



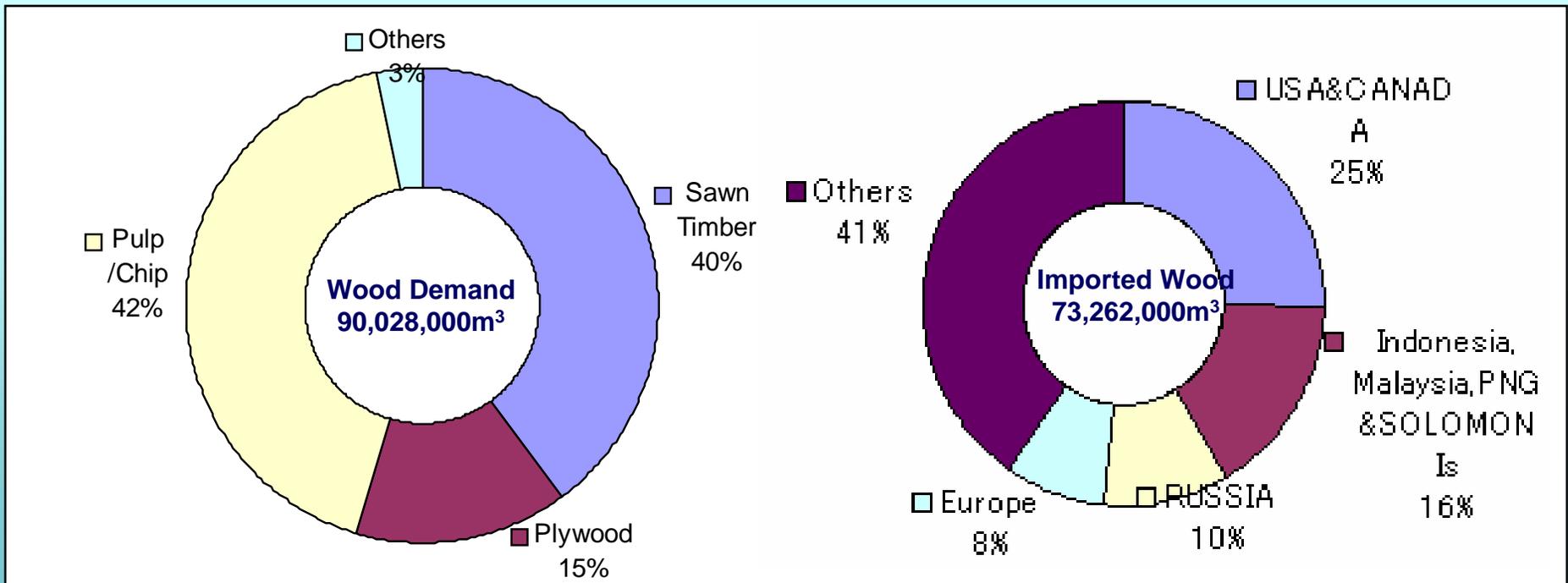
PLYWOOD INDUSTRY IN JAPAN



**Japan Plywood Manufacturers' Association
(ITTO/FAO,ICTP)**

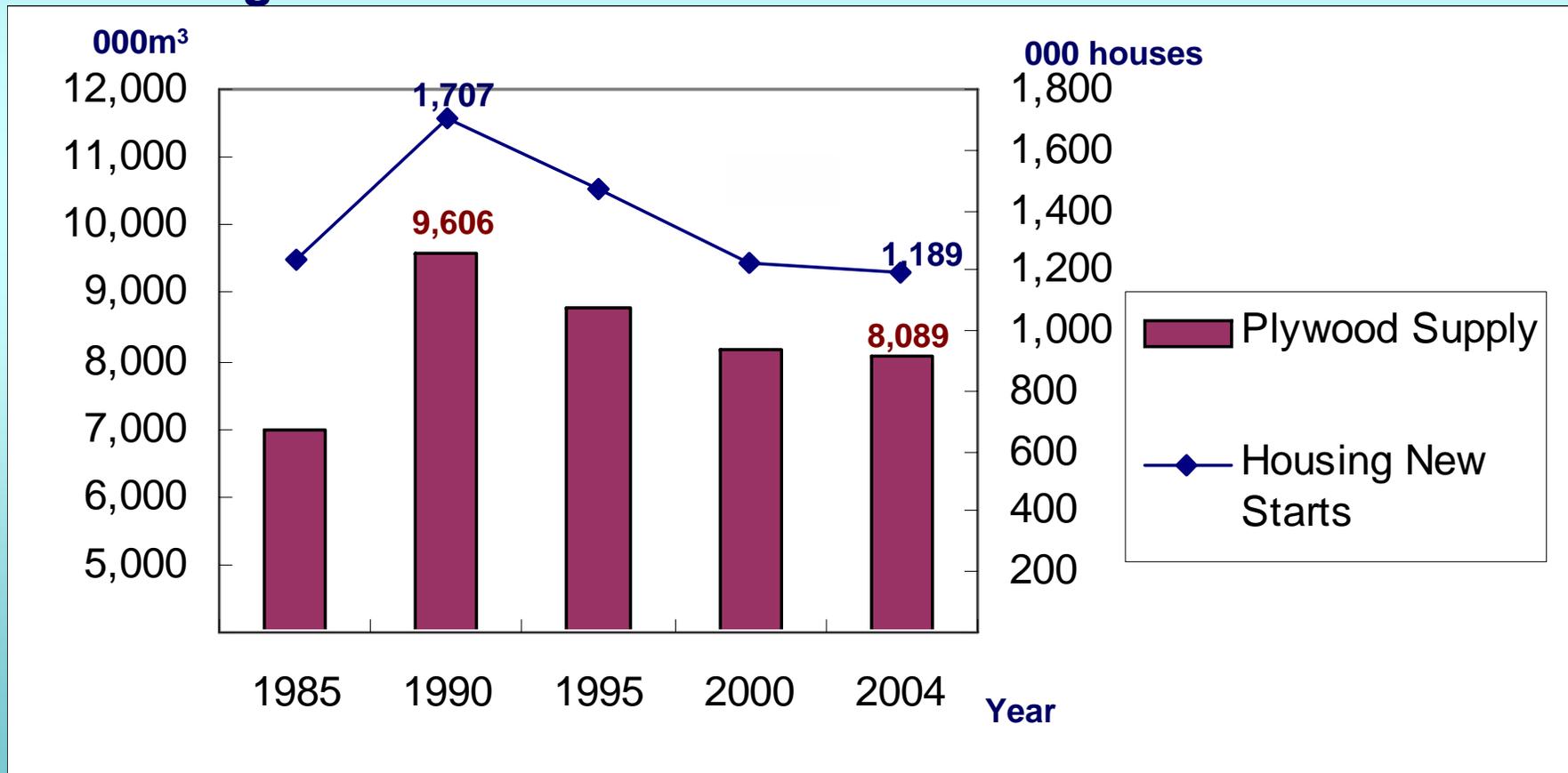
Situation of Wood Supply and Demand in Japan

