Foreign Agricultural Service
GAIN Report
Global Agriculture Information Network

Required Report - public distribution

Date: 12/18/2001

GAIN Report #BR1625

Brazil

Solid Wood Products

Annual

2001

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Report Highlights:
Production of solid wood products is expected to rebound in 2002. The two major factors contributing to an optmistic production year are: stronger growth in the construction sector in Brazil and higher exports of solid wood products.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Brasilia [BR1], BR

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Executive Summary

Current economic indicators suggest that the Brazilian economy fared well despite the effects of the economic crisis in neighboring Argentina, a weakening currency relative to the dollar, a domestic energy shortage, and weakening global economy. Economic growth and inflation are forecast at 1.7 percent and 7.3 percent, respectively, in 2001. The outlook for 2002 calls for a rebound in the major economic indicators, such as economic growth at 2.3 percent, inflation at 4.8 percent, and a major trade surplus of US$4 billion. Unemployment rate should continue at approximately 7 percent next year.

Production of all solid wood products is expected to increase in 2002 because of the estimated rebound of the Brazilian economy in 2002. The forest products sector will benefit from growth in two major areas: stronger growth in the construction sector, and higher exports of lumber, plywood, and furniture.

Production

Forest Situation Report/Outlook

Brazil remains without a reliable inventory of its forest resources, which makes it difficult to estimate the exact forest area. There is no official data on solid wood production. Information provided in the Forest Area Strategic Indicator Table and on the PS&D tables are our best estimates, and data is derived from interviews with *industry leaders and unofficial data furnished by our contacts in the sector.*

Brazil has a rich and diversified vegetation characterized by various forest ecosystems, which results from climatic, geological, and relief differences found in its vast territory. The principal forest resource base of Brazil is the Amazon region with approximately 260 million hectares or 40 percent of Brazil's territory. It contains nearly 80 percent of the forest resources of the nation. The other important resource base is the "Cerrado" (savanna) with 140 million hectares or 25 percent of the country's territory, followed by the "Caatinga" with 83 million hectares in the drylands of Brazil's Northeast region. Other important ecosystems are the "Pantanal" in the wet land areas of Central Brazil, the Atlantic forest along the coast of Brazil, and the temperate forest of the South, mostly consisting of pines and eucalyptus plantations.

The native forests cited above are not the only major source of timber for Brazil's forest products industry. In fact, the panel products and the pulp and paper industries rely mostly on industrial plantations with an estimated area of 6 million hectares. While most of the native forests are made up of hardwoods, such as the Amazon region which accounts for nearly 20 percent of the world's tropical hardwood forest resources, the industrial plantations consist primarily of eucalyptus (50 percent) and pine (40 percent). Except for the Amazon forest, the location of major stands is relatively close to the forest products industry, as well as to the pulp and paper mills. Except for the Amazon region, where seasonal floods are a major constraint, accessibility to timber resources is not a major problem in Brazil. However, since most logs are transported long distances by trucks, fuel costs and poor road conditions significantly increase production costs. Although growth rates can be as high as 80 cum/ha/year in some of the most modern eucalyptus plantations, the average growth rates are much lower due to poor management, harvesting practices, and lack of technology.

Conservation and environmental policies in Brazil are restricting further illegal timber cuts, mostly in the Atlantic forest. However, in the Amazon, illegal timber removals remain a major problem despite the heavy penalties that can be applied by Brazilian inspectors. There are no reliable numbers on illegal timber removed from the Amazon region. Our best estimate is that about 25 million cubic meters of logs are removed from the Amazon region, per year, and only 20 percent are from areas with forest management. All other timber comes from illegal deforestation, Indian reserves, and public lands. Contrary to what is commonly said, illegal timber from the Amazon is not exported, but its major destination is the Southeast and Southern regions of Brazil, mostly the state of Sao Paulo. According to the Association of Timber Exporters from the State of Para (AIMEX), the volume of timber exported from the Amazon region corresponds to the volume removed from areas under forest management.

