

DIRECTOR'S NOTES:

By Bruce Lippke

As we noted in our last newsletter, there is no shortage of issues facing the forest sector. With the listing of the Northern Spotted Owl as an endangered species, understanding the impact of owl conservation programs has for the moment taken center stage. With the availability of timber a major problem in the Northwest, there will be increased attention to alternative supply sources. A very brief synopsis of a three state impact analysis is included on page 5.

It is noteworthy that the Soviets now have forest managers with the authority to form joint ventures with others and are directly buying processing equipment from the US. Perestroika may result in the use of cash from timber harvests to expand their infrastructure. Tom Waggener and Chuck Backman are involved in a major project to determine the impact of perestroika on Soviet wood supplies. We have included some of their earlier observations as our cover story.

Another focus will be on increased value added processing given the constraints on raw material. Secondary manufacturing is possibly best thought of as many small niche markets. One of those with high potential growth is furniture. Paul Smith has recently returned from his third visit to Taiwan where he met with furniture manufacturers, wood traders, particleboard producers and other industry experts. Accordingly his article on page 6 highlights his findings.

On workshops we were successful in sponsoring the Second International Symposium on Pulp and Paper (see page 2) and are looking forward to a much more focused, but very useful workshop on furniture organized by Paul Smith (page 7).

The ever-elusive statistics on exports will be regularly published again. The US adopted harmonized codes in 1989 resulting in substantial discontinuities in some categories. We now feel safe providing results while recommending caution when looking at historical comparisons below broad categories. Export comparisons for Washington, Oregon and the US are covered on page 6. The *Value of Forest Products Exports From Washington State* report, a joint project with The Evergreen Partnership will also resume publication this month.

SOVIET FORESTS AT THE CROSSROADS

By Chuck Backman

Political, social, and economic changes occurring in the Soviet Union under policies of perestroika and glasnost are creating unprecedented interest, opportunities, and risk for current and potential participants in the Soviet forest products industry. The outcome of the changes is far from clear, not only for the forest products industry, but also for the country as a whole. As the USSR grapples for clear direction along the twin paths towards political pluralism and a decentralized market-driven economy, these changes will continue to create uncertainty as well as opportunity.

The USSR is a major country for forest land, wood volume, and annual growth of the forest. Its share (of world total figures) of stocked forest land is 27 percent, of inventoried volume of wood - 25 percent, and of estimated annual increment - 28 percent. Especially significant is the share of world coniferous forest area (52 percent) and world coniferous volume (57 percent). While the USSR contains significant volume of deciduous species (19.2 billion cubic meters), this represents only 8 percent of the total world volume of deciduous species and 13 percent of the deciduous forest area.

The first reliable data on the entire USSR forest inventory were obtained in 1957, and most recently 1988. The inventory of the USSR has been classified into 5 broad land categories with a number of smaller categories. The smallest classification used to identify stands of timber is the cover type. Indicators used to separate cover types include predominate species composition, forest type, age class, site class, management intensity, stocking, growing stock and merchantability, average heights and diameters, and ownership.

Most of the forest industry activity is concentrated in the Russian Republic (identified as RSFSR) located in the European region of the country. Most of the industrial activity is located in the European region of the country, where 75 percent of the people live. While this part of the country contains only 22 percent of the forest resource, it accounts for a majority of the Russian harvest and the production of lumber, plywood, particleboard, fiberboard, paperboard and paper. Minor production of forest products is carried out in the Ukrainian and Belorussian SSR.

[continues on Page 3]

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INTERNATIONAL SYMPOSIUM ON PULP AND PAPER By Donald F. Root

The last decade of the 20th Century will almost certainly be characterized as one of accelerating globalization. Although individual countries and regions of the globe experience change and react to it in ways that are unique, it is clear that they are becoming increasingly interdependent. Corporations are becoming more and more multinational through expansion, mergers and acquisitions. Trade barriers are falling away. Public policy issues, notably those concerning environment, are having worldwide impact. Democratization is changing social and political patterns in the direction of increased cooperation and accord.

