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P O L A N D

STATEMENT ON THE WOOD MARKET REVIEW AND PROSPECTS

Ministry of the Environment

1. GENERAL ECONOMIC TRENDS AFFECTING THE FOREST AND FOREST INDUSTRIES SECTOR

In 2015 the dynamics of Gross Domestic Product was 3.6% in real terms and was 0.3 percentage point higher than in 2014. Domestic demand was still the main growth factor (while consumption demand played more important role than investment demand), and increased 3.4% in relation to the previous year, although its dynamics was lower than in 2014 (when it reached 4.9%). General consumption was 3.1% higher than the year earlier, including public consumption which was 3.4% higher. Exports, at a level of 0.3% had a positive effect on the GDP increase. The real rate of the investment outlay growth slowed down to 5.7% (from 9.5% in 2014). Gross value added increased 3.4% (3.3% in 2014), including in industry, where the growth was 5.6%, and construction, where the increase was 4.6% (in 2014 the values were 4.6% and 9%, respectively). It is assumed that, depending on the situation on the global and European markets, the real GDP growth may range from 3.3 to 3.7% (annual average) in the years 2016-2017 in Poland. Domestic demand, mainly private, will continue to be the basic factor of the economic growth (an average annual increase of more than 4%). In connection with the anticipated acceleration in spending the EU funding, the contribution of public investment to GDP should also increase.

In 2015 sold production of industry increased 4.8% in real terms (from 4.1% in 2014). In manufacturing the increase was 5.7% (compared to 5.5% in 2014). Like in few previous years, the dynamics of sold production in the wood sector was higher than the average in industry: sold production of the wood industry increased 5.6%, of the pulp and paper industry (together with paper processing) 4.7%, and of the furniture industry 9.5% (the furniture industry was one of the industries characterised by the highest dynamics of sold production in Poland). Sold production of the wood sector amounted to PLN 113 bn (approximately $ 34.5 bn, € 31.1 bn) and accounted for 8.9% of sold production in industry and 10.3% in manufacturing. The branch structure of sold production of the wood sector was as follows: the furniture industry had the biggest share of almost 35% and the wood industry and pulp and paper industry (together with paper processing) had the share of approximately 33% each. It is estimated that in the near future an average annual increase of sold production of industry may be 4-5% in real terms. The up-to-date performance of the wood sector in 2016 suggests that the wood industries, especially the furniture industry, should record a 2-3 percentage points higher increase in sold production.

The growth of economic activity was reflected in an improvement of situation on the labour market. In 2015 registered unemployment rate decreased to 9.8% (from 11.4% in the previous year). A slight increase in average employment was recorded (0.2%; and 1.3% in enterprise sector). The average employment in industry increased almost 1% (to 2.7 m people), and in manufacturing 1.6% (to 2.3 m people). The wood sector employed almost 314 thou. people, i.e. almost 3% more than in 2014. The furniture industry was a leader in terms of the employment growth (5%; to almost 154 thou. people), followed by the pulp and paper industry together with paper processing (1%; to almost 55 thou. people) and the wood industry (0.5%; to 105 thou. people). The employed in the wood sector accounted for 11.6% of the employed in industry and 13.7% of the employed in manufacturing. As regards the branch structure of employment in the wood sector, the share of the furniture industry was more than 50% (dominating), and the share of the pulp and paper industry (together with paper processing) and the wood industry was 18% and 31%, respectively. On the other hand, in 2015 employment in forestry remained unchanged at a level of the previous year, i.e. 40 thou. people (mainly working in forest management and rendering services related to forestry). It is estimated that in the years 2016-2017 economic situation in Poland will be conducive to further improvement of situation on the labour market. The unemployment rate should continue to fall – to 9.1% at the end of 2016 and approximately 8% at the end of 2017. This phenomenon will be accompanied by an increase in employment in domestic economy – 1.6% in 2016 and 0.7% in 2017. The labour market in the forestry-wood sector should also be characterised by upward trends. The anticipated average annual growth of employment should be 1-2% in the wood industry and pulp and paper industry (together with paper processing), and 4-5% in the furniture industry. On the other hand, employment in forestry should remain unchanged at a previous level of approximately 40 thou. people.

In 2015 foreign trade was characterised by a faster growth of exports (7.7% in fixed prices in relation to the previous year) than imports (5.3%). Poland exported goods and services of a value of PLN 750.8 bn (i.e. $ 200.3 bn; € 179.6 bn), and the value of imported goods and services was PLN 741 bn ($ 197.7 bn; € 177.2 bn). As a result, the balance of foreign trade was positive for the first time in many years, and amounted to almost PLN 10 bn ($ 2.7 bn; € 2.3 bn). The main foreign trade partners of Poland, especially regarding export, are the European Union countries (Germany, United Kingdom, Czech Republic, and France), but China is continuously gaining in importance as regards import (its share in the structure of imports increased from 10.4% in 2014 to 11.6% in 2015). In 2015 Poland exported to the European Community goods of a value exceeding PLN 596 bn ($ 159.2 bn; € 142.5 bn), which accounted for more than 79% of the total value of Polish exports. Imports from the European Union area amounted to PLN 444.7 bn ($ 118.8 bn, € 106.4 bn) and accounted for 60% of the total value of Polish import of goods. However, the dynamics of the trade with the European Community countries was lower than in 2014: 1 percentage point in the case of exports and 4.6 percentage points in the case of imports. The Central and Eastern European countries are not significant foreign trade partners of Poland. In 2015 their share in exports was 9%, and in imports 8.6%. Wood products are a significant item in foreign trade, and furniture is one of the most important commodity group in Polish exports. Wood products accounted for almost 9% of exports (PLN 66 bn, $ 17.6 bn, € 15.8 bn) and 4% of imports (PLN 29.6 bn, $ 7.9 bn, € 7.1 bn), and it was 8% more as regards exports and 6% more as regards imports, in current prices, than in 2014. A positive balance of foreign trade in those products amounted to PLN 36.4 bn ($ 9.7 bn, € 8.7 bn) and was 9% higher than in 2014 (in current prices). It is assumed that in the years 2016-2017 the high competitiveness of Polish goods on foreign markets will be maintained, thus the real export growth rate should increase, but slower than previously (the estimation is 6% in 2016 and 5.5% in 2017). On the other hand, the dynamics of imports will be affected by the currency exchange rate and final demand. It is estimated that in the years 2016-2017 the real growth of imports will be 6.6% and 6.4%, respectively. Wood products will still be of great importance, especially for exports. The exports of that product group may continue to increase faster than imports (according to estimation a average annual increase will be at a level of 5-6% for exports (in current prices) and 3-4% for imports (in current prices)).