In addition to the illegal timber removals, the commercial forest sector in the Amazon also faces other constraints which contribute to higher production costs, such as: lack of adequate long-term financing, international pressure for conservation and preservation of the Amazon forest, competition with livestock (cattle raising), crops (mostly soybeans in the new frontier areas), road openings, forest burnings, and the landless agrarian movement in Brazil.
The most recent survey of the Amazon deforestation shows that the rate of deforestation reached 14.9 percent, between August 1999 and August 2000, which raised strong criticisms from environmental NGOs. Trade sources in the Amazon have reported to OAA that forestry related activity is actually responsible for only 2 percent of the total deforestation in the Amazon region. During a recent international congress in Belem, wood exporters from the Amazon region expressed their concerns that, in Brazil, one government agency (IBAMA) deals at the same time with forest industry development and environmental issues, with environmental policies frequently overruling commercial forest development policies.

Most of the forests in Brazil are privately owned and managed, while government forests are mostly for protection and preservation. Government incentives for reforestation and afforestation projects ended in 1986. Since then, practically all reforestation projects have been carried out by private companies, mostly by the pulp and paper, charcoal, and panel industry sectors. From 1987 through 1992, the average annual reforested area in Brazil was 197,000 hectares, which dropped to an average of 150,000 hectares, per year, during the past 5 years. Industry leaders estimated that by 2005 Brazil may have problems in meeting domestic wood demand. They estimate the current deficit of reforested area in Brazil around 300,000 hectares, per year. Total investment during 6 years required for new planted forest areas, per year (300,000 hectares), is estimated at US$1.5 billion.

Since our last annual report, two major issues have affected the forest sector in Brazil: a) The revision of the Brazilian National Forest Code of 1965, and b) the National Forest Plan (PNF, in Portuguese). The revision of the Forest Code, Law 4,771/65, which was altered by Provisional Measure Number 2,080/96 (now in the 67th edition), increased the forest protection in each individual farm in the Amazon from 50 to 80 percent of each farm. On September 5, 2001 a draft proposal prepared by Congressman Micheletto was approved by the Joint Committee of the Congress which revised the Forest Code. To become law and replace the Forest Code, the bill must be approved by a joint session of the Congress (House and Senate), and submitted to the President for final signature. The draft bill, approved under intense pressure by a national campaign organized by nearly 310 NGOs, decreases the protection area in the Amazon from 80 to 50 percent, per farm, and in the Cerrado region from 35 to 20 percent. This battle over the reform of the Forest Code will continue throughout next year.

The National Forest Plan (PNF) was created by Presidential Decree No. 3,420 on April 20, 2000, but was officially announced in October of 2000. The PNF is part of a major National Government Plan (PPA 2000-2003), and has three main program areas: a) Expansion of the planted and managed forest base (Florestar), b) Sustainable Forests (Sustentar), and, c) Prevention against Deforestation, Burnings, and Forest Fires (Florescer). Total investments allocated for these program areas are estimated at US$1.5 billion over a 3 year-period. For 2001, the program has funds allocated by both private and public parties of US$285 million. The most important aspects of the PNF are:

a) increase by 50 million hectares (124 million acres) the National Forests (FLONAS) in the legal Amazon area by the year 2010 (10 million hectares by 2003). Currently, Brazil has 49 FLONAS totaling 15 million hectares, of which 99 percent are in the Amazon. The regulatory framework for the FLONAS is from 1994 (Decree Number 1298), but so far only one FLONA (Tapajos), in the Amazon was open for an experimental exploitation of its forest resources. Final regulations to allow the private sector to explore these forests are not in place yet;

b) ensure that 10 percent of the future demand for logs is supplied from these FLONAS;

c) designate 20 million hectares of forests in the Amazon region for a sustainable production program by 2010;

d) create a forest development fund with an annual budget of US$40 million;

e) improve logging efficiency by 50 percent, by 2003;

f) increase Brazil’s share of the world tropical wood market from 4 to 10 percent by 2010;

e) increase exports of high-value wood products (including furniture products) by 30 percent by 2010; and,

f) maintain the current leadership in both the domestic and external markets for pulp and paper.

