

**THE NETHERLANDS
NATIONAL MARKET REPORT 2018**

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Institute for Forestry, Forest Products and Services, Probos
Netherlands' Paper and Board Association, Royal VNP
Netherlands' Timber Trade Association, Royal VVNH
Ministry of Agriculture, Nature and Food Quality
Ministry of Infrastructure and Water Management

1. General economic trends affecting the forest industries sector¹

Economy is flourishing

CPB (Netherlands Bureau for Economic Policy Analysis) forecasts that the Dutch economy will grow by 2.8% in 2018 and 2.6% in 2019. These rates have not been noted since the financial crises. Household consumption, public spending and business and housing investments all contribute to the growing economy. Confidence indicators both consumer and producer confidence are declining, but they are still above the multi-annual average. The announced reduction in natural gas production will reduce GDP growth by 0.1 percentage point, in both 2018 and 2019. Employment will increase and unemployment will decrease to the second lowest level of the last four decades. The tight labour market causes upward pressure on wages. Higher wage costs and the increase in the low VAT tariff will cause inflation to rise. Unemployment is expected to steadily decrease from 7.4% in 2014 to 3.9% in 2018 and 3.5% in 2019.

Exports remain an important driver

Dutch exports are growing about as strongly as relevant world trade. In particular, re-exports are continuing to increase, although domestically produced exports are growing less rapidly compared to the relevant world trade, due to the strong euro. Companies are further expanding their production capacity. The capacity utilisation is approaching its highest level since the turn of the century. The positive outlook, low capital costs and large profits are encouraging business investments. In the industrial sector, however, producer confidence has been declining since May of this year.

Strong growth in consumption

Favourable income developments lead to strong growth in consumption. The growth in employment leads to higher incomes and, thus, to more consumption. Rising wage levels, the overall reduction in the tax burden and the historically high consumer confidence level all encourage consumption. The increase in real disposable income will peak in 2018, at 2.9%. The highest level since the late 1990s. A smaller increase in employment in 2019, however, will lead to slightly less growth in spending.

Housing market

The housing industry is traditionally important for the timber industry. After the sharp decline in completed house-buildings of approximately 40% from 2008 to 2012, in recent years the situation has turned around. Partly resulting from stimulating measures of the Dutch government and also due to the low mortgage rates. The number of newly built houses completed in 2017 increased by almost 14% compared to the year before. The number of house building permits granted has increased substantially between 2016 and 2017. Due to a lack of construction sites and development capacity at municipalities and private developers further growth is not expected in the coming two years. A decrease might even be more likely.

Based on the figures of the first half of 2018, the total number of newly built houses will be approximately 66,500 this year. This is higher than last year's expectations. This prognoses by ING and Rabobank is supported by the large increase in the house building permits granted in the years before. The EIB² and the large banks (ING, ABN AMRO

¹ <https://www.cpb.nl/sites/default/files/omnidownload/CPB-Policy-Brief-2017-08-Juniraming-2017.pdf>

²Economisch Insitituut voor de Bouw (Economic Institute for Construction)

and Rabobank) expect this production will continue to increase, but at a lower level starting from 2019. The main reason for this are the stagnating number of building permits granted and shortages in the availability of skilled personal and building materials.

2. Policy measures influencing timber trade and marketing

Sustainable procurement policy

In the view of the Dutch government, public procurement of sustainably produced timber is very important to give timber producing countries a clear signal regarding consumers' willingness to purchase sustainably produced products at reasonable prices and thus increase such purchases. It also sets an example for semi-governmental organisations and the private sector to introduce sustainably produced timber in their procurement criteria and by doing so, contribute to sustainable forest management.

In June 2008 the Dutch national government established its sustainable procurement policy. By implementing this policy the government intended to increase the use of sustainably produced products. Therefore all governmental organisations must use sustainability as an important criterion when purchasing goods. This way the Dutch government intends to stimulate the market for sustainable products and promote innovation within companies. Clear goals were set. As of 2010 the Dutch government has the ambition that all timber procured by central government should come from a sustainable source. Municipalities and provinces were aiming at 100% by 2015.

