



# C I N T R A F O R

## Director's Notes

I am pleased to present this inaugural issue of the CINTRAFOR Newsletter as a means of communicating with you the developments and program activities of this center. As many of you know, CINTRAFOR was first established by the Washington State Legislature in 1984 to provide a directed focus toward research, analysis and the dissemination of information related to the expansion of international trade opportunities for forest products. This effort was expanded by the 1985 session of the Washington State Legislature, and actively combined the financial resources of the University of Washington, the Washington Department of Trade and Economic Development, and the forest products industry. Initial development grants have been received from the Weyerhaeuser Company Foundation, the Plum Creek Timber Company through the Burlington Northern Foundation, Simpson Timber Company, ITT Rayonier Company, and Pacific Lumber and Shipping Company.

Throughout this newsletter, you will find information about the organization and programs of CINTRAFOR. The CINTRAFOR effort is guided by an Executive Board representing senior-level executive experience in forest products trade. Through INTRADATA, the series of CINTRAFOR publications, and an expanding series of seminars and symposia, the resources of CINTRAFOR are now available to serve the forest products industry and the needs of government at the

state, regional, and national levels. Cooperative efforts with the U.S. Forest Service, the IMPACT program in international trade in agriculture at Washington State University, the new Evergreen Partnership in Washington, other state and federal agencies, and forest industry organizations and trade associations are designed to provide coordination and maximum program effectiveness.

CINTRAFOR welcomes your comments. Please complete the enclosed form for our mailing list so that we can provide you with the types of information of most value to you.

## Washington State Forest Products Trade Directory

In a cooperative effort with the Washington Department of Trade and Economic Development and the newly formed Evergreen Partnership, CINTRAFOR is currently involved with developing a trade directory for Washington State's forest products industry. The purpose of the trade directory is to bring together in a single document information about all of the various firms and related groups involved in the trade of Washington State forest products, both domestically and internationally. This will include not only the producers of forest products, but also allied service industries, such as banking, trade companies, and transportation. If your company or organization has not

received a questionnaire and would like to be included in the directory, please contact Erik Anderson at the CINTRAFOR main office.

## What is CINTRAFOR?

The Center for International Trade in Forest Products (CINTRAFOR) was established at the University of Washington to respond to opportunities and problems relating to the export and import of wood products. CINTRAFOR programs involve the cooperative effort of the forest products industry, state and federal organizations, and the University of Washington.

## Public Information Center

The center is established as a focal point for dissemination of information on world trade in forest products by means of seminars, conferences, workshops and publications.

## Data Management

INTRADATA was developed to maintain a publicly accessible management service for forest products and international trade statistics.

## Education

A multidisciplinary graduate program emphasizing international trade in forest products is offered.

## Research

Research is conducted dealing with specific problems and opportunities in international trade. Reports are compiled into CINTRAFOR "Working Papers" and "Reprint" series, and are available upon request.

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## **International Trade Data System (INTRADATA)**

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The development and maintenance of the CINTRAFOR data management service for international trade statistics is now operational, and is known as INTRADATA. One objective of CINTRAFOR's INTRADATA effort is to gather together many of the existing statistical data series relevant to forest products trade and organize them within a single data base system that is easy to use and permits easy cross-referencing. A second objective of INTRADATA is to develop, through research projects and contacts with foreign organizations, additional series of data not normally maintained by others. This service is available to the public through CINTRAFOR and the University of Washington Academic Computing Service.

At the present time, INTRADATA includes selected data sets from: (1) "Production, Prices, and Employment in Northwest Forest Products Industries" (1974-84) accessed from the Pacific Northwest Forest and Range Experiment Station Trade Data Bank. (2) The FAO Forest Products Yearbook trade tape from Rome, Italy. (3) Data from the USFS publication "U.S. Timber Production, Trade, Consumption, and Price Statistics, 1950-84." This data base is scheduled for completion and public access by September 1986. Work is also being done on the creation of a data base that will include information on forest inventories and harvest levels for all countries. This will include data on reforestation and deforestation.

