



INTERNATIONAL
TRADE
ADMINISTRATION

ADVANCING U.S. EXPORTS-BUILDING MATERIALS & WOOD TO GLOBAL MARKETS

International Wood Products Association

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Hotel Nikko

San Francisco, California

Presented by

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U.S. Department of Commerce



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Presentation Outline

1. Global Competitiveness of the U.S. Building Materials and Wood Industries.
2. Key Measures of U.S. Trade in Wood.
3. Leading Global Markets for U.S. Trade in Wood.
4. Ways We Can Partner With You.



Globally Competitive

Leading Markets and Total U.S. Building Product Exports (2016*)

Top Developed Economies		Top Developing Economies	
Canada	\$22.9 billion	Mexico	\$21.9 billion
EU	\$10.6 billion	China	\$7.0 billion
Japan	\$2.5 billion	Brazil	\$1.4 billion
Korea	\$1.7 billion	Saudi Arabia	\$1.2 billion
Australia	\$1.0 billion	India	\$672 million
Total:	\$38.7 billion	Total:	\$31.4 billion

Source: U.S. Department of Commerce, Bureau of Census, *Annualized, based on data for Jan-Oct/Nov 2016

- In 2016, U.S. Building Products exports - \$83 bill to more than 210 world markets.
46.6% sector exports went to the leading developed markets
37.8% went to the top developing markets.
- On a level playing field, the sector is competitive in developed, emerging, or any other international market.



U.S. Building Products

Total Annual U.S. Exports

(2015: \$87 billion, 2016*: \$83 ↓4.1%)

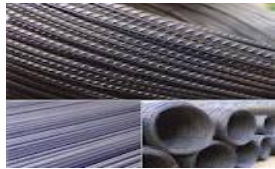


HVAC

2015: \$19.4 billion
2016: \$18.3 billion ↓5.5%

Appliances, Lighting, Electr.

2015: \$24.5 billion
2016: \$23.7 billion ↓3.3%



Non-ferrous Metal Products

2015: \$14.7 billion
2016: \$14.1 billion ↓4.3%

Iron & Steel

2015: \$8.9 billion
2016: \$8.2 billion ↓8.8%



Paint & Adhesives

2015: \$4.21 billion
2016: \$4.19 billion ↓0.5%

Wood

2015: \$8.35 billion
2016: \$8.36 billion ↑0.21%



Plumbing

2015: \$1.38 billion
2016: \$1.28 billion ↓7.6%

Insulation

2015: \$1.05 billion
2016: \$1.00 billion ↓4.5%

Concrete, Tile, Plasterboard

2015: \$1.03 billion
2016: \$1.02 billion ↓1.5%



Glass

2015: \$1.05 billion
2016: \$1.09 billion ↑3.8%

Doors & Windows

2015: \$819 million
2016: \$766 million ↓6.5%



Cement & Asphalt

2015: \$490 million
2016: \$409 million ↓16.4%



Stone

2015: \$229 million
2016: \$213 million ↓7.0%

Miscellaneous Other

2015: \$795 million
2016: \$821 million ↑3.3%



*Annualized based on Jan-Oct/Nov 2016 data

[Source: U.S. Census Bureau]

