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Forest Products

Forest Products Annual Report

1998

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Report Highlights: In 1997 Japan's housing starts, a market utilizing about 70% of imported wood products, dropped to 1.387 million units, a 15.7% fall from the previous year. In turn, Japan's imports of softwood logs and softwood lumber also dropped significantly. During 1998, total wood imports will, at best, reach 1997's level, with U.S. competitiveness limited by the weak yen against the U.S. dollar. Industry sources expect housing starts in 1999 to improve due to the government's stimulus package improving consumer confidence. Despite the gloomy economic situation, on the policy front, positive developments occurred during 1997 and 1998 which will improve market opportunities for imported wood products. The Ministry of Construction (MOC) lifted a ban on the construction of wood-framed, 3-story, multi-family residential units in Japanese quasi-fire protection districts. In June 1998 Japan passed a law stipulating a change from Japanese building codes and standards to a set of performance-based standards. The MOC recognized U.S. grademarks for machine stress-rated lumber in February 1998 and for finger-jointed lumber in June 1998.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
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Executive Summary

Japanese housing starts in 1997, a sector of the construction market utilizing 70% of available wood products, fell to 1.387 million units, a 15.7% drop from the 1.643 million units of 1996. The impact of a 3% sales tax hike in effect after April 1997, the economic recession, a series of the government-driven deregulation programs affecting financial, business, and corporate institutions, reports of government's restructuring programs, and national indebtedness are factors contributing to consumer and home buying insecurity. During 1998, the industry forecasts housing starts will remain depressed because the above factors will continue. Through May 1998, year-to-date housing starts were 492,000, down 15% from the same term last year. The housing start forecast for the entire year ranges between 1.270 million and 1.330 million units. On hopes that a positive impact of the government's economic stimulus package may begin to be felt toward year-end, 1999 housing start performance is expected to be better than 1998.

As a result of lackluster housing market demand, during 1997 Japan's imports of softwood logs and softwood lumber dropped about 5% and hardwood lumber dropped 30% from 1996. During 1998, as a result of the protracted economic recession, Japan's imports of forest products during January to April 1998 totaled only $3.3 billion, down 44% from the same period last year. Wood imports in 1998 are expected, at best, to just reach the 1997 level for most products. According to trade sources, Japan's 1998 imports from North America are expected to drop to about 4,400,000 m3, down 22% from 1997, the lowest level in nearly 30 years. The weakened yen against the U.S. dollar will continue to favor suppliers such as Russia and countries in S.E. Asia.

Despite the gloomy economic situation, on the policy front, positive developments occurred during 1997 and 1998. The Ministry of Construction (MOC) lifted a ban on the construction of wood-framed, 3-story, multi-family residential units in Japanese quasi-fire protection districts (i.e. densely populated urban areas) where the high-rise wood-framing of apartments was previously prohibited as a fire-hazard. While a prior approval of the construction plan is required, subject to a separate appraisal process, the lifting of this ban was applauded by the wood industry as a new marketing opportunity. Second, in June 1998 a bill was passed stipulating a transition of the traditionally prescriptive Japanese building codes and standards to a set of performance-based standards. This historic revision in the building codes is expected to improve market opportunities for wood products, particularly for engineered wood products. A series of new product testing and performance-based appraisal requirements and procedures are to be finalized through 1999 and implemented in 2000. Third, the MOC recognized U.S. grademarks for machine stress-rated lumber in February 1998 and for finger-jointed lumber in June 1998, thus improving access and competitiveness of imported U.S. wood products.

Strategic Indicator Tables

STRATEGIC INDICATOR TABLE 1: FOREST AREA (million hectares/million cum)			
Country: Japan Report Year: 1998	Previous Calendar Year	Current Calendar Year	Following Calendar Year
Total Land Area (mill. Ha.)	37	37	37
Total Forest Area (mill. Ha.)	25	25	25
--of which, Commercial (mill. Ha.)	21	21	21
----of commercial, tropical hardwood	-	-	-
----of commercial, temperate hardwood (mill. Ha.)	1,173	1,173	1,173
----of commercial, softwood (mill. Ha.)	2,310	2,310	2,310
--of forest area, non-commercial (mill.Ha.)	4	4	4
Forest Type			
--Of which, virgin	13	13	13
--Of which, plantation	11	11	11
--Of which, other commercial (regrowth)	1	1	1
Forest Ownership (mill. Ha.)			
--Nationally owned and no commercial access	4	4	4
--Nationally owned, commercial logging permitted	4	4	4
--Other publicly owned land, no commercial access	1	1	1
--Other publicly owned, logging permitted	2	2	2
--Privately owned commercial forest	14	14	14
Total Volume of Standing Timber (mill. cum)	3,483	3,483	3,483
--Of which, Commercial Timber (mill. cum)	2,463	2,463	2,463
Annual Timber Removal 1/	N/A	N/A	N/A
Annual Timber Growth Rate	N/A	N/A	N/A
Annual Allowable Cut	N/A	N/A	N/A
1/ If Removals exceeds growth rate, analyze impact in text.			

