

C.2

UNITED STATES INTERNATIONAL TRADE COMMISSION

BIRCH PLYWOOD DOOR SKINS

Report to the President on
Investigation No. TA-201-1
Under Section 201 of the Trade Act of 1974



USITC Publication 743
Washington, D. C.
October 1975

UNITED STATES INTERNATIONAL TRADE COMMISSION

COMMISSIONERS

Will E. Leonard, Chairman
Daniel Minchew, Vice Chairman
George M. Moore
Catherine Bedell
Joseph O. Parker
Italo H. Ablondi

Kenneth R. Mason, Secretary to the Commission

Address all communications to
United States International Trade Commission
Washington, D. C. 20436

HF 1756
AS
1975 ag

SL 10-30-75

CONTENTS

	<u>Page</u>
Report to the President-----	1
Finding of the Commission-----	2
Views of Commissioners Moore, Bedell, Parker, and Ablondi-----	3
View of Chairman Leonard-----	9
View of Vice Chairman Minchew-----	24
Information obtained in the investigation:	
Introduction-----	A-1
Description and uses:	
General-----	A-5
Description of plywood door skins-----	A-5
Method of manufacture: plywood door skins-----	A-7
Description of hardboard door skins-----	A-9
Materials competing with birch door skins-----	A-10
The question of increased imports:	
All door skins-----	A-12
Birch door skins-----	A-14
The question of serious injury to the domestic industry:	
U.S. producers-----	A-19
Producers of hardwood plywood and plywood door skins-----	A-19
Producers of hardboard and hardboard door skins---	A-23
Producers' efforts to compete with imports:	
All door skins-----	A-25
Birch door skins-----	A-25
Birch resources-----	A-26
U.S. purchasers:	
General description-----	A-28
Imports of wood doors-----	A-29
U.S. shipments, production, exports, and inventories:	
All door skins-----	A-32
Birch door skins-----	A-34
U.S. employment:	
All door skins-----	A-36
Birch door skins-----	A-36
Prices:	
All door skins-----	A-38
Birch door skins-----	A-40
Financial experience of U.S. producers-----	A-43
Overall operations of the establishments in which door skins are produced-----	A-44
Birch plywood door skins-----	A-45

CONTENTS

	<u>Page</u>
Information obtained in the investigation--Continued	
The question of imports as a substantial cause of injury:	
U.S. consumption:	
All door skins-----	A-48
Birch door skins-----	A-50
The trend in consumption versus the trend in	
housing-----	A-50
Price relationships between imported and domestic birch	
door skins-----	A-53
Appendix A. Statistical tables-----	A-55
Appendix B. Figures-----	A-83
Appendix C. Confidential tables-----	* *

Appendix Tables

1. Door skins: U.S. imports for consumption, by types, 1970-74 and, by quarters, 1974 and January-June 1975---	A-56
2. Door skins: Ratios of imports of birch door skins and of all door skins to production and consumption of door skins, as specified, 1970-74 and, by quarters, 1974 and January-June 1975-----	A-57
3. Selected wood door skins and wood doors: U.S. rates of duty, by commodity, 1975-----	A-58
4. Door skins: Estimated U.S. shipments, imports, exports, and apparent consumption, 1970-74 and by quarters, 1974 and January-June 1975-----	A-59
5. Plywood door skins other than birch and lauan: Estimated U.S. shipments, imports, and apparent consumption, by species, 1970-74 and, by quarters, 1974 and January-June 1975-----	A-60
6. Birch and lauan door skins: U.S. imports for consump- tion, 1950-74-----	A-61
7. Lauan door skins: U.S. imports for consumption, by principal sources, 1966-74-----	A-62
8. Lauan door skins: U.S. imports for consumption, by principal sources and by months, January-June 1975-----	A-63
9. Lauan door skins: U.S. imports for consumption, by months, January 1973-June 1975-----	A-64
10. Lauan door skins: U.S. imports for consumption, by customs district of unlading, 1973-74 and January-June 1975-----	A-65
11. Birch door skins: U.S. imports for consumption, by principal sources, 1966-74-----	A-66

CONTENTS

	<u>Page</u>
12. Birch door skins: U.S. imports for consumption, by principal sources and by months, January-June 1975-----	A-67
13. Birch door skins: U.S. imports for consumption, by months, January-1973-June 1975-----	A-68
14. Birch door skins: U.S. imports for consumption from Japan, Canada, and Finland, by customs district of unloading, 1970, 1972-74, and January-June 1975-----	A-69
15. Flush doors: U.S. shipments, by types, 1963, 1967, and 1972-----	A-70
16. Wood doors: U.S. imports for consumption, by principal sources, 1970-74-----	A-71
17. Wood doors: U.S. imports for consumption, by principal sources and months, January-June 1975-----	A-72
18. Wood doors: U.S. imports for consumption, by months, 1973, 1974, and January-June 1975-----	A-73
19. Wood doors: U.S. imports for consumption, by customs district of unloading, 1973, 1974, and January-June 1975-----	A-74
20. Door skins: U.S. market shipments, by types, 1970-74 and, by quarters, 1974 and January-June 1975-----	* *
21. Birch door skins: U.S. market shipments by domestic producer, 1970-74 and, by quarters, 1974 and January-June 1975-----	* *
22. Door skins: Estimated U.S. captive shipments, by types, 1970-74 and, by quarters, 1974 and January-June 1975---	* *
23. Door skins: Estimated U.S. production, by types, 1970-74 and, by quarters, 1974 and January-June 1975---	A-78
24. Door skins: Estimated U.S. end-of-period inventories, by types, 1969-74 and, by quarters, 1974-----	A-79
25. Average prices paid for door skins by U.S. producers of flush doors, by types, 1970, 1971, and, by quarters, 1972-74 and January-June 1975-----	A-80
26. Indexes of U.S. wholesale prices for hardwood plywood and other selected commodities, by quarters, 1968-74 and January-June 1975-----	A-81
27. Index of Japanese export prices for birch plywood, by months, 1970-74 and January-June 1975-----	A-82

Figures

1. Private housing starts and U.S. imports of door skins, 1950-75-----	A-84
2. U.S. imports of birch and lauan door skins, 1950-74-----	A-85

CONTENTS

	<u>Page</u>
3. U.S. imports of birch and lauan door skins, by quarters, 1966-75-----	A-86
4. Average unit value of U.S. imports of birch door skins, by quarters, 1970-74 and January-June 1975-----	A-87
5. All door skins: Plant locations of U.S. manufacturers, 1975-----	A-88
6. Flush doors: Plant locations of U.S. manufacturers, 1975-----	A-89
7. All door skins: U.S. producers' inventories, 1969-74----	A-90
8. Average prices paid for door skins by U.S. flush-door producers, by kinds, 1970-75-----	A-91
9. U.S. wholesale price indexes, by quarters, 1968-75-----	A-92
10. Door skins: U.S. consumption, imports, and domestic shipments, by kinds, 1970-74-----	* *

Appendix Confidential Tables

1. Profit-and-loss experience of U.S. producers on their operations producing birch plywood door skins and those establishments in which birch plywood door skins are produced, 1970-75-----	* *
2. Profit-and-loss experience of U.S. producers on the overall operations of their establishments in which door skins were produced, by companies, accounting years 1970-75-----	* *
3. Profit-and-loss experience of 2 U.S. producers on their operations producing birch plywood door skins, by companies, 1970-75-----	* *

REPORT TO THE PRESIDENT

United States International Trade Commission
October 20, 1975

To the President:

In accordance with section 201(d)(1) of the Trade Act of 1974 (88 Stat. 1978), the U.S. International Trade Commission herein reports the results of an investigation made under section 201(b)(1) of that act relating to birch plywood door skins.

The investigation to which this report relates was undertaken to determine whether--

birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension 5/32 inch in thickness, 47 inches in width, and 85 inches in length, provided for in item 240.14 of the Tariff Schedules of the United States

are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

The investigation was instituted on May 12, 1975, upon receipt of a petition filed on April 18, 1975, under section 201(a)(1) of the Trade Act of 1974 by the Columbia Plywood Corp., a wholly owned subsidiary of Columbia Corp., Portland, Oregon. The petitioner requested the imposition of an increase in the rate of duty applicable to birch plywood door skins to 40 percent ad valorem or more or alternatively a quota on imports of such door skins equivalent to 75 percent of domestic consumption or three times domestic production.

Public notice of the institution of the investigation and of a public hearing to be held in connection therewith was given in the Federal Register (40 F.R. 21791) on May 19, 1975. The public hearing was held on August 5 and 6, 1975, and all interested parties were afforded an opportunity to be present, to produce evidence, and to be heard. A transcript of the hearing and copies of briefs submitted by interested parties in connection with the investigation are attached. 1/

The information in this report was obtained from fieldwork, responses to questionnaires sent to domestic producers and importers, the Commission's files, other Government agencies, and evidence presented at the hearing and in briefs filed by interested parties.

Determination of the Commission

On the basis of its investigation, the Commission does not determine (Commissioner Minchew dissenting) that birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension 5/32 inch in thickness, 47 inches in width, and 85 inches in length, provided for in item 240.14 of the Tariff Schedules of the United States are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

1/ The transcript and written statements were attached to the original report to the President.

Views of Commissioners Moore, Bedell, Parker, and Ablondi

On April 18, 1975, Columbia Plywood Corporation, a wholly owned subsidiary of the Columbia Corporation, Portland, Oreg., filed the first petition for import relief under section 201 of the Trade Act of 1974. On May 12, 1975, the United States International Trade Commission instituted an investigation under section 201(b)(1) of the Trade Act of 1974 to determine whether birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension 5/32 inch in thickness, 47 inches in width, and 85 inches in length, provided for in item 240.14 of the Tariff Schedules of the United States (TSUS), are being imported into the United States in such increased quantities as to be a substantial cause of serious injury or the threat thereof to the domestic industry producing an article like or directly competitive with such door skins.

Section 201(b)(1) of the Trade Act requires that each one of the following conditions be met before the Commission can recommend import relief to the President:

- (1) That imports of an article into the United States are increasing (either actually or relative to domestic production);
- (2) That a domestic industry producing an article like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and
- (3) That the increased imports are a substantial cause (i.e., an important cause, not less than any other cause) of the serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Because the criteria for an affirmative finding are expressed in the conjunctive, the finding that one of the criteria is not satisfied necessarily results in a negative determination and a denial of import relief.

Even assuming for the purpose of this investigation that there are increased imports and an injury to an industry in the United States, we have determined that the criteria set forth in section 201(b)(1) of the Trade Act for an industry to be eligible for import relief have not been satisfied. Specifically, we have determined that increased imports are not a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

The term "substantial cause" is new to the "escape clause" criteria. The Trade Act, at section 201(b)(4), defines "substantial cause" to mean "a cause which is important and not less than any other cause." The legislative history of the Trade Act sheds considerable light on the meaning of the term. The House Ways and Means Committee Report states that --

The Committee intends that a dual test be met-- imports must constitute an important cause and be no less important than any other single cause. For example, if imports were just one of many factors of equal weight, imports would meet the test of being "not less than any other [sic] but it would be unlikely that any of the causes would be deemed an "important" cause. If there

were any other cause more important than imports, then the second test of being "not less than any other cause" would not be met. On the other hand, if imports were one of two factors of equal weight and there were no other factors, both tests would be met. 1/

The Senate Finance Committee Report states further:

The Committee recognizes that "weighing" causes in a dynamic economy is not always possible. It is not intended that a mathematical test be applied by the Commission. The Commissioners will have to assure themselves that imports represent a substantial cause or threat of injury, and not just one of a multitude of equal causes or threats of injury. It is not intended that the escape clause criteria go from one extreme of excessive rigidity to complete laxity. An industry must be seriously injured or threatened by an increase in imports, and the imports must be deemed to be a substantial cause of the injury before an affirmative determination should be made. 2/

The most important cause of the injury complained of by domestic producers of birch plywood door skins is the decrease in consumption of door skins resulting from the decline in housing starts. Door skins, because of their unique dimensions, are utilized almost entirely in the manufacture of flush doors. Such doors have had widespread acceptance for many years in new housing, as well as for replacement doors in older buildings.

Information available to the Commission clearly demonstrates a long-term correlation between private housing starts and imports

1/ H.R. Rept. No. 93-571 (93d Cong., 1st sess.), 1973, at p. 46.

2/ S. Rept. No. 93-1298 (93d Cong., 2d sess.), 1974, at pp. 120-121.

of birch plywood door skins. Trends in private housing starts peaked in 1955, 1959, 1963, 1968, and 1972, and lows are clearly in evidence in 1958, 1960, 1966, 1970, and January 1974-June 1975. In each case, the high and low points of housing starts coincided with or were closely followed by highs and lows in imports; a similar correlation exists between private housing starts and domestic shipments of birch plywood door skins. Housing starts, which began their most recent major decline in 1972, decreased from 2.4 million for that year to 1.3 million for 1974, representing a reduction of 46 percent. Domestic consumption of door skins similarly declined, dropping by nearly 39 percent over the same period.

Analyses of imports, both actual and relative to domestic production, of the proportion of the market supplied by domestic producers, and of the consumption of birch door skins, when compared with housing starts, clearly demonstrate that conditions in the housing market, rather than imports, are the most important cause of the injury being suffered by domestic producers of birch door skins. Pertinent statistics are set forth in the following tables.

U.S. consumption of birch door skins and housing
starts, 1971-74

Year	Consumption	Housing starts	Increase or decrease in--	
			Consumption	Housing starts
	<u>Million sq. ft.</u>	<u>Millions</u>	<u>Percent</u>	<u>Percent</u>
1971-----	162	2.1	-	-
1972-----	189	2.4	+16.7	+14.3
1973-----	165	2.0	-12.7	-16.7
1974-----	113	1.3	-31.5	-35.0

Birch door skins: U.S. production, imports, and consumption, 1970-73 and
January-September of 1973 and 1974

Year	U.S. production	Imports	Total consumption	Import production ratio	Domestic consumption ratio
	<u>Million sq. ft.</u>	<u>Million sq. ft.</u>	<u>Million sq. ft.</u>	<u>Percent</u>	<u>Percent</u>
1970-----	20	153	171	89.5	11.7
1971-----	28	132	162	81.5	17.3
1972-----	37	151	189	79.9	19.6
1973-----	39	126	165	76.4	23.6
Jan.-Sept---	<u>1/</u> 31	97	<u>1/</u> 128	<u>1/</u> 75.8	<u>1/</u> 24.2
1974:					
Jan.-Sept---	24	76	100	76.0	24.0

1/ Estimate based on the production of the largest domestic producer.

Therefore, based upon the facts before the Commission in this investigation, we have determined that birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension $5/32$ inch in thickness, 47 inches in width, and 85 inches in length, provided for in item 240.14 of the TSUS, are not being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

STATEMENT OF REASONS OF

CHAIRMAN WILL E. LEONARD

On April 18, 1975, the United States International Trade Commission (Commission) received a petition filed by the Columbia Plywood Corporation, a division of which is the Allen Quimby Veneer Company, Bingham, Maine, requesting an investigation under section 201 of the Trade Act of 1974 (Trade Act) with respect to imports of birch plywood door skins. The Commission, on May 12, 1975, instituted such an investigation in order to determine whether birch plywood door skins (birch skins) are being imported into the United States in such increased quantities as to be a substantial cause of serious injury or the threat thereof to the domestic industry producing an article like or directly competitive with such birch skins.

Changed "escape clause" criteria

The petition and investigation referred to above are the first received and conducted, respectively, by the Commission under section 201 of the Trade Act. As the statements of reasons made in this report are also the first such with respect to an investigation under section 201 of the Trade Act, I believe it appropriate to comment briefly on the changes in the criteria

regarding eligibility for import relief made by section 201(b)(1)^{1/} with respect to analogous criteria under section 301(b)(1)^{2/} of the Trade Expansion Act of 1962 (TEA).

It is apparent that the changes made by section 201(b)(1) in the provisions of U.S. foreign trade law which provide for relief to a domestic industry injured or threatened with injury from import competition (that law domestically implementing the so-called escape clauses of international trade agreements) were intended to "liberalize" the criteria, previously found in section 301(b)(1) of the TEA, which must be met by an industry in order to be eligible for relief. Under the TEA, an industry had to meet essentially four identifiable criteria:

1. Imports of the article concerned must be entering in increased quantities.

- 1/ Section 201 (b)(1) reads as follows: "Upon the request of the President or the Special Representative for Trade Negotiations, upon resolution of either the Committee on Ways and Means of the House of Representatives or the Committee on Finance of the Senate, upon its own motion, or upon the filing of a petition under subsection (a)(1), the Commission shall promptly make an investigation to determine whether an article is being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article."
- 2/ Section 301(b)(1) reads as follows: "Upon the request of the President [sic] upon resolution of either the Committee on Finance of the Senate or the Committee on Ways and Means of the House of Representatives, upon its own motion, or upon the filing of a petition under subsection (a)(1), the Tariff Commission shall promptly make an investigation to determine whether, as a result in major part of concessions granted under trade agreements, an article is being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to the domestic industry producing an article which is like or directly competitive with the imported article."

Section 301(b)(3), which further explains the causal connection between increased imports and the requisite injury, reads as follows:

"For purposes of paragraph (1), increased imports shall be considered to cause, or threaten to cause, serious injury to the domestic industry concerned when the Tariff Commission finds that such increased imports have been the major factor in causing, or threatening to cause, such injury."

2. The increased imports must be in major part the result of concessions granted under trade agreements.
3. The domestic industry producing like or directly competitive articles must be seriously injured or threatened with serious injury.
4. The increased imports resulting in major part from trade-agreement concessions must be the major factor causing, or threatening to cause, the serious injury.

Under section 201(b)(1) of the Trade Act, these criteria for relief provided in the TEA underwent significant changes. The increased imports referred to in the first criterion above, which under the TEA appears to have required^{1/} absolute increases, may now represent either absolute increases, or increases relative to domestic production or consumption (even though not increases in absolute terms). The second criterion above under the TEA was dropped altogether; thus, no longer is there any need to show a causal connection between increased imports and trade agreement concessions. The fourth criterion above under the TEA was changed so that increased imports now need only be a substantial cause of, rather than the major factor in causing, the actual or threatened injury to the domestic industry. The third criterion above under the TEA, requiring the domestic industry to be seriously injured or threatened with serious injury, remains the same.

Thus, section 201(b)(1) of the Trade Act can be conveniently separated into three criteria which must be met for an industry to be eligible for relief:

^{1/} See discussion at p. 14, herein.

1. Imports of the article concerned must be in increased quantities.
2. The domestic industry producing like or directly competitive articles must be seriously injured or threatened with serious injury.
3. The increased imports referred to in 1 above must be a substantial cause of the injury, or threat thereof, referred to in 2 above.

While it is apparent that Congress in section 201(b)(1) sought to reduce the stringency of the criteria for eligibility for import relief (the term "import relief" in this statement includes import restraints as well as adjustment assistance), this does not mean, in the words (at p. 121) of the Report of the Senate Committee on Finance (S. Rept. No. 93-1298) (Finance Report) on the bill which became the Trade Act, "that the escape clause criteria go from one extreme of excessive rigidity to complete laxity."^{1/} The Finance Report indicates (at p. 122), for example--

That escape clause is not intended to protect industries which fail to help themselves become more competitive through reasonable research and investment efforts, steps to improve productivity and other measures that competitive industries must continually undertake.

Determination

As a result of the evidence obtained by the Commission during the course of this investigation (Investigation No. TA-201-1), I determine that the criteria as set out in section 201(b)(1) of the Trade Act of 1974 for an industry to be eligible to receive import relief have not

^{1/} See also the statement (at p. 74) of the Report of the House Committee on Ways and Means (H. Rept. No. 93-571), noting that the eligibility criteria set out in section 201(b)(1) are not automatically met.

been met. Specifically, I find that the first criterion under section 201(b)(1), as set out above, i.e., that the article concerned is being imported into the United States in such increased quantities, is not satisfied in the case at hand.

The criteria of section 201(b)(1) are cumulative, and failure to satisfy one criterion necessitates a negative determination, no matter what the facts show with respect to the other criteria. Because the instant negative determination is based on a finding that the "increased imports" criterion is not met, the following discussion is limited to that criterion alone, as such finding makes it unnecessary to consider other issues which may have been raised in this investigation or to discuss the other criteria.^{1/}

What does the "increased imports" criterion mean?

Section 201(b)(1) of the Trade Act requires that in order for an industry in the United States to be eligible for import relief, it is necessary to have an article "being imported into the United States in such increased quantities" as to be a substantial cause of the requisite statutory injury. (The words in quotations shall be referred to hereafter as criterion 1, as was set out above.) "Increased" is the operative word. If "increased" were to have no significance, the statute could just as well have been drawn without it, to read "in such quantities." But "increased"

^{1/} Not considering all issues or criteria when one issue is dispositive is analogous to Federal courts not anticipating a question of constitutional law in advance of the necessity of deciding it. (Petite v. U.S., 361 U.S. 529 (1960); Langton v. Johnson, 478 F.2d 915; (D.C. Cir. 1973.))

is in the law. My determination in this investigation turns upon the meaning of the statutory phrase "is being imported...in such increased quantities..." A thorough examination of the meaning of this phrase and the facts of this investigation relevant to it will occupy the remainder of this statement.

