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Abstract

Exporting for small-scale forestry enterprises

This paper examines requirements for entry into international timber markets such as export specifications, logistics and timber labelling. It investigates methods for family-farm enterprises to become involved in the international trade of timber. Small-scale farm enterprises would benefit from exposure to larger markets for their timber. They would experience more stable demand markets from a larger consumer base and obtain rates of return that might provide more adequate compensation for their efforts. At present the choice of farm forest species planted is more likely to be based on local demand factors, local knowledge and environmental factors without consideration for potential sales in wider markets. This paper argues that exposure to international trade can create an impetus for change that would be beneficial for the small-scale forest sector.

Keywords: small scale forestry, export criteria for farm forestry,

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Speaker Resume

Michael Cox is an academic in the School of International Business at Queensland University of Technology, Australia. His interest in forestry originates from work done with the Queensland Government forest department in pricing of plantation timber, also from involvement in trade delegations to Asia to find markets for a local species *Auracaria cunninghamii* and his association with the IUFRO Small Scale 3.08 group attached CRC TREM in Queensland where his interest in small scale forestry potential has developed.

Introduction

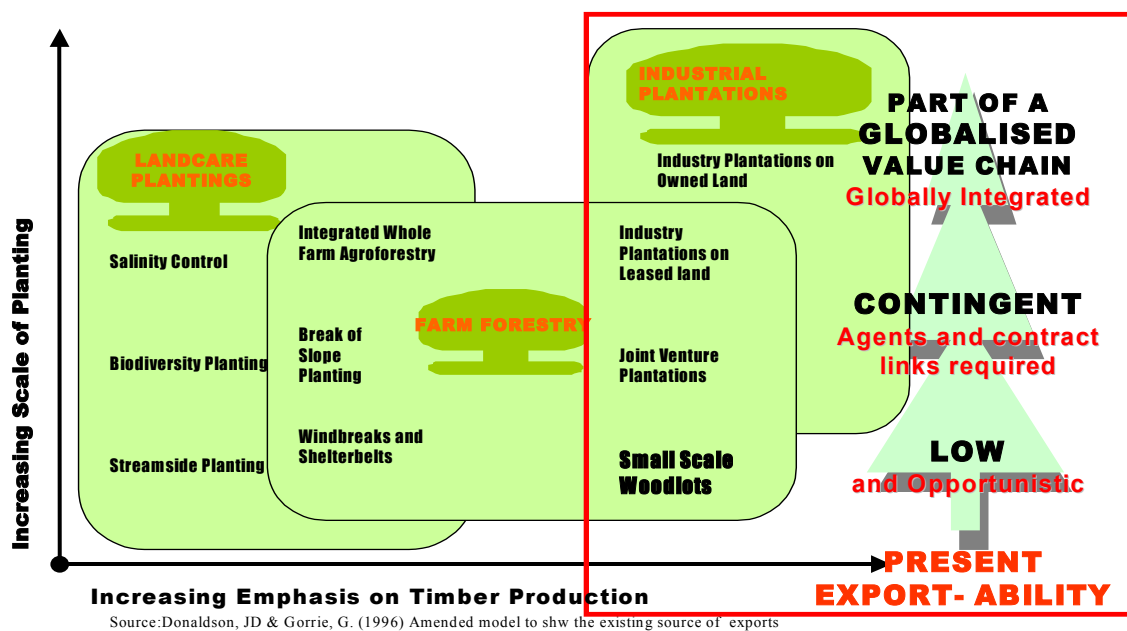
Farm forestry in Australia has found greater government and private support in the period when globalisation of markets and the uptake of new business methods have changed the nature and scope of business. Like other industries, industrial timber processors and traders have benefited among other issues from the integration of electronic data interchange (EDI) into business practices, improved logistics and greater involvement in the global economy through vertical integration plantation development and exporting to new markets.

The success of the global economy has been paralleled by the growth of eBusiness, where internet based technologies are being used to enable the more efficient conduct of business. Farm Forestry in Australia has been defining itself in this same period of growth of globalised markets and accelerating adoption of eBusiness industry practices. Can farm forestry take advantage of new business practices and become part of an export culture in this new globalised economy? If farm forestry is to become involved in the globalised economy it will have to embrace the opportunities for export and if necessary adjust its practices to meet the demands of the new economy.

