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Solid Wood Products

Annual

2000

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Report Highlights: Korea's rebound from its 1998 economic crisis has been remarkable. GDP growth is projected at 8.5 percent in 2000, after reaching 10.7 percent in 1999. As annual timber supply remains around 1.5 million cubic meters (CUM), imports of wood products should increase in response to rising demand in the housing and furniture sectors. Government deregulation on construction sector should encourage greater production of wood based products. Construction of wood frame houses continues to increase, reflecting growing awareness of this type of housing. Over the next 3-5 years, trade volume is expected to continue to grow in tandem with the expanding economy.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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SECTION I. SITUATION AND OUTLOOK

Korea's rebound from its 1998 economic crisis has been remarkable. GDP growth is projected at 8.5 percent in 2000, after reaching 10.7 percent in 1999. The overall size of the domestic market is expected to expand with the country's economic recovery.

Total forested area, about 6.43 million hectares (HA), accounts for 65 percent of the total land area.
Annual timber supply remains around 1.5 million cubic meters (CUM). The CY 2000 roundwood harvest is projected at 1.6 million CUM, the same output as reported for CY 1999. For CY 2001, the outlook for domestic roundwood production is projected to remain constant at 1.6 million CUM, with softwoods (70 percent) and temperate hardwoods (30 percent) maintaining the dominant species harvested.

Government deregulation of the construction sector will encourage local wood related industries to meet higher demand of structural material, built-in furniture and interior. During the first trimester CY 2000, wood products import grew 27 percent over the same period in 1999. The United States exports remain unchanged overall as Korea's increased imports of logs, veneer and plywood has been offset by decreased imports of lumber, particle board, fiberboard and door/window material. The U. S. market share based on value in 1999 dropped to 13 percent after losing roundwood and wood chip markets to New Zealand, Chile and China. The U.S. industry continues to face strong competition, particularly from New Zealand, Chile and China, as Korea still buys products based on price, not quality and durability.

The Ministry of Construction and Transportation (MOCT) has set the CY 2000 goal for new housing starts at 450,000 units. New housing starts in CY 1999 totaled 404,715 units, up 32 percent from 1998, but well below pre-crisis levels. Construction of wood frame houses continues to increase, reflecting growing awareness of this type of housing. The outlook for two-by-four construction is encouraging as deregulation initiatives and building code revisions are favorable for single family and low rise multi-family unit facilities. However, a comprehensive plan aimed at providing balance between development and the environment is raising concern with its impact on land supply for construction. The plan mainly accomplishes the balance objective by addressing the concept of quasi-farmland that is subject to development at the discretion of local administrators. If the plan is fully implemented, most of the existing quasi-farmland will shift to either development, or greenbelt zone classifications.

The Korea furniture and interior markets continue to grow in tandem with the country's economic recovery. New furniture orders show an April 2000 year-over-year increase. The Korea Federation of Furniture Industry Cooperatives (KFFIC) has increased its CY 2000 furniture production projection to 7 percent in response to the current level of expansion in the construction and renovation /remodeling sectors. Furniture and interior wood material demand would include: both hardwood and softwood for furniture, door/windows, kitchen cabinets, flooring, wall panels etc.

Deregulation on apartment selling prices continues to create greater demand for wood flooring. In 1999, the wood flooring market totaled US$450 million for 1.5 million square meters. By 2001, the forecast is for the market to double in size. The most popular wood species used in flooring are: oak, maple, cherry and beech. The standard thickness of the veneer is 0.5 mm.

The Ministry of Environment is supporting a new bill requiring mandatory use of built-in furniture at newly constructed high rise residential apartments. The bill's intent is to reduce furniture waste that results during frequent moves that is common among Korean households. Built-in furniture is primarily made with veneer on panel products such as plywood. MDF and particle board.

The Korea Pallet Association (KPA)forecasts pallet production would increase in CY 2000 to meet higher demand resulting from expanding trade by the country. Domestic producers of plastic pallets report increased output as companies look to minimize replacement costs and damage caused by nails in wood pallets. Further, Australian and French importers are requesting Korean firms use plastic pallets to eliminate potential quarantine problems. KPA, however, anticipates rising crude oil prices will dampen demand for plastic pallets.

In 1999, Korea's support of the Asian-Pacific Economic Council's (APEC) initiated early voluntary sectorial liberalization (EVSL) negotiations on forestry products cooled when other countries, notably Japan, shifted positions in advance of the new WTO round of trade negotiations. Efforts in CY 2000 to revive this initiative within the APEC venue are underway, though local processors remain vocal against Korea's early liberalization of this sector.

Over the next 3-5 years, trade volume is expected to continue to grow in tandem with the expanding economy. Significant expansion in this market is not foreseen over the intermediate period unless tariffs are effectively reduced. The APEC and new WTO round still provide solid venues to accomplish the objective of reducing restrictive tariffs.

SECTION II. NARRATIVE ON SUPPLY AND DEMAND, POLICY & MARKETING

Production

Forest Situation/Outlook

Total forested area, about 6.43 million hectares (HA), accounts for 65 percent of the total land area. Korea's forests are located predominantly in the cool-temperate zone with a small section in the warm-temperate zone along the southern coast.

Most of the domestic growing stock is under 30 years old with the greatest production made up of coniferous trees between 11-30 years old. Small diameter logs (below 30 centimeters) represent 97 percent of total log production. Because timber quality is low and the majority of trees are of small diameter, domestic roundwood is primarily processed into pitprop, which are used in mining, lumber, plywood, and wood chips for pulping.

The CY 2000 roundwood harvest is projected at 1.6 million CUM, the same output as reported for CY 1999. Softwoods comprise 68 percent of the harvest followed by temperate hardwoods at 32 percent. With the Korean won’ stability, Korean mills recognize domestic roundwood is becoming less competitive with imported products. During the 1998-1999 financial crisis, domestic roundwood harvest increased rapidly as its competitiveness with imported products grew due to the won’s devaluation. For CY 2001, the outlook for domestic roundwood production is 1.6 million CUM, with softwoods (70 percent) and temperate hardwoods (30 percent) maintaining the dominant species harvested. Domestic roundwood is used primarily for production of chopsticks, crates, wood matches, pitprop, and wood chips for pulp, lumber and board. With proper management, Korea projects that sustainable domestic production could satisfy more than 50 percent of total demand by the 2030s.

