

# KILN DRYING FOR JAPAN OPPORTUNITIES & REQUIREMENTS

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## TRENDS IN KILN DRYING

Thank you for your interest

Involved in much kiln drying, it is my pleasure  
Have spent over 7 years in Japan  
Just got back last week (37th time on that 747 flight)

What's happening

I have significantly changed my opinion of the situation  
The Japanese economic machine set to make recovery  
Expect some good things in next few years  
Lots of jobs to be transferred offshore  
Although still major problems - like everyone else!

Kiln drying

Major restructuring taking place  
Distribution and drying

Move towards more stable, dryer products

Impact on component areas?

Which products are going dry, which not?

Clears                   - thin - already dry-end of discussion  
                              - thick - no

Prefab                   - already kd  
                              - more and more share

2x4                       - kd-end of discussion  
                              - Growing share

Traditional house

- This is the major interest area
- Still 55% of square footage
- What will happen here? Posts and beams
- Smaller structural support
- Clear components

Major trends

Precutting - 700 plants  
Shorter building time  
Longer house guarantees  
Second growth

Still not going kd

Sill plates - pressure treated  
Floor joists (obiki)  
Roof trusses (90mm moya)  
In effect, 90mm and 105mm - 4m products

The rest? Its a toss-up for which will go kd and which will go laminated.

#### Posts

Stripping and air drying

Laminating

Kd is not easy to crack - price

Need advantage shipping- Tolko in interior

Touch grade, hard to kd 2nd growth

Old growth- not as much need, not price competitive

Leaders Sumirin, Kinoshita, etc. - going laminated

Some Hokkaido plants goind kd

My forecast is that ultimately air dried and laminated products will take 50% market share and stay there pretty well.

#### Hirakaku

Stripping and air drying

Large structural laminated very popular

Parallam, too

#### Forecast - even battle

Air dried winning, laminated 2nd, kd 3rd

Could go to 50% share

#### Studs (Mabashira), bracing

Increasing kd as air drying more trouble forecast - may take 30-40% share in next 5 years Small structural (30 x 40, etc).

#### NEDA

Some B.C. majors will be going kd in 45mm

As shorts of European program

#### Summary

Some green

Dry - air, and kiln

Some laminated

#### What should you do?

Follow the trends - really focus

Don't dry -

- Unless you can recover costs

- Or unless market stops buying green

- But don't push the market

Baby square producers

Should you be building kilns for squares?

No, but for laminated, prefab - yes

### REQUIREMENTS FOR DRYING

Accurate sizing

Good kiln preparation

Well placed strips, dunnage

Good piece alignment

Accurate drying

Tight m.c. Curve

Good kiln control

Good kiln maintenance

Care after drying

Dunnage

Straps

Packages protected