

# Developing a Target Market for Hardwood Lumber:

## Results of a Woodworker Survey



## Foreword

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In recent years, specialists with The University of Tennessee's Institute of Agriculture have investigated and evaluated opportunities for processing, packaging and marketing various areas of Tennessee's forest products industry. Advances in sawmill technology, development of integrated systems management from the woodlot to retail sales, product labeling and identifying niche markets for specialty lumber cuts and wood species are among a few of the considerations facing Tennessee's wood products industry.

One of the most limiting factors to value-added agricultural enterprise success concerns the evaluation and development of markets. This applies to value-added forest industries as well. A great deal of market planning should be done for wood product enterprises that are considering tapping into market opportunities for specialty wood products, such as particular species, cuts and packaging.

To evaluate potential market opportunities and buyer preferences related to specialty wood products, a survey of hobby woodworkers and craftpersons was developed through a multi-state cooperative effort. In spring 2000, a team of cooperating representatives from the Agricultural Development Center and the Sustainable Mountain Agriculture Center (SMAC) in Berea, Kentucky developed a proposal to the Southern Sustainable Agriculture Research and Education (SARE) Producer Grant Program. The producer grant was funded by SARE over a two-year period and included a survey of hobby woodworkers and craftpersons in the Southeast region of the country. The questionnaire for the survey was developed and implemented in spring 2001. Results of the survey were summarized in winter 2002 and are presented here for use in the evaluation and development of value-added wood products enterprises.

Appreciation is extended to Michael Best (cooperating producer and Executive Director of SMAC); Kent Wolfe (Marketing Specialist with the University of Georgia's Center for Agribusiness and Economic Development); Shasta Hubbs (Marketing Specialist with the ADC) Ray Humberd (UT Agricultural Extension Associate Dean Emeritus); Dan McLemore (Agricultural Economics Department Head and Acting Director of the ADC); Kim Stallings, (Graphic Designer) and the four anonymous peer reviewers.

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# Developing a Target Market for Hardwood Lumber: Results of a Woodworker Survey

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## Introduction

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Understanding the preferences and buying habits of potential buyers is essential in the development and evaluation of markets for value-added wood product enterprises. Surveying various woodworkers to determine their lumber usage, buying preferences, preferred delivery method and most effective methods of communication can help enhance the effectiveness of marketing plans of lumber producers and lumber sellers. Survey participants were identified through a variety of sources, including woodworker guilds, associations and related organizations in the Southeast.

## Survey Methods and Responses

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The questionnaires used in the survey were developed through the cooperative efforts of representatives from the Sustainable Mountain Agriculture Center (SMAC) and the *Agricultural Development Center (ADC)*. The survey was administered by mail and in-person to individuals identified as woodworkers. Table 1 provides detailed information about the survey sample and response.



**Table 1: Survey Sample and Response Information**

Survey Group	Sample Size	Surveys Returned	Usable Surveys	Response Rate
Southern Highlands Handicraft Guild	125	17	8	
East Tennessee Woodworkers Guild	20	17	16	
Cabinetmakers, furniture makers, contractors and wholesalers in the Southern Appalachian region	225	16	16	
<b>Total</b>	370	50	40	10.8 percent

Initially, 125 surveys were mailed to the Southern Highlands Handicraft Guild members, with 17 responding. However, only eight surveys were completed to the extent that they were deemed usable. The survey was also distributed to 20 members of the East Tennessee Woodworkers Guild in Spring 2001. These members contributed 16 additional usable surveys. The final mailing was done in October to 225 woodworkers (cabinet makers, furniture makers, contractors and wholesalers) in the Southern Appalachian region. This effort produced 16 additional usable surveys. The response rate was almost 11 percent.

The goal of the survey was to obtain approximately 200 responses. By collecting only 40 complete surveys, the study fell short of the goal. While the low response rate may not provide a statistically significant representation of the market, the results may provide useful insight for value-added entrepreneurs wanting to target this market. The mailing list for the study was obtained from compiling names gathered from groups such as guilds, associations and clubs, and the Real Yellow Pages®. These results provide interesting information but, as with many small-sample studies, are not intended to provide statistically significant conclusions of the overall market situation. It is helpful to note that no response bias was observed while summarizing the data. However, the overall low response rate indicates the need for caution in generalizing the data to the entire woodworking population.

