

C I N T R A F O R

Working Paper 48

[Back to Publications List](#)

The US Millwork Industry: Historical Trends Based on US Department of Commerce Statistics

David G. Briggs, Lee Bialoznski and Steve Shook. 1994

Executive Summary

According to U.S. Department of Commerce census data:

- The millwork industry consisted of 2782 establishments in 1987 which produced millwork as the principal business.
- The millwork industry is dominated by small establishments; 69% had fewer than 20 employees and only 65 had more than 100 employees.
- Between 1987 and 1991;
 - Total employment varied between 85,000 and 91,000; about 72% were production workers.
 - Value of shipments varied between \$9.0 and \$9.7 billion, making millwork the largest of what are commonly called the secondary solid wood product industries. Of the 95% of these shipments which were millwork products,

doors	39%
windows	27%
mouldings	12%
other	<u>29%</u>
	100%
 - Total cost of materials, labor, energy, contracts, etc., varied from \$7.1 to \$7.7 billion, of which

materials	70%
production and non-production workers	25%
energy, contracts and additional expenses	<u>5%</u>
	100%
 - Of the expenditures for materials, 43% was for wood materials, of which

lumber	87%
softwood	72%,
hardwood	15%
hardwood veneer	6%,
plywood	4%
softwood	1%
hardwood	3%
particleboard	2%,
medium density fiberboard	<u>1%</u>
	100%
 - Value-added by manufacturing varied between \$3.7 and \$3.9 billion
- The principal markets for millwork products are:

new private construction	48%
repair and remodel	47%
public construction	3%
prefabricated housing	<u>2%</u>
	100%

According to U.S. Department of Commerce trade statistics for 1989-1992; Exports as a percent of value of shipments have grown from 1.1% in 1989 to 2.4% in 1991:

- In nominal dollars, comparison of 1989 and 1992 trade data shows that U.S. millwork exports grew from \$102 to \$272 million while imports declined from \$310 to \$306 million. The trade deficit in these products declined from \$208 to \$34 million.
- The composition of exports is (Table 31):

	<u>% of 4-year total</u>	<u>Trend</u>
doors and components	44.6	increasing
softwood moldings	28.3	increasing
windows and frames	18.1	decreasing
hardwood moldings	7.0	decreasing
blinds, shutters & other	<u>2.1</u>	decreasing
	100%	

- Export trade for all products is dominated by Canada and Mexico. Other important markets for specific products are the Pacific Rim (mainly Japan), Europe, and the Caribbean countries.
- The composition of imports is (Table 31)

	<u>% of 4-year total</u>	<u>Trend</u>
softwood moldings	41.4	increasing
doors and components	27.2	stable
hardwood molding	19.4	decreasing
windows and frames	6.7	increasing
blinds, shutters, & other	<u>5.2</u>	decreasing
	100%	

- Imports were also dominated by Canada and Mexico, but other regions were important sources of specific products. South America (Chile, Brazil) and the Pacific Rim (New Zealand) are important sources of softwood moldings. Both Chile and New Zealand have large plantations of radiata pine and are promoting this species for millwork. The Pacific Rim (Malaysia and Indonesia) is an important source of hardwood moldings. South America and the Pacific Rim are large suppliers of doors and components. The European Community was an important source of millwork in 1989 but its share sharply declined by 1992.

Washington Customs District has an important role in millwork trade:

- Exports through the District increased from \$18 to \$64 million between 1989 and 1992
- Over 1989-1992, the District accounted for 22.8% of all US millwork exports.
- The District represents 42.2% of US exports of softwood moldings, 16.8% of door and components, 13.6% of windows and frames, and 13.0% of hardwood moldings.
- No information is available to isolate exports manufactured by millwork establishments located within the State of Washington.
- Imports through the District declined from \$30 to 25million between 1989 and 1992.
- Over 1989-1992, the District accounted for 9.0% of all US millwork imports.
- The District represents 14.8% of US imports of doors and components, 10.6% of hardwood moldings, 6.6% of softwood moldings, and 2.5% of windows and frames.

Full Report \$20.00: [To Ordering Instructions](#)

Back to [Publications List](#)