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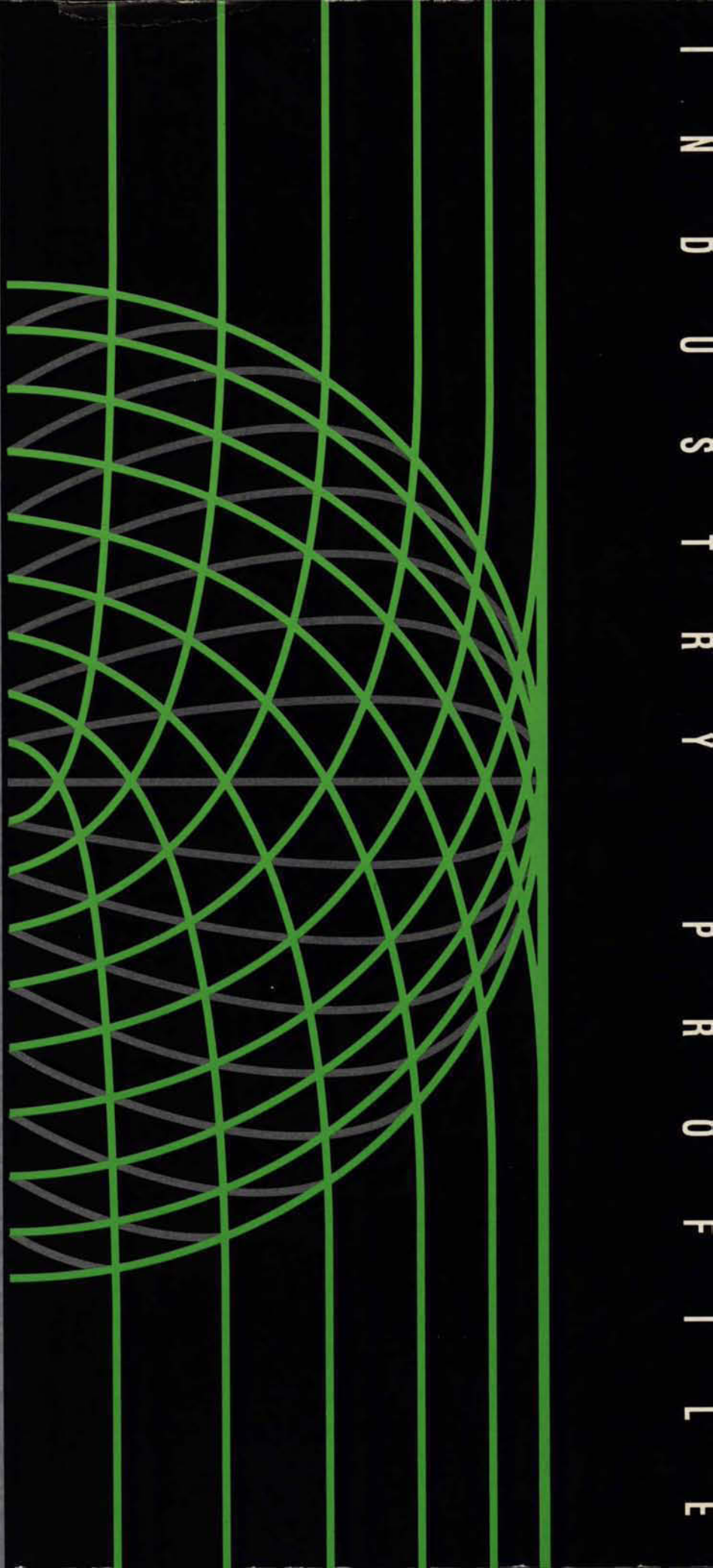
# Value-Added Wood Products

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**Canada**



1990-1991

**VALUE-ADDED WOOD PRODUCTS**INDUSTRY, SCIENCE AND  
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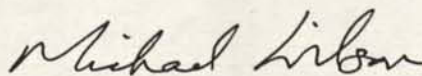
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TECHNOLOGIE CANADA**FOREWORD**

*In a rapidly changing global trade environment, the international competitiveness of Canadian industry is the key to growth and prosperity. Promoting improved performance by Canadian firms in the global marketplace is a central element of the mandates of Industry, Science and Technology Canada and International Trade Canada. This Industry Profile is one of a series of papers in which Industry, Science and Technology Canada assesses, in a summary form, the current competitiveness of Canada's industrial sectors, taking into account technological, human resource and other critical factors. Industry, Science and Technology Canada and International Trade Canada assess the most recent changes in access to markets, including the implications of the Canada-U.S. Free Trade Agreement. Industry participants were consulted in the preparation of the profiles.*