### **Overall Analysis of the Survey Data**

Participants in the survey have been segmented into categories based on their business type – craftsman, hobby woodworker, cabinet maker or furniture maker. Detailed segment results are presented later in this publication. A summary of the results from all respondents, regardless of wood user segment, is presented on the following pages.



- An average of 1,375 board feet of green lumber is purchased annually per respondent.
- An average of 11,713 board feet of kiln-dried lumber is purchased annually per respondent.
- The most-often purchased species of wood are:

- 1) Oak
- 2) Pine
- 3) Poplar
- 4) Cherry
- 5) Maple
- 6) Cedar
- 7) Walnut
- 8) Hickory
- 9) Mahogany



- The average, single-event, green lumber purchase is 651 board feet.
- The average, single-event, kiln-dried lumber purchase is 569 board feet.
- Delivery of purchased lumber does not seem to be a mandatory requirement by wood users, with only 37 percent requiring that delivery be provided.
- The respondents did not expect to pay a lower price for lumber purchases at a small mill than for lumber at a large mill (even if the smaller mill could supply only a partial amount of their one-time lumber demand/needs).
- Seventy-nine percent of the respondents indicated they prefer dealing directly with a sawmill operator/owner rather than a wholesaler. This preference, however, is not distinguished for green and dried lumber.
- A small number of respondents indicated an interest in “special services” that a sawmill might provide – eight mentioned “specialty cuts,” six mentioned “re-saw,” three mentioned “straight edge,” one mentioned “keeping boards together from a log,” one mentioned “planed,” one mentioned “short cuts” and one mentioned “save logs for turners.”
- Eighty-three percent of respondents indicated “word-of-mouth” was how they found their current supplier of lumber products. Only three respondents indicated they found their supplier through advertisements in an “industry magazine” and/or “newspaper.”
- Respondents indicated that the following were products small sawmill operations might be able to supply at a cost advantage over larger operations:
  - 1) lesser-known species
  - 2) thin stock (for drawers and specific uses)
  - 3) turning squares
  - 4) special size cuts, thickness
  - 5) wood from certified forests/mills using Forest Stewardship Council (FSC) guidelines
  - 6) small quantities of high-grade lumber
  - 7) quarter-sawn lumber, especially white oak
  - 8) figured lumber, crotches, burls<sup>1</sup>

<sup>1</sup>Figured lumber is lumber that contains some type of “figure” caused by various grain orientations in the wood. Examples would be birds-eye maple, tiger-striped maple, quarter-sawn lumber, etc. The grain configurations are pleasing to the eye, more rare and highly sought after by custom woodworkers. Most producers do not focus on cutting specifically for figure because generally they are focused on production, and it is often difficult to determine if a specific figure will be present in a log. Burls and crotches have unusual grain orientations that produce a unique figure that is highly prized and expensive. The figure from burls is usually used in veneer products. Burlled walnut is also often found in expensive gunstocks and bowls. Crotches of trees are located where a tree’s main stem is split into two main branches, resulting in a unique figure. One problem of focusing on this specific product type is the difficulty in obtaining a consistent raw material supply and finding the market. Individuals willing to pay for these products are normally scattered across the country, thus making it difficult to target them efficiently.

- 9) mantle lumber
- 10) custom size for siding and interior trim
- 11) complete logs (keeping boards together from a log)

- A majority of respondents (68 percent) do not currently use the Internet to search for lumber products. However, 35 percent of those who currently do not use the Internet for products indicated they would purchase lumber materials via the Internet if they could purchase what they need.
- A vast majority of the respondents (94 percent) indicated that their business was located less than 50 miles from the nearest lumber market, with only 3 percent indicating the nearest market was more than 100 miles away from their business. This indicates a relatively limited market area (less than 50 miles).
- Forty-two percent of respondents indicated that a lumber market was located within 10 miles of their business, while 89 percent indicated traveling less than 100 miles to purchase their lumber and 75 percent drive less than 50 miles.
- There seems to be a willingness by those who currently drive less than 10 miles to buy lumber (31 percent) to increase their travel distance to 50 miles if they could purchase their lumber supplies from a small producer (the percent of people who would drive 11 to 50 miles goes from 44 percent to 62 percent, while at the same time the number of people who currently drive 10 or fewer miles goes from 31 percent down to 9 percent when asked about purchasing from a small producer).
- Respondents do not seem interested in operating their own sawmill or dry-kiln facility, with 84 percent not interested in operating a sawmill and 76 percent not interested in operating a dry kiln. This indicates, however, slightly more interest in operating a dry kiln than a sawmill.