- Total wood demand in 2004 : 90,028.000m³ (log equivalent)
- Breakdown : 40% for sawn timber, 15% for plywood, 42% for pulp/chip and 3% for others
- Supply : domestic wood 19%, 16,766.000m³, imported wood 81%, 73,262 .000m³
- Breakdown of imported wood : USA&CANADA 25%, Indonesia,Malaysia,PNG&SOLOMON Is 16% , RUSSIA 10%, Europe 8 % and Others 41 %



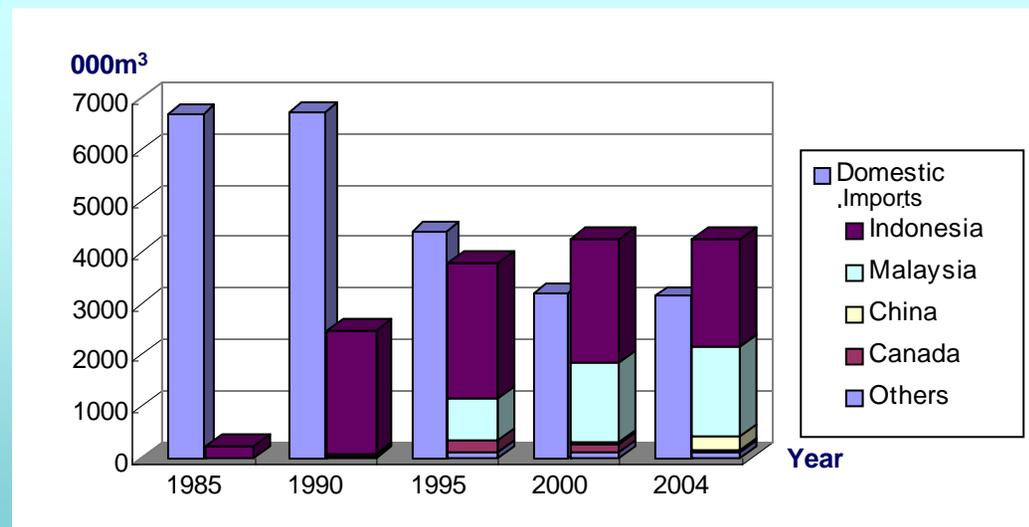
Plywood Supply and Housing New Starts

- Some 90% of the plywood supply is used in the housing sector
- The plywood supply is falling due to the decrease of housing new starts



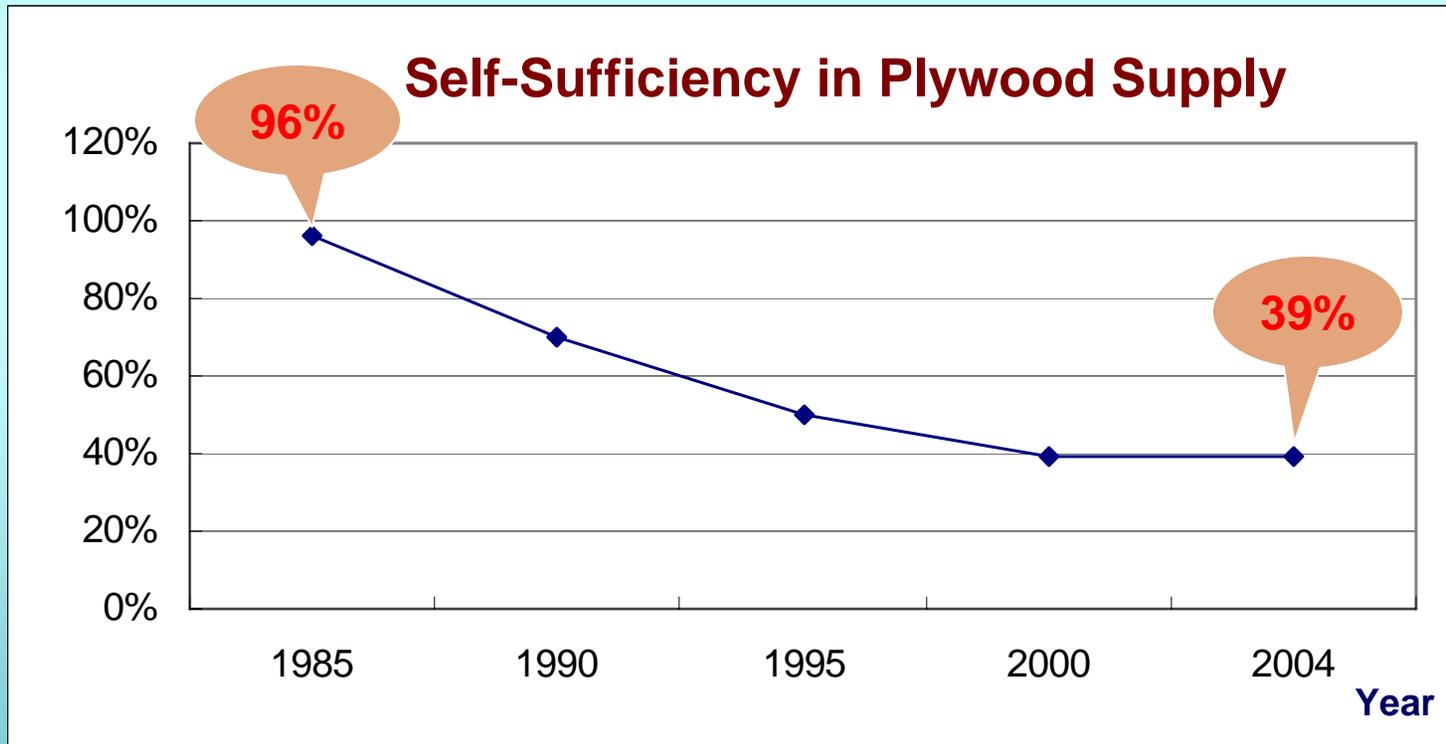
Breakdown of Plywood Supply (by Country)