In 2015 Poland recorded an almost 1% decrease in price index of consumer goods and services. It was largely the reaction to raw material price reduction on the global markets. It is forecasted that deflation will also continue in 2016 (a 0.4% decrease of CPI). In 2017 there should be an increase in price pressure and inflation is to be 1.3%.

In the near future, socio-economic situation in Poland will be largely dependent on situation worldwide, in Europe and in the European Union countries. Brexit will have a significant bearing on the economy, but currently it is difficult to estimate its consequences. Situation on the eastern markets (conflict between Ukraine and the Russian Federation) and in Middle East and Northern Africa (the lack of political stability in Turkey and migration issues) will also have a great influence on the economic growth rate, and so will the situation in China, i.e. a slowdown of previously very dynamic growth as well as large imports of price-competitive products from that country.

2. POLICY MEASURES TAKEN IN POLAND OVER THE PAST 18 MONTHS, WHICH MIGHT HAVE A BEARING ON TRADE AND MARKETS OF FOREST PRODUCTS OR FOREST MANAGEMENT

In 2016 Poland presented the *State's Multiannual Financial Plan for the period 2016-2019* (European Union Member States are obliged to prepare such plans). The *Plan* is the basis for a draft of the budget act for 2017 and is comprised of two parts, i.e. the *Convergence Programme. Revision 2016* and the *Main goals of the function of state together with measures to achieve them*. The *Plan* presents an analysis of current economic situation in Poland and a medium-term forecast of its development by 2019, together with basic macroeconomic indices (after the EU finished the procedure of excessive deficit in 2015, Poland is currently subject to the requirements of the preventive part of the *Stability and Growth Pact*). It also defines the main goals of the economic policy and actions to achieve them. Those goals directly or indirectly concern Polish forestry-wood sector. The priority is to maintain the stability of public finance and, at the same time, aid inclusive economic growth. The planned actions include main structural reforms such as: continuation of the pro-family actions (*Family 500+*, *Dwelling+*), reduction of the retirement age, actions aimed at sealing the tax system, and increasing the tax-free amount.

In Poland the latest guidance and programme document in the area of the development policy is the *Plan for Responsible Growth*. The document is also addressed to the forestry-wood sector. Implementation of that plan is to "free the [Poland's] own potential for a responsible growth of Poland and enhancement of the welfare of Poles" and facilitate escaping the five development traps, i.e. average income, the lack of balance between foreign and national capital involved in the economy, average product, demographic trap, and the weakness of institutions. The *Plan* is a vision of Poland's development by 2020 and by 2030, and a set of instruments – economic, financial, and institutional – which are to dynamise the development of Poland. The *Plan* points to five pillars of the economic development of Poland: reindustrialisation, development of innovative companies, capital for development, foreign expansion, and social and regional development. The potential of Polish economy is to be enhanced through building a strong industry, aiding investments, and creating friendly institutional and legal environment for emergence, strengthening, and foreign expansion of Polish business, while, at the same time, national and foreign finance is used effectively. The executive tool of the Plan will be the *Strategy for Responsible Growth*, which is consulted at present.

At the national level an important instrument for the implementation of the EU strategy *Europe 2020* is the *National Programme of Reforms. Revision 2016/2017*. The *Programme* presents a medium-term forecast of the economic development of Poland by 2019, refers to major socio-economic challenges defined in the *National report – Poland 2016*, and discusses actions taken in 2015 in order to achieve the goals of the *Europe 2020* strategy in the field of employment, the outlay on R&D, primary energy consumption, education, and counteracting poverty and social exclusion. The *Programme* also discusses major actions concerning said scope, which are planned for the period 2016-2017, their schedule, financing, and the assessment of their consequences for the sector of public finance. Poland is considered to progress in achievement of set goals, but this progress is different in various fields. It is planned to make greater use than before of intelligent specialisations, encourage entrepreneurs to cooperate closer, strengthen the collaboration between science and business, and increase financial support for start-ups and SME sector.

The forestry-wood sector, like the other industries, is also one of the addressees of the *Action plan for the increase in the effectiveness and acceleration of the implementation of* *programmes of the Partnership Agreement 2014-2020.* The major assumption of the *Action plan* is to increase the effectiveness and accelerate, at a national and regional level, the implementation of programmes financed by the EU funds for the period 2014-2020, and fully use the EU funds, so as to achieve a long-term socio-economic development of Poland. Besides a diagnosis of situation and an analysis of conditions, the *Action plan* also defines major challenges faced by the institutions implementing the EU programmes, as well as anticipated further actions.

3. MARKET DRIVERS

The economic development, including the wood market development, is stimulated by all actions aimed at the growth of entrepreneurship, competitiveness, innovativeness, and the labour market, as well as the support for foreign expansion and social and regional development.

In this context a significant role falls to intelligent specialisations in Poland, i.e. industries or areas of the economy or science with the greatest potential for development (i.e. guaranteeing an increase in added value of the economy and enhancing its competitiveness on foreign markets) and supported by the EU funds within the financial perspective 2014-2020. In Poland, intelligent specialisations were defined at a national and regional level. Twenty Polish *National Intelligent Specialisations (KIS)* include also specialisations relating to the forestry-wood sector. Presently these are mainly: KIS 4. – Innovative technologies, processes and products of the agriculture and food sector and the forestry-wood sector; KIS 10. – Modern technologies of acquisition, processing and use of natural resources, and production of their substitutes; KIS 11. – Minimisation of waste production, including waste unfit for conversion, and the use of waste for material and energy purposes (recycling and other methods of recovery); KIS 13. – Multipurpose materials and composites with advanced properties, including nanoprocesses and nonaproducts. The furniture industry is also mentioned as an industry branch, where there is a chance to become a leader on the global market.