The pulp and paper industry worldwide is clearly a participant and is profoundly affected by these changes. An international perspective is essential today, both in developing long term strategy and in making short term decisions. To compete successfully, industry leaders must have a clear understanding of the issues affecting trade, economics, finance, public policy, technological change, energy and materials.

This was the context for the 2nd International Symposium on Pulp and Paper—“Global Resources and Markets: Issues and Trends.” It was a three day program consisting of six separate but interrelated sessions. The first day dealt with relatively current issues and trends as seen from the unique perspectives of individual countries or regions of the world. Specific situations relating to production capacity, raw material supplies, trade balance, capital formation, environmental and other policy issues were discussed by industry leaders and international experts from these countries and regions.

The second day began with a review of major raw material trends in the world: an update on the rapidly developing use of Eucalyptus for pulp; an analysis of the growing use recycled fiber throughout the world; and a look at the opportunities and issues leading to increased use of inorganic fillers, notably calcium carbonate, in the making of paper. A round table discussion of rapidly developing trading blocs in the world rounded out the morning session. World experts examined the potential effects on the paper industry of EEC-1992 (Europe), the US/Canada Free Trade Agreement and other similar programs in the world.

In the afternoon of the second day, public policy issues were featured. Energy supply concerns, and associated environmental policies on acid rain, global warming and public safety were presented and discussed. Another round table group of experts from Europe and the United States completed the session with a sobering look at several environmental controversies affecting the industry, notably the issue of chlorinated organic compounds in bleach plant effluents and in bleached pulp and paper products.

The third day began with an examination of scientific and technological developments, emphasizing potential future impacts on global cooperation and competitiveness. The final session provided four different perspectives on where globali-

zation of industry is heading. This included an examination of Eastern Europe, where remarkable and rapid changes are taking place today. Other presentations on globalization were given from the points of view of: the industry segment that supplies goods and services to the pulp and paper industry; a company in a different industry with a long and successful history as a multinational corporation; and an economist who covered a number of major economic and financial situations that exist in the world today and which can be expected to affect future developments in the pulp and paper industry.

The symposium was organized and sponsored by CINTRAFOR with assistance from the Washington Pulp and Paper Foundation, Incorporated (WPPF). Valuable cooperation and assistance were given by other major organizations: American Paper Institute, Canadian Pulp and Paper Association, European Paper Institute, Japan Paper Association, Swedish Pulp and Paper Association, TAPPI and PIMA. Editing of the papers presented in the symposium is in progress and published proceedings will be available from CINTRAFOR later this year.

ARRIVALS AND DEPARTURES

Consistent with our efforts to improve our responsiveness we welcome two new staff to CINTRAFOR and the University.

John Perez-Garcia, a recent PhD from Yale, has joined our research faculty and will be working on Pacific Rim and global competitiveness policy issues. With the rapidly changing constraints on timber and pressure on new sources, his experience and contributions will be valuable.

Lu Ann Branch joined us as our program coordinator and will be a major contributor to our workshops, project development, project reporting, and the local expert when faculty are unavailable.

We will miss **W. Ramsay Smith** who left our faculty in August to become the new Director of APEX (Appalachian Hardwood Export Center) at West Virginia University in Morgantown. A positive by-product will be more cooperative efforts between APEX and CINTRAFOR.

We wish good luck to **Slade Gleaton** who left in September to become a Portfolio Analyst with the John Hancock Timber Resource Group in Boston, Massachusetts. As a graduate student, while completing his Masters under Darius Adams, he worked on several CINTRAFOR research projects.

Two of our PhD candidates are gaining additional international experience this fall. **John Chmellik** is working at FAO in Rome, Italy on a waste paper consulting project. **Ivan Eastin** leaves for Ghana in West Africa to work for a year on a tropical hardwood market study as part of his Fulbright Fellowship.