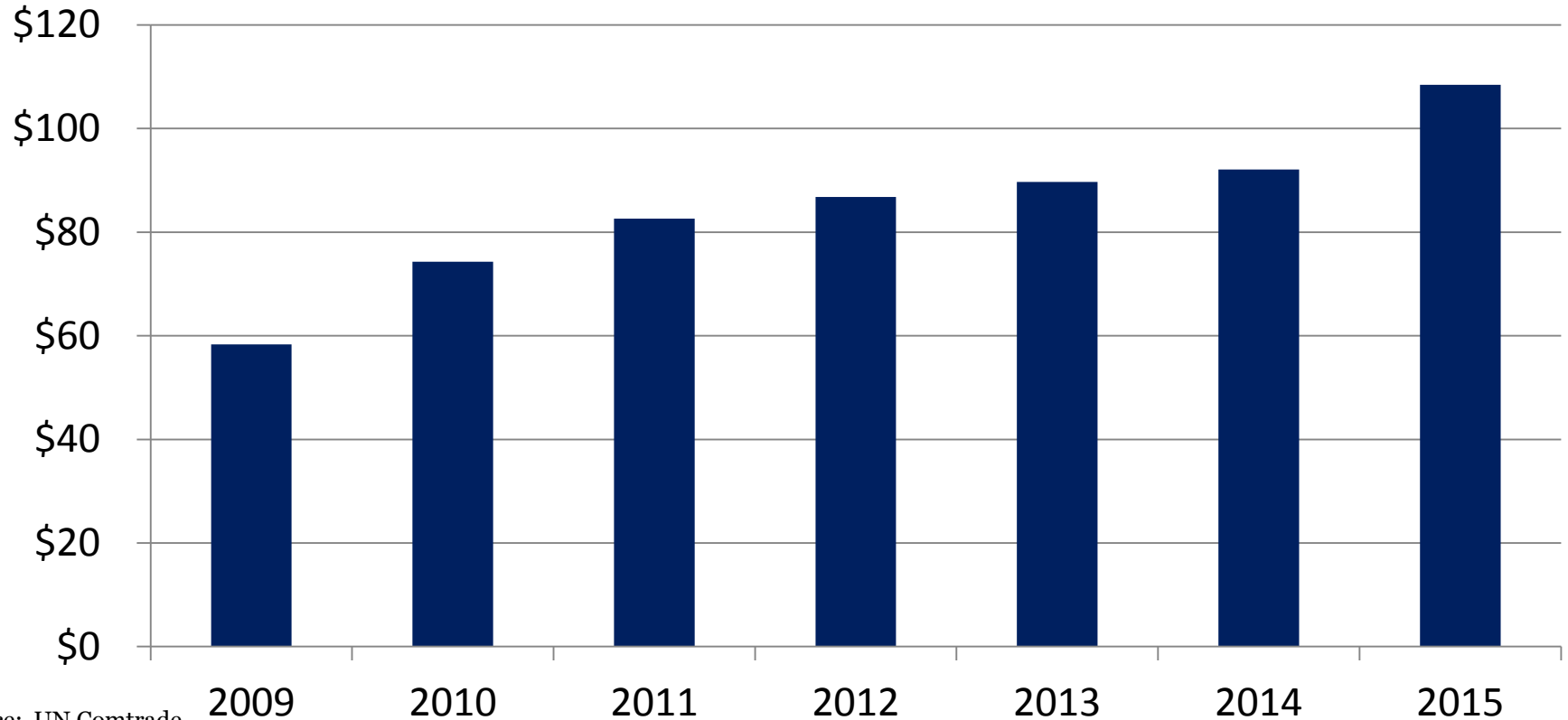


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World Import Trends: U.S. Building Products

From 2009-2015, world imports of U.S. building products grew from \$58 billion to \$108 billion

World Imports (\$ billions)



