



Particleboard in the Pacific Rim and Europe 2009 – 2013

Market opportunities, strategies and prospects for trade and investment.

The forthcoming upturn will present unparalleled opportunities for market expansion, investment, and exports:

- Where will the opportunities be?
- Will the industry consolidate?
- Will it be caught short?
- Will it be more competitive?
- What will happen to prices and costs?
- What new products are on the horizon?
- What are the prospects for resource supply, furniture manufacturing and housing?



EXTRACT TO INDICATE THE GENERAL NATURE OF THE REPORT

FORESTRY

Contents

EXECUTIVE SUMMARY	I
1. INTRODUCTION	1
1.1 Objectives	3
1.2 Methodology.....	3
1.3 Organisation of the report	4
2. NORTH AMERICA	5
2.1 Economic forecasts, North America.....	7
2.1.1 United States	7
2.1.2 Canada	8
2.2 Building industry forecast, North America.....	9
2.2.1 United States	9
2.2.2 Canada	10
2.3 Furniture industry forecasts, North America	11
2.3.1 Furniture production.....	11
2.3.2 United States	11
2.3.3 Canada	11
2.3.4 Furniture Exports and Imports	12
2.3.5 Impact of China on North American furniture production	13
2.4 The forest industry and resource base, North America	14
2.4.1 United States	14
2.4.2 Canada	15
2.5 Particleboard Industry Overview and Forecasts, North America.....	16
2.5.1 Production capacity	16
2.5.2 Production forecasts	17
2.5.3 Capacity Utilisation	19
2.5.4 Particleboard Production Facilities, North America	20
2.5.5 United States	20
2.5.6 Particleboard production costs, North America	26
2.6 Market Forecasts, North America	27
2.6.1 Consumption forecasts, North America.....	27
2.6.2 Trade forecasts, North America.....	28
2.6.3 Particleboard Price Forecasts, North America	30
2.6.4 End-use markets for particleboard, North America	31
2.6.5 Potential new applications for particleboard, North America.....	32
2.6.6 Quality assessment of particleboard, North America	33
2.6.7 Distribution channels for particleboard, North America	34
2.6.8 Promotion of particleboard, North America	35
3. EUROPE.....	37

3.1	Economic Overview, Europe.....	39
3.2	Building industry forecasts, Europe	39
3.3	Furniture industry, Europe	41
3.4	The Forest Industry and Resource Base, Europe	42
3.4.1	Finland	42
3.4.2	Austria.....	43
3.4.3	Sweden.....	43
3.4.4	Germany	44
3.4.5	Russia.....	45
3.5	Particleboard industry overview, Europe	46
3.5.1	Production capacity	46
3.5.2	Production forecasts	48
3.5.3	Capacity utilisation.....	51
3.5.4	Particleboard production facilities, Europe	52
3.5.5	Particleboard production costs, Europe.....	60
3.6	Market forecasts, Europe.....	61
3.6.1	Consumption forecasts, Europe	61
3.6.2	Trade forecasts, Europe	64
3.6.3	Price forecasts, Particleboard, Europe	66
3.7	End-use markets for Particleboard, Europe.....	67
3.8	Potential new applications for particleboard, Europe.....	68
3.9	Quality assessment of particleboard, Europe	69
3.10	Distribution channels for Particleboard, Europe	69
3.11	Promotion of Particleboard, Europe.....	70
4.	NORTH ASIA.....	71
4.1	Economic overview, North Asia	73
4.1.1	China.....	73
4.1.2	Japan	74
4.1.3	South Korea.....	75
4.2	Building industry forecast.....	76
4.2.1	China.....	76
4.2.2	Japan	77
4.2.3	South Korea.....	78
4.3	Furniture industry, North Asia	79
4.3.1	China.....	80
4.3.2	Japan	81
4.3.3	South Korea.....	82
4.4	Resource base and forest industry overview.....	83
4.4.1	China.....	84
4.4.2	Japan	85
4.4.3	South Korea.....	86

