

University of Missouri
Center for Agroforestry

Red Cedar Market Research
2007

INFORMED CONSENT

PROJECT BACKGROUND: This mail survey involves research on the red cedar market. This study updates previous research performed in 2003 on the national red cedar market. The objective of this study is to further develop our understanding of the red cedar market (who are the participants in the market, what kind of products are currently being marketed, and what are the general trends for supply and demand). The information obtained will be summarized and may be published. You must be at least 18 years of age to participate.

PURPOSE: The purpose of this mail survey is to obtain an understanding of the red cedar market and market forces in the benefit of all market participants.

VOLUNTARY: This mail survey is entirely voluntary. You are not required to participate and you may refuse to answer any question.

WHAT DO YOU DO? The survey consists of a series of questions about your company, suppliers, buyers and competitors in the red cedar market. The mail survey should take about 7 minutes to complete.

BENEFITS: Your responses to this mail survey will enhance our understanding of the red cedar marketplace and the forces that impact this market. It will be of great value in helping the researchers to complete a final market analysis and make recommendations that will help businesses and individuals in the market better understand their markets, develop new relationships and take further actions for the collective benefit of the red cedar industry.

RISKS: This project does not involve any risks greater than those encountered in daily life; it is intended to help better understand the red cedar market to the collective benefit of all individuals who work in this industry.

CONFIDENTIALITY: Your confidentiality will be maintained in that any results obtained from the mail survey will consist only of summarized information. The identities of all individual participants will be kept anonymous.

QUESTIONS:

If you have any questions regarding the study, please contact Dr. Michael Gold Principal Investigator at (573) 884-1448. If you have questions regarding your rights as a participant in research, please feel free to contact the University of Missouri Campus Institutional Review Board at (573) 882-9585.

1. **Describe your position in the eastern red cedar market** (check all that apply):

| | |
|---|--|
| <input type="checkbox"/> Landowner <input type="checkbox"/> Logger <input type="checkbox"/> Lay down mill <input type="checkbox"/> Primary manufacturer <input type="checkbox"/> Secondary manufacturer | <input type="checkbox"/> Fiber industry (pet bedding, mulch and shavings) <input type="checkbox"/> Essential oil producer <input type="checkbox"/> Retail outlet <input type="checkbox"/> Other |
|---|--|

2. **What is your approximate annual gross sales figure from eastern red cedar?**
 - Less than \$5,000
 - \$5,000 - \$25,000
 - \$25,000 - \$50,000
 - \$50,000 - \$100,000
 - \$100,000 - \$500,000
 - \$500,000 - \$1 mill.
 - \$1 mill. - \$5 mill.
 - More than \$5 mill.

3. **What percent does this represent from your total gross annual sales?**
 - Less than 10%
 - 10 - 25%
 - 25 - 50 %
 - 50 - 75 %
 - 75 - 100%
 - 100%

4. **What eastern red cedar raw material/products do you purchase to convert into your final products?**

5. **What did you spend last year for raw material (\$)?**

6. **What was the average quantity of material purchased last year?**

7. **What were your per unit costs for material purchased last year?** (\$/board feet or \$/cord or \$/cubic yard, etc) \$ /; \$ /; \$ /; \$ /

8. **Who are your primary suppliers of red cedar materials?** (Check all that apply).
 - Own supply
 - Landowner
 - Logger
 - Lay down mill
 - Primary manufacturer
 - Secondary manufacturer
 - Other

9. Is there enough eastern red cedar available on the market within your primary area (75 miles) to meet your needs in the next 5 years?

- Yes
- No

10. How would you describe the eastern red cedar input materials available through the supply channels?

| | | | |
|--------------|--|-----------------------------------|--|
| Availability | <input type="checkbox"/> Readily available | <input type="checkbox"/> Adequate | <input type="checkbox"/> Hard to obtain |
| Stability | <input type="checkbox"/> Stable supply | <input type="checkbox"/> Adequate | <input type="checkbox"/> Unstable supply |

11. How would you view the supply of input materials over the next 5 years?

| | Less than 10% | 10% - 25% | 25 - 50% | More than 50% |
|---|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Increasing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Remaining stable | | | | |
| <input type="checkbox"/> Decreasing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

12. Who are your primary buyers? (check all that apply)

- Lay down mill
- Primary manufacturer
- Secondary manufacturer
- Fiber industry
(pet bedding, mulch, shavings)
- Essential oil producer or distributor
- Retail outlet
- Other

13. Where, and for how much, do you sell your eastern red cedar products?

| Product | Market outlet | Price range (\$/unit) |
|---------|---------------|-----------------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

14. What percentage (how many) of your buyers would be considered:

End-users

Resellers

15. How would you describe your primary marketing area? What percentage does each represent? Please check all that apply.

- Local (within 75 miles radius) (%)
- Regional (between 75 and 200 miles radius) (%)
- National (%)

16. Please estimate the changes in demand for your eastern red cedar products in the past five years:

| | Less than 10% | 10% - 25% | 25 – 50% | More than 50% |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Increased | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Remained stable | | | | |
| <input type="checkbox"/> Decreased | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> I don't know/N.A. | | | | |

17. Please estimate the trends in demand for your eastern red cedar products in the next five years:

| | Less than 10% | 10% - 25% | 25 – 50% | More than 50% |
|--|--------------------------|--------------------------|--------------------------|--------------------------|
| <input type="checkbox"/> Increasing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> Remaining stable | | | | |
| <input type="checkbox"/> Decreasing | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| <input type="checkbox"/> I don't know/N.A. | | | | |

18. How many competitors do you have in your area (within 75 mile radius)?.....

19. Compared to other similar companies in your area, is your company...

- Smaller than average Average Larger than average I don't know

20. Where are you located? City, County, Zip code

21. Would you be willing to participate in a more detailed follow up of this survey which may be conducted by phone or in person?

- Yes
- No

Thank you very much for your time and effort!