Small scale forestry structure in Australia and the source of exports

Australian small scale forestry involvement is illustrated in Figure 1 (Donaldson & Gorrie 1996), which demonstrates not only the plantation continuum but also the diversity inherent in the reasons for farm forestry plantings in Australia. These broad rationales involve integrated land management, independent owner plantations and alliances with industrial timber plantings. In contrast to the commercial rationale evident with industrial plantations, farm foresters may have a range of interests that compete with exclusive commercial outcomes for their timber resource. These interests are broadly environmental, socio-economic and commercial.

Figure 1: Australian Farm Forestry structure and the source of exports



An ability to deliver multiple benefits is seen by small-scale forestry supporters as a strength (Future Directions for Farm Forestry in Australia, 2000) but in the context of a globalised economy the benefits that come from environmental and socio-economic outcomes are benefits restricted to national and regional economies. Environmental benefits from farm forestry could be treated as externalities beyond the private benefits of the small scale forest owner but are not yet clearly quantifiable, and so a value cannot be allocated in the same way

that a market will value a wood harvest. Despite this, non-wood environmental services are being actively investigated in Australia for their potential in markets that will use tradeable permits (Buffier 2002, Binning 2002). The potential for carbon, salinity and landcare trading exists, but is not yet commercially established and until such time no export market is likely for these environmental services. It is feasible that this could become a major source of farm forestry income, both domestic and export if its promise is realised. This could provide small-scale forestry with a means to take part in any 'new world economy' that trades in these credits. It may also provide a means of balance against the growth and dominance of agribusiness in the forest industry. At present, the lack of an active international market means there is no export return possible for small scale farmers.

The socio-economic benefits of small scale forestry concern employment, land values, services provision and income from harvested timber. These benefits are associated with good farming practices and can have identifiable impacts on the local economy. Planting trees for farmers is a complex decision making process which has been examined in detail in other areas (Fulton and Race, 2001). The reasons for planting decisions are diverse and include marginal land use, conservation, shelter and economic returns and although the final rationales for commitment are diverse, the economic concerns of potential small scale adopters have always been dominant in surveys. The economic and social factors inherent in decision making are still seen as an area of unresolved debate, but in a survey of farmers in three major areas of small scale farming in Australia Curtis (1998) identified economic reasons as dominant in concerns about the viability of farm forestry. Specific issues such as its economic viability, long term market prospects, prospects for fair returns with joint ventures and market knowledge outweighed production issues related to management and silvicultural practices.

Supporting this view a survey by Private Forests Tasmania in 2000 indicated that 'good husbandry and farm improvement' were the major motivations for planting trees, with only 13% of respondents indicating that small scale forestry was a good investment in the long term. If small scale forestry is to be part of the globalised economy then it is going to have to do so under the existing international paradigm, and that means a commitment to the economic considerations for planting for a wood product, at least until alternative trading regimes are commercially established. An economic reluctance to commit can be influenced by accepting shared risk through joint ventures and lease arrangements that will reduce these concerns, but to be viable in the current new world economy economic considerations will have to form a greater part of the reasons for involvement in farm forestry. The new world economy is committed to export trade and to be part of an export culture means accepting a commercial rationale for involvement as dominant in the decision making process.

The size of farm forestry given the existing structure

Table 1: Small scale estimates from the Australian National Farm Forest Inventory

Sectors	Hectares	% Share	Ind and Govt JV & Lease	Private JV & Lease	Small scale estimate ²	Average Holding hectares ¹	Estimated Number farms
Small scale owners	67000	5			67000	5	13400
Joint ventures public/private/govt	104000	7		58800	58800	40	4200
Leasehold public/private/govt	189000	13		109200	109200	40	
Sub total	360000	25	125000	168000	235000		17600
Industrial plantations on company owned land	858000	58					
Undisclosed survey data	267000	18					
Total Australian Plantation estate	1485000	100					

¹ estimate of 40 hectares from Stephens (2001)

