

# Estimating the impact of foreign competition on the Wisconsin wood furniture industry.

## Part 2. A qualitative analysis

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### Abstract

The State of Wisconsin is losing manufacturing employment in the non-upholstered wood household furniture industry due to foreign competition. By interviewing furniture companies in the State of Wisconsin, and by using qualitative information gained through these interviews, opinions as to the status of the current industry were gathered. Results of the interviews substantiated previously suggested means for company survival and further expressed the insights and opinions of industry representatives.

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According to the Bureau of Labor Statistics, 18 percent of employment in the State of Wisconsin is in manufacturing. Only the State of Indiana ranks higher in manufacturing employment in the United States (WIDC 2004). However, from the first quarter of 2000 through the third quarter of 2003, Wisconsin's manufacturing employment declined by 86,000 jobs or approximately 14.4 percent (WDR 2003). The Wisconsin companies manufacturing furniture, and many of their counterparts across the country, are losing ground in the global market. In the United States, the wood furniture industry has lost 34,700 workers since 2000 (Buehlmann et al. 2003). This loss is driven by an influx of foreign-made products that are priced well below products made domestically (Nwagbara et al. 2002, Aeppel 2003, Anonymous 2004a).

Within the furniture industry itself, there are differing opinions as to the cause of and solution to the problem of foreign competition. Some U.S. companies have begun using overseas manufacturing to remain competitive in pricing. Other companies have urged the government to pursue an "anti-dumping" policy against countries exporting goods to the United States (Lorimor 2003). Specifically, on January 9, 2004, the International Trade Commission decided unanimously that Chinese manufacturers were illegally dumping furniture in the American market. A June 18, 2004, prelimi-

nary decision determined that tariffs ranging from 4.9 to 198.08 percent should be imposed on the manufacturers exporting to the United States at prices below cost (Anonymous 2004b). The average tariff rate imposed was decreased late in 2004 (Anonymous 2005). This tariff, however, only applies to bedroom furniture.

Overall, manufacturing in the United States will never be the same because of the changes due to globalization (Evans 2003). Specifically, impacts of foreign competition have caused the industries in Wisconsin to either change their business focus or contemplate losing their businesses entirely. This is especially true in the value-added wood products industry, which includes the wood furniture industry. What impact does the loss of jobs have on the Wisconsin economy as a whole? By addressing these questions and by estimating impacts, a better understanding of the significance of the furniture industry's contribution to Wisconsin's economy can be gained and policy alterations can be implemented to assist companies in jeopardy of closure.

### Objective

The major objective of this study was to determine the perceived impact of foreign competition on Wisconsin's non-upholstered wood household furniture industry.

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## Methodology

### Study population and sample

The study objective was satisfied by interviewing furniture manufacturers to gauge their impressions of foreign competition in the industry, and more importantly, their perception of the impact of foreign competition on their specific business. Through the use of a qualitative questionnaire, viewpoints from individual firms could be gathered. As mentioned by Bumgardner et al. (2000), qualitative results in this study enabled a more in-depth review of the firms' opinions than would a quantitative analysis. Bumgardner et al. also noted "a growing trend in social and behavioral science methodology that places less emphasis on numbers and more emphasis on observation and asking people questions."

The Wisconsin Secondary Wood Using Industry Database (Bowe and Mace 2004), compiled jointly by the University of Wisconsin, Department of Forest Ecology and Management and the Wisconsin Department of Natural Resources, Division of Forestry, and the 2004 Wisconsin Manufacturers Directory (Carlsen 2004) were used to identify companies involved in the non-upholstered wood household furniture industry in Wisconsin. The secondary database includes 972 Wisconsin companies that identify themselves as secondary wood processors. The database allows users to conduct a search by specific information about the company such as the type of wood used in processing, the number of workers employed, and the type of product manufactured. The study subjects were separated into two groups: small wood products companies and large wood products companies. Past studies of the forest products industry have defined 20 as the employee level at which a wood products company is considered large (Hansen and Smith 1997, Bowe et al. 2001). Additionally, data supplied through the Secondary Directory and the Wisconsin Manufacturers Directory suggested that, although 81 percent of Wisconsin's wood household furniture manufacturers employ 19 or fewer employees, 93 percent of employees in the State of Wisconsin's wood household furniture industry are employed in companies with 20 or more employees. Six of these companies employ 100 or more employees.