4.5	Particleboard industry overview, North Asia	87
4.5.1	Production capacity	87
4.5.2	Production forecasts	89
4.5.3	Capacity utilisation	90
4.5.4	Particleboard Production facilities, North Asia.....	91
4.5.5	Particleboard production costs, North Asia	100
4.6	Market Forecasts, North Asia	101
4.6.1	Consumption forecasts, North Asia	101
4.6.2	Trade forecasts, North Asia	104
4.6.3	Price forecasts, North Asia	109
4.7	End-use markets for Particleboard, North Asia	111
4.8	Potential new applications for Particleboard, North Asia.....	113
4.8.1	China.....	113
4.8.2	Japan	113
4.8.3	South Korea.....	115
4.9	Quality of Particleboard, North Asia.....	115
4.9.1	China.....	115
4.9.2	Japan	115
4.9.3	South Korea.....	116
4.10	Distribution channels, North Asia.....	117
4.10.1	China.....	117
4.10.2	Japan	117
4.10.3	South Korea.....	120
4.11	Promotion of Particleboard, North Asia	121
4.11.1	China.....	121
4.11.2	Japan	121
4.11.3	South Korea.....	121
5.	SOUTH ASIA.....	123
5.1	Economic overview	125
5.1.1	India	125
5.1.2	Indonesia	126
5.1.3	Malaysia.....	127
5.1.4	Thailand	128
5.1.5	Vietnam.....	128
5.2	Building industry forecasts, South East Asia	129
5.2.1	India	129
5.2.2	Indonesia	132
5.2.3	Malaysia.....	133
5.2.4	Thailand	133
5.2.5	Vietnam.....	134
5.3	Furniture industry, South Asia.....	134
5.3.1	India	134
5.3.2	Indonesia	137

5.3.3	Malaysia.....	138
5.3.4	Thailand.....	139
5.3.5	Vietnam.....	139
5.4	The forest industry and resource base	141
5.4.1	India	141
5.4.2	Indonesia	142
5.4.3	Malaysia.....	143
5.4.4	Thailand	144
5.4.5	Vietnam.....	145
5.5	Particleboard industry overview, South Asia	146
5.5.1	Production Capacity.....	146
5.5.2	Production Forecasts.....	148
5.5.3	Capacity Utilisation	149
5.6	Particleboard Production Facilities, South East Asia.....	150
5.6.1	India	151
5.6.2	Indonesia	151
5.6.3	Malaysia.....	153
5.6.4	Thailand	154
5.6.5	Vietnam.....	155
5.7	Particleboard Production Costs, South Asia.....	156
5.7.1	India	156
5.7.2	Indonesia	156
5.7.3	Malaysia.....	156
5.7.4	Thailand	157
5.7.5	Vietnam.....	157
5.8	Market forecasts, South Asia	157
5.8.1	Consumption forecasts, South East Asia	157
5.8.2	Trade Forecasts, South Asia	159
5.8.3	Price Forecasts, South Asia	164
5.9	End-use markets for Particleboard, South Asia.....	165
5.10	Potential new applications for Particleboard, South Asia	167
5.11	Quality assessment of Particleboard, South Asia.....	167
5.12	Distribution channels for Particleboard, South Asia.....	167
5.13	Level of promotion, South Asia.....	167
6.	AUSTRALASIA	169
6.1	Economic overview	171
6.1.1	Australia.....	171
6.1.2	New Zealand.....	172
6.2	Building industry forecasts, Australasia	173
6.2.1	Australia	173
6.2.2	New Zealand.....	174
6.3	Furniture industry, Australasia	175

