

# FOCAL POINT: CHINA EDITION

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## CHINA'S DEMAND AND DISTRIBUTION SYSTEM FOR WOOD PRODUCTS

During the past decade China has emerged as one of the modern world's greatest economic success stories. Since Deng Xiaoping's "open door" policy was adopted in 1979, China has become the world's third leading trading economy and the world's sixth largest economy with a \$1.4 trillion GDP in 2005.

Other policies, such as privatization of the housing market, have been significant to China's economic growth. Initiated in the early 1980s, privatization led to huge consumer demand for larger and better quality homes with modern amenities and stimulated demand for interior finishing services, furniture, appliances, and other complimentary goods and services. In 2002, spending on real estate projects increased 31% to \$97 billion, accounting for 6.6% of China's GDP and making it the country's fourth largest industry.

At the same time, China has become the "workforce for the world", manufacturing wooden furniture, flooring, doors, and an array of non-wood building materials. In 2004, China received \$61 billion in Foreign Direct Investment,

*(China's Distribution System continued on page 3)*

### US-CHINA BUILD PROGRAM

The US-China Build Program (USCB) is a cooperative business assistance program managed by Evergreen Building Products Association and the American Forest & Paper Association, with federal support from the US Dept. of Commerce Market Development Cooperator Program and USDA Foreign Agricultural Service. USCB promotes exports of US building products and services to China's residential and light commercial construction market. USCB offices in the Pacific Northwest and Shanghai are available to assist US companies. For more information about how your company can participate in USCB and opportunities available to US exporters in China's construction market, contact Rose Braden at (503) 248-0406 or rbraden@uschinabuild.org.



## CHINA SALES MISSION PARTICIPANTS REPORT \$1 MILLION IN EXPECTED SALES

Participants in this year's US-China Build sales mission and seminar series considered the mission a success, reporting the signing of 13 new distributors and projecting \$1 million in sales over the next year as a result of contacts made at the seminars. Now in its fourth year, the seminar series has developed a strong following among both US and Chinese companies.



*Seminar participants talk with US company representatives during the mini-trade show portion of the 2005 seminar series.*

This year's seminars, which were held in Shanghai, Chongqing, and Beijing included company specific presentations by eleven US building products companies, four of which were repeat participants. The seminars also included a keynote presentation about the use of US wood products for interior design by Mr. Xu Fang, Technical Director of the American Forest & Paper Association China Office.

Each seminar was accompanied by a mini-trade show where companies displayed products and distributed literature. Products represented this year included treated and structural lumber, windows and doors, insulation, paint and coatings, ground source heat pumps, and geothermal heating systems.

*(Sales Mission continued on page 4)*

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## SHANGHAI TO INSTALL SOLAR PANELS ON BUILDING ROOFS

Reprint from the Shanghai Daily, 09/15/05

Shanghai's municipal government has approved a proposal to install thousands of solar panels on the roofs of office and apartment buildings, universities and nursing homes as part of a three-year plan to increase the use of green energy.

Under the plan 100,000 square meters of solar panels will be installed over the next two years. According to a municipal spokeswoman "[The] pilot project will showcase the advantages of solar energy, which is clean, renewable and inexhaustible." The city of Shanghai will subsidize the solar panel project. It also plans to establish several power generators with a combined capacity of 5,000 kilowatts by 2007.

Thirty projects that combine urban construction with solar energy will be completed by 2007. They will involve Songjiang University Town, high technology parks and New Jiangwan City, a residential complex in Yangpu District. A solar power generation project will also be built on Chongming Island. Solar panels will also be installed at 20 to 30 factories that are heavy industrial power users. Several landscaping lighting systems in the city's downtown core will also be powered by solar energy in the near future.

### CHINA'S BOOM: IMPLICATIONS FOR INVESTMENT & TRADE IN FOREST PRODUCTS AND FORESTRY

January 18-20, 2006  
Westin Bayshore Resort, Vancouver B.C.

Join organizers CINTRAFOR, Forintek Canada Corp., RISI, the Forest Products Society, CIBC World Markets and the USDA Forest Service for this two-day conference to learn about China as a consumer and competitor in the global forest products industry. Experts from the US and China will discuss China's political and business environment, government support and subsidies for local companies, present and future fiber supply and demand, as well as China's role as a consumer and competitor in the global wood products market.