² Small scale estimate based on the known ratio of JV to Lease

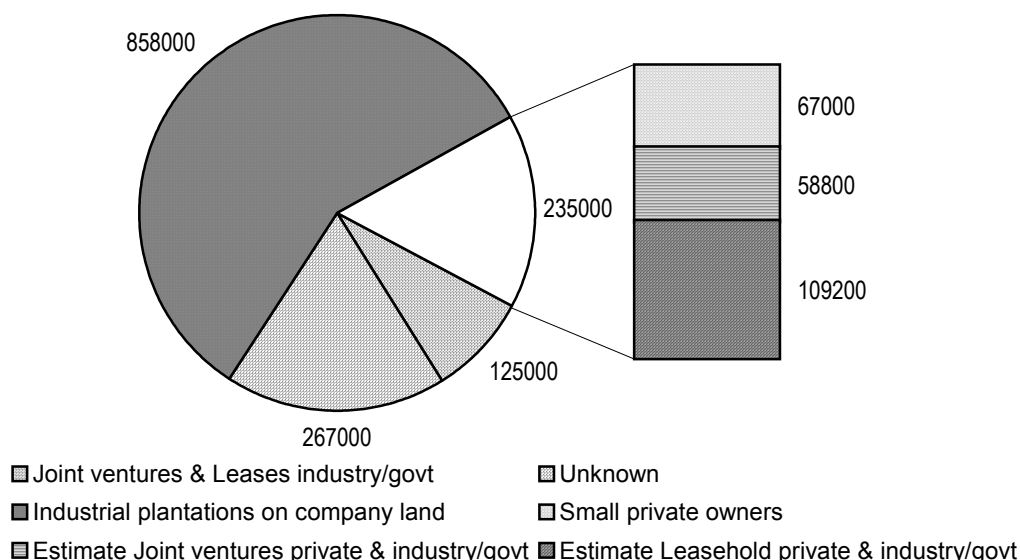
Timber production in Australia is supplied from plantations on owned and leased land. These plantations contribute the greatest scale of plantings. The remainder of the plantation estate comes from joint venture plantings and farm woodlots, which supply the smallest scale of plantings. New plantations on private land now provide the majority of new sources for wood supply in Australia. A clearer idea of the size of these land holdings has emerged with the Plantations of Australia 2001 report (Wood et al. 2001). Through the work of the

National Forest Inventory and the National Farm Forest Inventory it has been possible to extract details of the contributions that come from small scale forestry sources.

Small scale forestry has an identifiable link with 25% of the national plantation resource. Table 1 and Figure 2 provide a representation of the relative size and share of the small scale forest sector based on the National Plantation Inventory. Of the 293000 hectares identified as lease and joint ventures, 125000 hectares have been identified as arrangements between industry and government or each other (Stephens et al 2001). The remaining 168000 hectares were private lease or joint venture arrangements between industry and small scale farmers or government and small scale farmers. If the same ratios between known joint ventures and lease arrangements held, this would mean a split of 58800 hectares to joint ventures with private forestry and 109200 to lease arrangements with small scale farmers. Lease arrangements are more attractive to small scale farmers, because they imply regular payments and less risk and are also attractive to industrial processors, it is likely that lease levels are higher than these estimates for farm forestry for that reason.

These estimates are changing as data is refined and updated. The latest revised estimates, (National Forest Inventory 2002) indicate that the plantation estate is 1,568,900 hectares and the joint venture and lease arrangements amount to 172,579 hectares. They also indicate that the small private sector owners identified in the table above are less in than the 5% indicated as greater growth in plantings have come from industrial plantations and not small scale plantings.

Figure 2: The Australian Plantation estate and Small Scale Forestry interest identified in hectares



Given the information in Figure 2, small scale forestry is estimated to be involved in 16% or 235,000 hectares of the plantation estate according to the 2001 data. These figures indicate that much of the estate involved with farm forestry is associated with industry or government arrangements. The area under the direct control of farm owners is 67000 hectares or an estimated 5% of the estate.

Can farm forestry provide what the export market needs?

