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Japan

Solid Wood Products

Japanese Glued Laminated Product Imports

Growing Rapidly in 2004 - An Update

2005

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Report Highlights:

Japanese imports of structural glulam wood products grew 13% in 2004, surpassing the previous year's record high levels. Five European countries continue to enjoy a lion's share of these sales and China has grown to be Japan's 3rd largest supplier of structural glulam products after doubling its volume of shipments in 2004

Includes PSD Changes: No
Includes Trade Matrix: No
Unscheduled Report
Tokyo [JA1]
[JA]

Japanese imports of structural glued laminated wood products (glulam), used in most of Japan's wood-framed houses constructed today, achieved an all-time high level of imports in 2004. According to Japanese import statistics, imports of glulam in 2004 totaled 610,897 m³, up 13% from the previous year. The yen-based CIF (i.e. Cost, Insurance and Freight costs combined) value of these imports was 30 billion Yen (US\$0.286 billion), up 7.5% from the previous year.

The combined share of 5 European countries (Austria, Finland, Sweden, Germany, Russia) composed 72% of the total volume of Japanese glulam imports. China is a fairly new but leading supplier of the products to Japan. China's share of the glulam market almost doubled in 2004, due largely to the fast growing production capacity in the country and substantial Japanese investments in manufacturing. At least seven of the newly developed glulam production plants in China are reportedly JAS-certified (Japan Agricultural Standard) and fully capable of supplying products meeting JAS product standards to the Japanese market. China's market share is expected to grow even further in the years ahead despite challenging competitive pressures from European exporters.

The value of U.S. glulam shipments to Japan in 2004 was only 5,376 m³, down 48.2% from the previous year and less than 1% of the total volume imported. Canada's export volume was 26,285 m³, up 11% from the previous year. Due to the continuing strength of the U.S. domestic housing and lumber markets, low prices in the Japanese market and the negative impact of a strong U.S. dollar during the last few years, much of the U.S. industry production was sold domestically in the U.S. at more profitable price levels. The average CIF cost of U.S. glulam imports was at least 42% higher than the world average.

Japanese Imports of Structural Glulam Products in 2004					
Imports From:	Volume (m ³)	% Change ('04/'03)	Value (1000 Yen)	% Change ('04/'03)	Ave. Cost (Yen /m ³) 2004 (2003)
Austria	155,609	+ 9.7%	7,415,105	+ 8.6%	47,652 (48,150)
Finland	135,134	+ 11.8%	6,919,045	+ 7.0%	51,201 (53,515)
China	128,172	+ 99.8%	5,804,275	+ 86.5%	45,285 (48,505)
Sweden	70,868	- 0.7%	3,658,151	- 6.4%	51,619 (54,760)
Germany	55,861	- 16.3%	2,827,125	- 20.3%	50,610 (53,180)
Canada	26,285	+ 11.2%	1,555,134	+ 13.5%	59,164 (57,972)
Russia	23,388	- 6.2%	1,003,188	- 11.6%	42,893 (45,508)
New Zealand	6,910	+ 137.8%	304,537	+ 194.4%	44,072 (35,600)
U.S.A.	5,376	- 48.2%	392,296	- 48.8%	72,972 (73,731)
Brazil	2,232	- 14.8%	79,256	- 8.7%	35,509 (33,158)
Others	1,062	N/A	61,551	N/A	57,958 (N/A)
Total	610,897	+ 13.0%	30,019,663	+ 7.5%	49,140 (51,675)

(Source: Ministry of Treasury: Customs Clearance Statistics)

End of Report