6.4	The forest industry and resource base	175
6.4.1	Australia	175
6.4.2	New Zealand.....	176
6.5	Particleboard industry overview, Australasia	177
6.5.1	Production capacity	177
6.5.2	Production forecasts	178
6.5.3	Capacity utilisation.....	179
6.6	Particleboard production facilities	180
6.6.1	Australia.....	180
6.6.2	New Zealand.....	181
6.7	Particleboard production costs, Australasia.....	181
6.8	Market forecasts, Australasia.....	182
6.8.1	Consumption forecasts, Australasia	182
6.8.2	Trade forecasts, Australasia	183
6.8.3	Price forecasts, Australasia	187
6.9	End-use markets for Particleboard, Australasia	188
6.10	Potential new applications for Particleboard, Australasia.....	188
6.11	Quality assessment of Particleboard, Australasia	189
6.12	Distribution channels for Particleboard, Australasia	189
6.13	Level of promotion of Particleboard, Australasia	189
7.	SOUTH AMERICA.....	191
7.1	Economic overview, South America	193
7.1.1	Argentina.....	194
7.1.2	Brazil.....	195
7.1.3	Chile.....	196
7.2	Building industry forecast, South America	197
7.2.1	Argentina.....	197
7.2.2	Brazil.....	197
7.2.3	Chile.....	198
7.3	Furniture industry, South America	198
7.3.1	Argentina.....	199
7.3.2	Brazil.....	199
7.3.3	Chile.....	200
7.4	The forest industry and resource base, South America.....	201
7.4.1	Argentina.....	201
7.4.2	Brazil.....	201
7.4.3	Chile.....	202
7.4.4	Venezuela.....	203
7.4.5	Uruguay	203
7.5	Particleboard industry overview, South America	204
7.5.1	Production capacity	204

7.5.2	Production forecasts	205
	Particleboard production in Ecuador.....	207
7.5.3	Capacity utilisation.....	207
7.6	Production facilities	208
7.6.1	Argentina.....	208
7.6.2	Brazil.....	208
7.6.3	Chile.....	210
7.6.4	Colombia.....	210
7.6.5	Ecuador.....	210
7.6.6	Venezuela.....	210
7.7	Particleboard production costs, South America.....	210
7.8	Market demand forecasts, South America.....	211
7.8.1	Consumption and trade forecasts, South America.....	211
7.8.2	Price forecasts, South America	215
7.9	End-use markets for Particleboard, South America.....	216
7.10	Potential new applications for Particleboard, South America	217
7.11	Quality assessment of Particleboard, South America.....	217
7.12	Distribution channels for Particleboard, South America	217
7.13	Level of promotion, South America.....	217

Tables

Table I: Real GDP forecasts by region/country, 2008 – 2013.....	vi
Table II: Planned new Particleboard production facilities, by location and capacity, 2010 – 2013.....	ix
Table III: Particleboard production by region/country, 2008 – 2013.....	xi
Table IV: Particleboard capacity utilisation by region, 2008 – 2013.....	xiii
Table V: Particleboard consumption by region/country, 2008 – 2013.....	xvi
Table VI: Net exports of particleboard by region/country, 2008 – 2013.....	xx
Table VII: Particleboard price forecasts for selected regions/countries, 2008 – 2013+.....	xxiv
Table VIII: Demand for Particleboard by end use sector by region/country, 2008.....	xxv
Table 2.1: Economic forecast, United States, 2004–2013.....	7
Table 2.2: Economic forecast, Canada, 2004–2013.....	8
Table 2.3: Housing commencements, North America, 2004–2013.....	10
Table 2.4: Furniture and related industrial production, North America, 1976–2013.....	12
Table 2.5: Furniture imports by country of origin, United States, 1995 and 2006 to 2008+.....	13
Table 2.6: Particleboard production capacity, North America, 2004-2013.....	17
Table 2.7: Particleboard production, North America, 2004-2013.....	18
Table 2.8: Particleboard capacity utilisation, North America, 2004-2013.....	20
Table 2.9: Particleboard production facilities by location and capacity, United States, 2009.....	21
Table 2.10: Particleboard production facilities by location and capacity, Canada, 2009.....	24
Table 2.11: Particleboard production facilities, Mexico, 2009.....	25
Table 2.12: Particleboard Production costs, US West, US South, Canada East, 2009.....	26
Table 2.13: Particleboard consumption, North America, 2004-2013.....	27
Table 2.14: Net imports of particleboard, North America, 2004-2013.....	28
Table 2.15: Particleboard imports by country of origin, United States, 2004-2008.....	29
Table 2.16: Particleboard prices, United States and Canada, 2004-2013.....	31
Table 2.17: End-use markets for particleboard, United States, 2004–2013.....	32
Table 2.18: Particleboard shipments, North America, 2004-2008.....	33
Table 3.1: Key economic indicators, Europe, 2004–2013.....	39
Table 3.2: Housing Completions, Europe, 2004–2013.....	40
Table 3.3: Furniture Production, Europe: 2003-2007.....	41
Table 3.4: Particleboard production capacity, Europe, 2004-2013.....	47
Table 3.5: Particleboard production capacity, Russia and Turkey, 2004-2013.....	48
Table 3.6: Particleboard production, Europe, 2004-2013.....	49
Table 3.7: Particleboard production, Russia and Turkey, 2004-2013.....	50
Table 3.8: Capacity utilisation, Europe, 2004-2013.....	51
Table 3.9: Capacity utilisation, Russia and Turkey, 2004-2013.....	52
Table 3.10: Particleboard production facilities, by location and capacity, Europe, 2008.....	53
Table 3.11: Variable cost of production, Particleboard Europe, 2008+.....	61
Table 3.12: Particleboard consumption, Europe, 2004-2013.....	62
Table 3.13: Particleboard consumption, Russia and Turkey, 2004-2013.....	63