One of CINTRAFOR's major activities during the past year has been to disseminate information about INTRADATA. INTRADATA conducted tutorial seminars utilizing the University of Washington computer facilities. The staff has attended conferences and seminars and provided introductory information about the INTRADATA system.

As a result, a number of inquiries have been received by the INTRADATA staff from representatives of federal, state, and local government, private industry, and academic institutions. Several organizations have established online access as users of the INTRADATA services.

To make the INTRADATA system and DATABNK software package understandable, development of documentation and a tutorial guide have been completed. The following documents/aids are currently available from INTRADATA: (1) INTRADATA User Guide, (2) INTRADATA Variable Dictionary, and (3) "Introduction to INTRADATA"—a set of three tutorial diskettes. For more information on INTRADATA, please contact the CINTRAFOR office.

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## **Global Issues and**

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## **Outlook in Pulp and Paper**

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## **An International**

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## **Symposium,**

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**May 27-29, 1987**

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The Center for International Trade in Forest Products (CINTRAFOR) and the Washington Pulp and Paper Foundation of the College of Forest Resources at the University of Washington are organizing a major international symposium to review the present worldwide status of the pulp and paper industry as well as the major emerging trends. Speakers from industry, trade associations, research organizations, consulting groups, government, and academia will focus on the major issues from their respective vantage points. Strategic issues will be the main topics for the first day, while the last two days will deal primarily with technical and business concerns.

Attention will focus on the planned additional production capacity in the world over the next decade. Also, important policy issues, prob-

lems, and opportunities in producing and consuming countries will be discussed, including the United States, Canada, Japan, Western Europe, Latin America, and New Zealand. It is anticipated that political leaders, high-level executives and administrative officials of major international pulp and paper companies will be participants.

Technical and business issues confronting the pulp and paper industry will also be addressed. Technical issues will range from manufacturing developments, emerging technologies in manufacturing and transportation, and process and quality control and management techniques. Business issues will include raw material and chip flows in the world, financial arrangements, joint ventures, product mix questions, marketing arrangements, and production and consumption trends in major parts of the world.

A synthesis of the technical and business issues and trends as viewed from the vantage of major geographical regions will be developed. Specific attention will be focused on the future balance of supply and demand for pulp and paper products and relative price and cost trends in the world.

Ample opportunity will exist for joint meetings and interchanges between the participants from different countries and different segments of the pulp and paper sector. It is anticipated that this symposium will provide an atmosphere for the exchange of expertise and discussion on current trends in the pulp and paper industry.

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## **Washington Forest**

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## **Products Network**

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CINTRAFOR has established an informal communications network in conjunction with the Washington Department of Trade and Economic Development and interested county Associated Development Organiza-