In general, "increased", in the context of section 201(b)(1), denotes something becoming larger as time passes. Thus, the plain intent of Congress in using "increased" is that a stable import situation, even if imports are sizeable, does not alone satisfy criterion 1; rather, imports must become larger over a period of time in order to satisfy the criterion. Government intervention under the import relief provisions of the Trade Act can only be triggered by increasing imports; thus, "is being imported into the United States in such increased quantities." (Emphasis supplied.)

Absolute and relative increases.--Under section 301(b)(1) of the TEA, it is likely that the increase in imports had to have been an absolute increase to satisfy the criterion of that section. This conclusion is based primarily on a reading of the history of prior provisions leading to section 301(b)(1) of the TEA. Under a prior statute, section 7 of the Trade Agreements Extension Act of 1951, Congress had specifically provided that either absolute or relative increases in imports would satisfy the requirement of an increase in imports. Under section 301(b)(1) of the TEA, however, the language with respect to relative increases was dropped. It follows, therefore, that relative increases in imports were not to be considered under the TEA.

Criterion 1 is worded identically in section 301(b)(1) of the TEA and in section 201(b)(1) of the Trade Act. Undoubtedly, an absolute increase in imports meets criterion 1 under section 201(b)(1) just as it did under section 301(b)(1). However, in addition, it is maintained that

a relative increase in imports, that is, an increase in imports, not in absolute numbers, but relative to domestic production (and to domestic consumption), can also satisfy criterion 1 under section 201(b)(1).

While section 201(b)(1) of the Trade Act does not itself mention specifically that a relative increase in imports may be considered as meeting criterion 1, it is implicit that relative increases were intended to satisfy such criterion. In section 201(b)(2)(C), the statute requires the Commission to take into account, with respect to substantial cause, "an increase in imports (either actual or relative to domestic production)...." This language would be rendered meaningless if in fact criterion 1 of section 201(b)(1) were read as being satisfied only by an absolute increase in imports. Of course, meaning must be given to all the words in a statute. Therefore, the "increase in imports ... relative to domestic production" must mean that a relative increase in imports would satisfy criterion 1 in section 201(b)(1). Analogously, section 201(b)(2)(C) requires the Commission also to take into account, with respect to substantial cause, "a decline in the proportion of the domestic market supplied by domestic producers." To read criterion 1 as being satisfied only by an absolute increase in imports and not by an increase in the share of the market or share of consumption would restrict unduly the meaning of the last quoted language.

Further, in the so-called worker, firm, and community cases under the Trade Act (see sections 221 et seq., 251 et seq., and 271 et seq., respectively), the statute permits the Secretary of Labor and the Secretary of Commerce, respectively, to consider either absolute or relative increases in imports in determining whether the criteria for

adjustment assistance have been satisfied.^{1/} While the language used in the statutory sections dealing with criteria for eligibility in worker, firm, and community cases (sections 222, 252, and 271, respectively) is somewhat different from that used in section 201(b)(1) of the Trade Act, the language is similar enough and the subject matter closely enough related to conclude that in the absence of evidence of a contrary Congressional intent, criterion 1 of section 201(b)(1) should be read with respect to the propriety of looking at relative increases of imports in the same manner as analogous phrases are read in the worker, firm, and community cases with respect to this issue.

In summary, therefore, an increase in imports relative to domestic production or as a share of domestic consumption can satisfy criterion 1 of section 201(b)(1).

Increase precedes injury.--Also arising with respect to the satisfaction of the requirement of criterion 1 of section 201(b)(1) is the issue of what imports should be considered to determine if imports are increasing. Imports to be considered as satisfying criterion 1 must be imports that could possibly cause the requisite statutory injury. The statute speaks of imports of an article "in such increased quantities as to be a substantial cause of serious injury, or the threat thereof...." Thus, the increased imports are tied to the injury and can only be those which have caused the injury. Any increase in imports after an injury has manifested itself in its most virulent form should not be regarded as the increase necessary to satisfy criterion 1. If increased imports are to be a

^{1/} See, for example, the report of the Committee of Conference (H. Rept. No. 93-1644) to accompany H.R. 10710, the bill which became the Trade Act of 1974, at pp. 35-36 and 39.

substantial cause of serious injury they must precede the serious injury; a cause cannot be contemporaneous with or subsequent to its effect. Otherwise, there could be built into every investigation under section 201(b)(1) of the Trade Act a relative increase in imports as a result of an industry's actions in reducing or terminating production.

Period of increase.--Important to a finding of whether there are increased imports is the period of time to be examined. A reference to increased imports is necessarily a reference to a period of time, since increases can only be manifested over a period of time.

Guidance on this point is given in the language of section 201(b)(1). That section requires that an article "is being imported" (emphasis supplied) into the United States. The language, thus, limits the Commission's consideration of whether criterion 1 is satisfied to importation during relatively recent years and imposes some limitation upon the Commission's going very far into the past. Commission practice under section 301(b)(1) of the TEA, which used the same wording as section 201(b)(1), was generally to consider data, including those on whether imports were increasing, for a recent period (often 5 years or so)^{1/} prior to the date of the investigation. This practice was supportable

^{1/} See, for example, Softwood Lumber, Investigation No. TEA-I-4, TC Publication 79 (February 1963), p.6; Household China Tableware and Kitchenware, Investigation No. TEA-I-1, TC Publication 84 (April 1963); Ice Skates and Parts Thereof, Investigation No. TEA-I-9, TC Publication 149 (February 1965), p. 3; and Nonrubber Footwear, Investigation No. TEA-I-18, TC Publication 359 (January 1971), pp. 10-11 (views of Commissioners Clubb and Moore) and p. 36 (views of Commissioner Leonard). The Commission often looked at imports over a longer period of time for the purpose of determining if the increase in imports were linked to a trade-agreement concession, as required by sec. 301(b)(1), but at more recent periods for the purpose of determining if an article "is being imported . . . in such increased quantities"

because statutorily cognizable injury is usually closely time-linked with import performance, and the limitation imposed by the language "is being imported" would generally argue against looking further back absent compelling considerations. Congress must have been presumed to be aware of the Commission practice and did not indicate any disapproval of such practice in the enactment of section 201(b)(1).

Further direction is given to the Commission on this question by the language of the Finance Report referred to above. The report provides (at p. 120):

The increase in imports referred to would generally be such increases as have occurred since the effectiveness of the most recent trade agreement concessions proclaimed by the President, i.e., as of now, the effectiveness of the Kennedy Round concessions beginning in 1968. 1/

This language apparently authorizes the Commission at the present time to go back to 1968, if necessary, to determine whether imports have been increasing.

Although the Finance Report language quoted above includes the word "generally", which could be interpreted as permitting the consideration of pre-1968 imports, it is doubtful whether the Commission should, absent compelling reasons, go back before 1968 to find whether there are increased imports. The reference to the Kennedy Round negotiations in the Finance Report was a considered one, reflecting in part the view

1/ This language in the Finance Report is curious, in that it apparently ties the requirement of an increase in imports to a period beginning with the effectiveness of the most recent trade-agreement concessions, while, as previously noted, sec. 201(b)(1) of the Trade Act has eliminated the requirement of sec. 301(b)(1) of the TEA that the increased imports be in major part the result of trade-agreement concessions.

that import trends are what the Commission should be considering with respect to criterion 1. Congress was aware of the practice that the Commission generally looked at a recent period, often of 5 years or so, to determine whether imports were increasing, and sometimes the Commission has even made specific reference to the fact that trends are what the Commission is looking for with respect to finding increased imports. ^{1/} In short, Commission decisions under the TEA consistently treated with import performances over a period of years, rejecting implicitly any idea that comparison of import levels over short periods of time, or at widely separated points in time, is appropriate.

No increased imports in this investigation

Having set out some of the points that must be treated with in a consideration of criterion 1, it is appropriate now to see what the facts in this investigation show with respect to the satisfaction of the criterion. In this investigation I have considered imports as defined by the Commission's notice of investigation. Such imports are birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension 5/32 of an inch in thickness, 47 inches in width, and 85 inches in length, as provided for in item 240.14 of the Tariff Schedules of the United States. As the alleged injury in this case was manifested most remarkably by the discontinuance of production by the Allen Quimby Veneer Company in October 1974, such company accounting for not less than a majority

^{1/} See, for example, the cases cited in footnote 1 on p. 11, supra, and Watches, Watch Movements, and Parts of Watch Movements, Inv. No. TEA-I-7, TC Publication 142 (October 1964), p. 5.

of domestic birch skin production during the years 1970 through 1974, I have not considered, in making my finding of no increased imports, levels of imports, or of production and consumption, of birch skins in the fourth quarter of 1974 or during 1975. Such imports would have come after, not before, the alleged serious injury and therefore, as explained previously, could not have caused the injury.

With this in mind, I have determined that the trend in the level of importation of birch skins, whether looked at in absolute terms or in terms relative to domestic production or consumption, has been a trend of decreasing, not increasing, imports. During the period 1968 through September 1974, the volume of imports of birch skins declined in absolute terms irregularly from 158 million square feet (MMSF) in 1968 to 126 MMSF in 1973. The level of imports for the first three quarters of 1974 were 76 MMSF, as compared with 97 MMSF for the first three quarters of 1973. As a percentage of domestic production and of consumption of birch skins, birch skin imports also declined. The ratio of imports of birch skins to domestic production of such skins declined from 782% in 1970 ^{1/} to 324% in 1973. The ratio in the first three quarters of 1974 declined further to 317%. The ratio of imports to domestic consumption declined from 89% in 1970 to 76% in 1973. The first three quarters of 1974 showed the ratio was the same as in 1973, i.e., 76%. The following charts demonstrate these downward trends in the importation of birch skins.

^{1/} The Commission only has available to it accurate data on domestic production and consumption of birch skins back to 1970.

Figure 1.--Birch door skins: U.S. imports for consumption, 1968-74

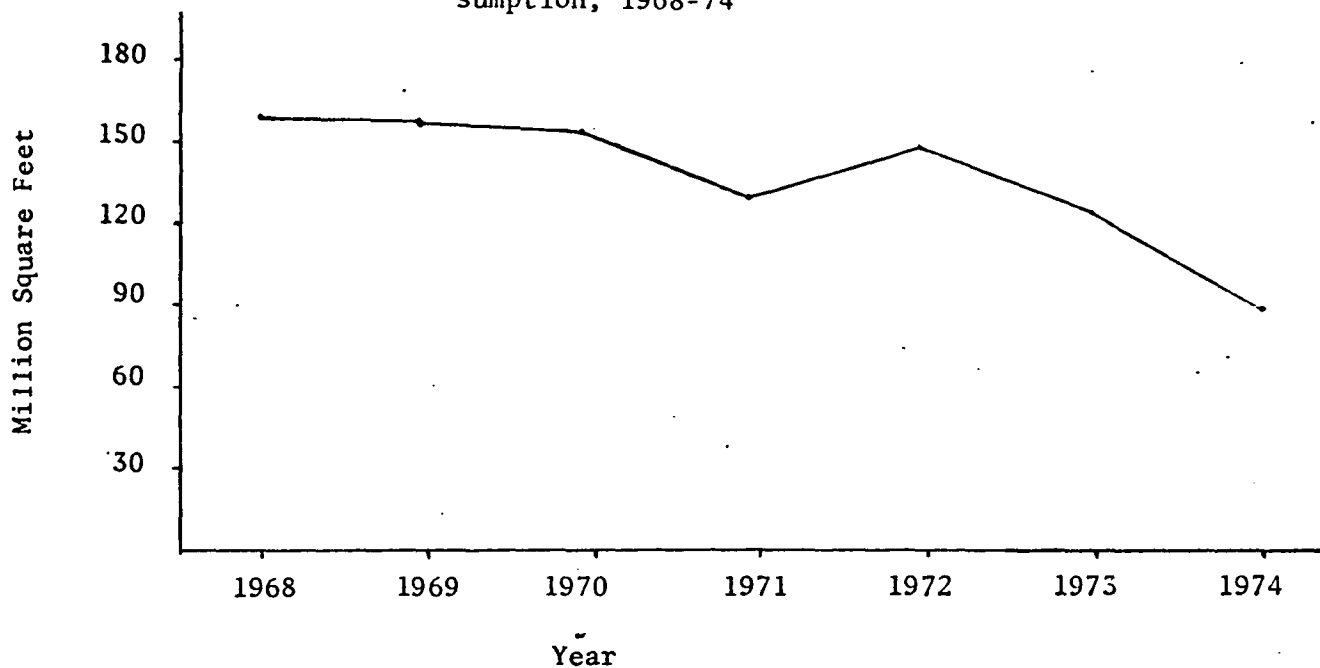
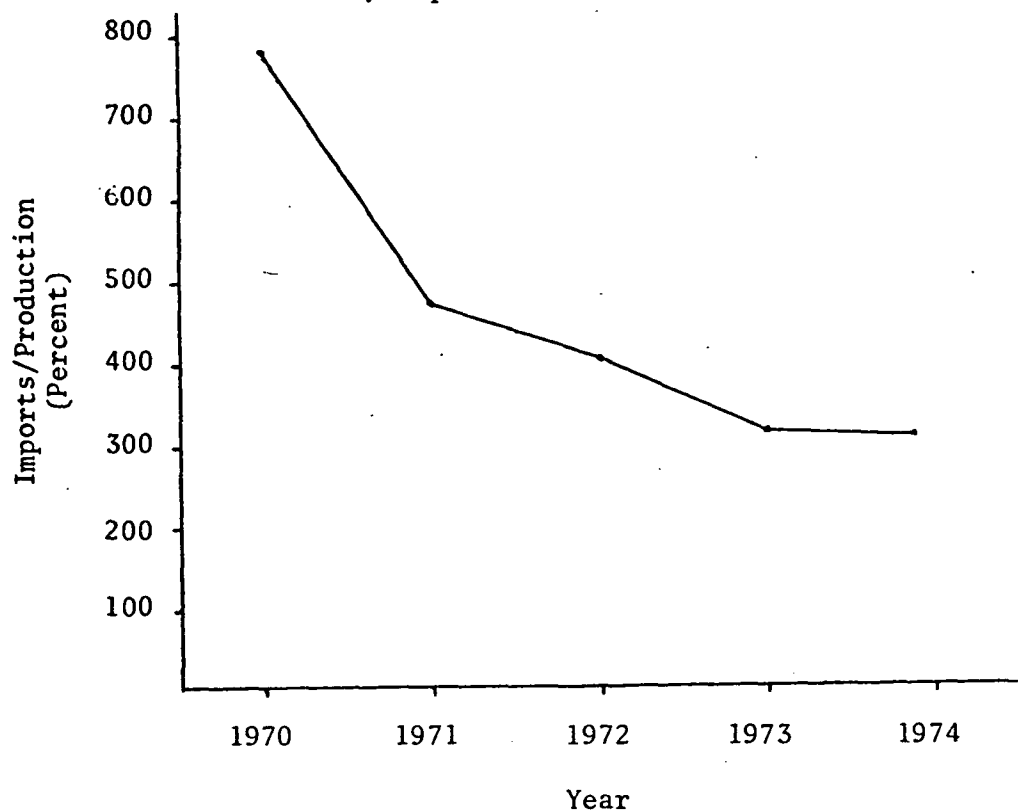
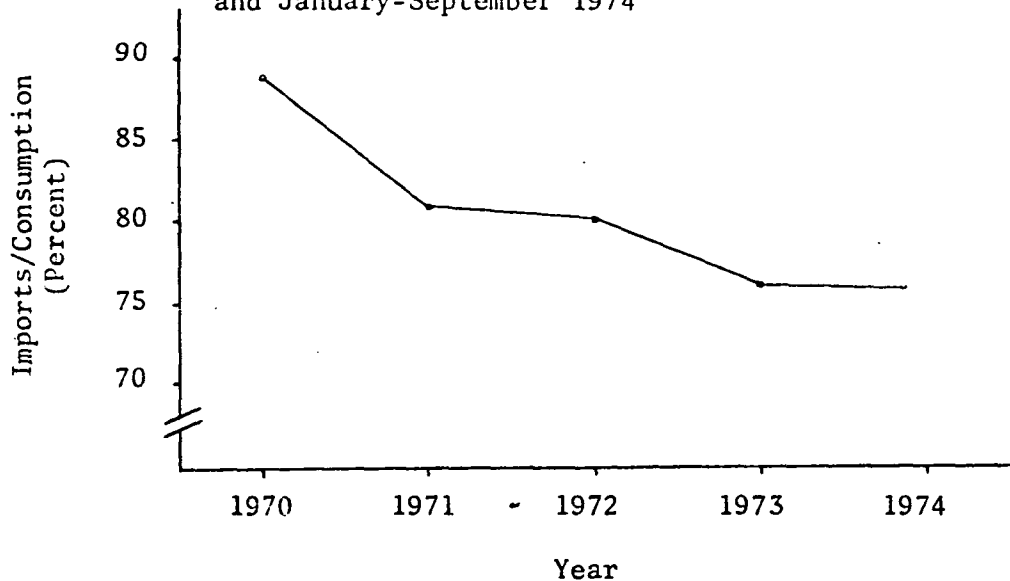


Figure 2.--Ratio of imports of birch door skins to domestic production of birch door skins, 1970-73, and January-September 1974



Source: Compiled from official statistics of the U.S. Department of Commerce and from information supplied by domestic producers.

Figure 3.--Ratio of imports of birch door skins to domestic consumption of birch door skins, 1970-73 and January-September 1974



Source: Compiled from official statistics of the U.S. Department of Commerce and from information supplied by domestic producers.

The above leads me to conclude that criterion 1 of section 201(b)(1), that the article concerned is being imported into the United States in such increased quantities, is not satisfied in this case. 1/ It is to be

1/ In May 1975, the Department of Labor found under section 223 of the Trade Act that increases of imports like and directly competitive with the birch plywood door skins produced at the Allen Quimby Veneer Co., Bingham, Maine, contributed importantly to the total or partial separation of the workers of that firm, and therefore certified such workers for adjustment assistance. The Department of Labor was able to find increased imports only by examining data for all of 1974, including imports during the last quarter thereof which I have not examined because, as stated above, such imports occurred after the injury alleged had appeared in its most manifest form. Such imports could not cause, in my opinion, the injury which section 201(b)(1) requires be found and hence are not the imports to be considered in determining if imports increased under section 201(b)(1).

noted that this determination is consistent with the determination I made in a "worker" case under the TEA, Birch Plywood Door Skins ..., Investigation No. TEA-W-259, ITC Publication 719 (February 1975). That determination, in relevant part, considered an increase in imports only in absolute terms, as the investigation was under the TEA. I found that imports of birch door skins declined irregularly from 1970 through 1974. This and other information led to the conclusion that "it appears that the first criterion of the TEA referred to above has not been satisfied." (The first criterion referred to was identical in wording to criterion 1 being considered in this investigation.)

Conclusion

As indicated earlier, I determine that the requirements of section 201(b)(1) of the Trade Act have not been met. Specifically, I do not find criterion 1, "increased imports", has been satisfied. The other criteria of section 201(b)(1) have not been discussed in this statement; such discussion will await other investigations under section 201(b)(1) which may turn on the other criteria.

Statement of Reasons for Affirmative Determination
of Vice Chairman Minchew

Following receipt on April 18, 1975, of a petition filed by the Columbia Plywood Corporation, a wholly owned subsidiary of the Columbia Corporation, Portland, Oregon, the United States International Trade Commission, on May 12, 1975, instituted an investigation under section 201 of the Trade Act of 1974 to determine whether birch plywood door skins are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

In order to find in the affirmative in the present case, it is necessary that all three of the following conditions be met:

- (1) that an article is being imported into the United States in increased quantities--i.e., that there are increased imports;
- (2) that a domestic industry producing an article like or directly competitive with the imported article is being seriously injured or threatened with serious injury; and
- (3) that such increased imports of an article are a substantial cause of the serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article.

Since the representativeness of the petitioner was questioned during the public hearing and since the fact is that the petitioner is not presently a manufacturer, I feel that a discussion of this point is warranted before giving the reasoning for my determination. The three elements of proof necessary in this case for an affirmative determination will be discussed in turn.

Representative of an industry

Section 201(a)(1) of the Trade Act of 1974 provides, in part, that--

A petition for eligibility for import relief for the purpose of facilitating orderly adjustment to import competition may be filed with the International Trade Commission (hereinafter, in this chapter referred to as the "Commission") by an entity, including a trade association, firm, certified or recognized union, or group of workers, which is representative of an industry.

Counsel for the importers, at the hearing, moved to strike the petition on the grounds that the testimony offered by the petitioner demonstrated that the petitioner was not representative of a U.S. industry, and, therefore, lacked standing to file the petition. The motion to strike was based on the contention that the Allen Quimby Veneer Company (Quimby), a division of the petitioner and the petitioner's only entry in the door skin manufacturing business, had ceased production of birch door skins on October 6, 1974, and did not file the petition for import relief until April 18, 1975, and, therefore should not be considered representative of the industry.