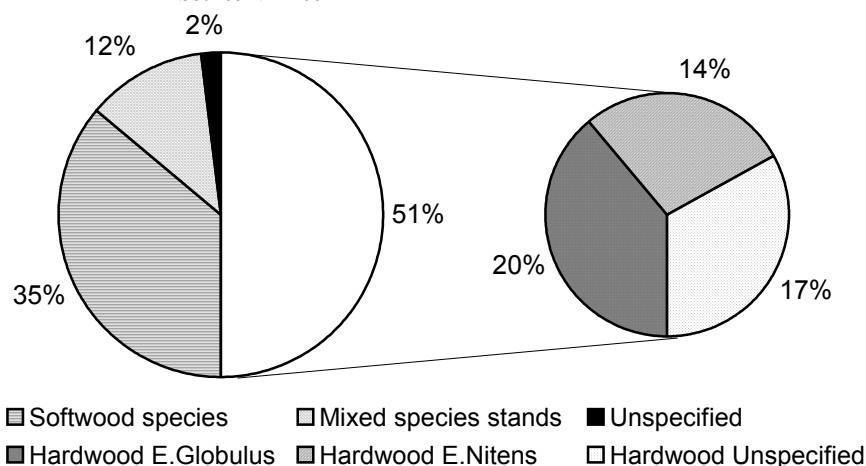
Industrial plantations aim to provide a uniform product and consistent supply. Achieving this has allowed Australian producers to supply markets for logs, pulp, wood chips and sawn timber in the major export markets of China and Japan. The majority of these industrial plantations are softwoods. In contrast the majority of small scale plantings are hardwoods as Figure 3 demonstrates. Most of the wood resource on small scale farms is associated with joint venture or lease arrangements, over 70% of identified small scale plantings are in this form.

The commercial joint venture and lease arrangements that industry and government have with private land owners in Australia usually have a specific use in mind so that pulp logs, woodchips or sawn lumber are the end product of lease or joint venture arrangements. These arrangements are concentrated in specific areas, such as

the North West Tasmania, the Green Triangle of South Australia and Victoria and South West Western Australia. The industrial processors not only limit their involvement to a specific climate area but also to specific species. Small grower plantations reflect this as well as Figure 3 also demonstrates. The species most dominant in hardwoods are identified and softwoods species are dominated by *p.radiata* planted in the 1970's and 1980's. Western Australia and Tasmania have the largest concentrations of hardwood plantations and Victoria and South Australia the largest softwood plantations. These areas have the greatest involvement of industry and government as well in the planting process. If industrial plantations are export oriented then small scale forestry supplying them can also be seen as growing for export requirements. The management, harvesting, transport and processing of the resource is handled by intermediaries such as the government or industry partner or less commonly in Australia a free market agent involved in the process.

Figure 3 Small Scale Forestry Planting Choices

Source NFI 2001



The ability of plantation sectors to export

Industry plantations on owned land have the greatest ability to be part of exporting and the global economy. Large companies with international distribution channels are most involved in this trade. This is not surprising as the economic decision to establish large mills is fundamentally based on a market for product. Processing plants for wood pulp, wood chips, MDF and sawn timber in Australia therefore have to look to markets outside Australia to remain economically viable.

The government encourages domestic processing and value adding for export income, and their support is evident in all forest areas around Australia. In order to maintain consistent supply, minimise acquisition costs and increase the area under plantation, joint ventures and leases have become more attractive to industry plantations. Because the ability of governments to supply leasehold land has diminished due to changes in approaches to crown land management, the industrial foresters have looked to private land owners to provide the area needed. Figure 1 indicates the globally integrated approach of industrial plantations and the contingent nature of the leased and joint venture arrangements in involvement in export. From the discussion above it is clear that the industrial processors have the land area, links with government and private land owners, uniform resource base, and command of value chains required for consistent export supply.

Table 2: Impediments to Small Scale exporters

Impediments	Export issues	Possible solutions
Supply uncertainty	Multiple planting rationales, small scattered woodlots, climate variability for small scale plantings, management variability	Industrial or cooperative lease and joint venture arrangements with export markets targeted,
Non Price issues	Variable quality, lack of recognised grade system for mixed species, no brand recognition	Development of uniform standards and accreditation, log standards established by AFFA
Lack of export experience	Compliance costs for solitary exporter are high	Education through cooperatives, trade tours, case study examples, eBusiness solutions
Lack of species recognition	Mixed species plantings for microclimate reasons, buyer uncertainty over material handling and processing	Regional timber cooperatives creating awareness such as the US Western Woods Association, eBusiness solutions
High Transport costs	distance to processors, to ports, road system, small	Industry alliances, agents and cooperative contracts to control costs
Need for government support	Entry into new markets, trade support with agents, insurance, banking and finance	Recognition of the small scale sector as worthy of trade support
Long intrastate distances	Proximity to processors, ports and getting appropriate land for accessible plantings	Higher value to volume products

