

## U.S. Structural Building Components — Import/Export<sup>i</sup>

Table 4-2

U.S. wood structural building components: Estimated shipments, exports, imports, apparent consumption, and import penetration, 1997-2002

Year	Shipments <sup>1</sup>	Exports <sup>2</sup>	Imports <sup>3</sup>	Apparent consumption	Import penetration
	<i>Million dollars</i>				
1997	5,044	247	169	4,966	3.4
1998	5,701	207	252	5,746	4.4
1999	6,323	189	456	6,590	6.9
2000	6,357	191	395	6,561	6.0
2001	6,316	149	380	6,548	5.8
2002	6,908	116	394	7,186	5.5

<sup>1</sup> 1997 to 2001 shipments are the sum of U.S. Census Bureau, Annual Survey of Manufactures shipments for NAICS no's. 321213 - engineered wood members (except trusses), 321214 - wood trusses, and 3219921 - components of prefabricated stationary wood buildings (not sold as complete units). 2002 shipments are USITC estimates. NAICS no. 321213 includes some products (e.g., finger-jointed lumber) that are not in the scope of this investigation. Annual Survey of Manufactures shipments do not include freight and are, therefore, less than the production figures reported in Chapter 3 of this report.

<sup>2</sup> Exports include Schedule B subheading 4418.90, which potentially includes products outside the scope of this investigation.

<sup>3</sup> Commission estimates.

Source: U.S. Department of Commerce, Census Bureau data.

1. **U.S. imports of wood structural building components increased irregularly from \$169.2 million in 1997 to \$394.3 million in 2002. Canada was the principal supplier of these components during the period.**
2. **The ratio of total U.S. imports to U.S. consumption increased from 3.4% in 1997 to 5.5% in 2002. The United States accounts for over 90% of Canadian exports of wood structural building components.**
3. U.S. exports of wood structural building components declined from \$247 million in 1997 to \$116 million in 2002. Loss of the Japanese glulam market to European competition was a significant factor in this decrease.
4. U.S. exports in 2002 were 53% below the 1997 peak. Japan and Canada were the major markets for U.S. exports and other major export markets include the Bahamas, Australia, Korea, and the United Kingdom.
5. **U.S. and Canadian industry representatives allege that two-tiered pricing exists in the North American market for softwood lumber, that the Canadian price advantage was larger during the U.S./Canada Softwood Lumber Agreement (SLA) than in 2002, that two-tiered pricing remains in place since the imposition of U.S. antidumping and countervailing duties, and that border State truss manufacturers experience the largest competitive disadvantage because of any two-tiered price system.**

<sup>i</sup> All facts taken directly from the U.S. International Trade Commission Publication 3596 entitled "Conditions of Competition in the U.S. Market for Wood Structural Building Components" from ITC Investigation No. 332-445 April 2003. U.S. International Trade Commission, Washington, DC 20436, [www.usitc.gov](http://www.usitc.gov)