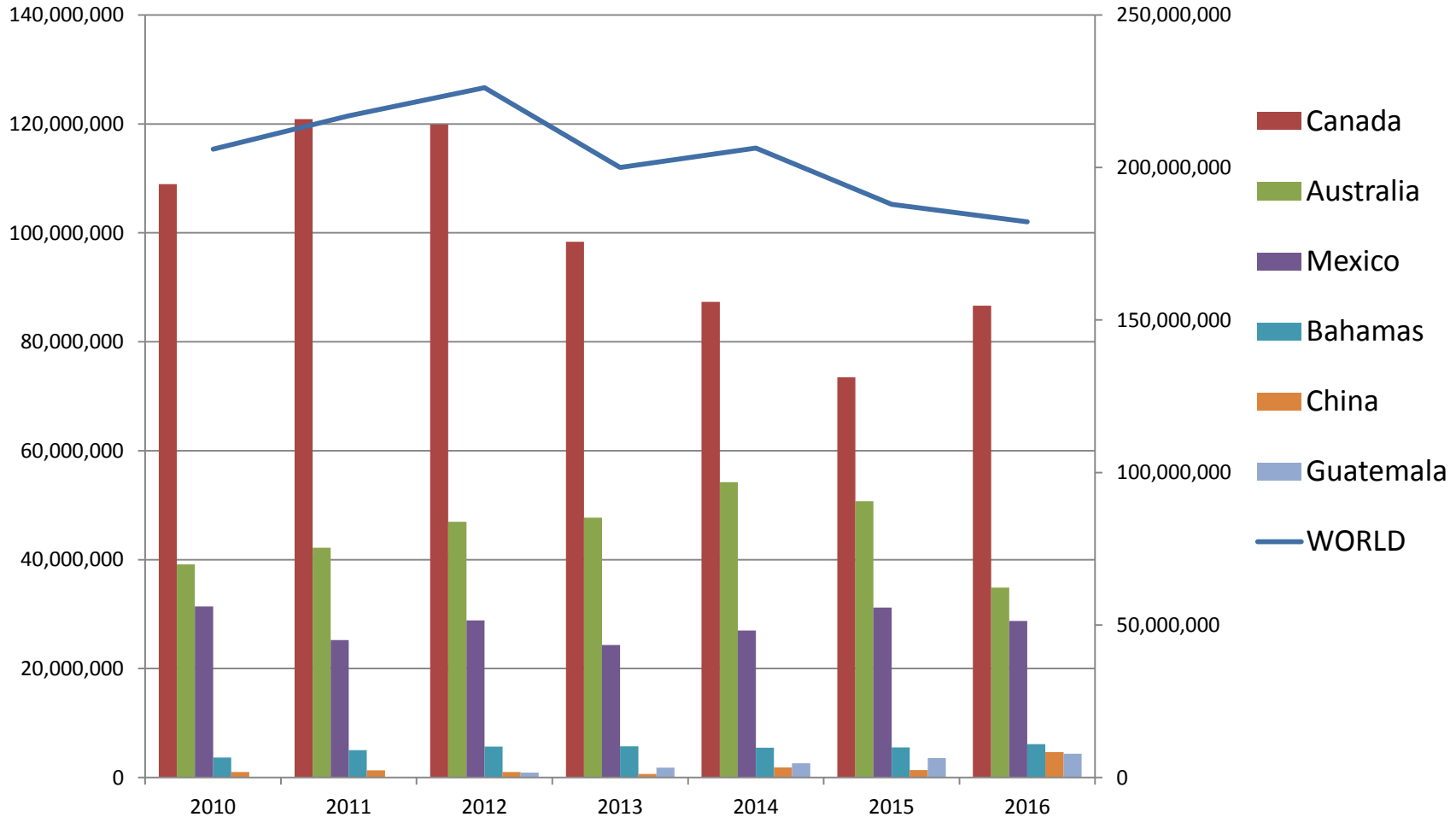


Global Demand Drivers—U.S. Building Product Exports

- **Global Construction Growth Trends**
 - Global construction output growth of 67% between 2010 and 2020; far exceeds global GDP growth.
 - Much of this growth is in top export markets where U.S. building products compete.
 - China expected to hold position of world's largest construction market through 2020.
- **Trends in Sustainable Construction**
 - Global trend toward green building is intensifying; emphasis on energy efficiency.
 - Governments continue to incentivize and mandate green building; private sector buy-in has increased dramatically.
 - Global recognition of lighting's core role in improving building energy efficiency.
- **Transformation of Energy Mix**
 - As economies work to transition away from established sources of electric power, there is an imperative to embrace all opportunities to reduce energy demand.
 - Global recognition of the demand buildings place on energy supplies.



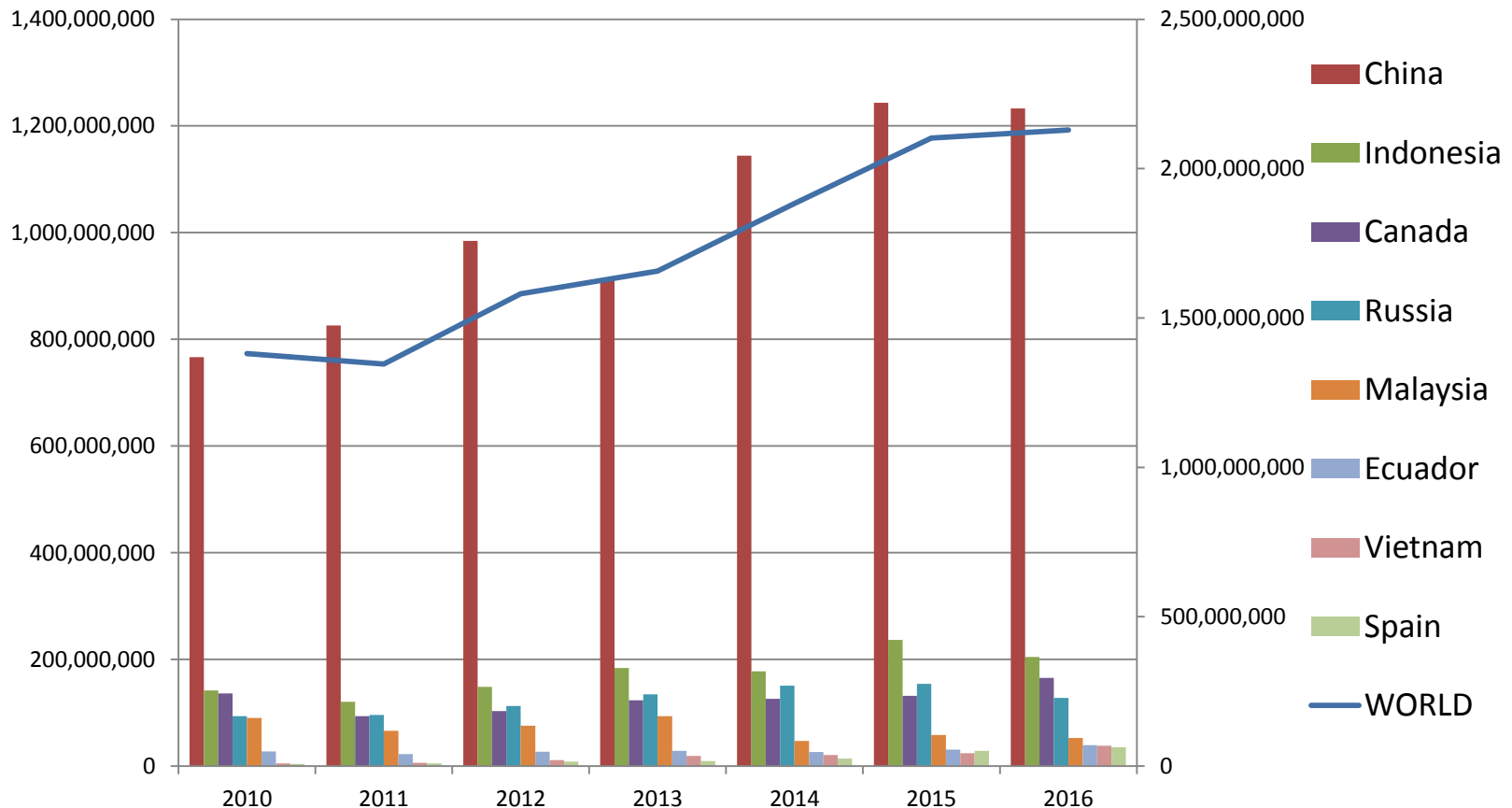
Top U.S. Export Markets Laminate Flooring – USD