### Sample Characteristics:

- 98 percent of the respondents were male.
- The average age of the respondents was 52 years.
- The average number of years each respondent had been in the woodworking business/hobby was 23.
- Although some respondents indicated more than one primary wood working occupation, of those who reported only one:
  - 27 percent indicated "furniture maker" best described their current woodworker position.
  - 23 percent indicated that "craftsperson" best described their current woodworker position.
  - 20 percent indicated that "cabinetmaker" best described their current woodworker position.
  - 13 percent indicated that "hobbyist" best described their current woodworker position.
  - 10 percent indicated that "other" best described their current woodworker position.
  - 9 percent indicated that "contractor" best described their current woodworker position.
- The average annual gross income from each respondent's woodworking enterprise is \$160,038, which is significantly influenced by the average annual gross income reported in the cabinet-maker segment (\$600,000).



## Analysis of Data by Wood-User Segment

Segmenting the respondents by their primary woodworking occupation (craftsperson, hobby woodworker, cabinetmaker or furniture maker) provides greater insight into buying patterns and preferences. The survey results have been analyzed by the following four segments:

- craftsperson
- hobby woodworker
- cabinetmaker
- furniture maker



Looking at the results of each wood-user segment provides insight into the market that could help wood suppliers target individual segments separately. The number of respondents in each of the wood user segments is presented in Table 2 and does not include multiple responses.

**Table 2: Number of Respondents in Each of the Wood-User Segments**

Primary Wood-use Occupation	Number of Respondents
Craftsperson	7
Hobby Woodworker	4
Cabinetmaker	6
Furniture Maker	8

## Craftspeople



The “craftsperson” segment purchased more green lumber than kiln-dried lumber annually. Each craftsperson purchased an average of 416 board feet of green lumber and 250 board feet of kiln-dried lumber.

Craftspeople indicated that they use more cherry than other wood species, followed by oak.

The craftspeople spend an average of \$500 (an average of 288 board feet) for each green lumber purchase and an average of \$367 (an average of 133 board feet) for each kiln-dried lumber purchase. Half of the craftspeople respondents say that they require delivery of their lumber purchases. A majority of the craftspeople (83 percent) say they would be willing to pay a small producer the same price per board foot as a larger producer, even for partial loads. All of the craftspeople indicated they would prefer to deal with a sawmill owner/operator rather than a wholesaler.

Eighty-three percent of the craftspeople indicated they do not currently use the Internet and 80 percent of these non-Internet users say they will not purchase materials over the Internet. This is important to know if you are interested in targeting craftspeople by using the Internet.

Sixty-seven percent of the craftspeople travel less than 50 miles to purchase their lumber, which is the same distance that they would be willing to drive to purchase from a small producer. None of the craftspeople said that they would be interested in owning a sawmill, but 17 percent have an interest in owning/operating a kiln.

Table 3 shows the various responses the craftspersons gave for lumber grades, sizes, species used and species difficult to find.

**Table 3: Lumber Grades Used, Lumber Sizes Preferred, Species Used and Species Difficult to Find by Craftspersons**

Grades Used	Sizes Preferred	Species Used	Species Difficult to Find
F.A.S. <sup>2</sup> Select	5/4 8/4 3/4	Cherry Oak Exotics	Curly Burly Mahogany Domestic Hardwoods

Eighty-six percent of the craftspeople were male and the average age of the craftsperson was 57. The craftsperson respondents reported an average of 26 years of experience and an average annual gross income from woodworking activities of \$38,100.

## Hobby Wood Users



The respondents who classified themselves as “hobby wood users” indicated that they purchase more kiln-dried lumber than green lumber annually. The hobby wood user purchases an average of 100 board feet of green lumber and 150 feet of kiln-dried lumber at one time and 200 board feet of green lumber and 575 board feet of kiln-dried lumber annually. Delivery is not particularly important to this group, although they did indicate that they would pay a small producer the same price for partial loads as they would pay a larger producer for a full load. All of the hobby wood users expressed a preference of buying lumber directly from producer-owned sawmill rather than a wholesaler.