In the near future, the instruments supporting entrepreneurship and innovativeness offered by the *Polish Development Fund*, in preparation, will be important for the development of economy and the forestry-wood sector in Poland. The scope of aid will be broad and encompass many areas, including investments, infrastructure, export, consulting, and promotion. Due to the significance of wood products for Polish exports, the forestry-wood sector is especially interested in support for export financing, including, inter alia, the development of export insurance. Exporters are also supported by the *Programme of Polish Furniture Promotion* addressed to small and medium-size furniture companies. The Programme is drawn up for the years 2016-2019 within the framework of the *Smart Growth Operational Programme* and finances, inter alia, some costs of promotional and informational actions connected with the search for ready markets outside the EU (in China, United Arab Emirates, USA, India, Turkey, Russian Federation or Kazakhstan) and with participation in at least four fair events outside Poland (from among the events defined in the *Programme*).

The programme of start-up support, i.e. #*StartInPoland*, is another tool that is to enhance entrepreneurship and innovativeness. #*StartInPoland* offers a package of instruments dedicated to young, innovative businesses. The companies receive help not only at the stage of incubation and acceleration, but also in the phase of further growth and international expansion.

Solutions envisaged in the *Business Constitution*, in preparation, are to be an impulse to develop the entrepreneurship in Poland. The *Constitution* is to be an act regulating the principles of running business in Poland in a comprehensive manner. This is to create a favourable environment for business and adapt the legal setting to make the most of the growth potential of companies.

The actions aimed at increasing the outlay on R&D are a significant stimulus of the economic development, including the development of the wood market. To this end, there has been prepared an amendment to the act on innovativeness, which contains a coherent system of solutions encouraging citizens to start innovative activities and rewarding such actions, including a set of tax instruments and simplified procedures facilitating the cooperation between science and industry, as well as commercialisation of research. A similar purpose has the programme "*Dialog*" launched by the Ministry of Science and Higher Education in 2016. The *Programme* is to aid actions oriented at building the cooperation and long-lasting relations between science and the socio-economic sphere. It focuses on the actions aimed at the implementation of solutions that enhance the quality and competitiveness of scientific research, stimulating innovativeness, and establishing mechanisms of the cooperation between science and economy, as well as strengthening the potential of humanities and stimulating their development.

4. DEVELOPMENTS IN FOREST PRODUCTS MARKETS SECTORS

4.1. (A) Wood raw materials

In 2015 41.4 m m^3 of roundwood was harvested in Poland, i.e. 1% more than in 2014 (net, without bark). This amount encompassed more than 1.1 m m^3 of wood from afforested areas (production and protective planting of trees and shrubs on public and private areas, outside forests and green areas within the cities). Like previously, harvested roundwood originated mainly from public forests (95%; 39.2 m m^3), including the forests stewarded by the State Forests National Forest Holding (93%; 38.4 m m^3). The assortment structure of roundwood removals (including wood from afforested areas) was dominated by softwood (74%). 88% of roundwood removals, i.e. 36.2 m m^3, was intended for industrial purposes (1.5% more than in 2014). 52% of this roundwood was pulpwood (18.7 m m^3; a more than 3% increase in removals in relation to 2014), and 45% sawlogs and veneer logs (16.4 m m^3, a volume similar to that of 2014). 5.2 m m^3 of fuelwood was also harvested (like in 2014). 2.7 m m^3 of roundwood was exported and it was about 9% less than in 2014. Wood exports amounted to more than 6% of domestic removals (including wood from afforested areas) and most of it was wood intended for industrial purposes (93%, about 2.5 m m^3). The assortment structure of exports remained unchanged compared to the previous year, i.e. softwood species dominated (about 2.2 m m^3). The exports of pulpwood amounted to 1.1 m m^3 (a similar volume to that of 2014) and of sawlogs to 1.3 m m^3 (10% less than in the previous year). The exports of the other industrial wood assortments was insignificant. In 2015, export of firewood was about 13% lower than in 2014 and amounted to 0.2 million m^3. On the other hand, Poland imported about 2.6 m m^3 of roundwood, i.e. over 6% less than in 2014. Imported wood accounted for 6% of domestic removals (including wood from afforested areas) and almost all of it was roundwood intended for industrial purposes, of which 54% was softwood (in 2014 softwood accounted for 50% of industrial roundwood imported to Poland). Pulpwood imports dropped 8% compared to the previous year and amounted to 1.7 m m^3, while sawlog imports increased 3% and amounted to 0.2 m m^3. Poland also imported approximately 0.6 m m^3 of the other industrial wood assortments. Fuelwood imports recorded a significant decrease, i.e. five-fold (from approximately 90 thou. m^3 to 17 thou. m^3).

It is estimated that in the period 2016-2017 an average annual increase in roundwood removals may be approximately 1-2%, i.e. to 42.1 m m^3 and 42.7 m m^3, respectively. Industrial wood should continue to dominate the structure of removals with a share of approximately 88% (36.9 m m^3 in 2016 and 37.5 m m^3 in 2017). It is also assumed that fuelwood removals will grow to 5.3 m m^3 in 2017. According to forecasts, previous levels of wood exports and imports should remain the same till 2017. It will be almost entirely a trade in industrial wood (in 2017 its exports may amount to 2.7 m m^3, and imports to 2.6 m m^3). It is estimated that domestic wood market may be affected by the growing demand, on the one hand, and a limited access to relatively cheaper imported wood (the ban on raw wood export from Belarus; the moratorium on unprocessed wood export from Ukraine), on the other hand.

4.2. (B) Wood energy, with a focus on government policies promoting wood energy

The production of renewable energy is systematically growing in Poland. In the period 2010-2014 it increased from 6.9 m toe to 8.1 m toe, i.e. almost 18%. The share of renewable energy within total production of energy was 11.8% in 2014, and within total consumption of energy 8.5%. Solid biomass is the most important renewable energy carrier. It is estimated that wood biomass is approximately 85% of solid biomass.

The renewable energy market in Poland is regulated by, inter alia, the *Act on renewable energy sources*, amended in 2016. The effective regulation is to help achieve a 15% share of renewable energy within total energy consumption by 2020, and this is in line with the energy policy of the European Union. The *Act* provides for the possibility of co-burning wood for energy purposes and fossil fuels and introduces the general term “energy wood” understood as *“raw wood material which due to its quality and dimensional as well as physico-chemical features is of lower technical and functional value, which makes it unfit for industrial purposes”*. The *Act* also defines the concept of local biomass, i.e. biomass which was originally acquired within a 300 km radius from a RES installation (this concerns mainly biomass from energy crops, waste from or the remainder of agricultural production and the industry processing its products, as well as high quality grains, obtained in a sustainable way). The new regulations define also the principles of support for green energy. The *Act* also broadens the definition of prosumer (entities such as self-government units, parishes, and schools can also be prosumers) and simplifies the regulations connected with prosumer activity.

