



JAPAN MARKET PROFILE

JAPAN: FOREST PROFILE¹

Japan is very heavily forested at 70% of its total land area, or 25M hectares (mha) of its 37 mha total. This 25 mha can be broken down into 23 mha of closed forest area, with 10 mha of planted forests and 14 mha of natural forests. Japan has one of the highest percentages of forest cover of the developed countries. However, because of the very high population density in this small country, the forest area per capita is only about 0.2 hectares, which is one quarter of the world figure.

	Land area	Forest Cover 2000	Distribution of land cover/use % (1995)		
	'000 ha	'000 ha	Forest	Other Wooded Land	Other land
Japan	37,652	24,081	64.0	2.9	33.2
Asia	3,084,124	547,791	17.8	4.6	78.3
World	13,139,618	3,869,453	29.4	11.2	58.6

About 40% of Japan's forest area, more than 10M hectares, consists of plantations. Major plantation species are cedar, cypress and pine in most parts of Japan; to note specifically Sugi (Japanese Cedar) (*Cryptomeria japonica*) and Hinoki (Japanese Cypress) (*Chamaecyparis obtusa*) which were planted during the 1950's under the assumption of intensive management for high-quality timber. The total growing stock in Japan's forests has been calculated at 3.5Bn cubic meters, and a good half of it consists of softwood species in man-made forest plantations. About 42 % of forests are in public ownership, and 58 % of forests are private. Japan has more than 2.5M hectares of land in formally protected areas. Included in this total is a network of specific forest reserves.

JAPAN'S FOREST DISTRIBUTION

In general, the species distribution in terms of areas is as follows: about 50 % predominantly coniferous, more 42 % - predominantly broadleaved, 7.4 % mixed forest stands, and about 0.6 % predominantly bamboos. Japan's climate is very different from north to south, and gives rise to various kinds of forests. Japan's forests are classified into five types:

Sub-tropical zone forest covers Ogasawara and the southwestern islands, where the average temperature is 21°C. Sub-tropical trees and mangrove grow here.

Warm temperate zone forest located in Kyushu and Shikoku, and in the southern part of Honshu, where the average temperature is from 13°C to 21°C.

Cool temperate zone forest in the central and northern parts of Honshu and the Oshima Peninsula of Hokkaido.

Mixed forest of coniferous and deciduous broad-leaved trees, where the average temperature is almost the same as in the Cool temperature zone forest. It is located in the lowlands north of the Oshima Peninsula.

PRODUCTS AND TRADE

Japan is a major consumer of wood and paper products. It has extensive domestic forest product processing industries, which utilize a large quantity of imported raw materials. Japan is one of the world's largest importers of forest products and by far the largest importer of tropical logs and wood products. Japan's forest industries are generally characterized by large, modern, technologically advanced mills. Nonetheless, a number of smaller, older sawmills still operate. Harvesting in Japan's own forests is well below sustainable levels of growth and production due to the very high costs of extraction.

JAPAN: QUICK FACTS

Japan is the largest importer of softwood logs and lumber in the world. The softwood market is mainly oriented towards housing construction materials. Japan imports about 44% of the annual consumption of 34M m³ of softwood logs.

¹ Source: World Forest Institute. <http://www.worldforestry.org/wfi/world-forests.htm>

JAPAN MARKET PROFILE



JAPAN TRADE OVERVIEW

Japan Export Statistics

Commodity: Total Wood Products

Value: \$1,000,000

Partner Country	2003	SHARE	1YRΔ	5YRΔ
Reporting Total	7,954.0	100.0%	5.6%	-6.0%
Canada	1,105.2	13.9%	-1.5%	-23.3%
China	1,090.3	13.7%	18.9%	73.3%
Indonesia	940.8	11.8%	-8.8%	-20.4%
Malaysia	886.5	11.1%	2.2%	-17.9%
United States	743.3	9.3%	-7.4%	-52.0%
Australia	486.8	6.1%	16.4%	27.1%
Russia	455.1	5.7%	13.0%	-6.9%
Finland	320.3	4.0%	23.1%	84.0%
New Zealand	319.4	4.0%	12.6%	19.7%
Sweden	280.8	3.5%	14.4%	53.5%

Japan Import Statistics

Commodity: Total Wood Products

Value: \$1,000,000

Partner Country	2003	SHARE	1YRΔ	5YRΔ
World	9,908.4	100.0%	7.3%	-8.4%
Canada	1,313.4	13.3%	1.3%	-24.0%
China	1,216.6	12.3%	17.1%	56.0%
Indonesia	1,159.7	11.7%	-4.9%	-20.3%
Malaysia	1,070.8	10.8%	2.4%	-17.2%
United States	925.5	9.3%	-8.0%	-54.2%
Australia	636.9	6.4%	8.5%	17.3%
Russia	600.2	6.1%	14.9%	-5.7%
South Africa	376.0	3.8%	25.4%	86.0%
New Zealand	367.5	3.7%	10.0%	2.4%
Finland	356.6	3.6%	32.7%	74.1%

