month.

Southsea log imports were recently reported to be down 31 percent from the previous year's levels. Arrival of lumber products is down 23.6 percent in Malaysia, 20 percent in China and about 39 percent in Indonesia. Prices for logs and lumber have also steadily declined.

Meanwhile, housing starts increased approximately 20 percent in Japan, on pace to meet the 1.1 million housing unit level. The market size for housing renovation, which includes furniture and interior goods purchases, dropped for a second straight year.

Brazil

Several African nations may represent potential markets for the Brazilian solid wood industry as the country seeks alternatives to traditional North American and European sources.

Despite these countries small per capita consumption, their population and economy continues to grow, with imports above the world average. Imports of forest products by African countries could grow by as much as 8 percent annually in coming years. Those imported

Continued on page 19

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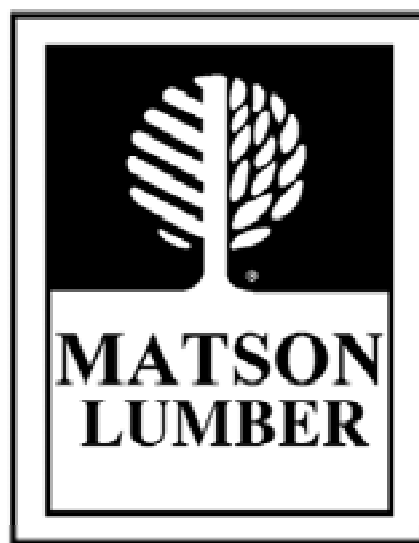
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BUSINESS TRENDS (ABROAD)

Continued from page 18

wood products include plywood, coniferous sawnwood, wood panels and value-added products such as furniture. Besides Africa, China, India, Taiwan and Vietnam, the United Arab Emirates, Qatar and Saudi Arabia are potential new sources.

In related news, the National Institute of Amazonian Research (INPA) recently presented a project designed to create technologies for the utilization of wood waste from sawmills and forest management projects. INPA studied the industrialization of lesser-known tree species in the Amazon to implement the project and conducted technological research on the quality of tree species.

China

The Chinese government recently increased the tax rebate rate of some furniture from 11 percent to 13 percent. All dealers made more efforts to sell their storage and reflow sales capital as 2008 closed, so the price of medium density fiberboard reasonably fell.

The rate change also affected the international market. Dealers have grown very cautious of purchasing West Africa Sapele. Wood imported from Russia through the port at

Manchuria fell approximately 30 percent year-to-date.

In related news, China's annual timber production plan for 2009 calls for 158.57 million cubic



meters of timber and timber output will be 100.39 million cubic meters. The three provinces with the highest logging volume and timber output are: Guangxi Province (19.91 million cubic meters of logging volume, 13.13 million cubic meters of outputs); Fujian (17.43 million cubic meters of logging volume, 12.06 million cubic meters of outputs) and Hunan (15.16 million cubic meters of logging volume, 9.703 million cubic meters of outputs). The logging volume and timber outputs of these three provinces make up 33 percent and 35 percent of the national total, respectively.

Also, the amount of softwood lumber imported from the U.S. by China was set to pass the amount imported in 2007, which was \$30 million. With the final quarter not accounted for, China imported \$22

million from the United States. China has also imported over \$2.3 million in builders carpentry (windows, doors, frames, joinery, mouldings and millwork).

BUSINESS TRENDS (CANADA)

ONTARIO

Conversations heard during the weeks leading up to Christmas 2008 and those that followed focused on the slow business pattern. With the economic slowdown, there were more sawmill and logging company closures, and timber owners held their lumber, awaiting better market conditions. Some sawmills reported they would be shutting down for longer than normal over the holidays. Kilns also closed.

The industry is concerned over the number of logging companies that have closed their doors, or that will do so over the winter months caused by the very slow markets.

Many wholesalers reduced their inventory levels. Flooring sales were also slow, with lumber buying falling off. They stopped or slowed their lumber buying due to large inventories and poor sales of finished goods. It was reported that some flooring manufacturers would not be in production

during the last two weeks of December. The kitchen cabinet sector was not faring that much better, with their reduced demand for hardwoods.

A bit of a bright spot during the last month of 2008 was the falling gas price at the pumps. Gasoline prices have dropped dramatically since September, thus helping with this huge expense for the hardwood lumber industry. Some forecasters predicted that oil could drop as low as \$25 a barrel in 2009.

During the recent U.S. holiday season, log flow was slower. Alder sales, commented some contacts, were also slow. Reduced Alder production tightened availability of lower Alder grades.