*Ensuring that Canada remains prosperous over the next decade and into the next century is a challenge that affects us all. These profiles are intended to be informative and to serve as a basis for discussion of industrial prospects, strategic directions and the need for new approaches. This 1990-1991 series represents an updating and revision of the series published in 1988-1989. The Government will continue to update the series on a regular basis.*



Michael H. Wilson  
Minister of Industry, Science and Technology  
and Minister for International Trade

**Introduction**

The forest products sector is a major component of the Canadian economy. In 1990, industries in the Canadian forest products sector had shipments totalling \$38.7 billion and exports of \$22 billion. That same year, they contributed \$19 billion to Canada's trade balance.

The forest products sector is of crucial economic importance to all regions of the country. Over 350 single-industry communities depend on it for their economic well-being. It provides direct employment for almost 300 000 people, including approximately 45 000 people in logging activities.

The forest products sector is composed of two major industry groups: paper and allied products industries and wood industries. The paper and allied products industries account for approximately 63 percent of total shipments and

employ approximately 130 000 people. This group is made up of two distinct segments: firms producing pulp and paper (market pulp, newsprint, fine papers and paperboard) and those making converted or value-added paper products (packaging, coated papers, business papers and stationery, tissue and other consumer paper products).

Wood industries account for 37 percent of total shipments and employ approximately 125 000 people. This group consists of two segments: firms making commodity products (e.g., lumber, plywood, shakes and shingles, veneer, particleboard, medium-density fibreboard, oriented strandboard (OSB)/waterboard) and those manufacturing value-added wood products (e.g., manufactured housing, doors, windows, kitchen cabinets, hardwood flooring, pallets and millwork).





Profiles regarding pulp, paper and allied products industries are available on

- *Book, Writing and Coated Paper*
- *Kraft Papers, Boxboard and Containerboard*
- *Market Pulp*
- *Newsprint and Uncoated Mechanical Printing Paper*
- *Value-Added Paper Products*

Profiles dealing with lumber and allied products industries are available on

- *Lumber*
- *Wood-Based Panel Products*
- *Wood Shakes and Shingles*

## Structure and Performance

### Structure

The value-added wood products industry consists of firms that manufacture a wide range of finished goods using wood as the basic building material. The name chosen for the profile reflects the fact that, while the industry is small relative to the Canadian lumber and panel products industries, it generates substantially more employment per unit of wood used and per dollar of sales than does primary production.

The major products of the industry include kitchen cabinets, comprising 20 percent of the value of total industry shipments; wooden windows, 18 percent; wooden doors, 13 percent; prefabricated buildings, 11 percent; wooden pallets, 6 percent; and mobile homes, 3 percent. The remaining 29 percent of total market value is made up of miscellaneous items made of wood, such as fencing, log homes, wooden trusses and other structural housing components, mouldings, flooring, architectural millwork, laminated timbers, furniture components, dimension stock and other specialty wood items.

Wood products firms obtain primary wood materials such as lumber and panels from lumber mills and transform them into building construction components. Many of the finished products are used in the new building or renovation markets and are sold either wholesale to contractors or directly to do-it-yourself consumers through retail lumber yards. Other outputs are remanufactured or intermediate wood products to be utilized in the manufacture of finished products.

Most of the 2 210 establishments comprising the industry in 1989 are small, mainly Canadian-owned firms that specialize in manufacturing only one product or type of product. Although together they employed an estimated 45 300 workers in 1989,