Table 3.14: Particleboard production, net exports, consumption, Europe 2004-2013	64
Table 3.15: Particleboard production, net exports, consumption, Russia and Turkey 2004-2013	65
Table 3.16: Particleboard prices, Europe 2004–2013	67
Table 3.17: End-use markets for Particleboard, Europe, 2004-2013.....	68
Table 4.1: Economic forecast, China, 2004–2013	73
Table 4.2: Economic forecast, Japan, 2004–2013	74
Table 4.3: Key economic indicators, South Korea	75
Table 4.4: Housing commencements, North Asia, 2004–2013.....	77
Table 4.5: Wooden furniture production, North Asia, 2004–2013	79
Table 4.6: Wooden furniture exports and imports, South Korea, 2003-2008.....	83
Table 4.7: Log imports by country of origin, China, 2006–2008.....	84
Table 4.8: Particleboard production capacity, North Asia, 2004-2013.....	88
Table 4.9: Particleboard production, North Asia, 2004-2013	89
Table 4.10: Particleboard capacity utilisation, North Asia, 2004-2013.....	91
Table 4.11: Particleboard production facilities, China	93
Table 4.12: Particleboard production facilities, Japan.....	99
Table 4.13: Particleboard production facilities, South Korea	100
Table 4.14: Particleboard Production costs, China, Japan, South Korea, 2008	101
Table 4.15: Particleboard consumption, North Asia, 2002-2011.....	102
Table 4.16: Production, Net Imports and Consumption of Particleboard, North Asia, 2004-2013.....	104
Table 4.17: Particleboard imports, North Asia, total by country, 2004-2008.....	105
Table 4.18: Production, Net Imports and Consumption of Particleboard, China, 2004-2013	106
Table 4.19: Production, Net Imports and Consumption of Particleboard, Japan, 2004-2013.....	107
Table 4.20: Production, Net Imports and Consumption of Particleboard, South Korea, 2004-2013	108
Table 4.21: Particleboard imports by country of origin, South Korea, 2004 to 2008.....	109
Table 4.22: Particleboard price forecasts, North Asia, 2004-2013.....	110
Table 4.23: Particleboard consumption by end use sector, North Asia, 2004 to 2013	112
Table 4.24: JAS Standards on formaldehyde emission	116
Table 5.1: Key economic indicators, India, 2004-2013	125
Table 5.2: Key economic indicators, Indonesia, 2005-2013	126
Table 5.3: Key economic indicators, Malaysia, 2005-2013.....	127
Table 5.4: Key economic indicators, Thailand, 2005-2013	128
Table 5.5: Key economic indicators, Vietnam, 2006-2013.....	129
Table 5.6: Housing construction, South Asia, 2004-2013	130
Table 5.7: Housing stock, households and housing shortage, India, 1991-2007	131
Table 5.8: Furniture production, South Asia, 2004-2013	135
Table 5.9: Particleboard production capacity, South Asia, 2004-2013	146
Table 5.10: Particleboard production, South Asia, 2004-2013.....	148
Table 5.11: Particleboard capacity utilisation, South Asia, 2004-2013	150
Table 5.12: Planned Particleboard production facilities, South Asia, 2009-2013	150
Table 5.13: Particleboard production facilities, by location and capacity, India, 2008-2013.....	151

