



# Vanport Export Lumber Market Update

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WHY DOES EVERY PIECE OF LUMBER FOR JAPAN  
HAVE TO BE PERFECT AND BEAUTIFUL?



# 5% Off Grade is not Acceptable in many Export Markets



VANPORT

JAPAN

Changes in post and beam construction methods are reducing the needs for solid lumber and increasing the demand for engineered wood.



Solid Douglas Fir lumber is becoming a niche market and the hemlock market in Japan has nearly disappeared.































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M601















EVERY PIECE MUST BE 100% USABLE  
THIS IS THE COMPONENT -VS- COMMODITY MENTALITY





IN MANY  
EXPORT  
COUNTRIES,  
THE LUMBER  
IS USED IN  
EXPOSED  
APPLICATIONS



SOUTH KOREA



IN MANY EXPORT COUNTRIES, THE LUMBER IS PRIMARILY USED IN CONCRETE FORM APPLICATIONS



Not all markets use lumber for  
construction materials

Here are some examples



# CORE MATERIAL





# CORE MATERIAL





The largest usage of lumber in China is for concrete form applications.

# CONCRETE FORM



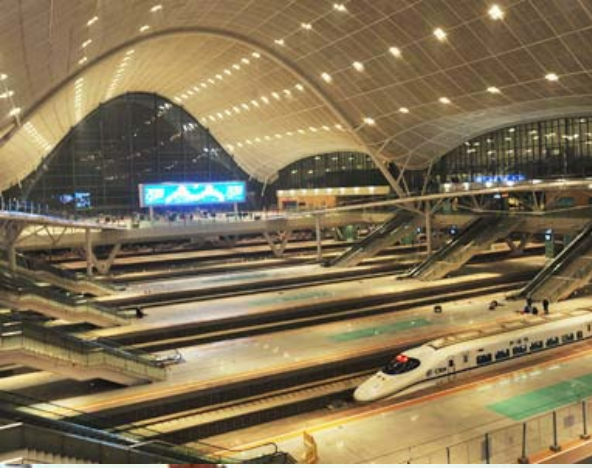






China's expansion of its railroad and highway system is one of the single largest construction projects taken on by a country since the US and the New Deal. Brought on by the global economic meltdown.

A \$1 trillion project.







China will have 86,000km of railway by the end of this year, making it second only to the United States, which has 260,000km. By 2012, the figure will increase to 110,000km, including 13,000km of high-speed tracks serving 42 passenger lines.