Source: Cox and Quayle 2001

The area of plantation under the direct control of small scale owners in farm forestry is less than 5% of the national estate. Small scale farmers not associated with larger entities face a difficult task finding domestic markets for their product, let alone export markets. The farm forester faces many impediments to exporting identified in Table 2 above. However, in the globalised new economy the search costs for new markets and buyers are now markedly different and the logistics of transport movements makes it more feasible to secure and supply markets by identifying niche segments of value for high quality products. These factors of the new global economy can be used for the benefit of small scale forestry, just as its adoption has been successful in the Forest Products industry in the United States (Vlosky 1999). Research (Forrester 2001) indicates the nature of changes in transaction costs and the growth of eCommerce, predicting for example, that 8% of all sales will be online by 2004 in the Asia-Pacific region. The cost of transactions has reduced significantly with an average bank transaction dropping from between \$2.50 and \$3.50 down to \$0.12 due to eCommerce, (Twomey 1999) Considering that transaction costs amounted to nearly half the costs of the traditional economy the beneficial economics of the new globalised economy and the wider notion of eBusiness is self evident. In some respects the balance between large and small entities is changing in favour of small and medium business entities such as the farm forestry enterprise. This is to the potential benefit of small scale forestry.

Small scale farmers seeking export markets for low value forest products are restricted by the current industry structure to industry alliances for low value product and no direct export involvement. To be directly involved in the export market farm foresters need to target low volume high value product such as high grade saw logs with kiln drying, engineered wood products and non-timber products from their forest resource. Table 3 below, identifies possible small scale forestry output products and their export viability. Small scale forestry has the ability to grow more diverse timber quality species, differentiate its product in an export market, use eBusiness techniques to find and supply higher priced market segments and find markets from countries with sophisticated consumers looking for niche products. It is hopefully in this way they will have the ability to enter into a globalised market.

Export management issues for small scale forestry

The most probable export product choice for small scale forestry is high grade logs. Achieving a sufficient volume to make the sale economic and a willing buyer is the major hurdle for a single supplier. The solution that is most often proposed is the timber cooperative, or agent that can create enough combined volume to ensure a buyer and acceptable freight rates. It is often the choice made by the farmer who still sees wood and wood products as a sideline. There are many practical issues and some of them problems involved in the export process.

As an example the choice of product for export will involve different levels of commitment. The export of logs or sawn timber is the least problematical as flat pack containers or direct log exports are within the abilities of individual farm forestry enterprises if they are large enough. Alternative products such as engineered products or non wood product almost certainly means enlisting the help of a cooperative or association of similar export producers. This is because the capital costs for creating engineered wood products (eg; laminators, finger joint machinery, kiln drying equipment) is too great an investment for an individual farmer. It is also unlikely given the basis of planting decisions discussed earlier. An excellent example of this form of cooperation is the Osaka Lumber Industry development cooperative, visited in 1999 (Cox 2001) Here one example of appropriate scale economies is where lumber drying facilities for members ranged from solar drying facilities, wood waste fired kiln drying, oil and electric fan assisted kiln drying and fast microwave fan assisted kiln drying facilities. Each represents a graded increase in cost, control and speed of drying that allowed a measured response to any sales enquiry for lumber. If you wanted an order urgently then you paid a premium for it. This flexibility in response and prices is important to export markets and meeting buyer demands. It is a central issue in a global market economy as well.

Table 3: Possible small scale output products and export viability

Alternative small scale outputs	Representative Product options	Export viability
Pulp fibre	Pulp , MDF, OSB	Mainly industrial processors have the volume of supply and value chain links for these lower value wood products to be successfully exported.
Small Round Log (first thinning)	Pulp wood, domestic market stakes,	
Medium Round Log (second thinning)	pulp wood, poles, fencing, firewood	
Low Grade Saw Log (not kiln dried)	pulp wood, firewood, poles and posts	For farm forestry these products are limited to domestic markets due to their low value added nature.
High Grade Saw Log (for kiln drying)	veneer output, flooring, lumber	Small scale export potential with the use of timber cooperatives and agents
Engineered Products	finger jointed short clears, laminated beams and panels	
Non-Timber Products	honey, native oils, woodturning craft items, bush medicines, perfumes, flowers	