For more information about the conference including a detailed agenda, please visit the CINTRAFOR website at:

[www.cintrafor.org/CONFERENCE\\_TAB/overview.htm](http://www.cintrafor.org/CONFERENCE_TAB/overview.htm)

## ADVERTISE IN THE CHINESE- LANGUAGE HOUSING & BUILDING PRODUCTS NEWSPAPER

Reach thousands of readers by advertising in Issue 9 of the Chinese-language US Housing Industry & Building Materials Newspaper.

Each issue of the newspaper contains information about US building materials, energy efficient products and design, project and product profiles, industry innovations, and a question and answer column. The paper is mailed to our database of 10,000 Chinese companies, posted on the US-China Build Chinese-language website, and distributed at trade shows and seminars.



The spring issue will also be distributed to building materials specifiers and distributors at the Building China 2006 show.

### Ad Rates

Ad Size	Non-Member Rate	EBPA Member Rate
Full Page	\$1935	\$1742
1/2 Page	\$1305	\$1175
1/4 Page	\$900	\$810
1/6 Page	\$720	\$648
1/12 Page	\$473	\$426

**Order Deadline:** February 24, 2005

**Payment Deadline:** February 29, 2005

**Ad Copy Deadline:** February 29, 2005

Companies who purchase a 1/4 page or larger ad will receive a free 250 word product profile with a photo. Color ads are available for an additional 10% of the standard ad price. For more information about advertising, distribution, or product profiles, or to place an ad, please or contact the USCB office at 503-248-0406.

(Distribution Systems continued from page 1)

surpassing the US for the first time. To feed the construction and manufacturing industries, China imported \$3.3 billion in wood products ranging from primary processed goods such as logs and lumber to secondary goods such as wood flooring, windows, and joinery.

While the trade statistics are useful for understanding the volume and types of products in demand, exporters still only have a partial understanding about the distribution system for imported primary and secondary processed wood products. In other words: What is the process that Chinese buyers go through to locate and purchase imported building materials?

To answer this question The Center for International Trade in Forest Products (CINTRAFOR) at the University of Washington is performing an assessment of the Chinese distribution system for wood-based building materials. Researchers interviewed developers, distributors, and purchasing agents. The report, which will be available in January, will outline China's domestic timber supply, supplier trends, distribution channels for imported wood products, and product specific markets.

### Domestic Timber Situation and Supply

Decades of over-harvesting during the cultural revolution left China's forest severely depleted. While harvest restrictions and new plantations of fast growing high yield species have increased the volume of standing timber, China remains a net importer. In 2004, China's timber consumption was 300 million cubic meters, half of which was imported. According to analysts, initiatives to substantially increase forest area as a means to lessen dependence on imports are unlikely to have a significant impact on China's domestic timber supply.

### Imports and Distribution Systems

Given China's supply of inexpensive labor and lower infrastructure costs, logs lead the country's imports (29 million m<sup>3</sup>).

There are two distribution systems for logs and lumber used by manufacturers. The system used is based primarily on the volume required. Russian logs arriving via rail have perhaps the most simple and direct distribution process. Over 90 percent of Russian logs, most of which are used by plywood manufacturers, are imported via rail through three northern China-Russia border town ports. Once Russian logs and lumber arrive in the ports, distributors/traders post their phone numbers on the rail cars and distributors and manufacturer's purchase agents call the distributor directly.

Logs and lumber from Africa, Southeast Asia, and approximately 10 percent of the volume of Russia logs that arrive at China's water ports unsold follow a more complex distribution system. Importers rent warehouses at

the ports where logs are transported after offloading. "First tier" distributors purchase these goods from importers and deliver the logs and lumber to manufacturers and "second tier" distributors. Second tier distributors then sell the logs and lumber to small manufacturers and interior finishing companies through their own regional outlets such as the Furen hardwood timber market in Shanghai.

Large manufacturers, however, purchase lumber directly from Southeast Asia, Europe, and North America directly through traders or sourcing offices located in China or the country of origin.

Smaller manufacturers purchase their materials at the port. Manufacturers using Southeast Asian species buy from local distributors because they often do not have the connections to source their own wood due to the increase in intense competition resulting from log export bans.