CHINA

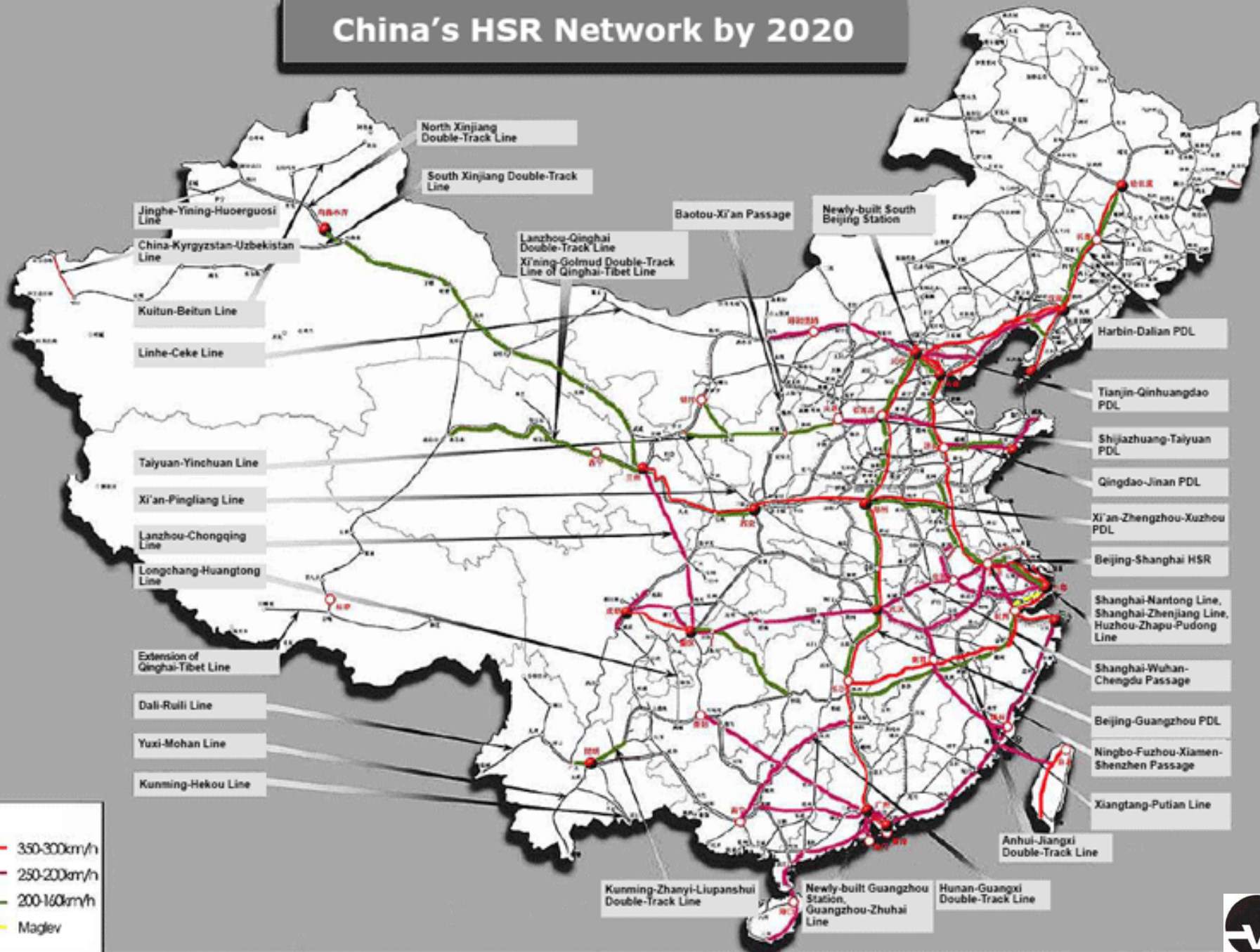
# CHINA

## High-Speed Rail

-  In Service
  -  Under Construction
  -  Planned
- 
-  300-350 kph (186-220 mph)
  -  200-250 kph (125-155 mph)