Since wind power industry has dynamically developed in previous years in Poland, a legal framework of its operation was established in the form of an act in 2016. The *Act on investments in wind power stations* sets the conditions and the mode of location and erection of wind power stations (of power not exceeding 40 kW, i.e. to the exclusion of micro installations). The *Act* introduces the definition of a wind power station and subjects the possibility of its location to a local spatial development plan. It also introduces the distance criterion, i.e. a wind power station cannot be located closer than a tenfold its height from residential buildings and especially valuable natural areas (e.g. national or scenic parks and nature reserves).

4.3. (C) Certified forest products

Currently there two systems of forest and forest product certification in Poland: PEFC (*Programme for the Endorsement of Forest Certification Schemes*) and FSC (*Forest Stewardship Council*).

All State Forests Regional Directorates in Poland, i.e. 17 directorates, are subject to PEFC forest certification (as of July 2016). The area of forests certified within this system amounts to 7.3 m ha, i.e. more than 79% of the total area of forests in Poland. At the same time, it is almost 8% of forests certified in this system in Europe and more than 2% worldwide. In mid 2016 there was also 245 wood products certificates – CoC (Chain of Custody) registered in the PEFC system, which belonged to companies in Poland, of which 201 were active (group and individual certificates). The majority of CoC certificates (63%) belong to production companies, mainly manufacturers of sawnwood (at various processing stages), wood pulp, paper and paperboard and products made of them.

On the other hand, 16 out of 17 State Forests Regional Directorates and 2 Forest Experimental Stations (in Rogów and Siemianice) are currently certified under the FSC standard of forest certification. This means that in Poland the total area of forests covered by certification in the FSC system amounts to 6.9 m ha, i.e. more than 75% of their total area. At the same time, it is almost 8% of forests certified according to the FSC standards in Europe and approximately 4% worldwide. As at the end of July 2016, there were also 3012 FSC-CoCin certificates registered in Poland, of which 2052 (68%) was active. Approximately 70% of the total number of active certificates belong to production companies, mainly manufacturers of sawnwood (at various processing stages), wooden garden products, wooden accessories, furniture and furniture elements. Among the production companies holding active FSC-CoC certificates, 319 companies possess FSC-CW certificates (*FSC Controlled Wood*), and 167 companies obtained FSC RA certificates (*FSC Controlled Wood Risk Assessment*).

4.4. (D) **Value-added wood products**

In Poland value-added wood products are mainly furniture, builder's carpentry and joinery products, wooden packaging, and paper products.

In 2015 furniture of a value of PLN 35.1 bn ($ 9.3 bn, € 8.4 bn, together with furniture elements and mattresses) was produced in Poland. It was a 9% increase in the production, in real terms, compared to 2014. Wooden furniture accounted for approximately 70% of total furniture production. This was mainly upholstered and non-upholstered furniture for sitting and furniture for bedrooms, living rooms, and dining rooms. In recent years, the majority of Polish furniture has been exported, mainly to the European Union countries (Germany, United Kingdom, France, and Czech Republic). In 2015 furniture accounted for approximately 5% of the total value of Polish exports and was one of major groups of commodities exported. About 51% of exported furniture was wooden furniture (PLN 18.1 bn, $ 4.8 bn, € 4.3 bn). Compared to the previous year, their exports increased 6% (in current prices) and was dominated by furniture for sitting and furniture for rooms and living rooms. On the other hand, in 2015 the import of furniture to Poland (PLN 5.9 bn, $ 1.6 bn, € 1.4 bn) was approximately 13% higher than in 2014 (in current prices; however it accounted for less than 1% of total Polish imports). Furniture imports accounted for more than 17% of its domestic production. Poland imported furniture mainly from China and Germany. More than 23% of furniture imported to Poland was wooden furniture (PLN 1.4 bn, $ 0.4 bn, € 0.3 bn), its imports increased almost 9% in relation to the previous year (in current prices). The structure of wooden furniture imports was dominated by furniture for sitting and furniture for rooms and living rooms.

The value of builder's carpentry and joinery product manufacture amounted to PLN 7.1 bn in 2015 in Poland ($ 1.9 bn, € 1.7 bn; including the value of wooden houses production). It was an almost 10% increase compared to 2014, in fixed prices. 16.9 m m^2 of windows and doors was produced, meaning an almost 12% increase compared to the previous year. The production of wooden inlay remained at a level similar to that of 2014 and amounted to 2.1 m m^2, while the manufacture of laminated floor panels increased 2%, i.e. from 58.9 m m^2 to 60.2 m m^2. The exports of builder's carpentry and joinery products (including wooden houses (0.3 bn)) amounted to PLN 4.3 bn ($ 1.1 bn, € 1 bn), which accounted for 61% of the value of domestic production. It was almost 17% more than in the previous year (in current prices). The structure of exports of this group of wood products was dominated by wooden windows and doors. On the other hand, Poland imported builder's carpentry and joinery products of wood, whose value amounted to PLN 0.4 bn ($ 0.1 bn, € 0.09 bn; including wooden houses (0.007bn)). It was more than in 2014 (their imports accounted for 109% of the value of 2014, in current prices) and accounted about 5% of their domestic production value. The value structure of the import of builder's carpentry and joinery products of wood was dominated by flooring materials and windows and doors.

The value of wooden packaging produced in 2015 in Poland amounted to PLN 2 bn ($ 0.5 bn, € 0.4 bn), meaning an almost 8% increased in relation to 2014 (in fixed prices). This product group was dominated by pallet production. Packaging exports amounted to PLN 1.5 bn ($ 0.4 bn, € 0.4 bn), i.e. ¾ of domestic production. Exports was higher than in the previous year, i.e. it increased 3% in relation to 2014 (in current prices). Pallets accounted for 90% of the wooden packaging exports, while its imports amounted to PLN 0.2 bn ($ 0.06 bn, € 0.05 bn). Like in the case of exports, imports of this group of wood products was higher than in the previous year (4%, in current prices) and at the same time accounted for 11% of the domestic production value. Pallets also dominated the structure of imports.