TOP IMPORTED PRODUCTS

JAPAN IMPORT STATISTICS FROM WORLD				UNITS: \$1,000					
TYPE	HS	DESCRIPTION	2001	2002	2003	1YR Δ	5YR Δ	% Share	
ALL	44+94	Wood + Furniture	11,388,955	10,717,325	11,495,929	7.3%	-4.3%	100.0%	
ALL	44	ALL WOOD PRODUCTS (EX-FURNITURE)	9,853,183	9,235,326	9,908,415	7.3%	-8.4%	86.2%	
TOTAL PRIMARY			8,500,406	7,886,291	8,263,239	4.8%	-14.0%	71.9%	
PRIMARY	4407	Lumber	2,689,406	2,437,521	2,668,115	9.5%	-11.2%	23.2%	
PRIMARY	4412	Plywood & Panels	1,699,648	1,739,068	1,725,110	-0.8%	-10.4%	15.0%	
PRIMARY	4401	Fuel Wood & Wood Chips	1,762,262	1,669,050	1,714,478	2.7%	-10.2%	14.9%	
PRIMARY	4403	Logs	1,876,902	1,599,477	1,650,660	3.2%	-29.0%	14.4%	
PRIMARY	4411	Fiberboard	166,943	148,653	168,290	13.2%	18.8%	1.5%	
PRIMARY	4410	Particle Board	118,393	116,330	131,725	13.2%	7.3%	1.1%	
PRIMARY	4408	Veneers Sheets	91,304	79,215	100,545	26.9%	8.6%	0.9%	
PRIMARY	4402	Wood Charcoal	75,695	76,257	84,098	10.3%	37.1%	0.7%	
PRIMARY	4406	RR Ties	15,529	16,368	15,550	-5.0%	-13.8%	0.1%	
PRIMARY	4404	Hoopwood, Poles, Pickets, Stakes	2,798	3,101	3,147	1.5%	34.1%	0.0%	
PRIMARY	4413	Densified Wood Shapes	1,193	903	1,186	31.4%	-3.5%	0.0%	
PRIMARY	4405	Wood Wool or Flour	333	349	334	-4.3%	-2.1%	0.0%	
TOTAL SECONDARY			2,888,549	2,831,034	3,232,690	14.2%	34.4%	28.1%	
SECONDARY	94	ALL WOOD FURNITURE	1,535,772	1,481,999	1,587,514	7.1%	33.0%	13.8%	
SECONDARY	4418	Builders' Carpentry	480,879	477,206	638,978	33.9%	51.9%	5.6%	
SECONDARY	4421	Articles Of Wood, Nesoi	273,649	280,750	360,725	28.5%	49.9%	3.1%	
SECONDARY	4409	Wood, Continuously Shaped	266,697	251,344	296,114	17.8%	19.6%	2.6%	
SECONDARY	4419	Wood Tableware & Kitchenware	168,056	183,175	185,938	1.5%	14.9%	1.6%	
SECONDARY	4420	Wood Marquetry Etc.	77,351	79,183	80,979	2.3%	13.4%	0.7%	
SECONDARY	4414	Wood Frames Etc.	41,935	41,996	43,636	3.9%	20.7%	0.4%	
SECONDARY	4415	Wood Packing Material	34,828	25,691	28,100	9.4%	23.6%	0.2%	
SECONDARY	4417	Tool & Broom Bodies	6,270	6,711	7,184	7.0%	0.4%	0.1%	
SECONDARY	4416	Cooperage Products	3,110	2,979	3,522	18.3%	28.1%	0.0%	



IMPORT OVERVIEW

Japan is the most heavily import dependent country in the world for forestry products. In 2003, Japan imported over \$11.5Bn worth of primary and secondary forest products to supply its highly urbanized population. The total value of Japanese imports has seen a decline as the country is still recovering from a recession in the early 90's. Imports, by value, were down almost -4.3% from 1999 levels. Secondary and primary categories accounted for 28.1% and 71.9% of import demand, respectively. As evidenced in the chart above, Japan has a very diverse import base of products, with no one category dominating the import market. Major trading partners with Japan are Canada (13.3%), China (12.3%), Indonesia (11.7%), Malaysia (10.8%), and the United States (9.3%). Almost all major trading partners have seen significant decreases in market share as lower cost value-added products from China have made their way into the Japanese market. Imports of Chinese forest products have increased in value by 56.0% over the 5 year period.

PRIMARY PRODUCTS IMPORTS

LOGS

JAPAN IMPORTS: PRIMARY		UNITS: \$1,000			
PRODUCT	2003	% Share	1 YR AGR	5 YR AGR	
PRIMARY TOTAL	8,263,239	71.9%	4.8%	-14.0%	
SW Logs	1,300,611	11.3%	5.6%	-22.6%	
HW Plywood	1,582,521	13.8%	-1.4%	-9.5%	
HW Chips	1,389,561	12.1%	4.6%	-6.5%	
HW Lumber	441,702	3.8%	-4.2%	-25.7%	
HW Logs	349,512	3.0%	-4.9%	-45.8%	
SW Chips	320,676	2.8%	-4.7%	-23.1%	
SW Lumber	209,235	1.8%	25.8%	240.6%	
Other Panel Products	141,291	1.2%	33.0%	149.8%	
MDF	120,113	1.0%	11.6%	11.2%	
Particleboard	84,584	0.7%	27.4%	40.1%	
HW Veneers	77,586	0.7%	18.5%	14.9%	
SW Plywood	53,561	0.5%	-17.4%	-55.7%	
OSB-WB	47,079	0.4%	-5.4%	-24.4%	
SW Veneers	22,959	0.2%	67.0%	-8.3%	
Hardboard	18,284	0.2%	29.7%	36.3%	
RR Ties	15,550	0.1%	-5.0%	-13.8%	

Japan is the 2nd largest importer of hard and softwood logs based on total value in the world, behind China. Japanese imports of logs dropped to 12.6M m³ in 2003, representing a value of nearly \$1.65Bn. Softwood logs accounted for \$1.3Bn in 2003, making Japan the world's leading softwood importer. Hardwood Log imports slid to \$350M in 2003, from 1999 levels of \$645M. Japan has shown a steady decline in imports of logs from 1999-2003, dropping nearly -29% over the period. For some time, Russia has been the leading supplier of logs to Japan, with 40.4% of the market. The U.S. (21.2%), Malaysia (10.4%), New Zealand (11.7%), and Canada (9.1%) are the next largest suppliers. All major trading partners have seen marked declines in Japanese

imports of logs since 1999. The U.S. is no exception, with U.S.-supplied imports dropping 32.4% over the last 5 years.

LUMBER

Japan is the 2nd largest importer of Lumber, behind the U.S. (total value). Japan imported over 8.8M m³ of lumber in 2003, down about -6.2% over 1999 figures. Japan imported \$2.2Bn in SW lumber and \$441M in HW lumber in 2003. The total value of Japanese imports reached \$2.6Bn in 2003, down from \$3.0Bn in 1999. The largest supplier of lumber to the Japanese market has historically been Canada, with 39.3% of the market. However, Finland, Sweden, and Russia have been consistently grabbing market share from the Canadians with 5 year growth of 52%, 56.4%, and 80% respectively. This has led to a collective reduction of imports from Canada of nearly 24% since 1999. The U.S. has seen a huge drop in Japanese interest in hardwood and softwoods with a 63% loss in volume since 1999. The U.S. currently occupies 3.5% of the total Japanese import demand with 311,000 m³ shipped in 2003.

PANEL PRODUCTS: PLYWOOD, VENEERS, FIBERBOARD, PARTICLE BOARD

The demand for building materials slowed down in 2003, except summer demand months. Even though the tax break measures on housing loan interest have been extended until the end of 2003 the impact on the market in the medium term has been slight. Some analysts expect a recovery in the second half of the year but the rapid decline in demand has disappointed suppliers. The only relief is that prices for building materials are holding up despite the drop in demand. Analysts point out that while the cost of import panel products has fallen because of the stronger yen, offers from overseas manufacturers are still a bit limited so supply is on tighter side.