I do not find this argument persuasive. While it is true that Quimby ceased production of birch door skins prior to the filing of its petition for import relief, Quimby has maintained production capability for birch door skins at considerable expense since cessation of production. Does this statute contemplate that an injured industry which has been forced out of production but which still maintains a production capability be denied access to import relief, while an industry which has not been injured to the extent of closure may still avail itself of such relief? I think not.

The domestic industry includes all domestic producers of an article that is "like or directly competitive" with the imported article. It is arguable that hardboard door skins may be "directly competitive" with birch

door skins, since the purpose served is basically the same. However, the nature of the two articles is different, particularly regarding appearance. Therefore, because of the unique nature of birch door skins, I consider the domestic industry to include only those domestic producers of birch door skins.

Finding the domestic industry to be only that of the manufacture of birch door skins and considering testimony that prior to closure of Quimby in October of 1974 Quimby held* * percent of domestic production of birch door skins, I am satisfied that it should be considered as representative of the industry.

Increased imports

Section 201(b)(2) of the Trade Act of 1974 provides--

In making its determinations under paragraph (1), the Commission shall take into account all economic factors which it considers relevant, including (but not limited to)-- . . .

(C) with respect to substantial cause, an increase in imports (either actual or relative to domestic production) and a decline in the proportion of the domestic market supplied by domestic producers. (Emphasis added.)

From 1973 to 1974 the share of the market supplied by domestic producers of birch door skins fell from 25 percent to 23 percent, and imports increased relatively during the same period from 3.07 times to 3.35 times as great as domestic production. During 1974, from the first quarter to the third quarter, which was the last quarter in which Quimby was still in production, the proportion of the domestic market supplied by domestic producers declined from 26 percent to 18 percent, and imports increased relative to domestic production from 2.7 times to 4.7 times as great. The average ratio of imports of birch door skins to consumption of birch door skins during

1973 was 75 percent, while in the third quarter of 1974 just prior to cessation of production by Quimby, the rate had jumped to 82 percent for that quarter.

The increased import question is a difficult one. In many cases a longer period of time may be required to show a trend for an increase in imports.. However, here we are dealing with a relatively small industry with a small profit margin.

I believe that the time period over which an increase in imports is measured should be related to the ability of an industry to withstand the increase. Here we have a situation in which imports for a long period of time have been a significant portion of the market--70 percent already taken--and the major domestic producer has held out against this significant importation. The domestic industry should not be penalized for attempting to remain in the market. For these reasons, and because I believe that an inflexible time period should not be adopted, I find that, based on this approach and the data above, there is an increase in imports.

Serious injury or threat thereof

In section 201(b)(2)(A) of the Trade Act of 1974, Congress provided some guidelines in determining serious injury. That section states--

(A) with respect to serious injury, the significant idling of productive facilities in the industry, the inability of a significant number of firms to operate at a reasonable level of profit, and significant unemployment or underemployment within the industry-- . . .

While these criteria are only some of the "economic factors" the Commission is directed to consider, it is significant that in this case all of the factors have been met.

Quimby, the largest domestic producer of birch door skins, has been forced to cease operations after being unable to operate profitably. * * *

The overall trend in the industry has been one of decreasing profits or increasing losses through the past several years.

* * *

In addition, largely as a result of the Quimby closure, employment in the industry dropped from approximately 400 to 100.

I believe that the domestic industry has been seriously injured, providing it can be established that the cessation of operations at Quimby has been "substantially caused" by increased imports.

Substantial cause

Next, the question of "substantial cause" must be considered. Regardless of the issues previously considered, no relief may be granted without a finding that there is "substantial cause" that the increased imports are responsible for the injury, or threat of injury, to the domestic industry.

Section 201(b)(4) provides some assistance in determining "substantial cause" when it states:

For purposes of this section, the term "substantial cause" means a cause which is important and not less than any other cause.

However, there are obvious difficulties in attempting to quantify whether a cause is "not less than any other cause." Factors which influence one investigation will not necessarily affect another.

Domestic usage of birch door skins has decreased consistently over a number of years, and the manufacturer of birch door skins is always at the mercy of housing construction. However, I do not believe that the cyclical nature of the housing industry caused Quimby to go out of business. I believe that the cyclical nature of the housing industry coupled with the increased high import penetration made Quimby more vulnerable and that I must take the industry as it is, even though it might be cyclical. Once this is done, I think it is established that the increased imports are a cause "not less than any other cause" of injury to the domestic industry and that the element of substantial cause is met.

Conclusion of findings

Having concluded that all statutory requirements have been met, I determine that birch door skins are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with birch door skins, and therefore, in the affirmative.

Recommended import relief

Although my determination is in the minority, and because of this the Commission is not required to make a recommendation of remedy, I still feel that I should state my views on the type of remedy I feel would have been appropriate had the majority agreed with my determination.

I believe the only remedy which would be both effective for the domestic industry and equitable for the consumers in this case would be that of a tariff quota for a period of 5 years. Under this remedy, imports entering within the quota would enter at the present duty of 7 1/2 percent, while

imports above the quota would enter at 32 1/2 percent. 1/ The quota level recommended would be 100 million square feet for the first year, with 5 million square feet increments for the remaining 4 years, provided the quota for the previous year was filled.

This approach would allow sizable imports to come into the country at the current duty level, and, by so doing, we would not be shutting off supplies to domestic manufacturing consumers, nor to the West Coast consumers who may not so easily be supplied by domestic producers. In addition, it would be beneficial and fair to the domestic industry because it would allow the producers a period of 5 years during which to adjust to import competition. Such an approach is preferable, in my opinion, to adjustment assistance, which is a statutory alternative.

It came to the attention of the United States International Trade Commission during this section 201 investigation that the United States Department of the Treasury is investigating the possibility of dumping of birch door skins by the Japanese manufacturers of birch door skins. I am aware that the Congress intended section 201 relief to be awarded only if

1/ There has been some controversy as to the extent of a duty increase in the tariff rate available to the Commission under section 201 investigations. Section 203(d)(1) provides:

No proclamation pursuant to subsection (a) or (c) shall be made increasing a rate of duty to (or imposing) a rate which is more than 50 percent ad valorem above the rate (if any) existing at the time of the proclamation.

My interpretation of this statute is that the maximum duty that could be recommended in this case would be 57 1/2 percent, which is the 50 percent increase allowed by the statute plus the 7 1/2 percent current duty.

the case did not fall under other specific relief provisions; such as, the Antidumping Act of 1921, the countervailing duty statute (section 203 of the Tariff Act of 1970), the unfair import practices statute (section 337 of the Tariff Act of 1930), or other remedies provided by law. Since the Commission cannot possibly act on the dumping case before the statutory deadline for acting on the section 201 case, I would apply the section 201 remedy, which could be rescinded by the President if a more appropriate relief were later to become available under alternate statutes.

#

INFORMATION OBTAINED IN THE INVESTIGATION

Introduction

Following receipt on April 18, 1975, of a petition filed by the Columbia Plywood Corp., a wholly owned subsidiary of the Columbia Corp., Portland, Oreg., the United States International Trade Commission, on May 12, 1975, instituted an investigation under section 201 of the Trade Act of 1974 to determine whether birch plywood door skins, i.e., plywood, with a face ply of birch, not exceeding in any dimension 5/32 inch in thickness, 47 inches in width, and 85 inches in length, provided for in item 240.14 of the Tariff Schedules of the United States (TSUS), are being imported into the United States in such increased quantities as to be a substantial cause of serious injury, or the threat thereof, to the domestic industry producing an article like or directly competitive with the imported article. A public hearing in connection with the investigation was held beginning on August 5, 1975, in the Commission's hearing room in Washington, D.C. 1/ The act directs the Commission to complete its investigation within 6 months--in this case, by October 18, 1975.

In recent years the Commission and other Federal agencies have conducted several investigations that pertained, at least in part, to birch plywood door skins. In 1965 the United States Tariff Commission (now the United States International Trade Commission) conducted an

1/ Notice of the Commission's investigation and hearing was published in the Federal Register of May 19, 1975 (40 F.R. 21791).

investigation under section 301 of the Trade Expansion Act of 1962 (TEA) in response to a petition filed by the General Plywood Corp., Louisville, Ky., for a determination of eligibility to apply for adjustment assistance (TEA-F-6, TC Publication 162, October 29, 1965). The Commission, being equally divided, made no affirmative finding on whether, as a result in major part of concessions granted under trade agreements, birch and lauan plywood door skins were being imported into the United States in such increased quantities as to cause, or threaten to cause, serious injury to that firm.

In February 1975 the Commission concluded an investigation undertaken in accordance with section 301 of the TEA in response to a workers' petition for the determination of eligibility to apply for adjustment assistance (TEA-W-259, ITC Publication 719). The Commission found unanimously that articles like or directly competitive with birch plywood door skins and birch veneer panels produced by Allen Quimby Veneer Co., Bingham, Maine, Division of Columbia Plywood Corp., a wholly owned subsidiary of Columbia Corp., Portland, Oreg., were not, as a result in major part of concessions granted under trade agreements, being imported into the United States in such increased quantities as to cause, or threaten to cause, the unemployment or underemployment of a significant number or proportion of the workers of such firm or an appropriate subdivision thereof.

In April 1975 the U.S. Department of Labor instituted an investigation in response to a petition filed on behalf of workers formerly engaged in the production of birch plywood door skins at the Allen Quimby Veneer Co., regarding certification of eligibility to apply for worker adjustment assistance as prescribed in section 222 of the Trade Act of 1974. In May the Department of Labor found that increases of imports like and directly competitive with the birch plywood door skins produced at the Quimby company contributed importantly to the total or partial separation of the workers of that firm, and certified all hourly and salaried workers of the firm who became totally or partially separated from employment on or after October 7, 1974, eligible to apply for adjustment assistance under title II, chapter 2, of the Trade Act of 1974.

The Commission, in accordance with the Trade Act of 1974, notified the Secretary of the Treasury that, on the basis of the facts available to it in its investigation No. TA-201-1 on birch door skins, it has reason to believe that the alleged increased imports are attributable in part to circumstances which come within the purview of the Antidumping Act, 1921, as amended. On October 10, 1975, the U.S. Department of the Treasury advised the Commission that birch three-ply door skins from Japan are being, or are likely to be, sold at less than fair value within the meaning of the Antidumping Act, 1921, as amended.

The information contained in this Commission report was obtained from a variety of sources: domestic manufacturers, importers, and purchasers of door skins; trade associations; the U.S. Customs Service; Dun and Bradstreet, Inc.; and the Commission's files.

Description and Uses

General

A door skin is a thin sheet of material used as the outer surface cover of a door. Door skins are manufactured from a variety of materials, including hardwood and softwood plywood, hardboard, and particle board.

Virtually the only use for door skins is in the manufacture of hollow-core flush doors. Two door skins, supported from within by a variety of frame types, make up a hollow-core flush door. Such doors are used predominantly in housing (single-family and multiple dwellings), but they are used in office and institutional buildings and industrial plants as well.

Description of Plywood Door Skins

Physical properties.--A plywood door skin is normally made of three plies of veneer glued together into a sheet which is about 1/8 inch thick and not more than 47 inches in width by 85 inches in length. Door skins for oversize doors exceed these dimensions, but such sizes constitute a small share of the total. The grain of the outer veneer plies (face and back) is generally oriented lengthwise in the panel, while the grain of the center ply (core) is at a right angle to that of the outer plies, or crosswise to the length of the panel. The face ply determines the wood species designation of the door skin. The core and back plies may be of different species than the face ply and are usually of lesser quality.

Plywood door skins are made in various types and grades and are constructed to meet the requirements of the door manufacturers. The principal factors determining the type and class of plywood door skins are listed below.

Species.--The surface plies are made from a variety of species, principally, in recent years, lauan, birch, and oak. Birch surface plies are much more costly than lauan, although less so than oak. The core plies are usually made of low-quality domestic hardwood or imported lauan veneers.

Size.--Door skins are generally 1/8 inch thick and are made to conform to U.S. standard flush-door sizes. A commonly used size is 30-1/2 inches by 80-1/2 inches (17 square feet).

Grade.--Door skins are graded according to the quality of the veneer of the face and back, with special emphasis on the face ply. The most commonly used domestic grades are premium, good, and sound. Further breakdowns by grade are sometimes made. A variety of standards are used by other countries.

Finish.--A clear finish is used to display and enhance the natural grain of plywood door skins; paint and other finishes may be used to cover an indistinct or unattractive grain.

Type of bond.--Plywood door panels are chiefly produced with either of two types of adhesive bonds. Type I plywood, with a fully waterproof bond to withstand full weather exposure, is produced for entrance and storm doors. Type II plywood, with a moisture-resistant

bond to withstand occasional wetting and drying, is commonly produced for use on interior doors. Type II bonding is the more common.

Method of Manufacture: Plywood Door Skins

The basic processes of plywood-door-skin manufacture consist of (1) cutting and drying the veneers, (2) matching the veneers, (3) applying adhesives, (4) pressure treatment, and (5) finishing.

Skilled workmanship and the use of precision machinery are vital.

The raw materials, both wood and adhesive, require special handling during the several stages of manufacturing.

Step 1.--Veneers, the principal component of plywood door skins, are thin sheets of wood cut at various angles to the axis of the log. Veneers are usually machine-peeled (rotary-cut) but may be sliced or sawn from logs or a portion of a log such as a block, cant, or flitch. Cutting methods vary, depending primarily on the desired configuration of the grain. Rotary-cut veneer is used on the less expensive doors, and matched sliced veneer on the more expensive doors. The veneers are dried following cutting to avoid splitting and checking and to obtain the desired dimensional stability.

Step 2.--The veneer is generally spliced out of necessity owing to defects in rotary-cut veneer and to the narrowness of sliced or cut veneer. The grade of spliced veneer depends in part on the exactness with which the configuration of grain can be matched. The veneer is cut and edge-glued by use of a splicing machine.

Step 3.--The kind of adhesive used, as stated above, varies depending on the intended use of the doors. The glue is applied by machine to both sides of the core veneer, and the face and back veneers are then laid on the core.

Step 4.--Immediately after gluing, the door skins are stacked into either a hot or a cold press, depending on the manufacturing process being used. The pressure and/or heat cures the glue and stabilizes the plywood door skins.

Step 5.--Door skins may be finished while still in the door-skin plant or after delivery to the door manufacturer, depending on the particular requirements of the door manufacturer. Normally, the door-skin producer will at least sand the door skin and touch up small defects such as knots and splits with glue, tape, or plywood plugs (sometimes called prefinishing) before shipment. The final finishing process may involve staining, varnishing, painting, printing, embossing, or overlaying and is generally done after the door has been assembled. The simpler finishing techniques such as staining or varnishing are often performed at the construction site, while the more sophisticated finishing techniques are usually performed by either the door manufacturer or the door-skin producer.

The first step described above, making the veneer, is done in a veneer mill, which may or may not be located with or as a part of a plywood door-skin mill. At the Quimby plant, the petitioner does have veneering facilities in its mill, as do a few other producers of

plywood door skins; plywood door-skin producers without veneering facilities must purchase their requirements of veneer. The second step is normally done in the veneer mill, but may also be done in the plywood operation. Steps three, four, and five are common to all plywood door-skin plants.

Byproducts.--The major byproduct of the veneering-plywood-door-skin process is waste veneer. The veneer pieces unusable for door skins can be cut to smaller sizes and shapes as required for making such articles as furniture or cabinet parts. Veneer waste may also be chipped for making paper or board products or may be burnt as a fuel in the plant or elsewhere. For Quimby, waste veneer was utilized in the manufacture of cabinet parts, an important part of its overall operations. For plywood-door-skin-plants without veneering operations, there is no waste veneer.

Description of Hardboard Door Skins 1/

Hardboard door skins are a more recent development than the traditional plywood door skins. They are produced in the same sizes as plywood door skins but are cut from a dense, grainless board made from wood which has been defibered and re-formed. Round logs

1/ One domestic door-skin manufacturer produces a skin of medium density particle board. While the manufacturing process is different, this skin exhibits the same general characteristics as a hardboard skin and in this report has been included for statistical purposes as a hardboard.

and timber, as well as mill residues such as edgings, trimmings, and cores, are used to obtain the fibers that are consolidated under heat and pressure to form the sheetlike panels. Synthetic resin is added in some manufacturing processes. Hardboard door skins are not as attractive in appearance as plywood door skins and are usually finished by painting, printing, or overlaying.

Materials Competing With Birch Door Skins

The U.S. International Trade Commission's survey of known domestic door-skin producers showed birch to be the species used most commonly in the domestic production of door skins prior to 1975. Oak was the second most commonly used species, with walnut and other specialty woods being less commonly used. At present, because of the recent closing of the largest domestic producing company of birch door skins, the production of oak skins is greater than that of birch. Imported plywood door skins are primarily of lauan and birch, but door skins of sen, shina, beech, oak, African mahogany, walnut, rosewood, and teak are also imported. Hardboard door skins, both domestic and imported, have come into increasing use in the last decade.

In low-cost housing, multifamily dwellings, and low-cost building construction, lauan and hardboard door skins now dominate the market once held by lauan plywood door skins. Depending on the consumers' preferences and cost requirements, lauan and hardboard door skins also compete, in varying degrees, with the other plywood door skins in higher cost building structures. The same equipment

can be used by the manufacturer to produce plywood door skins of almost any species. Therefore, substitution among various species of wood can readily occur, providing the wood resources are available and consumers' tastes so dictate.

There is a wide range of prices for the various kinds of door skins. Species such as African mahogany, rosewood, teak, and walnut are highly prized and command the highest prices. Oak, birch, maple, sen, beech, and shina are found in the middle range of door-skin prices, with lauan on the low end of the range. Hardboard door skins also are on the low end of the price range.

The petitioner states that birch door skins have a market distinct from other door skins. The Columbia Plywood Corp. asserts that "a birch doerskin is unique in that it has the desirable characteristics of a hardwood, namely, durability, attractive grain pattern, and ability to take a stain, while being less expensive than other hardwoods in common use. Because it is of much greater quality than lauan and other inexpensive materials it is not directly competitive with them."

The Question of Increased Imports

All Door Skins

U.S. imports of all door skins increased from 771 million square feet (MMSF) in 1970 to 959 MMSF in 1971, then declined to 884 MMSF in 1972, 777 MMSF in 1973, and 591 MMSF in 1974 (app. A, table 1). ^{1/} Imports in the first 6 months of 1975 totaled 270 MMSF, about 17 percent less than in the corresponding period of 1974.

The ratio of imports to apparent consumption of all door skins declined from 93 percent in 1970 to 91 percent in 1971 and 72 percent in 1972, but increased thereafter to 74 percent in 1973 and 78 percent in 1974. The ratio of imports to consumption during January-June 1975 increased further to 81 percent, compared with 75 percent during January-June 1974 (table 2). The large drop in the ratio in 1972 was chiefly attributable to the greatly expanded domestic production of hardboard door skins in that year. The increase in the ratio since 1972 has not been due to an increased volume of imports, but rather to a more rapid decline in domestic production than in imports.

In general, changes in aggregate U.S. imports of door skins are primarily attributable to changing conditions in the domestic construction industry, especially in the number of new housing units

^{1/} Official statistics on U.S. imports of door skins are available only for those having a face ply of lauan or birch and, for those species, only for years 1966 and later. Imports of other door skins beginning with 1970 were obtained from responses received by the Commission from questionnaires sent to all known importers, producers, and purchasers of door skins. Imports of wood doors, including those having door skins of birch, are discussed in a later section of this report.

started (app. B, fig. 1). Within the total, however, the relative importance of particular types of door skins may change over time, reflecting changing styles, tastes, and price relationships. About 66 percent of total U.S. imports of door skins during the January 1970-June 1975 period consisted of lauan; birch accounted for 17 percent of the total, other plywood (predominantly sen, beech, and shina, but also an increasing quantity of oak) for 7 percent, and hardboard for 10 percent (see table 3 for the rates of duty on selected types of door skins). Hardboard accounted for only 5 percent of aggregate imports of door skins in 1970, but its share of the total rose steadily to 16 percent in 1974. The increased share of hardboard in total imports was achieved principally at the expense of lauan, with which hardboard is most competitive on the basis of price. No domestic production of lauan, sen, shina, or beech door skins was reported for the January 1970-June 1975 period. Thus, the principal types of door skins of which there are imports as well as domestic production are birch, oak, and hardboard (tables 1, 4, and 5).

Imports of lauan door skins account for the great bulk of all plywood door skins consumed in the United States. Imports of lauan door skins increased from an estimated 4 MMSF in 1950 to 492 MMSF in 1966, when they were first classified separately. They reached a high of 708 MMSF in 1968, but then declined irregularly to 469 MMSF in 1973 and to 373 MMSF in 1974 (tables 6, 7, and fig. 2). In

January-June 1975 they totaled 172 MMSF, 16 percent less than in the corresponding period of 1974 (tables 8, 9, and fig. 3). The lauan door skins have entered largely in the Middle Atlantic and Gulf States and on the west coast (table 10). The imported lauan door skins accounted for 65 percent of total U.S. consumption of door skins in 1970 and 1971, but less than 50 percent in 1972-74, when hardboard door skins rose to about 30 percent of total consumption.