Part of the sustainable procurement policy is a set of criteria for sustainably produced timber, the Dutch Procurement Criteria for Timber. Based on these criteria the government can assess whether the offered timber is produced sustainably. The Timber Procurement Assessment Committee (TPAC) is responsible for the assessment of certification systems for sustainable forest management according to the Timber Procurement Assessment System (TPAS). TPAC advises the Dutch Ministry for Environment and Infrastructure. The minister decides on the final acceptance. Information on the TPAS criteria and the TPAC judgements can be found on the TPAC website (www.tpac.smk.nl).

The website www.inkoopduurzaamhout.nl has been set up to support procurers and suppliers in their efforts to procure or supply sustainably produced timber.

EU Timber Regulation

Until February 2017 over 200 inspections have taken place at 195 operators by the Dutch Competent Authority, the NVWA. Due to strict enforcement, the implementation of the EUTR by the private sector has increased and increasingly impacts further processed wood products.

Sustainable Energy Agreement

The Dutch Ministry of Economic Affairs agreed with key stakeholders like energy producing companies, environmental groups on promoting sustainable energy so that by 2020 the share of sustainable energy should reach 14% of the total domestic energy consumption. As energy from wind and sun are not able to meet this share, a significant part must come from solid biomass, among which imported wood pellets. To qualify for subsidy the biomass used for large scale energy production must apply to a comprehensive set of sustainability requirements including sustainable forest management, greenhouse gas reduction and carbon debt³.

³ <http://english.rvo.nl/subsidies-programmes/sde/sustainability-criteria>

Climate agreement

In the summer of 2018 the Social Economic Council of the Netherlands (SER) in The Hague announced the main concepts of the Climate Agreement, which must be finished by the end of this year. Chair Ed Nijpels of the Climate Council presented the document to Minister Wiebes of Economic Affairs and Climate. Firm commitments have already been made on a number of subjects, and although the plans need detailing in most areas, the direction is clear.

As is often the case when facing major challenges, the Netherlands has used the consensus-based polder model here. Authorities, companies and interest groups are meeting at five so-called climate tables to try to reach agreements that will result in at least a 49% reduction in CO₂ emissions by 2030. Optimists are even hoping for a 55% reduction. The underlying aim is compliance with the Paris Climate Agreement, in other words a maximum 2-degree temperature increase compared to 1990, and preferably just 1.5 degrees.

The five tables are: Electricity, Built Environment, Industry, Agriculture & Land Use, and Mobility. The forestry- and timber sector is covered by the sector table Agriculture & Land Use. A specific sub-table titled ‘trees, forests and nature’ is dedicated to the optimization of the contribution of forest and nature (including the timber- and other related sectors) to reach the climate goals, but to also play its role in climate change mitigation. Budget has been made available by the government to develop tools that can be used within the sector to optimize the contribution of the sector. Ranging from establishment of new forests to increasing the use of (domestic) timber in for instance the construction sector.

Forest and Wood Action Plan

Forest and timber organisations, in collaboration with NGO’s and other sectors, have drawn up an Action Plan on Forests and Timber, on the contribution to the green economy. The plan proposes to intensify the roundwood harvesting in a sustainable way, to plant new forests, and to use more timber in construction. This plan was presented at the National Climate Summit in October 2016 and received support from the Dutch Prime Minister and state secretary of the ministry of the Environment and Infrastructure. Currently the first activities have started as part of the Action Plan, e.g. in the field of Climate Smart Forestry. Other opportunities are being explored.

Netherlands Circular in 2050

The outcome of latest Dutch government climate change and wider environmental policy decisions could be increased market opportunity for wood. The country’s aim is to create a truly ‘circular economy’ over the next 30 years, with the stress on using products and materials that can be re-used, recycled and ultimately disposed of in an environmentally sound way. To this end the government submitted the policy paper ‘Netherlands Circular in 2050’ to the House of Representatives in 2016. In the follow up of this policy ambition the National Agreement on the Circular Economy⁴ has been signed by more than 300 businesses and social partners like NGO’s. Currently concrete steps are being developed with representatives of five selected economic sectors, like the construction sector and the biomass and food sector.