*Small manufacturers, such as this door factory producing products for export to the US and Japan purchase lumber from secondary distributors.*

### Distribution System for Building Materials

The interior decoration industry, or contractor firms that finish the interiors of condominiums, are also a significant end-market for imported lumber. Since the Chinese building code does not outline standard door or window sizes the majority of the doors used are built on site by finishing contractors. These doors are not included in the national statistics. These contractors typically purchase their lumber and other supplies at traditional building materials markets. Larger contracting firms reportedly purchase materials from some of the large home centers or big box retailers. More recently, as a result of the trend toward providing finished housing as opposed to the traditional unfinished concrete "shell", large developers are contracting with big boxes to provide finishing services. Big box retailers are also partnering with large contractors in supplier relationships.

Most US lumber and value-added wood products suppliers work with local distributors. Some of these local distributors have offices in one or more regions of China where they employ a number of employees to network with architects, developers, and government contacts to identify new projects. Some local distributors may have stores at traditional building materials centers.

Much of the local distributor's focus is on finding qualified regional distributors and developing good contacts with in-

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(Sales Mission continued from page 1)

Approximately 320 construction professionals from the fields of real estate development, construction, architectural and interior design, outdoor landscaping design and construction, and buyers from trading companies and home centers attended the seminars. The question and answer periods in Shanghai and Beijing were particularly lively. Audience members asked questions about the durability of wood frame housing in light of the destruction that they have seen from Hurricane Katrina. Housing longevity is a primary concern of Chinese single family home buyers due to the high price these homes command and the tradition of passing homes down through generations. Shanghai is also frequently hit by hurricanes and typhoons during the summer.



**Approximately 320 Chinese construction professionals and traders attended this year's seminars.**

#### **2005 Sales Mission Participants**

- State of Idaho Trade Promotion Office
- Weather Shield Windows
- Pella Windows
- Weyerhaeuser/Trus Joist
- WFI Global (Geothermal Heating)
- HMI Worldwide (Cellulose Insulation)
- Southern Forest Products Association represented by North Pacific Lumber
- United Coatings (Paint and Industrial Coatings)
- Gulf South Forest Products (Southern Yellow Pine)
- Western Wood Preservers Institute represented by Exterior Wood Co.
- Calorique (Heating Systems)

Seminar participants also had a number of questions about treated wood, including the use of CCA's in residential applications. Audience members raised concerns about treated wood splitting and checking and asked how to avoid this. Participants were particularly concerned about the longevity of treated wood once installed. Given the short track record that wood has in China, suppliers and contractors need to take into consideration when making proposal to the developers.

For more information about the 2006 sales mission and seminar series contact US-China Build.

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dustry representatives. The head distribution office trains regional distributors about product features and applications, and then each regional distributor is responsible for their own operating costs and employee payroll. Some of the more successful companies also require distributors to submit minimum deliverables, such as a pre-determined number of new contacts, on a regular basis .

Distributors generally stock a limited supply of product in China, if any. According to several US exporters, they do this to avoid the 17% value-added tax they must pay for products and the added maintenance and rental costs associated with local distribution centers. Distributors also tend to want 180 day payment terms and longer-term product prices, which suppliers avoid due to rapidly fluctuating lumber prices.

Because of China's limited use of wood as a structural material and the higher price of US wood products compared to domestic and Southeast Asian competitors, the sale of structural wood and wood-based building materials from the US tends to require more involvement from distributors. Some of the more successful distributors spend a great deal of time educating architects about China's wood frame building code and proper construction and installation practices. This in turn helps the distributor develop a reputation as a recognized expert and stimulates interest in the products. The distributor is also often available, with support from the US headquarters, to provide engineering, installation, and design advice to the architect and contractors. According to one US exporter, "A good distributor offers additional services such as design and engineering services, which helps sell the products."

According to a Chinese distributor, despite the fact that Chinese projects are large and homeowners want good design and construction materials, price is a primary barrier for the use of US building products. While US suppliers often lose domestic contracts because they aren't price competitive, long lead times required for products to arrive in China (which can be 2-3 months) are a more significant barrier. It is also hard for Chinese agents to maintain inventory in China, since most are small companies with limited cash flow. This distributor suggests that US suppliers maintain regular communication with the planning and architecture firms in charge of large projects to understand their material requirements and project schedule. This way they can schedule deliveries in accordance with the project timetable.

