Russia’s Log Export Tariff and WTO Accession

By: John Simeone and Ivan Eastin, School of Environmental and Forest Sciences, University of Washington

Introduction
Russia’s endowment of natural resources is rarely debated. Russia was the world’s largest exporter of natural resources in 2008, with exports of USD 341.2 billion, which represented 9.1 percent of world natural resources trade (WTO 2010). Despite the fact that Russia contains the largest area of natural forests in the world, its current share in the trade of the world forest products is below 4 percent. “Forests occupy over half of the land of the country, but the share of the forest sector in the 2010 gross domestic product (GDP) was only 1.3 percent; in industrial production, 3.7 percent; in employment, 1 percent; and in export revenue, 2.4 percent” (UN FAO 2012). The Russian Federation’s intentions to support value-added processing by instituting an export tariff on roundwood in 2007 has been well documented (CINTRAFOR News Winter 2009). This article will review Russian softwood and hardwood market trends up to 2007 and the government’s justification for instituting export tariffs on roundwood, as well as discuss trends in domestic production from 2007 to 2011 to evaluate the short-term effectiveness of the log export tariff. Finally, this article will conclude by highlighting some of the direct effects that WTO accession has had on the log export tariff. Of particular focus is how this may affect Russia’s trade of forest products within the Pacific Rim region.

Forest Sector Trends up to 2007

Roundwood exports:
During the period 2001-2007, global log exports declined by 14.4 percent while Russian log exports increased by 36 percent. As a result, the Russian share of global log exports increased from 21.4 percent in 2001 to 32.8 percent in 2007. Russian exports of roundwood peaked at 51 million cubic meters in 2006. In the same year, imports of Russian softwood logs represented 91.9 percent of total Chinese softwood log imports, 38.9 percent of Japanese softwood log imports, 24 percent of South Korean imports, 91.9 percent of total Chinese softwood log imports, and 74.5 percent of Finnish softwood log imports (Table 1).

Table 1. Major destinations for Russian softwood log exports (cubic meters).

<table>
<thead>
<tr>
<th>Russian softwood log exports</th>
<th>2001</th>
<th>2002</th>
<th>2003</th>
<th>2004</th>
<th>2005</th>
<th>2006</th>
<th>2007</th>
</tr>
</thead>
<tbody>
<tr>
<td>Softwood Total</td>
<td>29,524,993</td>
<td>28,309,665</td>
<td>27,667,734</td>
<td>31,078,046</td>
<td>34,309,665</td>
<td>37,195,326</td>
<td>36,415,182</td>
</tr>
<tr>
<td>China</td>
<td>9,640,210</td>
<td>12,860,826</td>
<td>12,285,199</td>
<td>13,245,657</td>
<td>16,298,962</td>
<td>19,051,215</td>
<td>23,049,945</td>
</tr>
<tr>
<td>Finland</td>
<td>4,851,867</td>
<td>5,458,677</td>
<td>5,284,514</td>
<td>5,514,956</td>
<td>6,907,796</td>
<td>5,811,051</td>
<td>3,733,609</td>
</tr>
<tr>
<td>Japan</td>
<td>8,368,293</td>
<td>4,533,564</td>
<td>4,701,822</td>
<td>5,637,715</td>
<td>4,553,876</td>
<td>5,094,752</td>
<td>4,376,285</td>
</tr>
<tr>
<td>S. Korea</td>
<td>2,273,866</td>
<td>1,572,728</td>
<td>1,509,187</td>
<td>1,593,686</td>
<td>1,733,416</td>
<td>1,974,156</td>
<td>1,224,245</td>
</tr>
<tr>
<td>Sweden</td>
<td>1,681,813</td>
<td>1,449,060</td>
<td>1,386,941</td>
<td>1,456,914</td>
<td>899,346</td>
<td>584,843</td>
<td>369,940</td>
</tr>
<tr>
<td>Estonia</td>
<td>458,173</td>
<td>456,919</td>
<td>778,111</td>
<td>1,303,122</td>
<td>1,277,779</td>
<td>1,444,414</td>
<td>989,904</td>
</tr>
<tr>
<td>Turkey</td>
<td>429,058</td>
<td>453,608</td>
<td>522,323</td>
<td>882,296</td>
<td>1,087,972</td>
<td>1,251,416</td>
<td>820,595</td>
</tr>
<tr>
<td>Total log exports</td>
<td>37,562,542</td>
<td>36,659,062</td>
<td>36,921,235</td>
<td>41,389,639</td>
<td>47,945,184</td>
<td>51,080,881</td>
<td>49,291,371</td>
</tr>
</tbody>
</table>