STRATEGIC INDICATOR TABLE 2: CONSTRUCTION MARKET			
Country: Japan Report Year: 1998	Previous Calendar Year	Current Calendar Year	Following Calendar Year
Total Housing Starts (number of units)	1,387,014	1,280,000	1,350,000
--Of which, wood frame	611,316	565,000	605,000
--Of which, steel, masonry, other materials	775,698	715,000	745,000
--Of total starts, residential	1,387,014	1,280,000	1,350,000

----Of residential, single family	629,412	580,000	620,000
----Of residential, multi-family	757,602	700,000	730,000
--Of total starts, commercial	46,105	43,000	45,000
Total Value of Commercial Construction Market ($US million)	270,892	25,000	256,000
Total Value of Repair and Remodeling Market ($US million)	N/A	N/A	N/A
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)	N/A	N/A	N/A
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/	N/A	N/A	N/A
--Estimated annual market expansion outlay ($US million) by country	N/A	N/A	N/A
Is the acceptability of U.S. style timber frame construction (i.e., per building codes, mortgage availability, etc.) high, medium or low? 3/	High	High	High
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/	High	High	High
If price quotes for construction and structural wood products are available, identify the leading source(s)	N/A	N/A	N/A

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.			

STRATEGIC INDICATOR TABLE 3: FURNITURE & INTERIORS MARKET			
Country: Japan Report Year: 1998	Previous Calendar Year	Current Calendar Year	Following Calendar Year
Total Housing Starts (number of units)	1,387,014	1,280,000	1,350,000
Total Number of Households)	44,107,856	N/A	N/A
Furniture Production ($US million)	6,549	6,200	6,400
Interiors Market Size ($US million)	25,106	24,000	24,500
Total Furniture Imports ($US million)	2,351	2,200	2,300
Total Furniture Exports ($US million)	252	270	300
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?	No	No	No
If yes, identify the following:			
--Country(ies) 2/	-	-	-
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 3/	-	-	-
--Estimated annual market expansion outlay ($US million) by country	-	-	-
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)	-	-	-

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.			

STRATEGIC INDICATOR TABLE 4: MATERIAL HANDLING MARKET			
Country: Japan Report Year: 1998	Previous Calendar Year	Current Calendar Year	Following Calendar Year
Total Value of Industrial Output ($US million)	2,236,202	2,236,000	2,276,000
New Pallet Production ($ US million)	539	540	550
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/	High	High	High
Identify leading source(s) of price quotes:	N/A	N/A	N/A
Are there market development programs for the materials handling market expansion funded by foreign governments?	No.	No	No
If yes, identify the following:			
--Which Countries?	-	-	-
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/	-	-	-
--Estimated annual market expansion outlay ($US million) by country	-	-	-
1/ If low or medium, explain in text of report. 2/ If "other", explain in text of report.			

STRATEGIC INDICATOR TABLE 5: FOREST PRODUCT TARIFFS AND TAXES (percent)						
Country: Japan Report Year: 1998	Product Description	Tariff Current Year	Tariff Following Year	Other Import Taxes or Fees 1/	Total Cost of Import	Export Tax
4379.21	Wood Chips	Free	Free	5.0	5.0	None
4403.10-20	Softwood Logs	Free	Free	5.0	5.0	None
4403.10.210-230	Temperate HW Logs	Free	Free	5.0	5.0	None
4403.91-92	Temperate HW Logs	Free	Free	5.0	5.0	None
4403.99.190-110-391-392.	Temperate HW Logs	Free	Free	5.0	5.0	None
4403.10.220	Tropical HW Logs	Free	Free	5.0	5.0	None
4403.41-49	Tropical HW Logs	Free	Free	5.0	5.0	None
4403.99.210-290-310-399	Tropical HW Logs	Free	Free	5.0	5.0	None
4404	Split poles/Piles,etc.	5.0-7.5	5.0-7.5	5.0	10.0-12.5	None
4405	Wood wool,flour	2.5	2.5	5.0	7.5	None
4406	Railway sleepers	Free	Free	5.0	5.0	None
4407.10. Softwood Lumber	< 160mm; Thickness					
-110; Pinus spp. Abies spp.	Picea spp; Planed	5.4	4.8	5.0	9.8	None
-121;Pinus spp.	Not planed	4.8	4.8	5.0	9.8	None
-129;	Other species	5.0	4.8	5.0	9.8	None
-210; Genus Larix	Paned or sanded	6.3	6.0	5.0	11.0	None
-290; Genus Larix	Not planed or sanded	6.5	6	5.0	11.0	None
4407.91-92	Temperate HW Lbr.	Free	Free	5.0	5.0	None
4407.99.100-210-290-400-500	Temperate HW Lbr.	Free	Free	5.0	5.0	None
4407.24; Tropical HW Lbr.	Virola, Mahogany	Free	Free	5.0	5.0	None
4407.25-26-29;Trop.HW Lbr.	Meranti,Lauan,etc.	6.8	6.0	5.0	11.0	None
4407.99.310-390	Tropical HW Lbr.	6.8	6.0	5.0	11.0	None
4408.10	Softwood veneers	5.0	5.0	5.0	10.0	None
4408.31;Meranti	Hardwood veneers	5.0	5.0	5.0	10.0	None
4408.39;Padok,Jeltong,Teak	Hardwood veneers	5.0-6.1	5.0-5.6	5.0	10.0-10.6	None
4408.90;Tsuge,Tagayasan, etc.	Hardwood veneers	5.0-6.1	5.0-5.6	5.0	10.0-10.6	None
4409.10;Softwood	Drawn wd,mouldings	3.8-5.5	3.6-5.0	5.0	8.6-10.0	None
4409.20;Non-Softwood	Drawn wd,mouldings	0.5-5.6	Free-5.0	5.0	5.0-10.0	None
4410.11-19; Particleboard,	Waferboards, OSB	5.6-6.3	5.0-6.0	5.0	10.0-11.0	None
4410-90; Other boards/sheets	Wood materials	7.3-8.0	6.6-7.9	5.0	11.6-12.9	None
4411.11-19; Fiberboard	Density >0.8g/cm3	3.1	2.6	5.0	7.6	None
4382.21	Dty>0.35g<0.8g/cm3	2.7	2.6	5.0	7.6	None