Prior to 1970, Japan was the principal supplier of lauan door skins, with Taiwan a close second. Since that time, however, Taiwan has been by far the principal supplier, while imports from Japan have dwindled and have, in fact, virtually ceased since 1973 (tables 7 and 8). The sen and shina door skins, as well as most of those of beech, were imported from Japan. U.S. imports of hardboard door skins came chiefly from Canada, Brazil, and a number of European countries.

Birch Door Skins

U.S. imports of birch door skins increased irregularly from an estimated 26 MMSF in 1950 to 122 MMSF in 1966, when they were first reported separately. They reached a high of 158 MMSF in 1968 and 1969, then declined irregularly to 126 MMSF in 1973 and 87 MMSF in 1974 (tables 6 and 11 and fig. 2). Imports in January-June 1975 totaled 59 MMSF, 22 percent greater than in the corresponding period

of 1974 (tables 12 and 13 and fig. 3). The increase in imports of birch door skins during January-June 1975, which is accented by the decline in aggregate U.S. imports of all door skins during the same period, is probably largely the result of the cessation of production by Quimby, which was by far the largest domestic producer of birch door skins.

The ratio of imports of birch door skins to apparent consumption of such door skins declined gradually from 89 percent in 1970 to 76 percent in 1973, and 77 percent in 1974. It reached 94 percent in January-June 1975, when domestic production was sharply reduced and imports increased compared with those in the corresponding period of 1974. The trend in imports of birch door skins relative to domestic production was more pronounced but similar to the ratio of imports to consumption. Imports were 7.8 times as large as domestic production in 1970, but by 1973 they were only 3.2 times as large. They subsequently increased (despite a decrease in actual imports) to 3.4 times domestic production in 1974 * * *

For the past decade Japan has been the principal U.S. supplier of birch door skins, accounting for more than half the number imported each year since 1966 (tables 11 and 12). Canada has generally been the second most important source, while Finland has supplied virtually all the remainder. U.S. imports of birch door skins from Finland, however, have declined greatly in the last 5

years. The birch door skins from Japan entered largely on the west coast and in the gulf and South Atlantic States. Imports from Canada entered in the northeastern and Great Lakes States, while those from Finland entered predominantly in the Atlantic and gulf States. No discernible shift in U.S. imports of birch door skins on a regional basis appears to have occurred, at least during the last several years (table 14).

The value of imported birch door skins ranged from \$10 million to \$15 million a year in 1966-72, totaled \$18 million in 1973 and fell to less than \$13 million in 1974 (table 11). Imports for January-June 1975 were valued at \$6.7 million, 13 percent less than during January-June 1974. The decline in value during January-June 1975, despite an increase in quantity, resulted from a decrease in the average unit value from \$160 per thousand square feet (MSF) in January-June 1974 to \$114 per MSF during January-June 1975.

Japanese birch door skins had a unit value, before duty and other costs, of \$74 to \$97 per MSF in 1966-72, compared with \$96 to \$105 for the Canadian article. In 1973 the unit value of the Japanese article increased by about half, to \$147, and that of the Canadian article by about a third, to \$138. In 1974 the unit value for the Japanese article declined to \$139, while that for the Canadian article rose to \$160 (fig. 4). The unit values of Japanese and Canadian birch door skins declined in January-June 1975 to \$97 and \$151, respectively.

Birch door skins imported from Canada are reported by trade sources to be comparable to the domestic product in quality and grading standards. Birch door skins imported from Japan are reported to be of a quality at least equal to, if not better than, that of the domestic or the Canadian product. The Japanese door skins are graded and sold somewhat differently from the domestic product. Virtually all birch door-skin imports from Japan consist of a 50-50 mixture or composite of AA grade (most comparable to U.S. premium grade) and AB grade (U.S. good grade). The door skins are sold at one price without a price differential according to grade. This differs from the common practice of domestic producers of selling each grade door skin at a different price; however, domestic producers do also sell door skins on a composite basis.

The great bulk of the birch door skins imported from Japan are handled through perhaps a dozen large Japanese trading companies that deal in a great number of products other than door skins. The trading companies purchase the door skins from the Japanese producers and in turn sell them to U.S. consumers, i.e., the flush-door producers. The trading companies may either import the door skins into the United States for subsequent resale or sell the door skins f.o.b. Japan, leaving the U.S. purchaser to arrange and pay for delivery expenses to the United States. The larger domestic flush-door producers tend to import for their own consumption, while the smaller producers generally buy from an

importer. Imports of birch door skins from Canada are customarily handled by direct contact between the U.S. producers of flush doors and the (two) Canadian birch door-skin producers. Purchases are generally made f.o.b. Canadian mill, with or without the duty paid. Shipment is then made by rail or truck, with the purchaser paying the delivery expenses from the Canadian mill to the United States.

Yearend inventories of door skins held during 1970-73 by importers responding to the Commission's questionnaire averaged about 5 percent of their annual shipments of door skins in this period. However, inventories held by such importers at the end of 1974 increased to 11 percent of their shipments of door skins during 1974. An especially sharp rise was reported for inventories of birch door skins. Yearend inventories of birch door skins, expressed as a percentage of the importers' annual shipments of such door skins, fell from 8 percent in 1970 to 2 percent in 1971 and 1972, but subsequently increased to 5 percent at the end of 1973 and jumped to 13 percent by the end of 1974.

The Question of Serious Injury to the Domestic Industry

U.S. Producers

There are about 180 hardwood plywood establishments and 31 hard-board establishments that have the capability to produce door skins but may or may not produce them depending on the prevailing market conditions.

Producers of hardwood plywood
and plywood door skins

Hardwood plywood.--There are about 180 establishments in the United States that produce hardwood plywood. They are concentrated in the Southeast, around the Great Lakes, and on the west coast. Currently, most plants (102) are operated by single-establishment firms; the others are owned by large multiestablishment firms. Total employment in the industry is about 32,800. Average employment per plant is about 185. The median sales figure for plywood producers reporting (124) is \$2 million; the median net worth for 93 producers is \$400,000.

About three-fourths of the hardwood plywood that is consumed in the United States is imported. This percentage appears to be increasing, as is shown in the following table:

Hardwood plywood: U.S. shipments, imports, and consumption,
selected years 1960 to 1973

Year	Ship- ments	Imports	Con- sumption	Ratio of imports to consumption	Ratio of imports to shipments
	Million sq. ft.	Million sq. ft.	Million sq. ft.	Percent	Percent
1960-----	886	1,015	1,899	53.4	114.6
1965-----	1,832	2,131	3,957	53.8	116.3
1970-----	1,615	4,168	5,774	72.2	258.1
1971-----	1,814	5,181	6,985	74.2	285.6
1972-----	1,954	6,427	8,360	76.9	328.9
1973-----	1,837	5,137	6,941	74.0	279.6

Source: U.S. Department of Commerce.

Exports are insignificant and are expected to remain minimal. The well-being of this industry is tied directly to that of the housing industry and, as such, shares periods of feast and famine; 35 hardwood plywood mills ceased operation between 1967 and early 1973, while 11 new mills were built. It is believed that these trends in mill closures and startups continued in 1974 and January-June 1975.

Plywood door skins.--In 1965, at the time of the first investigation on plywood door skins by the U.S. Tariff Commission, it was determined that about 40 out of approximately 200 hardwood plywood plants produced door skins. A number of these establishments stopped manufacturing door skins in the middle and late 1960's. Of the 180 establishments that produce hardwood plywood, 12 reported producing door skins in 1974. Four of these produced door skins

only for internal consumption. Seven plants are in Wisconsin, two in California, and one each in Maine, Virginia, and Georgia (fig. 5). Total employment is about 2,600. Seven plants are operated by single-establishment firms; the remainder belong to large multiestablishment firms. None of the independent firms has sales exceeding \$7.5 million, and most have sales less than \$2 million.

In 1973 these plants (including the Quimby plant that closed in 1974) had an annual capacity of about 70 million square feet of plywood (1/8-inch basis). According to industry representatives the domestic producers operated at about 80 percent of capacity during the peak year of production, 1973.

Birch door skins.--As indicated above, a plant capable of producing plywood door skins can produce door skins of virtually any species. Of the plants reporting birch-door-skin production in 1970-74 and January-June 1975, none reported producing birch door skins exclusively.

According to trade information, there were about 10 companies with 13 plants producing birch door skins in the United States in 1965. Seven plants no longer producing door skins are known to have been located on the east coast from New Hampshire to Georgia. It is estimated that the door-skin production of the 10 companies amounted to about 120 MMSF annually, or more than double the production of 1973, the peak year so far in the 1970's.

Seven plywood-door-skin producers reported manufacturing birch door skins sometime during 1970-74 and January-June 1975. These producers operated seven domestic establishments in which birch door skins were produced--five in Wisconsin, one in Maine, and one in Georgia.

The characteristics of the producing plants vary greatly. Four are owned by single-establishment companies, and three are owned by larger multiestablishment firms. Quimby's major product was birch door skins, but the plant also produced door skins of other species, as well as birch plywood cabinet parts. Patat Plywood Corp. produces exclusively door skins, mainly birch but some oak.

* * *

* * * * *

Producers of hardboard and hardboard
door skins

Hardboard.--There are approximately 31 plants that manufacture hardboard in the United States. The heaviest concentrations of plants are in the Northwest (Oregon has nine) and along the eastern seaboard. Plants range from relatively small (20 employees) to very large (1,000 employees); average employment per plant is about 300. Total employment throughout the country is nearly 10,000.

Production increased each year from 1968 to 1973, as shown below:

Hardboard: Estimated U.S. production, 1968-74

Year.	: Estimated	: Estimated value
	: domestic production	: of domestic production
	: <u>1,000 short tons</u>	: <u>Million dollars</u>
1968-----	1,282	205
1969-----	1,459	236
1970-----	1,463	243
1971-----	1,718	285
1972-----	1,908	327
1973-----	2,087	375
1974-----	1,882	<u>1/</u>

1/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Production capacity is about 8,000 tons per day, indicating that yearly capacity, on a one-shift, 5-day-workweek basis, is about 2.1 million tons. Annual capacity would be roughly 7 billion square feet on a 1/8-inch, converted-product basis.

The 31 hardboard plants are controlled by 15 firms; each of the plants except one is part of a multiestablishment firm. * * *

Hardboard door skins.--The producers of hardboard door skins are not readily differentiated from other hardboard manufacturers. The same presses are used to produce door skins as to produce many other types of hardboard, and it is possible to switch production from one product line to another with a minimum of difficulty.

* * * * *

Total employment in the plants is about 1,250, but only a small proportion of this number are involved directly with the manufacture of door skins.

Producers' Efforts To Compete With Imports

All door skins

* * * * *

Birch door skins

* * * * *

Birch Resources

In addition to being utilized for door skins, birch--primarily yellow birch--has long been in demand in the United States for other types of plywood, furniture, lumber, and miscellaneous wares of wood, such as shoe heels, toothpicks, and tongue depressors. This demand has resulted in widespread cutting of birch (in the continental United States), without regard to perpetuating the species. Such cutting, which has frequently exceeded growth, not only results in leaving in the forest the smaller and poorer quality trees, but also tends to reduce forest acreage containing birch of sawtimber size. As estimated by the U.S. Forest Service, the volume of yellow birch sawtimber, 1/ the principal birch species used for door skins in the United States, decreased from 11.6 billion board feet in 1963 to 7.3 billion board feet in 1970.

Competition for birch logs among the various types of manufacturers of forest products is keen. The price level for standing birch timber or for birch logs results, in part at least, from the market price of products manufactured from birch. The price levels of such products are affected, of course, by a variety of elements. None, however, are believed to be more significant than the price depressant effect of imported birch and lauan plywood door skins or hardboard door skins on the market price of birch door skins. As a consequence, therefore,

1/ Saw logs suitable for the manufacture of plywood compose an unknown portion of total sawtimber volumes.

manufacturers of other products of birch are frequently able to outbid the manufacturers of door skins for the better birch trees or logs. * * *

In contrast to the declining volume of birch in the United States, birch resources in Canada increased from 1963 to 1973 and are estimated to be about four times those in the United States. The availability of birch in Japan is not known; however, the supply of birch on the island of Hokkaido is reported to be about 20 percent of the U.S. supply. Finnish birch volume is believed to be about 75 percent of the U.S. volume. The supply of birch in the U.S.S.R. is unknown but is believed to be much larger than that in the United States. None of these countries can be regarded as an unrestricted source of birch logs. Of the countries mentioned above, only Canada and Japan can be considered as reliable and continuing sources of birch door skins in quantity.

U.S. Purchasers

General description

Flush-door manufacturers, which are virtually the only market for door skins, operate about 74 establishments in the United States; 45 plants are operated by single-establishment firms, and 29, by multiestablishment firms. Primary concentrations are around the Great Lakes, along the west coast, and in the timber-producing areas of the southeast and northeast (fig. 6). Total employment is about 9,500, approximately 130 per plant.

The industry is a relatively new one with the newest firms being the smallest. Of the 13 firms established since 1970, none employ more than 200 people, and the average number employed is about 70. The average age of single-establishment firms is 14 years; and that of multiestablishment firms, 25 years. Of 34 firms reporting net worth, the median is \$500,000, and of 52 firms reporting sales, the median is \$5 million. For the larger companies, flush-door sales account for only a very small part of total sales.

The value of flush-door shipments was \$369 million in 1972, up from \$202 million in 1967 (table 15). The number of doors produced increased from about 28 million to about 39 million in the same period. Roughly 80 percent of the hollow-core doors are produced with a face of hardwood plywood, of which doors about 24 percent have birch, 3 percent, oak, and 73 percent, lauan. The industry depends on imports for more than 90 percent of its hardwood plywood door skins.

Shipments of flush doors with hardwood faces increased from \$176 million in 1967 to \$280 million in 1972, but their share of shipments of all types of flush doors fell from about 87 percent to 76 percent for the years indicated. On the basis of fragmentary data, it is believed that flush doors with hardboard faces may have increased their share (based on value) of all types of flush doors from about 5 percent in 1967 to about 15 percent in 1972.

Imports of wood doors

Imports of all wood doors, of which flush doors are known to constitute a significant number, increased in value from \$4.7 million in 1970 to \$11.3 million in 1973, then declined to \$9.8 million in 1974. In January-June 1975, they totaled \$3.2 million, compared with \$5.3 million for the comparable period of 1974. Mexico and Taiwan are the primary sources of imports. In 1970 and since, these two countries have consistently accounted for about 65-75 percent of U.S. imports (tables 16-18). Imports from Mexico under item 807.00 increased from \$250,000 in 1970 to \$1.1 million in 1974, rising from about 5 percent of the value of total imports to nearly 12 percent. ^{1/} During 1973 and 1974 the bulk of imports of wood doors entered through the customs districts of El Paso and San Juan. Sizable quantities also entered through the districts of Los Angeles and Seattle (table 19).

^{1/} The classification of these doors under item 807.00 results from the use of U.S.-made hardware, such as hinges, screws, door guides, and handles, in the assembly of the door in Mexico.

On the basis of official statistics for 1965 and earlier years as well as fragmented questionnaire data, it is estimated that imports of flush doors totaled about 55 to 65 percent of total imports of wood doors in the 1970's. ^{1/} Hollow-core flush doors maintained a fairly stable portion of imports of flush doors over the period, representing an estimated 78 percent of imports in 1975 compared with an estimated 82 percent of imports in 1970.

Prices of imported solid-core and hollow-core flush doors peaked in 1974. Solid-core doors showed the widest range of prices over the 1970-74 and January-June 1975 period, with average annual prices varying by up to \$2.85. Hollow-core doors showed a 93-cent range in average annual prices.

For imports of flush doors reported, the following table shows the percentage having door skins of birch, lauan, and other plywood, and of hardboard.

Percentage distribution of U.S. flush door imports for consumption, by type of door skin, 1970-74

Type of door skin	1970	1971	1972	1973	1974
Birch plywood-----	10	10	9	10	9
Lauan plywood-----	66	69	68	73	70
Other plywood-----	5	5	7	4	6
Hardboard-----	19	16	16	13	15
Total-----	100	100	100	100	100

Source: Compiled from responses to U.S. International Trade Commission questionnaires.

^{1/} The statistical category for imports of flush doors was discontinued in 1966.

While imports of flush doors appear to be sizable, ranging from an estimated annual total of about 550,000 to 850,000 doors during the 1970-74 period, imports were equivalent to less than 5 percent of the domestic shipments of wood doors as reported in the Census of Manufactures, 1972, published by the U.S. Department of Commerce.

U.S. Shipments, Production, Exports, and Inventories

All door skins

<u>Total shipments.</u>	*	*	*	*	*
-------------------------	---	---	---	---	---

*	*
---	---

U.S. producers' shipments of plywood door skins, the greatest share of which are market shipments, generally followed the same trend as shipments of all door skins, but the annual changes were much more moderate. Such shipments increased from 29 MMSF in 1970, to 62 MMSF in 1973, and then declined to 46 MMSF in 1974. In January-June 1975, shipments of plywood door skins did not recover much from the low point in 1974; shipments in April-June 1975 amounted to 7 MMSF compared with 5 MMSF in October-December 1974.

Shipments of hardboard door skins, of which captive shipments are an important share, have dominated door-skin shipments since 1972.

* * *

The composition of shipments of plywood door skins has changed somewhat in the last decade. At the time of the 1965 investigation, domestic producers manufactured plywood door skins predominantly of birch, oak, and gum. By the early 1970's, birch and oak were the leading species, with the other hardwood species being insignificant.

Captive shipments.--Some door-skin manufacturers produce door skins for their own use in manufacturing doors. Captive shipments of door skins were very large in 1972 (70 percent of total shipments) as a result of the entry into production of one large producer of hardboard door skins (table 22). Captive shipments have since declined greatly in importance, being less than 20 percent of total shipments in April-June 1975. Generally, in years of high sales, captive shipments of plywood door skins have constituted less than 10 percent of total shipments of such door skins. In periods of low plywood door skin sales such as 1970 and January-June 1975, the percentages were 23 and 18 respectively.

Exports.--U.S. exports of door skins are known to be very small relative to total shipments. The only known exports during the period

covered were of hardboard door skins, which amounted to about 3 percent of U.S. shipments of hardboard door skins in 1974 and about 2 percent in January-June 1975.

Inventories.--Five door-skin plants reported carrying inventories of door skins during some portion of the period December 1969-June 1975. All other firms indicated that no inventories were maintained. Yearend inventories, which consisted entirely of plywood door skins, rose from 3.9 MMSF in 1969 to 5.0 MMSF in 1970, the high for the period. They decreased in 1971 and in 1972, reaching a low of about 2.1 MMSF in the latter year. Subsequent yearend and end-of-quarter inventories fluctuated between 2.1 MMSF and 2.9 MMSF (table 24 and fig. 7).

Birch door skins

Total shipments.--Shipments of birch door skins in 1970-74 increased each year from 18 MMSF in 1970 to a high of 39 MMSF in 1973, then decreased to 26 MMSF in 1974 (table 4). Shipments in 1974 decreased from 9 MMSF in January-March to 2 MMSF in October-December, when Quimby went out of production. Quarterly shipments of birch door skins continued to decrease, to less than 1 MMSF in January-March 1975, and only rose to somewhat less than 2 MMSF in April-June. * * *

The trend in production of birch door skins closely followed the trend in shipments (tables 4 and 23).

Captive shipments.--Captive shipments of birch door skins rose during 1970-73, * * * they decreased somewhat in 1974 and remained at approximately that level (on an annual basis) during January-June 1975. * * *

Exports.--There were no known exports of birch plywood door skins during the period January 1970 to June 1975.

Inventories. * * * * *

U.S. Employment

All door skins

As indicated previously, domestic producers of door skins range from small companies manufacturing door skins as their major product to large multiproduct companies for which door skins represent only a very minor part of their overall operations. There is likewise a large variation in employment patterns among the door-skin producers. The small producers often employ workers whose function is almost exclusively to manufacture door skins. Employees of the larger producers, especially those that manufacture hardboard door skins, may spend only a small part of their time on door skins.

Total employment in domestic establishments in which door skins were produced is estimated to have ranged between 3,500 and 4,500 persons during 1970-74. However, only a portion of the total, perhaps a fourth, were actually engaged in the production of door skins. * * *

the manufacture of such door skins is relatively less labor intensive than the manufacture of plywood door skins.

Birch door skins

The number of production and related workers engaged in the production of birch door skins is estimated to have ranged between

300 and 400 during 1970-74. No discernible trend in such employment was evident until late 1974, when the number employed dropped abruptly to fewer than 100. The cause of the abrupt decrease at that time was, of course, the cessation of production by the Quimby plant, which alone employed close to 300 persons just prior to closing. Man-hours worked by production and related workers on birch door skins generally followed the trend in production of such door skins, rising from 1970 to 1972, peaking in 1973 (at an estimated 800,000), but then declining sharply in 1974 (to an estimated 550,000). Wages paid to such employees totaled about \$2 million in 1974.

Complete data on employment of workers engaged in the production of birch door skins during 1975, along with man-hours worked by and wages paid to such employees, are not available, but there can be no doubt that all have declined greatly inasmuch as domestic production of birch door skins in January-June 1975 was only about one-eighth of the amount in the corresponding period of 1974.