- The supply of imported plywood in 2004 was 17 times higher than the level recorded in 1985
- The supply of domestic plywood in 2004 showed a 53% fall compared to the level recorded in 1985



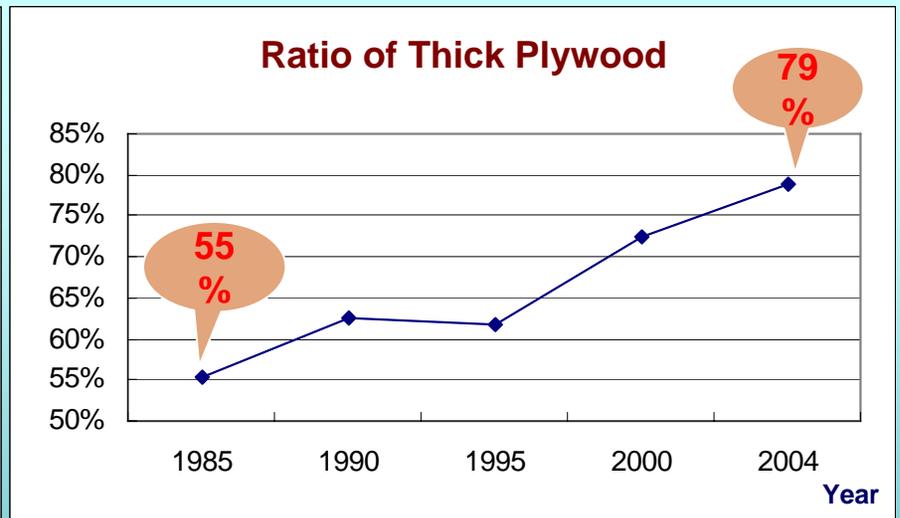
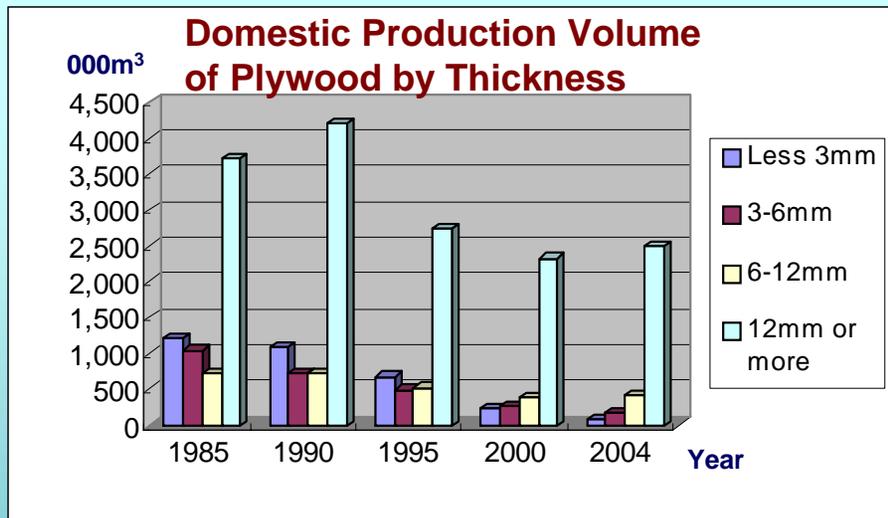
Self-Sufficiency in Plywood Supply

- **Self-Sufficiency(%) = Domestic Supply ÷ Total Supply × 100**
- **The self-sufficiency declined from 96% in 1985 to 39% in 2004**



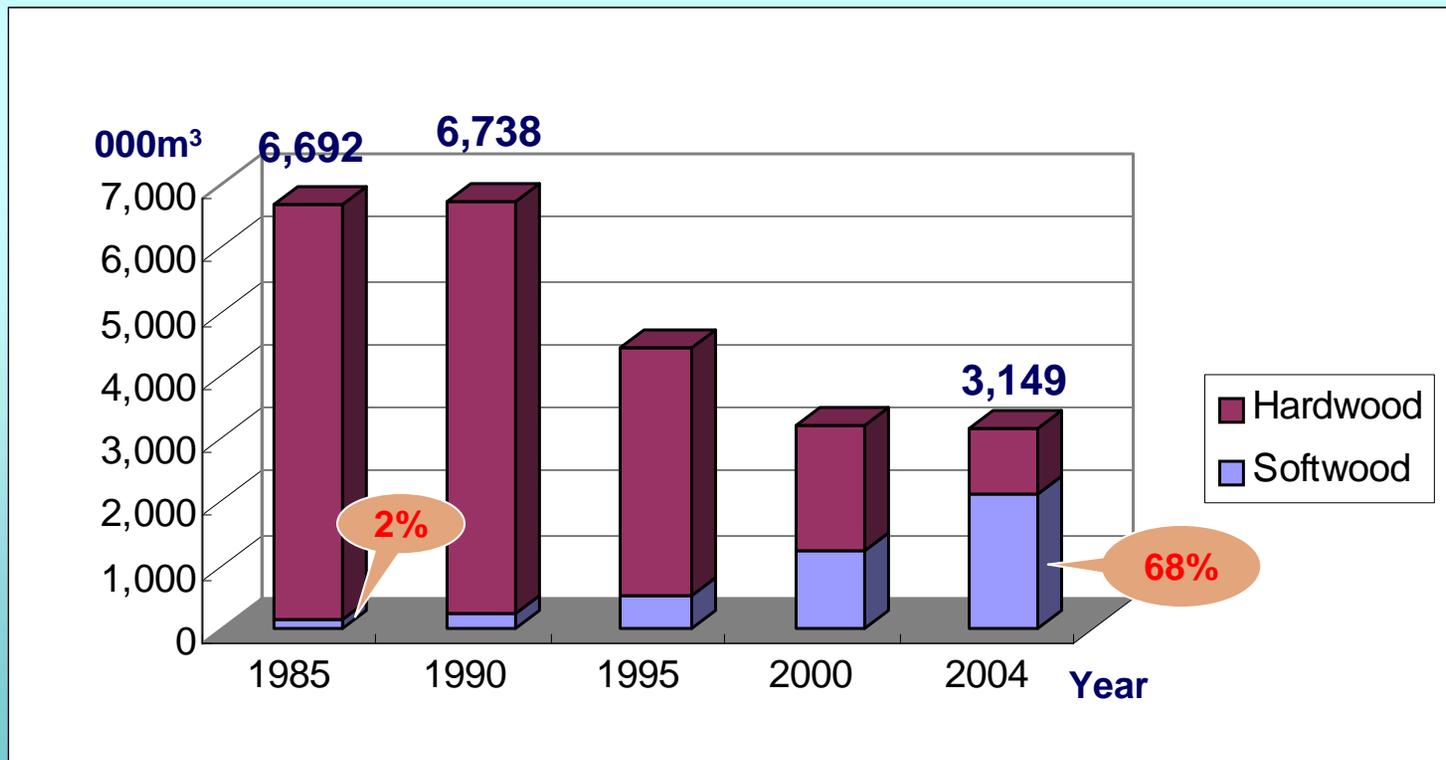
Domestic Plywood Production by Thickness