⁴ <https://circulair economienederland.nl/grondstoffenakkoord/documenten+grondstoffenakkoord/handlerdownloadfiles.ashx?idnv=702477>

Covenant Sustainable Forest Management

In March 2017 the covenant Promoting Sustainable Forest Management (Bevorderen Duurzaam Bosbeheer) has been signed by 32 representatives of the timber industry, the construction, furniture and retail branch organizations, trade unions, civil society organizations and the Dutch government in the presence of Dutch Minister for Foreign Trade and Development Cooperation, Lilianne Ploumen. The covenant brings together key public, private, civil society and knowledge sector partners – all needed to scale market demand for sustainably produced forest products. The covenant builds on the previous ‘Green Deal’ Sustainable Forest Management. Signatories pledge to encourage sustainable forest management through procurement and promotion of sustainably sourced timber and wood products. Minister Ploumen said: “This covenant is an important step in the right direction. In 2020, the use of sustainably produced timber should be norm, and conditions for conducting business responsibly at a global scale should be in place. This will lead to environmental and working conditions improvements in the producing countries.”

3 Developments in Dutch forest products markets sectors

a) Wood raw materials

Removals from the Dutch forests and other wooded area's in 2017 are estimated as 2,300,000 m³ under bark in total. A slight decrease of 1.1% compared to 2016. Industrial roundwood has a share of 38% within the total removals. Consumption of industrial roundwood decreased by 21% due to the closure of the largest sawmill in the Netherlands. The share of export within the total removals of industrial roundwood in the Netherlands was 61% in 2017. The export of pulpwood has a share of almost 66% in the total exports of industrial roundwood.

b) Wood energy

The share of renewable energy in the Netherlands increased from 6.0% in 2016 to 6.6% in 2017⁵. This increase of 0.6 percentage point is mainly caused by an increase in the production of renewable energy from biomass and windmills. Based on the current trend and the expected future developments the Dutch National Energy Outlook will increase substantially in the coming years, but the aim of 14% renewable in 2020 won't be met. The aim of 16% in 2023 is however expected to be reached⁶.

Total consumption of energy from biomass increased by 7.6% in 2017 compared to 2016. Biomass has a share of 61% within the total consumption of renewable energy in 2017. It is mainly used in the production of electricity and heat in waste incinerations, domestic heating and as biofuel for road transport. The co-firing of biomass in utilities was one of the main producers of renewable energy from biomass. This co-firing of biomass (pellets) in utilities has however been substantially reduced due to a temporary end of the subsidy scheme. As a result the total share of biomass within the total production of renewable energy in the Netherlands has reduced, but it will probably regain position if the utilities start co-firing again (see section 3h as well).

If waste incineration is excluded the biomass fuels for the production of heat and energy can be generally categorized as wood chips and -shreds/shrips, agricultural residues, residuals from the food and snack industry, bio-oil and animal waste. In 2017 app. 25% of the renewable energy produced in the Netherlands was derived from woody biomass. approximately 3 million ton (fresh) of woody biomass was estimated to be used for the production of energy and heat in the Netherlands. The majority of this volume was produced in the Netherlands.

c) Certified forest products

The market share of certified primary timber products (sawn wood and wood-based panels) on the Dutch market in 2015 was 83.3%, which corresponds to a volume of 4.49 million m³ roundwood equivalents under bark. This concerns primary timber and timber products (sawnwood and wood based panels) that meet the Dutch Procurement Criteria for Timber. Differences between the product groups are large. While sawn softwood and wood-based panels both have a market share of respectively 85.5% and 88.2%, sawn tropical hardwood (63.2%) and sawn temperate hardwood (33.7%) are lacking behind⁷.

Results from an internal monitoring system of the Netherlands Timber Trade Association for the year 2017 indicates growth continues.

5 <https://www.cbs.nl/nl-nl/nieuws/2018/22/aandeel-hernieuwbare-energie-naar-6-6-procent>

6 <https://www.cbs.nl/en-gb/news/2017/42/the-hurdle-race-for-the-energy-transition>

7 <http://probos.nl/bosberichten-2017/1379-dutch-sustainably-sourced-timber-consumption-grows-to-83-in-a-decade>

d) Sawn softwood

After a period of decreasing imports and consumption since 2007 (see figure 2), the sawn softwood market in the Netherlands recovered in 2015 and this recovery continues. The imports and consumption for the year 2017 do show an increase of almost 6%. Imports of rough sawn softwood timber increased by 6%, while imports of further processed (planed) sawn softwood timber increased by 4%. Rough sawn softwood has a share of 59% of the total softwood import (Table 2). Stocks remained at a low level and are expected to stay at this level in the coming years. Although they will move slightly upwards in line with a developing market.