Prices 1/All door skins

Prices of door skins are normally quoted per thousand square feet. Neither domestic producers nor importers use published price lists, relying instead on direct negotiations with their customers, i.e., the flush-door producers. The flush-door producers generally purchase door skins every 1 to 3 months after contacting various potential suppliers for price quotations, delivery schedules, and other details. Prices of door skins vary by grades; premium grade commands the highest prices, followed in order by good and sound grades. As noted previously, however, virtually all birch door skins imported from Japan are sold only in a composite grade without a price differential according to grade.

As is true for many other products, most purchasers of door skins wish to maintain multiple sources of supply. Many appear willing to pay somewhat more (perhaps 5 to 10 percent) for domestic door skins than for the imported product in order to insure a domestic source of supply. U.S. producers' prices for door skins have generally been somewhat higher than importers' prices; however, domestic producers have the competitive advantage of shorter delivery times, and they are generally willing to deal in smaller quantities than are most importers.

1/ Throughout this section, the expression "average price" is used to mean the average of the lowest prices paid by domestic flush-door producers for the product in question.

Table 25 and figure 8 show the average prices paid for various kinds of door skins by U.S. flush-door producers during the period 1970-74 and January-June 1975. As indicated in table 25, the average price of oak door skins is considerably higher than that of birch door skins. On the other hand, the average prices of lauan and hardboard door skins are substantially lower than the average price of birch door skins. Although not shown, the prices of door skins of species such as teak, rosewood, and walnut are higher than those of birch door skins, while the prices of imported sassafras, beech, and shina door skins are somewhat lower than those of birch door skins but higher than those of lauan door skins.

In general, the prices of all kinds of door skins tended to move together during the 1970-74 and January-June 1975 period. The most noticeable feature in the trend of door skin prices during the period was the rapid rise during 1973, followed by a general decline beginning in July-December 1974. This was particularly noticeable for prices of imported door skins. As indicated previously, the principal determinant of the domestic demand for door skins is the number of residential housing starts in the United States. The large price increases in 1973 undoubtedly resulted in good measure from the continuing large number of housing starts in the United States. To some extent, however, increases in the prices of imported door skins must have resulted also from the devaluation of the U.S. dollar in February 1973. ^{1/}

^{1/} An earlier devaluation of the U.S. dollar in December 1971 appears not to have had much effect on the prices of imported door skins.

Table 26 and figure 9 show U.S. wholesale price indexes for hardwood plywood and various other commodities. They show that wholesale prices received by U.S. producers for hardwood plywood remained relatively stable during 1968-72, rose rapidly during 1973 and January-September 1974, declined during October-December 1974 and January-March 1975, and then rose slightly in April-June 1975. The wholesale prices of hardwood plywood have not increased nearly as rapidly since 1967 as the wholesale prices of all commodities and of all lumber and wood products. On the other hand, however, prices of hardwood plywood have increased more rapidly than those of hardboard and particle board.

Birch door skins

The average prices paid for domestically produced and imported birch door skins, as reported by U.S. flush-door producers, are shown in table 25. The average price paid domestic producers declined from \$119 per MSF in 1970 to \$115 per MSF in 1971, then rose almost without interruption to a high of \$181 per MSF in April-June 1974. The average price then declined during July-December 1974 and settled at \$165 per MSF during January-June 1975. Prices of imported birch door skins increased without interruption from \$93 per MSF in 1970 to a high of \$188 per MSF in July-September 1973. They then began a steady decline, reaching a bottom of \$125 per MSF in January-March 1975, but turned upward in April-June 1975, when they averaged \$150 per MSF.

As shown in figure 8, prices of domestic birch door skins were substantially above the prices of imported birch door skins in 1970, but the difference began to narrow in 1971 and early 1972. Importers' prices remained lower but close to U.S. producers' prices in July-December 1972 and January-June 1973. During July-December 1973 the average price of imported birch door skins exceeded that of the domestic product. The prices of domestic birch door skins again were higher than those of imported door skins in January-September 1974, but the difference was not large. However, in October-December 1974 and January-March 1975, importers' prices dropped sharply while U.S. producers' prices declined only moderately; during that period imported birch door skins were selling at an average price some \$40 per MSF lower than that received by domestic producers. In April-June 1975 the price difference again narrowed as importers' prices rose while domestic prices remained unchanged.

Complete data on prices received by importers by country of origin of the imported birch door skins are not available. However, from figure 4, it appears evident that the large decline in the price of imported birch door skins extending from July-September 1973 through January-March 1975 resulted chiefly from price reductions by the Japanese; during that time the average unit value of U.S. imports from Canada remained relatively stable. On the other hand, the prices of both Japanese and Canadian door skins rose rapidly during most of 1972 and January-September 1973.

Information submitted at the Commission's hearing indicated that the Canadian birch door skins are generally sold in the United States at prices similar to those received by domestic producers.

Table 27 shows an index of Japanese export prices for birch plywood, a large percentage of which is believed to consist of door skins, by months, for January 1970-June 1975. The table indicates that Japanese export prices for birch plywood in 1974 declined by almost 50 percent between February and November. Since that time, however, Japanese prices have increased substantially, although they are still below the levels reached in the corresponding months of 1973 and 1974.

Financial Experience of U.S. Producers

* * * * *

* * * * *

Overall operations of the establishments
in which door skins are produced

Total net sales of all products produced in the establishments in which door skins were produced increased steadily from \$243.3 million in 1970 to a 5-year high of \$482.5 million in 1974 (representing an increase of 98.3 percent). Interim data for 1975 showed net sales of \$236.4 million (app. C, table 1). * * *

A-45

* * * * *

Birch plywood door skins

* * *

A-46 through A-47

* * * * *

The Question of Imports as a Substantial Cause of Injury

U.S. Consumption

All door skins

Annual U.S. consumption of door skins of all materials increased rapidly in the 1950's, as wood flush doors in which they were used replaced panel wood doors (stile and rail) in residential construction, and a market developed, to some extent, in business construction. In recent years, annual consumption has fluctuated markedly in response to a changing volume of construction. U.S. consumption of all door skins rose * * * in 1972 (table 4 and fig. 10). Thereafter consumption declined, amounting to * * * in 1974. After bottoming out in the last quarter of 1974, consumption rose in January-June 1975. Quarterly consumption of door skins in January-June 1975 averaged * * * compared with about * * * in the last quarter of 1974.

In the early 1970's (i.e., 1970 and 1971), plywood door skins supplied the great bulk * * * of domestic consumption of door skins, and hardboard door skins accounted for nearly all of the remainder (table 4). In 1972-74 the share of consumption accounted for by plywood door skins declined * * *

as the use of hardboard door skins became more widely established. In January-June 1975, however, the share accounted

for by plywood increased to about 77 percent, as the use of hardboard declined more sharply than that of plywood. During the 1970's, as shown in the tabulation below, door skins of birch plywood held a more stable share of the market than all plywood door skins, door skins of lauan, or door skins of hardboard.

The share of the U.S. market accounted for by door skins of various materials in the 1970's averaged as follows:

Door skins: Percentage distribution of U.S. market, by types, for specified periods, 1970-74 and January-June 1975

Period	Plywood			Hardboard
	All species	Lauan	Birch	
1970-71-----	*	*	18	*
1972-74-----	*	*	15	*
January-June 1975-----	*	*	19	*

Source: Compiled from official statistics of the U.S. Department of Commerce and from information supplied by domestic producers.

Imports of door skins of all types as a percent of total consumption decreased significantly during the period. With the expansion of domestic hardboard production and the steady decline in total imports since 1971, total imports as a percent of total consumption decreased * * * in 1970 to * * * 1972, but rose in 1973 and in 1974 * * *

(table 2).

Birch door skins

Consumption of birch door skins peaked at 189 MMSF in 1972, rising from 162 MMSF in 1971, but then decreased to about 113 MMSF in 1974. During the last quarter of 1974, when Quimby ceased production, consumption of birch door skins totaled only about 12 MMSF. Consumption rose in January-June 1975 to 62 MMSF, about 9 percent less than during the corresponding period of 1974. The ratio of imports of birch door skins to consumption of such door skins declined gradually from 89 percent in 1970 to 76 percent in 1973, but increased slightly to 77 percent in 1974 and to 95 percent in January-June 1975 (table 2).

The trend in consumption versus
the trend in housing

According to industry sources, an average of 34 square feet of door skins is used in the production of a flush door. The number of flush doors required per private housing start varies considerably ranging, perhaps, from 10 to 20. In new housing, therefore, requiring 15 flush doors, about 510 square feet of door skins would be used. It should be noted, however, that extensive use of flush doors are made for such purposes as remodeling older housing and in mobile homes. Taking in account, therefore, the variety of uses of flush doors and of the number of such doors utilized in a given situation, the rough estimate of 510 square feet of door skins per housing start is supported by the data in the following table comparing

housing starts with the consumption of door skins of all materials and of birch during January 1970-June 1975. As indicated in the table, on the average, the equivalent of * * square feet of door skins of all types and nearly 90 square feet of birch door skins were used annually per housing start during the period.

New private housing starts in the United States and consumption therein of all door skins and of birch door skins, total and per housing start, 1970-74 and January-June 1975

Period	New private 1/ housing starts	Consumption of door skins			
		Total quantity		Per housing start	
		All door skins	Birch door skins	All door skins	Birch door skins
		Million sq. ft.	Million sq. ft.	Sq. ft.	Sq. ft.
1970-----	1,434	*	171	*	119
1971-----	2,052	*	162	*	79
1972-----	2,357	*	189	*	80
1973-----	2,045	*	165	*	81
1974-----	1,338	*	113	*	84
Jan.-June 1975-----	2/ 515	*	62	*	120
Total or average,					
Jan. 1970-					
June 1975-----	9,741	*	862	*	88

1/ Public housing starts are small in relation to private housing starts.

2/ Seasonally adjusted.

Source: Private new housing starts, from official statistics of the U.S. Department of Commerce; consumption, from table 4 in this report.

It is interesting to note from the table above that the quantity of all door skins per housing start decreased * * * in 1970 to * * * 1974; the comparable quantity of birch door skins dropped from 119 to 84 over the same period.

Price Relationships Between Imported
and Domestic Birch Door Skins

In the import section of the report (pp. A-16-17), the average prices of all imported birch door skins and imports by country are compared with the average prices of domestically produced birch door skins.

The costs of exporting birch door skins from foreign countries to the United States constitute a significant share of the total average cost of the door skins. A breakdown of these costs for a specific 5-month period in 1974 is given in the table below.

Costs of exporting birch door skins to the United States
from selected countries, January-May 1974 ^{1/}

(In U.S. dollars)			
Item	Country of export		
	Japan	Canada	Finland
Value at port of export ^{2/} -----	\$151.63	\$159.26	\$220.76
Freight ^{3/} -----	16.45	-	24.09
Insurance ^{4/} -----	1.52	-	2.21
Value at U.S. port of entry ^{5/} ---	169.60	159.26	247.06
Duty charges ^{6/} -----	11.40	11.89	19.52
Brokerage charges ^{7/} -----	3.03	3.19	4.42
Total landed costs-----	184.03	174.34	271.00

^{1/} TSUSA Commodity by Country of Origin (FT 146) was last issued for this period of time.

^{2/} Free along side (f.a.s.) value.

^{3/} Derived by subtraction of value at port of export and insurance from value at U.S. port of entry.

^{4/} Estimated from Customs Form 6431 to be about 1 percent of value at port of export.

^{5/} Cost, insurance, and freight (c.i.f.) value.

^{6/} Calculated as 7.5 percent ad valorem of customs imports value (CIV).

^{7/} Estimated to be about 2 percent of U.S. port of entry value.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Exporting costs accounted for 18 percent of Japanese average total costs and 19 percent of Finnish average total costs, but only 9 percent of Canadian average total costs of exporting birch door skins.

APPENDIX A
STATISTICAL TABLES

Table 1.--Door skins: U.S. imports for consumption, ^{1/} by types, 1970-74 and, by quarters, 1974 and January-June 1975

Face-ply material	1970	1971	1972	1973	1974					1975		
					Total	Jan.-Mar.	Apr.-June	July-Sept.	Oct.-Dec.	Jan.-June	Jan.-Mar.	Apr.-June
Quantity (million square feet)												
Birch-----	153	132	151	126	87	25	23	28	10	59	34	25
Lauan-----	539	685	579	469	373	116	88	127	42	172	47	125
Sen-----	13	19	25	21	14	4	4	5	2	6	3	3
Shina-----	9	14	20	15	8	2	2	3	1	3	2	1
Beech-----	14	25	24	18	8	2	2	3	1	3	2	1
Oak-----	2/	2	3	6	5	2	1	2	1	1	1	2/
Walnut-----	2/	-	2/	-	-	-	-	-	-	-	-	-
Other plywood-----	2/	2/	2/	1	1	2/	2/	2/	2/	2/	2/	2/
Total plywood-----	729	877	803	657	497	152	121	167	57	245	89	156
Hardboard-----	42	81	81	121	94	29	23	32	10	26	7	19
Total door skins-----	771	959	884	777	591	181	143	199	67	270	96	174
Value (1,000 dollars)												
Birch-----	11,665	11,170	15,114	18,146	12,981	3,967	3,718	4,141	1,154	6,712	3,336	3,376
Lauan-----	22,383	27,619	21,472	27,077	24,515	7,807	6,711	8,242	1,755	8,232	1,954	6,278
Sen-----	851	1,382	2,199	2,977	1,809	561	525	579	163	678	339	339
Shina-----	526	917	1,576	1,745	955	296	277	306	86	356	178	178
Beech-----	975	1,650	1,870	1,993	1,073	333	311	343	97	280	140	140
Oak-----	23	222	438	905	997	305	285	318	89	203	101	102
Walnut-----	2	-	10	-	-	E -	-	-	-	-	-	-
Other plywood-----	8	8	7	124	94	E 29	27	30	8	41	20	21
Total plywood-----	36,433	42,968	42,686	52,967	42,424	13,298	11,854	13,959	3,352	16,502	6,068	10,434
Hardboard-----	1,731	2,756	2,419	5,270	5,442	1,741	1,469	1,850	781	1,199	288	911
Total door skins-----	38,164	45,724	45,105	58,237	47,866	15,039	13,323	15,809	3,733	17,701	6,356	11,345
Unit value (per 1,000 square feet) 3/												
Birch-----	\$76.09	\$84.66	\$99.98	\$144.05	\$148.76	\$157.64	\$159.57	\$145.42	\$111.90	\$113.75	\$96.69	\$137.78
Lauan-----	41.49	40.33	37.10	57.73	65.68	67.17	76.41	64.79	41.82	47.85	41.81	50.10
Sen-----	66.84	72.11	86.66	139.50	127.31	136.86	138.34	124.87	96.97	114.92	99.71	135.60
Shina-----	61.13	64.03	77.87	118.84	117.78	126.60	127.94	115.69	89.68	104.71	89.00	127.14
Beech-----	67.25	65.19	77.82	109.47	139.48	150.14	151.49	136.71	106.59	93.33	82.35	107.69
Oak-----	99.14	142.49	136.11	144.73	182.27	193.28	195.21	178.15	137.56	203.00	168.33	255.00
Walnut-----	181.82	-	185.19	-	-	-	-	-	-	-	-	-
Other plywood-----	46.78	50.96	34.48	120.74	165.78	176.83	178.81	162.16	119.40	205.00	200.00	210.00
Total plywood-----	49.97	48.98	53.16	80.68	85.44	87.61	98.17	83.36	59.27	67.48	68.15	67.09
Hardboard-----	40.84	33.88	29.77	43.69	57.76	59.61	64.97	57.75	36.76	46.60	41.46	48.50
Total door skins-----	49.47	47.70	51.01	74.94	81.02	83.09	92.93	79.25	55.79	65.49	66.22	65.09

^{1/} All data are estimated except the figures for doorskins of birch and lauan.^{2/} Less than 500,000 square feet.^{3/} Calculated from unrounded figures.

Source: Imports of birch and lauan, from official statistics of the U.S. Department of Commerce; other imports, from data obtained by the Commission from importers, purchasers, and producers of door skins.

Note.--Because of rounding, figures may not add to the totals shown.

Table 2.--Door skins: Ratios of imports of birch door skins and of all door skins to production and consumption of door skins, as specified, 1970-74 and, by quarters, 1974 and January-June 1975

(In percent)							
Period	Ratio of imports of birch to--				Ratio of total imports to--		
	Production of birch	Total production	Consumption of birch	Total consumption	Total production	Total consumption	
1970-----	782	*	89	*	*	*	*
1971-----	476	*	81	*	*	*	*
1972-----	410	*	80	*	*	*	*
1973-----	324	*	76	*	*	*	*
1974-----	336	*	77	*	*	*	*
January-March-----	249	*	74	*	*	*	*
April-June-----	286	*	72	*	*	*	*
July-September-----	450	*	82	*	*	*	*
October-December-----	633	*	83	*	*	*	*
1975:							
January-March-----	3,837	*	97	*	*	*	*
April-June-----	1,836	*	93	*	*	*	*

Source: Compiled from official statistics of the U.S. Department of Commerce and from information supplied by domestic producers.

Note.--All the ratios presented here are based on estimated data.

Table 3.--Selected wood door skins and wood doors:
U.S. rates of duty, by commodity, 1975

Commodity	TSUS number	Rate of duty	
		Col. 1	Col. 2
		Percent ad valorem	Percent ad valorem
Birch plywood door skins-----	240.14	7.5	50
Lauan plywood door skins-----	240.17	20	40
Hardboard door skins			
(not face finished)-----	245.00	7.5	30
	245.10	7.5	30
	245.20	7.5	30
Hardboard door skins			
(face finished)-----	245.30	15	45
Wood doors-----	206.30	7.5	33-1/3

Source: Tariff Schedules of the United States Annotated (1975).

Table 4.--Door skins: Estimated U.S. shipments, imports, exports, and apparent consumption, 1970-74 and by quarters, 1974 and January-June 1975

(In millions of square feet)																
Period	Shipments <u>1/</u>				Imports					Exports <u>2/</u>		Apparent consumption				
	Birch	Other plywood	Hard-board	Total	Birch	Lauan	Other plywood	Hard-board	Total	Hard-board	Total	Birch	Lauan	Other plywood	Hard-board	Total
1970-----	18	11	*	*	*153	*539	36	42	771	-	-	171	539	47	*	*
1971-----	30	17	*	*	*132	*685	60	81	959	-	-	162	685	78	*	*
1972-----	38	22	*	*	*151	*579	73	81	884	-	-	189	579	95	*	*
1973-----	39	23	*	*	*126	*469	62	121	777	-	-	165	469	85	*	*
1974-----	26	20	*	*	*87	*373	36	94	591	4	4	113	373	56	*	*
Jan.-Mar-----	9	6	*	*	*25	*116	10	29	181	1	1	34	116	16	*	*
Apr.-June-----	9	6	*	*	*23	*88	10	23	143	1	1	32	88	16	*	*
July-Sept-----	6	5	*	*	*28	*127	12	32	199	1	1	34	127	17	*	*
Oct.-Dec-----	2	3	*	*	*10	*42	4	10	67	1	1	12	42	7	*	*
1975:																
Jan.-Mar-----	1	4	*	*	*34	*47	8	7	96	-	-	35	47	12	*	*
Apr.-June-----	2	5	*	*	*25	125	6	19	174	1	1	27	125	10	*	*

*Data reported in official statistics.

1/ Does not include lauan, shipments of which are known to be small.

2/ Exports, not separately reported, are known to be small.

Source: Compiled from official statistics of the U.S. Department of Commerce and from information supplied by producers.

Note.--Because of rounding, figures may not add to the totals shown.

Table S.--Plywood door skins other than birch and lauan: Estimated U.S. shipments, imports, and apparent consumption, by species, 1970-74 and, by quarters, 1974 and January-June 1975

(In thousands of square feet)							
Period	Beech	Oak	Sen	Shina	Walnut	Miscellaneous plywood	Total
Shipments							
1970-----	-	10,128	-	-	228	190	10,546
1971-----	-	16,157	-	-	256	331	16,744
1972-----	-	20,951	-	-	286	505	21,742
1973-----	-	21,841	-	-	292	410	22,543
1974-----	-	19,286	-	-	320	432	20,038
January-March-----	-	5,627	-	-	99	108	5,834
April-June-----	-	5,804	-	-	56	112	5,972
July-September-----	-	4,913	-	-	53	97	5,063
October-December-----	-	2,942	-	-	112	115	3,169
1975:							
January-March-----	-	3,887	-	-	48	159	4,094
April-June-----	-	4,593	-	-	62	145	4,800
Imports							
1970-----	14,499	232	12,725	8,611	11	171	36,249
1971-----	25,316	1,558	19,169	14,327	-	157	60,527
1972-----	24,034	3,218	25,377	20,233	54	203	73,119
1973-----	18,205	6,253	21,343	14,683	-	1,027	61,511
1974-----	7,690	5,470	14,212	8,107	-	567	36,046
January-March-----	2,218	1,578	4,099	2,338	-	164	10,397
April-June-----	2,053	1,460	3,795	2,165	-	151	9,624
July-September-----	2,509	1,785	4,637	2,645	-	185	11,761
October-December-----	910	647	1,681	959	-	67	4,264
1975:							
January-March-----	1,700	600	3,400	2,000	-	100	7,800
April-June-----	1,300	400	2,500	1,400	-	100	5,700
Apparent consumption							
1970-----	14,499	10,360	12,725	8,611	239	361	46,795
1971-----	25,316	17,715	19,169	14,327	256	488	77,271
1972-----	24,034	24,169	25,377	20,233	340	708	94,861
1973-----	18,205	28,094	21,343	14,683	292	1,437	84,054
1974-----	7,690	24,756	14,212	8,107	320	999	56,084
January-March-----	2,218	7,205	4,099	2,338	99	272	16,231
April-June-----	2,053	7,264	3,795	2,165	56	263	15,596
July-September-----	2,509	6,698	4,637	2,645	53	282	16,824
October-December-----	910	3,589	1,681	959	112	182	7,433
1975:							
January-March-----	1,700	4,487	3,400	2,000	48	259	11,894
April-June-----	1,300	4,993	2,500	1,400	62	245	10,500

Source: Compiled from information supplied by domestic producers.