**Note: Exports up 4.5 Mil
Jan-Feb YTD '16 - '17**



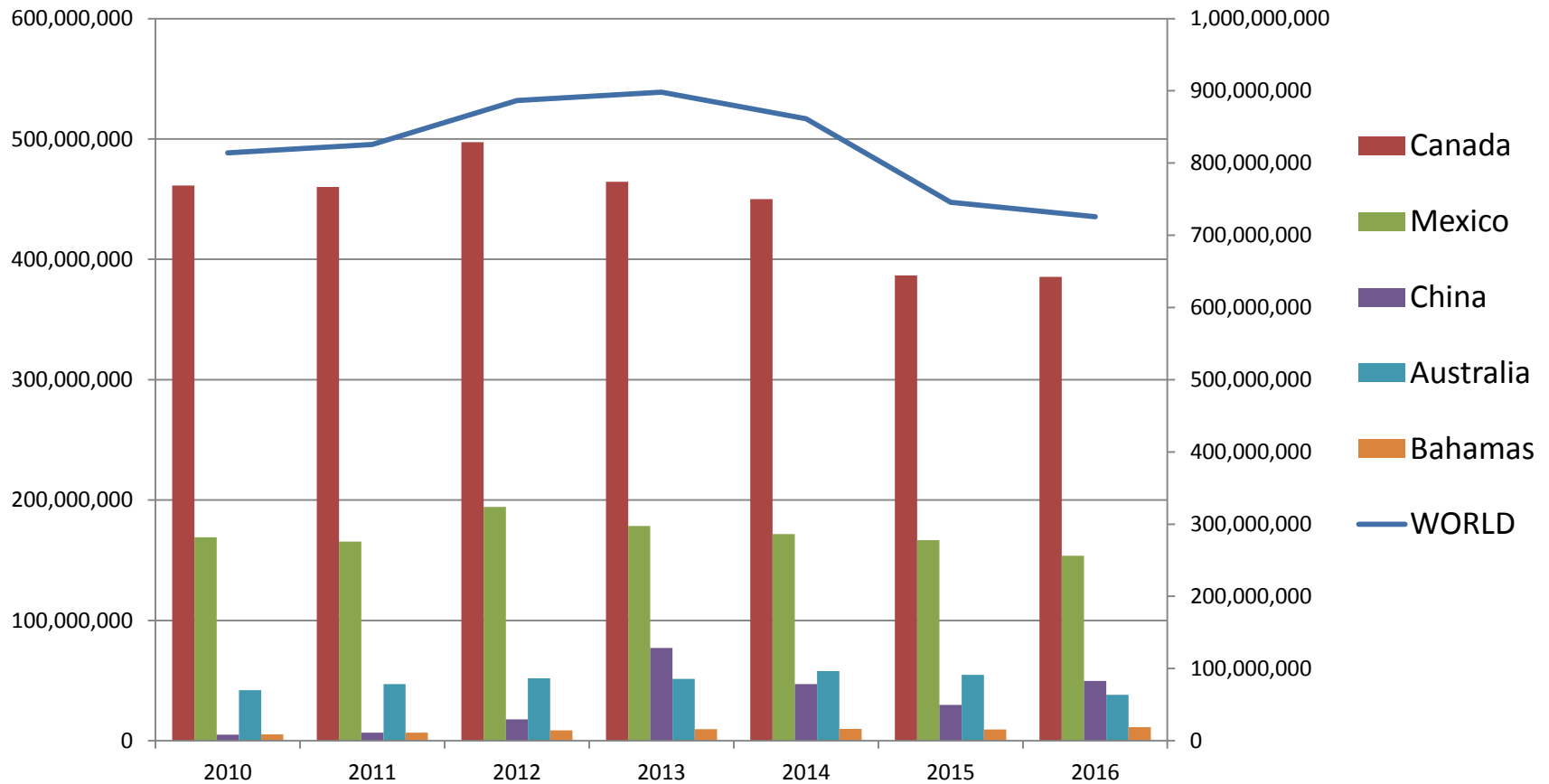
Top Laminate Flooring Countries Importing to U.S. – USD