Similar to the craftspeople, hobby wood users did not express an interest in using the Internet as a source of lumber and only 25 percent of them say that they would use the Internet in the future.

All of the hobby wood users indicated that they drive less than 50 miles to purchase their lumber and expressed no interest in driving any further. The average age of the hobby wood user is 66 with 36 years of experience. The hobby wood users group did not report any income derived from their wood enterprise.

<sup>2</sup> FAS is a standard grading term used to classify lumber as “Firsts and Seconds.”

Table 4 shows the various responses the hobby wood workers gave for lumber grades, sizes, species used and species difficult to find.

**Table 4: Lumber Grades Used, Lumber Sizes Preferred, Species Used and Species Difficult to Find by Hobby Wood User**

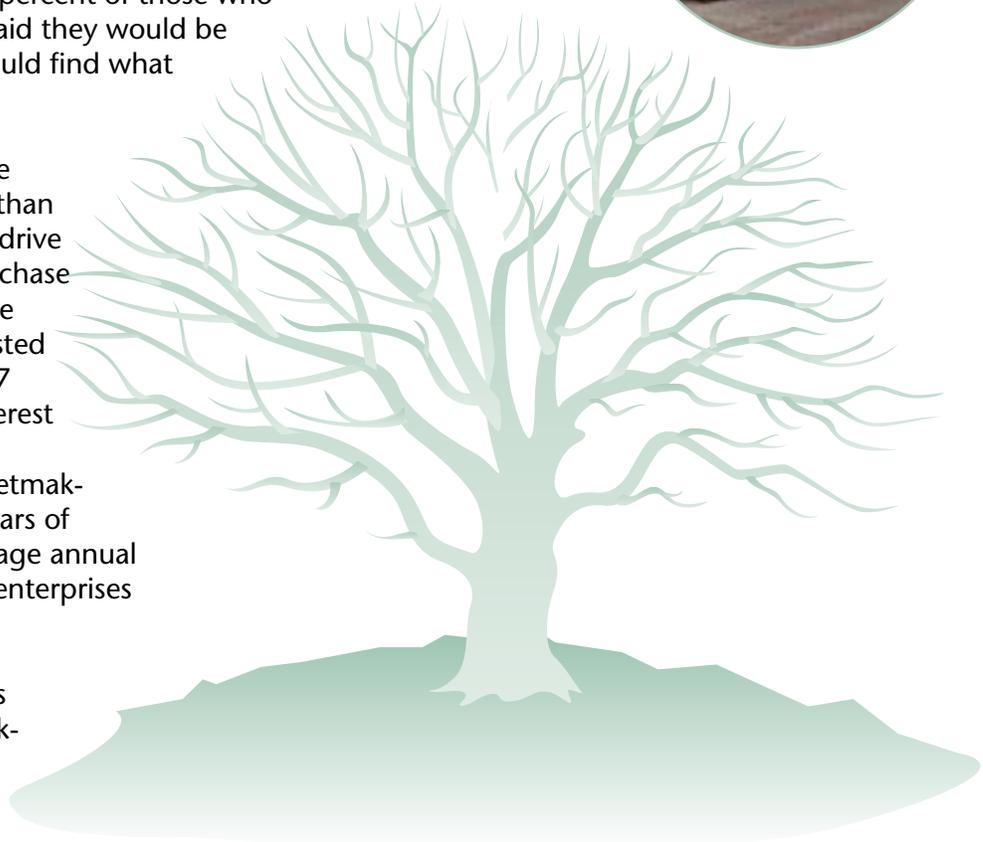
Grades Used	Sizes Preferred	Species Used	Species Difficult to Find
F.A.S. # 2	4/4	Poplar Cherry Pine Oak	Western Red Cedar

## Cabinet Makers

The “cabinetmakers” indicated that they purchase no green lumber. They purchase an average of 1,550 board feet of dried lumber at a single purchase and 47,167 board feet of dried lumber annually. Eighty-three percent of the cabinetmakers said that they require delivery and would pay the same price for partial loads from a small processor as they would pay for full loads from a wholesaler. Forty percent of the cabinetmakers said they would rather deal with a producer than a wholesaler. About one-half of the cabinetmakers use the Internet to purchase lumber products and 66 percent of those who do not use the Internet said they would be willing to use it if they could find what they need.