Table 6.--Birch and lauan door skins: U.S. imports for consumption,
1950-74 ^{1/}

(In millions of square feet)

Year	Birch	Lauan
1950-----	26	4
1951-----	25	9
1952-----	31	12
1953-----	48	74
1954-----	58	193
1955-----	85	278
1956-----	74	322
1957-----	56	407
1958-----	44	333
1959-----	74	567
1960-----	67	419
1961-----	64	457
1962-----	76	486
1963-----	89	467
1964-----	99	502
1965-----	108	483
1966-----	122	492
1967-----	118	467
1968-----	158	708
1969-----	158	460
1970-----	153	539
1971-----	132	685
1972-----	151	579
1973-----	126	469
1974-----	87	373

^{1/} Data for 1950-65 estimated from imports of birch and lauan plywood.

Source: Compiled from official statistics of the U.S. Department of Commerce, except as noted.

Table 7.--Lauan door skins: U.S. imports for consumption, by principal sources, 1966-74

Source	1966	1967	1968	1969	1970	1971	1972	1973	1974
Quantity (million square feet)									
Taiwan-----	160	196	293	192	316	476	536	415	309
Japan-----	294	228	365	236	154	129	21	2	<u>1</u> /
Republic of Korea-----	12	19	16	8	56	54	18	29	59
Philippines-----	6	2	9	5	4	9	2	22	5
Nansei Islands-----	19	22	24	19	10	16	1	-	-
Malaysia-----	1	<u>1</u> /	1	<u>1</u> /	<u>1</u> /	1	<u>1</u> /	<u>1</u> /	<u>1</u> /
All other-----	<u>1</u> /	-	<u>1</u> /	<u>1</u> /	<u>1</u> /	<u>1</u> /	<u>1</u> /	1	-
Total-----	492	467	708	460	539	685	579	469	373
Value (1,000 dollars)									
Taiwan-----	5,302	6,915	10,806	6,842	12,397	18,295	19,515	24,005	20,384
Japan-----	11,516	9,763	16,305	10,145	7,255	6,082	970	170	86
Republic of Korea-----	381	727	716	373	2,196	2,260	813	1,552	3,677
Philippines-----	360	103	435	256	177	365	107	1,298	335
Nansei Islands-----	657	785	910	743	354	581	30	-	-
Malaysia-----	18	11	23	3	<u>2</u> /	29	18	-	34
All other-----	<u>2</u> /	-	9	2	3	5	18	52	-
Total-----	18,247	18,303	29,205	18,363	22,383	27,619	21,472	27,077	24,515
Unit value (per 1,000 square feet) <u>3</u> /									
Taiwan-----	\$33.13	\$35.30	\$36.93	\$35.65	\$39.23	\$38.43	\$36.40	\$57.78	\$65.92
Japan-----	39.13	42.90	44.61	42.96	47.26	47.00	47.12	80.98	172.53
Republic of Korea-----	31.08	38.18	43.50	46.23	39.22	42.09	44.79	67.50	62.70
Philippines-----	57.64	47.74	50.02	52.59	43.21	40.35	50.44	56.30	74.02
Nansei Islands-----	34.74	36.10	37.29	38.55	36.18	37.02	33.87	-	-
Malaysia-----	28.73	28.17	39.61	36.19	61.38	41.71	49.46	-	92.17
All other-----	40.51	-	35.94	54.31	29.71	33.72	45.13	52.00	-
Average-----	37.09	39.22	41.22	39.89	41.49	40.33	37.10	57.73	65.68

1/ Less than 500,000 square feet.2/ Less than \$500.3/ Calculated from the unrounded figures.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 8.--Lauan door skins: U.S. imports for consumption, by principal sources and by months, January-June 1975

Source	January	February	March	April	May ^{1/}	June	January-June
Quantity (million square feet)							
Taiwan-----	11 :	12 :	16 :	26 :	52 :	41 :	159
Japan-----	- :	<u>2/</u> :	<u>2/</u> :	- :	- :	- :	<u>2/</u>
Republic of Korea-----	1 :	1 :	5 :	1 :	5 :	- :	12
Philippines-----	<u>2/</u> :	- :	- :	<u>2/</u> :	- :	- :	<u>2/</u>
Nansei Islands-----	- :	- :	- :	- :	- :	- :	-
Malaysia-----	- :	- :	- :	- :	- :	- :	-
All other-----	- :	- :	<u>2/</u> :	- :	- :	- :	<u>2/</u>
Total-----	12 :	13 :	21 :	27 :	57 :	41 :	172
Value (1,000 dollars)							
Taiwan-----	412 :	429 :	698 :	1,248 :	2,571 :	2,097 :	7,455
Japan-----	- :	5 :	36 :	- :	- :	- :	41
Republic of Korea-----	29 :	27 :	242 :	44 :	316 :	- :	659
Philippines-----	3 :	- :	- :	2 :	- :	- :	5
Nansei Islands-----	- :	- :	- :	- :	- :	- :	-
Malaysia-----	- :	- :	- :	- :	- :	- :	-
All other-----	- :	- :	72 :	- :	- :	- :	72
Total-----	445 :	462 :	1,047 :	1,294 :	2,887 :	2,097 :	8,232
Unit value (per 1,000 square feet) ^{3/}							
Taiwan-----	\$36.17 :	\$34.45 :	\$42.77 :	\$47.35 :	\$49.74 :	\$50.86 :	\$46.76
Japan-----	- :	374.07 :	111.49 :	- :	- :	- :	122.53
Republic of Korea-----	40.40 :	39.83 :	51.99 :	55.00 :	60.81 :	- :	54.61
Philippines-----	44.81 :	- :	- :	55.64 :	- :	- :	48.61
Nansei Islands-----	- :	- :	- :	- :	- :	- :	-
Malaysia-----	- :	- :	- :	- :	- :	- :	-
All other-----	- :	- :	776.46 :	- :	- :	- :	776.46
Average-----	36.48 :	35.09 :	49.00 :	47.59 :	50.75 :	50.86 :	46.86

^{1/} All data shown for May are estimated.

^{2/} Less than 500,000 square feet.

^{3/} Calculated from the unrounded figures.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 9.--Lauan door skins: U.S. imports for consumption, by months, January 1973-June 1975

Month	Quantity			Value			Unit value		
	1973	1974	1975	1973	1974	1975	1973	1974	1975
	Million sq. ft.	Million sq. ft.	Million sq. ft.	1,000 dollars	1,000 dollars	1,000 dollars	Per 1,000 sq. ft.	Per 1,000 sq. ft.	Per 1,000 sq. ft.
January-----	53	38	12	1,907	2,548	445	\$35.98	\$67.05	\$36.48
February-----	58	40	13	1,855	2,239	462	31.98	55.98	35.09
March-----	26	38	21	1,036	3,021	1,047	39.85	79.50	49.00
April-----	16	17	27	896	1,330	1,294	56.00	78.24	47.59
May-----	25	30	<u>1/</u> 57	1,640	2,363	<u>1/</u> 2,887	65.60	78.77	<u>1/</u> 50.75
June-----	41	41	41	2,830	3,018	2,097	69.02	73.61	50.86
July-----	40	63	-	2,249	4,332	-	71.22	68.76	-
August-----	57	36	-	3,923	2,325	-	68.82	64.58	-
September-----	43	28	-	2,811	1,585	-	65.37	56.61	-
October-----	55	15	-	3,715	691	-	67.54	46.07	-
November-----	38	21	-	2,373	776	-	62.45	36.95	-
December-----	17	7	-	1,241	288	-	73.00	41.14	-
Total or average-----	469	373	-	27,077	24,515	-	57.73	65.68	-

1/ Estimated.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 10.--Lauan door skins: U.S. imports for consumption, by customs district of unloading, 1973-74 and January-June 1975

(In thousands of square feet)			
Customs district of unloading	1973	1974	January-June 1975
Charleston, S.C-----	122,121	110,027	48,857
Portland, Oreg-----	60,350	59,672	34,145
Philadelphia, Pa-----	58,157	57,107	28,526
Tampa, Fla-----	38,705	34,099	4,534
Galveston, Tex-----	53,566	31,245	11,420
Los Angeles, Calif-----	22,223	31,775	11,001
Baltimore, Md-----	574	15,143	50
San Francisco, Calif-----	15,657	8,070	4,131
San Diego, Calif-----	22,941	6,785	19,661
New Orleans, La-----	9,343	1,713	5,860
Detroit, Mich-----	11,933	-	-
Milwaukee, Wis-----	10,547	-	-
All other-----	42,909	17,600	3,854
Total-----	469,026	375,236	172,039

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 11.--Birch door skins: U.S. imports for consumption, by principal sources, 1966-74

Source	1966	1967	1968	1969	1970	1971	1972	1973	1974
Quantity (million square feet)									
Japan-----	46	59	82	96	105	80	87	73	55
Canada-----	45	33	40	25	17	30	41	43	29
Finland-----	31	27	35	37	31	22	23	10	3
All other-----	1/	-	-	-	-	-	-	-	1/
Total-----	122	118	158	158	153	132	151	126	87
Value (1,000 dollars)									
Japan-----	4,375	5,165	7,497	8,425	7,800	6,405	8,354	10,755	7,642
Canada-----	4,312	3,210	4,015	2,607	1,740	3,098	4,362	5,931	4,709
Finland-----	1,836	1,595	2,072	2,440	2,124	1,663	2,398	1,458	623
All other-----	32	-	5	4	1	4	-	2	7
Total-----	10,554	9,970	13,589	13,477	11,665	11,170	15,114	18,146	12,981
Unit value (per 1,000 square feet) 2/									
Japan-----	\$95.27	\$87.82	\$91.48	\$87.51	\$74.48	\$80.36	\$96.54	\$147.33	\$139.08
Canada-----	96.31	98.46	99.48	103.09	99.68	103.95	105.37	137.93	159.68
Finland-----	59.48	59.42	58.88	66.62	68.26	74.30	103.15	145.80	221.35
All other-----	124.90	-	56.64	40.97	112.25	79.73	-	-	709.70
Average-----	86.64	84.31	86.23	85.14	76.09	84.66	99.98	144.05	148.76

1/ Less than 500,000 square feet.

2/ Calculated from the unrounded figures.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 12.--Birch door skins: U.S. imports for consumption, by principal sources and by months, January-June 1975

Source	January	February	March	April	May 1/	June	January-June
	Quantity (million square feet)						
Japan-----	9	9	11	3	6	4	41
Canada-----	1	2	3	4	4	3	18
Finland-----	2/	2/	2/	2/	2/	2/	2/
All other-----	-	-	-	-	-	-	-
Total-----	10	11	13	7	11	7	59
	Value (1,000 dollars)						
Japan-----	707	676	1,024	296	787	473	3,964
Canada-----	185	303	427	665	625	463	2,668
Finland-----	4	7	2	5	7	55	80
All other-----	-	-	-	-	-	-	-
Total-----	896	986	1,453	967	1,419	990	6,712
	Unit value (per 1,000 square feet) 3/						
Japan-----	\$80.60	\$75.38	\$96.79	\$107.72	\$124.13	\$130.23	\$96.56
Canada-----	153.01	148.83	149.33	152.82	149.35	151.05	150.68
Finland-----	281.36	174.74	133.47	316.35	328.68	381.57	320.30
All other-----	-	-	-	-	-	-	-
Average-----	89.65	89.27	108.00	135.78	134.56	144.82	113.75

A-67

1/ All data shown for May are estimated.

2/ Less than 500,000 square feet.

3/ Calculated from the unrounded figures.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 13.--Birch door skins: U.S. imports for consumption, by months, January 1973-June 1975

Month	Quantity			Value			Unit value		
	1973	1974	1975	1973	1974	1975	1973	1974	1975
	Million sq. ft.	Million sq. ft.	Million sq. ft.	1,000 dollars	1,000 dollars	1,000 dollars	Per 1,000 sq. ft.	Per 1,000 sq. ft.	Per 1,000 sq. ft.
January-----	14	6	10	1,468	1,036	896	\$103.39	\$159.68	\$89.66
February-----	12	8	11	1,442	1,161	986	117.70	152.25	89.27
March-----	9	11	13	1,179	1,770	1,453	127.64	160.15	108.00
April-----	12	5	7	1,695	820	967	138.62	163.27	135.78
May-----	10	10	1/ 11	1,418	1,671	1/ 1,420	148.56	158.02	1/ 134.56
June-----	11	8	7	1,662	1,227	990	158.36	159.33	144.82
July-----	9	10	-	1,475	1,502	-	161.17	154.51	-
August-----	9	12	-	1,388	1,755	-	161.29	140.60	-
September-----	11	6	-	1,761	883	-	164.42	140.90	-
October-----	16	4	-	2,505	465	-	156.08	119.10	-
November-----	7	3	-	1,094	328	-	156.73	127.58	-
December-----	6	4	-	1,058	362	-	162.39	94.08	-
Total or average-----	126	87		18,146	12,981		144.05	148.76	

1/ Estimated.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 14.--Birch door skins: U.S. imports for consumption from Japan, Canada, and Finland, by customs district of unloading, 1970, 1972-74, and January-June 1975

(In thousands of square feet)					
Customs district of unloading	1970	1972	1973	1974	January - June 1975
Imports from Japan					
New York, N.Y-----	1,975	1,832	419	249	-
Philadelphia, Pa-----	9,628	9,884	7,020	3,094	5,009
Baltimore, Md-----	6,892	750	219	-	-
Wilmington, N.C-----	5,868	1,006	-	-	-
Charleston, S.C-----	4,878	16,595	15,577	15,636	11,179
New Orleans, La-----	15,770	1,276	-	331	1,190
Galveston, Tex-----	38	5,472	3,619	5,619	1,947
Houston, Tex-----	6,352	4,303	5,322	2,332	1,740
Los Angeles, Calif----	10,556	11,543	9,780	9,220	4,458
San Francisco, Calif--	1,962	7,325	3,020	2,170	1,647
Portland, Oreg-----	22,765	19,898	20,861	15,294	13,822
Seattle, Wash-----	4,947	375	110	-	-
Detroit, Mich-----	2,642	4,129	5,136	-	-
All other-----	10,459	2,147	2,111	1,004	57
Total	104,732	86,535	73,194	54,949	41,049
Imports from Canada					
St. Albans, Vt-----	671	11,176	19,778	13,465	1,444
Ogdensburg, N.Y-----	3,186	4,081	4,291	2,337	3,480
Buffalo, N.Y-----	7	3	1,615	-	-
Detroit, Mich-----	13,522	26,078	16,764	13,690	12,783
All other-----	69	59	234	-	-
Total	17,455	41,397	42,682	29,492	17,707
Imports from Finland					
New York, N.Y-----	985	2,034	115	110	156
Baltimore, Md-----	7,654	4,849	2,212	670	59
Norfolk, Va-----	17,970	14,479	6,665	1,619	-
New Orleans, La-----	2,844	642	742	87	4
Houston, Tex-----	1,024	94	-	291	-
All other-----	643	1,146	350	36	30
Total	31,120	23,244	10,084	2,813	249

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 15.--Flush doors: U.S. shipments, by types, 1963, 1967 and 1972

Item	1963	1967	1972
	Quantity (thousands)		
Hollow core:			
Softwood faces-----	1/	2,491	2,722
Hardwood faces, including lauan-----	1/	20,445	26,488
Other faces, including hardboard-----	1/	1/	1/
Total, hollow core-----	27,000	1/	1/
Solid core:			
Hardwood faces, including lauan-----	1/	3,445	4,063
Softwood and other faces, including hardboard---	1/	126	1/
Total, solid core-----	2,901	3,571	1/
Total, all flush doors-----	29,901	1/	1/
	Value (million dollars)		
Hollow core:			
Softwood faces-----	1/	15.0	37.2
Hardwood faces, including lauan-----	1/	111.0	197.1
Other faces, including hardboard-----	1/	8.1	37.3
Total, hollow core-----	146.1	134.1	271.6
Solid core:			
Hardwood faces, including lauan-----	1/	64.8	82.5
Softwood and other faces-----	1/	2.6	15.0
Total, solid core-----	44.8	67.4	97.5
Total, all flush doors-----	190.9	201.5	369.1
1/ Not available.			

Source: U.S. Department of Commerce, Census of Manufactures, 1963, 1967 and 1972.

Table 16.--Wood doors: U.S. imports for consumption, by principal sources, 1970-74

Source	1970	1971	1972	1973	1974
Quantity (number)					
Mexico-----	400,517	503,741	560,250	550,117	442,763
Taiwan-----	254,387	310,364	599,814	664,524	287,293
Japan-----	99,357	101,576	79,078	49,639	1/
Spain-----	50,519	64,371	67,340	30,142	16,475
Canada-----	75,472	92,327	124,716	159,651	99,826
Colombia-----	8,067	6,137	8,127	15,551	13,379
All other-----	21,521	16,541	53,375	54,741	36,317
Total-----	909,840	1,095,057	1,492,700	1,524,365	896,053
Value					
Mexico-----	\$1,894,357	\$2,316,158	\$3,041,638	\$4,076,812	\$4,383,278
Taiwan-----	1,187,532	1,408,932	2,286,983	4,033,214	2,832,603
Japan-----	318,943	239,386	129,426	124,992	1/
Spain-----	340,780	405,684	413,552	227,291	149,129
Canada-----	429,321	619,196	911,123	1,458,913	1,064,365
Colombia-----	209,878	252,213	346,208	517,275	641,213
All other-----	314,296	197,610	409,660	859,962	761,360
Total-----	4,695,107	5,439,179	7,538,590	11,298,459	9,831,948
Unit value (per door)					
Mexico-----	\$4.73	\$4.60	\$5.43	\$7.41	\$9.90
Taiwan-----	4.67	4.54	3.81	6.07	9.86
Japan-----	3.21	2.36	1.64	2.52	1/
Spain-----	6.74	6.30	6.14	7.54	9.05
Canada-----	5.69	6.71	7.31	9.14	10.66
Colombia-----	26.02	41.10	42.60	33.26	47.92
All other-----	14.60	11.95	7.68	15.71	20.96
Total-----	5.16	4.97	5.05	7.41	10.97

1/ Not available.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Table 17.--Wood doors: U.S. imports for consumption, by principal sources and months, January-June 1975

Source	January	February	March	April	May 1/	June	January-June
Quantity (number)							
Mexico-----	40,529	19,483	32,617	21,171	31,278	39,591	184,669
Taiwan-----	40,134	12,810	11,345	28,560	27,690	26,802	147,521
Japan-----	-	-	-	536	-	2	538
Spain-----	-	-	375	663	-	-	1,038
Canada-----	2,129	5,324	2,243	6,397	1,780	6,631	24,504
Colombia-----	1,317	358	622	512	767	622	4,198
All other-----	1,007	1,098	2,720	1,296	644	1,440	8,025
Total-----	85,116	39,073	49,922	59,135	62,159	75,088	370,493
Value							
Mexico-----	\$341,743	\$197,387	\$290,028	\$185,846	\$287,958	\$344,643	\$1,647,605
Taiwan-----	197,681	96,917	83,556	145,247	150,480	198,671	872,552
Japan-----	-	-	-	28,160	-	304	28,464
Spain-----	-	-	3,401	7,041	-	-	10,442
Canada-----	34,096	56,536	19,907	56,249	14,389	60,704	231,881
Colombia-----	69,476	21,720	33,072	29,583	43,151	34,204	231,206
All other-----	27,846	40,485	67,480	40,801	14,554	23,696	214,502
Total-----	660,482	413,045	497,444	492,927	510,532	662,222	3,236,652
Unit value (per door)							
Mexico-----	\$8.43	\$10.13	\$8.89	\$8.78	\$9.21	\$8.71	\$8.92
Taiwan-----	4.90	7.56	7.37	5.09	5.43	7.41	5.91
Japan-----	-	-	-	52.54	-	152.00	52.91
Spain-----	-	-	9.07	10.62	-	-	10.06
Canada-----	11.32	10.62	8.88	8.79	8.08	9.15	9.46
Colombia-----	52.75	60.67	53.17	57.78	56.26	54.99	55.08
All other-----	27.29	36.87	24.81	31.48	22.60	16.46	26.73
Average-----	7.76	10.57	9.96	8.34	8.21	8.82	8.74

1/ All data shown for May are estimated.