## CINTRAFOR Publications

| TITLE   | AUTHOR(S)  | COST    |
|---|--|---------|
| <i>A Guide to Available Literature:<br/>International Trade in Forest Products</i>  | Compiled by Patricia Dowd  | \$1.25  |
| <i>A Spatial Equilibrium Model<br/>of African-European Trade in Tropical Logs<br/>and Sawnwood</i>  | Adams, Darius M.   | NC      |
| <i>An Evaluation of Japanese Softwood<br/>Construction Lumber Grading Systems and<br/>their Implications for North American<br/>Export Lumber Producers</i>   | Briggs, David G., and Nathan Dickens                                     | \$4.75  |
| <i>Export Potential for Charcoal Made from<br/>Low Grade Alaskan Hardwood and Softwoods</i>   | Schreuder, Gerard F., Thomas R. Waggener,<br>Michael P. Clasby           | \$2.00  |
| <i>Indonesia Forest Products Sector and<br/>Trade Profile</i>   | Schreuder, Gerard F., and Richard P. Vlosky                              | \$3.75  |
| <i>INTRADATA User Manual</i>  | Vlosky, Richard P.   | \$5.00  |
| <i>INTRADATA Variable Dictionary</i>  | Vlosky, Richard P.   | \$10.00 |
| <i>Introduction to INTRADATA 3 Diskette<br/>Tutorial Set</i>  | Vlosky, Richard P.   | \$4.00  |
| <i>Japanese Trade Mission Report</i>  | Waggener, Thomas R., and David B. Thorud                                 | \$1.00  |
| <i>Overview Washington State Forest<br/>Products Industry and International<br/>Trade</i>   | Bagger, Daniel W., Thomas R. Waggener                                    | \$1.50  |
| <i>Pacific Rim Market Profile Forest<br/>Products Trade by Country</i>  | Vlosky, Richard P.   | \$4.25  |
| <i>The History of North American West Coast<br/>Log Exports and a Comment on the Future<br/>of Log Exports from Alaska</i>  | Vlosky, Richard P., and Jay Gruenfeld                                    | \$ .50  |
| <i>The Implications for North American<br/>Exporters of Softwood Lumber Stress<br/>Grading in Europe with Particular<br/>Emphasis on British Stress Grades and<br/>the Economic Commission for Europe (ECE)<br/>Stress Grades</i> | Briggs, David G., and Nathan Dickens                                     | \$5.50  |
| <i>The Role of Exchange Rates in Canadian—<br/>U.S. Lumber Trade</i>  | Adams, Darius M., with Bruce A. McCarl, and<br>Lalehrokh Homayounfarrokh | \$4.25  |
| <i>Wood Products as a Worldwide Commodity</i>   | Waggener, Thomas R., and Richard P. Vlosky                               | \$4.75  |
| <i>World Trade in Forest Products 1<br/>(Proceedings of the first International<br/>Symposium on World Trade in Forest<br/>Products)</i>  | Edited by J. S. Bethel   | \$40.00 |
| <i>World Trade in Forest Products 2<br/>(Proceedings of the second International<br/>Symposium on World Trade in Forest<br/>Products)</i>   | Edited by Gerard F. Schreuder  | \$40.00 |



If you would be interested in being placed on CINTRAFOR's mailing list or would like to receive information about upcoming conferences and seminars, please fill in the form below:

Name \_\_\_\_\_

Position/Title \_\_\_\_\_

Company \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ ZIP Code \_\_\_\_\_

Telephone ( ) \_\_\_\_\_

Please check those items you would be interested in receiving:

- Upcoming Seminars/Symposiums     
  INTRADATA Information/Updates (CINTRAFOR Data bank)     
  CINTRAFOR Information Packet  
 Newsletter     
  Other \_\_\_\_\_

**CINTRAFOR Publication Order Form**

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**Return this form to:**

CINTRAFOR, College of Forest Resources, AR-10, University of Washington, Seattle, WA 98195,  
 Telephone (206) 543-8684

tions (ADOs). Each interested ADO unit has nominated a forest products coordinator. The primary objective of this cooperative effort is to establish a mechanism to examine the issues and opportunities confronting the forest product industry, and to address the circumstances and actions taking place within local communities and counties. It is the desire of CINTRAFOR to keep the program effort focused on most important issues and to identify governmental priorities most likely to have an impact in concert with state and local development efforts.

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### **Research Associate/ Forest Products Trade Modeling**

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Dr. Peter Cardellicchio recently has been appointed as full-time research associate with CINTRAFOR. He joins CINTRAFOR's efforts to expand work on forest products trade modeling. This includes work with the IIASA global trade model as well as cooperative activities with the U.S. Forest Service, the Canadian government, and the forest products industry.

Dr. Cardellicchio recently received his Ph.D. degree from Yale University, and has a B.A. in economics from Harvard. In his doctoral thesis, he developed a model of overrun and capital utilization in the softwood lumber industry. He has contributed a chapter on the use of production models in forest sector analysis to the IIASA book on forestry modeling.

In addition to his formal education, Dr. Cardellicchio has extensive experience in applied forest economics and market modeling. Prior to attending Yale, he worked for the transportation and forest product divisions of Data Resources, Inc. (DRI). He developed some key components of DRI's FORSIM model, a well-known econometric model of the North American softwood lumber and plywood indus-

tries. While at DRI, he also initiated their research into North American forest products trade with Pacific Rim countries. At Yale, he collaborated with Dr. Clark Binkley to develop an econometric model of the U.S.\* hardwood lumber industry.