- Increased production ratio of thick plywood
- Thick plywood of 12 mm or more in domestic production ratio from 55% in 1985 to 79% in 2004



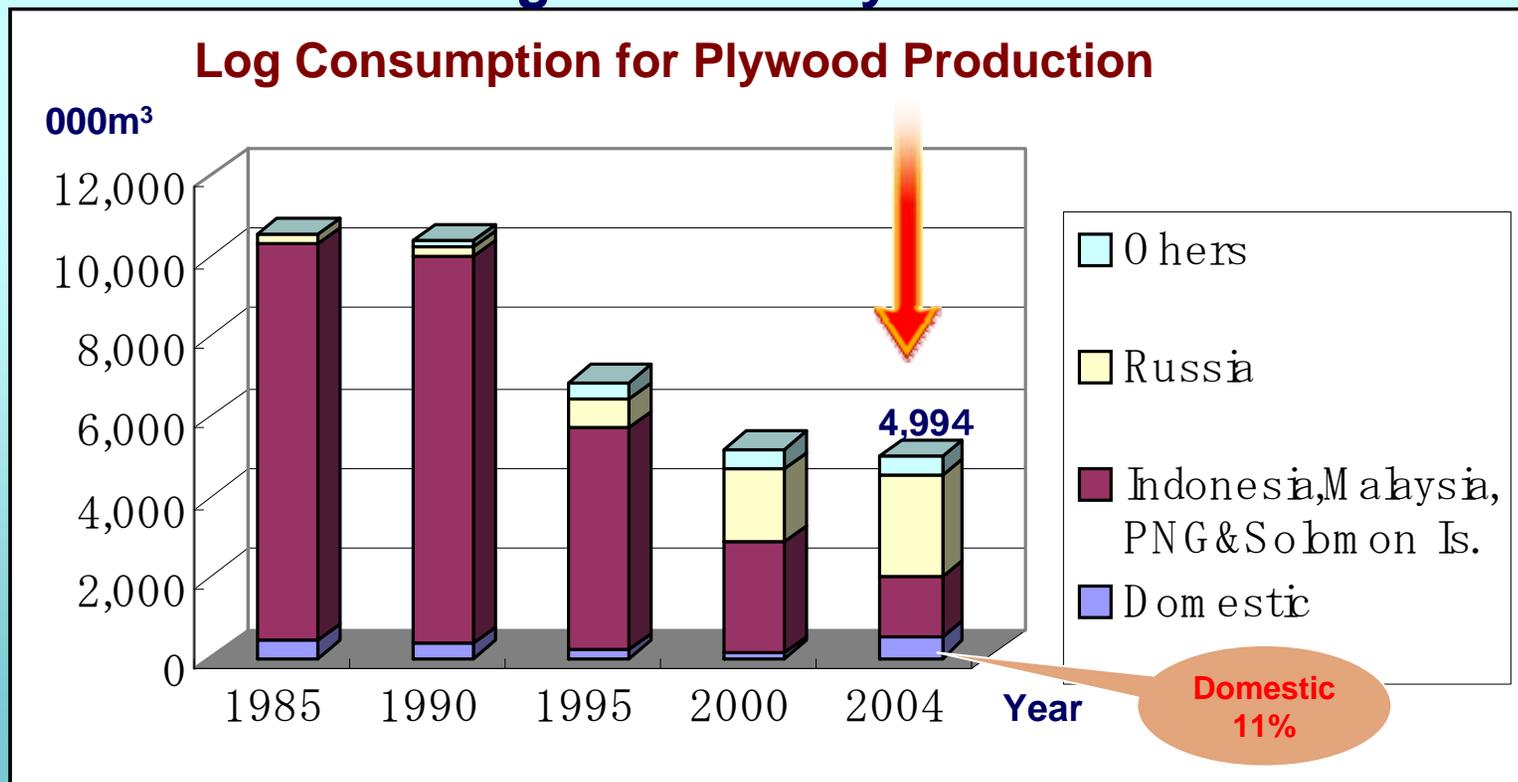
Domestic Plywood Production by Softwood and Hardwood

- Increased production of softwood plywood
- Softwood plywood in domestic production ratio from 2% in 1985 to 68% in 2004