4412.13						None
-119	Hardwood Plywood	12.0	10.0	5.0	15.0	None
-122	Hardwood Plywood	10.0	8.5	5.0	13.5	None
-219	Hardwood Plywood	7.8	6.0	5.0	11.0	None
-229	Hardwood Plywood	6.7	6.0	5.0	11.0	None
4412.14.011;Tangue/groove	Hardwood Plywood	6.8	6.0	5.0	11.0	None
4412.14.019;Others	Hardwood Plywood	7.1	6.0	5.0	11.0	None
4412.19.011;Tang./groove	Softwood Plywood	6.8	6.0	5.0	11.0	None
4412.19.019; Others	Softwood Plywood	7.1	6.0	5.0	11.0	None
4412.22; With 1 trop.ply	Laminated Lumber	7.0-7.8	6.0	5.0	11.0	None
4412.23;With 1 particlebd.	Laminated Lumber	7.0-7.8	6.0	5.0	11.0	None
4412.29-92-93-99;Oths	Laminated Lumber	7.0-7.8	6.0	5.0	11.0	None
4413.00	Densified Wood	7.0	7.0	5.0	12.0	None
4414.00	Wooden Frames	3.2	3.2	5.0	8.2	None
4415; Crates, Pallets,	Packing cases,boxes	3.1-4.3	2.8-3.9	5.0	7.8-8.9	None
4416.00; Casks,barrels,	Vats, Tubs,etc.	2.4	2.2	5.0	7.2	None
4417.00; Tools,Tool bodies	Tool Handles,Broom	2.4-3.1	2.2-2.8	5.0	7.7-7.8	None
4418; Builder's Joinery &	Carpentry of Wood	2.4-5.6	2.0-5.0	5.0	7.0-10.0	None
4419.00; Tableware &	Kitchenware of Wood	3.0-5.2	2.7-4.7	5.0	7.7-9.7	None
4420; Wood Marquetry &	Inlaid Wood,caskets	3.0-12.0	2.7-10.0	5.0	7.7-15.0	None
4421; Other Articles of	Wood (eg.hangers)	3.5-4.3	2.9-3.9	5.0	7.9-8.9	None
4422	N/A					
4423	N/A					
4424	N/A					
4425	N/A					
9406.00; Prefabricated	Buildings & Parts	0.8	Free	5.0	5.0	None
1/ Japanese domestic consumption tax						

Market Segment Analysis

Construction Sector

- During 1997, as a result of weak consumer spending and declining housing starts in 1997, demand for imported wood fell by about 20% value-wise. Imports year-to-date for 1998, through April, totaled only $3.3 billion, down 44% from the same period last year. The U.S. market share led forest product suppliers at 22%, ahead of Canada's 14%. Though the Japanese government passed into law in June 1998 the largest tax cut of its kind designed to stimulate demand, 16.6 trillion Yen (about $119 billion), no measurable strengthening of consumer confidence has been seen. Efforts to stimulate housing also take the form of deregulation efforts undertaken by the Ministry of Construction and supported by the U.S. Government spearheaded by the U.S.-Japan enhanced initiative for housing. The benefits of these efforts for the U.S.

industry will be long-term. The forecast for 1999 is a slight recovery in housing starts driving higher levels of wood imports.

cJapanese housing starts in 1997, a sector of the construction market utilizing 70% of available wood products, fell to 1.387 million units, a 15.7% drop from the 1.643 million units of 1996. The impact of a 3% sales tax hike in effect after April 1997, the economic recession, a series of the government-driven deregulation programs affecting financial, business, and corporate institutions, reports of government's restructuring programs, and national indebtedness are factors contributing to consumer and home buying insecurity. As a result, 1997 was a major setback in consumer spending which normally accounts for 60% of the Japanese gross domestic product.

cDuring 1998, the industry forecasts housing starts will remain depressed because the above factors will continue. The housing start forecast, which seems to be continually revised downward, ranges between 1.270 million and 1.330 million. On hopes that a positive impact of the government's economic stimulus package may begin to be felt toward year-end, 1999 housing start performance is expected to be better than this year.

cDeclining values in the real estate market and homeowners' property has exacerbated the lackluster home building industry. Additionally, company bankruptcies, including small-scale wood-related industries, escalated during 1997 and continued into 1998.

cTotal year-to-date housing starts through May 1998 were 492,000, down 15% from the same term last year.

1998 Japan Housing Starts Update		
Sector	Units (YTD-May)	% Change From 1997
Total Starts	491,960	-15.0%
Detached/owner-built	176,838	-19.0%
Rental apartments	176,140	-13.4%
Corporate housing 1/	7,884	-16.8%
Speculative housing 2/	131,098	-11.3%
Wood framing 3/	218,161	-16.1%
Prefab. housing starts	71,586	-14.8%
2x4 wood framing	26,246	-19.5%
(Total floor area built/1,000 sq. meter)		
Total housing starts	46,855	-17.0%

Wood framing	24,928	-18.2%

Source: Ministry of Construction
Notes: 1/ Units, started by corporate entities, such as business or government.
2/ Units, started by developers for retail sale (i.e. a house and a lot).
3/ Wood framing as % of total starts in May 1998 was 46.4%, down 0.6 points from April, but year-to-date starts in May 1998 were up from 44.9% from the same term of last year .