Source: (UN Food and Agriculture Organization 2008; Global Trade Atlas 2008)

Russia’s Tariff continued on page 3

Lumber exports:
While hardwood logs comprised 28.5 percent of total Russian log exports, hardwood lumber represented just 3 percent of total lumber exports in 2007. The ratio of hardwood lumber exports to total lumber exports declined steadily from 5.1 percent in 1998 to 3 percent in 2007, although the volume of hardwood lumber exports increased from 293,000 cubic meters in 1997 to 480,000 cubic meters in 2007. In contrast, softwood lumber exports increased rapidly, jumping from 4.6 million cubic meters in 1998 to 16.8 million cubic meters in 2007.

Wood-based panel exports:
Russian total exports of wood-based panels displayed strong growth through 2007. Wood-based panel exports were dominated by plywood, although a drop in plywood exports in 2007 caused the share of plywood in total wood-based panel exports to drop from 68 percent in 2006 to 61 percent in 2007. However, exports of both particleboard and fiberboard continued to grow through 2007. While fiberboard exports grew by just 4.5 percent between 2006 and 2007, particleboard exports jumped by 62 percent over the same period. The 4.7 percent drop in Russian plywood exports in 2007 came as global exports of plywood increased by 3.3 percent, suggesting that Russian plywood had become less competitive in global markets, although strong domestic demand within the construction sector also contributed to the decline in plywood exports. In the same year, particleboard exports jumped by 62 percent over the same period.
The forestry and wood products manufacturing sectors have always played an important role in the economy of Washington State. This is particularly true in rural timber-dependent communities and Native American communities, where employment within the forest products sector is often a major source of family wage jobs. In the state of Washington the forest products sector provided over 25,000 jobs, generated approximately $14.5 billion in gross business revenues and paid out over $1.5 billion in wages in 2011. However, continued weak domestic demand for wood products as a result of the 2006 financial crisis has devastated the forest products industry in Washington and across the US. In response, forest products manufacturers have increasingly looked offshore to supplement weak domestic demand, particularly those in Washington. Washington remains the largest exporter of forest products in the US, representing over 17% of total US wood exports in 2012 and the forest products industry is the fourth largest export sector in Washington. 2012 has been a dramatic year for the forest products industry in Washington State, and as we near the end of the year, it is useful to take the time to consider how the state has performed. In this quarter’s Director’s Notes, I provide an overview of the projected trade data for Washington State (based on actual exports through September 2012). Next quarter’s Notes will offer a more detailed analysis of the trade statistics for Washington State on a port by port basis.

Exports of wood products from Washington State were down sharply in 2012 (-22.9%), primarily as a result of a sharp decline in wood imports by China (-6.1% through October). However, since the start of the economic crisis in the US, Washington state has seen its exports increase substantially (+64.7%) and its share of US exports has increased from 12.2% in 2006 to 17.2% in 2012. Washington remains the largest exporter of wood products in the US by a large margin, with the second largest exporter, Oregon, having a market share of just 7.6% of total US exports. Washington’s wood exports are primarily targeted towards three markets, with 84% of total exports going to Japan (33.5% export market share), China (26.3%) and Canada (24%). This mix of markets has changed little (with the singular exception of China) since the start of the financial crisis in 2006, when 52% of Washington’s total wood exports went to Japan, 5.7% went to China and 27.3% went to Canada (Table 1). Clearly China has become a much more important trading partner over the past six years, increasing its imports from Washington by almost 700% while Japanese imports of wood from Washington have increased a more modest +6.3%. In 2012, Japanese imports of wood products from Washington are projected to total $443,000, followed by China ($348,000) and Canada ($318,000).