The initial search in the Secondary Directory was limited to companies with 20 or more employees. The resulting list of companies was then further limited to those companies that manufacture wood household furniture. This list included companies that list wood household furniture as the only product sold and companies that specify wood household furniture as one of many products sold. The resulting list included 14 companies. This list was then cross-checked for accuracy with the Forest Utilization Specialist at the Wisconsin Department of Natural Resources, and the 2004 Wisconsin Manufacturers Directory—Products Section: Wood Household Furniture. This resulted in 1 additional company of 20 or more employees being added to the list. If a discrepancy occurred relating to the specific product manufactured or if there was a difference of greater than 40 percent in the number of employees stated by the two directories, the companies were contacted to confirm the actual product manufactured and employee total. This resulted in one company being removed from the list because it did not produce wood household furniture as its primary product. The final list of 14 large companies was the roster for our questionnaire to determine impacts of foreign-made products on the wood household furniture

industry in Wisconsin. Of the final list of 14 companies, only 1 of the companies declined to participate in the study.

Small wood products companies, defined as those companies with less than 20 employees, were also surveyed for their impression of foreign competition, their particular product, and how they are adjusting to market changes to ensure competitiveness. Although it was the intent of this paper to gauge the opinions of the larger manufacturers due to their greater impact on Wisconsin's economy, by including small companies in the study, comparisons could be made with the large companies regarding opinions on competition, survivability, and tariff effectiveness and/or support; differences and similarities could be noted. The small company survey used the same questionnaire as the large company survey. Initially, a combined search of the Secondary Directory and the Manufacturers Directory—Products Section: Wood Household Furniture produced a list of 61 firms that employed 19 or fewer workers. Of this population, a sample of 10 companies with approximately 10 employees each was chosen. Of those 10 companies, 1 was no longer in business, 1 no longer manufactured furniture due to health reasons, 1 company manufactured millwork, although it is listed as a furniture manufacturer in the directory, and 1 manufacturer did not want to be part of the survey. All four companies were removed from the survey roster. Efforts to increase the sample of small companies were not employed given the study's primary focus on the large manufacturers.

### Data collection

All companies were contacted via an introductory letter, with a follow-up interview scheduled. All interviews were completed with both face-to-face site visits and through phone conversations. During the interviews, a questionnaire was administered that measured the insights and opinions of the survey subjects relating to their business and how they perceive it to have been affected by foreign competition. The respondents were also asked to list the steps they have taken to remain competitive against foreign competition and if they believed the tariff placed on foreign-made furniture would affect the American furniture industry.

## Results and discussion

### Large company questionnaire

Through the use of the questionnaire, insights and opinions were gathered as to the current state of the furniture industry and the separate companies themselves. The following sections summarize responses from the large firms that manufacture wood household furniture. Responses are further summarized in **Table 1**.

*Effect of foreign competition.* — "Life has completely and forever changed. If you would have told me ten years ago I'd be doing business in the far East, I wouldn't have believed you." - Respondent, Company 4.

As summarized in **Table 1**, 11 of 13 respondents answered affirmatively that they had been affected by foreign competition. Company 1 believed foreign imports were only one part of the reasoning for the impacts it was experiencing and that the general economy had impacted the company just as much. Company 4 echoed this statement as well as the need for company survival.

Representatives from companies 2 and 4 commented that consumers were the real reason for the impact because of their

Table 1. — Large company responses.

Company	Importing had an effect?	Currently importing manufacturing?	Increase or decrease of jobs?	Thoughts about tariff?	How to stay competitive
1	Yes	Yes	Currently stable, may need to decrease	No effect	Blended strategy with approximately 20% imported from Thailand.
2	Yes	Yes	Decrease	No effect	Increased turns. Short lead times.
3	Yes	No	Currently stable, may need to decrease	Good	Outsourcing materials. Use of automated machinery.
4	Yes	Yes	Decrease	No effect	Blended strategy with approximately 75% imported. Mass-customization approach of specialty furniture.
5	Yes	No	Decrease	No effect	Nobody will stay price competitive, but some consumers are willing to pay for higher end product.
6	Yes	Yes	Decrease	Bad	Working in specialty furniture. Continuing to import dining room furniture.
7	Yes	Yes	Decrease	No effect	Each company has to be efficient as possible, depending on specific company. Need new facilities.
8	Yes	No	Increase	No effect	Mass customization. Continual reinventing of business. Must know what products you produce cost competitively.
9	No	No	Increase	No effect	Mass customization. Quick delivery and many options. No purchase size minimum.
10	Yes	N/A <sup>a</sup>	Decrease	No effect	Found niche market for specialty furniture.
11	Yes	No	Decrease <sup>b</sup>	To an extent	Cell type operation-became very lean after fire and never changed.
12	Yes	No	Increase	No opinion	Cut costs, improve efficiency, improve service. Short lead times.
13	No	No	Increase	Maybe	Continued to produce specialty furniture not affected by imports.