Consumption

CThroughout 1997 and into 1998, an acute oversupply existed in the Japanese market for raw material logs and sawn or manufactured wood products, such as lumber and plywood. Recognition of this problem by the wood industry forced them to liquidate inventories by reducing production and purchases in a desperate effort to restore profitability in the face of shrinking demand. In some instances, these efforts to control supplies and return profitability were successful, but the overall lack of market demand remains the major bottleneck for greater wood consumption.

CThe downward trend in wood consumption and inventories, as shown below, illustrates these market developments.

Wood Industry Shipments & Inventory 1/

Product Line	1997(Full Yr.)	1998(Jan.-May.)
-Logs for Lumber		
Production:		
Shipments-	32,547	12,142
% Change- **2/**	**-7.9%**	**-15,8%**
Inventory-	4,988	4,673
% Change-**3/**	**-1.5%**	**-9.8%**
-Lumber:		
Shipments-	21,947	7,938
% Change-	**-9.3%**	**-16.6%**
Inventory-	1,514	1,614
% Change	**+25.0%**	**+18.1%**
-Logs for Veneer/		
Plywood Production:		
Shipments-	6,843	2,266

% Change-	**-5.6%**	**-25.0%**
Inventory-	1,107	986
% Change-	**-2.0%**	**-16.1%**
-Plywood:		
Shipments-	3,937	1,353
% Change-	**-15.0%**	**-19.0%**
Inventory-	546	516
% Change-	**+20.0%**	**+6.2%**

(Source: Ministry of Agriculture, Forestry & Fisheries-Statistics Bureau)

Notes: 1/ Unit of measurement for the number in "Shipments" & "Inventory" is 1000 m3(cubic meters).
2/ Represents a percentage change in volume, relative to 1996 and the same term of 5 months in 1997 for 1998.
3/ Represents a percentage change in volume, relative to the inventory level a year earlier for 1997 and as of the end of May 1997 for 1998. Inventories are as of the end of 1997 and of May 1998.

Policy Update

CThe two key Japanese government agencies involved in policy administration affecting wood markets are the Ministry of Construction and the Ministry of Agriculture, Forestry and Fisheries.

CThe Ministry of Construction, through the Housing Bureau, is responsible for implementation of the Japanese building codes and standards and for policy administration to enforce legal requirements of the Building Standard Law affecting all segments of the construction market. In 1994 the Ministry announced a policy guideline to help reduce escalating costs of the Japanese residential construction by 30% by 2000 and to promote programs supporting this policy through deregulation efforts.

In 1997 the Ministry lifted a ban on the construction of wood-framed, 3-story, multi-family residential units in Japanese quasi-fire protection districts (i.e. densely populated urban areas) where the high-rise wood-framing of apartments was previously prohibited as a fire-hazard. While a prior approval of the construction plan is required, subject to a separate appraisal process, the lifting of this ban was applauded by the wood industry as a new marketing opportunity. In June 1998 a bill was passed by the Japanese legislature stipulating a transition of the traditionally prescriptive Japanese building codes and standards to a set of performance-based standards. In other words, once a building product, including wood products, is proven to be free of structural and safety hazards through a predetermined product testing and appraisal process, that product may be used without constraint. The current building codes stipulate detailed requirements on the product specifications and where and how the product is used in construction.

A series of new product testing and performance-based appraisal requirements and procedures are to be finalized through 1999 with implementation of the new performance-based Building Standard Law scheduled to take effect in 2000. This historic revision in the building codes is expected to improve market opportunities for wood products, particularly for engineered wood products.

CThe Ministry of Agriculture, Forestry and Fisheries is responsible for administration of the Japan Agricultural Standards, known as JAS. JAS, affecting product standards and labeling requirements foods as well as wood products, is a voluntary set of standards viewed by the wood industry as a marketing or access tool for product market acceptance. As the market share of imported wood has grown, so has the number of overseas JAS-certified mills and wood industry associations authorized by the Ministry to test products and mills as Foreign Testing Organizations (FTO).

In 1997 the Minister of Agriculture, Forestry and Fisheries commissioned a task force , consisting of academic and industry experts, to review the current JAS program in response to criticism of its inefficiency and cost. The task force objective is to recommend new policy guidelines, including abolition of some outdated standards. The group, which began deliberations in October 1997, announced an interim report in June 1998. The report states that industry compliance with the updated JAS standards and procedures is essential in order to harmonize the JAS program with the importance of ISO (International Standards Organization) and changing market requirements under the new "performance-based" building codes in the making for wood products. Of interest to the U.S. wood export industry is a proposal that overseas Foreign Testing Organizations (FTO's) be given the authority as a Registered Grading Organization (RGO), currently confined to domestic Japanese organizations.

In July 1998 the Agricultural Affairs Office in Tokyo submitted a letter to MAFF presenting the U.S. industry position on issues discussed in the interim report. In December 1998 the JAS task force is scheduled to deliver a final report. The revisions, if legally adopted, are expected to reduce the cost of doing business in Japan for U.S. wood product exporters and make their activities more competitive.

Furniture & Interiors Sector

CJapanese imports of complete furniture products and of furniture parts, for assembly in Japan, are continuing to grow, further limiting Japan's wood industry of once-critical market opportunities, particularly for hardwood products. During 1997, imports of wood materials used for furniture stock, including parts, totaled 329.1 billion yen (about $2.351 billion @140 yen per $), up 43% from 2 years ago. The growth rate in wood furniture imports was 37.3% over 1995.

CHowever, furniture imports during the first 3 months of 1998 were down 7.7% from the same term last year because of depressed consumer spending in the midst of one of Japan's worst economic situations in recent years. Nonetheless, the upward trend in furniture imports is expected to continue, as shown in the table below.