**Note: Imports up nearly
68 Mil, Jan-Feb YTD '16 - '17**



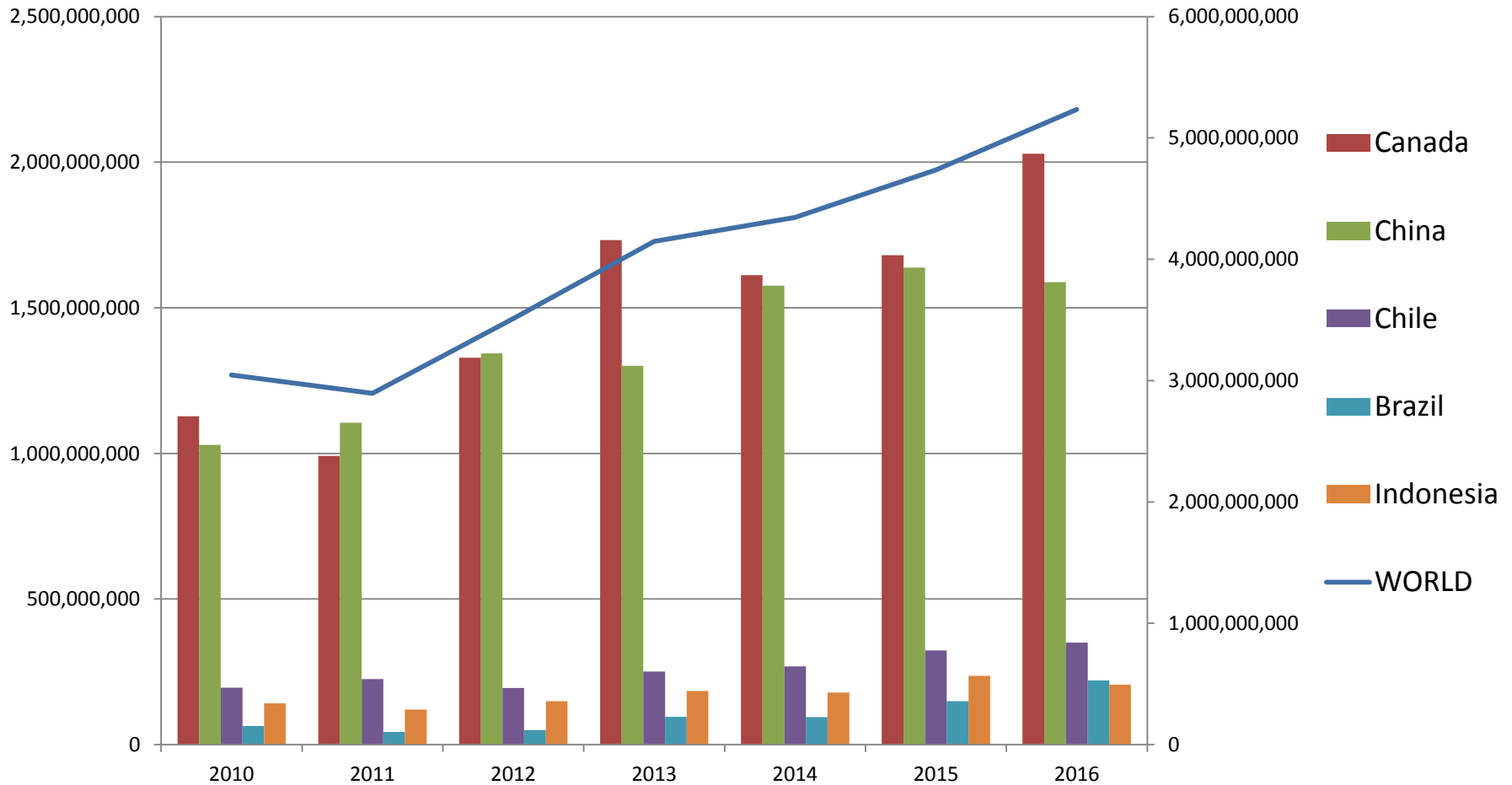
Top U.S. Exp. Markets Fiber/Particle Board, Plywood, OSB – USD