Paper products make up an important group of wood products with a relative high added value in Poland. In 2015 their production amounted to PLN 22 bn ($ 5.9 bn, € 5.3 bn) and was almost 11% higher than in 2014 (in fixed prices). The value structure of this product group was dominated by two groups of paper products, i.e. corrugated paper and paperboard and packaging made of it (approximately 60% of production) and household products and toilet and sanitary products (27%). More than 33% of manufactured paper products was exported (PLN 7.5 bn, $ 2 bn, € 1.8 bn), i.e. approximately 9% more than in 2014 (in current prices). The value structure of export of this product group was dominated by packaging of paper and paperboard, special coated papers, paper articles for households, and sanitary paper articles. On the other hand, Poland imported paper products of a value of PLN 4.7 bn ($ 1.3 bn, € 1.1 bn), which was approximately 105% of the level of the previous year (in current prices) and accounted for 21% of the domestic production value. Main imports was packaging of paper and paperboard.

4.5. (E) **Sawn softwood**

In Poland the structure of sawnwood production is dominated by sawn softwood (in 2015 its share was approximately 89%). In 2015 sawn softwood production amounted to 4.3 m m^3 and was 2% higher than in the previous year. 0.6 m m^3 of Polish sawn softwood was exported, i.e. 2% less than in 2014. At the same time, it was also 14% of its domestic production. Sawn softwood imports also increased to 0.6 m m^3 (13% in relation to the previous year), and amounted to 15% of domestic production.

In the years 2016-2017 sawn softwood production may increase to 4.5 m m^3 and 4.6 m m^3, respectively. It is also assumed that its exports will amount to 0.6 m m^3 by 2017 (i.e. 3% more than in 2015), and imports to 0.8 m m^3 (an 18% increase).

4.6. (F) **Sawn hardwood**

In 2015 sawn hardwood production exceeded 0.5 m m^3. It was almost 6% more than in 2014. Similarly to previous years, most sawn hardwood was sold on domestic market – its exports amounted to 18% of its production, i.e. 0.093 m m^3 (5% more than in the previous year). On the other hand, sawn hardwood imports to Poland amounted to 0.3 m m^3 (a 25% increase in relation to the previous year). Imported sawn hardwood amounted to 59% of its domestic production. Approximately 4% of sawn hardwood imported to Poland were tropical species (0.01 m m^3).

It is assumed that in the years 2016-2017 sawn hardwood production will remain at a level of approximately 0.5 m m^3. Sawn hardwood exports should not exceed 0.1 m m^3, and its imports probably will amount to approximately 0.4 m m^3.

4.7. (G) Wood-based panels

In 2015 the production of wood-based panels exceeded 9.7 m m^3, and it was 6% more than in the previous year. The greatest increase in production, i.e. approximately 40% (from 0.4 m m^3 in 2014 to 0.6 m m^3 in 2015), was recorded for OSBs (owing to the launch of a new production line in Poland). The production of wet-process softboards and dry-process fibreboards also increased considerably, i.e. from 0.6 m m^3 to 0.7 m m^3 (almost 9%) in the case of wet-process softboards, from 3.1 m m^3 to 3.5 m m^3 (approximately 13%) in the case of dry-process fibreboards. On the other hand, the production of plywood dropped from 0.41 m m^3 to 0.39 m m^3, and the production of wet-process hardboards from 0.2 m m^3 to 0.1 m m^3. The production of particleboards (4.4 m m^3, without OSBs) and veneers (0.05 m m^3) remained at a level similar to that of 2014. Similar to previous years, the structure of wood-based panel production was dominated by particleboards with OSBs (with a share of almost 51%) and fibreboards (44%), dominated by dry-process boards (with a share of 81% within the total fibreboard production). 2.7 m m^3 of wood-based panels was exported (9% more than in the previous year), i.e. more than 27% of domestic production. Exports were dominated by fibreboards (1.7 m m^3, 64% of total exports of wood-based panels), of which 0.8 m m^3 were dry-process fibreboards (a 9% increase in exports compared to the previous year) and 0.6 m m^3 wet-process softboards (an almost 11% increase). Fibreboard exports increased 9% compared to 2014. On the other hand, particleboard exports amounted to 0.7 m m^3 (4% more than in 2014), of which 34% were OSBs. 0.3 m m^3 of plywood and 0.02 m m^3 of veneers was also exported. Polish imports amounted to 2.3 m m^3 of wood-based panels (5% more than in 2014), i.e. approximately 24% of their domestic production. Main imports were particleboards (1.6 m m^3, including 0.2 m m^3 of OSB) and fibreboards (0.4 m m^3, including mainly wet-process hardboards and dry-process boards). Additionally, 0.3 m m^3 of plywood and 0.05 m m^3 veneers were imported to Poland.

In the near future, an average annual increase in the production of wood-based panels will be approximately 2%, thus the production will be over 10.1 m m^3 in 2017. The structure of production should remain the same, i.e. particleboards (production of approximately 5.1 m m^3 in 2017) and fibreboards (4.5 m m^3 in 2017) will still dominate. The previous trends in foreign trade should also continue. It is estimated that wood-based panel exports will increase to 2.8 m m^3 in 2017 (an average annual growth will be 2% in the period 2016-2017), and their imports to approximately 2.4 m m^3 in 2017 (5% more than in 2015).

4.8. (H) Pulp and paper

For many years the production of wood pulp has oscillated around 1.1 m tonnes in Poland. In 2015 its quantitative structure was dominated by cellulose, whose share amounted to approximately 78% (0.9 m tonnes). Semi-chemical wood pulp accounted for more than 9% (0.1 m tonnes), mechanical wood pulp - 7% (0.08 m tonnes), and pulp other than intended for chemical processing for more than 5% (0.06 m tonnes). Apart from this, 0.1 m tonnes of pulp from fibres other than wood fibres and from recycled fibres was produced in 2015 in Poland, and this was similar to previous years.

Most of the wood pulp produced in Poland is sold on domestic market. In 2015 exports amounted to approximately 16% of domestic production of wood pulp (0.2 m tonnes) and was dominated by cellulose. This level of exports was similar to that of the previous year. Polish imports of wood pulp, on the other hand, totalled 1 m tonnes (meaning a 6% increase in wood pulp imports in relation to 2014). The imports was also dominated by cellulose. In relation to domestic production the import of wood pulp was 88%.