Japan's Furniture Imports
(Billion yen/CIF Japan)
Full Year

Product	1989	1991	1993	1995	1997	1998
Wood furniture-	65.0	79.1	75.9	122.5	168.2	40.2
(% Change)	-	(+21.7)	(-4.0)	(+61.4)	(+37.3)	(-13.0) 1/
Rattan furniture-	17.9	16.1	14.2	13.5	10.7	2.7
(% Change)	-	(-10.0)	(-11.8)	(-4.9)	(-20.7)	(-22.8) 1/
Steel/metal furniture-	18.6	27.0	28.9	42.2	67.0	18.0
Furniture of others	4.1	6.1	5.1	6.4	8.2	2.0
Total Furniture:	105.6	128.3	124.1	184.6	254.1	62.9
(% Change)	-	(+21.5)	(-3.3)	(+48.8)	(+37.6)	(+10.4)
Furniture parts-	33.7	60.3	44.0	45.7	75.0	18.7
Grand Total:	139.3	188.6	168.1	230.3	329.1	81.6
(% Change)	-	(+35.4)	(-10.9)	(+37.0)	(+43.0)	(-7.7)

(Source: Ministry of Finance/Customs Data)
Note: 1/.Represents % change from the same term of 1997.

CTraditional wooden Japanese furniture includes the movable tansu drawers, dressers with or without mirrors, racks, tables, chairs, desks, and beds. Production in 1997 of these items by Japan's furniture industry, comprised of typically small companies scattered throughout the country specializing in woodwork, was 342 billion yen (about $2.4 billion @140 yen/$) in the wood furniture sector, down 5.1% from previous year.

CChanges in Japan's demographics, including the decline in the marriage rate and family size, changes in lifestyle, and consumer cost-consciousness, have increased the preference for cost-competitive imported furniture with attractive features. A highly competitive hardwood furniture market will continue with diminishing domestic hardwood resources further restricting Japan's domestic furniture industry.

Material Handling Market:

CWood importers and traders focus on the material handling sector only as a secondary marketing option because the Japanese construction and housing market dominates use of wood and commands the highest market price. The complexity of product specifications, regulated under Japan Industrial Standards (known as JIS), and highly demanding price and product expectations required for successful marketing, tend to limit sales of material handling products.

CLimited official information is available on the size of the material handling market. Indications are that the export crate market for Japanese manufacturing industries comprises the largest user of these materials. However, because the manufacturing investment for automobiles and electronics is moving offshore, such as Asia, North America, Europe, demand for these wood packing materials is declining.

CNon-construction grades and lower-valued lumber and panel products with a variety of specifications comprise the wood stock in this market. Softwood imports from New Zealand and Chile (e.g. Radiata Pine) dominate the market, including some off-grade Hem-Fir and Douglas Fir. Fir stock with the right market specifications and price is sold through specialized dealer channels.

CThe following table illustrates the size of the Japanese pallet market and the number of pallet producers in recent years.

Japan's Pallet Industry Shipments 1/

	1992	1993	1994	1995	1996
Shipments(Billion Yen)-	95.1	74.5	66.9	72.0	75.4
Number of Producers-	360	350	331	333	337

(Source: Ministry of International Trade & Industry-1996 Census of Manufacturers)
Note:1/ Value based on the producers' invoice. Number of producers are those with more than 4 employees.

Trade

Overview:

CJapanese wood imports in 1998 are expected to be below or just reach the 1997 level for most products. The contraction of the wood market, resulting in intense competition among market players and the loss of profitability, has resulted in continued pessimism by importers about a recovery in Japan's market. As a result they are reducing purchases of imported wood. Because of the lackluster housing starts limiting overall wood demand, the industry's top priority is to balance supplies and restore profitability.

CDuring January to April 1998, Japanese imports of forest products, including logs, lumber, and wood panels, excluding pulp/paper products, totaled $3.3 billion, down 43.6% from the same term last year. Of total imports, the U.S. share was 21.6%, Canada was 14.3%, Indonesia was 12.4%, Malaysia was 10.7% and China was 7.1%.

CIn June 1998 the Japanese government passed a bill designed to boost the economy, the largest of its kind, totaling 16.6 trillion yen (about $119 billion). The full impact of this measure remains to be seen because the economic stimulus package won't be implemented until later 1998. The objective is to restore consumer confidence, improve housing starts, and increase wood demand in 1999.

Following is a review of 1997 performance and a trade outlook for key product lines.

Softwood Logs:

COf the total 13,962,000 m3 imported in 1997, the U.S. share of Japan’s imports was 5,547,000 m3, or 40%, down 19% from 6,834,000 of last year. Russia, on the other hand, led the roster of key log suppliers with 5,750,000 m3, a 41% share, up from 5,017,000 m3 in 1996.

CAccording to trade sources, Japan’s 1998 imports from North America (i.e. United States and Canada) are expected to drop to about 4,400,000 m3, down 22% from 1997 and the lowest level in nearly 30 years.

Softwood Lumber-

CJapan’s imports in 1997 totaled 10,682,000 m3, up 6% from previous year. Canada, as usual, led the group of key suppliers with 52% share of the total, followed by the US with its 12% share. Canada’s 1997 share of exports to Japan, however, was down 5% from 1996.

CJapanese industry sources forecast that 1998 imports from North America would be approx. between 4,200,000 and 4,500,000 m3, down from 6,892,000 m3 in 1997.

Hardwood Lumber-

CIn 1997, temperate hardwood lumber imports totaled 1,007,000 m3, up from 980,000 m3 in the previous year. China was the largest supplier with 29% share. The US share was 229,000 m3, up 12% from 205,000 m3 in 1996, and accounted for 23% of the total volume.