**Note: Exports up 10 Mil
Jan-Feb YTD '16 - '17**



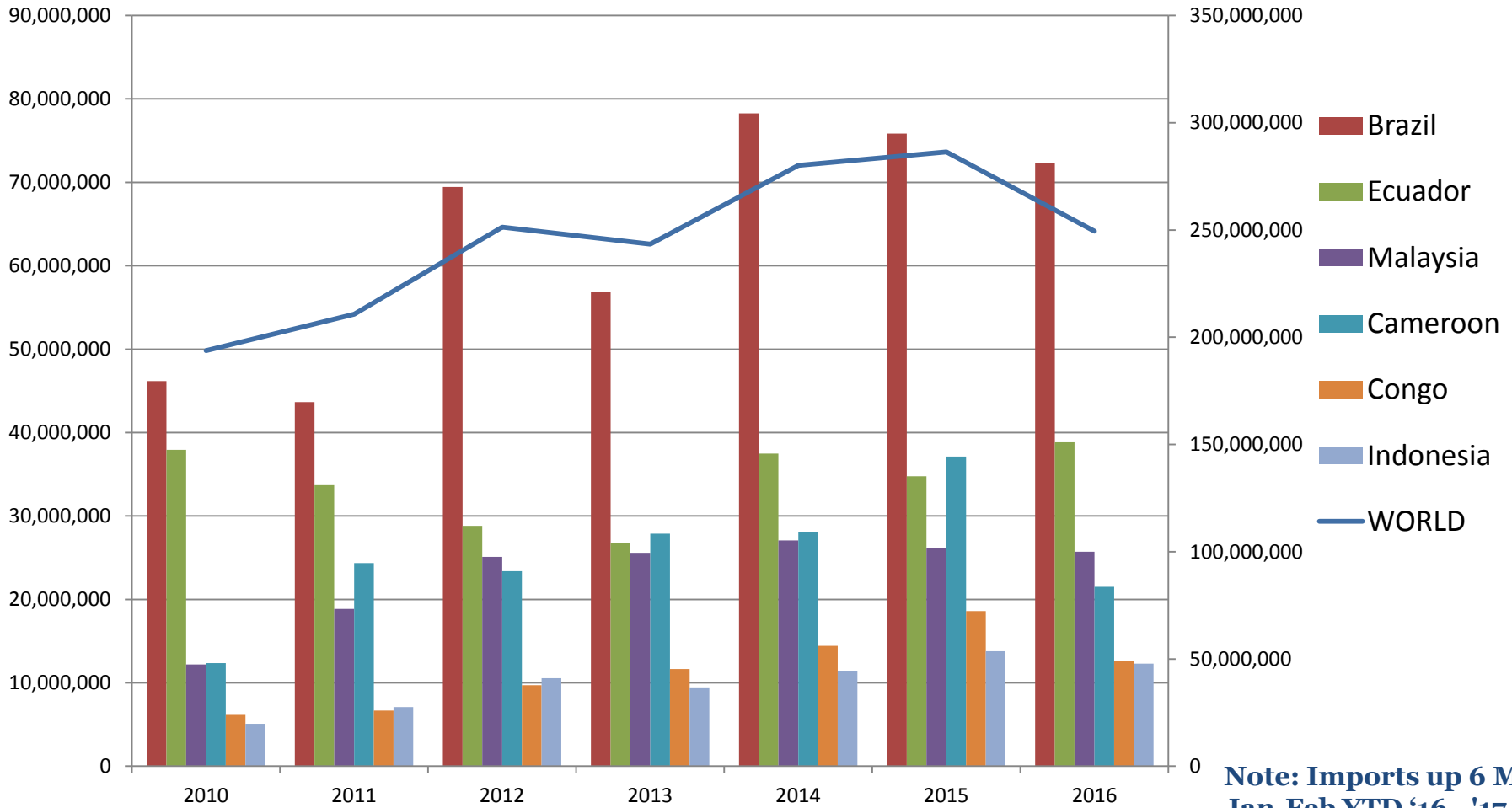
Top Fiber/Particle Board, Plywood, OSB Importers to U.S. – USD