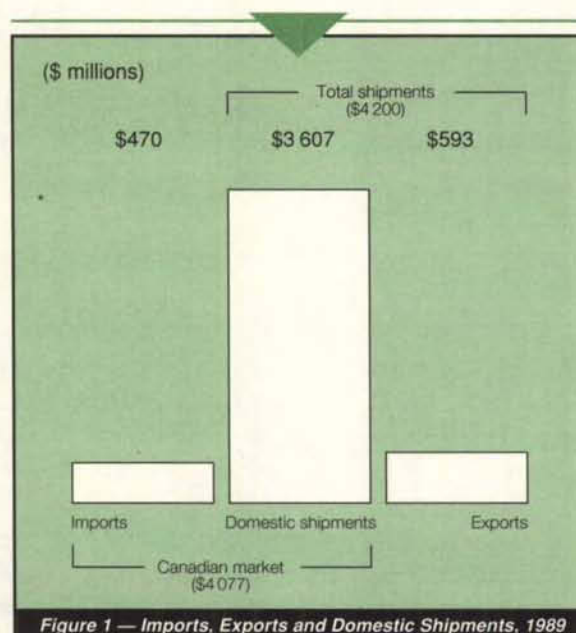


Figure 1 — Imports, Exports and Domestic Shipments, 1989

some 82 percent, or more than 1 800 of the firms, employed fewer than 20 workers. In 1989, industry shipments had an estimated value of \$4 200 million (Figure 1). Total industry exports in 1989 were worth \$593 million, 84 percent of which went to the United States. Imports in the same year totalled \$470 million, 84 percent of which came from the United States. Employment levels and value of the major industry subsectors for 1989 are presented in Table 1.

The industry is concentrated regionally in Ontario and Quebec, which account for 39 and 33 percent of shipments, respectively. With the exception of firms producing prefabricated buildings, mobile homes and remanufactured wood products, most plants in the industry are located in or near urban population centres.

Some segments of the industry are also concentrated by ownership. Despite the large number of small firms in the industry overall, a few leading companies in some industry segments account for a major proportion of total production. For example, in windows and doors, 23 companies account for 47 percent of shipments, and in prefabricated buildings, seven companies contribute 46 percent of shipments. In general, the larger firms are national in scope, while the smaller firms serve local or regional markets.

### Performance

Industry shipments during the decade to 1981 grew at a real rate of 2.2 percent annually. Although the 1981–1982 recession brought a substantial decline in shipments, recovery





after 1983 saw shipments increase from \$2 062 million to \$4 200 million by 1989 (Figure 2).

Industry activity closely follows cyclical trends in the level of new housing construction as well as interest in do-it-yourself and contracted renovation projects. Following a record level of new housing construction in the mid-1970s, activity then declined steadily until 1983 as a result of reduced demand caused by high interest rates and smaller families. During this period, activity in the prefabricated building and mobile home segments declined by more than 75 percent. Other industry segments were also affected to some degree, but windows, doors and kitchen cabinets in particular suffered reduced production levels and a high rate of corporate failure. The outcome was a leaner, more competitive industry. Many companies reduced inventory levels, concentrated on improving production efficiency and pursued niche export market opportunities, especially in the United States, to offset reduced domestic demand and increased competition.

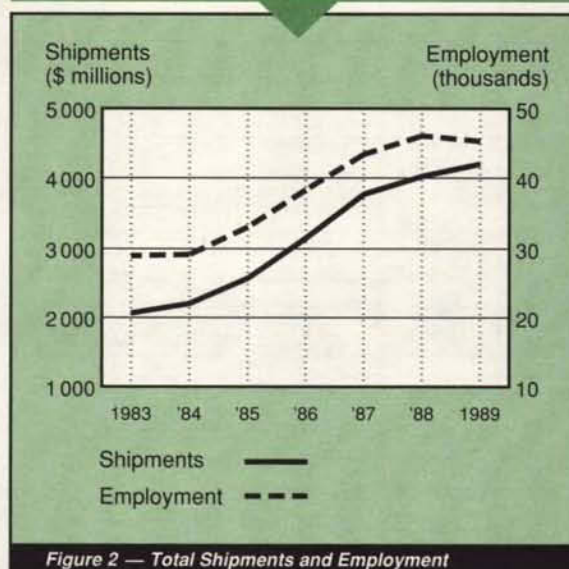
From 1983 to 1990, the level of new housing starts increased steadily to a high of 246 000 units in 1987, then declined to an estimated 160 000 units in 1990. By September 1991, the Canada Mortgage and Housing Corporation (CMHC) was projecting housing starts of 147 000 units in 1991. This has dampened domestic demand for products from the

**Table 1 — Major Segments of the Value-Added Wood Products Industry, 1989**

Product	Shipments (\$ millions)	Exports (\$ millions)	Imports (\$ millions)	Employment
Kitchen cabinets	850	33	20	10 500
Wood windows	735	6	27	6 850
Wood doors	565	48	19	5 650
Prefabricated buildings (wood)	465	76	62	3 650
Pallets and boxes	270	7	7	3 400
Mobile homes	130	3	18	1 150
Subtotal	3 015	173	153	31 200
Other	1 185	420 <sup>a</sup>	317 <sup>b</sup>	14 100
Total value-added wood products	4 200	593	470	45 300

<sup>a</sup>Includes \$212 million of mouldings, flooring, dowelling, etc., \$36 million of other builders' joinery and \$146 million of wood articles not elsewhere specified.