Tropical hardwood lumber imports, supplied predominantly by Indonesia and Malaysia, reached 499,000 m3 in 1997, down 57% from the previous year.

CNo significant change is forecast for 1998 imports, relative to 1997.

Hardwood Plywood-

CSupplied by Indonesia and Malaysia, 1997 imports totaled 4,596,000 m3, slightly down from 4,665,000 of the previous year.

CWith substantially devalued currency values making their exports more cost-competitive, there will increased opportunities for growth in exports to Japan. However, lack of Japanese market demand and a highly cautious importer buying stance will likely limit these imports, and 1998 imports may be restrained to the same level as 1997.

Softwood Plywood:

CCanada and New Zealand supplied 85% of the total 1997 import volume, totaling 425,000 m3.
The U.S. market share was 40,000 m3, or 9.4%.

COSB (Oriented Strand Board) from Canada and the U.S. is gradually dominating the structural panel market as a key product, and no significant change is forecast for 1998.

Engineered Products:

Glulam stock-

CAbout 267,000 m3 in softwood structural glulam was imported in 1997, up 15% from the previous year. The U.S. share was 39.2% of the volume. Non-structural glulam imports, used primarily for decorative applications, totaled 80,000 m3 in the species mix of softwood and hardwood, up 82% from the previous year, and U.S. share accounted for 7%.

CIn the absence housing demand, the glulam market is oversupplied due to increased domestic production and significant growth in imports, resulting in a market with depressed prices. In 1998 imports are expected to drop substantially from last year.

Particleboard/OSB(Oriented Strand Board)-

CDuring 1997 imports of particleboard, including OSB from Canada and the United States, totaled 672,000 m3, up 28.4% from the previous year. Utilized mostly for wood furniture, housing interior production, and, in the case of OSB, structural panels in the construction sector, imports of this product have been growing in recent years, accounting for 35% of the total distribution volume in 1997.

The total fiberboard market in 1997, consisting of Japanese domestic productions and imported stock, is shown below.

Fiberboard Market in 1997
(1,000 m3)

Product	Total Distribution	% Change from 1996	Imports	Import Share
Hardboard	175	-0.2%	64	36.6%
MDF(Medium Density)	877	+6.7%	484	55.2%
Insulation Board	633	-4.8%	17	2.7%
Particleboard	1,904	+4.9%	672	35.3%
Total:	3,589	+3.2%	1,237	34.5%

(Source: Japan Fiberboard Industry Association)

CIndustry shipments in 1997 were down 5% to 10% from the previous year in all of industrial sectors for these products (e.g. autos, electronics) except for MDF, where shipments grew 7%. Japan's recession and deterioration of export markets for key Japanese industries in Asia have resulted in an oversupply with eroded market prices. In 1998 imports are expected to level-off significantly.

LVL(Laminated Veneer Lumber):

CImports in JFY1997 (Apr.'97-Mar.'98) totaled 60,000 m3, down 21% from the previous year. About 83% of imports came with softwood stock. Total distribution volume on the market also dropped 15% from the previous year to 213,000 m3 as a result of decreased demand.

CThe domestic industry infrastructure of this highly engineered product is confined to a few producers with limited capacity growth, as with most countries exporting LVL products to Japan. These companies lack the economies-to-scale to make product costs more market-competitive. Although an opportunity for import growth exists, the Japanese building industry needs to be made more conscious of the cost-performance benefits of these engineered products. No significant change in the short-term future of Japanese imports is foreseeable at this time.

Production

Logs:

CJapanese domestic log production in 1997 totaled 21,547,000 m3, down 922,000 m3 or 4.1% from previous year. Of this total volume, softwood accounted for 17,323,000 m3(80.4%) and temperate hardwood for 4,224,000 m3(19.6%).

CImported log supplies to the wood manufacturing industry in 1997 totaled 24,937,000 m3, accounting for 47.1% of the total log volume supplied, which was 46,484,000 m3.   The share of each key world source of supply as % of the total log volume supplied was as follows.

North America(Softwood):	11,212,000 m3..........45.0%
South-East Asia(Tropical hardwood)	5,537,000 m3..........22.2%
Russia(Softwood)	5,363,000 m3..........21.5%

CIn terms of industry demands for the raw material logs, lumber industry led all other sectors, accounting for 71.3% of total log supplies (i.e. 33,148,000 m3).   Plywood industry demands accounted for 14.7% (i.e. 6,830,000 m3).   Due to continuing stability in the market share of imported lumber and ply-wood products and production curtailment by industry, caused by depressed housing starts and declined wood demands throughout most of 1997, however, these industry demands for logs were down 6.7% for lumber and 6.5% for plywood production from previous year, respectively.

Lumber:

C1997 lumber production was 21,698,000 m3, down 9% from 23,844,000 m3 in the previous year.

CThe number of sawmills supporting this level of production was 13,496, down 532 mills or 4% from the previous year.

COf the total 33,148,000 m3 in logs supplied to lumber mills in 1997, 53.5% (17,718,000 m3) was imported wood and 46.5% (15,430,000 m3) was domestic.   Because of depressed market demand, however, compared with last year the share of imported logs was 8.7% less and that of domestic species was 4.5% less.

Plywood/ Wood Flooring:

CA total volume of 6,830,000 m3 in logs, with a predominant share of imported hardwood, was supplied to Japan’s veneer and plywood mills. About 4,226,000 m3 of plywood was produced in 1997, comprised of 3,118,000 m3 of hardwood plywood (73.8%) and 1,108,000 m3 of softwood plywood (26.2%).