And of equal importance we will soon be welcoming a number of new graduate research assistants for the fall quarter, many with considerable experience in the international forest products sector.



SOVIET FORESTS [Continued from Page 1]

Exports and imports of forest products are only a minor component of general Soviet foreign trade. In 1987, exports of forest products were only 3 percent of total exports by value. Imports of forest products in 1987 were one percent of total Soviet imports. While Soviet total exports have increased, the forest products component has increased at a slower rate. Between 1977 and 1987, total Soviet exports grew by 106 percent while forest products exports grew by only 29 percent. The same is true for imports. While Soviet imports grew by 102 percent, forest product imports grew by only 35 percent.

Exports are characterized by low value-added products, such as logs and lumber. While the percentage share of these commodities has been declining since 1977 (when combined, they represented more than 70 percent of the forest product exports by value), they still represented a major proportion in 1987 (57 percent) of total forest product exports.

During the same period, the share of higher value-added products has been steadily increasing. Export share of pulp, paper, and paperboard increased from 21 percent in 1977 to more than 30 percent in 1987.

The trend in higher value-added imports is opposite to the trend in forest product exports. The share of manufactured fiber products (pulp, paper, paperboard, and industrial paper) remained relatively constant between 1977 and 1987. In 1977, these four products represented 81 percent of imports. In 1987, these products represented 86 percent of the total forest product imports.

Opportunities may exist for firms interested in forming joint-ventures with domestic firms in order to modernize Soviet manufacturing facilities. Joint ventures serve to gain access to the Soviet domestic market. Such enterprises will facilitate a guaranteed supply source in the face of tighter internal demands within the Soviet Union for established importers of Russian forest products.

By modernizing mills, improved utilization of the timber input is achieved. Thus, the increased output can be directed to internal domestic markets without impeding the flow of products to the foreign importer/partner.

Four general impediments to investing in the USSR are:

- No central repository exists for information about potential business partners resident in the USSR.
- Unclear bureaucratic responsibilities which are leading to fragmented relationships with suppliers and a deteriorating international credit rating.
- Unclear regulations governing the export of products from the USSR place added uncertainty on whether a foreign firm can repatriate its returns on investment in hard currency.
- The Soviet culture has, at this point, only a very limited understanding of the basic Western business concepts of profit, loss, depreciation, or marketing, which in turn makes international communication and decision-making by joint management very difficult, if not perilous.

Near-Term Outlook

The Soviet Union, together with the forestry sector, is in a continuing state of flux. The outcomes of perestroika and glasnost are far from certain. However, it is clear that the future will not be "business as usual" within the forestry sector, and that fundamental relationships of harvesting, production, distribution, consumption, and international trade will all be significantly affected. The following points reflect the near-term prospects for this sector.

1. The Soviet Union, from a forest sector viewpoint, will increasingly be segregated into two distinct geographic regions. First, the European region, lying west of the Ural [continues on Page 4]

mountains, is where the majority of the population, consumption, and forest products manufacturing facilities are situated. Second, an Asian region, lying east of the Yenisey River, has a low population, very limited manufacturing capacity and infrastructure, but has more abundant forest resources. Lying between the two, immediately east of the Ural mountains, is a transition region called West Siberia. Development in the Asian region will be driven by cultivating potential export markets in the Pacific basin, while development in the European region will be driven by greater internal consumption and increasingly limited timber resources.

2. There will be a greater emphasis on developing the forest resource within the European region of the country. This will result in increasing emphasis on development of products which utilize low quality wood material (hardwood and softwood) and waste material from other manufacturing processes (lumber and plywood manufacturing). This will lead to increasing capacity for production of fiberboard, particleboard, pulp, paper, and paperboard.