Sixty-seven percent of the cabinetmakers drive less than 50 miles and 84 percent drive less than 100 miles to purchase lumber. While none of the cabinetmakers are interested in operating a sawmill, 17 percent expressed an interest in owning a dry kiln. The average age of the cabinetmakers is 42 years with 18 years of experience, and the average annual gross income from their enterprises is \$598,000.

Table 5 shows the various responses the cabinetmakers gave for lumber grades, sizes, species used and species difficult to find.



**Table 5: Lumber Grades Used, Lumber Sizes Preferred, Species Used and Species Difficult to Find by Craftspersons**

Grades Used	Sizes Preferred	Species Used	Species Difficult to Find
F.A.S. Select and Better	4/4 13/16	Oak Maple Cherry Poplar Pine Hickory Mahogany	None



### Furniture Makers

The “furniture makers” purchase an average of 638 board feet of green and 733 board feet of dry lumber annually. Fourteen percent of the furniture makers require delivery of their lumber purchases and all respondents expressed a willingness to pay the same price for partial loads from a small producer as full loads from a wholesaler. Half of the furniture makers indicated they currently use the Internet to shop for lumber supplies and 34 percent of those who do not use the Internet indicated they would use it if they could find what they need.

Seventy-five percent of the furniture makers drive less than 50 miles to purchase their lumber products and all indicated that they would drive up to 100 miles to purchase from a small producer. The average age of the furniture maker is 48 years with 18 years of experience, and an average annual gross income from their wood-working enterprise of \$39,400.

Table 6 shows the various responses the furniture makers gave for lumber grades, sizes, species used and species difficult to find.

**Table 6: Lumber Grades Used, Lumber Sizes Preferred, Species Used and Species Difficult to Find by Furniture Makers**

Grades Used	Sizes Preferred	Species Used	Species Difficult to Find
F.A.S. Select and Better Furniture Grade	3x4 4x4 8x4 12x4 16x4	Poplar Maple Cherry Oak Walnut Tropical White Pine	White Pine Figured Maple Wide stock

## Who Is the Target Market?

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According to the survey, 98 percent of woodworkers are male, the average age is 52 years and the average number of years in the woodworking business is 23. Most woodworkers are furniture makers, cabinetmakers, craftspeople and hobby woodworkers grossing an average of \$160,038 annually from their woodworking enterprise. On average, they purchase 1,375 board feet of green lumber and 11,713 board feet of dried lumber annually. A slight majority of them do not require delivery but they prefer to deal with a small sawmill owner/operator rather than a wholesaler. Overall, they do not have many custom-specific product or service desires. They rely heavily on word-of-mouth communications to find suppliers and only one in three uses the Internet to find lumber suppliers. They travel less than 100 miles to purchase lumber (most drive less than 50 miles) and they are generally not interested in operating their own sawmill or dry kiln.

## Summary of Market Opportunities

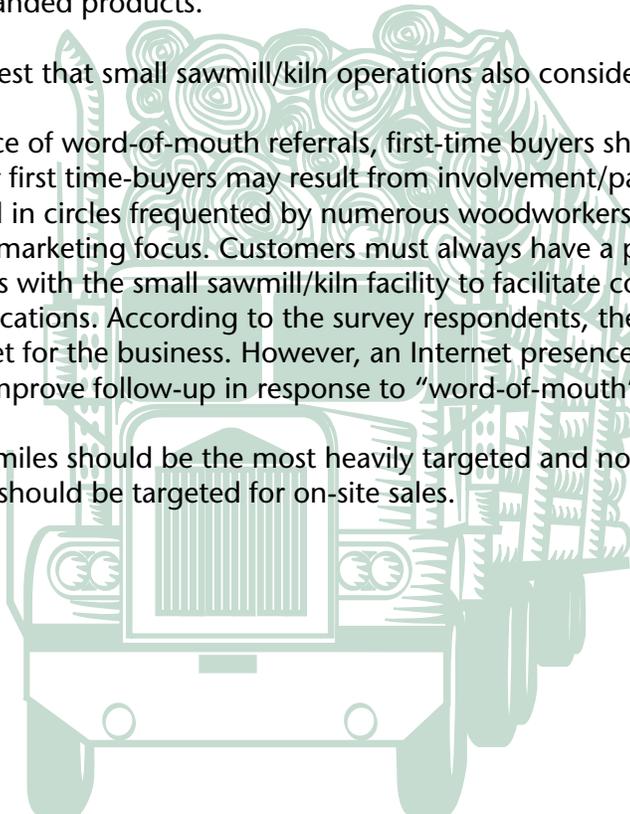
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The results of this survey indicate that small sawmill/kiln operations may have a competitive advantage for providing and promoting the following:

- Certified wood, specialty and hard-to-find species (examples might include Osage Orange, Sassafras, Sycamore, Elm and Beech).
- Other products and services such as lesser-known species, thin stock (for drawers and specific uses), turning squares, special-size cuts, thickness, certified wood using FSC guidelines, small quantities of high-grade lumber and quarter-sawn white oak.
- The “small, owner-operated sawmill” benefits, because most respondents prefer to deal with a sawmill owner-operator rather than a wholesaler.
- Novelty products and branded products.

In addition, the results suggest that small sawmill/kiln operations also consider the following:

- Because of the importance of word-of-mouth referrals, first-time buyers should be targeted by the business. Contacts for first-time-buyers may result from involvement/participation in various woodworking groups and in circles frequented by numerous woodworkers. In addition, customer service should be a main marketing focus. Customers must always have a positive experience while conducting business with the small sawmill/kiln facility to facilitate continuous positive word-of-mouth communications. According to the survey respondents, the Internet should not be a primary market outlet for the business. However, an Internet presence may be helpful to enhance credibility and improve follow-up in response to “word-of-mouth” publicity
- Woodworkers within 50 miles should be the most heavily targeted and no one more than 100 miles from the operation should be targeted for on-site sales.



## APPENDIX A

### Cover Letter Sent with Survey

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November 6, 2001

Dear \_\_\_\_\_,

As a consumer of hardwood lumber products in this region we need your help. Our non-profit organization, the Sustainable Mountain Agriculture Center is involved in a research project with the University of Tennessee's Agriculture Development Center in Knoxville. We are surveying craftspeople, cabinetmakers, furniture makers, housing contractors and others that use hardwood lumber products in an attempt to determine marketing strategies for small woodlot/portable sawmill owners in the Southeast. We are hoping to find economically viable ways to add value to the hardwood timber that is so abundant in this region, before it leaves the farm, thus giving farmers another cash crop to sustain their farming operations.

We hope you will take the 10 to 20 minutes needed to fill out this survey. The information you provide us will remain confidential and will only be reported in summary form so that no individual business information will be seen. The strategies generated from the information provided by these surveys will be used to help small farmers market their timber products using more direct methods.

This project is being funded by the Sustainable Agriculture Research and Education program (a USDA program). If you would like to see the results of our survey, please send us your name and address when you return the survey. If you would like to see more information about our organization, please visit our web site at [www.heirlooms.org](http://www.heirlooms.org).

Thank you very much for your time.

Michael Best, Executive Director and Agricultural Economist  
Sustainable Mountain Agriculture Center, Inc.

## APPENDIX B Processor/Craftsperson Survey

Thank you for taking the time to fill out this survey. The results of this survey will be used to develop a marketing strategy for the small wood producer. This research project is being funded by the Sustainable Agriculture Research and Education Program (part of USDA).

The results will be posted on the Sustainable Mountain Agriculture Center's Internet homepage ([www.heirlooms.org](http://www.heirlooms.org)). If you wish to receive a copy of the results by mail please send us a note with your address and we will gladly do so. All individual results will be kept confidential and these surveys are anonymous. We ask for demographic data to help us verify that we got a good cross-section of the population to fill out these surveys. Please return your completed survey in the self-addressed stamped envelope enclosed.

Thanks again,

Michael J. Best  
Executive Director and Agricultural Economist  
Sustainable Mountain Agriculture Center, Inc.

1. In board feet, how much green and or kiln dried lumber do you purchase in an average year and your total cost for each type?

Green \_\_\_\_\_ Bd. Ft.  
\$ \_\_\_\_\_  
Kiln dried \_\_\_\_\_ Bd. Ft.  
\$ \_\_\_\_\_

2. What is the percentage of different species of wood, thickness (size), and grade that you purchase in an average year?