CCompared with 1996, however, production volume in 1997 on a square meter basis declined 11% because of decreased demand from the depressed housing sector.   Plywood production with thicknesses of 6mm-12mm and over 12mm, used primarily in the commercial and residential construction sector, was down 6% and 5% from 1996. Production of specifications of 3mm-6mm and below 3mm in the product thickness, typically used in the wood furniture production, was down 19% and 9% from the previous year.

CPlywood produced from imported wood veneer in 1997 totaled 164,000 m3, comprised of 120,000 m3 of hardwood plywood (73%) and 44,000 m3 of softwood plywood (27%). Processed and imported raw material veneer used to produce plywood totaled 173,000 m3 in 1997 and comprised the following product mix.

-Hardwood veneers: 127,000 m3
-Softwood veneers: 46,000 m3

Total 1997 plywood production amounted to 4,390,000 m3 with the following product breakdown.

-Hardwood plywood: 3,162,000 m3 (72%)
-Softwood plywood: 1,228,000 m3 (28%)

CAbout 420 Japanese plywood and veneer mills existed at the end of 1997, down 4% from the previous year. The loss of manufacturing competitiveness in Japan and increased stability of cost-competitive plywood imports attribute for the consistent decline in the domestic manufacturing capacity.

CMost of the wood flooring stock produced in Japan are made up of plywood corestock, glued with very thin wood veneer and kiln-dried for visual and aesthetic appearance. Production in 1997 of such flooring stock was 3,557,000 m3, down 18% from the previous year. The number of producing mills was 37, down 7% from 1996.

PSD Table and Trade Matrix

Softwood Plywood

PSD Table						
Country:	Japan					
Commodity:	Softwood Plywood					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	980	1228	1000	1200	0	1300
Imports	550	425	700	400	0	450
TOTAL SUPPLY	1530	1653	1700	1600	0	1750
Exports	0	0	0	0	0	0
Domestic Consumption	1530	1653	1700	1600	0	1750
TOTAL DISTRIBUTION	1530	1653	1700	1600	0	1750

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Softwood Plywood			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
China	0.5		
Hong Kong	0.5		
Total for Others	1		0
Others not listed	0		0
Grand Total	1		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Softwood Plywood			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	30	U.S.	40
Others		Others	
Canada	357	Canada	314
New Zealand	44	New Zealand	49
Total for Others	401		363
Others not listed	18		22
Grand Total	449		425

Hardwood Plywood

PSD Table						
Country:	Japan					
Commodity:	Hardwood Plywood					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	4200	3162	3680	3000	0	3000
Imports	4900	4596	5300	4500	0	5000
TOTAL SUPPLY	9100	7758	8980	7500	0	8000
Exports	3	0	3	0	0	0
Domestic Consumption	9097	7758	8977	7500	0	8000
TOTAL DISTRIBUTION	9100	7758	8980	7500	0	8000

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Hardwood Plywood			
Time period:	Jan-Dec		

Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Malaysia	3	Rep. of Korea	0
Rep. of Korea	1		
Total for Others	4		0
Others not listed	2		0
Grand Total	6		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Hardwood Plywood			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	8	U.S.	0
Others		Others	
Indonesia	3117	Indonesia	3,092
Malaysia	1473	Malaysia	1504
Taiwan	13		
China	3		
Total for Others	4606		4596
Others not listed	51		0
Grand Total	4665		4596

Hardwood Veneer

PSD Table						
Country:	Japan					
Commodity:	Hardwood Veneer					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	3996	3328	3590	3200	0	3450
Imports	150	127	158	100	0	150
TOTAL SUPPLY	4146	3455	3748	3300	0	3600
Exports	0	11	0	0	0	0
Domestic Consumption	4146	3444	3748	3300	0	3600

TOTAL DISTRIBUTION	4146	3455	3748	3300	0	3600

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Hardwood Veneer			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Indonesia	5	Indonesia	5
Malaysia	1	Malaysia	3
		Rep. of Korea	1
Total for Others	6		9
Others not listed	3		2
Grand Total	9		11

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Hardwood Veneer			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	10	U.S.	8
Others		Others	
Malaysia	96	Malaysia	80
China	16	China	20
Indonesia	4	Indonesia	4
Canada	2	Philippines	3
Germany	1	Germany	2
		Canada	2
		Paraguay	2
Total for Others	119		113

Others not listed	13		6
Grand Total	142		127

Tropical Hardwood Lumber

PSD Table						
Country:	Japan					
Commodity:	Tropical Hardwood Lumber					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	600	561	570	500	0	500
Imports	1200	499	1200	500	0	600
TOTAL SUPPLY	1800	1060	1770	1000	0	1100
Exports	0	0	0	0	0	0
Domestic Consumption	1800	1060	1770	1000	0	1100
TOTAL DISTRIBUTION	1800	1060	1770	1000	0	1100

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Tropical Hardwood Lumber			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Total for Others	0		0
Others not listed	0		0
Grand Total	0		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Tropical Hardwood Lumber			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Malaysia	414	Malaysia	288
Indonesia	343	Indonesia	146
China	84		
Italy	23		
Philippines	18		
Canada	18		
Brazil	17		
Thailand	11		
Australia	11		
Total for Others	939		434
Others not listed	214		65
Grand Total	1153		499

Temperate Hardwood Lumber

PSD Table						
Country:	Japan					
Commodity:	Temperate Hardwood Lumber					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	810	722	800	700	0	700
Imports	990	1007	1000	950	0	1050
TOTAL SUPPLY	1800	1729	1800	1650	0	1750
Exports	5	1	5	1	0	1
Domestic Consumption	1795	1728	1795	1649	0	1749
TOTAL DISTRIBUTION	1800	1729	1800	1650	0	1750