The overall mix of wood products exported from Washington State has changed slightly since 2006, with the share of logs dropping from 54% to 50% of total wood exports while lumber has increased from 21% to 27%. plywood has increased from 2.6% to 6.7% and builder’s joinery has dropped from 10.4% to 8.2%. The mix of wood products differs across the three major markets in 2012 with both China and Japan favoring logs and lumber while exports to Canada are mainly lumber, builder’s joinery, millwork and plywood (Table 2). However, the mix of products sent to Washington’s three major export markets has changed substantially since the start of the economic crisis in 2006, although in different ways. For example, the mix of exports going to Japan has seen a substantial shift from logs to a greater emphasis on lumber, while the opposite trend has occurred in China. Despite these shifts, both markets remain heavily oriented toward the import of logs over lumber, while imports of all other wood products remain small by comparison. The mix of wood products imported by Canada is more varied, with large amounts of lumber, builder’s joinery, millwork and plywood being shipped north.

In summary, the past six years has resulted in substantial changes for the forest products industry in Washington. Facing weak demand for their products in the US, Washington’s exporters have increasingly looked offshore, particularly to Asia, to supplement demand for their products. While 2012 looks to be a less-than-stellar year for exporters in Washington (and the rest of the US), a number of stimulus measures in China designed to speed up infrastructure projects and improve the competitiveness of Chinese wood exporters, should increase the demand for wood products, particularly from Washington, in China.

Table 1. Washington wood products exports, by country of destination. (US$)

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</thead>
<tbody>
<tr>
<td>Japan</td>
<td>$146,391</td>
<td>$354,967</td>
<td>$419,237</td>
<td>$331,746</td>
<td>$377,507</td>
<td>$421,012</td>
<td>$442,526</td>
<td>5.1%</td>
</tr>
<tr>
<td>China</td>
<td>$45,517</td>
<td>$49,788</td>
<td>$47,962</td>
<td>$82,272</td>
<td>$392,512</td>
<td>$717,517</td>
<td>$347,924</td>
<td>-51.5%</td>
</tr>
<tr>
<td>Canada</td>
<td>$219,169</td>
<td>$243,003</td>
<td>$261,087</td>
<td>$199,078</td>
<td>$277,816</td>
<td>$308,761</td>
<td>$317,746</td>
<td>2.9%</td>
</tr>
<tr>
<td>S. Korea</td>
<td>$38,878</td>
<td>$101,648</td>
<td>$135,384</td>
<td>$136,195</td>
<td>$116,764</td>
<td>$125,960</td>
<td>$83,650</td>
<td>-33.6%</td>
</tr>
</tbody>
</table>

Table 2. The export mix of products has changed substantially since 2006.

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>Logs</td>
<td>90.5%</td>
<td>71.9%</td>
<td>11.8%</td>
<td>78.6%</td>
<td>2.7%</td>
<td>2.2%</td>
</tr>
<tr>
<td>Lumber</td>
<td>5.4%</td>
<td>24.9%</td>
<td>78.2%</td>
<td>20.1%</td>
<td>22.2</td>
<td>29.3</td>
</tr>
<tr>
<td>Builder Joinery</td>
<td>3.1%</td>
<td>2.5%</td>
<td>2.1</td>
<td>0.3</td>
<td>28.0%</td>
<td>26.7%</td>
</tr>
<tr>
<td>Veneer Sheets</td>
<td>0.0%</td>
<td>0.0%</td>
<td>5.0%</td>
<td>0.1%</td>
<td>4.4%</td>
<td>1.2%</td>
</tr>
<tr>
<td>Plywood</td>
<td>0.1%</td>
<td>0.2%</td>
<td>0.2%</td>
<td>1.1%</td>
<td>8.6%</td>
<td>12.2%</td>
</tr>
<tr>
<td>Millwork</td>
<td>0.1%</td>
<td>0.6%</td>
<td>2.4%</td>
<td>0.0%</td>
<td>15.3%</td>
<td>12.2%</td>
</tr>
</tbody>
</table>
The wood processing sector. In 2007, in addition to passing a series of policies designed to promote the development of (Russian Federation 2006).