Table 1
Key facts of the Dutch sawn softwood market x 1000 m³

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Domestic Production	159	144	104	169	137	159	163	129	126	
Net Imports	2,227	1,988	2,145	2,120	1,861	1,779	1,789	1,987	2,162	
Stock Change	-32	-25	-50	0	-50	0	0	10	5	
Apparent Consumption	2,418	2,157	2,299	2,289	2,048	1,938	1,952	2,106	2,111	

Sources: Statistics Netherlands (CBS) / Netherlands Timber Trade Association (Royal VVNH)/ Probos

Table 2
Sawn softwood imports (volume in m³)

Countries	2015				2016				Sawn	Planned
	Sawn	Planned	Total	%	Sawn	Planned	Total	%		
1 Sweden	227.500	437.677	665.177	27%	251.833	451.195	703.028	27%	11%	3%
2 Germany	282.004	275.960	557.964	23%	293.372	287.086	580.458	22%	4%	4%
3 Russia	280.085	48.612	328.697	13%	279.910	62.536	342.446	13%	0%	29%
4 Finland	209.115	34.067	243.182	10%	232.420	43.686	276.106	11%	11%	28%
5 Latvia	99.668	50.841	150.509	6%	79.191	67.647	146.838	6%	-21%	33%
6 Belgium	55.638	41.087	96.725	4%	78.505	54.780	133.285	5%	41%	33%
7 Belarus	94.120	3.202	97.322	4%	128.135	3.106	131.241	5%	36%	-3%
8 Estonia	34.832	34.002	68.834	3%	26.401	30.908	57.309	2%	-24%	-9%
9 Ukraine	29.452	625	30.077	1%	36.882	2.910	39.792	2%	25%	365%
10 Poland	15.156	15.105	30.261	1%	19.481	18.842	38.323	1%	29%	25%
Other (*)	113.875	94.536	208.411	8%	108.034	58.426	166.460	6%	-5%	-38%
Total	1.441.444	1.035.715	2.477.160		1.534.165	1.081.121	2.615.286		6%	4%

* Other: This group consists of 27 countries with exports to the Netherlands of less than 35,000 m³

(Source: CBS trade statistics edited by Probos and international trade statistics of Sweden, Germany, Finland, Letland and Estonia)

The order of the top ten countries for softwood import in the Netherlands hasn't changed much between 2015 and 2016 (table 2). Sweden and Germany remain by far the foremost suppliers of softwood timber to the Netherlands. The total import volume from Sweden increased by 6% compared to last year. The imports from Estonia dropped substantially, but an analysis of the trade statistics over the period 2012-2017 shows that 2016 was an exceptional year considering the imported volume from Estonia.

e) Sawn hardwood (temperate and tropical)

The consumption of hardwoods in the Netherlands has shown a gradual decrease from the beginning of the 21st century. In 2017 the situation seems to have turned around. Due to a strong increase of temperate (about +38%). In 2018 the market is expected to show a slight increase in consumption and stabilisation is expected for 2019. The share of further processed/optimized tropical sawnwood keeps increasing in the Dutch joinery industry resulting in more demand for timber from Asian producing countries.

The prospects within the Dutch market for (tropical) hardwoods are a lot better than in the years before. The construction sector is recovering. The gardening sector benefits of this recovery as well, though with some delay. The market for temperate hardwoods is expected to

benefit from the recovery of the construction sector and the housing market from 2017 onwards. As interior products and furniture are bought at the end of the construction cycle there is a delay compared to tropical timber used in construction. European oak is by far the most popular species within the temperate hardwoods. There is a huge demand for European oak, with almost daily price increases. The more recent increase in the consumption of temperate hardwood is caused by an increased demand from the packaging industry. This industry moves away from the more expensive softwood and imports so called mixed hardwoods from for instance the Baltic states.

According to Statistics Netherlands the turnover of the timber industry increased in the second quarter of 2017 by 3.1% compared to the second quarter of 2016. Prices were 2.4% higher compared to 2016. The timber and construction materials industry deals with increased prices for 14 quarters in a row. Statistics Netherlands mentions in august 2017 that all sectors are positive about their prospects, but for the ninth month in a row, the producers in the timber and construction materials industry are most positive of all.