<sup>a</sup>N/A = respondent moved out of the wood household furniture market segment; they no longer produce wood household furniture nor import it.

<sup>b</sup>Due to fire, loss of customer to domestic producer.

ability to drive down prices, which results in the need for low-cost manufacturing.

*"I can buy a finished product delivered from China cheaper than just buying the wood. Foreign competition has affected us because consumers are always looking for the lowest price . . . big box retailers measure their progress by getting a lower price, which is driven by the consumer, then the consumer wonders why jobs are lost . . . If consumers would pay what it actually takes to make the product, we wouldn't be going to China."* - Respondent, Company 2.

A representative from Company 8, however, mentioned that the competition from foreign manufacturing had assisted in making his company more efficient.

*"Foreign competition has affected every company – bad news, they've affected us, good news, they've affected us. It forces us to reinvent our business."* - Respondent, Company 8.

The representative from Company 8 also stated that health care costs, governmental regulations, and a difference in currency valuation policies between countries were to blame for the downturn in manufacturing. In addition to foreign competition, antiquated production facilities and a lack of governmental assistance were two other reasons suggested for the decrease in domestically produced furniture.

The two remaining companies stated they were not affected by foreign competition because the product they were producing was very specialized. The specialization in the case of the larger companies referred to the company's production capability, their specific product, or a combination of both.

*Current domestic manufacturing status and employee retention.* — When asked if the specific company was currently importing furniture, 5 of 12 respondents answered yes.

The percentage of product imported ranged from 20 to 100 percent. The remaining seven responded that they were not currently importing their products.

The respondents were asked if they believed their company had experienced a loss of jobs due to foreign competition. Six of the 13 respondents stated that they believed jobs had been lost due to foreign competition, 4 companies actually increased their staffing, and 1 company had decreased employees because of a fire. The fire resulted in the company scaling back its production facility, its production lines, and the staff necessary to complete necessary production. The company did state that at one point in its history it was forced to lay off workers because of the loss of a customer to a competitor. The competitor, however, was domestic. Two additional companies believed that although the number of employees had remained stable, it was very possible staff would need to be reduced due to a decrease in sales due to foreign competition.

*Effectiveness of furniture tariff.* — The companies were asked their opinion as to the effectiveness of the tariff on imported furniture and its impact on the industry as a whole. Eight of the companies replied that the tariff on bedroom furniture as it is currently imposed would not have any long-term effects on the furniture industry. Three of these respondents claimed that because the tariff is only applied to bedroom furniture, it would not have much of an impact on the industry. In addition, four of these companies stated that the tariff would not be effective because it only affects China. Vietnam and Mexico were mentioned as alternate countries that manufacturers could use in place of China. Three respondents also believed that loopholes in the tariff, such as the tariff's implementation against finished furniture and not against manufactured parts, will allow trading to occur despite the tariff's

Table 2. — Small company responses.

Company	Importing had an effect?	Currently importing manufacturing?	Increase or decrease of jobs?	Thoughts about tariff?	How to stay competitive
1	No, too specialized.	No	Increase	Will have some impact, but nothing long term.	Stay lean, specialize in design. Work directly with interior designers. Continually improve.
2	Yes, driving us out of business.	No	Decrease	Not sure if it will help. "Hope so."	May look at other things to do.
3	Not sure, economy or foreign competition.	No	Decrease	Might help even playing field.	Talked about trying to find another market. Need more retailers to market goods.
4	Yes, but other things too.	No	Decrease	Supports tariff, but minimal effect.	Trying to find a specialty market.
5	No, too specialized.	No	Level	No opinion.	Must be flexible. Need to alter business so it's not affected by competition. Has a high volume of repeat business.
6	No, but concerned that it will affect his customers.	No	Increase	Supports tariff, but minimal effect.	Stays in touch with market. Knows he must be flexible.

intent. One domestic manufacturer was contacted by a bedroom furniture importer and was asked if they would assemble imported parts, thereby sidestepping the tariff. Another respondent stated that the time and money used for "bureaucracy and legislation should have been used to increase efficiency." He suggested that the imposition of a minimum wage in China would not only help the Chinese worker, but would cause the Chinese to absorb more of their own goods, which would help the overall economy. He concluded his comments by saying this solution was "easier said than done."

