

- two storeys with floor space of 1 000 m<sup>2</sup> and above; and
- single-storey building with floor space of 3 000 m<sup>2</sup> and above.

There are no interior finishing limitations for residential buildings other than that wooden wall panels may not be installed in kitchens.

## Moulding

### Market Overview

Mouldings are divided into several categories based on the locations where they are installed. For example, a moulding located where the ceiling intersects a wall is referred to as crown; moulding used where the floor intersects a wall is termed base/shoe; mouldings used in or on corners are respectively called inside cove and corner.

Typically, mouldings installed in Japanese homes are very simple in design and are not decoratively crafted. Typical sizes are listed in Table 19.

The mouldings commonly used in Japan are simple with only a little decorative work such as scrolling. It is believed that the use of mouldings in Japanese houses has been decreasing primarily due to decorative preferences and a decreasing number of single-family housing starts.

In high-rise residential buildings and in commercial and public buildings, moulding use is minimal. Furthermore, high-rise residential buildings and non-residential buildings mainly employ base mouldings manufactured from vinyl.

Lacking any formal statistics for the production and shipment of moulding, estimations were made based on the following premises:

- the average use of mouldings in residential buildings is estimated at 100 m for base mouldings per 120 m<sup>2</sup> of floor space and 150 m for other mouldings per 120 m<sup>2</sup> of floor space;
- moulding use in non-residential buildings is estimated at 80 m for base mouldings per 120 m<sup>2</sup> of floor space and 100 m for other mouldings per 120 m<sup>2</sup> of floor space; and
- use of decorative mouldings in non-residential buildings is less than that in residential buildings. In addition, mouldings in the non-residential buildings are primarily of vinyl.

Moulding-use estimates are presented in Table 22.

### Supply Trends

Most moulding production is conducted by plywood and building component manufacturers. The production level is steady and complies with building construction needs.

At present there are no significant factors affecting the supply of mouldings other than building starts.

### Imports

Mouldings are covered in fair detail in Japan's import statistics. However, the volume is indicated by weight in kilograms and not directly comparable with the figures shown in this study's market estimation. The import statistics for the classification "wooden beading, mouldings including moulded skirt and other moulded board" are presented in Table 23.

Table 22

Moulding Market Estimates (million m)

| Year | Base Moulding |             |       | Other Mouldings |             |       |
|------|---------------|-------------|-------|-----------------|-------------|-------|
|      | Commercial    | Residential | Total | Commercial      | Residential | Total |
| 1982 | 59            | 90          | 149   | 73              | 135         | 208   |
| 1983 | 60            | 82          | 142   | 75              | 124         | 199   |
| 1984 | 64            | 83          | 147   | 80              | 125         | 205   |
| 1985 | 64            | 85          | 149   | 80              | 129         | 209   |
| 1986 | 65            | 92          | 157   | 81              | 139         | 220   |
| 1987 | 70            | 110         | 180   | 87              | 166         | 253   |
| 1988 | 81            | 112         | 193   | 100             | 169         | 269   |
| 1989 | 79            | 109         | 188   | 98              | 164         | 262   |

Source: KF International.