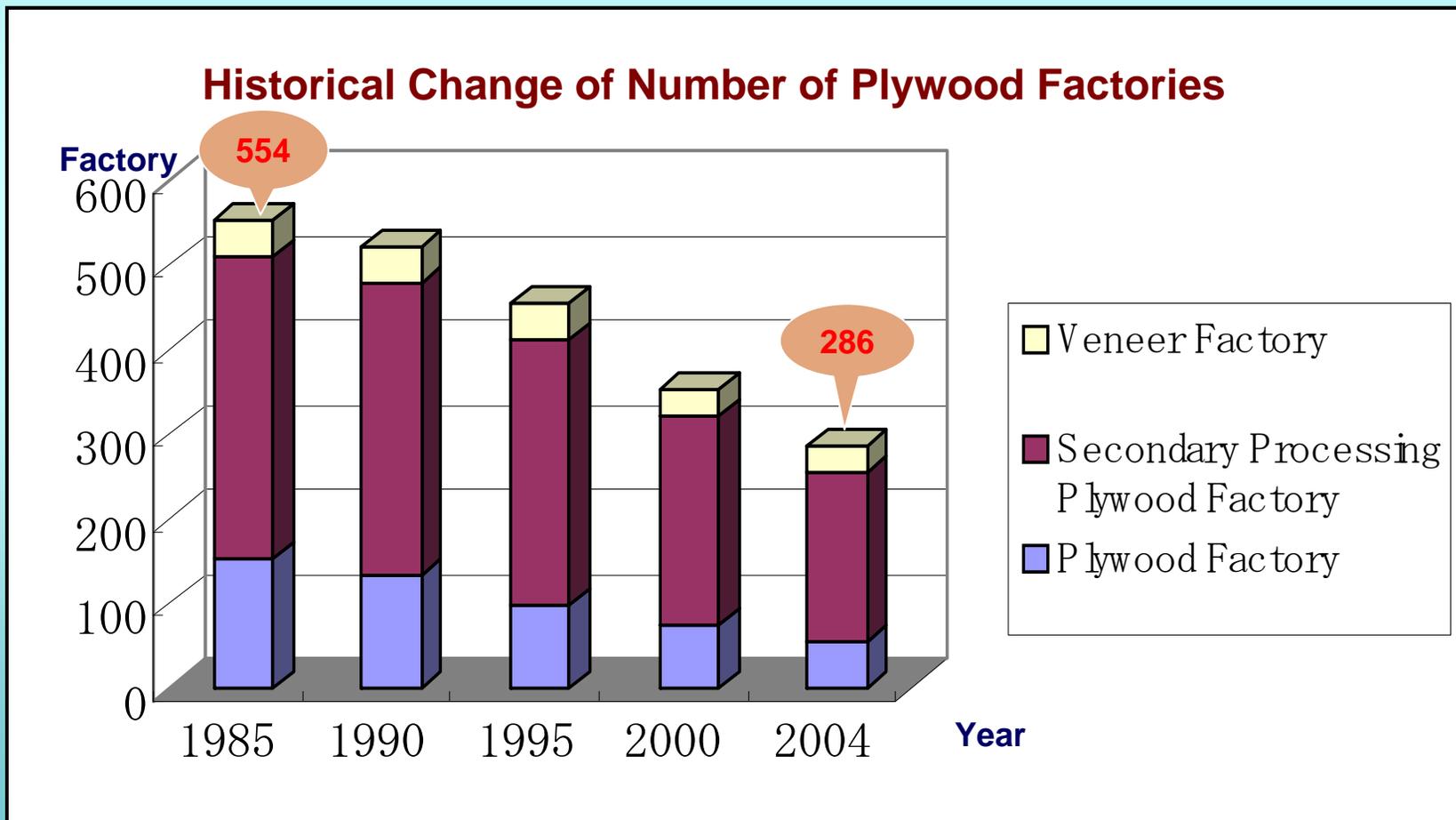
Log Consumption for Plywood Production

- The log consumption for plywood production in 2004 was 4,994,000 m³ of which imported logs and domestic logs accounted for 89% and 11% respectively.
- Decrease of Indonesia, Malaysia, PNG & Solomon Is. logs and increase of Russia logs in recent years



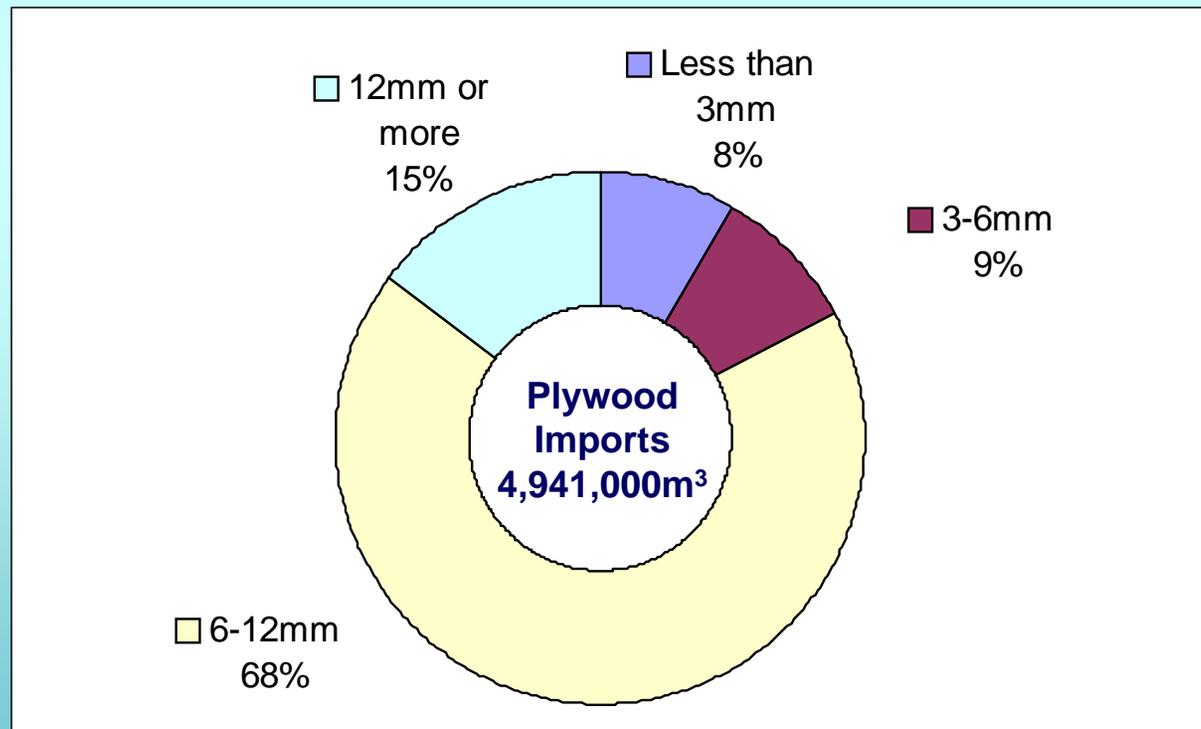
Change of Number of Plywood Factories

- The total number of plywood factories fell from 554 in 1985 to 286 in 2004.