One of them, we will fail to resolve the problem as a whole.” Stated Putin, “and if we fail to deal with these issues all interlinked,” and [Russia is] doing little to develop our own wood products and timber processing industry” (Russian Federation 2006).

In order to make the forestry sector and timber industry more competitive, Putin called for the prioritization of: (1) the legal foundation for forest sector development via the passing of the new, more effective, Forest Code; (2) structural change in the sector by helping small companies transition from logging to value-added processing; and (3) economic conditions that would make processing attractive to investors. “These issues are all interlinked,” stated Putin, “and if we fail to deal with one of them, we will fail to resolve the problem as a whole” (Russian Federation 2006).

Beginning in 2007, the Russian government implemented a series of policies designed to promote the development of the wood processing sector. In 2007, in addition to passing a new Forest Code, Russia announced a series of log export tariffs designed to reduce the export of roundwood. In 2008, the Ministry of Industry and Trade adopted an initiative titled “Strategy for the Development of the Forest Complex to 2020,” which formally enumerated the policies that Russia would enact to encourage the development of a domestic processing industry. One initiative that was stressed was a mechanism of subsidizing timber processing development as a way to attract investment, for priority investment projects (MINPROMTORG 2008).

An export tariff on unprocessed timber, or roundwood, was announced on February 5, 2007 by the Russian government. This policy levied ad valorem export tax on roundwood that would increase incrementally each year. By instituting an export tax on unprocessed wood, the Russian government intended to decrease exports of raw wood in order to increase its price abroad and lower its domestic price, thereby directing log sales into the domestic market.

Beginning on January 1, 2007, the Russian Federation’s tax on roundwood was set at 6.5%; on July 1, 2007 the tax was increased to 20% and on April 1, 2008, the tax again increased to 25%. While the Russian government’s goal had been to increase the export tax rate to 80% by January 1, 2009, early November 2008 the Russian authorities, citing the rapidly deteriorating global financial crisis as well as in response to pressure from Scandinavian countries that were heavily dependent on Russian logs, announced that they would delay the implementation of the 80% log export tax indefinitely.

Where lies the competitive advantage?

Before looking at domestic production trends in Russia between 2007 and 2011, one needs to consider whether Russia possessed a competitive advantage in the value-added manufacturing of wood products. “Competitiveness in economics usually refers to the ability of countries, industries, or firms to prosper in certain market conditions. It is an elusive concept, with few clear indicators” (Makela 2009) and an industry’s competitiveness can be attributable to many domestic and international factors. The following discussion will touch upon both aspects of competitiveness.

Ignoring this important issue can lead to the provision of expensive subsidies to manufacturers and result in the disastrous over-development of the wood processing sector (e.g. Indonesia and plywood). It has been repeatedly demonstrated that lacking any clear basis for developing a competitive advantage in wood processing generally results in an inefficient wood processing sector that is unable to compete internationally without the continued provision of subsidies over the long-term. This discussion also addresses the issue of whether Russia can indeed develop an internationally competitive wood processing sector in the future.

Domestically, there are several factors that need to be considered including the cost, quality and availability of labor, cost of capital, hosting conditions (including the perception of risk), presence of supporting industries and exchange rates. For example, Russia is expected to experience a decline in the availability of working age labor in the future, particularly in the timber growing regions (including the Urals, Siberia and the Russian Far East) where the decline in workers will exceed the national average (CIBC 2007). These three regions which contain 54% of the economically available timber harvest, have an under-developed wood processing sector capable of processing about 10% of the actual harvest and less than 5% of the economically available harvest. Attracting and retaining qualified workers in these regions poses a challenge for the Russian government, particularly in the areas of sales/marketing and technical managers.

Related to the labor issue and the underdeveloped wood processing industry, is the absence of related and supporting...
industries. Operating a sawmill requires more than simply building and staffing the sawmill. It also requires the presence of related industries to purchase the mill residues, such as a pulp mill or a bio-energy facility (facilities that require a substantially larger capital investment than sawmills). Similarly, having a large, competitive logging industry and adequate transportation infrastructure is critical to ensuring an adequate supply of competitively priced logs. A transparent and fair investment climate is important in order to attract capital investment. Finally, transparency of forest ownership, risk of expropriation, transparency of governance and the endemic nature of corruption are all of concern to potential investors.