More information about China's distribution system and market for hardwood and softwood lumber, windows, doors, joinery, and flooring will be included in the final report which will be available through CINTRAFOR. For information about CINTRAFOR, please go to [www.cintrafor.org](http://www.cintrafor.org) or call 206-543-8684.

## EIGHT NEW MEASURES TO SLOW CHINA'S REAL ESTATE MARKET

By Lindsay Zhu, Squire, Sanders & Dempsey L.L.P.

In order to reduce real estate speculation and cool the overheated real estate market, seven of China's State Council departments have approved eight nationwide measures ("Measures"), effective June 1. Among them, two major measures in particular are noted: 1) taxation measures on residential houses and 2) restated policies on undeveloped land.

### Undeveloped Land

The new measures restate the policies on unimproved land to prevent speculative land hoarding. The Measures require land owners to pay holding fees on land that was purchased and specified for development in the land use rights contract if no development takes place within a year of the date of purchase. The government also has the right to revoke the right of the landowner to develop the land and keep the land use fee if the land remains vacant for more than two years.

The policy was adopted in the 1980s and included in several laws and regulations, yet the holding fees or reclamation measure were never strictly enforced.

However, due to continuing concerns about a real estate market bubble, the Ministry of Land and Resources began intensifying control over undeveloped land in an Urgent Circular issued in December 2004. In the circular, the Ministry demanded that local governments investigate the status of all undeveloped land in urban areas. Meanwhile, the State Council released several Opinion or Decisions, as well as the Measures, to emphasize the significance of clarifying the status of undeveloped urban sites. As a result, many local governments have issued detailed rules to implement the law. For example, Guangzhou provides that holding fees for land used for commercial purpose should be 0.5% of the total grant fee per month, while the percentage for land used for infrastructure is 0.4%. Jiangsu and Hainan Provinces have also announced their own standards for holding fees.

Although most cities, including Beijing and Shanghai, have not yet adopted implementation rules, companies holding undeveloped land reclaimed should be alert to measures that might allow it to be reclaimed.

### Taxation on Residential Houses

The Measures also address speculative real estate sales and "house flipping". The policy imposes a 5% tax based on the full resale price of all residential homes sold within two years of their purchase. Previously, the

## KUNMING BANS FOREIGN DEVELOPMENT NAMES

Reprint from the China Daily, 09/14/05

The southwestern Chinese city of Kunming, the capital of Yunnan Province, is forcing developers to change the names of properties deemed too foreign-sounding, saying they debase traditional culture.

At least nine developments in Kunming have changed their names since officials began implementing new guidelines last month. "Paris of the East Plaza," "French Gardens," and "Ginza Office Tower," were among those making the change.

Foreign sounding names are popular in China, lending exoticism to cookie-cutter housing developments and office buildings springing up in urban centers. Many are targeted at China's rising middle class, who are better educated and increasingly drawn to foreign travel, culture and ideas.

Kunming enacted rules against naming developments after foreign places, people, brands or companies in 1997. The new guidelines were issued in August to add emphasis following a denunciation of the practice by Kunming Communist Party Secretary. "If developers still continue to use foreign names, their projects won't be allowed to start," Xiao said.

A spokeswoman for Kunming Zhujia Real Estate Co., developer of the "White House Mini District," who has changed the development name said "The old name seemed to suit the project, but I don't think there will be any effect on sales".

holding period was one year. If a house is sold after two years, the business tax is levied only on the difference between the original purchase price and the resale price, and only on houses classified as "non-ordinary" residential houses.

To be classified as ordinary housing, the house must be less than 1.2 times the average price of houses in the same region. Local governments are allowed to adopt regional criteria to increase or decrease the relevant size of the residence or the average price within a 20% range. Most cities make full use of the range. For example, in Shanghai, ordinary housing is defined as less than 140 square meters in size and less expensive than 1.44 times the average price. Some cities, such as Nanjing, have gone beyond the Measures, by imposing a 20% capital gains tax on the difference between the purchase and resale price.

