

CLEARWOOD (PINE) LUMBER, MOULDING & MILLWORK SECTOR

OUTLOOK TO 2008

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R.E. Taylor & Associates Ltd.
FOREST INDUSTRY STRATEGIC SERVICES



**INTERNATIONAL WOOD
MARKETS RESEARCH INC.**

NEW TO THIS EDITION:

RESULTS AND OUTLOOK
OF U.S. INDUSTRY-WIDE
SURVEY ON DISTRIBUTION
CHANNEL DYNAMICS



FEATURING:

- In-depth analysis for senior executives evaluating their corporate business strategies and options in the clearwood sectors
- An overview of global plantation-pine timber and lumber supply-side dynamics
- A review of the strategic implications of domestic vs. off-shore production and where it is consumed in the U.S. market
- A profile of moulding distribution channels and their market shares in various end-use sectors and products
- Five-year forecasts on U.S. supply, consumption and prices

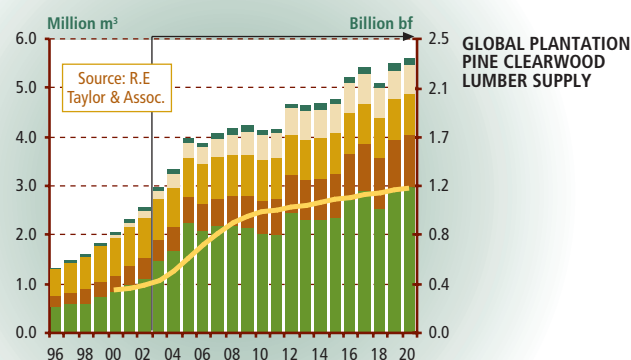
CLEARWOOD (PINE) LUMBER, MOULDING & MILLWORK SECTOR

OUTLOOK TO 2008



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ABOUT THIS REPORT

In today's globally competitive environment, it is essential that companies involved in the U.S. industrial (clearwood) lumber, moulding and millwork sector stay abreast of the changing trends in domestic and offshore supply and resulting downstream market implications. **Clearwood (Pine) Lumber, Moulding & Millwork Sector: Outlook to 2008** is the most comprehensive market analysis available of U.S. end-use segments for appearance-grade clearwood. Now in its third edition, it's a must-read for anyone involved in exports or imports of clear pine lumber, moulding and millwork products who requires an independent outlook on the future of the industry.

Over the last decade, U.S. consumption of moulding and millwork has more than doubled, with imports of raw material and finished products taking an expanding share. With supply exceeding demand, domestic and offshore producers are being forced to redefine their product mix, market segmentation and service functions in order to remain competitive. This report addresses the strategic implications of where all this domestic and offshore production will be consumed and through what channels it will be distributed, and forecasts the market share of U.S. consumption the various segments and products are expected to achieve.

KEY ATTRIBUTES

- Unique, all-encompassing report that presents an overview of the competitiveness of the global plantation-pine timber supply regions, including log and sawmilling costs by major producing country/region.
- Profiles, overviews, major players and trends in U.S. and offshore manufacturing of pine products.
- U.S. market forecasts to 2008 of consumption, supply (domestic and imports) and prices of clear pine lumber, mouldings and millwork.
- **NEW TO THIS EDITION:** Findings of original research conducted by R.E. Taylor & Associates on U.S. moulding and millwork distribution, addressing regional consumption trends, distribution channel trends for mouldings, and expected strategic initiatives by channel players.

QUESTIONS ADDRESSED

- Which plantation-pine regions feature the lowest-cost timber and lumber producers; how is that changing, and how will this impact U.S. markets and suppliers?
- What are the trends in production and exports of logs, lumber, mouldings and other millwork products from established exporting countries and U.S. regions, in comparison to emerging ones?
- How is regional acceptance of moulding changing in terms of species used? What about preferences of paint-grade versus stain-grade, finger-joint versus MDF, primed versus unprimed?
- What shifts in customer mix, product offerings and service functions are channel players considering, and what impact could these changes have on established distribution linkages and/or suppliers?
- What impact will national home centers have on retail moulding and millwork sales, and which channel intermediaries will be most positively and negatively affected?

THE AUTHORS

R. E. TAYLOR & ASSOCIATES LTD.

R.E. Taylor & Associates Ltd. specializes in solid wood products research, analysis and business strategies. The firm conducts projects for the who's who of the global wood products industry on a wide variety of strategic topics, products and markets, including providing benchmarking services. Its associated company, **International Wood Markets Research Inc.** (www.woodmarkets.com) publishes the newsletter *WOOD Markets Monthly* and a number of multi-client studies.

The moulding and millwork sector is one of the cornerstones of R.E. Taylor & Associates Ltd.'s consulting practice. Over the past twelve years, the company has assisted North American and offshore producers, timberland owners and distributors to find their product or market fit in the ever-changing global clearwood industry.

OTHER AVAILABLE OR SOON-TO-BE-RELEASED MULTI-CLIENT REPORTS

Europe & Russia Wood Products Industry: Trends and Outlook

Global Lumber/Sawn Wood Cost Benchmarking Study (2002 Basis)

Global Cost Benchmarking Study of Finger-joint and MDF Moulding Operations (2003 Basis)

WOOD Markets 2004: The Five-Year Solid Wood Products Outlook

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