<u>Species</u>	<u>Size</u>	<u>Grade</u>
Oak _____ %	_____ in	_____
Maple _____ %	_____ in	_____
Poplar _____ %	_____ in	_____
Cherry _____ %	_____ in	_____
Pine _____ %	_____ in	_____
Cedar _____ %	_____ in	_____
Other (Please Specify)	_____ %	_____ in
	_____ %	_____ in

3. What is your average lumber purchase in board feet (at one time)?

Green \_\_\_\_\_ Bd. Ft.  
\$ \_\_\_\_\_  
Dry \_\_\_\_\_ Bd. Ft.  
\$ \_\_\_\_\_

4. Are there any species or dimensions of lumber that are difficult for you to find? If so, please specify the most difficult species and dimensions below. (i.e. legstock)  
Species \_\_\_\_\_  
Dimension \_\_\_\_\_

5. As a craftsperson/ processor, is delivery of the kiln-dried lumber to your business optional or mandatory?

6. Would you be willing to pay a smaller producer the same price per board foot even if they could only supply a partial amount of what you demand at a time?

7. Would you prefer dealing with a wholesaler or sawmill owner/ operator (producer) for your lumber purchases?  
Wholesaler \_\_\_\_\_  
Producer \_\_\_\_\_

8. Are there any products that you know of that small sawmill owners might have a cost advantage in producing due their size?

9. Are there any services you would like a sawmill to provide that you are not currently being offered?

- Re-saw \_\_\_\_\_
- Straight edge \_\_\_\_\_
- Specialty cut \_\_\_\_\_
- Other \_\_\_\_\_

10. How did you find out about the producer/wholesaler where you currently purchase your lumber products?

- Industry Magazine \_\_\_\_\_
- Newspaper \_\_\_\_\_
- Radio \_\_\_\_\_
- TV \_\_\_\_\_
- Word-of-Mouth \_\_\_\_\_
- Other (please specify) \_\_\_\_\_

11. Do you currently use the Internet to search for and purchase lumber products online?

- Yes \_\_\_\_\_
  - No \_\_\_\_\_
- (If yes, skip to question 13)

12. Would you purchase lumber materials using the Internet if you could find what you needed there?

- Yes \_\_\_\_\_
- No \_\_\_\_\_

13. How close is the nearest lumber market to your work site?

- Less than 10 miles \_\_\_\_\_
- 11-50 miles \_\_\_\_\_
- 51-100 miles \_\_\_\_\_
- over 100 miles \_\_\_\_\_

14. How far do you travel to purchase your lumber?

- Less than 10 miles \_\_\_\_\_
- 11-50 miles \_\_\_\_\_
- 51-100 miles \_\_\_\_\_
- over 100 miles \_\_\_\_\_

15. How far would you be willing to travel to buy lumber from a small farmer?

- Less than 10 miles \_\_\_\_\_
- 11-50 miles \_\_\_\_\_
- 51-100 miles \_\_\_\_\_
- over 100 miles \_\_\_\_\_

16. If feasible, would you be interested in operating a small sawmill or dry kiln?

- |                 |
|-----------------|
| <b>Sawmill</b>  |
| Yes _____       |
| No _____        |
| <b>Dry Kiln</b> |
| Yes _____       |
| No _____        |

### Demographics (Optional)

1. What is your gender?

- Male \_\_\_\_\_
- Female \_\_\_\_\_

2. What is your age? \_\_\_\_\_

3. How many years have you been in this profession? \_\_\_\_\_

4. What is your current occupation?

- Wholesaler/consolidator \_\_\_\_\_
- Craftsperson \_\_\_\_\_
- Hobby wood user \_\_\_\_\_
- Cabinetmaker \_\_\_\_\_
- Furniture maker \_\_\_\_\_
- Contractor \_\_\_\_\_
- Other, please specify \_\_\_\_\_

5. On average, what is your annual gross income from woodworking or processing? \$ \_\_\_\_\_

6. What is your zip code? \_\_\_\_\_

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COOPERATIVE EXTENSION WORK IN AGRICULTURE AND HOME ECONOMICS

The University of Tennessee Institute of Agriculture, U. S. Department of  
Agriculture, and county governments cooperating in furtherance of Acts of May 8 and June 30, 1914.

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