The Dutch market for tropical hardwoods can be subdivided into two submarkets: 1) the construction sector, DIY and garden and 2) the market for waterworks (civil engineering). The first submarket is growing due to the recovery of the construction sector. However, the growth is not (yet) in line with the strong recovery of the number of permits for new houses. This is due to the fact that due to the recession contractors have difficulties finding enough (skilled) workers, delivery times of the concrete sector have increased (not enough capacity). Work is therefore postponed. Timber traders and processors therefore expect the demand for timber to grow. Timber might also benefit from the increased environmental awareness among consumers and architects. Although competition with other building materials is still heavy, timber seems to recover market share. E.g. in renovation, where now and then PVC plastic is replaced by timber. Increasingly new Life Cycle Analyses studies are published⁸. The demand for civil engineering lacks behind. This sector has suffered less during the crises, due to governmental investments. As a result, the market does not recover as it does in the construction sector. The sector drafted an Action Plan to encourage the use of timber in civil engineering.

Table 3

Key facts of the Dutch sawn hardwood market

	x 1000 m ³									
Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Domestic Production	84	66	59	69	53	59	66	56	58	60
of which tropical	18	12	10	11	7	5	11	7	6	6
Net Imports	469	310	321	268	276	231	201	224	230	279
of which tropical	349	239	229	196	194	172	148	156	136	131
Apparent Consumption	553	376	380	337	329	290	267	280	288	339
of which tropical	367	251	239	207	201	177	159	163	142	137

Sources: Probos, Statistics Netherlands (CBS)

f) Pulp and paper

The production and turnover within the Dutch paper and board industry substantially increased between 2016 and 2017. The total paper production increased with 11.7% to almost 3.0 million m.t. accounting for 90.9% of the total production capacity. The production capacity in the Netherlands has increased slightly with 1.5%. The turnover increased with 9.8% to EUR 1,859 million. The increase in production is much higher than the CEPI members average. Signs for the near future are positive. Besides general developments like increased demand for packaging materials, which makes up 73% of the production of the Dutch paper and paper board industry,

⁸ <http://www.europeansttc.com/environment/>

another reasons is that the paper and board industry in the Netherlands is one of the leading sectors in recycling and energy reduction. This is due to the large collection of waste paper by consumers and the biobased production process. Export accounted for 80% of the total production. Germany remains the most important export country (28.6%), followed by Belgium (10.0%), the UK (9.8%) and France (9.8%).

Paper and board producing factories in the Netherlands almost solely produce paper and board from recovered paper and/or imported pulp. From the total of 22 factories in the Netherlands there is only one factory that is producing mechanical wood pulp for the production of board for folding boxes. The species used are Poplar and Norway spruce. Next to virgin fibres, this factory also consumes recovered paper.

In 2017 76.7% of the imported market pulp was certified sustainably (FSC or PEFC) sourced. A slight increase compared to 2015.

Table 4
Fibre furnish of the Dutch paper and board industry X 1,000 m³ round wood equivalents under bark

Year	2010	2011	2012	2013	2014	2015	2016	2017
Cellulose	2,524	2,233	2,701	2,496	2,611	2,275	11,196	2,356
Recovered paper	7,170	7,017	6,955	7,170	7,179	7,254	7,426	8,560
Total fibre input	9,694	9,250	9,656	9,666	9,790	9,529	18,623	10,917

Source: Probos and Royal VNP

In 2017 the total number of employees in the paper and board industry slightly decreased by 0.6% compared to 2016 and reached the number of 3,809 employees. As a result of improving labour productivity in the last decade and closure of mills, the number of employees in the industry in the Netherlands already decreased by almost 33% since 2005. This refers to personnel operating the paper and board producing machinery.