Solid Wood Products Situation/Outlook

With the country’s continued economic recovery, the wood processing industry is experiencing strong demand by the construction sector for lumber and plywood, and by the automobile, electronic, furniture and musical instrument industries for fiberboard and particle board. Based on the first four months of 2000 the plywood/board industry is operating at 90 percent of capacity. Data on the operating capacity of the whole lumber industry is not available. For CY 2001, the outlook for wood processing industry is expected to continue to grow in accordance with economic growth.

Trade

Overview/Outlook

During the first trimester CY 2000, wood products import grew to US$529 million, up 27 percent over the same period in 1999. The United States exports remain unchanged overall as Korea’s increased imports of logs, veneer and plywood has been offset by decreased imports of lumber, particle board, fiberboard and door/windows.

In CY 1999, total wood products import increased 54 percent on the strength of expansion in the construction and furniture sectors. U.S. wood product exports to Korea increased 50 percent.

During the first trimester CY 2000, Korea's import of U.S. hardwood products remained unchanged year-over-year, as the increased trade in logs, chips and veneer has been offset by the decreased imports of other hardwood products resulting from rising inventories in the housing construction industry.

During this same four month period, Korea's imports of prepackaged homes increased 70 percent year-over-year, with sharp increases in orders reported from the United States and Canada.

In 1999, Korea's support of the Asian-Pacific Economic Council's (APEC) initiated early voluntary sectorial liberalization (EVSL) negotiations on forestry products cooled when other countries, notably Japan, shifted positions in advance of the new WTO round of trade negotiations. Efforts in CY 2000 to revive this initiative within the APEC venue are underway, though local processors remain vocal against Korea's early liberalization of this sector.

Over the next 3-5 years, trade volume is expected to continue to grow in tandem with the expanding economy. Significant expansion in this market is not foreseen over the intermediate period unless tariffs are effectively reduced. The APEC and new WTO round still provide solid venues to accomplish the objective of reducing restrictive tariffs.

Competition

The limited local resources of wood products make Korea heavily rely on imported wood products from the ten major countries. The U. S. market share based on value in 1999 dropped to 13 percent after losing roundwood and wood chip markets to New Zealand, Chile and China.

The U.S. industry continues to face strong competition, particularly from New Zealand, Chile and China, as Korea still buys products based on price, not quality and durability.

Wood product exporting countries - New Zealand, Canada, Australia and the Scandinavian countries - actively participate in the Kyoung Hyang Housing Fair and Seoul living Design Fair as annual events in Korea. Their promotional exhibition extends to wood samples and technical publications.

The primary competition for U.S. softwood logs are tropical hardwood logs from Malaysia and Papua New Guinea, specifically the radiata pine from New Zealand and Chile. Russian softwood is also entering the market, mainly through barter deals with Korean trading companies.

In the lumber sector, the primary competition comes from Canada and New Zealand. The New Zealand Timber Industry Federation Inc. is actively promoting its radiata pine lumber. As the Korean market for wood frame houses is moving up, the EU, Finland, Canada and New Zealand are aggressively challenging the United States in this market. Canadian Forestry Industry Association constructed several demonstration 2X4 houses in Taejon area to promote softwood lumber exports and is planning to open a branch office in 2000. The Canadian Housing Mortgage Corporation is under agreement with the Korea Housing Institute to transfer technology and to develop 2X4 housing new golf courses and on greenbelt areas. The Canadian industry reportedly agreed to invest US$ 100 million for housing development.

Market Development Strategies

During 1999 and 2000 several significant regulatory changes occurred that necessitate closer review by U.S. companies to determine the extent of market opportunities for U.S. wood products.

First, as reported last year, deregulation of apartment selling prices in 1999 is leading to greater demand for hardwood products by developers who are increasingly using wood based flooring to attract consumers. Their use of high quality, wood flooring is generating demand for hardwood interior accessories, such as kitchen cabinet, door, window and interior trimmings. An expanding market of wood based flooring in the high-rise residential apartments is creating new opportunities for American hardwood veneer. Oak, maple and beech, which have been mainly imported from European countries, are the major species for laminating plywood or MDF.

Second, zoning restrictions were removed allowing construction on land previously zoned for golf courses and for green-belt preservation. Green belts are undeveloped land along river systems - similar to urban flood zones in the U.S.

Third, and most important according to the American Forest and Paper Association/Seoul office (AFPA/Seoul), are proposed revisions to Korea’s building code that would allow for broader application of wood frame construction in multi-unit buildings.

The overall size of the domestic market is expected to expand with the country’s economic recovery. Government deregulation on construction sector will encourage local wood related industries to meet higher demand of structural material, furniture and interior.

MARKET SEGMENT ANALYSIS

Construction Sector

Korea’s rebound from its 1998 economic crisis has been remarkable. GDP growth is projected at 8.5 percent in 2000, after reaching 10.7 percent in 1999. The Ministry of Construction and Transportation (MOCT) has set the CY 2000 goal for new housing starts at 450,000 units. New housing starts in CY 1999 totaled 404,715 units, up 32 percent from 1998, but well below pre-crisis levels.

Building permits in CY 1999 also rose sharply, up 42 percent over 1998. Both housing starts and building permits increased dramatically in the final quarter 1999, providing in early 2000 a strong basis for continued recovery in the construction sector.

Remodeling of houses is more popular now as it is becoming recognized for improving rentability of houses. The government does not release official statistics on the remodeling market.

Between early 1999 and April 2000, the government’s housing support program helped to reduce the number of unsold new high-rise apartments from 110,000 units to 62,000 units.