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Japan imported 4.75M m³ of Plywood in 2003, down slightly from 1999 volume (-2.6%). Total value of plywood imports reached \$1.73Bn in 2003. The top suppliers to the Japanese market are Japan's closest neighbors: Indonesia (47.6%), Malaysia (39.5%), and China (7.4%). The U.S. exports a minor amount of plywood to Japan, and has not been able to tap this marketplace. The demand for decorative boards for kitchen cabinet and other panel items is reported as only steady. While the demand for new houses in recent months has been down, demand for remodeling work is growing steadily, and is projected to do so through 2004/05.

Japanese imports of Veneer sheets have shown promising growth over the last few years, with volume reaching 92M m² in 2003. This number is up 10.6% over the period with a 24% gain from 2002-2003. Total value of Japanese Veneer imports reached \$100M in 2003. China, Malaysia, and New Zealand dominate this category with over 80% of the market. The U.S. has experienced a marked decline in exports of Veneers to Japan, as a strong dollar against the Yen made cheaper, partner country products more attractive. The U.S. has lost over 80% of its market share in the last 5 years, along with other strong currency countries such as Germany and Canada. With the influx of raw materials into China, production of value-added veneers filled the import demands of Japan, with Chinese exports growing by more than 74% over the period.

Japan imported 354M kg of Fiberboard in 2003, with Pacific Rim partners (New Zealand, Malaysia, and Australia) supplying the bulk of imports (83.5%). Import demand for fiberboard remained stagnant over the period, while the largest gainer in the market was China; with exports gaining by a factor of 75 since 1999 (9.7M kg). Total value of fiberboard imports grew from \$141.6M in 1999 to \$168.2M in 2003, an increase of almost 20%, while volume remained stable. The MDF market is reporting steady demand for at various densities. Demand in the furniture sector is down as many Japanese furniture manufacturers have moved their plants overseas. According to experts, MDF is gradually taking over the market, once the domain of thin tropical hardwood plywood, because MDF is competitively priced and because of perceived plywood supply problems.²

Particleboard imports into Japan grew by 9.2% over the period to reach 415,000 m³ in 2003, with a value of \$131.7M. Leading suppliers to the Japanese market were Canada (30.8%), Austria (17.7%), Germany (16.3%), and New Zealand (15.6%). Once again, the U.S. saw sliding imports over the period, with a loss of over 66%, ending 2003. Volumes of U.S. particleboard imported never saw sustainable levels to begin with.

SECONDARY PRODUCTS IMPORTS

JAPAN IMPORTS: SECONDARY		UNITS: \$1,000		
PRODUCT	2003	% Share	1 YR AGR	5 YR AGR
SECONDARY TOTAL	3,232,690	28.1%	14.2%	34.4%
Builders Carpentry	634,251	5.5%	33.9%	53.8%
Wood Framed Seats	435,263	3.8%	5.0%	6.1%
Pencil Slats	354,495	3.1%	28.5%	49.7%
HW Flooring, Molding, Siding	213,672	1.9%	15.9%	16.8%
Household/Bedroom Furniture	132,241	1.2%	13.3%	54.9%
SW Flooring, Molding, Siding	87,169	0.8%	23.7%	19.8%
Packing Material	28,100	0.2%	9.4%	23.6%
Office Furniture	10,246	0.1%	-4.0%	15.3%
Cooperage Products	3,522	0.0%	18.3%	28.1%

Japanese imports of secondary products grew by more than 33% from 1999 to 2003, reaching \$3.2Bn. Secondary product imports represent 28.1% of the total import market. Wood furniture is the dominant category for Japanese imports of secondary products with almost half of the demand. As evidenced by the adjacent chart, Wood Framed Seats is the top sub-category for Furniture imports. Japanese demand for furniture has led to significant increases in several categories such as Household Furniture (54.9%) and Office Furniture (15.3%). By

far, the most dominant category for Japanese imports was Builders Carpentry (windows, doors, shingles, and frames), at \$634M in 2003. Japan is also one of the leading importers of HW/SW FMS with \$301 M consumed from foreign sources in 2003. Other top categories for secondary products are listed by total value (\$1,000 USD).

² Source: ITTO

JAPAN MARKET PROFILE



US EXPORTS OVERVIEW

Japan is the second largest export market for U.S. forestry products, based on total value. The U.S. exported just over \$774M worth of primary and secondary forestry products. However, in 2003 this represented a total loss of -51.4% since 1999. The U.S. has lost for than 50% of its market share in Japan over the last 5 years. U.S. exports to Japan have steadily dropped since the Japanese financial crisis in the late 90's. U.S. market share in Japan continues to be eroded, with gains from lower-cost wood suppliers like China, South Africa, and Finland. However, Japan is still the #1 U.S. export market for Softwood Logs (62%), Softwood chips (57.7%), and Wooden Prefabricated Buildings (63.2%), globally.