In 2004 the Dutch paper and board industry, together with the Ministry of Economic Affairs, launched the Energy Transition in the Paper Production Chain. The aim of this program is: “To halve the energy consumption per unit end product in the production chain by 2020”. This challenge is translated by relating energy savings with reduction of CO₂-emissions, cost efficiency, international competition and re-use of raw materials. In 2009 a new energy agreement has been signed between the paper and board industry and the government. The aim of this agreement is to improve the energy efficiency in production and the value chain. The results for 2017 show that the Dutch paper and board industry has realised an energy efficiency improvement in the production chain and -process of 28% compared to 2009. Indicating that the industry is on schedule to meet the goal of 50% energy reduction in 2020. In 2013 the Energy Transition goals were incorporated in the new innovation agenda Creating Sustainable Fibre Solutions 2014-2020 (CSF). The Dutch industry agreed to achieve these goals by:

1. Raw materials of the future: Launch of three paper and cardboard products based on local bio based raw materials in order to close local cycles in a sustainable manner;
2. Towards a sustainable energy supply: Realization of sustainable energy supply for several paper and board mills, independent of natural gas;
3. High performance materials: Market introduction of a variety of paper and board products with entirely new features (active, intelligent and high performance materials (light weight, stronger, whiter, thermos isolating and electro conductive).

Table 5*Recent developments of the Dutch paper and board industries*

	2009	2010	2011	2012	2013	2014	2015	2016	2017
Change in production in %:									
Thermo-mechanical pulp (integrated)	-45 ²⁾	-19	-65	15	3.1	8	0%	2.3%	2.3%
Graphic papers	-41 ²⁾	-11	5	1	-0.4	0	4%	-100% ³⁾	-3.3%
Case materials	-7	16	-2	4	3.5	0	1%	4.3%	30.1%
Other packaging paper and board	-7	15	0	5	3.3	2	4%	-22.4%	4.8%
Sanitary & household	3	-2	3	2	0	-6	-3	-0.1	0.0%
Total paper & board	-12	10	-4	1	1.1	-1	-4	1.1	11.7%
(Turnover [million Euro])	1,493	1,777	1,746	1,813	1,786	1,809	1,737	1,693	1,859
Price change of production of paper and board industries	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.	n.a.

Source: Royal VNP

¹⁾ Due to closure of 3 mills during 2007 and closure of one machine on another production location.²⁾ The production of Norske Skog Parenco changed from newsprint to magazine paper grades based solely on recovered paper.³⁾ The production of Parenco is now included in (Other) graphic papers.

h) Wood pellets

The production of wood pellets slightly decreased in 2017 and reached a quantity of 243,000 m.t. (-1%). 64% of this quantity is exported. Especially to Germany. The imports of wood pellets have more than doubled to 245,000 m.t. in 2017. But this is still much lower than the imports of 1.6 million m.t. in 2010. This reduction is mainly driven by a reduction in co-firing by the large utilities. In general, the decreased co-firing of wood pellets is caused by the end of most of the MEP grants in the period 2012-2014⁹ and a fire in one of the utilities that co-fired a large quantity of wood pellets.

As none of the utilities have been able to acquire SDE+ grants¹⁰ the co-firing of wood pellets dropped to (almost) zero in the period 2015-2017. It was expected that by September 2017 the first wood pellets might be co-fired again, but this didn't happen. New SDE+ grants have been granted to 3 companies who manage 4 co-fired utilities which are or will be converted to be able to co-fire wood pellets. One utility is almost converted and ready for production. The other 3 utilities need to be converted first. It is expected co-firing should be in production to some extent by the end of 2018. That said, imports might increase strongly soon as the utilities will start to build their stocks. There were however no signs of increased imports in the first 7 months of 2018.

For co-firing all grants within the SDE+ have been granted. However, there are still grants available to produce industrial steam by firing wood pellets and a. So far, just two companies received a grant and more will follow. This will result in an extra demand for wood pellets by the Netherlands. In addition to this starting from 2018 the subsidy scheme has been adjusted allowing for more use of wood pellets as energy source. This adjustment is the result of the fact that the domestic availability of green wood chips will become limiting for further development of the energy production from woody biomass in the near future. As a result the demand for wood pellets is expected to increase from 2020.

⁹ <http://www.bioenergytrade.org/downloads/iea-task-40-country-report-2014-the-netherlands.pdf>¹⁰ With the SDE + subsidy scheme the Ministry of Economic Affairs encourages the development of a sustainable energy supply in the Netherlands. Businesses and (non-profit) institutions who (will) produce renewable energy, can utilize the SDE +.