For more information, contact Squire, Sanders & Dempsey L.L.P. at [www.ssd.com](http://www.ssd.com)

## US-CHINA BUILD 2005 ACTIVITIES

<p><b>Advertising: Issue of the US Housing &amp; Building Materials Newspaper</b></p> <p>See page 2 for advertising rates.</p>	<p><b><u>Reach over 10,000 readers with an ad in Issue 9 of the Chinese-language US Housing Industry &amp; Building Materials Newspaper.</u></b></p> <p>The spring issue will also be distributed at the US Pavilion at the Building Beijing 2006 trade show.</p>	<p><b>Order Deadline:</b> February 24, 2005</p> <p><b>Payment Deadline:</b> February 29, 2005</p> <p><b>Ad Copy Deadline:</b> February 29, 2005</p>
<p><b>2006 EBPA Winter Gateway</b></p> <p><b>Date:</b> January 9-10, 2006</p> <p><b>Location:</b> Seattle, WA</p>	<p><b><u>Join using welcoming delegations from the Pacific Rim for 2006 EBPA Winter Gateway.</u></b></p> <p>Builders, architects, developer and building materials importers from these important export markets will participate in this two-day technical seminar and site visit program showcasing western-style construction and interior design organized by EBPA.</p> <p>A tabletop display at the mini-trade show and reception is a unique opportunity to promote your products and services to a diverse overseas audience at a very affordable price.</p>	<p><b>Mini-Trade Show + Reception</b> EBPA Members: \$80 EBPA Non-members: \$100</p> <p><b>Reception Only:</b> EBPA Members: \$30 EBPA Non-members: \$35</p> <p><b>Interpreters for mini-trade show:</b> \$30 per interpreter</p>
<p><b>EBPA Annual Meeting &amp; Seminar Luncheon</b></p> <p><b>Dates:</b> November 30, 2005</p> <p>Radisson Hotel Sea-Tac, WA</p>	<p><b><u>Join EBPA for our Annual Meeting and Seminar.</u></b> Network with fellow US manufacturers and service providers at this business luncheon.</p> <p>The program will include a seminar and roundtable discussion on emerging markets for residential construction and building materials.</p>	<p><b>Members and Non-Members Welcome to this event.</b></p> <p><b>Cost: TBA</b></p>

## IKEA PLANS GIANT STORE IN CHINA

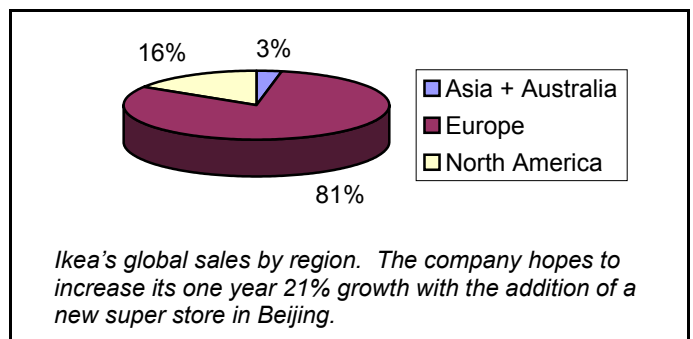
IKEA, the world's leading home furnishing retailer, announced plans to open a massive outlet store in northern Beijing next spring, following the success of its first Beijing store. The new store will be the first global standard IKEA store in Beijing.



Ikea's success in China has been explosive with sales revenues for the 2005 fiscal year increasing 21 percent over FY2004. More than nine million people have visited IKEA stores in Shanghai and Beijing.

Responding to urban Chinese consumers' small living spaces, in 2006 IKEA will focus on the theme of "Store & Organize," providing customers with smart solutions for the bedroom, bathroom, living room and even the balcony. A substantial portion of the new products launched in 2006 will focus on home storage, strengthening IKEA's message of providing easy, convenient ways of living.

According to Linda Xu, IKEA China's public relations manager, compared with five years ago, "sales revenues rose 34.5%, while sales volume grew 500%. However, its success was based on price decreases of nearly 44 percent from 2000."



Xu was optimistic that the new Beijing store would be IKEA's second largest store in the world, second only to its Stockholm, Sweden location.

## SUMMER GATEWAY FEATURES SHOW HOMES, SITE VISITS

Developers, builders, architects and interior designers from Japan, Korea and Taiwan visited Seattle, Washington from July 18 – 19 for the 2005 EBPA Summer Gateway Program. The two-day tour of private residences, model homes and construction sites showcased the newest trends in US architecture, interior design, construction and building materials.