It is estimated that in the period 2016-2017 the production of wood pulp will still remain at a level of approximately 1.1 m tonnes (no rapid increase in the production capacity of wood pulp producers in Poland is anticipated). An upward trend should be also characteristic for the foreign trade, especially imports (due to the increasing domestic demand). An average annual increase in the exports of wood pulp may be approximately 2%, and in imports almost 2% and 5%, respectively, in the period 2016-2017.

In recent years, the upward trends have been characteristic of the Polish market in paper and paperboard. In 2015 paper and paperboard production increased 3% in relation to 2014, i.e. to 4.4 m tonnes. The assortment structure of the production was dominated by packaging papers (with a share of approximately 67%) and graphic papers (approximately 20%). 0.1 m tonnes of newspaper and 0.7 m tonnes of uncoated wood-free paper was also produced. Approximately 49% of domestic production of paper and paperboard was exported (2.2 m tonnes) and it was 2% less than in the previous year. Main exports were packaging paper and graphic paper; while 3.7 m tonnes of paper and paperboard was imported to Poland (3% more than in 2014). The imported paper and paperboard accounted for approximately 84% of domestic production. Like in the case of exports, the structure of imports was also dominated by packaging papers and graphic paper.

It is assumed that the production of paper and paperboard is to grow in the near future – to 4.6 m tonnes in 2017 (an average annual growth of almost 2%). As regards the foreign trade, an increase in both exports and imports of paper and paperboard is assumed. By 2017 the imports may increase to 3.8 m tonnes (i.e. 3% in relation to 2015), and exports to 2.2 m tonnes (i.e. about 2%).

4.9. (I) **Innovative wood products**

Innovativeness in the wood sector manifests itself in a drive toward obtainment of materials and products with new and improved physico-chemical properties and characterised by better quality and strength parameters, toward the alternation of the properties of those materials and products in order to broaden their application range, and finally toward saving the raw material, energy, and labour. It also stems from the increasing material substitution, i.e. replacing solid wood materials with new wood-based materials (made of wood particles and fibres), and also substituting wood materials with their non-wood equivalents (glass, metal, concrete etc.).

Innovative wood materials encompass mainly finished materials and products (e.g. with modern synthetic, natural or biodegradable coatings) and modified wood materials (changed by introducing into their structure different chemical agents using various technologies (the agents improve features such as: the strength properties, the resistance to exterior factors, and ageing processes) or combining various wood materials with non-wood materials such as plastics, metals, glass, and concrete, thus creating composite wood materials). The innovative nature is also a feature of purpose-made materials, both wood materials and materials with mixed structure, whose properties are closely connected with their intended function. One can list at least the following examples of innovative wood materials and products, which illustrate current trends in the wood sector:

- multilayer panels of solid wood lamellas,
- support frame panels of veneer sheets of the same orientation of the grain, flexible plywood characterised by high elasticity and easy machining, 3D veneers (i.e. three-dimensionally formed veneers), non-combustible laminated furniture panels, and veneers cut from laminated billets of the highest quality lumber,
- finishing materials for wood-based panels, for example edges (melamine edges for zero seam veneering, with deeply textured surface), furniture foil – smartfoil, UV lacquers, coloured core laminates, and thermo-melting glues.

The processes of wood finishing, such as texturing of solid wood and plywood (brushing) and whitewashing of solid wood, can also be deemed innovative.

Most often innovative wood products are multipurpose products characterised by high comfort of use and high quality, mainly regarding shape stability, durability, hydrophobic properties, fire resistance etc. They are also characterised by the growing quality of components, lightness, ergonomics, better functionality and higher durability, as well as the growing range of colours and improved design (e.g. furniture).

It can be expected that in the near future the development of modern technologies will fuel a drive toward producing wood materials and products which will be natural and individualised, meaning that production processes (e.g. 3D) will allow personalisation of a mass product.

5.0. (J) Housing and construction

In 2015 in Poland construction and assembly production increased 2.9% in real terms compared to 2014 (however, in 2014 its dynamics was 3 percentage points higher). The sale of construction works (refurbishment works) was higher than in the previous year, while the sale of investment works was lower (an increase of more than 11% and a decrease of approximately 2%, respectively). Similarly to previous years, construction of civil engineering facilities was characterised by the highest dynamics of the production growth (4% in fixed prices in relation to 2014). The sale of specialist construction works increased 2.4% and of construction works connected with erection of buildings 2.5% (in fixed prices). The up-to-date performance in 2016, however, indicates a worsening of business conditions in construction. In the opinion of entrepreneurs, currently their production capacity is used in approximately 79%. In their view, like in previous years, the main barriers to construction business are high labour costs and strong competition on the market. On the other hand, the problems connected with employing adequately skilled staff are more sensible than earlier.

In 2015 housing construction enjoyed well economic conditions. The number of dwellings completed (147.7 thou.) was 3.2% higher than in the previous year. This was a result of a 5.7% increase in the number of dwelling completed intended for sale or rental (62.4 thou.) and a 4.8% increase in the number of dwelling completed in the area of individual construction (79.8 thou.). On the other hand, the year 2015 was another one recording a drop of almost 40% in the number of dwellings completed in housing associations (2.1 thou.). On the positive side, the previous upward trend in the number of dwellings under construction (a 3% increase), dwellings whose construction was commenced (a 13.7% increase), and dwellings with issued construction permits (a 20.5% increase) continued. This allows optimistic forecasts of the development of housing construction in the near future. The number of new dwellings should rise systematically, especially that those trends are confirmed by the numbers from the first half of 2016: the number of dwellings under construction increased more than 2% in relation to the corresponding period of the last year, the number of dwellings whose construction was commenced augmented almost 8%, and the number of dwellings with issued construction permits increased almost 14%. In the near future, the development of the housing construction market may be additionally stimulated by the introduction of the new housing programme *Dwelling+*, whose aim is to fulfil the housing needs in Poland, especially those of families with many children, having low and average income.