The current housing supply ratio is 92 percent nationwide. However, only 70 percent of families living in the Seoul metropolitan area own their home. The Korean government’s stated goal is to attain 100 percent housing supply and self-sufficiency in the housing market by CY 2002. While pursuit of this goal was set back by the economic crisis, it is evident that the government now is actively pursuing this housing objective again in earnest.

Construction of wood frame houses continues to increase, reflecting growing awareness of this type of housing. In CY 1999, two-by-four construction accounted for over 80 percent of the annual total. In CY 1999, total imported prepackaged houses declined 10 percent overall though units originating from the U.S. increased 27 percent. The outlook for two-by-four construction is encouraging as deregulation initiatives and building code revisions are favorable for single family and low rise multi-family unit facilities.

The MOCT recently announced a comprehensive plan aimed at providing balance between development and the environment. The plan mainly accomplishes this objective by addressing the concept of quasi-farmland that is subject to development at the discretion of local administrators.

If the plan is fully implemented, most of the existing quasi-farmland will shift to either development, or greenbelt zone classifications. Land developers are raising concern about the plans impact on land supply for construction.

Korea is a market with high potential for wood products considering current development projects for wood frame housing units, the application of wood products in hybrid buildings and low-rise commercial buildings, a new airport to be constructed at Young-Jong-Do, and other construction using structural lumber and panel products, including gluram such as church buildings, training centers, restaurants, resort development and sports center.

Marketing

The housing and construction sectors' recovery have been major factors contributing to Korea's economic growth. Building permits and housing starts have continued to increase steadily throughout CY2000. Further, proposed revisions to regulatory standards should help support continued growth in this sector.

The nature of the Korean housing market has not changed dramatically with multi-story, multi-family housing units still representing almost 90 percent of all new housing starts. However, the government is discussing alternative housing policies which may change the character of the current Korean housing market. One policy change attracting considerable attention is to encourage more development of low-rise garden style multi-family units for quality of life reasons. The discussion has identified increasing the portion of new housing construction of low-rise multi-family units from the current 10 percent to 50 percent over an unspecified period. Such a policy shift, if enacted, would increase the size potential of the market for U. S. structural wood products.

The MOCT proposed building code design standards revisions, expected to be enacted by mid-2000, are based on the U.S.' "Uniform Building Code" (UBC) and AFPA's "National Design Specification." The revised standard would allow for multi-family construction of up to three stories be wood frame construction. However, fire code regulations still must be modified before any revision to the building code standards could become applicable.

The government's lifting of restrictions for new construction in golf course and greenbelt areas has enhanced demand for wood frame construction as evidenced by the many Korean builders and architects seeking technical assistance and advice from U. S. wood frame construction companies.

AF&PA Seoul office has actively participated in housing exhibitions to promote wood frame housing construction: Kyung-Hyang Housing Fair in Seoul (February), in Pusan (September) and in Chonju (October); Country Home Developers and Builders Trade Fair (September; Housing Expo (early December). Since 1996, the AF&PA has organized an annual two-week training program for Korean carpenters in an attempt to improve Korean carpenters' skill and knowledge on wood house construction.

Policy

Since May 1998, when Korea's housing market was fully liberalized, 15 foreign developers have become active in Korea. Korea Land Corp. (KLC) is funding development projects including residential housing communities targeting international customers. Sites for these communities, Yongin, Paju and Kyonggi Province locations, would allow for convenient commuting into Seoul. A majority of housing in these communities will be of single family and low rise multi-family units.

The Korean building code restricts building height and total allowable floor area. Revision of the building code, a priority in the wood construction industry, is expected to be enacted by mid-2000. The proposed revision would allow wood frame constructed multi-unit buildings of up to three stories.

The Korean fire code, however, places height restrictions on wood frame units for safety reasons. This needs to be addressed before the building code revision on structure height can become applicable. Towards this effort, in April 2000, the Fire Insurers Laboratory of Korea (FILK) conducted a burn tests on major structural parts of wood frame house and on locally produced gluelam. The Korea Forestry Research Institute, a government agency, requested the test as part of its promotional program for wood frame construction. Tested were floor, wall and roof systems sheathed with U. S. gypsum board. However, wood frame construction is still prohibited in multi-story, multi-family application because the government does not recognize gypsum board as non-combustible material.

Korea maintains restrictions on size (square footage) of housing units for resource conservation reasons. Proposed revised building code standards would remove the requirement for building permits for construction of single detached houses smaller than 100 pyong (equivalent to 3,600 square feet). Building permit exemptions are currently in place for single family houses of less than 30 pyong (equivalent to 1,080 square feet).

Korea's policies controlling mortgage financing are changing too. Starting in June 2000, the Korea Mortgage Corp. (KoMoCo), a government affiliated agency developed to provide low income housing loans, raised the maximum allowable mortgage loan from 20 percent up to 70 percent. Prior to this home owners had to rely mostly on family and friends for funds and personal loan cross-guarantees to finance purchase of their units. Currently, home mortgage interest rates are in the 7.75 - 9 percent range. To compete, the government established KoMoCo to issue collateral securities on mortgages. The government plans to inject 17 trillion won (equivalent to US$ 15 billion) into the National Housing Fund in CY 2000 for housing construction. In CY 1999, 13 trillion won (equivalent to US$ 11 billion) was budgeted for this purpose.

In CY 2000, the Korean government plans to invest 14.08 trillion Korean won (equivalent to US$ 12.46 billion) into infrastructure projects. In 1999, 12.2 trillion Korean won (equivalent to US$10.2 billion) was budgeted towards such projects. Large government infrastructure projects have regained priority funding as the economy and budget situation stabilized. Major projects include: an International Airport in Inchon composed of 10 projects including catering facilities and ground support equipment & deicing facilities; a Seoul-Pusan high-speed railway line; a new container terminal near the port city of Pusan; and two new harbor expansion works aimed at making Korea an international shipping hub.

Trade

Korea's economic recovery is driving the 15 percent growth in residential and commercial construction recorded for the first trimester in CY 2000. January-April 2000 data show year-over-year imports up 27 percent for forest products, and 70 percent for prepackaged houses, with sharp increases in trade from the United States and Canada.