The main attraction for many international participants was a visit to the 2005 Seattle Street of Dreams. The luxury home and garden tour featured seven fully furnished, luxury show homes ranging in size from 3,700—7,950 sq. ft. on .81 to 1.87 acre lots. Homes were priced from \$2.275 – 3.1 million. Homes on the tour were considerably larger than would normally be found in the visitor's countries, but the event is still seen as a rare opportunity for an inside look at luxury living and lifestyle trends in the US and as an important source for project ideas.



*Korean visitors learn about applications for Weyerhaeuser Timberstrand products during Tacoma Yard tour*

Delegations also visited a number of other sites that were met the interests and needs of their respective markets. Japanese and Taiwanese visitors participated in "Custom Home Design and Construction", a program focused primarily on luxury residential housing projects and featured visits to other high-end custom homes and remodel projects. Two different programs were offered for Korean attendees—one focused on urban

redevelopment and mixed use residential development master-planning and marketing for real estate developers and planners, and another featuring visits to model homes, construction sites and wood products manufacturing companies for builders, architects and building materials importers.

Pacific Northwest building materials manufacturers and export companies also met with the delegations at a mini-trade show and networking reception held in conjunction with the visit.

The 2006 Winter Gateway Program is tentatively scheduled for Jan. 9—10, 2006. For more information, contact EBPA at (253) 396-0131 or e-mail [evgreen@ep.org](mailto:evgreen@ep.org).

## EBPA ANNUAL MEETING & LUNCHEON SEMINAR

~WED., NOVEMBER 30TH~  
SEATTLE, WASHINGTON



Don't miss out on this opportunity to make contacts and access valuable information for your business. EBPA is pleased to welcome Mr. Anders Berglund, Co-Owner, IKEA—Seattle, as the lunch keynote speaker at this year's event. Mr. Berglund will speak about "*The IKEA Business Philosophy: Bringing Swedish Business Practices to the US*". "*Emerging Markets—Opportunities for US Building Products*" will be the theme of a seminar and roundtable discussion to be held prior to the networking lunch. See the EBPA web site at [www.ep.org](http://www.ep.org), or call (253) 396-0131.

## EBPA WELCOMES NEW MEMBERS

Evergreen Building Products Association recognizes and welcomes the following companies to our membership:

- ***L&M International Sales & Marketing***, an international manufacturer's representative company with over 15 years experience working in the Japan, China and South Korea on behalf of North American companies.
- ***Ma Architecture***, a full service architecture and interior design firm specializing in residential and retail projects, that also offers branding, strategic positioning, and graphic design services for retailers and others. Extensive overseas market experience, particularly in Japan.
- ***Hamilton Drywall Products***, a leading manufacturer of drywall finishing products. Product line includes: joint compounds, textures, setting compounds, primers and tape. Located in Woodland, WA, the company is in close proximity to three major ports serving the Pacific Rim.

For more information about EBPA, our programs and membership, visit EBPA on the World-Wide-Web at <http://www.ep.org> or contact us directly at (253) 396-0131, e-mail [evgreen@ep.org](mailto:evgreen@ep.org).

## EBPA CALENDAR OF EVENTS

- |            |   |
|------------|---|
| Nov. 30    | <b><i>EBPA Annual Meeting &amp; Seminar Luncheon</i></b><br>(Seattle, Washington)   |
| Jan. 9-10  | <b><i>EBPA Winter Gateway Program</i></b><br>(Seattle, Washington)  |
| Jan. 9     | <b><i>Mini-Trade Show &amp; Reception</i></b><br>(Seattle, Washington)  |
| Jan. 11-14 | <b><i>2006 International Builders Show</i></b><br><b><i>US-China Build Program—Booth # S11237</i></b><br>(Orlando, Florida) |

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**RETURN SERVICE REQUESTED**

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**USCB Organizers:**

- *Evergreen Building Products Association*
- *American Forest & Paper Association*

**USCB Partner Organizations:**

- *Center for International Trade in Forest Products, University of Washington*
- *USDA Foreign Agricultural Service*
- *Softwood Export Council*
- *US Department of Commerce (Market Development Cooperator Program)*
- *Washington State Department of Community, Trade and Economic Development*

**www.uschinabuild.org**

The bilingual website is regularly updated to bring you the latest information about China's residential construction market including:

**View New Content:**

- Searchable Directory of US Exporters to China
- Schedule of Chinese Trade Shows
- USCB Chinese-language Housing Newspaper
- Links to other China-related websites