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Temperate Hardwood Lumber			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Taiwan	1	Malaysia	0.5
Germany	3	Indonesia	0.5
Total for Others	4		1
Others not listed	1		0
Grand Total	5		1

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Temperate Hardwood Lumber			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	205	U.S.	229
Others		Others	
China	295	China	295
Indonesia	200	Indonesia	195
Malaysia	172	Malaysia	178
Canada	23	Canada	18
Philippines	15	Philippines	11
Brazil	13	Brazil	11
Thailand	11	Thailand	14
Australia	11	Chile	4
Italy	6	Italy	4
Chile	4	Australia	9
Total for Others	750		739
Others not listed	25		39
Grand Total	980		1007

Softwood Lumber

PSD Table						
Country:	Japan					
Commodity:	Softwood Lumber					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	22000	20416	21000	20000	0	20000
Imports	10500	10682	11000	10000	0	11000
TOTAL SUPPLY	32500	31098	32000	30000	0	31000
Exports	0	0	0	0	0	0
Domestic Consumption	32500	31098	32000	30000	0	31000
TOTAL DISTRIBUTION	32500	31098	32000	30000	0	31000

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Softwood Lumber			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Total for Others	0		0
Others not listed	0		0
Grand Total	0		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Softwood Lumber			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	1733	U.S.	1300

Others		Others	
Canada	5883	Canada	5592
Finland	445	Finland	584
Chile	406	Chile	608
Russia	406	Russia	523
Sweden	341	Sweden	792
New Zealand	282	New Zealand	335
Austria	282	Austria	463
Germany	32	China	107
		Germany	93
Total for Others	8077		9097
Others not listed	305		285
Grand Total	10115		10682

Wood Chips

PSD Table						
Country:	Japan					
Commodity:	Wood Chips					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	5500	5,421	5600	5000	0	5500
Imports	13600	13,883	13700	13000	0	13500
TOTAL SUPPLY	19100	19304	19300	18000	0	19000
Exports	0	0	0	0	0	0
Domestic Consumption	19100	19,304	19300	18000	0	19000
TOTAL DISTRIBUTION	19100	19304	19300	18000	0	19000

Export Trade Matrix			
Country: Japan		Units:	1000 MT
Commodity: Wood Chips			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Total for Others	0		0

Others not listed	0		0
Grand Total	0		0

Tropical Hardwood Logs

PSD Table						
Country:	Japan					
Commodity:	Tropical Hardwood Logs					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	0	0	0	0	0	0
Imports	6200	4933	6000	4500	0	5000
TOTAL SUPPLY	6200	4933	6000	4500	0	5000
Exports	0	0	0	0	0	0
Domestic Consumption	6200	4933	6000	4500	0	5000
TOTAL DISTRIBUTION	6200	4933	6000	4500	0	5000

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Tropical Hardwood Logs			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Total for Others	0		0
Others not listed	0		0
Grand Total	0		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Tropical Hardwood Logs			

Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Malaysia	3424	Pap. New Guinea	1924
Pap.New Guinea	1737	Malaysia	1744
Solomon Islands	386	Solomon Islands	401
Gabon	378	Gabon	229
Russia	227	Russia	212
Cameroon	86	Eq. Guinea	123
Eq.Guinea	56	Cameroon	118
China	37	China	42
Total for Others	6331		4793
Others not listed	67		140
Grand Total	6398		4933

Temperate Hardwood Logs

PSD Table						
Country:	Japan					
Commodity:	Temperate Hardwood Logs					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1998
Production	4200	4224	4000	4200	0	4100
Imports	330	287	350	300	0	300
TOTAL SUPPLY	4530	4511	4350	4500	0	4400
Exports	0	0	0	0	0	0
Domestic Consumption	4530	4511	4350	4500	0	4400
TOTAL DISTRIBUTION	4530	4511	4350	4500	0	4400

Export Trade Matrix

Country: Japan		Units:	1000 m3
Commodity: Temperate Hardwood Logs			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Total for Others	0		0
Others not listed	0		0
Grand Total	0		0

Import Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Temperate Hardwood Logs			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	77	U.S.	76
Others		Others	
Russia	178	Russia	175
China	20	China	18
Denmark	5	Denmark	5
Pap.New Guinea	3	Germany	5
France	2	North Korea	2
		Pap.New Guinea	2
		France	2
Total for Others	208		209
Others not listed	2		2
Grand Total	287		287

Softwood Logs

PSD Table						
Country:	Japan					
Commodity:	Softwood Logs					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	18000	17323	17900	17000	0	16000
Imports	14500	13962	14000	13000	0	15000
TOTAL SUPPLY	32500	31285	31900	30000	0	31000
Exports	4	2	5	5	0	5
Domestic Consumption	32496	31283	31895	29995	0	30995
TOTAL DISTRIBUTION	32500	31285	31900	30000	0	31000

Export Trade Matrix			
Country: Japan		Units:	1000 m3
Commodity: Softwood Logs			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Rep. of Korea	3	Rep. of Korea	2
Total for Others	3		2
Others not listed	0		0
Grand Total	3		2

Import Trade Matrix			
Country:		Units:	1000 m3
Commodity:			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	6834	U.S.	5547
Others		Others	
Russia	5017	Russia	5750
New Zealand	2134	New Zealand	1981
Finland	146	Chile	153
Chile	128	Canada	117
Canada	119	Finland	107
Total for Others	7544		8108
Others not listed	273		307
Grand Total	14651		13962