3. In order to minimize transportation costs of the excess roundwood resource in the Asian region of the country, an increase of manufacturing capacity throughout the country is expected. This will result in the amount of roundwood currently imported to the European USSR from the Asian region declining in preference for more of the European resource. In the short term, this will mean that there will be a higher volume of roundwood available for export to Pacific Rim markets from the Asian region.

4. In the long-term, the roundwood harvest level will not increase at the same rate as the growth in manufacturing capacity. The lower levels of growth will be compensated for by more efficient utilization of the forest resource rather than higher harvests. Thus, the overall increase in harvest can be expected to be negated.

5. There will be a shift away from an emphasis on the export of logs and lumber, in favor of higher value products. While there is still a need to generate hard currency to compensate for the import of equipment and higher priced value-added products (which the USSR cannot itself produce at this time), the same level of foreign exchange can potentially be earned with a lower roundwood equivalent if the wood is manufactured into pulp, paper, fiberboard or other higher value products.

6. Exports of forest products will increasingly be shifted away from countries which do not trade in hard currency. This applies to the Council for Mutual Economic Assistance (CMEA) countries which have to date not traded with the USSR for goods and services in hard currencies. Should the CMEA countries move toward free, multidirectional trade and not limit trade only to the USSR, as has been the case to date, then this shift (away from non-market economies) will potentially decline.

7. Western Europe will be the main source for forest product imports into the European part of the Soviet Union. Opportunities for the sale of manufacturing machinery into the Asian part of the country will also be available for firms based in Japan and North America.

8. Joint venture opportunities will continue to emerge in the more efficient utilization of forest resources. This will take two directions, likely incorporated within a single joint venture. The Western partner will be expected to provide the technology and management assistance for a more intensive and rational utilization of the resource. Second, the Western partner will also need to provide marketing expertise. This is an alternative to relying on the marketing services available through Exports [the major Soviet marketing organization for forest products]. Further, export marketing of products will likely substitute for the repatriation of profits, due to the non-convertibility of the ruble.

9. Increasing consumption within the Soviet Union can be expected in light of moves to restructure the economy, promote economic development, and improve the standard of living for the Soviet citizens. As levels of per-capita consumption increase, there will be added pressures on the efficient utilization of the Soviet timber resource, and this may well provide opportunities for niche marketing of forest products from other supplier countries. Increased domestic consumption may additionally limit the potential and incentives for wood product exports in favor of domestic utilization. Export flows to traditional customers in Eastern Europe may well decline in the future due to both increased Soviet consumption and declining supplies in the Soviet European region.

10. Doing business in the Soviet Union will remain difficult, expensive, time consuming, and bureaucratic. In the near term, lines of responsibility will remain confused, the infrastructure will be limited, and risk will remain high.

FOR ADDITIONAL INFORMATION:

SOVIET FORESTS AT THE CROSSROADS: EMERGING TRENDS AT A TIME OF ECONOMIC AND POLITICAL REFORM

BY

CHARLES H. BACKMAN and THOMAS R. WAGGENER

CINTRAFOR WORKING PAPER #28
382 pp.

\$10.00 (see last page for ordering information)

A new, comprehensive updated review of the Soviet forestry sector, the forest products industry, and international trade in forest products utilizing the most recent Soviet sources and international materials.

THE TAIWAN FURNITURE INDUSTRY

By Paul Smith

Taiwan exemplifies Asian wood furniture manufacturing countries. A combination of an industrious, well-educated workforce, a stable political environment with a well developed infrastructure and state of the art flexible manufacturing techniques have helped propel this small island nation to become the largest source of wood furniture imports for the US. In 1988 Taiwan exported \$1.1 billion worth of household furniture to the US market. Taiwan furniture exports that year consisted of 55 percent wood, 6 percent rattan and 39 percent other non-wood materials. In the US, Taiwan has earned the image of a low cost/high quality producer of low to mid-priced furniture. However, according to Taiwan Furniture Manufacturers Association [TFMA] Vice Secretary General Mou-Hsiung Tsou, other Asian manufacturers such as Malaysia, Thailand, South Korea and the Philippines, will dominate the low-priced furniture market in the future due to labor availability and labor cost.