The economic indicators most often used to assess export-oriented competitiveness “do little to measure the potential competitiveness of a country, but rather assume that the potential has already been realized and is therefore evident in its current export statistics” (Makela 2009). Recognizing this, Makela (2009) uses Russian export data to make some rudimentary observations regarding what Russian wood products currently have the highest revealed comparative advantage (RCA). Makela (2009) finds that “the most competitive products in the Russian forest sector are products that require little processing” with untreated coniferous wood in the rough and chemical wood pulp being the most competitive products (Table 2) and concludes by noting, that:

“While Russia’s forest products are not particularly developed, as could be seen from their RCA indicators, Russia had not been ‘left behind’ in terms of modernization either. Russia’s export basket represents the type of export basket a country in that development state would export. This does not mean that trade policy could not be used to improve Russia’s situation, but it does mean that Russia’s current level of export sophistication is by no means unusually low.”

“Russia has so far focused on the low end processing part of the forest industry: roundwood, sawnwood, and pulp. It is now attempting to transform its industry toward more value-added products, but it is a relevant question to ask whether this would necessarily even be desirable. The aim to develop production toward high levels of sophistication makes sense, particularly as Russia possesses vast natural resources and hence a natural advantage in the field. Still, the transition the industry currently faces may make a transition from raw materials to processed goods production unprofitable at least in the short term” (Makela 2009.)

Production and export trends from 2007 to 2011

The combined effects of the global financial crises in 2009 and Russia’s export tax on roundwood in early 2007 contributed to a drastic decline in Russia’s total roundwood exports—from 49.3 million m³ in 2007 to 21.9 million m³ in 2011. However, understanding the short-term effectiveness of the export tax can be helped by looking at domestic production and export trends since 2007; although, as Makela (2009) suggests, the short-term trends may not necessarily be indicative of the potential for long-term success.

Looking at production trends beginning in 2007, the dramatic decreases in production of all forest products between 2007 and 2009 is obvious. Most notable, and expected, is the plunge in total roundwood production (Figure 1). However, since 2009 roundwood production has been rising with the largest increases coming from the production of coniferous

![Figure 1. Domestic Production of Roundwood (FAOSTAT 2012)](image-url)
sawn logs and veneer logs. Domestic production of sawnwood (Figure 2) also slumped between 2007 and 2009, but began an upward trend again in 2010 due to an increase in coniferous sawnwood production capacity, increased domestic demand and a rapid expansion in lumber exports (up 380% between 2007 and 2011). Coniferous sawnwood production in 2011 exceeded 29 million m³, a record production volume. Non-coniferous sawnwood production remains low, reaching just 2.6 million m³ in 2011. Production of wood-based panels fell to 8.6 million m³ in 2009 (Figure 3), before resuming its rapid growth trajectory between 2009-2011. The largest production gains occurred with particle board, followed by plywood and fiberboard.

Lower domestic log prices would be expected to encourage an increase in domestic production of secondary wood products while reduced log exports and lower prices should translate into an increased demand for Russian processed wood products in international markets. As discussed earlier, short-term production trends reveal that the production of wood products is growing, although this growth is skewed towards the production of low-value-added products. In contrast, Russian wood products' exports present a mixed picture (Figure 4). The total export value of wood products declined from $8.8 billion in 2007 to $5.5 billion in 2009 largely due to a 49% drop in log exports and the impact of the global financial crisis. Between 2007 and 2011 the export value of all wood products decreased by 16.2%, while exports of value-added wood products increased by 16.8% to $5 billion in 2011. This trend was driven by increased exports of lumber (+12.4%), plywood (+20%) and veneer (+426%). It should be noted that much of the increased production of wood products was consumed domestically in response to large increases in infrastructure and construction spending.

**Russia’s WTO Accession**

On August 22, 2012 Russia officially became a member of the World Trade Organization (WTO). Russia’s accession to the WTO will affect the competitiveness of Russian timber in foreign markets, as well as change the incentive structure of the domestic timber industry and thereby impact the domestic market as well (Sheingauz and Antonova 2008). WTO membership requires Russia to reduce barriers to foreign investment, lower import and export tariffs, and should improve Russia’s access to international markets (Rutherford and Tarr 2010).