Furniture & Interiors Sector

Overview

The Korea furniture and interior markets continue to grow in tandem with the country's economic recovery.

New furniture construction orders show an April 2000 year-over-year increase. The Korea Federation of Furniture Industry Cooperatives (KFFIC) has increased its CY 2000 furniture production projection to 7 percent in response to the current level of expansion in the construction and renovation /remodeling sectors. Furniture and interior wood material demand would include: both hardwood and softwood for furniture, door/windows, kitchen cabinets, flooring, wall panels etc.

The Interior Contractors Committee (ICC) forecasts the CY 2000 Korean interior market would exceed the CY 1999 market estimated at two trillion Korean won (equivalent to US$ 1,700 million). The ICC projection is based on the industry expanding in tandem with the country's economic recovery in CY 2000 and CY 2001. Spurring growth in the interior market is the construction boom in luxury apartments and the new Inchon International Airport. Note: No official data exists for the interior market.

Marketing

Consumer furniture preference is clearly delineated by age bracket. Buying patterns of younger couples focus on modern fashion incorporating the image of simplicity. They are major buyers of living room furniture, modern style sofas, dinner tables and decorative multi-use closets. Buying patterns of middle aged consumers favor more classic style natural wood furniture. Their preference for traditional stand-alone style furniture is slowly being replaced for built-in style natural wood furniture. This mostly relates to kitchen tables and closets. Local manufacturers prefer to use U.S. cherry, maple and oak as their major raw materials.

With builders now able to recoup upgrade investments as a result of deregulation on apartment selling prices, the demand for wood flooring has rebounded strongly. In 1999, the wood flooring market totaled 500 billion Korean won (equivalent to US$450 million) for 1.5 million square meters. By 2001, the forecast is for the market to double in size, to 1 trillion Korean won (equivalent to US$910 billion). The most popular wood species used in flooring are: oak, maple, cherry and beech. The standard thickness of the veneer is 0.5 mm.

A number of buildings in the Seoul metropolitan area, left vacant as a result of mergers and bankruptcies during the economic crisis, are slated for conversion to high-end residential housing units, principally for foreigners. Demand is arising for good quality interior wood product accessories. Traditionally, American hardwoods have been preferred for interior decoration. Strong demand for U.S. hardwood products today is due to increased demand for veneer for the traditional Korean floor heating system (Ondol). U.S. hardwood are competitive with tropical hardwoods due to high market prices for Southeast Asian hardwoods.

Market competition and price differentials are key impediments to expanding U.S. exports to Korea. Though changing gradually, Korea remains a price-sensitive market within the wood furniture sector. Paneled products, such as plywood, particle board, and MDF--sectors where the United States is not price competitive with most imports from Southeast Asia--command the market.

For the promotion of hardwood, AF&PA Seoul continues holding Living Design Fair to improve familiarity among local design students, who will lead the fashion of Korean furniture and interior.

Policy

The Ministry of Environment is supporting a new bill requiring mandatory use of built-in furniture at newly constructed high rise residential apartments. The bill's intent is to reduce furniture waste that results during frequent moves by Korean households. The furniture industry is split on the bill, with large manufacturers in support and medium /smaller ones against. Large furniture manufacturers dominate the high rise residential apartment market. Built-in furniture is primarily made with veneer on panel products such as plywood, MDF and particle board.

Trade

As personal incomes continue to rise and living standards improve, demand of finished furniture and raw materials for domestic construction continue to increase. The trade trend supports expansion of the domestic furniture manufacturing industry to meet consumer furniture requirements. Furniture industry estimates furniture production to grow 7 percent in CY 2000 and 10 percent in CY2001, respectively.

Though available since CY1998, the Korean furniture manufacturers have not actively pursued financing raw material imports through the GSM-102 program.

Material Handling Industry

The health of the material handling industry is closely related to that of the import/export trade. During the country's 1998-1999 economic crisis, the wood pallet market hoovered around the 50 million unit mark. The Korea Pallet Association (KPA)forecasts pallet production would increase in CY 2000 to meet higher demand resulting from expanding trade by the country. Domestic producers of plastic pallets report increased output as companies look to reduce replacement costs and minimize damage caused by nails in wood pallets. Further, spurring on demand for plastic pallets are requests from Australian and French importers for Korean exporters use plastic pallets to eliminate potential quarantine problems. KPA, however, anticipates rising crude oil prices will dampen demand for plastic pallets.

SECTION III. STATISTICAL TABLES

Strategic Indicator Tables

STRATEGIC INDICATOR TABLE: FOREST AREA

STRATEGIC INDICATOR TABLE: FOREST AREA (million hectares/million cum)			
Country: Korea, Republic of	Previous	Current	Following
Report Year: 2000	Calendar Year	Calendar Year	Calendar Year
Total Land Area	9.94	9.94	9.94
Total Forest Area	6.436	6.431	6.425
--of which, Commercial	4.985	4.994	5
----of commercial, tropical hardwood	0	0	0
----of commercial, temperate hardwood	1.296	1.298	1.3
----of commercial, softwood	2.293	2.147	2.15
--of forest area, non-commercial	1.451	1.441	1.431
Forest Type			
--Of which, virgin	4.1	4.1	4.1
--Of which, plantation	2.3	2.3	2.3
--Of which, other commercial (regrowth)	0.5	0.5	0.5
Forest Ownership			
--Nationally owned and no commercial access	0.33	0.33	0.33
--Nationally owned, commercial logging permitted	1.09	1.09	1.09
--Other publicly owned land, no commercial access	0.1	0.1	0.1
--Other publicly owned, logging permitted	0.38	0.38	0.38
--privately owned commercial forest	3.5	3.5	3.6
Total Volume of Standing Timber	363.6	385.4	408.5
--Of which, Commercial Timber	281.5	293.4	316.3
Annual Timber Removal	1.7	1.6	1.6
Annual Timber Growth Rate	6	6	6
Annual Allowable Cut	1.7	1.6	1.6