US EXPORT STATS:		JAPAN		UNITS: \$1,000				
TYPE	HS	DESCRIPTION	2001	2002	2003	1YR Δ	5YR Δ	SHARE
TOTAL	44+94	Total Wood Products + Furniture	1,104,756	841,761	774,893	-7.9%	-51.4%	100.0%
TOTAL	44	Total Wood Products	1,060,262	802,708	743,346	-7.4%	-52.0%	95.9%
TOTAL PRIMARY		Total Primary	949,877	719,719	665,530	-7.5%	-53.6%	85.9%
PRIMARY	4403	Logs	534,840	451,555	452,225	0.1%	-38.6%	58.4%
PRIMARY	4407	Lumber	189,280	130,209	123,296	-5.3%	-57.6%	15.9%
PRIMARY	4401	Fuel Wood & Wood Chips	206,079	121,965	78,736	-35.4%	-79.2%	10.2%
PRIMARY	4408	Veneer Sheets	3,902	3,193	3,063	-4.1%	-57.8%	0.4%
PRIMARY	4410	Particleboard	6,355	4,885	2,523	-48.3%	-81.1%	0.3%
PRIMARY	4412	Plywood & Panels	5,408	2,349	2,322	-1.2%	-33.7%	0.3%
PRIMARY	4404	Hoopwood, Poles, Pickets, Stakes	1,867	2,465	1,975	-19.9%	240.7%	0.3%
PRIMARY	4411	Fiberboard	1,831	2,508	812	-67.6%	-14.1%	0.1%
PRIMARY	4413	Densified Wood Shapes	209	495	484	-2.2%	12808.9%	0.1%
PRIMARY	4402	Wood Charcoal	52	66	94	41.3%	-93.5%	0.0%
PRIMARY	4405	Wood Wool	33	30	-	-100.0%	-100.0%	0.0%
PRIMARY	4406	RR Ties	22	-	-	#DIV/0!	-100.0%	0.0%
TOTAL SECONDARY		Total Secondary	154,880	122,042	109,363	-10.4%	-32.3%	14.1%
SECONDARY	4418	Builders' Carpentry	75,219	55,561	49,247	-11.4%	-35.6%	6.4%
SECONDARY	94	All Wood Furniture	44,494	39,053	31,547	-19.2%	-33.1%	4.1%
SECONDARY	4415	Wood Packing Material	4,709	5,343	12,138	127.2%	308.4%	1.6%
SECONDARY	4421	Articles Of Wood, Nesoi	14,584	10,487	5,178	-50.6%	-74.2%	0.7%
SECONDARY	4417	Tool & Broom Bodies	3,355	2,943	4,389	49.1%	344.4%	0.6%
SECONDARY	4409	Wood, Continuously Shaped	7,443	5,290	3,811	-28.0%	-58.0%	0.5%
SECONDARY	4420	Wood Marquetry Etc.	1,496	1,254	1,282	2.2%	-49.5%	0.2%
SECONDARY	4416	Cooperage Products	1,904	797	856	7.4%	-38.0%	0.1%
SECONDARY	4414	Wood Frames Etc.	1,309	408	591	44.6%	53.0%	0.1%
SECONDARY	4419	Wood Tableware & Kitchenware	366	905	325	-64.1%	-42.2%	0.0%

U.S. EXPORTS- PRIMARY

U.S. PRIMARY EXPORTS:	JAPAN	FACTOR:	VALUE (\$000)	MARKET
PRODUCT	2003	5YR Δ	1YR Δ	SHARE
SW LOGS, DOUGLAS-FIR	\$333,941	-34.6%	-3.9%	43.1%
SW CHIPS	\$65,217	-27.6%	-13.2%	8.4%
SW LOGS, SPRUCE	\$43,983	-42.3%	18.3%	5.7%
SW LUMBER, DOUGLAS-FIR	\$29,973	-72.5%	-21.5%	3.9%
SW LUMBER, SITKA SPRUCE	\$21,755	178.2%	20.0%	2.8%
SW LOGS, WESTERN HEMLOCK	\$20,307	-71.7%	-12.5%	2.6%
SW LUMBER, HEM-FIR MIX	\$13,058	-55.5%	2.3%	1.7%
SW LOGS, OTHER CONIFEROUS	\$11,225	-56.1%	3.0%	1.4%
HW LUMBER, WHITE OAK	\$9,776	-38.6%	18.4%	1.3%

The U.S. shipped out just under \$670M worth of primary forest products in 2003. Exports forest products are heavily weighted towards primary products, with an 85% share of total sales. However, the primary category mirrors overall U.S. exports to Japan with similar losses at the 1 and 5-yr levels. U.S. exports of primary forest products to Japan are dominated by Softwood demand. As noted above, Japan is the #1 and #2 international market for Softwood Logs (62.1%) and Lumber (19.0%), respectively. Softwood

Logs and Lumber export totals came to just over \$570M in 2003. Other primary export categories were Hardwood Chips (although global U.S. exports are down almost 80% in the last 5 years) (20.3%) and OSB/Waferboard (6.8%). Within the Softwood Logs category, Douglas Fir clearly dominated export sales with 43% of the total value of U.S. forestry exports in 2003. Other notable log exports were Spruce, Western Hemlock and Other Coniferous. Within the Softwood Lumber export market, Douglas Fir, Sitka Spruce, and a Hem-Fir Mix were the dominant species.

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U.S. EXPORTS BY GROWTH: JAPAN PRIMARY			
VALUES IN \$1000			
PRODUCT	2003	5YR A	1YR A
HW LOGS, BIRCH	\$1,348	1504.8%	97.7%
HW LUMBER, WALNUT	\$8,958	682.4%	98.3%
HW LOGS, WESTERN RED ALDER	\$121	450.0%	22.2%
HW LUMBER, CHERRY	\$2,240	423.4%	56.3%
SW LOGS, PINE, OTHER	\$591	211.1%	58.0%
HW LOGS, MAPLE	\$2,642	200.9%	-5.4%
SW LUMBER, SITKA SPRUCE	\$21,755	178.2%	20.0%
SW LOGS, SOUTHERN YELLOW PINE	\$9,196	166.6%	3608.1%
HARDBOARD	\$151	65.9%	-82.1%
HW LOGS, CHERRY	\$837	46.8%	-36.8%
HW PLYWOOD	\$1,253	45.5%	14.6%
HW LOGS, WALNUT	\$2,296	43.8%	-0.2%

Although U.S. exports of primary products have been down significantly, several minor log and lumber categories have managed to outpace some of the larger exports. Hardwood products showing strong 5-yr growth over the period analyzed were Birch Logs (1504.5%), Walnut Lumber (682.5%), Western Red Alder Logs (450%), Cherry Lumber (423.4%), and Maple Logs (200.9%). Notable Softwood products over the period were Other Pine Logs (42.2%), Sitka Spruce Lumber (35.6%), and Southern Yellow Pine (33.3%)*.

***Southern Yellow Pine exports jumped over 3,600% from 2002 to 2003, to a total of \$9M.**

U.S. EXPORTS- SECONDARY

U.S. SECONDARY EXPORTS:	JAPAN	FACTOR:	VALUE (\$000)	MARKET
PRODUCT	2003	5YR A	1YR A	SHARE
PREFABRICATED BUILDINGS	\$26,194	-32.2%	3.5%	3.3%
OTHER BUILDERS CARPENTRY	\$18,477	-45.2%	-20.7%	2.3%
WOOD HOUSEHOLD FURNITURE	\$13,319	-60.1%	-24.7%	1.7%
WOOD DOORS AND FRAMES	\$10,838	-27.4%	-3.4%	1.4%
WOOD WINDOWS AND FRAMES	\$10,790	-44.8%	0.1%	1.4%
WOOD PACKING MATERIAL	\$8,319	312.0%	108.9%	1.1%
WOOD OR WOOD FRAME SEATS	\$7,973	-5.4%	-28.4%	1.0%
FSWM	\$7,905	-2.4%	-13.9%	1.0%
WOOD FURNITURE PARTS	\$4,966	274.1%	11.2%	0.6%
WOODEN OFFICE FURNITURE	\$4,347	254.7%	6.7%	0.6%

U.S. Secondary exports to Japan in 2003 dropped to \$109M, a loss of -10.4% over 2002. Over a 5-yr. period, exports of secondary products have dropped more than 32%. With 14% of total forestry exports to Japan, secondary products represent a small segment of the overall trade relationship. The largest product categories within secondary exports were Builders' Carpentry (6.4%), Wood Furniture (4.1%), and Wood Packing Material (1.6%). Japan is the largest global export market for Wood Prefabricated Buildings with 63.3% of the total U.S. export market for that product. All three major sub-categories of Builders' Carpentry are included in

the chart above, with Other BC leading the product category.