CINTRAFOR welcomes Dr. Cardellicchio and the wealth of knowledge and experience he brings with him.

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### **Forest Products Trade Reference Materials**

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As a part of its ongoing responsibilities to monitor international markets and to disseminate market and technical information, CINTRAFOR has developed a coordinated reference service in cooperation with the University of Washington library system. Current literature, including reports, newsletters, and trade statistics, are maintained in the CINTRAFOR office and are available for public use. A "Guide to Available Literature: International Trade in Forest Products" has been published by CINTRAFOR. This reference guide identifies relevant materials in the Forest Resources and Business Administration libraries as well as the CINTRAFOR files. See the related information in this newsletter regarding ordering this guide and other CINTRAFOR publications.

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### **International Trade Symposium March 18–20, 1987**

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The third international symposium will be held March 18–20, 1987, and is sponsored by the Center for International Trade in Forest Products (CINTRAFOR), College of Forest Resources. CINTRAFOR has as a goal the responsibility to collect, analyze, and disseminate information pertaining to the international trade of wood and paper products.

This third international symposium of CINTRAFOR will continue to provide a forum for the international interchange of information on important topics in forest products world trade.

In keeping with the theme of the previous symposia, updated information dealing with international markets and trends in specific regions or countries will be presented. In addition, particularly important policy topics related to forest products trade will be addressed. A balance will be struck in the program between a global, or "macro," viewpoint and detailed "micro" analysis.

The symposium is designed for those interested in obtaining current understanding of the trends and major policy issues pertaining to the world trade of solid-wood products. Three general sessions will be developed under the following headings: (1) Trade Actions and Reactions, (2) Technical Considerations: Improvements or Impediments, and (3) Tropical Countries. An important consideration of the potential participant should also be the opportunity for meeting other professionals working in the international trade arena.

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### **The Pacific Basin Housing Conference and Exhibition, Nov. 9–12, 1986**

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Plans are under way for a major international housing conference to expand trade relations and meet growing housing needs in Pacific Rim nations cosponsored by the U.S. departments of Agriculture and Commerce, the U.S. Trade and Development Program, the state of Washington's Evergreen Partnership, CINTRAFOR, and the state of Oregon's Department of Forestry. The conference hosts are working with Northwest wood products industry officials to present this

unique cooperative event. Housing ministers and delegations from the People's Republic of China, South Korea, Papua New Guinea, Sri Lanka, Japan, India, and the Philippines have been invited. Each of these countries presently has a major projected housing shortage. The conference goal is to establish a working relationship for the transfer of construction technology, building products, financing, and training to meet the housing needs of the Pacific Rim nations. This conference will be held November 9-12, 1986, in Portland, Oregon and Vancouver, Washington.

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### Trade Leads

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CINTRAFOR has initiated a subscription to "Trade Leads," a service provided to inform firms interested in current overseas market

opportunities for specific wood products. This service lists sales leads provided by the Foreign Agricultural Service based on agricultural counselors, attachés, and trade officers worldwide. Each trade lead identifies the particular location, commodity and product specification, shipping terms and conditions, and contact person. Trade leads are received daily as issued and are available for reference in the CINTRAFOR office.

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### CINTRAFOR Seminar Updates

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CINTRAFOR regularly sponsors seminars, symposiums, and workshops. These events are organized for the purpose of disseminating information on world trade in forest products. CINTRAFOR has had the

honor of hosting many distinguished visitors, including Arthur Hummel, former ambassador to China, and Dr. Ian Bourke, FAO fellow and research field leader from Rotorua, New Zealand. From time to time, CINTRAFOR has an opportunity to host foreign visiting groups from such countries as Pakistan, Japan, Yugoslavia, and China. Workshops, including a joint effort with the UW law school, "Barriers to the Trade of Timber and Wood Products," and the recent "Current Developments in Japanese Wood Architectural Construction" workshop with Yugi Noga, president of Issiki Architects and Partners, are periodically scheduled. Most of these programs are scheduled on the UW campus or in the Seattle area. If you would be interested in receiving notices of these seminars, please indicate on the enclosed form.



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