<sup>b</sup>Includes \$122 million of mouldings, flooring, dowelling, etc., \$19 million of other builders' joinery and \$45 million of wood articles not elsewhere specified.



**Figure 2 — Total Shipments and Employment**

industry, resulting in a decline in capacity utilization from former levels that were in excess of 90 percent.

Overall capacity utilization in the wood industry (including commodities) has declined to 82 or 83 percent in 1990, compared with levels in excess of 90 percent during 1988. In fact, industry sources indicate that some companies are currently operating at rates that are as low as 65 percent, reflecting the current downturn in construction activity.

Aggravating the situation are indications that demand in the do-it-yourself and renovation markets has also weakened significantly as home-owners delay major renovation projects. Growth in this market had been strong over the past decade, in contrast to the slowing in new residential construction, and has served in a major way to counterbalance declining demand for products previously targeted at the new housing market.

Trade in industry products traditionally has been mostly with the United States, and performance from 1976 to 1988 has largely been determined by competitive advantage. The growth in exports was steady until 1988, exceeding imports by a wide margin. In 1989, however, while total exports continued to rise, imports (primarily from the United States) increased markedly. This increase in imports reduced Canada's trade surplus from \$250 million to \$123 million in one year. Nonetheless, a couple of industry segments are exhibiting bright export growth potential: remanufactured wood products, particularly to the United States, and log homes to Japan. Japan is now the largest single export market for log homes, accounting for over \$30 million in exports in 1989.





Historically, the industry has earned profit margins comparable with the average for manufacturing as a whole and has had conservative debt-to-equity and working capital ratios. The 1981-1982 recession reduced the industry's profitability and liquidity and increased its liabilities relative to its situation in the mid-1970s. This squeeze brought about industry restructuring that put it in a better position to withstand new competitive pressures.

## Strengths and Weaknesses

### Structural Factors

The small size and urban market dependency of the majority of companies in the value-added wood products industry make it especially vulnerable to competitive market forces. Key factors affecting the industry's ability to compete are fragmentation and scale of production, the cyclical nature of construction and renovation activity, level of technology and innovation as well as management and marketing skills.

The fragmentation of the industry among 2 210 non-integrated establishments results largely from ease of entry. Entry barriers are low as a result of low capital requirements, the simple technology and the relatively modest level of expertise and skills required. The persistent fragmentation has been fostered by high tariff protection and high transportation costs, which have tended to insulate local markets. Low capital requirements have also eased entry and have allowed firms to be established, despite a lack of efficiency. The small scale of production and limited financial resources of the large majority of companies have also tended to keep investment in new technology to a minimum. As a result, industry technology tends to lag behind that of major international competitors.

A major strength of the industry lies in firms' ability to give close personal attention to customers' wants, especially in nearby urban centres, and their small size allows them close working relations domestically. At the same time, the small scale of most manufacturing operations relative to those of major U.S., European and Japanese competitors is a serious competitive disadvantage for the industry internationally. For example, in the window, kitchen cabinet, manufactured housing, mobile home, pallet and moulding segments, even the largest Canadian plants are dwarfed by those in other countries. Accordingly, most Canadian firms suffer competitive disadvantages in terms of productivity, cost performance, financial resources and marketing capability. With respect to doors, flooring and fencing, scale differences are not as significant, since foreign competitors are of similar size.

Small Canadian production facilities are nevertheless well suited to respond to small orders, both domestically and

internationally. In addition, certain companies in the industry are known for their quality, reliable service and innovative products. While these strengths are not general throughout the industry, they have enabled a number of companies to develop niche markets. In addition, some companies have become world leaders in innovative product development designed to conserve energy, a result of experience with Canada's climatic extremes.

Cyclical demand in construction and renovation is responsible for the high turnover rate of firms in the industry and frequently results in problems of overcapacity, excessive price competition and fluctuating profit margins. Furthermore, it tends to aggravate the industry's major structural problem of poor economies of scale.

Much of the industry is characterized by a lack of uniformity in specialized management skills or production efficiency. The degree of management specialization varies considerably, ranging from firms that are highly decentralized to plants managed by one individual. Currently, companies run the full gamut from sophisticated, automated operations to labour-intensive, almost handicraft operations. In addition, unit costs are generally higher than those achieved by major competitors whose larger domestic markets have allowed for more specialized production. These management and production factors have held back the vast majority of Canadian firms from taking a more aggressive approach to developing new markets and achieving cost competitiveness.