Top performing secondary commodities in total value are represented below. Hardwood molding saw the most marked increase over the 5-yr. period, but total volume remained relatively low at \$737,000. Many of the largest secondary export products to Japan also showed strong growth over the period including most furniture products categories, as well as Wood Packing Materials (pallets, cases, and crates) which represents the largest secondary category with positive growth over a 5 yr. period. Wood household furniture, however, saw drastic reductions in total export value, from \$33M to \$13M in the five year period.

U.S. EXPORTS BY GROWTH: JAPAN SECONDARY			
VALUES IN \$1000			
PRODUCT	2003	5YR A	1YR A
HW MOLDING	\$737	1128.3%	97.6%
WOOD PACKING MATERIAL	\$8,319	312.0%	108.9%
WOOD FURNITURE PARTS	\$4,966	274.1%	11.2%
WOODEN OFFICE FURNITURE	\$4,347	254.7%	6.7%
HW SIDING	\$48	17.1%	
FABRICATED STRUCTURAL WOOD MEMBERS	\$7,905	-2.4%	-13.9%
WOOD OR WOOD FRAME SEATS	\$7,973	-5.4%	-28.4%
WOOD DOORS AND FRAMES	\$10,838	-27.4%	-3.4%



SOUTH CAROLINA EXPORTS

HTS	SC EXPORTS TO JAPAN Description	TOTAL VALUE			US 5YR	% SHARE	SC RANK	% SC SHARE
		2003	SC 1YR	SC 5YR				
44+94	Wood + Furniture	10,921,953	86.3%	170.2%	-51.6%	100.0%		
44	Wood	9,941,634	127.0%	150.0%	-52.0%	91.0%	8	1.3%
4418	Builders Carpentry	5,067,102	88.9%	1866.5%	-35.6%	46.4%	4	10.3%
4415	Packing Material	3,529,550	234.7%	4578.9%	308.4%	32.3%	2	29.1%
94+	All Wood Furniture	980,319	-34.0%	1402.6%		9.0%		
4407	Lumber	633,491	44.1%	-80.4%	-57.6%	5.8%	22	0.5%
4401	Chips	283,500			-79.2%	2.6%	7	0.4%
4417	Tools & Brooms	213,523	128.6%	#DIV/0!	344.4%	2.0%	4	4.9%
4409	Wood, Continuously Worked	123,691			-58.0%	1.1%	9	3.3%
4403	Logs	63,969	-41.5%	-90.3%	-38.6%	0.6%	25	0.0%
4420	Marqtry Et;Jwl Cse Et	20,000			-49.5%	0.2%	9	1.6%
4404	Hoopwood;Pickets/Etc	3,750		-37.8%	240.7%	0.0%	3	
4421	Articles Of Wood	3,058			-74.2%	0.0%	26	
4416	Cooperage Products	0			-38.0%	0.0%		0.0%
4411	Fiberboard	0			-14.1%	0.0%	17	0.0%
4408	Veneer Sheet	0			-57.8%	0.0%		0.0%

Japan is the single largest export market for South Carolina forestry products. In 2003, SC exported over \$11M worth of forestry, with Japan representing about 18.0% of the total export market for SC. Comparatively, SC ranked 8th overall (excluding furniture exports) among all 50

states in exports to Japan. Exports to Japan have performed extremely well over the period analyzed with totals up 175.8% from \$4.1M in 1999. Exports to Japan peaked at \$16.8M in 2000, slumped in 2001/2002, and subsequently rebounded to current levels of \$11M. This trend runs completely opposite total U.S. exports to Japan, which were down -51.6% from 1999 levels. The largest categories exported, based on market share, were Builders Carpentry (45.1%), Packing Material (31.4%), Wood Furniture (9.0%), and Lumber (5.6%). These four categories combined represent 93.5% of the total Japan export market. Other Builders Carpentry (Fabricated Structural Wood Members, Shingles, Shakes, and Formwork) dominated the BC category with 99.7% of the market. In the Packing Material category, Cases/Boxes/Crates dominated with 85% of the market. Lumber exports were divided between Other Hardwoods (48.5%), Oak (35.3%), and Southern Yellow Pines (16.2%). Another notable secondary category was Wooden Furniture with almost \$1.0M in exports in 2003. Wood Furniture exports were up more than 1400% from 1999-2003. Leading the category were Bedroom Furniture (89.4%) and Miscellaneous Furniture (6.4%).

Top performing categories were Packing Material (4,578% 5YR), Tools & Brooms (128.6% 1YR), and Builders Carpentry (1866% 4YR). Packing Material growth was the only category consistent with U.S. export growth (308.4%). Slumping categories were Hardwood Logs (-88.3% 5YR), and SW Lumber (SYP, -95.3% 5YR). HW Chips, which reached \$11.5M in 2000, dropped to zero in 2002/2003. SC ranked 4th in total exports of Tools & Brooms, 2nd in Packing Material, and 4th in Builders Carpentry. These categories command 4.9%, 29.1%, and 10.3% of the total U.S. export market to Japan, respectively.