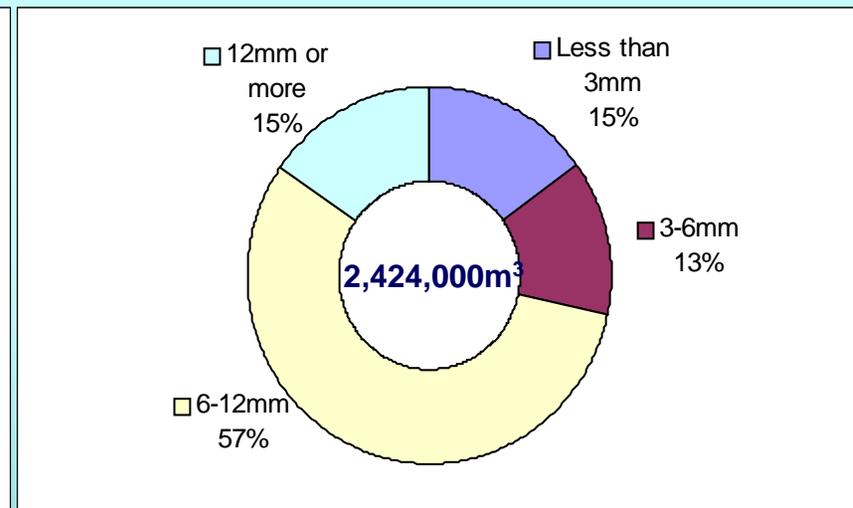
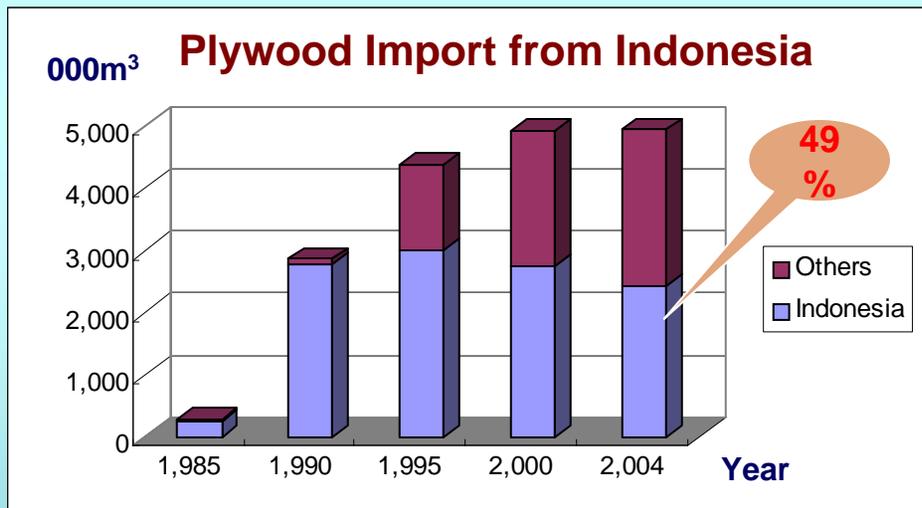
Plywood Imports by Thickness

- Plywood imports in 2004 totalled 4,941,000 m³. By thickness, those of less than 3 mm accounted for 8%, 3 – 6 mm for 9%, 6 – 12 mm for 68% and 12 mm or more for 15%.



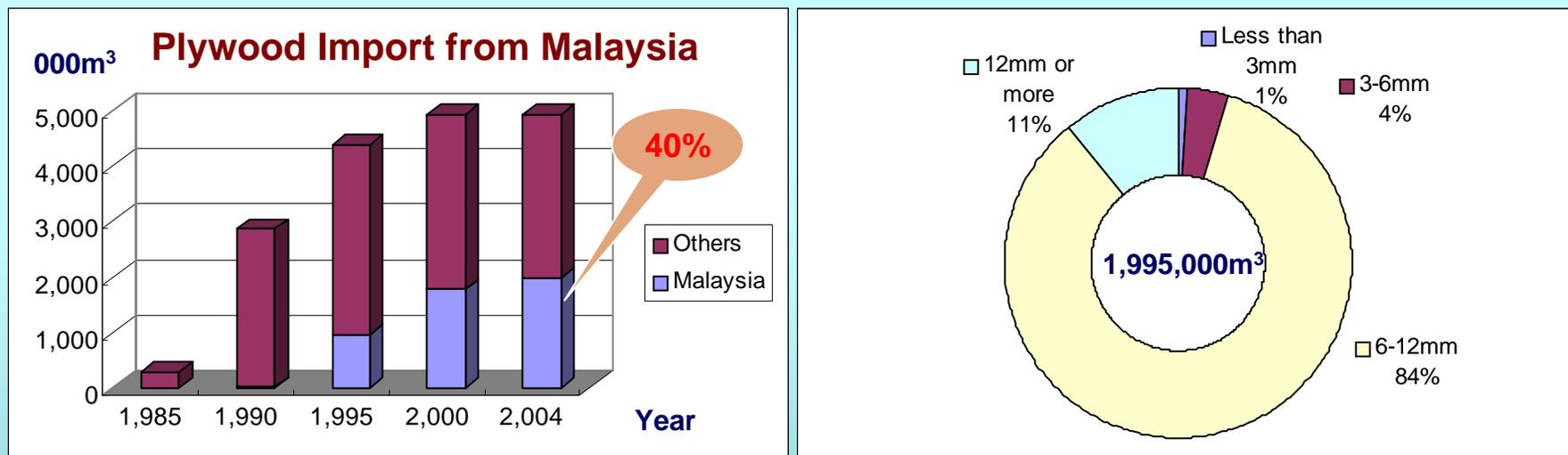
Plywood Imports from Indonesia

- Out of the total plywood imports of 4,941,000 m³ in 2004, Indonesia accounted for 2,424,000 m³ or 49%.