While it is too early to fully assess the implications to the industry of the introduction of the goods and services tax (GST) on 1 January 1991, it clearly will result in a more level playing field between domestic production and imports, since both will be taxed at the same rate. Formerly, imports escaped the manufacturers sales tax on wholesaling and build-and-install activities, whereas domestic production was subject to it and was competitively disadvantaged as a result. In addition, Canadian industry exports will not be subject to the GST and should benefit in terms of their competitive position in world markets. In the short term, it is anticipated that the GST will have some dampening effect on market demand in Canada for new housing construction and renovation activity, thereby reducing demand for products from the industry.

While many companies are not highly skilled in marketing and market development relative to their overseas and U.S. counterparts (which benefit from national advertising and ample financial resources), a few of the leading, more progressive companies have established their products in the United States, Europe, Japan and elsewhere. For example, the kitchen cabinet, wood door, manufactured housing and remanufactured wood products segments have developed important niche markets. Log home sales to Japan currently constitute a





particularly promising export opportunity, accounting for approximately 50 percent of production. Similarly, the remanufactured wood products segment in British Columbia currently exports over 80 percent of its production to foreign markets.

The federal government is looking to increase these and similar export markets in its forest policy, which emphasizes value-added production through increased investment and market promotion. The goal is to boost international competitiveness of the industry by increasing the value-added component of the overall forest products sector, of which value-added wood products is an important part.

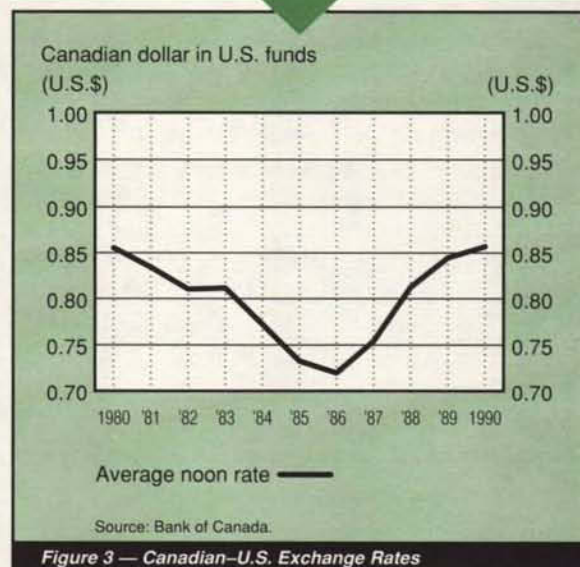
### Trade-Related Factors

Traditionally, Canadian value-added wood products have been protected by high tariffs (9 to 15 percent) relative to those in the United States, the European Community (EC) and Japan, all of which have imposed tariffs generally in the range of 2.5 to 7.5 percent. Table 2 gives the 1991 Canadian and U.S. rates under the Canada-U.S. Free Trade Agreement (FTA), which was implemented on 1 January 1989, as well as the EC and Japanese rates for major value-added wood products. Tariffs on kitchen cabinets and wood doors are being removed in five equal, annual stages under the FTA, while tariffs on wood windows and prefabricated buildings are being removed in ten equal, annual stages. The higher Canadian tariffs in the past have provided a measure of protection for the industry, particularly to the smaller companies.

Several non-tariff barriers affect industry exports, some of which are addressed in the FTA. In addition to tariff elimination, the FTA provides that efforts be made to harmonize technical standards between Canada and the United States. Building codes, for example, can be complex, and further complications arise because they are administered at the regional rather than federal level. The considerable differences in building codes among countries and provinces can restrict trade in manufactured housing and components, particularly modular housing units that include wiring and plumbing. The same is true of the mobile home segment, where units are subject to different

**Table 2 — Tariff Rates on Selected Products, 1991 (%)**

Product	Canada	United States	European Community	Japan
Kitchen cabinets	6.0	1.0	5.6	4.8
Prefabricated buildings (wood)	6.4	3.6	6.0	3.9
Wood doors	4.5	3.8	6.0	free
Wood windows	8.7	3.6	6.0	free



**Figure 3 — Canadian-U.S. Exchange Rates**

product performance standards and certification procedures. In contrast, standards established for kitchen cabinets, doors, windows, pallets, etc. have not had a restrictive impact on trade.

Other factors such as government procurement practices, import licensing and product-testing requirements have also constrained exports to countries such as Japan, the Republic of Korea and the United States.