BEST PROSPECTS

BEST PROSPECTS- U.S. PRIMARY

HW LOGS: BIRCH, MAPLE, WALNUT
SW LOGS: SOUTHERN YELLOW PINE, SPRUCE
HW LUMBER: WALNUT, CHERRY, WHITE OAK
SW LUMBER: SITKA SPRUCE
PLYWOOD: HW (441213- at least one layer tropical)
OTHER: HOOPWOOD, POLES, PILINGS, STAKES

BEST PROSPECTS- U.S. SECONDARY

WOOD PACKING MATERIAL: PALLETS & OTHER LOAD BOARDS
WOOD FURNITURE: FURNITURE PARTS, OFFICE FURNITURE
OTHER: TOOLS & BROOM BODIES

BEST PROSPECTS- SOUTH CAROLINA

BUILDERS' CARPENTRY: BUILDERS CARPENTRY, nesoi (441890)
PACKING MATERIAL: CASES/BOXES/CRATES ETC.
WOOD FURNITURE: HOUSEHOLD FURNITURE (BEDROOM), WOOD FRAMED SEATS (UPHOLSTERED)
OTHER: TOOLS & BROOM BODIES



ECONOMIC FACTORS (GENERATING DEMAND)

GDP GROWTH ³

JAPAN: INDICATORS	2000	2001	2002	2003
GDP per head (\$ at PPP)	25,948	26,639	26,944	28,000
GDP (% real change pa)	2.14	0.6	-0.24	2.72
Government consumption (% of GDP)	16.43	17.08	17.66	17.5
Budget balance (% of GDP)	-7.43	-6.08	-7.12	-7.42
Consumer prices (% change)	-0.67	-0.73	-0.92	-0.25
Public debt (% of GDP)	133.06	141.52	147.28	154.62
Labor costs per hour (USD)	22.27	19.61	18.83	20.49
Recorded unemployment (%)	4.72	5.03	5.38	5.26
Current-account balance/GDP	2.52	2.11	2.83	3.16
Foreign-exchange reserves (mUS\$)	354,902	395,155	461,186	663,289

Japan's economic growth hit a 13-year high in the last quarter of 2003. Gross Domestic Product (GDP) grew 1.5 percent, in real terms, in the first quarter (2004) up from the previous estimate of 1.4 percent. Japan is the world's second biggest economy and now looks set to outstrip US growth of 4.4 percent annualized for the same period of January-March. The wider picture reveals that Japan also owes its change of fortune to booming export demand from China and

other fast-growing countries in the region. Recent industrial output figures showed a 3.3 percent rise in April compared to March and reinforced hopes that the recovery is sustainable.

The [Economist Intelligence Unit](#) expects private consumption to remain stable at 56.5% of GDP in 2005, 2006 and 2007, while real personal disposable income will increase by 1.6% in 2005, 1% in 2006 and 0.8% in 2007 (at current market prices). Japanese consumers are expected not to increase their spending until they see tangible benefits from the economic recovery.

CONSTRUCTION SECTOR

Japan is one of the largest construction markets in the world, is starting to emerge from protracted recessions following extensive economic restructuring, particularly in the banking sector. The Japanese construction market is the second largest in the world, and the Japanese Government has a trade policy to positively encourage the import of foreign construction materials and products. Furthermore, it is anticipated that deregulation will help open the market to materials and products controlled by JIS and JAS standards. Despite this, construction activity remains weak and relatively closed to overseas organizations. Japan's construction industry is worth around 450 Bn annually, representing approximately 15% of Japan's GDP. Against the current economic background of rapid change and deregulation, Japan has abandoned its traditional 'scrap and build' approach to construction, which left few buildings over 30 years old, in favor of an approach in which refurbishment and regeneration are considered options.

The Japanese market continues to exhibit strong demand for building materials, and Japanese companies are showing an increasing interest in sourcing more building materials from abroad. Japanese construction companies and trading companies are particularly interested in procuring building materials from the United States and Canada. While Canadian firms continue to dominate the growing Japanese market for structural lumber, U.S. firms dominate the Japanese import market for oriented-strand board, fiberboard, structural laminated wood products, soundproof materials, insulating materials, stone products (marble, granite) and millwork such as wooden windows, doors, and molding. Higher value-added building materials represent the best export prospects for U.S. firms.⁴

³ Source: The Economist, Country Briefings. www.economist.com/countries

⁴ Source: U.S. Commercial Service- Department of Commerce



HOUSING STARTS⁵

Japan's monthly housing starts for June 2004 totaled 106,582 units, which represents a 7.4% decrease compared to June 2003. Year on year starts of single-family and multi-family dwellings and row houses decreased by 8.6%, 6.4% and 5.2% respectively. Year on year 2x4 housing starts increased by 1.9% while prefabricated housing starts decreased 5.6%. The seasonally adjusted annual rate of housing starts in June 2004 increased 0.8% to 1,178,820 units. For the first time in 3 years, Japanese housing starts in 2003 posted a year-on-year increase, with the 1,160,083 starts, up 0.8 percent from the previous year. Wood-framed housing starts jumped 4 percent. Construction of multi-family condominium buildings and prefabricated housing declined.

After over 10 years of a stagnating economy, some analysts are reading the increase in housing starts to mean that Japan can look forward to sustained economic growth in not only the housing sector, but also the wider economy. The following are the principal reasons reported as the basis of the recent turnaround in housing starts.

- 1) Tax incentive program - Home buyers purchase homes in 2003 to take advantage of a 6-year tax incentive program set to expired at the end of December, 2003 that allowed new home buyers to take a tax credit on mortgage interest.
- 2) Interest Rates Bottomed Out – There is a growing perception among prospective home buyers that commercial interest rates for home loans were bottoming out.
- 3) Housing Prices Bottomed Out – Widespread deflationary pressures in the real estate market have pushed down the value of residential lots and buildings to within reach of a larger number of potential home buyers.

Japanese Housing Starts in 2003 (Units)				
Sector	December, 2003	% Change (03/02)	Jan.- Dec. 2003	% Change (03/02)
Total Starts	100,826	+ 9.4 %	1,160,083	+ 0.8 %
-Custom housing	27,507	- 1.5 %	372,652	+ 1.3 %
-Rental housing	41,168	+ 10.5 %	451,629	+ 0.3 %
-Corporate housing	622	- 21.3 %	9,163	+ 1.7 %
-Built-for-sale	31,529	+ 20.2 %	326,639	+ 0.8 %
Wood-Framed	43,586	+ 3.4 %	523,732	+ 4.0 %
Wood Share (%)	43.2 %	- 2.5 points	45.1 %	+ 1.3 points
By Framing Method				
-Condominiums	20,455	+ 30.9 %	200,221	- 3.8 %
-Prefab. Housing (Wood-framed)	13,985 (2,019)	- 6.2 % (- 6.5 %)	159,224 (23,204)	- 1.0 % (- 2.0 %)
2x4 Wood-framed	6,990	- 2.0 %	81,502	+ 3.2 %
By Floor Space (1,000 square meters)				
All Housing Starts	8,721	+ 7.7 %	104,038	- 0.7 %
Wood-Framed	4,398	+ 1.8 %	56,348	+ 2.6 %
Wood Share (%)	49.3 %	- 4.1 points	54.2 %	+ 1.8 points

(Source: Ministry of Land, Infrastructure and Transport)

Traditionally, 80-85 percent of all the solid wood products in Japan are used as building materials in new residential and commercial construction, and civil works projects. Strong housing starts continue to be critical to the wood and building material industries. Total imports of building products to Japan for the five months period from January to May 2004 increased 1.3% to 502.8 Bn yen (about US\$4.57 Bn at 110 yen/US\$), compared to 496.4 Bn yen (about US\$4.28 Bn at 116 yen/US\$) for the same period in 2003. Imports from the United States increased 6.0% to 51.6 Bn yen (US\$468.9 M) from January to May 2004, compared to 48.6 M yen (US\$419.4 M) in the same period in 2003.