An increasing domestic demand is being influenced by an emerging affluent segment of young, upwardly mobile, two-income urban professional households. These Taiwan "Yuppies" are increasingly buying domestic and imported home furnishings which has created a subtle shift in the production and distribution of furniture in Taiwan. Moreover, the demand for US styles of upholstered furniture is climbing. In the past, US upholstered producers have been protected by natural comparative advantages such as difficult and expensive transportation costs, high risk of damage during overseas shipping and the need for short turn-around times on customer-ordered goods. As a result, Taiwan has not developed this industry and now relies on imported upholstered goods to supply the growing domestic appetite for these products.

Taiwan's Raw Material Usage For Furniture

Based on interviews conducted with 20 industry experts during a visit to Taiwan June 3, 1990 thru June 14, 1990, approximately two-thirds of the solid wood used by major wood furniture exporters in Taiwan is Rubberwood (*Hevea braziliensis*). An additional one-fourth is Ramin (*Gonystylus bancanus*) and the remainder consists of US imports — primarily oak — and other Southeast Asian hardwoods.

In terms of panel products, North American particleboard and Medium Density Fiberboard [MDF] products enjoy strong competitive advantage in the form of favorable exchange rates, low transportation costs, a reputation for adequate quality and the political need to balance trade accounts. A tariff of 3.75% is currently charged on imported particleboard and MDF products.

In 1989, Taiwan particleboard imports amounted to about 93,000 m³ or about 50% of consumption. Three firms in Taiwan currently produce particleboard and generally attempt to develop market niches which do not directly compete with imports due to problems with quality and relatively high costs. In terms of MDF, there is currently no production in Taiwan

and, therefore, 100% of the 182,600 m³ reportedly consumed in Taiwan in 1989 was imported.

Competitive Factors

One principal advantage Taiwan enjoys over US wood furniture manufacturers is lower wage rates. Government-subsidized interest rates for export production, duty free raw material imports and low environmental and worker safety regulations contribute to additional cost advantages for Taiwan. On the debit side of the ledger, Taiwan must import nearly all furniture raw materials including solid wood, particleboard, Medium Density Fiberboard (MDF), veneers, hardware, glue and finishing chemicals, principally from the US, Indonesia, and peninsular Malaysia, traditional raw material suppliers, have recently enacted strict export restrictions on logs and lumber. In 1984, the largest southeast Asian raw material suppliers were Singapore, Thailand and Malaysia, with exports to Taiwan of approximately \$400 million (\$US). Thus far, Taiwan has successfully integrated rubberwood from Malaysia and Thailand into its products as a substitute for US hardwood species. Finishing technology has further allowed for the imitation of American oak by rubberwood. However, due to increasing pressure to restrict lumber exports by the governments of Thailand and Malaysia in order to encourage their own domestic furniture industries, this source of solid wood is in jeopardy.