Solid Wood Products Situation/Outlook

1. Tropical hardwood logs. Production is expected to recover in 2002 reflecting an improvement in the Brazilian economy and a 100 percent increase in the area of Certified Forest in the Amazon region. Wood producers in the Amazon are obtaining 20 percent above the market price for certified wood, which is expected to increase in 2002. Demand for forest certification is increasing. The Forest Stewardship Council (FSC) has accredited three institutions in Brazil to issue forest certificates and the Brazilian government has recently announced the Certification of Origin of Forest Raw Material - CERFLOR, in partnership with several Brazilian institutions.

2. Tropical hardwood lumber. The lumber industry in Brazil is composed of nearly 10,000 companies, mostly small and medium scale companies. Over the past 5 years, the lumber industry has gone through structural changes, increasing its competitiveness, technology, and investment. The distribution of lumber in Brazil by main sectors are: retail (36 percent), construction (21 percent), furniture (16 percent), industry in general (15 percent), and all others (12 percent). The wood originating from planted forests has increased its share of total lumber produced from 25 percent in the early 1990's to approximately 30 percent this year.

Production of hardwood lumber is expected to increase by nearly 4 percent in 2002, reflecting higher demand from the domestic market. The Brazilian government has announced a new line of home financing for the middle class of nearly US$1 billion, which should improve demand for wood by the construction sector in 2002. The devaluation of the Brazilian currency is also improving exports of Brazilian hardwood lumber which became more competitive in the world market.

3. Softwood lumber. Production from pine plantations in the South continues to rise as plantations began to mature, and export demand remains high. However, recent studies conducted by forest consultants for the paper and pulp industries, in the southern region of Brazil, predict a deficit in softwood lumber production if further investments in afforestation projects are not accelerated.

4. Softwood plywood. The Brazilian plywood association does not differentiate between softwood and hardwood plywood production. However, based on interviews with industry sources, OAA has updated the breakdown in production to identify the origin of the wood using 40 percent for softwood harvested (from the planted pine forests in the south and southeast regions) and 60 percent for hardwood. The plywood industry in Brazil consists of nearly 300 companies, of which 62 percent are medium and large scale companies, while 38 percent are small scale companies. The installed production capacity of the plywood industry in Brazil is estimated at 2.3 million cubic meters, of which 40 companies account for 60 percent of this capacity. The breakdown of plywood production in Brazil is distributed as follow: furniture (45 percent), construction (34 percent), packaging (17 percent), all others (4 percent).

Total production of plywood (both hardwood and softwood) is expected to rebound in 2002, following poor production in 2001. Trade sources expect an improvement in export prices of plywood and higher demand from the domestic market, mostly from the furniture sector. Brazil’s furniture exports are booming to markets in Europe and in the United States. In addition, the construction sector is expected to recover in 2002.

Trade

Overview/Outlook

The total value of Brazilian exports of forest products in 2000, including charcoal (chapter 44 of HTS), reached approximately US$1.5 billion, up 6 percent from record levels in 1999. Sawnwood exports at US$ 520 million, were up 4.5 percent from 1999, reflecting increased exports of softwood lumber from planted forests in southern Brazil. However, export prices were lower in 2000 compared to 1999 due to an excess of softwood lumber in the northern hemisphere. The major markets for Brazilian lumber were: United States (36 percent), France (11 percent), Spain (7 percent), and China (5 percent). In 2000, exports of plywood also recuperated and increased by over 23 percent in volume, and 8 percent in value reaching US$374 million, despite a drop in world prices of 12 percent. The increase in exports were due to new markets and the devaluation of the Brazilian currency in 1999. During the same period, imports of forest products reached US$70 million, up 2 percent from 1999.