Table 1

Economic indicators

Indicator	2010	2011	2012	2013	2014	2015
	% change on previous year					
Gross Domestic Product	103.7	104.8	101.6	101.3	103.3	103.6
Sold production of industry	109.0	107.5	100.5	101.8	104.1	104.8
Construction and assembly production	104.6	111.8	93.7	94.1	105.9	102.9
Dwellings completed	84.9	96.4	116.8	94.9	98.6	103.2
Dwellings under construction	103.3	104.5	98.5	97.5	100.7	103.0
Average paid employment						
- total	99.8	100.6	99.2	98.4	101.4	100.2
- in the enterprises sector	100.8	103.2	100.1	99.0	100.6	101.3
Registered unemployment rate (*at the end of the year*)[1]	12.4	12.5	13.4	13.4	11.4	9.8
Average monthly gross real wages and salaries						
- total	101.4	101.4	100.1	102.8	103.2	104.2
- in the enterprises sector	100.8	100.9	99.8	102.0	103.7	104.5
Price indices of consumer goods and services (*inflation*)	102.6	104.3	103.7	100.9	100.0	99.1
Investment outlays	100.2	110.6	97.2	98.8	109.5	105.7
Trade						
millions of PLN, current prices						
Exports	481058.2	558739.0	603418.6	647878.8	693471.6	750835.8
Imports	436220.6	623372.7	648127.6	656098.2	704567.5	740973.3
Balance of trade	-55162.4	-64633.7	-44709.0	-8219.4	-11095.9	+9862.5
millions of USD, current prices						
Exports	159757.6	190247.5	184660.6	206138.0	222339.4	200342.8
Imports	178062.9	212330.9	198463.4	208780.4	225898.5	197682.1
Balance of trade	-18305.3	-22083.4	-13802.8	-2642.4	-3559.1	+2660.7
millions of EUR, current prices						
Exports	120373.1	136693.9	143456.1	154994.0	165773.6	179578.2
Imports	134188.4	152568.4	154040.2	156978.0	168432.3	177232.9
Balance of trade	-13815.3	-15874.5	-10584.1	-1984.0	-2658.7	+2345.3

[1] as a ratio of registered unemployed persons to the economically active civil population

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TF1

TIMBER FORECAST QUESTIONNAIRE
Roundwood

Country: Poland | Date: 15.09.2016

Name of Official responsible for reply:
Ewa Ratajczak

Official Address (in full):
Wood Technology Institute (Instytut Technologii Drewna), 60-654 Poznań, Winiarska 1,

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Product Code	Product	Unit	Historical data 2014	Historical data 2015	Revised 2015	Estimate 2016	Forecast 2017
1.2.1.C	SAWLOGS AND VENEER LOGS, CONIFEROUS						
	Removals	1000 m^3	13 235,063	13 440	13 330,773	13 500	13 600
	Imports	1000 m^3	142,748	180 #	154,211	160	160
	Exports	1000 m^3	1 339,985	1 420 #	1 194,283	1 200	1 210
	Apparent consumption	1000 m^3	12 037,826	12 200	12 290,701	12 460	12 550
1.2.1.NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS						
	Removals	1000 m^3	3 128,004	3 130	3 070,878	3 120	3 180
	Imports	1000 m^3	99,056	120 #	94,707	95	95
	Exports	1000 m^3	133,466	140 #	136,175	140	145
	Apparent consumption	1000 m^3	3 093,594	3 110	3 029,410	3 075	3 130
1.2.1.NC.T	of which, tropical logs						
	Imports	1000 m^3	1,549	2 #	2,069	2	2
	Exports	1000 m^3	0,073	0 #	0,154	0	0
	Net Trade	1000 m^3	1,476	2	1,915	2	2
1.2.2.C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS						
	Removals	1000 m^3	13 115,216	13 640	13 650,349	14 000	14 400
	Imports	1000 m^3	1 175,205	1 350 #	1 223,373	1 230	1 240
	Exports	1000 m^3	1 081,681	1 100 #	1 022,342	1 010	1 000
	Apparent consumption	1000 m^3	13 208,740	13 890	13 851,380	14 220	14 640
1.2.2.NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS						
	Removals	1000 m^3	4 935,892	5 060	5 028,016	5 120	5 210
	Imports	1000 m^3	644,302	700 #	473,762	470	460
	Exports	1000 m^3	86,453	100 #	84,240	85	85
	Apparent consumption	1000 m^3	5 493,741	5 660	5 417,538	5 505	5 585
3	WOOD CHIPS, PARTICLES AND RESIDUES						
	Domestic supply	1000 m^3	9 320,538 N	10 000 C	9 677,798	9 900	10 100
	Imports	1000 m^3	1 800,298	1 678 C	1 778,684	1 750	1 750
	Exports	1000 m^3	910,712	660 C	854,932	860	880
	Apparent consumption	1000 m^3	10 210,124	11 018	10 601,550	10 790	10 970
1.2.3.C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS						
	Removals	1000 m^3	1 131,549 N	1 050	1 021,665	1 010	1 000
1.2.3.NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS						
	Removals	1000 m^3	131,446 N	140	120,966	110	110
1.1.C	WOOD FUEL, CONIFEROUS						
	Removals	1000 m^3	2 674,216 N	2 680	2 628,750	2 650	2 680
1.1.NC	WOOD FUEL, NON-CONIFEROUS						
	Removals	1000 m^3	2 510,652 N	2 540	2 523,572	2 540	2 560

red colour - corrected data

N - National estimate

Residues - production excluding recovered wood

Trade turnover is based only on data from the SAD document and Intrastat declaration; real data, without estimation of values of trade turnover realized by those parties which are released from the reporting obligation

Roundwood (from 2012 year): sawlogs and veneer logs and pulpwood - with removals from tress and shrubs outside the forest

Roundwood removals underbark

Please return (preferably by e-mail) to Timber Section no later than 16 September 2016.

By e-mail to stats.timber@unece.org. By fax to +41 22 917 0041

Questions? Please contact Alex McCusker at the above address or telephone +41 22 917 2880.