Following its accession into the WTO, Russia instituted an abrupt change of policy with respect to the log export tariff. Abandoning its goal of imposing an 80% log export tariff, Russia has now instituted an elaborate set of tax rates for roundwood exports and introduced volume tariff rate quotas (TRQs) for certain timber species. Two of these TRQs establish an in-quota duty rate of 13% for spruce (*Picea abies* Karst) and silver fir (*Abies alba* Mill) while red pine (*Pinus sylvestris* L.) will have an in-quota export duty rate of 15%. These duty rates, however, will continue to fall over the next several years as Russian moves to comply with the final bound rates (8% by 2015) as established in the WTO accession package. The official Russian newspaper, Rossiskaya Gazeta (2012), recently reported that all out-of-quota duty rates will be set at an unprecedented rate of 80%. In addition to the TRQs, the export tax rates for hardwood logs will be: 10% for poplar, 7% for birch, and 5% for aspen. The roundwood export tariff for all other species – including larch- remains at the current 25%. It is important to note that even many Russian authorities still remain uncertain about the full changes that are occurring within the forestry sector as a result of WTO accession and revisions to laws and export duty rates are still being discussed.

According to the quotas established at the time of Russia’s WTO accession, over 95% of the TRQ for spruce and fir logs (6.25 million m³) has been allocated to the EU with just 4.5% going to all other countries (Table 3). Based on the 2011 Russian log export statistics, spruce/fir log exports totaled just 10.3% of the total available TRQ volume, suggesting that Russia is looking to substantially increase these log exports in 2013. However, given the small volume of spruce/fir logs that were exported to both the EU and Asia in 2011, the large size of the current TRQ is expected to have little impact on either the European or Asian markets in 2013. In contrast, the majority (77.3%) of the 2013 red pine TRQ has been allocated to non-EU markets. In 2011, red pine exports represented 72.3% of the available TRQ for non-EU markets in contrast to 12.4% for EU markets. This could lead to adverse impacts on red pine imports by China and Japan where Russian red pine represented a sig-
significant portion of total softwood log imports totaling 26.8% and 3.5%, respectively, in 2011. For example, in 2011 China imported 8.4 million m$^3$ of red pine and 3.4 million m$^3$ larch from Russia while Japan imported 119,613 m$^3$ of red pine and 108,155 m$^3$ of larch. Under the new tariff system, the export tariff for red pine will fall from 25% to 15% while the export tariff for Russian larch will remain at 25%. The disparity in tariffs between red pine and larch could well encourage importers in China and Japan to increase their imports of red pine in order to take advantage of the lower tax rate. If this were to happen on a large scale, it could easily cause red pine exports to run up against the out-of quota limit, triggering a sudden jump in the export tariff for red pine from 15% to 80%. While the new TRQs have been set close to Russia’s 2006 log export volumes (which reached a record level), the Russian government has stated that new log export quotas for spruce, fir, and pine logs will be revised each year.

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Figure 4: Total Export Revenue of Forest Products (FPS) under HS 44. (Global Trade Atlas 2012)

Table 3: Projected Impact of the In-quota Duty in 2013 (Global Trade Atlas 2013)

| Lumped 13% TRQ for Spruce (Picea abies Karst.) and Silver Fir (Abies alba) |   |   |
|--------------------------|--------------------------|
| m$^3$ allotted for 2013 | % of Total TRQ | % of quota used (according to 2011 Russian Export Data) |
| Total lumped quota =     | 6,246,500 | 100.0 | 10.3 |
| To EU =                  | 5,960,600 | 95.4 | 10.7 |
| others =                 | 285,900   | 4.6  | 3.7  |

| 15% TRQ for Red Pine (Pinus sylvestris L.) |   |   |
|------------------------------------------|--------------------------|
| m$^3$ allotted for 2013 | % of Total TRQ | % of quota used (according to 2011 Russian Export Data) |
| Total quota =             | 16,038,200 | 100.0 | 58.7 |
| To EU =                   | 3,645,900  | 22.7  | 12.4 |
| others =                  | 12,392,300 | 77.3  | 72.3 |

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