

**MARKETS FOR SOLID WOOD PRODUCTS MANUFACTURED
BY MEMBERS OF THE CHILOE MODEL FOREST**

Submitted to:

**International Model Forest Network Secretariat
Ottawa, Canada**

and

**Chiloé Model Forest
Santiago, Chile**

By:

David Cartwright, MF, RPF
Vancouver, Canada

December 1999

Table of Contents

| | Page |
|-----------------------------------------------|-----------|
| 1. - INTRODUCTION | 3 |
| 2. - EXPORTABLE SOLID WOOD PRODUCTS | 3 |
| 3. - SELECT OFFSHORE MARKETS | 4 |
| 3.1 US market for wood products | 4 |
| 3.2 US wood product imports | 5 |
| 3.3 US wood imports by product category | 5 |
| 3.3.1 Softwood imports | 5 |
| 3.3.2 Hardwood imports | 5 |
| 3.3.2.1 Lumber | 6 |
| 3.3.2.2 Plywood | 6 |
| 3.3.2.3 Other hardwood products | 6 |
| 3.3.3 Specialty product imports | 6 |
| 3.3.3.1 Millwork products | 6 |
| 3.3.3.2 Doors | 7 |
| 3.3.3.3 Windows | 7 |
| 3.3.3.4 Flooring | 8 |
| 3.3.3.5 Mouldings | 8 |
| 3.3.3.6 Components and products | 8 |
| 3.3.3.7 Furniture | 9 |
| 4. - MARKET DEVELOPMENT CONSIDERATIONS | 10 |
| 5. - CONCLUSIONS | 11 |
| APPENDIX 1 KEY CONTACTS | 12 |
| APPENDIX 2 IHPA VENEER SPECIFICATIONS | 23 |

1. - INTRODUCTION

An ambitious development program has been defined for the Bosque Modelo Chiloé. Two of the projects currently underway include the harvesting and marketing of avellana seeds and the production and retail marketing of charcoal. These are important programs that provide benefits in the immediate term to participants. However, since these projects are already underway they have not been specifically included in the proposed Industrial Development Program.

The Chiloé Model Forest's management has the opportunity to develop in-house expertise and knowledge about the technology best suited for the industrial processing of the industrial wood available from its forests. This knowledge can, in the immediate future, be used to justify and attract new investment in the forest-processing sector of the island. However, to attract investment there has to be specific and accurate information available on the existing and future industrial forest resources, their location and availability.

After an evaluation of the Bosque Modelo Chiloé's resources and an exhaustive review of existing conditions on the Island, it appears that the best opportunity for industrial development lies with the second growth canelo and tepa stands. However, much work has to be done before these can become a steady, reliable source of industrial wood.¹

There is insufficient information available on the Model Forest resources. This information should be researched, collected and analysed.

There is a lack of information on technologies suited to processing the resources that will be available from second growth forests. There should be a program to collect, evaluate and field-test the more promising technologies.

There is insufficient information on existing markets. Information should be collected on the more promising markets and, especially, the conditions that suppliers have to meet in each market. The objective of this market research should be the identification of the most promising products to manufacture from the resources that are available on the Island.

While management is undertaking the preparatory work required in support of the investment in new plant facilities, all possible efforts should be made to assist established members to maximise the production of value added wood products targeting markets that offer the highest profitability.



For further information please contact the author, Mr. David Cartwright, at david.cartwright@gryphonresources.com