U.S. Structural Building Components — Market Size and Employment[i]

Market Size Facts

Table 3-1
U.S. wood structural building components: Estimated production, 1997-2002

Items	1997	1998	1999	2000	2001	2002[1]
	Million dollars					
Trusses and prefabricated panels	6,006	6,528	7,544	7,822	8,487	8,953
Engineered wood products	1,540	1,618	1,855	1,842	1,785	1,767
Total	7,546	8,146	9,399	9,664	10,272	10,720

[1] 2002 data estimated from 6 month YTD data.

Source: Compiled from data submitted in response to Commission producer questionnaires.

1. Shipments of the **U.S. wood products industry totaled about $80 billion in 2001.** Manufactured products, in this industry, are varied and include lumber, wood structural building components, panel products (e.g., OSB, plywood, etc.), millwork (e.g., windows, doors, flooring, etc.), and wood containers and pallets. In recent years, shipments of wood structural building components (about 7.5% of the total) have accounted for a growing part of this mix.
2. Driven by strong construction markets during 1997-2002, production of **wood structural building components** increased in value at an average compound annual rate of 8.0% to $10.3 billion in 2001 and **is likely to reach $10.7 billion in 2002.**
3. During 1997-2002, production of trusses and prefabricated panels increased steadily at an estimated average compound annual rate of 9.0% Trusses and prefabricated panels represented 80% of total production of wood structural building components in 1997, but increased to 84% in 2001 as a result of strong growth relative to EWP.
4. During 1997-2002, roof trusses accounted for most production reported by truss manufacturers. Floor trusses accounted for 9%, and wall and floor panels increased from 5% to 11%.
5. **EWP has exhibited strong growth since 1990**, although the value of EWP production exhibited more moderate growth compared with truss growth. The average compound annual growth rate was 3.8 percent during the period; production increased from $1.5 billion in 1997 to $1.9 billion in 1999 but decreased slightly to $1.8 billion in 2001.
6. I-joists accounted for approximately 50% of U.S. EWP production. Laminated veneer lumber (LVL) accounted for 20-29%, and glulam accounted for 26-34% of the total value of EWP production.

Employment Facts

Table 3-3
U.S. wood structural building components: Employment, 1997-2001

Items	1997	1998	1999	2000	2001
	Number of employees				
Truss manufacturing:[1]					
All employees	32,069	34,661	37,649	38,597	39,307
Production workers	24,266	26,401	28,856	29,276	29,634
Engineered wood products:[2]					
All employees	5,372	5,811	5,884	5,709	5,724
Production workers	4,469	4,869	5,049	4,844	4,932

[1] Employment data for truss manufacturing, NAICS code 321214.
[2] Employment data for engineered wood members, NAICS code 321213, which includes some products not in the scope of this investigation.

Source: U.S. Census Bureau Annual Survey of Manufactures, M019(AS)-1.

1. The total number of people employed (truss) increased an average compound annual rate of 5.2% to 39,307 in 2001.

[i] 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