### Technological Factors

The pace of technology adoption in the Canadian value-added wood products industry has been slow. Traditionally, product innovation has been made in-house on the basis of ideas from competitors, foreign visits, new product literature and consumer trends. Research and development (R&D) related to machinery and equipment has historically been done by equipment suppliers and adapted by the companies to meet specific needs. Major suppliers of new state-of-the-art machinery and equipment have been Germany, Italy, Japan and the United States, with only limited Canadian capability.

The FTA is putting some pressure on firms to meet the challenge of competing in North American markets. With industry consultation, the phase-out of tariffs on kitchen cabinets is to be in five equal, annual stages. For wood windows and manufactured housing, however, the problem is not as immediate, and attempts are being made to take full advantage of the ten-stage tariff phase-out adjustment period. This will allow more time to improve competitiveness through mechanization, increased specialization to attain scale economies, production line improvements and industry rationalization.





### Other Factors

The industry has expressed concern about the relatively higher value of the Canadian dollar in recent periods vis-à-vis the American dollar (Figure 3). On the other hand, under certain economic conditions, it is widely recognized that a significantly lower value is likely to be inflationary. The resulting higher domestic costs and prices can erode, over time, the short-term competitive gains of such a lower-valued dollar.

Larger environmental considerations, while being a significant problem in other industries within the forest products sector such as pulp and paper, are not a significant concern in value-added wood products manufacturing.

### Evolving Environment

Given the market reliance for most value-added wood products on housing demand, new housing construction was the largest single demand component until the mid-1980s, when renovation expenditures began to exceed it. The CMHC projects housing starts to average 178 000 units annually over the next 10 years. This is well above the 147 000 units expected in 1991 but is in line with the annual rate of 180 000 achieved during the 1980s.

At the time of writing, the Canadian and U.S. economies were showing signs of recovering from a recessionary period. During the recession, some key industry segments (such as kitchen cabinets, windows and doors and mouldings) experienced declines, while other segments have fared better, notably prefabricated buildings and log homes. In some cases, the cyclical pressures may have accelerated adjustments and restructuring. With the signs of recovery, though still uneven, the outlook will correspondingly improve. The overall impact on the industry will depend on the pace of the recovery.

Export markets are expected to continue to provide growth opportunities for leading companies in such product areas as kitchen cabinets, wooden doors, prefabricated buildings, log homes, solid wood panelling, fencing and remanufactured wood products.

The competitive environment will bring about structural change in virtually every segment of the industry. The required improvements in marketing and cost performance occasioned by increased international competition will necessitate industry rationalization, corporate restructuring, product specialization, larger average company sizes and further mechanization. These changes are taking place in the kitchen cabinet, window, door and prefabricated building segments, where leading firms are aggressively modernizing and streamlining their operations as well as pursuing new export market opportunities. Other industry segments are following suit to varying degrees.

Tariff elimination under the FTA on balance will place many Canadian companies in more competitive markets. Given the predominance of small companies in some segments such as kitchen cabinets, elimination of the 15 percent tariff in five equal, annual stages will result in major restructuring as firms adjust to achieve the economies of scale available in North American markets. The tariff elimination in five stages for some industry segments and in ten stages for others will allow some room for adjusting to the larger and more competitive market and will also minimize to some extent the disruptive effects of increased competition. Factors including improvements in technology, strengthened marketing and management skills, increased investment, product improvement and product specialization will be particularly important for a successful adjustment process.

### Competitiveness Assessment

The adverse factors confronting the industry's domestic and international market performances are numerous. The decline in residential and renovation construction activity in both Canada and the United States has tended to accelerate adjustments arising from the FTA. While a number of companies will remain internationally competitive and will continue to develop significant export opportunities in the United States, Western Europe and more recently Japan, the net result of the restructuring is expected to be a smaller industry in terms of shipments and employment, composed of fewer but larger, more efficient firms that are better able to compete in the international trading environment. Rationalization will also place a premium on better managerial talent in the leadership of the new, leaner industry.

The Canadian industry will also have to strive for competitive product leadership through innovation to expand markets. The Canadian experience in dealing with extreme variations in climate can help to provide the edge needed in the area of energy conservation and to create significant export opportunities for Canadian value-added products such as wooden windows and doors or manufactured housing.