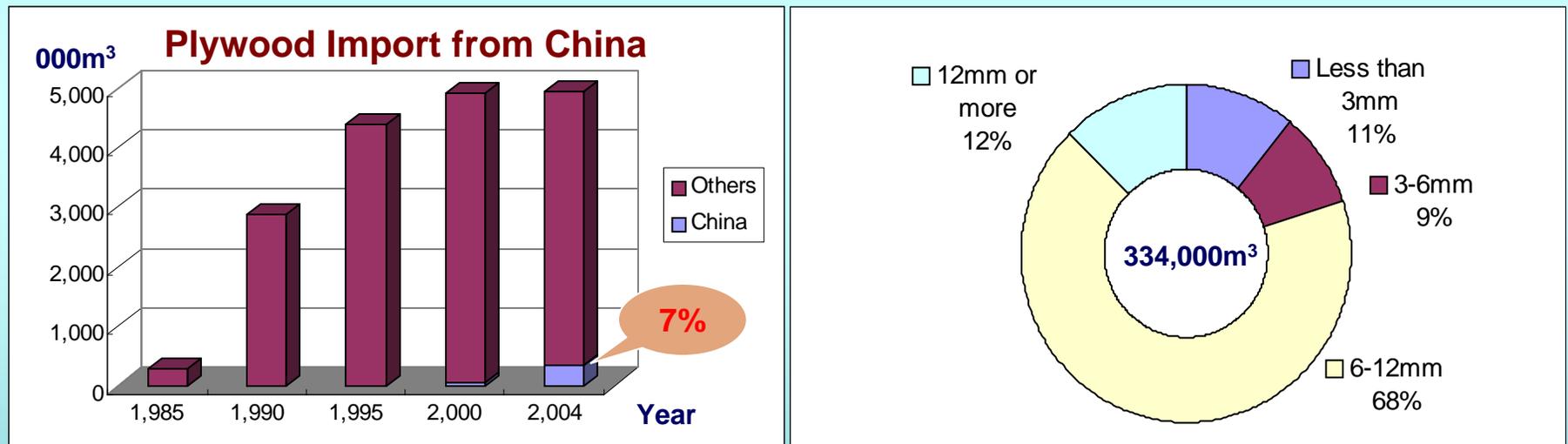
Plywood Imports from Malaysia

- Out of the total plywood imports of 4,941,000 m³ in 2004, Malaysia accounted for 1,995,000 m³ or 40%.



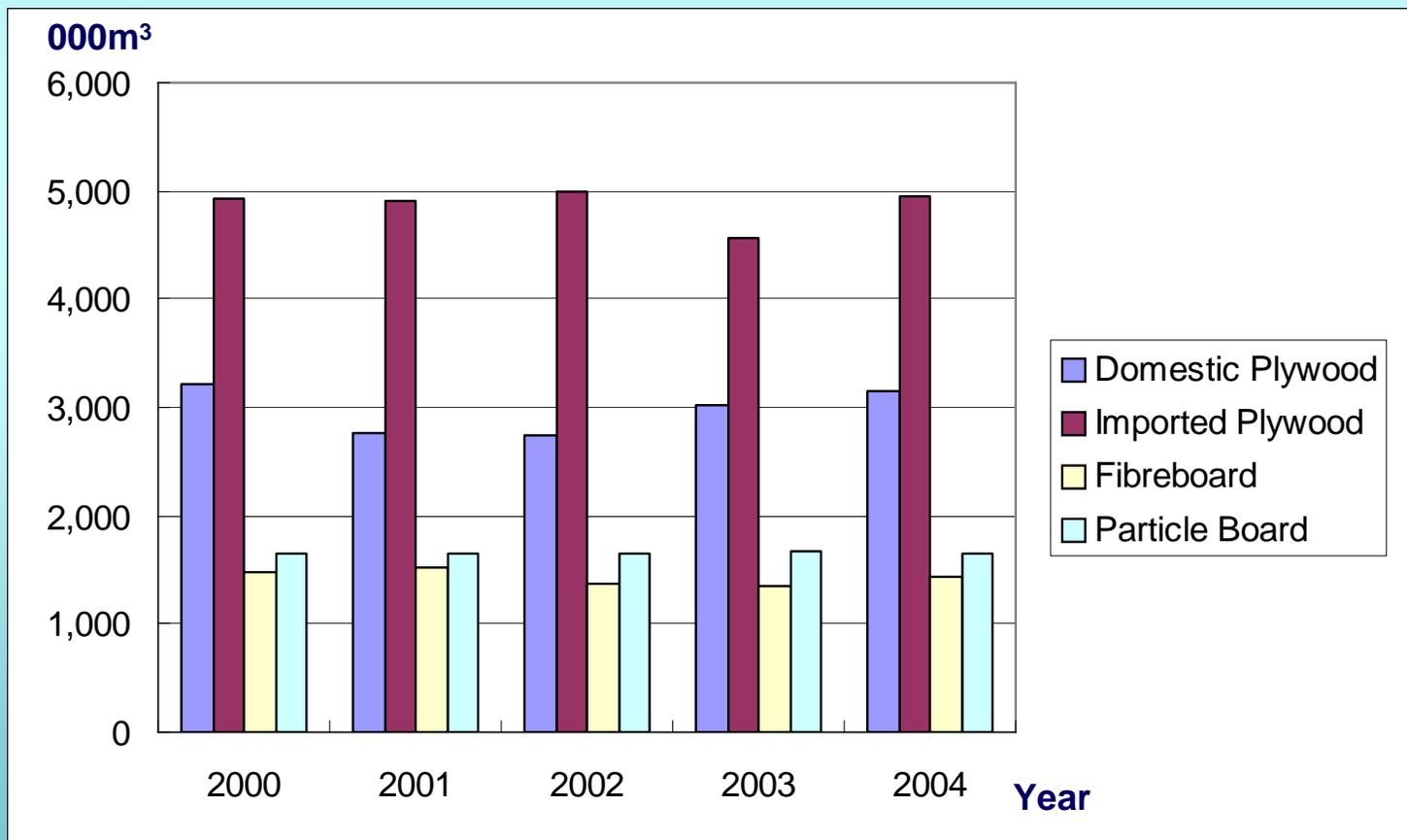
Plywood Imports from China

- Out of the total plywood imports of 4,941,000 m³ in 2004, China accounted for 334,000 m³ or 7%.