⁵ Source: <http://www.fas.usda.gov/gainfiles/200402/146105527.pdf>



TRADE FACTORS (AFFECTING U.S. EXPORTS)

MARKETS

In a summary article assessing the Japanese forestry industry, Ivan Eastin, of CINTRAFOR, identified some prevalent factors leading to recent policy changes within the industry. The lack of competitiveness of Japan's wood producers, continued growth in imported lumber and wood products, and a growing unmanaged timber stock on Japanese national and private forests spurred the Japanese government to review lumber imports and its relation to its depressed wood products market. Since 1955, Japan has seen its self-sufficiency in wood products decline from approximately 95% to below 20% by 2000. While there are a variety of factors that have contributed to this decline, the net effect has been that domestic forest products manufacturers have lost tremendous market share to imported wood products. Similarly, the competitiveness of the forestry sector has declined significantly relative to imported softwood logs. The dominance of the timber market by imported timber has contributed to a fundamental structural change within the forestry and forest products sector. Analysts and politicians have charged that these structural changes in the forestry and forest products sector have not only adversely affected the competitiveness of the domestic forest products sector but that they have severely restricted the ability of forest owners to actively manage forests in Japan, both private and public. In an attempt to rectify this inability to manage its forests and to bolster the competitiveness of its forestry and wood-products industries the Government of Japan has considered a Safeguard.

FORESTRY INDUSTRY: INTERNAL SYSTEMIC ISSUES⁶

Note: Please reference the Japan forestry profile section for further details

- Japan has an unusually high cost of forestry compared to other regions of the world.
- Poor profitability in forestry is due in part to geography, such as steep terrain, which makes forest management challenging and increases the cost of harvest and extraction
- The low profitability is reflected in a Forestry Agency study which estimates that the internal rate of return from a sugi plantation has declined from 6.3 percent in 1965 to 4.1 percent in 1975 to 2.1 percent in 1985 to 0.9 percent in 1993.
- The exceedingly small size of private forests, most around 5 hectares, makes it difficult for owners to raise capital and manage efficiently.
- The depopulation and aging of the forestry and wood products workforce seriously impacts productivity and efficiency of the forestry industry. According to one survey 57 percent of forestry workers are over the age of 55 while less than 10 percent are under the age of 35.

WOOD-PROCESSING INDUSTRY: INTERNAL SYSTEMIC ISSUES

- Japan's harvesting and delivery costs to the mill are now nearly three times more than those costs in the US Pacific Northwest region and six times larger than those in Scandinavia and the southern hemisphere.
- Imported log prices, energy and labor costs combined with a decreasing log processing efficiency results in Japan's sawmills being high cost producers of lumber relative to their competitors.
- Electrical rates for the saw-milling sector in Japan are 3 to 4 times higher than other producers.
- The small size and scale of sawmills in Japan contribute to their lack of profitability. Production cost estimates for 1996 indicate that Japanese costs are approximately 156 percent higher than a sawmill in British Columbia, Canada. While labor, energy, and capital costs are less than 50 percent higher than BC, stumpage prices for sugi are 250 percent higher than hemlock.
- The performance based regulatory environment surrounding the housing industry (Housing Quality Assurance Act and the 10-Year Housing Warranty) is altering the product and species mix, displacing some domestic species. For example, demand for yellow cedar and treated lumber in ground sill (dodai) applications has also increased as a result of the 10-year Housing Warranty.

⁶ Source: http://www.cintrafor.org/RESEARCH_TAB/links/WP/WP87.htm



POLICY⁷

STANDARDS

U.S. manufacturers interested in developing export sales of building materials to Japan should ensure that their products conform to Japanese industry standards. Japanese industries have developed Japanese Agricultural Standards (JAS) for lumber, plywood, and other wood building materials, and Japan Industrial Standards (JIS) for sheetrock, fiberboard, insulation, and other non-wood building materials. While JAS and JIS are not mandatory national standards, products which do not conform to these standards will have very limited market potential in Japan. Below, however, are some industry issues that address specific demand concerns and opportunities for U.S. wood products companies.

ILLEGAL TIMBER TRADE⁸

Japan has primarily adopted two policies to prevent the trade of illegal timber and wood-based products. The first policy is based on the fact that Japan is the main importer of forestry products, while the second policy is based on needs for the producing countries, such as Indonesia, to adopt sustainable forest management. As the largest consumer of forestry products, Japan has launched an intensive campaign on the need to prevent the use of illegally felled timber and its derivative products by Japanese companies and individuals. We expect with these kinds of efforts, Japanese consumers will become more conscious (of the problem) and widely reject illegal products. On the international front, Japan considers the illegal timber problems a global one that needs to be solved together, since it involves a large number of businesses between the importing and producing countries. Trade of illegal timber would not be rampant if there was no demand. What happens now is that demand has outnumbered supply, fueling illegal logging in the producing countries.

The Timber Trade Federation (TTF) has called on Japan to join the efforts of European and North American traders to eliminate illegal timber from their supply chains. On a recent trip to Japan (18-23 November 2003), the TTF's Corporate Social Responsibility Adviser Andy Roby, attended a series of meetings bringing together the private sector, NGOs and policy makers to discuss the UK's experience with the TTF's various initiatives to promote the sourcing of legal and sustainable timber. Japan is the world's top net wood importer (77.6 M m³ in 2000 and its per capita consumption is about 50% greater than the UK.)