The American forest products industry has seen a rapid expansion in the use of eBusiness for logistics, marketing and sales. Various authors (Pitis 2000), (Smith 2002), (Shook 2002), (Vlosky 2002). have identified the growth and use of eBusiness in the American market. Small scale forestry can make use of the lessons learned in the American market and the central place the commercial use of the internet has in its adoption. There has been a rapid growth of electronic wood markets such as Western Woods Association, Woodlist in the USA, World Wide Wood and Stick Trader in Washington USA Woodnet in New Zealand in Europe there are many sites emerging such as Kullik and Rullmann, in Tasmania, Australia the Farmwood site is a good example of what can be done. These illustrate the potential to join buyers and sellers, provide information on species and an interactive buying experience for the consumer. For small scale forestry a web cam in the woodlot is not such a bad idea as a marketing tool.

Table 4: Checklist of items for Small Scale forestry exporters

Export criteria	Issues for small scale forestry
Product Management issues	Harvesting size and timing with orders, access roads, tally sheets, storage methods, value adding options such as kiln drying and further potential processing, grading system for logs and commodities such as laminated panels, non wood product may have specific requirements, use of agents
Market Assessment and Awareness	An up to date price list of targeted markets (eg; use of ITTO, JLJ) to assess product competitiveness best done through a cooperative group to agree on market and product, support from government trade departments, ability to supply must be assessed, Use of eMarkets for contacting buyers and demonstrating product
Logistics	Distance to port, port handling charges, Freight costs, container choice (20' or 40'), Flat pack, open or break bulk. freight tracking, time of ship, distance to port, optional use of third party logistics providers, handling and packaging issues, insurance
Legal Issues	Contract format, Vienna Sales Convention basis for dispute jurisdiction, shipping charges agreed, terms of payment and costs such as CIF, FOB C&F, agreed measurement criteria if logs are exported
Export documentation	Export licences for logs are sometimes required, freight insurance, Phytosanitary certificates depending on destination, bills of lading, Log grades
Payment issues	use of eCommerce to reduce costs, Letter of Credit for traditional transactions of large value, Bank guarantees , agreed terms of exchange

Conclusion

There is no doubt the size of the Australian national forest estate influenced by small scale farmers will continue to grow, even if it is more likely to be through industrial arrangements. This view is supported by its dramatic growth since the 1980's, the organisation of tree grower marketing co-operatives and government funded regional plantation committees that show a commitment to the future of this sector. A bright prospect is that emergent markets in environmental services are also well suited to the involvement of the small scale forestry estate. Because of the infancy of the industry much of the sectors' focus has been production oriented up to this time, as the right species, industry links and growing regimes are investigated and determined for the emergent industry and its range of climate and soil types. What should be recognised for the sector to mature and be part of a trade economy is a more uniform regional approach to the creation of export products from farm forestry and their marketing to potential buyers. Examining the potential for centralised collection, handling, kiln drying and processing facilities for regional cooperatives would be a useful next step in the research of export capabilities of the small scale sector. In addition, the penetration rate of eBusiness techniques in farm forestry will be an area of great interest

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Web based resources

Australia's Forest and Timber Industries – Resource and Opportunity (pdf) see, <http://www.affa.gov.au/content/output.cfm?ObjectID=63DA9CC6-1FDE-4FCC-9B8DC2CAF4833A42> accessed June 10, 2002.

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North West Farm Forestry Survey- October 2000 (pdf) see, <http://www.privateforests.tas.gov.au> accessed June 10, 2002

Sample wood exchange internet sites

Western Woods Association in the USA at <http://www.wwpa.org/techguide/grades.htm> ,

Woodlist in the USA at <http://e-wood.com/> ,

World Wide Wood in Washington USA at <http://www.wwwood.net/AboutUsHome.pf>

Stick Trader <http://www.sticktrade.com/about.html>

Woodnet in New Zealand at <http://www.woodnet.co.nz/msgboard/messages.asp>

Kullik and Rullmann at <http://www.kullikrullmann.de/index.html> ;

Farmwood in Tasmania, Australia <http://www.farmwood.com.au/> .