# China's HSR Network by 2020



# China's Ghost Cities



ORDOS, CHINA

# China's Ghost Cities



ORDOS, CHINA

# China's Ghost Cities



ORDOS, CHINA



# China's Ghost Cities



ORDOS, CHINA

# China's Ghost Cities



ORDOS, CHINA

# China's Ghost Cities



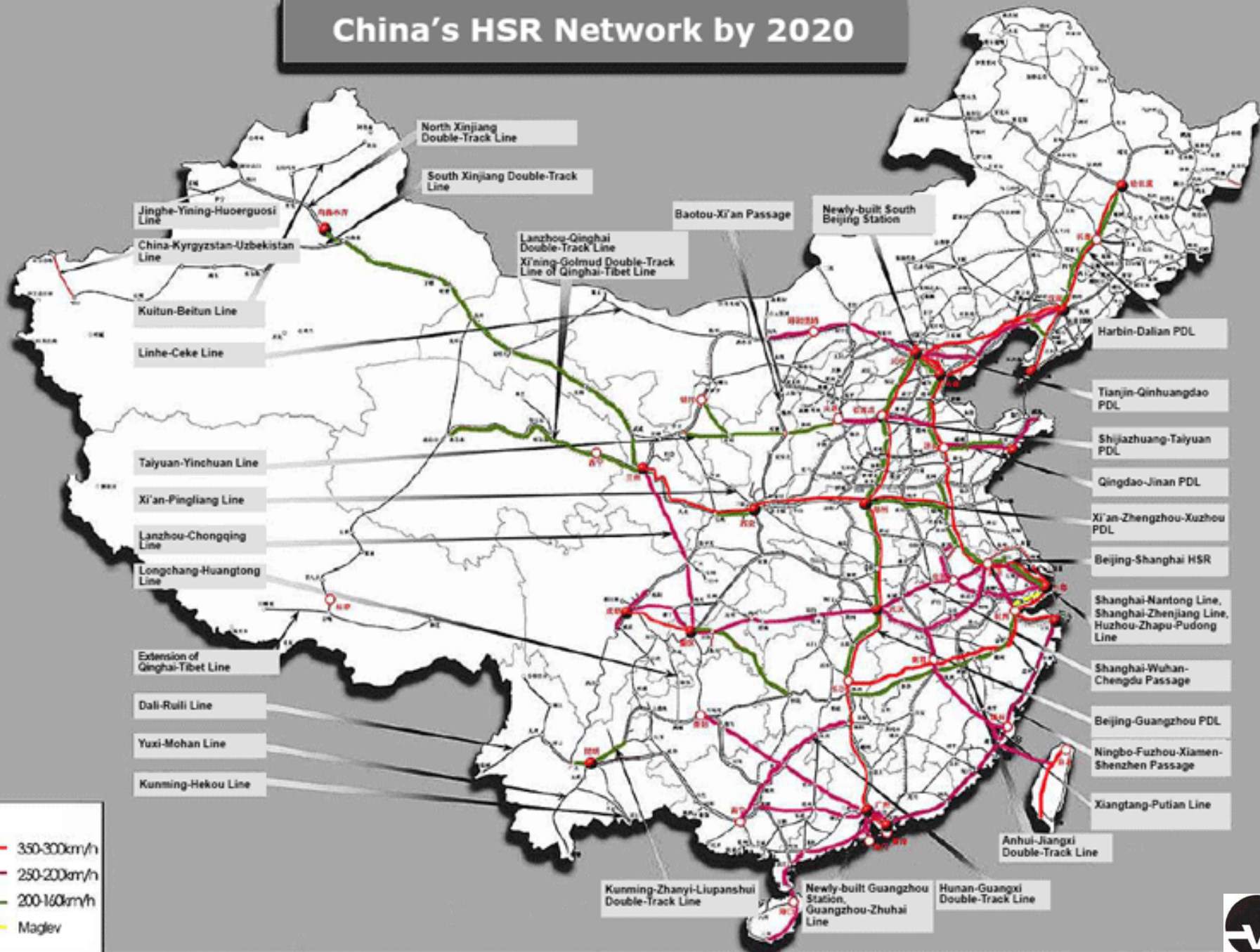
ORDOS, CHINA

# China's Ghost Cities



ORDOS, CHINA

# China's HSR Network by 2020





MULTIPLEX

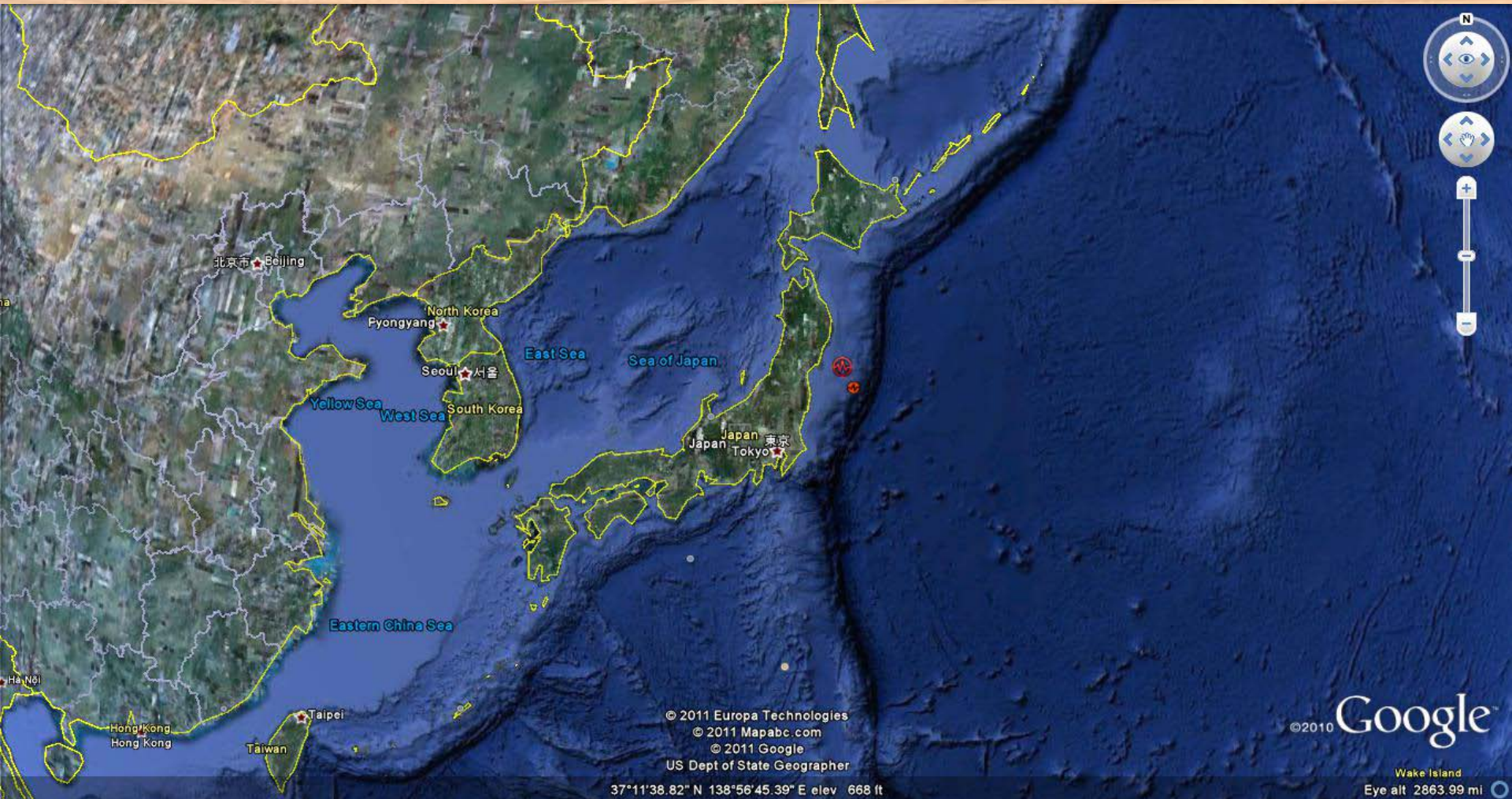




MR. J. J. J.