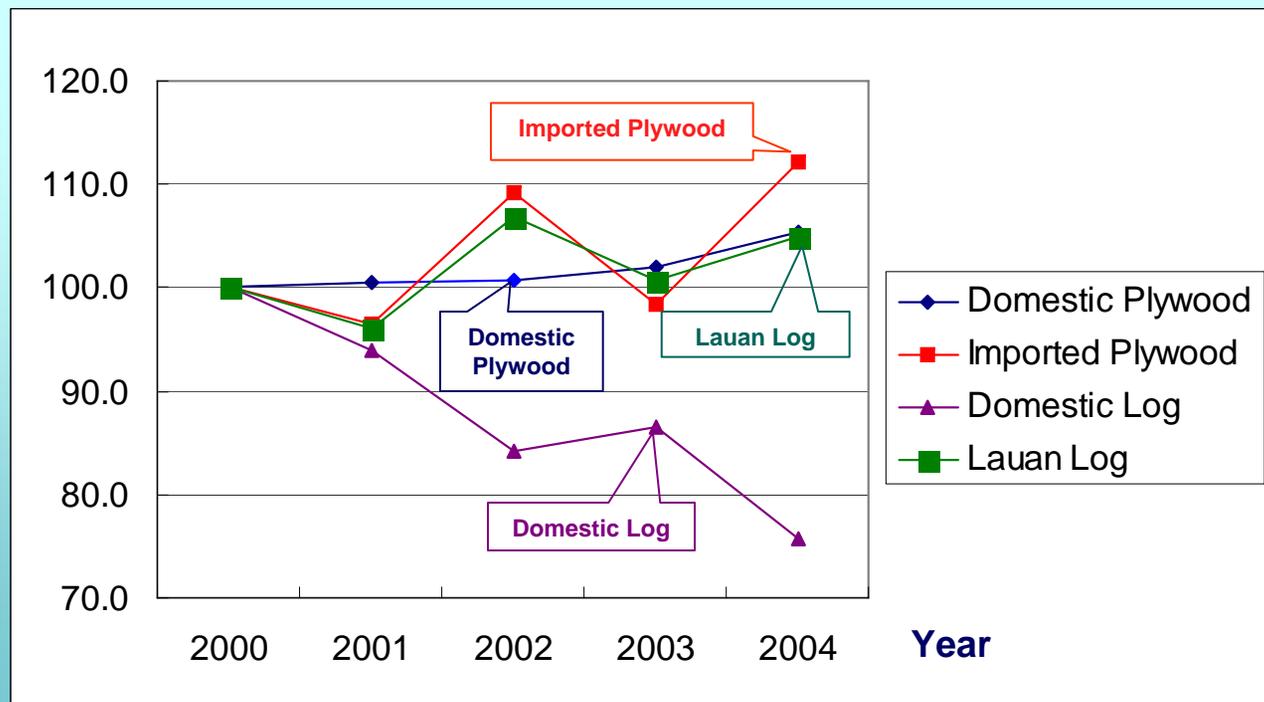
Supply Volumes of Plywood, Fibre Board and Particle Board in Recent Years

- No significant change of the total supply volumes of plywood, fibre board and particle board has taken place.



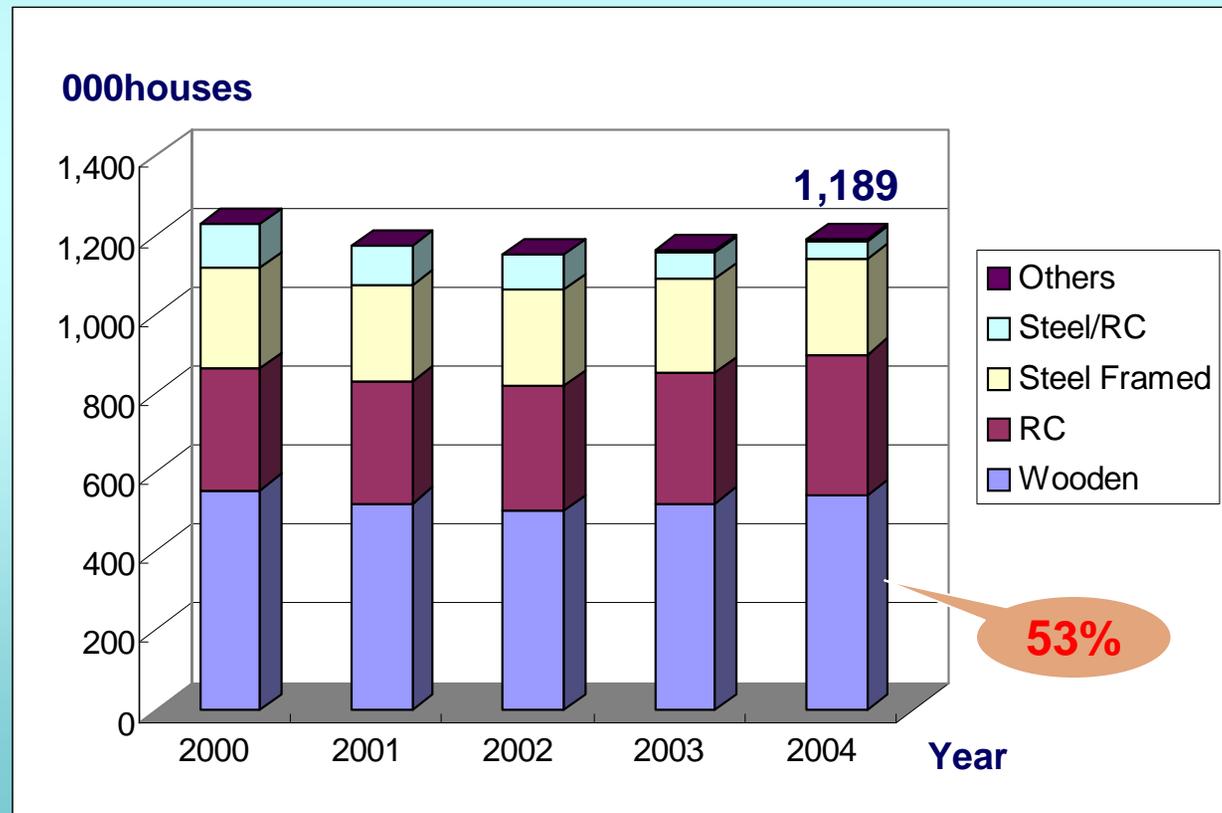
Business Price Index for Plywood and Logs in Recent Years (Compiled by the Bank of Japan)

- The price index for domestic plywood has been steady.
- The price index for imported plywood has shown many fluctuations.
- The price index for domestic logs has shown a declining trend.
- The price index for lauan logs has shown many fluctuations.



Number of Housing New Starts by Structure in Recent Years

- The ratio of new wooden houses has been steady around 53%.



Primary Tasks for Plywood Industry

- **Improved plywood performance to maximise housing value**

Especially improvement of the earthquake resistance, fire resistance, durability, workability and designability

- **Contribution to the efficient use of forest resources in the world by promoting the effective utilisation of poor quality logs and logs from hitherto unused species as raw materials for plywood**