Based on January-October data, we estimate for 2001 another record year for exports of forest products at US$1.6 billion, and a drop in imports of 17 percent. The most important reason is the devaluation of the Brazilian currency during 2001. In 2002, Brazil's forest products exports are expected to reach new record levels while imports will stabilize, mostly from MERCOSUL countries.

Competition

The federal government has identified 12 productive "chains" from the Brazilian industry in general, including the wood and furniture sectors, as having potential to increase their international competitiveness, generate jobs and income, and promote development and positive trade balances. The Export Promotion Agency - APEX, created by the federal government in 1997, is responsible for coordinating and financing up to 50 percent of the cost of promoting Brazilian products overseas, and attracting more small and medium sized companies into the export business. APEX, has two programs related to the forest sector, which are similar to FAS Market Access Program: APEX/ABIMOVEL - The Brazilian Association of Furniture Industry, and APEX/ABIMCI - The Brazilian Association of Mechanically Processed Timber.

The APEX/ABIMOVEL is a cost-sharing market promotion program valued at US$6.5 million (50 percent paid by APEX) to promote Brazilian furniture in targeted markets, such as the United States and Europe. The goal is to increase furniture exports by 19 percent, per year, until 2004, and increase the current total export value of the sector to US$1 billion. Promotional activities include: market research, trade shows, trade missions, reverse trade missions, advertising in specialized media, and publication of catalogs. The Brazilian furniture sector is composed of more than 70,000 firms, mostly small companies, with a total gross income of US$4.1 billion.

The APEX/ABIMCI is also a cost-sharing market promotion program, but has not been fully implemented. To date, APEX financed 30 percent of a Brazilian trade mission to China and Japan to research market opportunities for Brazilian plywood. ABIMCI is now proposing a major market promotion program valued at US$8 million to double Brazilian exports of plywood within 4 years. According to ABIMCI contacts during the International Congress in Belem, market promotion efforts are targeted at high-value products, and will include activities in the most important world trade shows, visits to importers, mostly in Europe, reverse marketing missions, specialized media teams, and catalogs.

Statistical Information

Strategic Indicator Tables

Forest Area

STRATEGIC INDICATOR TABLE: FOREST AREA (million hectares/million cum)			
Country: Brazil	2000	2001	2002
Report Year: 2001	Calendar Year	Calendar Year	Calendar Year
Total Land Area	846	846	846
Total Forest Area	412	412	412
--of which, Commercial	245	245	245
----of commercial, tropical hardwood	240	240	239
----of commercial, temperate hardwood	2	2	3
----of commercial, softwood	3	3	3
--of forest area, non-commercial	167	167	167
Forest Type			
--Of which, virgin	202	195	180
--Of which, plantation	5	5	6
--Of which, other commercial (regrowth)	2	2	2
Forest Ownership			
--Nationally owned and no commercial access	167	167	167
--Nationally owned, commercial logging permitted	1	1	1
--Other publicly owned land, no commercial access	n/a	n/a	n/a
--Other publicly owned, logging permitted	n/a	n/a	n/a
--privately owned commercial forest	n/a	n/a	n/a
Total Volume of Standing Timber	n/a	n/a	n/a
--Of which, Commercial Timber	n/a	n/a	n/a
Annual Timber Removal 1/	166	168	170
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.			