Source: Korea Forestry Administration

STRATEGIC INDICATOR TABLE: CONSTRUCTION MARKET

STRATEGIC INDICATOR TABLE: CONSTRUCTION MARKET			
Country:Korea, Republic of	Previous	Current	Following
Report Year:2000	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	404,715	450,000	500,000
--Of which, wood frame	1,265	1,500	2,000
--Of which, steel, masonry, other materials	403,450	448,500	498,000
--Of total starts, residential	404,715	450,000	500,000
----Of residential, single family	33,772	36,000	40,000
----Of residential, multi-family	370,943	414,000	460,000
--Of total starts, commercial	404,715	450,000	500,000
Total Value of Commercial Construction Market ($US million)	30,502	35,000	40,000
Total Value of Repair and Remodeling Market ($US million)	na	na	na
Are tariffs on softwood from the United States higher, equal or lower than softwood imported from other countries? 1/	equal	equal	equal
Are tariffs on plywood from the United States higher, equal or lower than plywood imported from other countries? 1/	equal	equal	equal
Are non-tariff barriers on softwood from the United States higher, equal or lower than softwood imported from other countries? 1/	equal	equal	equal
Are non-tariff barriers on plywood from the United States higher, equal or lower than plywood imported from other countries? 1/	equal	equal	equal
Are there market development programs for construction, softwood or plywood imports funded by foreign governments?	no	no	no
If yes, identify the following:			
--Country(ies)			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/	na	na	na
--Estimated annual market expansion outlay ($US million) by country	na	na	na

Is the acceptability of U.S. style timber frame construction (i.e., per building codes, mortgage availabity, etc.) high, medium or low? 3/	low	low	low
Are consumer preferences for solid wood materials vis-a-vis non-wood materials in construction high, medium or low? 3/	high	high	high
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 3/	medium	medium	medium
If price quotes for construction and structural wood products are available, identify the leading source(s)	Traders, Forestry Administration		
1/ If other than equal, explain in report text.			
2/ If "other", then explain in report text.			
3/ If low or medium, explain in report text.			

Source: Post’s Estimate, Ministry of Construction and Transportation (MOCT)

STRATEGIC INDICATORS TABLE: FURNITURE & INTERIORS MARKET

STRATEGIC INDICATORS TABLE: FURNITURE & INTERIORS MARKET			
Country: Korea, Republic of	Previous	Current	Following
Report Year:2000	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	404,715	450,000	500,000
Total Number of Households)	14,158	14,458	14,758
Furniture Production ($US million)	2,700	2,900	3,200
Interiors Market Size ($US million)	1,700	1,900	2,200
Total Furniture Imports ($US million)	210	230	250
Total Furniture Exports ($US million)	235	235	235
Are tariffs on hardwood from the United States higher, equal or lower than hardwood imported from other countries? 1/	equal	equal	equal
Are non-tariff barriers on hardwood from the United States higher, equal or lower than hardwood imported from other countries? 1/	equal	equal	equal
Are there market development programs for furniture or interiors market expansion funded by foreign governments?	none	none	none
If yes, identify the following:	na	na	na
--Country(ies) 2/	na	na	na
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 3/	na	na	na
--Estimated annual market expansion outlay ($US million) by country	na	na	na
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 4/	high	high	high
If price quotes for furniture and interiors products are available, identify the leading source(s)	na	na	na
1/ If other than equal, explain in text.			
2/ If more than one country, report each country individually.			
3/ If "other", explain form of subsidy in text.			

4/ If low or medium, explain in test.			

Source: Agricultural Affairs

STRATEGIC INDICATOR TABLE: MATERIAL HANDLING MARKET

STRATEGIC INDICATOR TABLE: MATERIAL HANDLING MARKET			
Country: Korea, Republic of	Previous	Current	Following
Report Year:2000	Calendar Year	Calendar Year	Calendar Year
Total Value of Industrial Output ($US million)	420	435	455
New Pallet Production (million units)	8	10	13
Are consumer preferences for solid wood pallets and packaging materials vis-a-vis non-wood materials high, medium or low? 1/	high	high	high
Are industry/trade preferences for repaired/recycled pallets over new pallets low, medium or high? 1/	high	high	high
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 1/	na	na	na
Identify leading source(s) of price quotes:	producers	producers	producers
Are there market development programs for the materials handling market expansion funded by foreign governments?	no	no	no
If yes, identify the following:	na	na	na
--Which Countries?	na	na	na
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/	na	na	na
--Estimated annual market expansion outlay ($US million) by country	na	na	na
1/ If low or medium, explain in text of report.			
2/ If "other", explain in text of report.			

Source: Agricultural Affairs

STRATEGIC INDICATOR TABLE: WOOD PRODUCTS SUBSIDIES

STRATEGIC INDICATOR TABLE: WOOD PRODUCTS SUBSIDIES			
Country: Korea, Republic of	Previous	Current	Following
Year of Report: 2000	Calendar Year	Calendar Year	Calendar Year
Total Solid Wood Export Subsidy Outlay ($US million)	none	none	none
Is there a ban on the export of logs, lumber, or veneer? If yes, which?	none	none	none
Are there export taxes (yes/no)? 1/	no	no	no
If yes, for which products? (Identify export tax level in tariff table)	na	na	na
Source(s) of Export Subsidy Information	na	na	na
Total Wood Production Subsidy Outlay ($US million)	na	na	na
Are there any programs favoring the development of commercial forestry? 1/	yes	yes	yes
If yes, Post best estimate of scope (thousands of hectares)	20	20	20
If yes, Post's best estimate of financial outlay ($US million)	100	100	100
Source(s) of Production Subsidy Information	na	na	na
Does the country support export expansion activities similar to the Cooperator Program?	no	no	no
--Which country markets are targeted?	na	na	na
--Which products are targeted?	na	na	na
Are there significant wood products export expansion activities at the provincial or regional level?	no	no	no
--If yes, identify key players	na	na	na
--If yes, identify key market segments	na	na	na
--If yes, identify key country markets	na	na	na
--If yes, identify key products	na	na	na
--Post's estimate for combined outlay ($US million)	na	na	na
Source(s) of Provincial/Regional Support Information	na	na	na
Are there other wood products export expansion activities? If yes, describe in report.	no	no	no