Table 5.14: Particleboard production facilities, Indonesia, 2008 - 2013	152
Table 5.15: Particleboard production facilities, Malaysia, 2008 - 2013.....	153
Table 5.16: Particleboard production facilities, Thailand, 2008-2013	155
Table 5.17: Particleboard production facilities, by location and capacity, Vietnam, 2008 - 2013	155
Table 5.18: Particleboard production costs South Asia, 2008	156
Table 5.19: Particleboard consumption, South Asia, 2004-2013#	158
Table 5.20: Net Exports of Particleboard, South Asia, by country 2004-2013.....	160
Table 5.21: Particleboard production, net imports and consumption, India, 2004–2013.....	161
Table 5.22: Particleboard production, net exports and consumption, Indonesia, 2004–2013	161
Table 5.23: Particleboard production, net exports and consumption, Malaysia, 2004–2013	162
Table 5.24: Particleboard production, net exports and consumption, Thailand, 2004 to 2013.....	162
Table 5.25: Exports of Particleboard, Thailand, 2007-2009.....	163
Table 5.26: Particleboard production, net imports and consumption, Vietnam, 2004 to 2013	163
Table 5.27: MDF Price forecasts, Indonesia, Malaysia and Thailand, 2004-2013.....	165
Table 5.28: Particleboard consumption by end use sector, South Asia, 2003-2011	166
Table 6.1: Key economic indicators, Australia, 2004–2013	171
Table 6.2: Key economic indicators, New Zealand, 2004–2013.....	172
Table 6.3: Housing commencements, Australasia, 2004–2013.....	174
Table 6.4: Wooden furniture manufacturing sales and services income, Australia, 1997-2007	175
Table 6.5: Particleboard production capacity, Australasia, 2002-2011	177
Table 6.6: Particleboard production, Australasia, 2004-2013	178
Table 6.7: Particleboard capacity utilisation, Australasia, 2004-2013.....	179
Table 6.8: Particleboard production facilities, Australia	180
Table 6.9: Particleboard production facilities, New Zealand	181
Table 6.10: Variable cost of production, Particleboard Australasia, 2008+	182
Table 6.11: Consumption of Particleboard, Australasia, 2004-2013.....	183
Table 6.12: Production, consumption and net exports, particleboard, Australasia, 2004-2013.....	184
Table 6.13: Particleboard imports by country of origin, Australia, 2004-2008	185
Table 6.14: Production, imports, exports, consumption of Particleboard, Australia, 2004-2013	185
Table 6.15: Production, imports, exports, consumption of Particleboard, New Zealand, 2004–2013+	186
Table 6.16: Particleboard prices, Australasia 2004–2013.....	187
Table 7.1: Key economic indicators – Argentina 2004 to 2013.....	194
Table 7.2: Key economic indicators, Brazil, 2004–2013	195
Table 7.3: Key economic indicators, Chile, 2004–2013	196
Table 7.4: Furniture production in Argentina, Brazil and Chile 2004-2008	199
Table 7.5: Particleboard production capacity, South America, 2004-2013	204
Table 7.6: Particleboard production, South America, 2004-2013	206
Table 7.7: Particleboard capacity utilisation, South America, 2004-2013.....	208
Table 7.8: Particleboard production facilities, South America, 2008.....	209
Table 7.9: Planned particleboard production facilities, South America.....	210
Table 7.10: Variable cost of production, Particleboard, South America, by country, 2008.....	211

Table 7.11: Particleboard production, net exports, consumption, South America 2004-2013..... 212
Table 7.12: Particleboard production, net exports, consumption, Brazil, 2004-2013..... 213
Table 7.13: Particleboard production, net exports, consumption, other South America* 2004-2013 214
Table 7.14: Particleboard prices, Brazil and other South America, 2004-2013 215

Charts

Chart 2.1: Domestic Particleboard Distribution system, United States	34
Chart 2.2: Domestic Particleboard Distribution system, Canada	35
Chart 3.1: Domestic Particleboard Distribution system, Europe	69
Chart 4.1: Particleboard distribution in China.....	117
Chart 4.2: Particleboard distribution system, Japan.....	118
Chart 4.3: Cost of middlemen in the Japanese distribution system	119
Chart 4.4: Particleboard distribution system, South Korea	121