Table 18.--Wood doors: U.S. imports for consumption, by months, 1973, 1974, and January-June 1975

Month	Quantity			Value			Unit value ^{1/}		
	1973	1974	1975	1973	1974	1975	1973	1974	1975
	<u>Thou-</u> <u>sands</u>	<u>Thou-</u> <u>sands</u>	<u>Thou-</u> <u>sands</u>	<u>1,000</u> <u>dollars</u>	<u>1,000</u> <u>dollars</u>	<u>1,000</u> <u>dollars</u>	<u>Per</u> <u>door</u>	<u>Per</u> <u>door</u>	<u>Per</u> <u>door</u>
January-----	123	83	85	772	797	660	\$6.27	\$9.60	\$7.76
February-----	115	79	39	591	884	413	5.15	11.15	10.57
March-----	127	100	50	758	1,024	497	5.96	10.24	9.96
April-----	163	68	59	979	788	493	6.03	11.62	8.34
May-----	136	79	62	938	912	511	6.89	11.73	8.21
June-----	121	81	75	1,009	867	662	8.31	10.74	8.82
July-----	152	58	-	1,184	750	-	7.77	13.02	-
August-----	131	74	-	1,146	1,006	-	8.78	13.65	-
September-----	106	88	-	991	898	-	9.31	10.21	-
October-----	127	67	-	1,073	779	-	8.47	11.56	-
November-----	142	61	-	1,058	588	-	7.45	9.66	-
December-----	81	60	-	799	537	-	9.84	8.98	-
Total or average-----	1,524	896	-	11,298	9,832	-	7.41	10.97	-

^{1/} Calculated from the unrounded figures.

Source: Compiled from official statistics of the U.S. Department of Commerce.

Note.--Because of rounding, figures may not add to the totals shown.

Table 19.--Wood doors: U.S. imports for consumption by customs district of unloading,
1973, 1974, and January-June 1975

(In thousands of square feet)

Customs district of unloading	1973	1974	January-June 1975
El Paso, Tex-----	542,237	436,330	181,095
San Juan, P.R-----	225,415	131,300	28,727
Los Angeles, Calif-----	157,849	84,394	40,601
Seattle, Wash-----	118,290	53,109	13,687
New York City, N.Y-----	115,906	28,956	36,926
Baltimore, Md-----	98,237	37,516	17,960
Duluth, Minn-----	53,836	46,989	12,448
San Francisco, Calif-----	41,181	21,143	2,331
Boston, Mass-----	16,444	5,608	3,152
Honolulu, Hawaii-----	10,876	10,036	965
All other-----	144,094	40,672	23,599
Total-----	1,524,365	896,053	370,493

Source: Compiled from official statistics of the U.S. Department of Commerce.

A-75 through A-77

*

*

*

*

*

*

*

Table 23.--Door skins: Estimated U.S. production, by types, 1970-74 and, by quarters, 1974 and January-June 1975

(In thousands of square feet)

Type	1970	1971	1972	1973	Total	1974				1975	
						January- March	April- June	July- September	October- December	January- March	April- June
Birch plywood-----	19,559	27,710	36,857	38,829	25,868	10,024	8,042	6,223	1,579	886	1,362
Other plywood-----	10,237	17,019	21,775	22,636	19,838	5,817	6,097	5,029	2,895	3,984	4,776
Hardboard-----	*	*	*	*	*	*	*	*	*	*	*
Total-----	*	*	*	*	*	*	*	*	*	*	*

Source: Compiled from information supplied by domestic producers.

Table 24--Door skins: Estimated U.S. end-of-period inventories, by types, 1969-74 and, by quarters, 1974

(In thousands of square feet)										
Type	1969 ^{1/}	1970	1971	1972	1973	1974				
						Total	January- March	April- June	July- September	October- December
Birch door skins-----	3,121	4,581	2,043	1,302	1,517	1,428	2,104	1,356	1,685	1,428
Plywood door skins other than										
birch-----	760	451	726	759	852	652	835	960	926	652
Total door skins-----	3,881	5,032	2,769	2,061	2,369	2,080	2,939	2,316	2,611	2,080

^{1/} Official statistics.

Source: Compiled from information supplied by domestic producers.

Note.--There were no end-of-period inventories of hardboard door skins in 1969-74.

Table 25.--Average prices paid for door skins by U.S. producers of flush doors, by types, 1970, 1971, and, by quarters, 1972-74 and January-June 1975

(Per 1,000 square feet)						
Period	Domestically produced			Imported		
	Oak <u>1/</u>	Birch <u>2/</u>	Hardboard	Lauan <u>2/</u>	Birch <u>3/</u>	Hardboard
1970-----	\$159	\$119	\$43	\$58	\$93	\$40
1971-----	125	115	47	64	99	40
1972:						
Jan.-Mar-----	186	117	46	61	107	43
Apr.-June-----	186	120	47	61	110	45
July-Sept-----	189	122	48	60	118	47
Oct.-Dec-----	187	125	49	59	123	47
1973:						
Jan.-Mar-----	190	145	50	62	140	47
Apr.-June-----	208	169	55	78	159	54
July-Sept-----	213	177	57	95	188	55
Oct. Dec-----	228	175	64	96	179	62
1974:						
Jan.-Mar-----	244	177	68	103	175	65
Apr.-June-----	253	181	70	105	171	68
July-Sept-----	271	173	79	97	163	74
Oct.-Dec-----	263	175	71	77	135	73
1975:						
Jan.-Mar-----	261	165	76	77	125	64
Apr.-June-----	270	165	68	79	150	62

1/ Premium grade.

2/ Good (AB) grade.

3/ Weighted average of premium (AA), good (AB), and composite (50-50 AA and AB) grades.

Source: Compiled from data supplied by domestic producers of flush doors.

Note.--The expression "average price" in this table is used to mean the average lowest price (unweighted) paid by domestic flush-door producers for the product in question.

Table 26.--Indexes of U.S. wholesale prices for hardwood plywood and other selected commodities, by quarters, 1968-74 and January-June 1975

(1967=100)					
Period	All commodities	Lumber and wood products	Hardwood plywood	Hardboard and particleboard	
1968:					
Jan.-Mar----	101.6	105.7	99.0	99.1	
Apr.-June----	102.3	110.7	101.0	99.0	
July-Sept----	102.7	114.6	100.8	98.6	
Oct.-Dec----	103.2	125.2	101.0	99.6	
1969:					
Jan.-Mar----	104.8	136.5	102.5	107.3	
Apr.-June----	106.1	130.0	104.0	109.4	
July-Sept----	106.9	117.8	104.6	98.5	
Oct.-Dec----	108.0	116.7	104.8	96.4	
1970:					
Jan.-Mar----	109.6	114.3	104.5	94.4	
Apr.-June----	110.1	114.2	104.6	94.0	
July-Sept----	110.8	113.9	101.6	93.6	
Oct.-Dec----	111.0	112.0	100.7	92.0	
1971:					
Jan.-Mar----	112.5	117.7	101.3	91.8	
Apr.-June----	113.8	125.2	101.9	93.2	
July-Sept----	114.7	133.2	99.9	93.8	
Oct.-Dec----	114.4	131.9	99.7	94.2	
1972:					
Jan.-Mar----	117.0	137.4	101.9	94.7	
Apr.-June----	118.2	142.7	102.6	96.4	
July-Sept----	119.9	147.6	105.5	97.2	
Oct.-Dec----	121.2	149.5	107.0	97.3	
1973:					
Jan.-Mar----	127.1	161.7	105.7	98.3	
Apr.-June----	133.2	184.0	111.9	102.0	
July-Sept----	138.7	179.5	114.0	106.9	
Oct.-Dec----	139.9	183.7	119.3	115.7	
1974:					
Jan.-Mar----	152.5	186.4	124.8	119.2	
Apr.-June----	154.5	196.8	130.5	118.4	
July-Sept----	165.4	184.2	133.9	115.9	
Oct.-Dec----	171.2	166.9	131.6	107.2	
1975:					
Jan.-Mar----	171.8	169.6	117.3	110.4	
Apr.-June----	173.7	181.0	119.1	112.9	

Source: Compiled from official statistics of the U.S. Bureau of Labor Statistics

Table 27.--Index of Japanese export prices for birch plywood, by months,
1970-74 and January-June 1975

(1970=100)						
Month	1970	1971	1972	1973	1974	1975
January-----	93.0	103.3	109.3	135.2	169.4	121.0
February-----	95.7	107.3	111.0	140.2	181.7	139.1
March-----	102.7	115.7	112.0	165.8	175.2	143.3
April-----	106.1	116.7	114.2	170.3	163.1	146.5
May-----	107.4	116.1	116.6	169.2	158.9	146.3
June-----	107.5	116.5	117.2	162.1	156.2	143.4
July-----	106.3	115.8	117.5	152.8	155.1	-
August-----	103.4	113.8	119.6	151.3	157.1	-
September-----	97.1	106.5	120.8	153.5	139.3	-
October-----	90.5	104.1	123.8	152.2	101.5	-
November-----	94.3	105.0	130.7	155.2	93.9	-
December-----	96.0	104.5	132.5	161.9	96.2	-

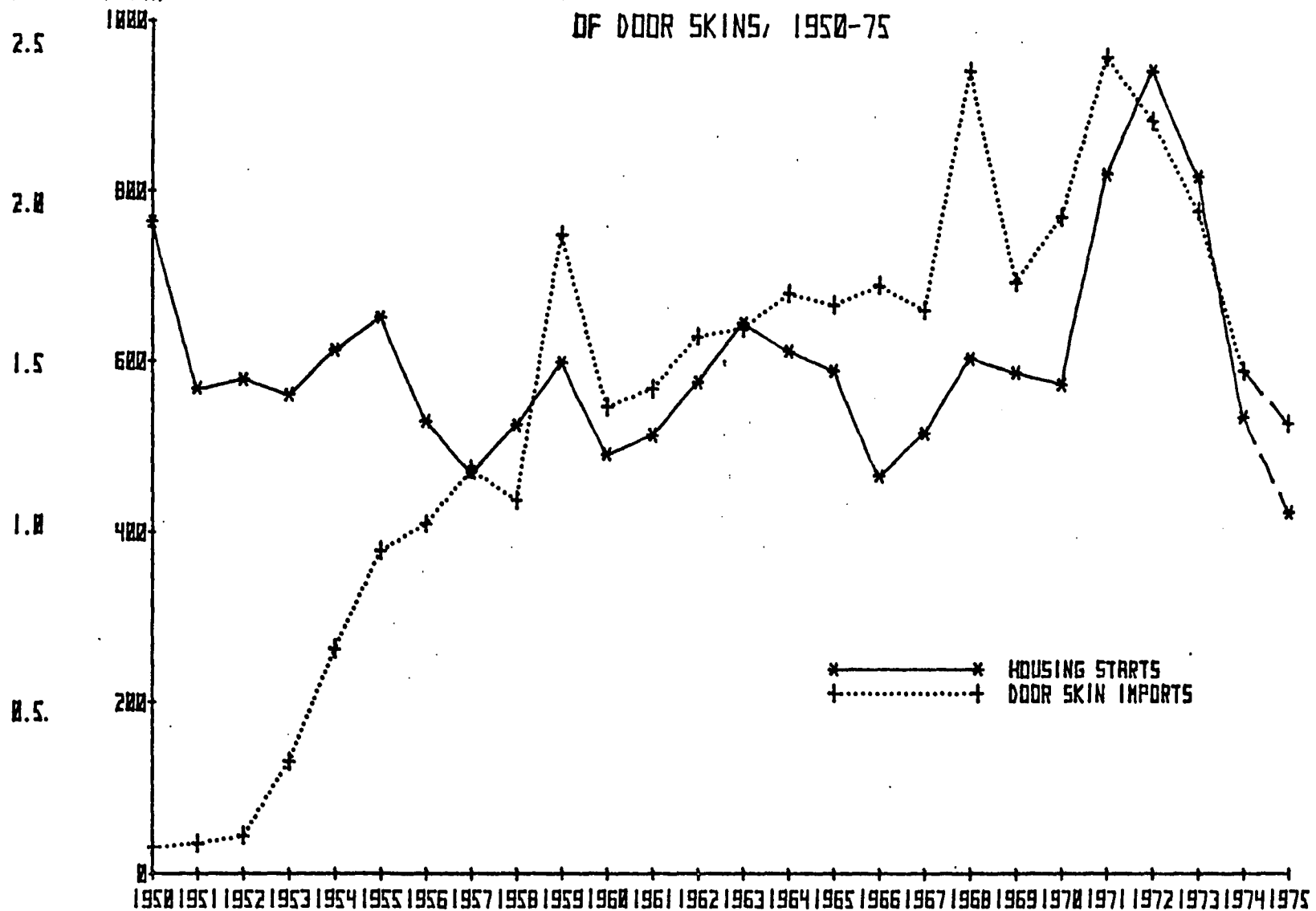
Source: The Bank of Japan, Statistics Department, Price Indexes Annual,
and Export and Import Price-Indexes Monthly, various issues.

APPENDIX B
FIGURES

HOUSING
STARTS
(MILLIONS)

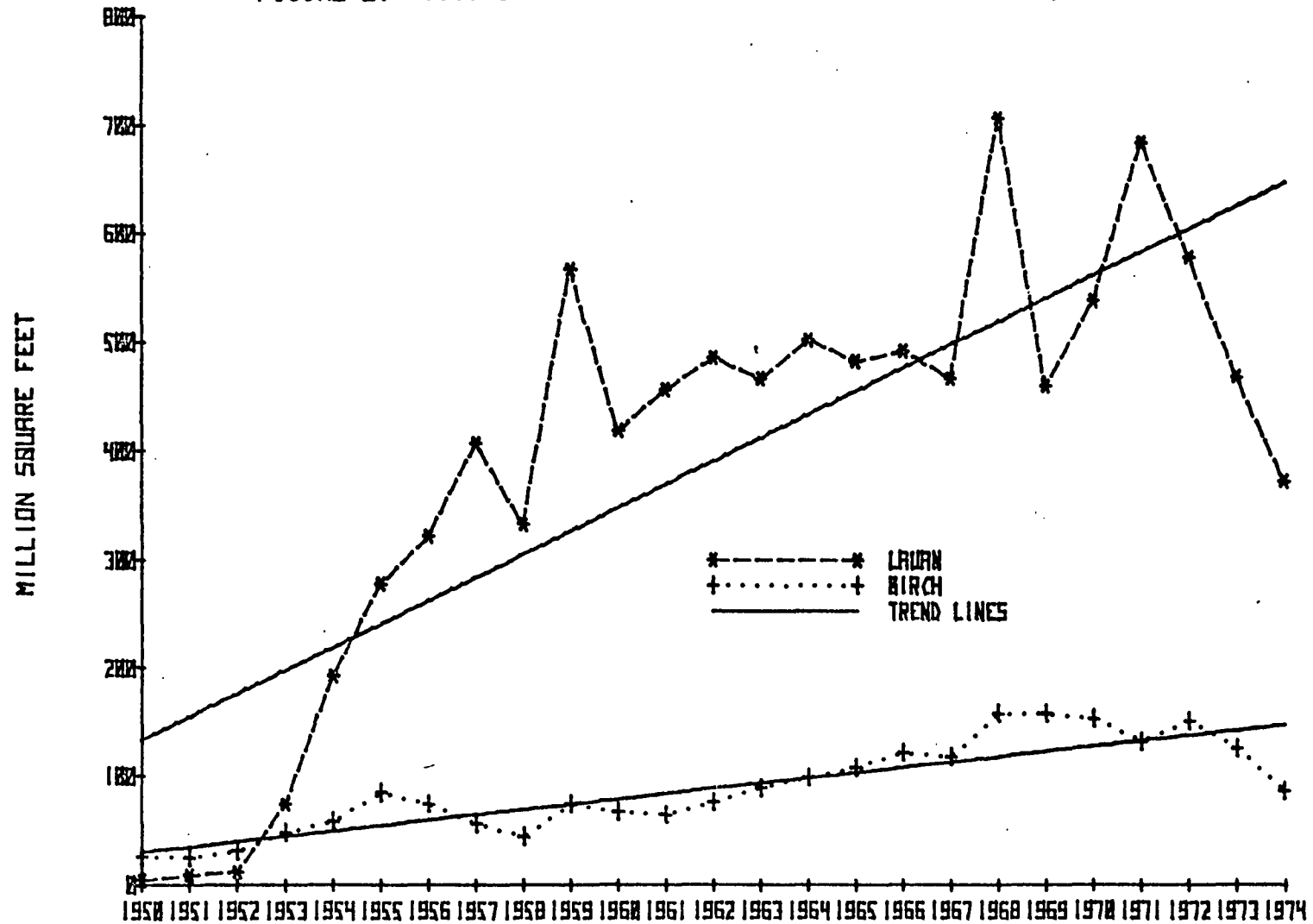
IMPORTS
(MILLION
SQ. FT.)

FIGURE 1.--PRIVATE HOUSING STARTS AND U.S. IMPORTS
OF DOOR SKINS, 1950-75



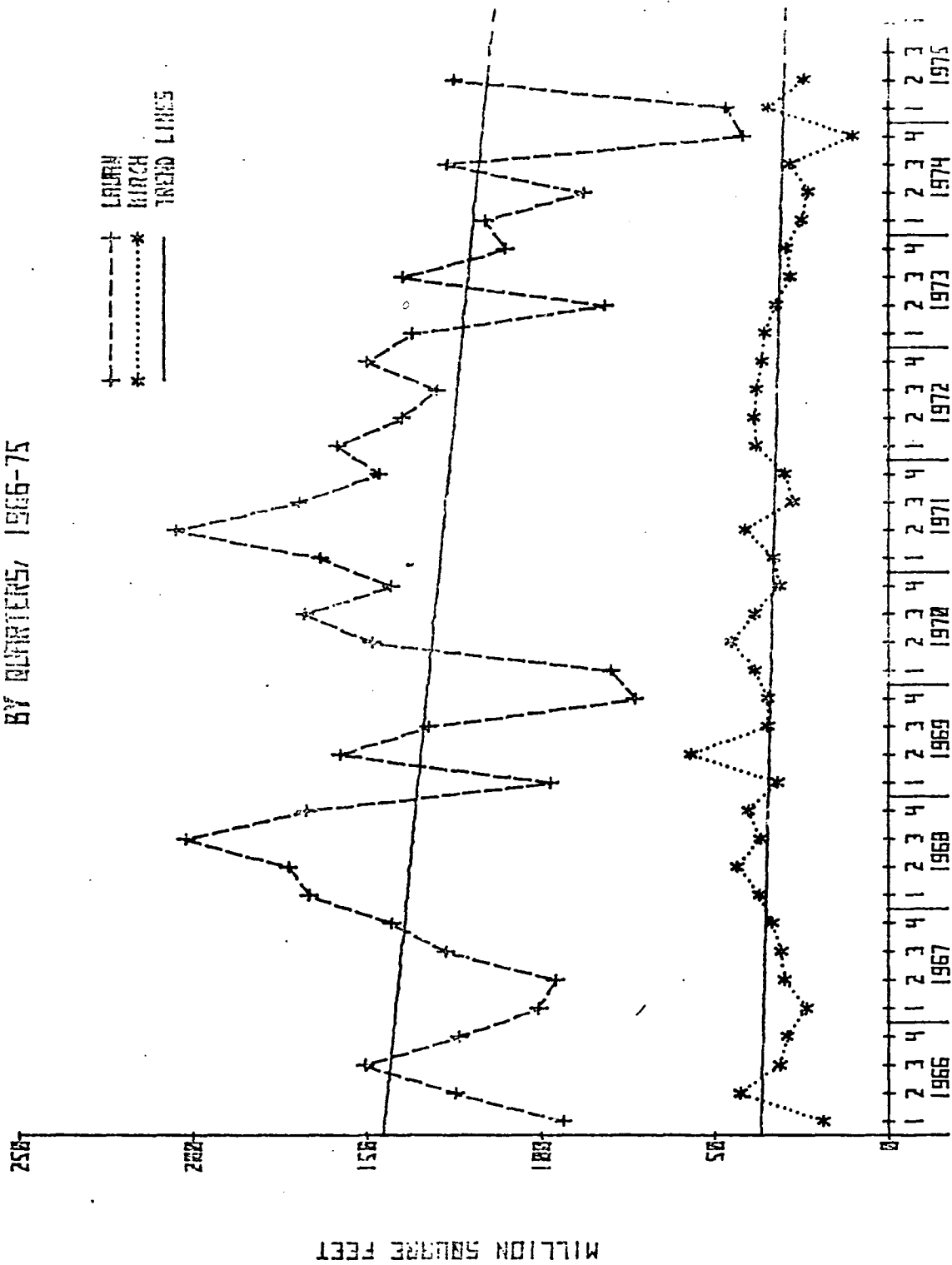
SOURCE: HOUSING STARTS FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE; IMPORTS FOR 1970-75 FROM RESPONSES TO THE COMMISSION'S QUESTIONNAIRES AND FROM OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE; IMPORTS FOR 1950-69 ESTIMATED FROM COMMERCE DEPARTMENT DATA.