The historical data are from the most recent Joint Forest Sector Questionnaire (blank) or the Timber Forecast Questionnaire (#). For explanations please see cover letter.
These data are flagged with E, R, N or C for secretariat estimate, repeat, national estimate or calculated totals (from subitems). If there is no flag, this indicates officially

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TF2

TIMBER FORECAST QUESTIONNAIRE
Forest products

Country:	**Poland**	**Date:**	**15.09.2016**
Name of Official responsible for reply:			
Ewa Ratajczak			
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Product Code	Product	Unit	Historical data 2014	Historical data 2015	Revised 2015	Estimate 2016	Forecast 2017
5.C	**SAWNWOOD, CONIFEROUS**						
	Production	1000 m^3	4 232,700	4 400	4 315,003	4 450	4 570
	Imports	1000 m^3	573,186	637	646,320	690	760
	Exports	1000 m^3	637,221	699	622,206	630	640
	Apparent consumption	1000 m^3	4 168,665	4 338	4 339,117	4 510	4 690
5.NC	**SAWNWOOD, NON-CONIFEROUS**						
	Production	1000 m^3	491,986	500	520,186	530	540
	Imports	1000 m^3	244,868	296	306,780	340	360
	Exports	1000 m^3	88,537	94	92,805	95	95
	Apparent consumption	1000 m^3	648,317	702	734,161	775	805
5.NC.T	of which, tropical sawnwood						
	Production	1000 m^3	0,021	0	0,008	1	1
	Imports	1000 m^3	18,820	13	13,568	14	15
	Exports	1000 m^3	2,401	1	1,329	1	1
	Apparent consumption	1000 m^3	16,440	12	12,247	14	15
6.1	**VENEER SHEETS**						
	Production	1000 m^3	53,502	55 C	54,334	55	56
	Imports	1000 m^3	47,951	52 C	47,180	47	48
	Exports	1000 m^3	18,269	18 C	17,608	18	19
	Apparent consumption	1000 m^3	83,184	89	83,906	84	85
6.1.NC.T	of which, tropical veneer sheets						
	Production	1000 m^3	5,000 N	5	5,000	5	5
	Imports	1000 m^3	0,399	0	0,185	1	1
	Exports	1000 m^3	0,079	0	0,110	0	0
	Apparent consumption	1000 m^3	5,320	5	5,075	6	6
6.2	**PLYWOOD**						
	Production	1000 m^3	406,218	419 C	390,444	400	420
	Imports	1000 m^3	299,034	288 C	290,456	290	295
	Exports	1000 m^3	202,734	221 C	250,426	255	260
	Apparent consumption	1000 m^3	502,518	485	430,474	435	455
6.2.NC.T	of which, tropical plywood						
	Production	1000 m^3	0,932	1	1,376	2	2
	Imports	1000 m^3	25,709	26	19,668	21	22
	Exports	1000 m^3	16,755	18	17,978	17	16
	Apparent consumption	1000 m^3	9,886	9	3,066	6	8
6.3	**PARTICLE BOARD (including OSB)**						
	Production	1000 m^3	4 809,477	4 850	5 014,139	5 060	5 110
	Imports	1000 m^3	1 475,355	1 540	1 593,628	1 630	1 650
	Exports	1000 m^3	666,666	637	692,003	720	750
	Apparent consumption	1000 m^3	5 618,166	5 753	5 915,764	5 970	6 010
6.3.1	of which, OSB						
	Production	1000 m^3	434,555	460	604,254	650	700
	Imports	1000 m^3	247,172	234	201,666	210	210
	Exports	1000 m^3	224,472	208	237,858	240	250
	Apparent consumption	1000 m^3	457,255	486	568,062	620	660
6.4	**FIBREBOARD**						
	Production	1000 m^3	3 931,464	4 040 C	4 281,107	4 440	4 520
	Imports	1000 m^3	394,645	367 C	392,512	430	450
	Exports	1000 m^3	1 570,115	1 707 C	1 712,715	1 740	1 770
	Apparent consumption	1000 m^3	2 755,994	2 700	2 960,904	3 130	3 200
6.4.1	Hardboard						
	Production	1000 m^3	218,349	220	107,306	120	130
	Imports	1000 m^3	187,079	186	168,241	190	200
	Exports	1000 m^3	300,937	309	317,755	300	300
	Apparent consumption	1000 m^3	104,491	97	-42,208	10	30
6.4.2	MDF/HDF (Medium density/high density)						
	Production	1000 m^3	3 068,087 N	3 150	3 471,819	3 600	3 650
	Imports	1000 m^3	198,468	165	216,878	230	240
	Exports	1000 m^3	710,536	819	777,634	800	830
	Apparent consumption	1000 m^3	2 556,019	2 495	2 911,063	3 030	3 060
6.4.3	Other fibreboard						
	Production	1000 m^3	645,028	670	701,982	720	740
	Imports	1000 m^3	9,098	17	7,393	10	10
	Exports	1000 m^3	558,642	579	617,326	640	640
	Apparent consumption	1000 m^3	95,484	108	92,049	90	110
7	**WOOD PULP**						
	Production	1000 m.t.	1 119,659	1 099 C	1 115,234	1 118	1 120
	Imports	1000 m.t.	925,737	930 C	983,429	1 000	1 050
	Exports	1000 m.t.	171,310	160 C	181,466	185	190
	Apparent consumption	1000 m.t.	1 874,086	1 869	1 917,197	1 933	1 980
10	**PAPER & PAPERBOARD**						
	Production	1000 m.t.	4 278,384	4 368 C	4 399,344	4 510	4 580
	Imports	1000 m.t.	3 584,960	3 534 C	3 687,544	3 750	3 800
	Exports	1000 m.t.	2 206,444	2 247 C	2 165,494	2 180	2 200
	Apparent consumption	1000 m.t.	5 656,900	5 655	5 921,394	6 080	6 180
4.1	**WOOD PELLETS**						
	Production	1000 m.t.	700,000 N	720	750,000	810	860
	Imports	1000 m.t.	52,204	48	60,945	70	80
	Exports	1000 m.t.	182,545	160	206,426	220	240
	Apparent consumption	1000 m.t.	569,659	608	604,519	660	700

red colour - corrected data

[1] Sawnwood - production exluding shop lumber, with sleepers

N - National estimate

Trade turnover is based only on data from the SAD document and Intrastat declaration; real data, without estimation of values of trade turnover realized by those parties which are released from the reporting obligation

Quantity of wood pulp (product code 7) is reported in metric tonnes

Wood pulp (product code 7) - excluding pulp from fibres other than wood and excluding pulp from recovwered fibre pulp

Plywood (product code 6.2) - no bamboo plywood

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