One company didn't believe in the effectiveness of the tariff and had actually been negatively affected by it.

*"The tariff has wiped out approximately 65% of our business, and it was done by our own people. What they are doing now is about ten years too late. The quality furniture is getting high tariffs and the low quality stuff is getting low tariffs."* - Respondent, Company 6.

According to the representative from Company 6, the Chinese company that was to produce furniture for the company had just begun manufacturing and didn't have a history to report to the Department of Commerce. Because of the inability to submit a history of its business, the foreign company was levied the highest tariff of 198 percent. Another company that is importing questioned the fairness of the tariff application stating that the larger manufacturers were charged the smallest tariffs and the small Chinese manufacturers were assessed the largest tariffs. The representative for that company suggested that the difference in the tariff amounts was politically motivated.

Three of the respondents were supportive of the tariff, although one of the supporters believed it would have problems because of the lack of global application. Another respondent who believed the tariff is good for the furniture industry stated the following:

*"The U.S. Government has an obligation to protect American business to the extent products that are dumped in to the U.S. at or below cost prices should be penalized. American manufacturers need a more level playing field. Where labor is a large portion of the cost of product, we should be ready to levy tariffs to protect the American worker."* - Respondent, Company 3.

The final respondent had no opinion as to the viability of the tariffs application and/or its effect on the furniture industry.

*Suggestions for remaining competitive.* — The respondents were asked what plans they put in place and what ideas they would suggest to help a firm stay competitive in the global market. As previously noted, 5 of the 13 respondents are currently importing furniture to enable their company to be competitive. Of the 13 respondents, 8 replied that their manufacturing scheme includes specialization. The specialization was in the process, the product, or a combination of both. As an example, two of the companies practice "mass customization," in which the company can make large orders of a specialized product by offering many choices of models, colors, and wood types. One of the companies also has no minimum order size, which can be problematic for a retailer if a particular manufacturing run ends up not being popular with the public. Examples of specialization in product included the manufacturing of high quality, special order furniture (four respondents), and small niche products (three respondents). Additional suggestions for competitiveness included the ability to provide customers with a quick turnaround (three respondents). Six of the respondents specifically mentioned the maximization of efficiency through cutting waste in the production process or through decreasing the size of the production run. One of the respondents also stated "whatever can be done to make the process more efficient should be done. Each company has to specifically adapt." This respondent also stated that new infrastructure and buildings would assist a company in being competitive.

*"We're in an industrial revolution . . . if we can't think up some new technologies it's unsure what some people will do for work. We can't all sell insurance to one another."* - Respondent, Company 1.

### Small company questionnaire

The following sections summarize responses from the small firms for the questionnaire. Responses are further summarized in **Table 2**.

*Effect of foreign competition and suggestions for remaining competitive.* — When asked if foreign competition had affected them, three of the six respondents answered no. These three companies also had somewhat similar opinions as to the reason for their survival and ability to remain competitive. Primarily they believed their survival was based on specialization, short lead times, and the ability to produce a high-end product. One of the three firms also found it helpful to work

directly with interior designers who have a clientele of customers desiring finely detailed workmanship and customized designs, colors, and finishes. Another respondent claimed that although foreign competition wasn't a concern for his business in terms of head-to-head competition, he was concerned that his product could become unaffordable for customers who had lost employment and wages due to foreign competition in other industries. He added that it was important to stay in touch with the furniture market and that he must remain flexible. The third business owner replied that much of his business comes from repeat customers. He also stated that flexibility and the ability to adapt to change were the keys to remaining competitive.

*"American manufacturers can't control what Chinese workers are being paid. . . if my business was being disrupted because of foreign competition, I'd alter the business so it wasn't affected. That's life. That's competition."* - Respondent, Company 5.

One of the three respondents who agreed that foreign competition had affected his business and the wood furniture industry as a whole stated that the inability to keep affordable labor was the biggest reason his company had changed. Rising wages, in addition to employer-paid benefits such as health care, were the cause for lost business. Specifically, the respondent stated that, "Employees know their rights and they set the rules." This respondent did admit, however, that a contributing factor to lost business was due to "spending too much time manufacturing and too little time marketing." Of the two remaining companies, one agreed that his firm had lost business due to foreign competition, and the other was unsure if foreign competition, the economy, or a mixture of the two caused his business to decline. In all three cases, the companies attempting to find a specialization had discussed altering the business to suit a different specific market.