Wood Products Subsidies

STRATEGIC INDICATOR TABLE: WOOD PRODUCTS SUBSIDIES			
Country: Brazil	2000	2001	2002
Year of Report: 2001	Calendar Year	Calendar Year	Calendar Year
Total Solid Wood Export Subsidy Outlay ($US million)	0	0	0
Is there a ban on the export of logs, lumber, or veneer? If yes, which?	yes (logs)	yes (logs)	yes (logs)
Are there export taxes (yes/no)? 1/	no	no	no
If yes, for which products? (Identify export tax level in tariff table)			
Source(s) of Export Subsidy Information			
Total Wood Production Subsidy Outlay ($US million)	5	6	7
Are there any programs favoring the development of commercial forestry?	yes	yes	yes
If yes, Post best estimate of scope (thousands of hectares)	100	100	100
If yes, Post's best estimate of financial outlay ($US million)	101	80	95
Source(s) of Production Subsidy Information			
Does the country support export expansion activities similar to the Cooperator Program?	yes	yes	yes
--Which country markets are targeted?	USA, E.U.	USA, E.U.	USA, E.U.
--Which products are targeted?	Furniture	Furniture/Plywood	Furniture/Plywood
Are there significant wood products export expansion activities at the provincial or regional level?	yes	yes	yes
--If yes, identify key players	Abimovel/Abimci	Abimovel/Abimbi	Abimovel/Abimci
--If yes, identify key market segments			
--If yes, identify key country markets	USA, E.U.	USA, E.U..	USA,E.U.
--If yes, identify key products	furniture/plywood	furniture/plywood	furniture/plywood

--Post's estimate for combined outlay ($US million)	4	5	14.5
Source(s) of Provincial/Regional Support Information			
Are there other wood products export expansion activities? If yes, describe in report.	yes	yes	yes

Tariffs and Taxes

STRATEGIC INDICATOR TABLE: FOREST PRODUCT TARIFFS AND TAXES (percent)						
		Tariff	Tariff	Other		
Country: Brazil	Product	2001	2002	Import	Total Cost	Export
Report Year: 2001	Description 1/	Year	Year	Taxes/Fees	of Import	Tax
4401	Fuel wood	4.5	4.5	20	24.5	0
4403	Wood in the rough	4.5	4.5	20	24.5	0
4404	Hoopwood	4.5	4.5	20	24.5	0
4405	Wood wool	4.5	4.5	20	24.5	0
4406	Railroad sleepers	6.5	6.5	20	26.5	0
4407	Sawnwood	8.5	8.5	20	28.5	0
4408	Veener Sheets	8.5	8.5	20	28.5	0
4409	Wood flooring	12.5	12.5	30	42.5	0
4410	Particleboard	12.5	12.5	30	42.5	0
4411	Fiberboard	12.5	12.5	30	42.5	0
4412	Plywood	12.5	12.5	30	42.5	0
4413	Densified wood	12.5	12.5	30	42.5	0
4414	Wooden frames	12.5	12.5	30	42.5	0
4415	Packing cases	12.5	12.5	20	32.5	0
4416	Barrels	12.5	12.5	20	32.5	0
4417	Tools	16.5	16.5	30	46.5	0
4418	Carpentry wood	16.5	16.5	30	46.5	0
4419	Tableware	16.5	16.5	30	46.5	0
4420	Wood marquetry	16.5	16.5	20	36.5	0

4421	Other articles of wood	16.5	16.5	20	36.5	0
4422	n/a	0	0	0	0	0
4423	n/a	0	0	0	0	0
4424	n/a	0	0	0	0	0
4425	n/a	0	0	0	0	0
Pre-fabricated Houses, a subsection under chapter 96		20.5	20.5	30	50.5	0

PS&D Tables

Tropical Hardwood Logs, PS&D Table

PSD Table						
Country	Brazil					
Commodity	Tropical Hardwood Logs				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	0	27,850	0	28,270	0	28835
Imports	0	372	0	180	0	120
TOTAL SUPPLY	0	28222	0	28450	0	28955
Exports	0	236	0	130	0	120
Domestic Consumption	0	27,986	0	28,320	0	28835
TOTAL DISTRIBUTION	0	28222	0	28450	0	28955

Tropical Hardwood Logs, Export Trade Matrix

Export Trade Matrix			
Country	Brazil		
Commodity	Tropical Hardwood Logs		
Time period	Jan-Dec	Units:	cum
Exports for:	1999		2000
U.S.	383	U.S.	0
Others		Others	
European Union	103,330		66,249
Morocco	116,000		166,000
Uruguay	1,100		1,300
Total for Others	220430		233,549
Others not Listed	3,639		2,395
Grand Total	224452		235944