Source: Agricultural Affairs

STRATEGIC INDICATOR TABLE: FOREST PRODUCT TARIFFS AND TAXES

STRATEGIC INDICATOR TABLE: FOREST PRODUCT TARIFFS AND TAXES(PERCENT)						
		Tariff	Tariff	Other		
Country:Korea, Rep of	Product	Current	Following	Import	Total Cost	Export
Report Year:2000	Description	Year	Year	Taxes/ Fees	of Import	Tax
4401	Wood Chips, fuel wood 1/	2	2	12		na
4403	Tropical Roundwood 2/	1	1	12		na
4403	Other Roundwood 2/	2	2	12		na
4404	Sticks etc	5	5	12		na
4405	Wood wool	5	5	12		na
4406	Railway ties	5	5	12		na
4407	Lumber	5	5	12		na
4408	Veneer	5	5	12		na
4409	Fihished Lumber	8	8	12		na
4410	Particle board	8	8	12		na
4411	Fiberboard	8	8	12		na
4412	Plywood 3/	8	8	12		na
4413	Densified wood	8	8	12		na
4414	Wooden frames	8	8	12		na
4415	Packing cases	8	8	12		na
4416	Casks	8	8	12		na
4417	Tools	8	8	12		na
4418	Builders' joinery	8	8	12		na
4419	Tableware/Kitchenware	8	8	12		na
4420	Wood marquetry	8	8	12		na
4421	Other articles of wood	8	8	12		na
4422	na	na	na	12		na
4423	na	na	na	12		na
4424	na	na	na	12		na
4425	na	na	na	12		na
9406	Pre-fabricated Houses	8	8	12		na

1/ Quota tariff reduced to one percent for temperate hardwood chips (for pulp).
2/ Quota tariff reduced to zero percent for all imported logs.
3/ Quota tariff reduced to 2.5 percent for all imported veneer thicker than 0.5 mm.
4/ Adjusted tariff increased to 14 percent for thicker than 6 mm.
Source: Korea Customs Service (KCS), Agricultural Affairs.

PS&D Tables and Trade Matrices

Temperate Hardwood Logs PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Temperate Hardwood Logs				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	348	542	0	450	0	450
Imports	208	231	0	250	0	280
TOTAL SUPPLY	556	773	0	700	0	730
Exports	0	0	0	0	0	0
Domestic Consumption	556	773	0	700	0	730
TOTAL DISTRIBUTION	556	773	0	700	0	730

Import Trade Matrix- Temperate Hardwood Logs

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Temperate Hardwood Logs		
Time period	JAN/DEC	Units:	1,000 CUM
Imports for:	1998		1999
U.S.	20	U.S.	24
Others		Others	
Russia	26	Russia	17
Malaysia	20	Malaysia	41
PNG	89	PNG	118
China	9	China	8
Total for Others	144		184
Others not Listed	5		23
Grand Total	169		231

Korea Customs Service(KCS)

Tropical Hardwood Logs PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Tropical Hardwood Logs				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	0	0	0	0	0	0
Imports	812	878	0	1000	0	1200
TOTAL SUPPLY	812	878	0	1000	0	1200
Exports	0	0	0	0	0	0
Domestic Consumption	812	878	0	1000	0	1200
TOTAL DISTRIBUTION	812	878	0	1000	0	1200

Import Trade Matrix- Tropical Hardwood Logs

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Tropical Hardwood Logs		
Time period	JAN/DEC	Units:	1000CUM
Imports for:	1998		1999
U.S.	1	U.S.	7
Others		Others	
Malaysia	206	Malaysia	310
PNG	202	PNG	262
Solomon Is.	82	Solomon Is.	90
New Zealand	143	New Zealand	140
Russia	15	Russia	34
Total for Others	648		836
Others not Listed	18		35
Grand Total	667		878

Softwood Logs PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Softwood Logs				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	1010	1152	0	1100	0	1100
Imports	4640	5461	0	6000	0	6500
TOTAL SUPPLY	5650	6613	0	7100	0	7600
Exports	5650	6613	0	7100	0	7600
Domestic Consumption	0	0	0	0	0	0
TOTAL DISTRIBUTION	5650	6613	0	7100	0	7600

Import Trade Matrix- Softwood Logs

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Softwood Logs		
Time period	JAN/DEC	Units:	1,000 CUM
Imports for:	1998		1999
U.S.	287	U.S.	326
Others		Others	
New Zealand	2098	New Zealand	3216
Russia	749	Russia	1144
Australia	248	Australia	381
Chile	293	Chile	356
Total for Others	3388		5097
Others not Listed	52		38
Grand Total	3727		5461

Temperate Hardwood Lumber PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Temperate Hardwood Lumber				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	50	67	0	73	0	82
Imports	200	231	0	260	0	290
TOTAL SUPPLY	250	298	0	333	0	372
Exports	0	1	0	1	0	1
Domestic Consumption	250	297	0	332	0	371
TOTAL DISTRIBUTION	250	298	0	333	0	372

Import Trade Matrix- Temperate Hardwood Lumber

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Temperate Hardwood Lumber		
Time period	JAN/DEC	Units:	1000 CUM
Imports for:	1998		1999
U.S.	33	U.S.	65
Others		Others	
China	36	China	79
Canada	4	Canada	8
Malaysia	6	Malaysia	23
EU	2	EU	5
Indonesia	10	Indonesia	36
Total for Others	58		151
Others not Listed	9		15
Grand Total	100		231

Source: Korea Customs Service(KCS)

Korea: Hardwood Lumber Imports From U.S.