# Current Situation in Japan





AFP/GETTY IMAGES

JAPAN



AFP/GETTY IMAGES





The tsunami washed the entire log yard inventory into the city.



Seihoku Plywood Mill



Log yard is completely empty.

SEIHOKU ISHINOMAKI KOJO, ISHINOMAKI JAPAN  
(NORTH OF SENDAI)



JAPAN



JAPAN







JAPAN





JAPAN





JAPAN





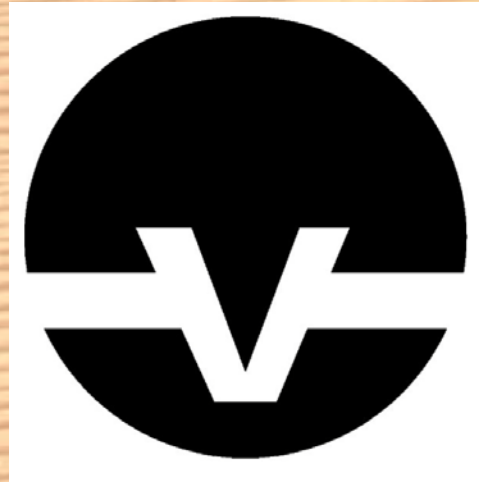






What is your goal in trying  
to service the export  
markets?





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