FIGURE 2.--U.S. IMPORTS OF BIRCH AND LAUAN DOOR SKINS, 1950-74



SOURCE: OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE, EXCEPT DATA FOR 1950-65, ESTIMATED BY THE U.S. INTERNATIONAL TRADE COMMISSION FROM IMPORTS OF BIRCH AND LAUAN PLYWOOD.

FIGURE 3.--U.S. IMPORTS OF BIRCH AND LAUAN DOOR SKINS,
BY QUARTERS, 1966-75



SOURCE: OFFICIAL STATISTICS OF THE U.S. DEPARTMENT OF COMMERCE.

FIGURE 4.--AVERAGE UNIT VALUE OF U.S. IMPORTS OF BIRCH DOGR SKINS,
BY QUARTERS, 1970-74 AND JANUARY-JUNE 1975

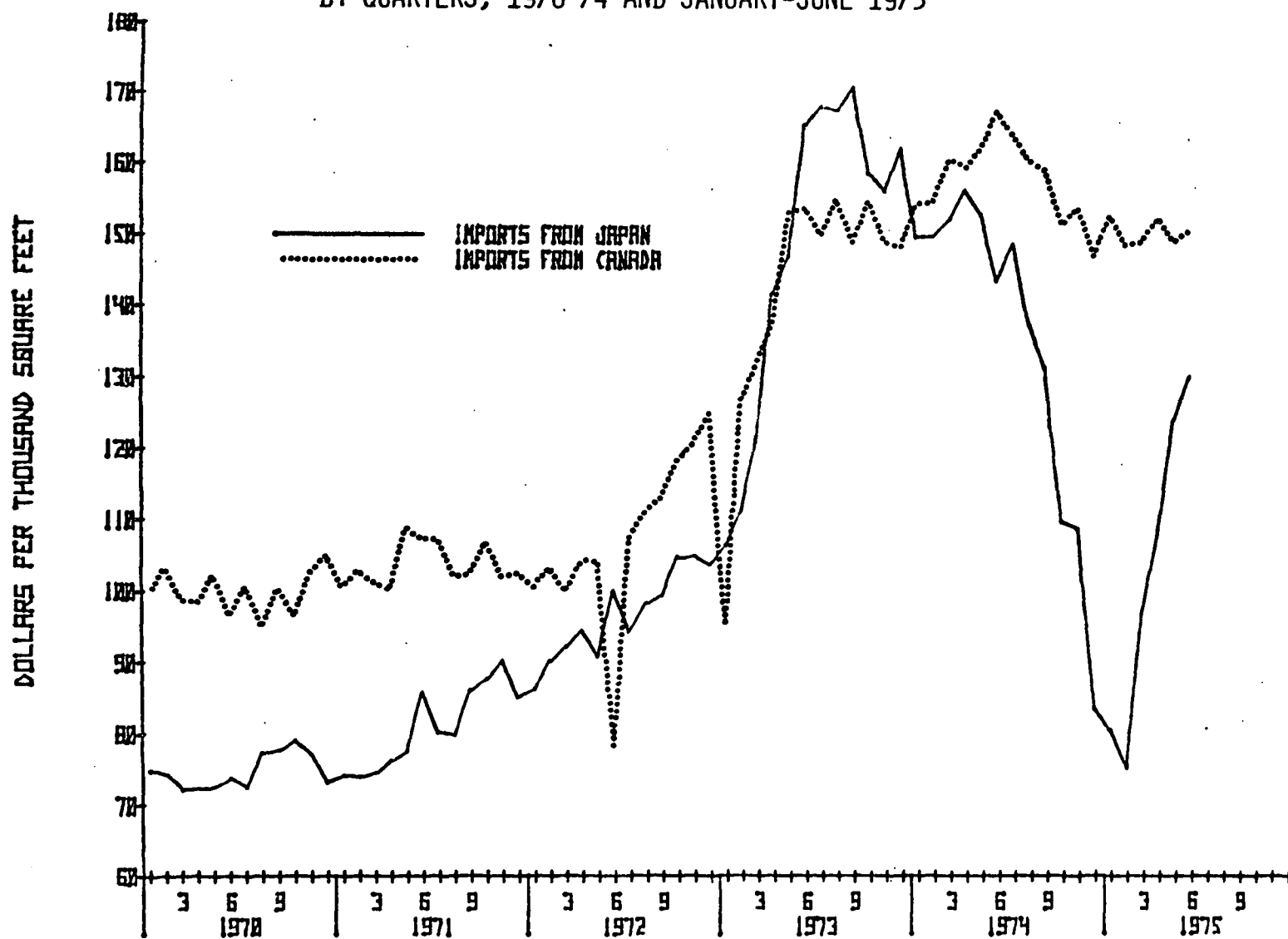
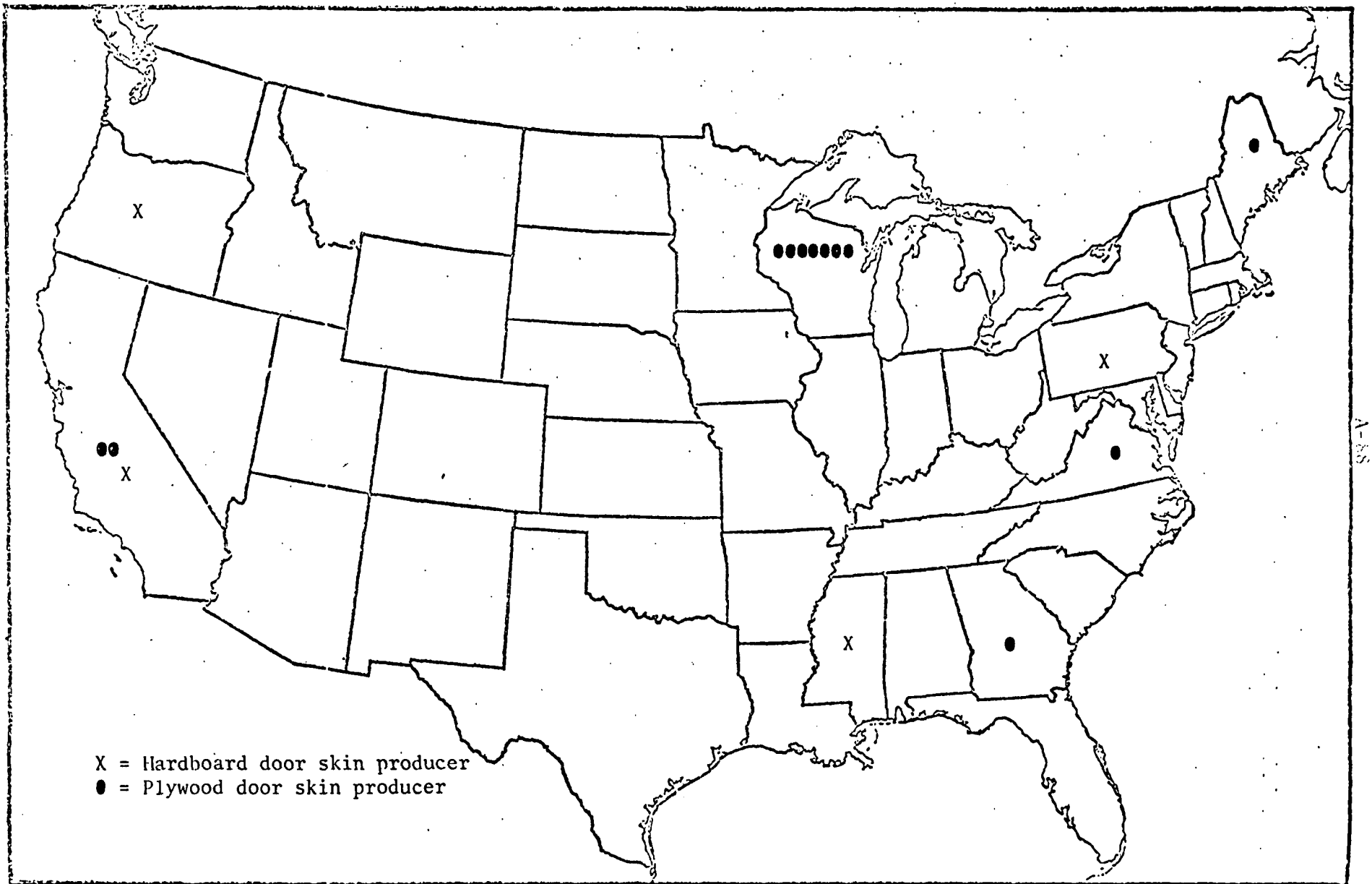


Figure 5.--All door skins: Plant locations of U.S. manufacturers, 1975

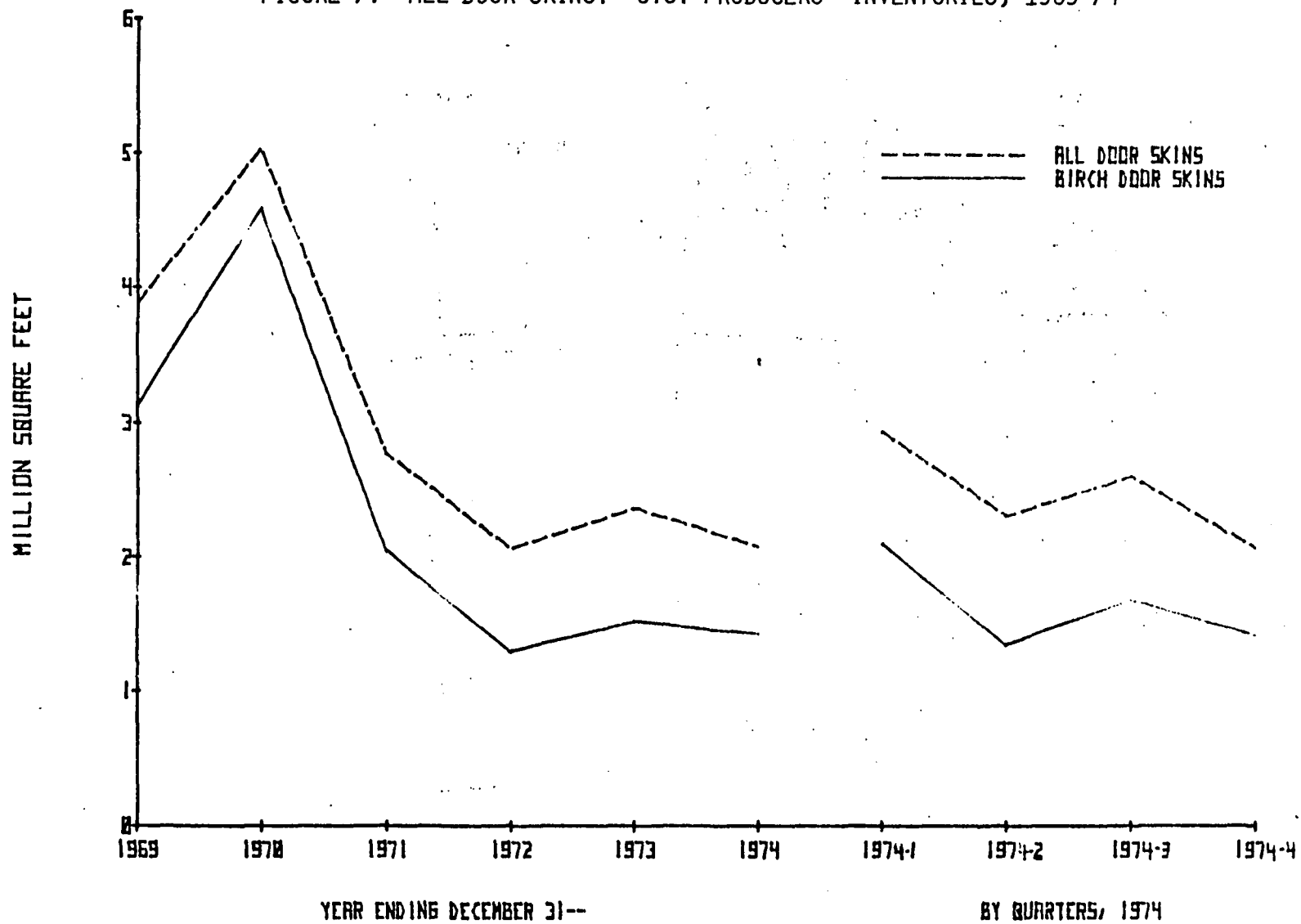


Source: Compiled from information supplied by domestic producers.

A map of the United States showing the distribution of the plant species. Black dots indicate collection sites. The distribution is concentrated in the Pacific Northwest, California, the Great Lakes region, the Northeast, and the Southeast.

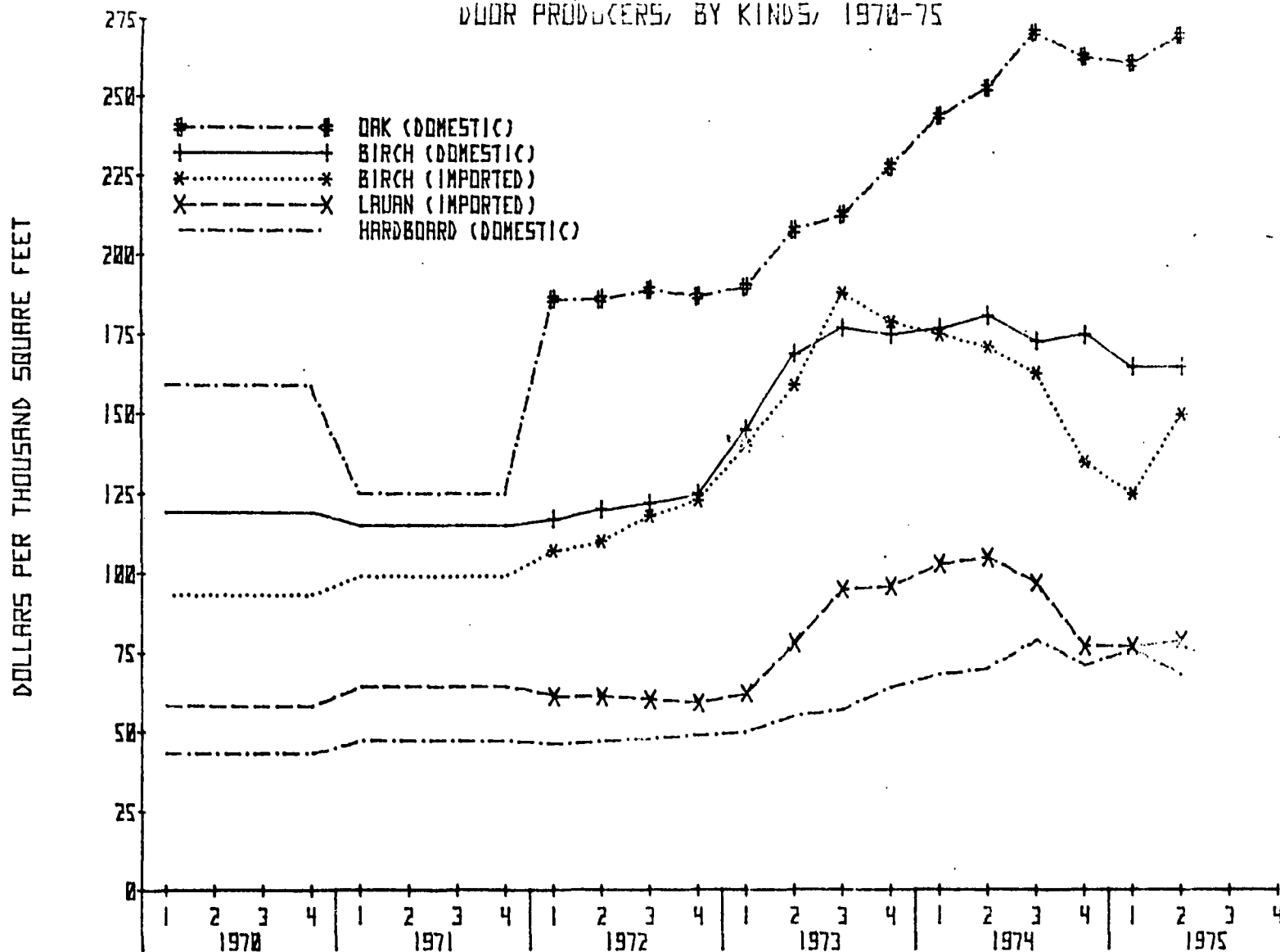
-A-89

FIGURE 7.--ALL DOOR SKINS: U.S. PRODUCERS' INVENTORIES, 1969-74



SOURCE: RESPONSES TO U.S. INTERNATIONAL TRADE COMMISSION QUESTIONNAIRES.

FIGURE 8.--AVERAGE PRICES PAID FOR DOOR SKINS BY U.S. FLUSH-
DOOR PRODUCERS, BY KINDS, 1970-75

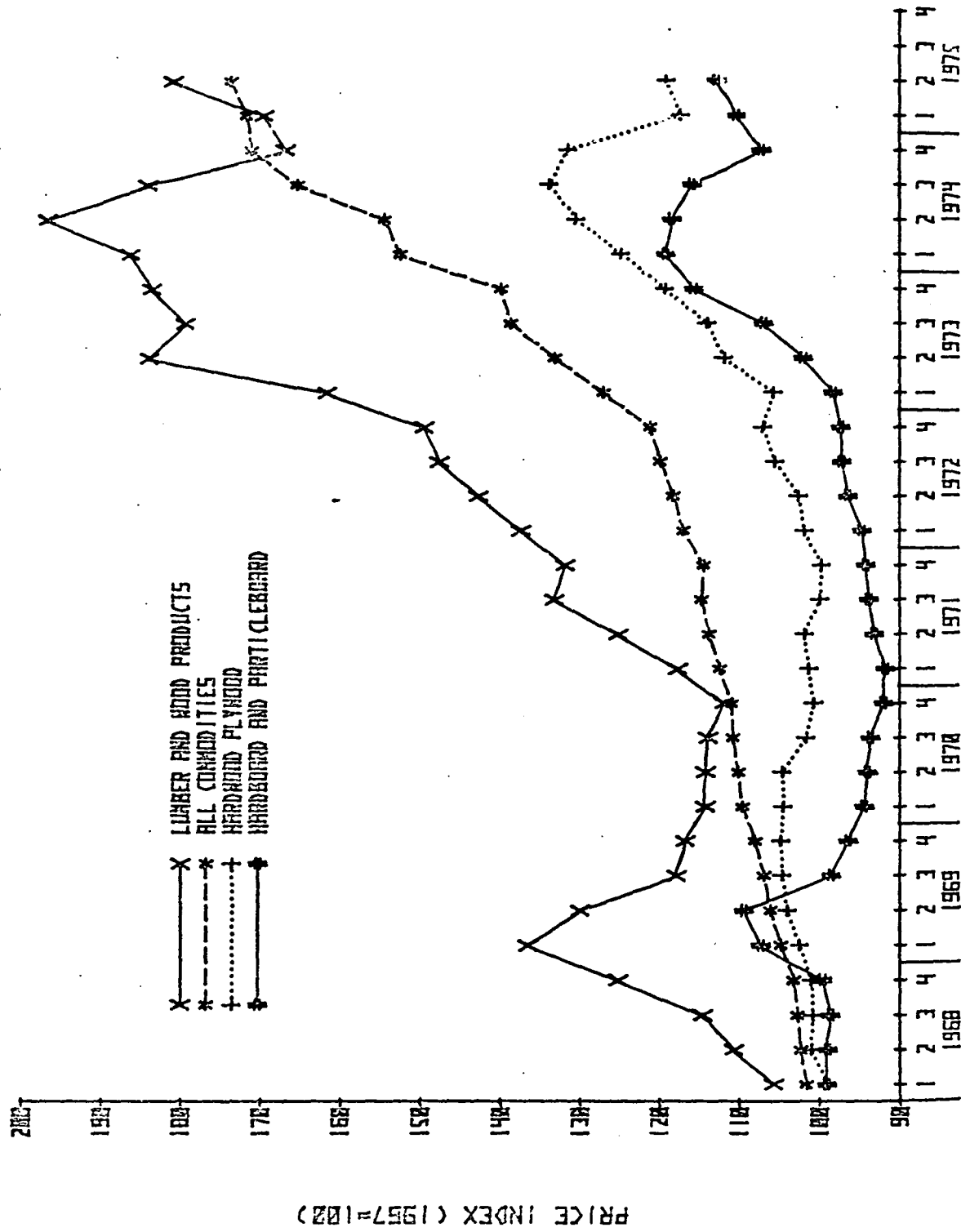


16-91

SOURCE: RESPONSES TO U.S. INTERNATIONAL TRADE COMMISSION QUESTIONNAIRES.

Note.--The expression "average price" in this figure is used to mean the average lowest price (unweighted) paid by domestic flush-door producers for the product in question.

FIGURE 9--U.S. WHOLESALE PRICE INDEXES, BY QUARTERS, 1968-75



A-93 through A-98

★ ★ ★ ★ ★ ★ ★

Library Cataloging Data

U.S. International Trade Commission.

Birch plywood door skins. Report
to the President on investigation no.
TA-201-1 under section 201 of the Trade
act of 1974. Washington, 1975.

31, A-98 p. 27 cm. (USITC Pub. 743)

1. Doors. 2. Plywood. 3. Hardwood.

I. Title.