CHAPTER ONE

Introduction

1. INTRODUCTION

Particleboard, invented and first produced in the United States in the early 1950s, is today produced and consumed worldwide and is internationally traded. Particleboard is in a mature phase of the product life cycle where cyclical factors are determining market supply and demand balances, prices, and profitability. It is important that the market is clearly understood, so that producers, investors and traders can plan their operations more effectively, enhance profitability and reduce risk in the short to medium term. A world wide perspective on the industry is an important element of strategic planning and ensuring that companies operating in this industry remain viable and profitable in the long term.

This is the third edition of this report. It is a companion report to “Medium Density Fibreboard in the Pacific Rim and Europe: 2009-2013”. The two reports in combination provide a comprehensive world market report on non structural panels with five year forecasts, and strategic implications for operations, trade and investment.

Particleboard (PB) is a composite panel product consisting of cellulose particles of various sizes that are bonded together with a synthetic resin or binder under heat and pressure. Particle geometry, resin levels, board density and manufacturing processes may be modified to produce products suitable for specific end uses. At the time of manufacture, additives can be incorporated to impart specific performance enhancements including greater dimensional stability, increased fire retarding qualities and moisture resistance.

PB provides industrial users with consistent quality and design flexibility for fast, efficient production lines and high quality consumer products. PB panels are manufactured in a variety of dimensions and physical properties providing maximum design flexibility for specifiers and end users. Typical uses for PB include counter tops, door core, underlay for flooring, kitchen cabinets, manufactured home decking, office and residential furniture, shelving, stair treads and store fixtures.

1.1 Objectives

The main purpose of this report is to provide an assessment of the global prospects for particleboard, so that key players in the industry can identify market opportunities and devise strategies for production, trade and investment. A further aim is to bring to the fore today's key issues and to determine the relationship of suppliers with the main markets.

Additional objectives are to:

- identify current and projected production, consumption and trade flows, competitive dynamics, cost structures and prices over the next five years
- identify the key driving factors which influence buyer response to the use of particleboard, to assist producers to establish defensive and offensive marketing strategies
- identify prospects for new particleboard products and other factors influencing future demand based.

1.2 Methodology

The general methodology used for this study is the product of 30 years of methods research and development by BIS Shrapnel. The methodology utilises the unique experience and background of the author, and combines forecasting techniques with high level market research to develop a product that provides an analysis of the industry over the past five years, the

present, and the expected direction over the next five years. The report is updated every two years, and provides a solid basis for forward planning.

Each country and regional assessment begins with an analysis of the economies, the key end use sectors, and the forest industry and is followed by an overview and detailed analysis of the particleboard industry. A global overview is provided in the executive summary.

The countries in this edition are grouped by geographic region, as follows:

- Australasia
Australia, New Zealand
- Europe
European Union, East Europe and Russia
- North America
Canada, Mexico, United States
- North Asia
China, Japan, South Korea
- South America
Argentina, Brazil, Chile, and other
- South Asia
India, Indonesia, Malaysia, Thailand, Vietnam.

A key element of the methodology is the field research based on interviews with producers, consumers, distributors, associations and research organisations in key regions. The field research, combined with an expertise in economics, forecasting methodology and strategic market research and published data is the basis for the analysis and forecasts for the particleboard industry in each region and country.

1.3 Organisation of the report

The report is organised on a geographic basis, with one chapter for each region.

Each chapter provides an economic overview of the economies and end use sectors (furniture and building) of the key countries and an overview of the particleboard industry, including the resource base, production facilities, production capacity, cost of production estimates where possible, and forecasts for production, consumption, trade, and prices. In addition, there is an analysis of particleboard usage by end-use sector (housing and furniture), an assessment of product quality and prospects for new applications for particleboard, distribution channels and of the level of promotion.

A global overview of the prospects for particleboard and an interregional comparison is provided in the executive summary.



Particleboard and Medium Density Fibreboard in the Pacific Rim and Europe: 2009 – 2013

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FORESTRY

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