**Note: Imports up nearly
163 Mil, Jan-Feb YTD '16 - '17**



Top Importing Countries of Tropical Wood to U.S. – USD

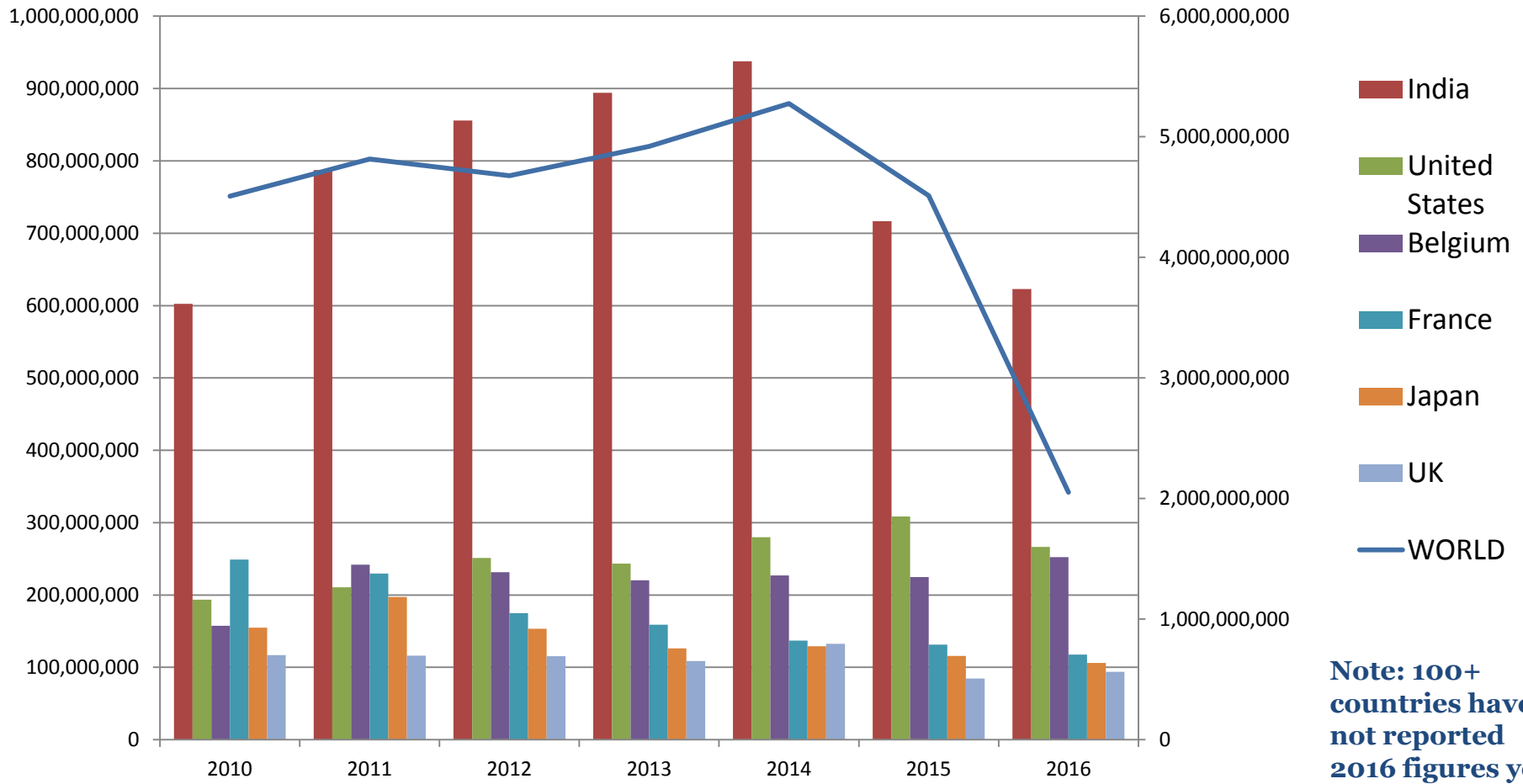


**Note: Imports up 6 Mil,
Jan-Feb YTD '16 - '17**

Source: U.S. Census, includes HTS #'s 4403.31 – 4403.49 (7 codes); 4407.21 – 4407.29 (9 codes).



Top Importers of Tropical Wood In the World – USD



Source: UN HS Merchandise Trade, includes HTS #'s 4403.31 – 4403.49 (7 codes); 4407.21 – 4407.29 (9 codes).



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International Trade Administration

- Strengthens competitiveness of U.S. industry, promotes trade and investment, and ensures fair trade through the rigorous enforcement of our trade laws and agreements.
- Works to improve the global business environment & helps U.S. organizations compete at home & abroad.
- **Industry & Analysis** – ITA’s industry, trade, and economic experts who advance the competitiveness of U.S. companies. I&A leverages ITA’s relationships with manufacturing and services industries to increase U.S. exports.
- **Commercial Service** – ITA’s country and regional experts, overseas and domestic field staff provide U.S. firms with the full suite of country-specific export promotion services and market access advocacy, while promoting the United States as an investment destination.
- **Enforcement and Compliance** – enforces U.S. trade laws and ensures compliance with trade agreements negotiated on behalf of U.S. industry.