Tropical Hardwood Logs, Import Trade Matrix

Import Trade Matrix			
Country	Brazil		
Commodity	Tropical Hardwood Logs		
Time period	Jan-Dec	Units:	cum
Imports for:	1999		2000
U.S.	0	U.S.	0
Others		Others	
Argentina	86,547		344,354
Bolivia	20,186		9,885
Paraguay	1,552		15,905
Total for Others	108285		370,144
Others not Listed	521		2,075
Grand Total	108806		372219

Tropical Hardwood Lumber, PS&D Table

PSD Table						
Country	Brazil					
Commodity	Tropical Hardwood Lumber				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	0	14,400	0	14,800	0	15,300
Imports	0	157	0	140	0	130
TOTAL SUPPLY	0	14557	0	14940	0	15430
Exports	0	901	0	950	0	1,045
Domestic Consumption	0	13656	0	13,990	0	14,385
TOTAL DISTRIBUTION	0	14557	0	14940	0	15430

Tropical Hardwood Lumber , Export Trade Matrix

Export Trade Matrix			
Country	Brazil		
Commodity	Tropical Hardwood Lumber		
Time period	Jan-Dec	Units:	cum
Exports for:	1999		2000
U.S.	120,265	U.S.	125,769
Others		Others	
Argentina	65,546		56,832
China	11,745		40,415
Dominican Rep	30,759		30,664
European Union	357,174		405,672
Hong Kong	12,629		22,099
Japan	15,003		11,474
Phillipines	45,623		71919
Total for Others	538479		639,075
Others not Listed	165,279		136,201
Grand Total	824023		901045

Tropical Hardwood Lumber, Import Trade Matrix

Import Trade Matrix			
Country	Brazil		
Commodity	Tropical Hardwood Lumber		
Time period	Jan-Dec	Units:	cum
Imports for:	1999		2000
U.S.	305	U.S.	941
Others		Others	
Argentina	182		216
Bolivia	1,118		280
Paraguay	119,915		154,683
Total for Others	121215		155,179
Others not Listed	212		636
Grand Total	121732		156756

Softwood Lumber, PS&D Table

PSD Table						
Country	Brazil					
Commodity	Softwood Lumber				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	0	5,750	0	6,050	0	6,400
Imports	0	0	0	0	0	0
TOTAL SUPPLY	0	5750	0	6050	0	6400
Exports	0	1,295	0	1,360	0	1,430
Domestic Consumption	0	4,455	0	4,690	0	4,970
TOTAL DISTRIBUTION	0	5750	0	6050	0	6400

Softwood Lumber, Export Trade Matrix

Export Trade Matrix			
Country	Brazil		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	cum
Exports for:	1999		2000
U.S.	733,587	U.S.	784,184
Others		Others	
Argentina	29,538		19,373
China	16,549		35,322
European Union	221,900		219,448
Mexico	34,590		68,024
Morocco	109,661		98,314
Uruguay	13,687		31,224
			471705
Total for Others	425925		471705
Others not Listed	48,394		39,003
Grand Total	1207906		1294892

Softwood Plywood, PS&D Table

PSD Table						
Country	Brazil					
Commodity	Softwood Plywood				1000 CUBIC METERS	
	Revised	2000	Preliminary	2001	Forecast	2002
	Old	New	Old	New	Old	New
Market Year Begin		01/2000		01/2000		01/2000
Production	0	800	0	750	0	790
Imports	0	0	0	0	0	0
TOTAL SUPPLY	0	800	0	750	0	790
Exports	0	616	0	550	0	580
Domestic Consumption	0	184	0	200	0	210
TOTAL DISTRIBUTION	0	800	0	750	0	790

Softwood Plywood, Export Trade Matrix

Export Trade Matrix			
Country	Brazil		
Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	cum
Exports for:	1999		2000
U.S.	98,235	U.S.	52,195
Others		Others	
Dominican Rep	14,233		20,423
European Union	381,189		477,191
Total for Others	395422		497614
Others not Listed	50317		65806
Grand Total	543974		615615

December 14, 2001