Korea: Hardwood Lumber Imports From U.S. (CUM and US$ Thousand)						
Species	1997		1998		1999	
	Volume	Value	Volume	Value	Volume	Value
Oak	84,467	36,995	14,212	8,716	24,545	14,610
Maple	49,966	23,392	12,943	8,517	21,000	14,992
Poplar	2,175	1,002	991	504	2,301	1,031
Basswood	926	580	697	512	1,794	1,057
Ash	2,443	1,946	916	630	3,727	2,033
Other	16,494	9,630	6,152	3,643	11,912	8,728
Total	156,471	73,545	35,911	22,522	65,279	42,451

Source: Korea Customs Service (KCS)

Tropical Hardwood Lumber PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Tropical Hardwood Lumber				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	250	244	0	219	0	292
Imports	250	321	0	370	0	400
TOTAL SUPPLY	500	565	0	589	0	692
Exports	0	0	0	0	0	0
Domestic Consumption	500	565	0	589	0	692
TOTAL DISTRIBUTION	500	565	0	589	0	692

Import Trade Matrix- Tropical Hardwood Lumber

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Tropical Hardwood Lumber		
Time period	JAN/DEC	Units:	1000CUM
Imports for:	1998		1999
U.S.	0	U.S.	0
Others		Others	
Malaysia	151	Malaysia	149
Indonesia	81	Indonesia	158
Total for Others	232		307
Others not Listed	9		14
Grand Total	241		321

Source: Korea Customs Service(KCS)

Softwood Lumber PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Softwood Lumber				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	3500	3857	0	4030	0	4322
Imports	250	245	0	280	0	320
TOTAL SUPPLY	3750	4102	0	4310	0	4642
Exports	10	7	0	10	0	15
Domestic Consumption	3740	4095	0	4300	0	4627
TOTAL DISTRIBUTION	3750	4102	0	4310	0	4642

Import Trade Matrix- Softwood Lumber

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Softwood Lumber		
Time period	JAN/DEC	Units:	1,000 CUM
Imports for:	1998		1999
U.S.	6	U.S.	13
Others		Others	
Canada	13	Canada	62
New Zealand	42	New Zealand	52
Chile	94	Chile	59
Indonesia	10	Indonesia	10
Brazil	12	Brazil	16
China	3	China	10
South Africa	3	South Africa	7
Total for Others	177		216
Others not Listed	11		16
Grand Total	194		245

Source: Korea Customs Service(KCS)

Korea: Softwood Lumber Imports From U.S.

Korea: Softwood Lumber Imports From U.S. (CUM and US$ Thousand)						
Species	1997		1998		1999	
	Volume	Value	Volume	Value	Volume	Value
Cedar	241	134	82	39	232	92
Douglas Fir	1,048	461	27	10	1,453	361
Whitewood or Fir	5,331	3,482	1,066	547	996	460
Spruce	8,884	11,011	3,721	4,682	9,409	5,696
Other	3,307	5,691	1,424	2,777	1,424	2,777
Total	18,811	20,779	6,320	8,055	13,216	7,975

Source: Korea Customs Service (KCS)

Veneer PSD

PSD Table						
Country	Korea, Republic of					
Commodity	Hardwood Veneer				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	0	0	0	0	0	0
Imports	550	121	0	220	0	325
TOTAL SUPPLY	550	121	0	220	0	325
Exports	0	0	0	0	0	0
Domestic Consumption	550	121	0	220	0	325
TOTAL DISTRIBUTION	550	121	0	220	0	325

Note: Included softwood veneer in import data.

Import Trade Matrix- Veneer

Import Trade Matrix			
Country	Korea, Republic of		
Commodity	Hardwood Veneer		
Time period	JAN/DEC	Units:	1000 CUM
Imports for:	1998		1999
U.S.	5	U.S.	5
Others		Others	
Malaysia	56	Malaysia	87
Brazil	13	Brazil	10
Chile	18	Chile	9
China	5	China	4
Indonesia	1	Indonesia	1
Total for Others	93		111
Others not Listed	3		5
Grand Total	101		121

Note: Included softwood veneer.
Source: Korea Customs Service(KCS)

Other Tables

Korea: Supply of Domestic Timber

Korea: Supply of Domestic Timber (1,000 CUM)				
Year	Pit props	Pulp	Lumber/Board	Total
1995	139	405	512	1,055
1996	109	392	694	1,195
1997	104	367	591	1,062
1998	110	406	912	1,428
1999	117	410	1,167	1,694
2000 1/	100	396	1,054	1,550

1/ Projection
Source: Korea Forestry Administration

Korea: Wood Products Production (1,000 CUM)

Korea: Wood Products Production (1,000 CUM)			
Items	1997	1998	1999
Softwood Lumber	4,460	2,680	3,857
Tropical Hardwood Lumber	364	177	244
Temperate Hardwood Lumber	68	49	67
Sub Total, Lumber	4,892	2,906	4,168
Plywood	1,014	641	734
Fiberboard	750	583	844
Particle board	720	507	672
Grand Total	7,376	4,637	6,418

Source: Agricultural Affairs, Korea Plywood Industry Association (KPIA)

Korea: Value of Domestic Construction Orders Comparison for 1998 and 1999

Korea: Value of Domestic Construction Orders Comparison for 1998 and 1999 (Billion Korean Won, By the Type of Construction)			
Sector	1998	1999	Changes(%)
Building, subtotal	16,804	22,455	34
-Dwelling	10,902	17,402	60
-Office & Stores	2,362	1,648	-30
-Factory & Storage	491	716	46
-Public Office 1/	1,559	1,253	-20
-Others	1,490	1,436	-4
Civil Engineering, subtotal	19,100	13,650	-29
-Forestry Conservancy & Water Control	70	78	11
-Agriculture & Fisheries	554	268	-52
-Roads & Bridge	10,569	5,058	-52
-Harbors& Airports	620	1,182	91
-Railways & Track	2,119	2,002	-6
-Water Supply & Sewage	1,326	1,462	10
-Generation of Electricity 2/	1,343	631	-53
-Land Development 3/	1,244	737	-41
-Dams	86	57	-34
-Installation of Machinery	868	1,951	125
-Others	299	224	-25
Other Construction, subtotal	132	192	45
Grand Total	36,036	36,297	1