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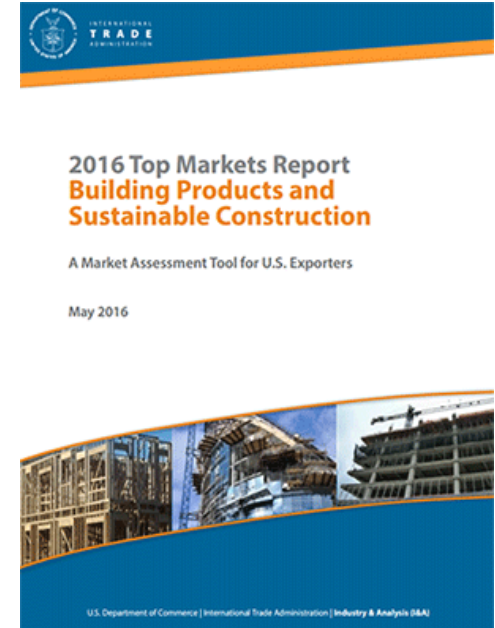
2016 Top Markets

Building Products & Sustainable Construction

HVACR – Lighting – Plumbing Products – **Wood Products** – Insulation – Doors & Windows – Glass

- ✓ Export market rankings (2018)
- ✓ Global trends driving opportunity
- ✓ State of global trade
- ✓ Exporter challenges
- ✓ USG resources
- ✓ 10 Country case studies

www.trade.gov/topmarkets

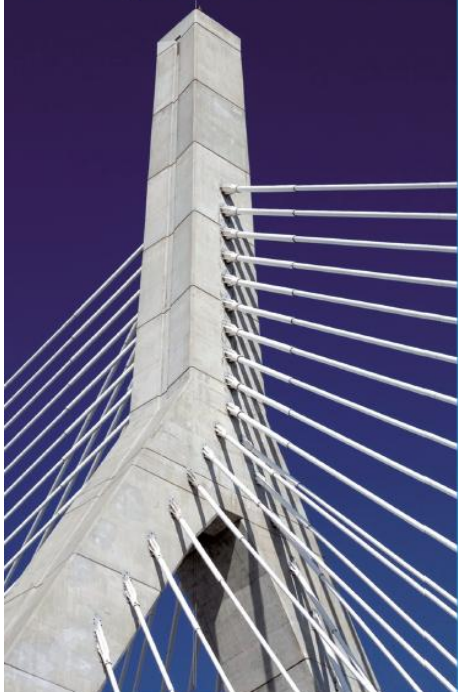




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Protecting Intellectual Property in Export Markets

Tools for
Building Product Manufacturers



STOPfakes.gov

Minimizing risk to valuable IP is important to any export strategy

ITA offers U.S. exporters information on steps to begin protecting IP in international markets, including:

- ✓ Brands
- ✓ Trademarks
- ✓ Trade secrets
- ✓ Patents
- ✓ Product designs
- ✓ Other valuable forms of intellectual property

ITA encourages U.S. exporters to:

- Pick up a copy of this brochure
- Go to www.STOPfakes.gov
- Participate in IP protection webinars coming soon – let us know of your interest



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DOC Data Services on Industry & Trade, & Information Resources (Links)

TradeStats Express (TSE):

<http://tse.export.gov>

Trade Information Policy System (TPIS):

http://tpis.ita.doc.gov/TPIS_PUBLIC/

FTA Tariff Tool:

<http://export.gov/fta/ftatarifftool/>

Trade Statistics Main Page:

<http://www.trade.gov/mas/ian/tradestatistics/index.asp>

U.S. International Trade Commission (ITC) Trade Data Web:

<http://dataweb.usitc.gov/>

Bureau of Labor Statistics (U.S. Department of Labor):

<http://www.bls.gov/data/>



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The Industry Trade Advisory Committee

A Unique Public-Private Partnership – Industry’s Voice in U.S. Trade Policy

- Since 1974, the U.S. Department of Commerce and the U.S. Trade Representative (USTR) have worked side-by-side with business leaders who serve as industry trade advisors to the U.S. Government.
- USTR/Commerce jointly administer the Industry Trade Advisory Committee (ITAC) system to reflect today’s U.S. economy & vision for the future (www.trade.gov/itac).
- Currently, approximately 370 industry representatives serve as advisors to Commerce and USTR with a diverse representation of private industries ranging from small to large companies and from all U.S. geographic regions.
- Commerce and USTR consider the ITACs to be an integral part of the U.S. trade policy-making process. Advisors have direct access to policymakers and negotiators to offer industry positions on U.S. trade policy and negotiating objectives.
- Related ITAC: ITAC 7 – Forest Products.



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