SICK HOUSE SYNDROME

On July 1, 2003, the Ministry of Land, Infrastructure and Transportation (MLIT) implemented new regulations restricting the emission of volatile chemical substances. The requirements include testing for formaldehyde on a variety of products, including plywood, particleboard, laminated veneer lumber, laminated wood products, finger-jointed lumber, wood window sashes and doors. Testing will be covered under Japan Agricultural Standards (JAS), regulating most wood products, Japan Industrial Standards (JIS), regulating most industrial materials, and the under the BSL, for products not covered by JAS or JIS.

The new regulatory framework was instituted in response to concerns about sick house syndrome, human health disorders that new homebuyers report resulted from excessive emission of volatile chemical substances in building and furniture products. Three major components of the new regulations are:

- Regulation of chlorpyrifos and formaldehyde and an expectation that the list will expand
- A total ban on the use of chlorpyrifos
- Limitations on the usage of formaldehyde based on the emission level, and test requirements from accredited third-party testing bodies.

⁷ Source: www.fas.usda.gov/gainfiles/200309/145986034.pdf

⁸ Source: www.illegal-logging.info/news.php?newsId=429



COUNTRY INFORMATION SOURCES

GOVERNMENT

Ministry of Agriculture, Forestry and Fisheries of Japan
Email: white56@maff.go.jp
Website: <http://www.maff.go.jp>

TRADE ASSOCIATIONS

All Japan Federation of Lumber Association
Nagatacho Bldg., 2-4-3, Nagata-cho,
Chiyoda-ku, Tokyo 100-0014
Phone: 03-3580-3215
Fax: 03-3580-3226
Email: info@ZENMOKU.jp
Website: <http://www.ZENMOKU.jp>

American Forest & Paper Association
U.S. Agricultural Trade Office
Tameike Tokyu Building
8F 1-1-14 Akasaka
Minato-ku, Tokyo 107
Japan
Phone: 011-81-3-3583-2850
Fax: 011-81-3-3589-1560
E-mail: afpajpn@gol.com

AHEC – Japan
c/o American Consulate General
2-11-5 Nishitenma
Kita-ku, Osaka 530, Japan
Profile: AHEC is the leading international trade association for the American hardwood industry, representing U.S. hardwood products, including - lumber, veneer, plywood, flooring, moulding and dimension materials.
Director: Takahiro Tsuji
Phone: (81) 6-6315-5101
Fax: (81) 6-6315-5103
Email: info@ahec-japan.org
Website: <http://www.ahec-japan.org>

Southern Pine Council- Japan
Toshin Tameike Bldg. 8F
1-1-14 Akasaka,
Minato-ku, Tokyo 107-0052 Japan
Contact: Mr. Steve Corless
Tel: 81 (33) 589-1320
Fax: 81 (33) 589-1560

International Tropical Timber Organization
International Organizations Center, 5th Floor
Pacifco-Yokohama 1-1-1, Minato-Mirai,
Nishi-ku, Yokohama, 220-0012 Japan
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Fax: +81-45-223-1111
Email: itto@itto.or.jp

Japan Forest Technical Association
NO.7, Rokuban-Cho, Chiyoda-Ku, Tokyo 102-0085, Japan
Profile: Forest resources management & development. Training & promotion of forest-related technology
Phone: 3-3261-3866
Fax: 3-3261-6849
Email: JDQ01501@nifty.ne.jp

Japan Lumber Importers' Association
Yushi Kogyo Bldg. 7F, 3-13-11, Nihonbashi, Chuo-ku,
Tokyo 103-0027
Phone: (81) 03-3271 0926
Fax: (81) 03-3271 0928

International Development Association of the Furniture Industry of Japan
Karuko-zaka Tanaka Bldg. 3F, 2-16-1, Kagurazaka,
Shinjuku-ku, Tokyo 162-0825
Profile: Japan's only globally active association with the objective of internationalizing the Japanese furniture industry.
Phone: +81-3-5261-9401
FAX: +81-3-5261-9404
Email: info@idafij.or.jp
Website: <http://www.idafij.or.jp/en/IDAFIJ/index.html>

Japan Houseware Importers Association
3-1 Higashi-Ikebukuro, Toshimaku, Tokyo
Phone: 03-3987-8481
Fax: 03-3987-4163
Website: <http://www.jhi.co.jp/english/english.htm>

Manufactured Imports Promotion Organization (MIPRO)
World Import Mart Bldg. 6F, 3-1-3,
Higashi-Ikebukuro, Toshima-ku, Tokyo 170-8630
Profile: Formed to actively promote the import of manufactured products from countries all over the world. (Japanese website only)
Email: mipro@mipro.or.jp
Website: <http://www.mipro.or.jp/eng/top-e.html>

The ASEAN Foundation
Jl. Sam Ratulangi No.2
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RESEARCH/EDUCATION

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International Organizations Center, 5th Floor
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Fax: +81 45 223 1111
Email: itto@itto.or.jp
Website: <http://www.itto.or.jp/live/index.jsp>

Imported House Industries Organization (IHIO)
Profile: Research and development, technical assistance on foreign building materials for housing in Japan.
Phone: (81) 03-3980-7311
Fax: (81) 03-3980-7312
Email: Mail@ihio.or.jp
Website: <http://www.ihio.or.jp/>

JAPAN MARKET PROFILE



INDUSTRY

International Chamber of Commerce (ICCJAPAN)
Tosho Bldg. 3F, 3-2-2, Marunouchi, Chiyoda-ku, Tokyo 100-0005

Email: kokusai@tokyo-cci.or.jp
Website: <http://www.tokyo-cci.or.jp/>

Japan Plywood Inspection Corporation (JPIC)
HOKKAIDO Inspection Branch
Ota Bldg., 3-25, Sakae-dori, Shiroishi-ku, Sapporo 003-0021
Phone: (011)855-4023

The Building Center of Japan
Profile: The BCJ serves as an incubator for these new building technologies and helps foster their growth in society.
Phone: 03-3434-8138
Fax: 03-3434-5069
Email: kokusai@bcj.or.jp
Website: <http://www.bcj.or.jp/en/index.html>

Maruhon
International Wood Specialists
1295 Nagashima
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434-0013 Japan

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Email: contact@maruhon.com
Website: www.maruhon.com

Sankyo Transportation- Tokyo Lumber Terminal
4-16-13, Tsukishima, Chuo-Ku, Tokyo 104-0052, Japan
Marketing Team

Profile: Operates the Tokyo Lumber Terminal (TLT) which is one of the largest lumber terminals in the world. time.
Phone: 03-5560-0343
Fax: 03-5560-0347
Email: woodproductsgrp@sankyo.fujikigroup.co.jp