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For further information concerning the subject matter  
contained in this profile or in the ISTC sectoral studies  
(see page 12), contact

Forest Industries Branch  
Industry, Science and Technology Canada  
Attention: Sector Strategy and Value-Added Wood Products  
235 Queen Street  
OTTAWA, Ontario  
K1A 0H5  
Tel.: (613) 954-3029  
Fax: (613) 954-3079





## PRINCIPAL STATISTICS<sup>a</sup>

	1973 <sup>b</sup>	1983	1984	1985	1986	1987	1988	1989
Establishments	1 180	1 895	1 961	1 986	2 101	2 034	2 245	2 210 <sup>c</sup>
Employment	28 143	28 992	29 171	33 074	38 306	43 388	46 059	45 300 <sup>c</sup>
Shipments (\$ millions)	842	2 062	2 204	2 574	3 150	3 770	4 024	4 200 <sup>c</sup>
GDP <sup>c</sup> (constant 1981 \$ millions)	N/A	N/A	N/A	N/A	983	1 065	1 082	1 109

<sup>a</sup>For establishments, employment and shipments, see *Wood Industries*, Statistics Canada Catalogue No. 35-250, annual (SICs 2541, prefabricated wooden buildings industry; 2542, wooden kitchen cabinet and bathroom vanity industry; 2543, wooden door and window industry; 2549, other millwork industries; 2561, wooden box and pallet industry; and 2599, other wood industries not elsewhere classified); and *Transportation Equipment Industries*, Statistics Canada Catalogue No. 42-251, annual (SIC 3244, mobile home industry).

<sup>b</sup>Data for this year are not strictly comparable with data for other years shown, due to changes in the definition of the industry(ies) that were introduced in the revised edition of *Standard Industrial Classification, 1980*, Statistics Canada Catalogue No. 12-501.

<sup>c</sup>ISTC estimates.

N/A: not available

## TRADE STATISTICS

	1973 <sup>a</sup>	1983	1984	1985	1986	1987	1988 <sup>b</sup>	1989 <sup>b</sup>
Exports <sup>c</sup> (\$ millions)	77	240	310	350	450	467	500	593
Domestic shipments (\$ millions)	765	1 822	1 894	2 224	2 700	3 303	3 524	3 607
Imports <sup>d</sup> (\$ millions)	80	170	160	164	233	262	250	470
Canadian market (\$ millions)	845	1 992	2 054	2 388	2 933	3 565	3 774	4 077
Exports (% of shipments)	9.1	11.6	14.1	13.6	14.3	12.4	12.4	14.1
Imports (% of Canadian market)	9.5	8.5	7.8	6.9	7.9	7.3	6.7	11.5

<sup>a</sup>Data for this year are not strictly comparable with data for other years shown, due to changes in the definition of the industry(ies) that were introduced in the revised edition of *Standard Industrial Classification, 1980*, Statistics Canada Catalogue No. 12-501.

<sup>b</sup>It is important to note that data for 1988 and after are based on the Harmonized Commodity Description and Coding System (HS). Prior to 1988, the shipments, exports and imports data were classified using the Industrial Commodity Classification (ICC), the Export Commodity Classification (XCC) and the Canadian International Trade Classification (CITC), respectively. Although the data are shown as a continuous historical series, users are reminded that HS and previous classifications are not fully compatible. Therefore, changes in the levels for 1988 and after reflect not only changes in shipment, export and import trends, but also changes in the classification systems. It is impossible to assess with any degree of precision the respective contribution of each of these two factors to the total reported changes in these levels.

<sup>c</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

<sup>d</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.





### SOURCES OF IMPORTS<sup>a</sup> (% of total value)

	1985	1986	1987	1988	1989
United States	74	74	77	76	84
European Community	10	8	7	8	6
Asia	9	11	12	12	7
Other	7	7	4	4	3

<sup>a</sup>See *Imports by Commodity*, Statistics Canada Catalogue No. 65-007, monthly.

### DESTINATIONS OF EXPORTS<sup>a</sup> (% of total value)

	1985	1986	1987	1988	1989
United States	94	94	88	86	84
European Community	3	3	6	5	6
Asia	2	2	4	6	6
Other	1	1	2	3	4

<sup>a</sup>See *Exports by Commodity*, Statistics Canada Catalogue No. 65-004, monthly.

### REGIONAL DISTRIBUTION<sup>a</sup> (average over the period 1986 to 1988)

	Atlantic	Quebec	Ontario	Prairies	British Columbia
Establishments (% of total)	7	35	31	13	14
Employment <sup>b</sup> (% of total)	6	33	38	11	12
Shipments <sup>b</sup> (% of total)	5	33	39	10	13

<sup>a</sup>See *Wood Industries*, Statistics Canada Catalogue No. 35-250, annual; and *Transportation Equipment Industries*, Statistics Canada Catalogue No. 42-251, annual.