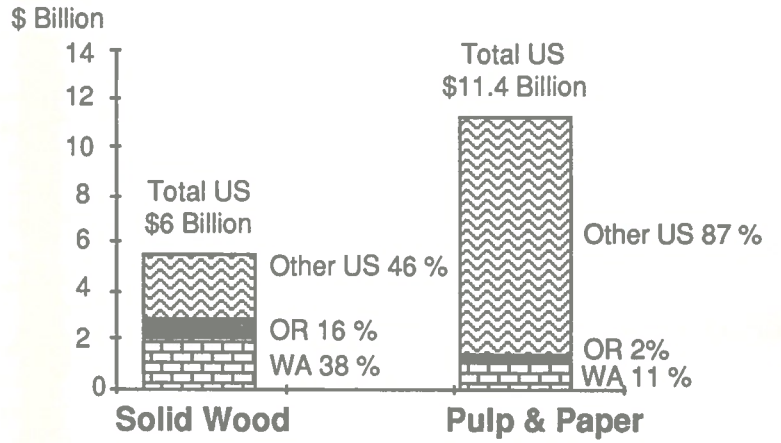
Several challenges must be met by the Taiwan furniture industry if it is to remain competitive in the global marketplace. In a labor intensive industry, such as furniture, wages as well as the availability of skilled workers represent a permanent concern. In the past, this has been considered an advantage of the Taiwan industry. However, this particular advantage has weakened in recent years relative to other emerging Asian furniture industries. As a result many Taiwanese firms are operating well below capacity due to labor shortages. Those factory workers that are available are demanding higher wages and better working conditions, which in turn increases production costs. Labor disputes and strikes are increasing in occurrence. In addition, the U.S./ Taiwan dollar exchange rate has dramatically affected margins, particularly for medium-sized exporting firms who typically sell OEM (Original Equipment Manufacturing) to U.S. manufacturers. In 1985, the exchange rate was about 1:40 \$U.S. to \$N.T. In 1988 the \$N.T. has appreciated to approximately 1:28 and by mid 1989 to 1:25.5.

In order to meet these challenges, the resilient Taiwanese furniture industry is becoming more specialized and is capitalizing on a highly skilled and motivated workforce and sophisticated manufacturing and finishing techniques to upgrade product quality. Labor intensive "parts" are increasingly being manufactured overseas in countries possessing cheap, abundant labor, before being shipped back to Taiwan for finishing, packaging and shipping.

TOTAL US FOREST PRODUCTS EXPORTS

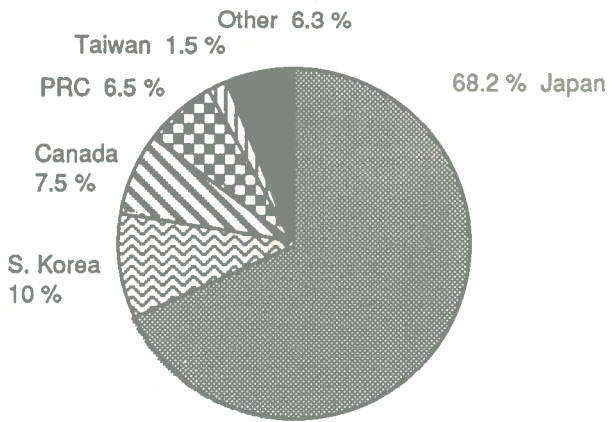
17.4 BILLION DOLLARS

OVERVIEW OF 1989 EXPORT STATISTICS



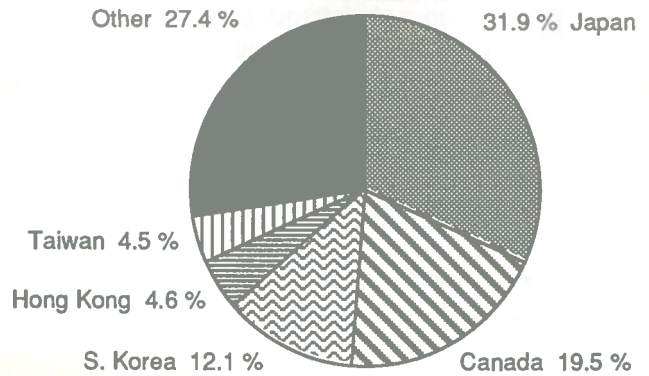
WASHINGTON SOLID WOOD EXPORTS

2.3 BILLION DOLLARS



WASHINGTON PULP & PAPER EXPORTS

1.3 BILLION DOLLARS



(In Million Dollars)	EXPORTS FROM OREGON PORTS	EXPORTS FROM WASHINGTON PORTS
SOLID WOOD	988	2,259
PULP & PAPER	218	1,264
TOTAL	1,206	3,523

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