1/ Including schools and hospitals
2/ Including transmission, transformation and distribution
3/ Including gardens and grounds
Source: National Statistical Office (NSA)

Korea: Building Construction Permits by Structure

Korea: Building Construction Permits by Structure (Floor area, Thousand Square meters)					
Year	Total	Ferro-Concrete	Brick & Stone	Wooden	Others
1995	117,327	103,134	9,086	89	5,022
1996	113,820	101,940	7,193	131	4,557
1997	113,374	104,214	5,105	173	3,881
1998	50,965	46,701	1,889	113	2,263
1999	72,534	66,192	2,340	142	3,858

Source: Ministry of Construction and Transportation (MOCT)

Korea: Building Construction Permits by Use

Korea: Building Construction Permits by Use (Floor area, Thousand Square meters)						
Year	Total	Dwelling	Commercial	Factory	Educational &Social	Other
1995	117,327	62,614	28,549	13,727	6,281	6,157
1996	113,820	61,062	26,862	11,921	6,289	7,682
1997	113,374	62,677	27,918	8,796	6,603	7,379
1998	50,965	31,156	8,753	2,796	3,983	4,279
1999	72,534	44,606	11,746	7,824	4,478	3,882

Source: Ministry of Construction and Transportation (MOCT)

Korea: Housing Starts per Type (1,000 units)

Korea: Housing Starts per Type ('000 units)					
Year	Total	Apartment	Single Family	Tenement	Rowhouse
1996	592,132	462,548	61,263	18,210	5,011
1997	596,435	484,949	52,948	19,219	39,319
1998	306,031	262,879	23,773	7,363	12,016
1999	404,715	345,345	33,772	7,640	17,958
2000 1/	450,000	-	-	-	-

1/ Projection
Source: Ministry of Construction and Transportation

Korea: Import of Wood Frame Housing Per Country

Korea: Import of Wood Frame Housing Per Country (Unit: 1,000 US$ on a CIF basis)					
Country	1996	1997	1998	1999	2000 (1-4)
United States	14,400	17,152	2,754	3,501	1,401
Canada	5,305	8,627	2,357	934	342
Finland	1,148	1,424	878	651	217
Sweden	44	98	19	0	0
New Zealand	121	345	0	302	0
Australia	443	515	176	0	0
Russia	218	189	17	61	65
EU	478	473	37	101	27
Others	503	370	14	60	74
Total	22,660	29,193	6,252	5,610	2,126

Source: Korea Customs Service

Korea: Production of Wood-Based Products

Korea: Production of Wood-Based Products
(1,000 pieces)

Year	Vehicle 1/	Furniture 2/	Sinkboard	Musical Instrument	
				Pianos	Guitars 3/
1995	624	1,303	3,013	212	1,500
1996	625	1,213	2,808	166	1,400
1997	563	1,162	2,718	134	1,300
1998	438	NA	2,327	92	1,150
1999	731	NA	2,741	95	1,800

1/ Bus, truck, and shipping container
2/ Freestanding wood-based furniture
3/ KMIIA's estimated data because official statistics do not include the number of guitar products made by small-medium sized companies.
Source: National Statistical Office (NSO) and Korea Musical Instrument Industry Association (KMIIA)

Korea: Value of Total Forest Product Imports

Korea:Value of Total Forest Product Imports (US$ Million on a CIF)						
Description (H.S. No.)	From the World			From the United States		
	1998	1999	%	1998	1999	%
Chips (4401)	51	91	79	11	24	124
Logs (4403)	349	521	49	49	71	43
Lumber (4407)	166	261	58	31	51	69
Veneer (4408)	43	52	-22	8	11	35
Finished Lumber (4409)	36	28	-22	1	2	22
Particle Board (4410)	25	55	118	2	2	-5
Fiberboard (4411)	10	42	304	4	4	-3
Plywood (4412)	154	260	69	2	2	-8
Door and Windows (4418)	34	32	-5	8	8	0
Other Articles of Wood	43	62	43	2	2	35
Total	912	1,404	54	118	177	50

Source: Korea Customs Service(KCS)

Korea: Value Comparison of Forest Product Import for January-April

Korea: Value Comparison of Forest Product Import for January-April (US$ Million on a CIF)						
Description (H.S. No.)	From the World			From the United States		
	1999	2000	%	1999	2000	%
Chips (4401)	28	27	-4	3	6	100
Logs (4403)	158	190	20	22	24	9
Lumber (4407)	76	88	16	16	15	-6
Veneer (4408)	14	23	64	3	4	33
Finished Lumber (4409)	7	10	43	0.4	0.4	0
Particle Board (4410)	18	24	33	2	0.3	-85
Fiberboard (4411)	11	28	155	3	0.5	-83
Plywood (4412)	76	96	26	0.6	0.9	50
Door and Windows (4418)	10	7	-30	3	0.8	-73
Other Articles of Wood	17	26	53	0.6	1.1	83
Total	415	529	27	53	53	0

Source: Korea Customs Service(KCS)

Korea: Volume of Forest Product Imports

Korea: Volume of Forest Product Imports (1,000CUM)						
Description (H.S. No.)	From the World			From the United States		
	1997	1998	1999	1997	1998	1999
Chips (4401) 1/	753	573	1,180	139	108	312
Logs (4403)	8,266	4,563	6,570	749	308	356
Lumber (4407)	1,003	535	827	176	42	79
Veneer (4408)	407	101	121	6	5	5
Finished Lumber (4409) 1/	95	36	29	2	0.6	0.7
Particle Board (4410)	253	149	377	41	8	10
Fiberboard (4411)	74	36	217	14	6	17
Plywood (4412)	949	494	791	4	2	3
Door and Windows (4418) 1/	69	29	26	13	5	5

1/ Metric Tons
Source: Korea Customs Service (KCS)
Agricultural Affairs readjusted the number of logs and lumber based on the KCS' statistics.