<sup>b</sup>ISTC estimates.





## MAJOR FIRMS

Name	Country of ownership	Location of major plants
<b>Doors</b>		
Premdor Inc.	Canada	Scarborough, Ontario
Sauder Industries Limited	Canada	Vancouver, British Columbia
<b>Kitchen Cabinets</b>		
Canac Kitchens Ltd.	Canada	Thornhill, Ontario
Kitchen Craft of Canada Ltd.	Canada	Winnipeg, Manitoba
M.K.S. Products Inc.	Canada	Laval, Quebec
Merit Kitchens Ltd.	Canada	Surrey, British Columbia
<b>Manufactured Housing</b>		
ATCO Ltd.	Canada	Calgary, Alberta
Kent Homes Limited	Canada	Moncton, New Brunswick Buctouche, New Brunswick
Nelson Lumber Company Ltd.	Canada	Lloydminster, Alberta
Quebeco Homes Inc.	Canada	Val d'Or, Quebec
Viceroy Homes Limited	Canada	Scarborough, Ontario
<b>Windows</b>		
Dashwood Industries Limited	Canada	Centralia, Ontario
Donat Flamand Inc.	Canada	Saint-Apollinaire, Quebec
Lock-Wood Ltd.	Canada	Scoudouc, New Brunswick
C.P. Loewen Enterprises Ltd.	Canada	Steinbach, Manitoba
Mason Windows Ltd.	Canada	Pickering, Ontario
Pella Hunt Corporation	Canada	London, Ontario
<b>Other Value-Added Wood Products</b>		
Bois Franc Royal Ltée	Canada	Belœil, Quebec
John Lewis Industries Ltd.	Canada	Anjou, Quebec
Sawarne Lumber Company Ltd.	Canada	Richmond, British Columbia





## INDUSTRY ASSOCIATIONS

L'Association provinciale de l'industrie du bois  
ouvré du Québec Inc.  
Suite 200, 485 Langelier Boulevard  
QUEBEC CITY, Quebec  
G1K 5P4  
Tel.: (418) 529-7258  
Fax: (418) 648-1797

Canadian Kitchen Cabinet Association  
27 Goulburn Avenue  
OTTAWA, Ontario  
K1N 8C7  
Tel.: (613) 233-6205  
Fax: (613) 233-1929

Canadian Manufactured Housing Institute  
Suite 702, 200 Elgin Street  
OTTAWA, Ontario  
K2P 1L5  
Tel.: (613) 563-3520  
Fax: (613) 232-4635

Canadian Window and Door Manufacturers Association  
27 Goulburn Avenue  
OTTAWA, Ontario  
K1N 8C7  
Tel.: (613) 233-6205  
Fax: (613) 233-1929

Canadian Wood Pallet and Container Association  
P.O. Box 640  
PICKERING, Ontario  
L1V 3T3  
Tel.: (416) 831-3477  
Fax: (416) 831-3477

Laminated Timber Institute of Canada  
4315 - 92nd Avenue  
EDMONTON, Alberta  
T6B 3M7  
Tel.: (403) 465-9771  
Fax: (403) 469-1667





## SECTORAL STUDIES AND INITIATIVES

The following reports can be obtained from Industry, Science and Technology Canada (see address on page 7).

### **Situation Report – Architectural Millwork**

This report contains basic factual data on the industry and current situation. April 1989.

### **Situation Report – Furniture Components**

This report contains basic factual data on the industry and current situation.

### **Situation Report – Kitchen Cabinets**

This report contains basic factual data on the Canadian kitchen cabinet industry and current situation. July 1990.

### **Situation Report – Machine Profiled Log Homes**

This report contains basic factual data on the industry and current situation. October 1989.

Industry, Science and Technology Canada has recently supported the following initiatives.

### **The Co-operative Industrial and Market Development Program (CIMDP)**

A national program jointly funded by the federal and provincial governments and industry, the CIMDP is aimed at increasing industrial development and market promotion in the value-added wood products industry. The first regional element of the program was launched in British Columbia in June 1989.

### **The Timber Frame Construction (TFC) Demonstration Housing Program**

This program was established in 1990 to promote Canadian timber frame housing and value-added wood products in priority offshore markets. Its objective is to assist trade associations and company alliances in their efforts to enhance the acceptance and competitiveness of Canadian building techniques and standards, manufactured housing systems and building products in these markets.

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