*Employee retention, tariff effectiveness, and current domestic manufacturing status.* — When asked about changes to the number of workers the companies were employing, of the three firms that believed they had not been affected by foreign competition, one company representative responded that the number of employees at his firm had remained constant for the prior 6 years. The two other companies had hired additional workers to meet demand. The three companies that stated they were affected by foreign imports had experienced employment decreases of either 95, 40, or 60 percent in the last 5 years.

The respondents were asked their opinion regarding the effectiveness of a tariff on foreign-made furniture. Four of the respondents were supportive of tariffs, one of which stated, "Tariffs might help even the playing field." The second positive respondent wasn't completely convinced that tariff imposition on imports was a cure for his business problems or the furniture industry's problems, but stated that he hoped it would help.

*"Imports are putting me out of business. . . something has to be done to even the playing field."* - Respondent, Company 2.

The third positive respondent questioned why the tariffs are only placed on bedroom furniture, and he believed that the imposition of the tariffs would be of minimal help.

*"The problem is that the U.S. consumer will not buy anything unless it has a 'sale' tag on it."* - Respondent, Company 4.

The fourth of the positive respondents supported the tariff but didn't think it would be effective because it is only placed on Chinese-made products. Of the remaining two respondents, one believed that the tariffs would have an impact on some businesses, but that in the long term it wouldn't have much of an effect. The final respondent had no opinion.

All six businesses were asked if they were currently importing from a foreign manufacturer. None of the six responded that they were importing.

## Conclusions and policy implications

Specialization seems to be one of the most important ways for a large company to be competitive. Eighty-five percent of the respondents replied that they had been affected by foreign competition and believed that they could not be competitive in terms of price. By finding a market, either through product or process specialization or a combination of the two, the companies were staying competitive. Those companies that were unable to find a specialization were the companies most likely to import their product, enabling them to remain in the market.

With respect to tariff issues, 8 of 13 respondents believed the tariffs would have no effect on the industry. It was noted, however, that on an individual scale, the tariff could have quite a damaging effect. Further competitive strategies included increased process efficiency, newer facilities and infrastructure, and increased governmental assistance for existing businesses, other than tariff imposition.

As with the large companies, among the six small companies, it appears that survivability depends on finding the specialized market that will allow a company to be competitive. This may include the product that is demanded or the service that is required to make a company's product preferable to a foreign competitor's product. It also appears that having a proven track record, in some cases, will enable a manufacturer to keep its business, as long as the manufacturer is dependable and can produce a high quality product. Flexibility and the ability and willingness to change with market fluctuations also appear to be keys to remaining competitive.

With respect to opinions on tariff imposition, the smaller companies agree that tariffs should be placed on foreign-made products to protect their businesses. Although they are unsure if the tariffs would be effective, the companies agree that assistance to "even the competitive playing field" would be helpful.

When considering the responses of both the large and the small furniture manufacturers, Schuler and Buehlmann's (2003) observations respective to aging manufacturing facilities and their suggestions for company survivability through specialization are supported. Further, it would be advisable for Wisconsin's furniture industry to research the possibility of attaining favorable tax status and improved regulatory advantages similar to those that the Wisconsin paper industry has recently gained (Nacker 2004). More than one of the companies interviewed suggested that State of Wisconsin governmental agencies did not support businesses in the state or were not inclined to aggressively keep businesses from moving to another state. Tax Incremental Financing (TIF) can help a municipality undertake a public project to stimulate beneficial development or redevelopment that might not otherwise occur. It has been suggested that not all projects funded by TIF have met the original intent of the funding program.

More prudent use of TIF sources could assist in rebuilding facilities that are outdated. The forestry industry cluster that is so important to the economy of the State of Wisconsin decreased its market share during the 1990s (Nacker 2004). Perhaps a more business-oriented and business-friendly atmosphere would not only keep business in the state, but would also encourage the cluster to grow.

The global economy affecting the furniture industry is affecting more than just the industry itself. On a global scale, the idea of a minimum wage is an interesting yet probably unattainable ideal. As was mentioned, such a rate could assist the very poorest countries, which would eventually assist the richest. Additional buyers of goods create additional production.

Increased exportation is very important for the growth of any industry. While increased exportation to China of American goods will be helpful because of China's growing economy, it's unknown if requiring the Chinese to allow their currency rate to change freely according to the market will better enable industries in other countries to compete. Further, if it is necessary to penalize a country for what is determined to be unfair trade practices, unless tariffs can be imposed equally, including equal imposition across product lines and countries, the process and result of gaining tariff imposition doesn't appear to be efficient or effective.

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