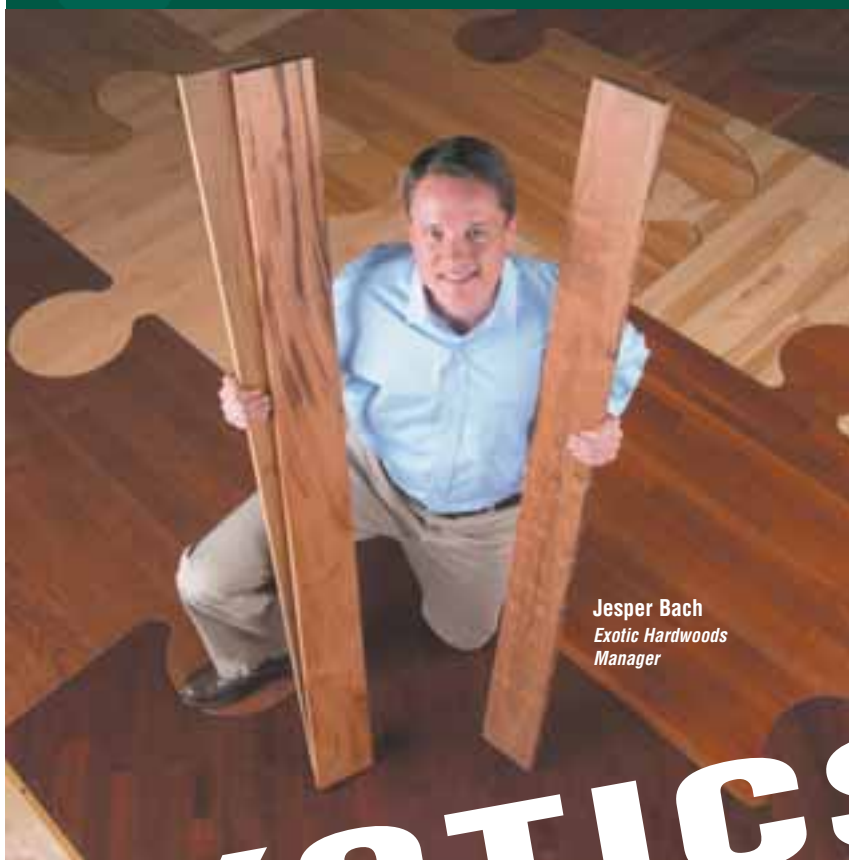
One sawmiller said that Ash was the only item that was moving for him at this time, while another advised that Basswood was his biggest seller. Another commented that Beech buyers were hard to find.

Yellow Birch sales were slower, yet better than many other species due to smaller maintained inventories. Hard Maple, the regionally important species, was moving yet prices were falling. Soft Maple sales varied according to regions contacted.

The Forest Products Association of Canada said in a pre-budget submission, that the forest industry wants the federal government to maintain \$300 million in existing programs, and add a new program worth \$300 million over five years and speed up tax

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**BUSINESS TRENDS
(CANADA)**

Continued from page 19

breaks to create "world-class business conditions." This program would assist in developing technology and commercialize the use of waste wood for bio-energy, bio-fuels and bio-chemicals.

It also wants two existing federal programs which are due to expire next year — one that promotes international forest product sales, and one that supports development of new products — to be extended for five years. The programs together cost \$60 million a year, or \$300 million over five years.

The forestry industry in Canada has lost 38,000 jobs since 2003, and 207 mills have closed. In mid-December 2008 the Finance Minister was preparing a budget for January 2009, and other ministers had indicated that forest products — along with autos and mining — could be among the groups getting support. The forest industry association said its needs were: access to credit; investment tax incentives; investment in research, products and marketing; development of bio-energy; and an extension of the federal work-sharing program beyond the current 38 weeks to preserve jobs and employment insurance benefits.

Canadian wood, pulp and paper producers generate \$80 billion a year and account for more than two percent of

the economy. The companies operate in over 300 communities and provide nearly 750,000 direct and indirect jobs, the association said.

According to reports, a set of priorities for Canada's forest sector might earn



a place in the Federal government's budget. The Finance Minister said consideration would be given to emergency

aid to sectors other than the automotive industry.

The Royal Bank of Canada's (RBC) Economics report revealed that Canada's housing sector is entering a "cyclical downturn", but says the risk of a U.S.-style melt down is remote. RBC's senior economist says many factors that triggered the U.S. housing collapse are either absent or of much lower significance in Canada. He adds the housing market is expected to hold up even as a sluggish economy threatens income growth and erodes consumer confidence.

According to ReMax realtor company, housing prices will fall about 5 percent across Canada by the end of 2009 as a slumping economy takes a bite out of consumer confidence. The biggest drops are expected in major cities in B.C., where prices ran up the highest, and in manufacturing centres in south-western Ontario hit with auto and

manufacturing job losses.

ReMax predicts 2009 sales to be flat and being purely related to consumer confidence as there are a lot of questions over job prospects. The national drop, states ReMax, is driven by smaller centres, such as forestry, oil and gas, and mining and manufacturing towns hard hit by a downturn in the economy that has resulted in layoffs and stalled project development.

In 2009, Kitchener-Waterloo is expected to see a seven percent price drop in housing, a 4 percent drop in nearby Hamilton-Burlington, and the Greater Toronto Area is predicted to see a 2 percent drop. Prices in Regina are expected to rise nine percent, while in Ottawa, Edmonton, Calgary, Sudbury and Halifax are predicted to remain flat. The drop in home prices is good news for first time homebuyers, bringing affordability to the picture.

QUEBEC

Log supply has been impacted by the lack of private timberlands, which has kept loggers out of the forest. One contact reported that demand for the lower grades of Alder was still good, but sellers were struggling to keep the clear grades moving. Alder tightened supplies of the lower grades.

Ash was still moving, but with softer prices. Some commented that selling the whole logs rather than in lumber netted more money. Yellow Birch

orders have slowed down with prices slipping. However, Yellow Birch remained one of the best species for many sellers, especially for those with 9-foot and longer SAP and Better stock. Flooring manufacturers were reported to be purchasing green Yellow Birch. White Birch was being shipped to specialty markets overseas. Most sellers were able to move Hard Maple, the regionally important species, but most complained that prices were very poor.



No. 1 Common Hard Maple was the hardest to sell, while others commented that the No. 2 and 3A Common grades were not selling for them. Wholesalers reported a continued demand for Soft Maple logs. Those selling Red Oak lumber said all items for this species were slow to sell, however the thicker Red Oak stocks were a bit easier to sell. Sales of White Oak lumber were down due to slower export demand. Walnut sales are more difficult to come by, as the lower grades of this species was a non-seller commented one sawmiller, caused by reduced kiln production leading to less downfall and tightened availability of mixed frame stock.

The PricewaterhouseCoopers Global

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