5. Tables

A. Economic indicators for the Netherlands

Change in %, unless otherwise specified	2014	2015	2016	2017	2018	2019
GDP	1.0	2.3	2.2	2.9	2.8	2.5
Private consumption	0.0	2.0	1.1	1.9	2.7	2.3
Private gross fixed investment (excl. housing)	2.7	10.0	-15.9	5.5	4.2	3.4
Exports of goods and services	4.0	6.5	1.7	5.3	3.0	4.2
Imports of goods and services	4.0	8.4	-2.0	4.9	3.3	4.8
Consumer Price Index (inflation)	0.3	0.2	0.1	1.3	1.6	2.4
Labour share in enterprise income (in level %)	79.4	72.2	73.6	73.4	73.6	74.3
Active labour force	-0.4	1.0	1.3	2.1	2.1	1.4
Unemployment level, % of labour force ¹	7.4	6.9	6.0	4.9	3.9	3.5
EMU-debt level (ultimo year, in % GDP)	68.2	64.6	62.0	57.1	52.8	49.2
EMU-balance level (in % GDP)	-2.4	-2.1	0.0	1.2	0.7	0.9

Source: CPB (Netherlands Bureau for Economic Policy Analysis)

¹ According to the international definition

B. Forest products production and trade in 2017, 2018 and 2019

Product Code	Product	Unit	Estimate		Forecast
			2017	2017	2018
1.2.1.C	SAWLOGS AND VENEER LOGS, CONIFEROUS				
	Removals	1000 m ³	273	270	270
	Imports	1000 m ³	42	40	40
	Exports	1000 m ³	106	150	150
	Apparent consumption	1000 m ³	209	160	160
1.2.1.NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS				
	Removals	1000 m ³	89	90	90
	Imports	1000 m ³	86	90	90
	Exports	1000 m ³	69	70	70
	Apparent consumption	1000 m ³	106	110	110
1.2.1.NC.T	of which, tropical logs				
	Imports	1000 m ³	18	9	9
	Exports	1000 m ³	4	1	1
	Net Trade	1000 m ³	14	8	8
1.2.2.C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS				
	Removals	1000 m ³	299	300	300
	Imports	1000 m ³	47	40	40
	Exports	1000 m ³	223	225	225
	Apparent consumption	1000 m ³	123	115	115
1.2.2.NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS				
	Removals	1000 m ³	182	180	180
	Imports	1000 m ³	4	4	4
	Exports	1000 m ³	125	105	105
	Apparent consumption	1000 m ³	62	79	79
3 + 4	WOOD RESIDUES, CHIPS AND PARTICLES				
	Domestic supply	1000 m ³	988	970	971
	Imports	1000 m ³	468	480	480
	Exports	1000 m ³	407	400	400
	Apparent consumption	1000 m ³	1.049	1.050	1.051
1.2.3.C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS				
	Removals	1000 m ³	14	14	14
1.2.3.NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS				
	Removals	1000 m ³	7	7	7
1.1.C	WOOD FUEL, CONIFEROUS				
	Removals	1000 m ³	409	400	400
1.1.NC	WOOD FUEL, NON-CONIFEROUS				
	Removals	1000 m ³	1.886	1.900	1.900

5.C	SAWNWOOD, CONIFEROUS		2016	2017	2018
	Production	1000 m ³	110	85	85
	Imports	1000 m ³	2.615	2.700	2.700
	Exports	1000 m ³	428	400	400
	Apparent consumption	1000 m ³	2.297	2.385	2.385
5.NC	SAWNWOOD, NON-CONIFEROUS				
	Production	1000 m ³	60	62	62
	Imports	1000 m ³	351	350	350
	Exports	1000 m ³	72	70	70
	Apparent consumption	1000 m ³	339	342	342
5.NC.T	of which, tropical sawnwood				
	Production	1000 m ³	6	6	6
	Imports	1000 m ³	167	175	180
	Exports	1000 m ³	36	36	36
	Apparent consumption	1000 m ³	137	145	150
6.1	VENEER SHEETS				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	41	42	42
	Exports	1000 m ³	6	6	6
	Apparent consumption	1000 m ³	35	36	36
6.1.NC.T	of which, tropical veneer sheets				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	11	11	11
	Exports	1000 m ³	1	1	1
	Apparent consumption	1000 m ³	10	10	10
6.2	PLYWOOD				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	632	660	660
	Exports	1000 m ³	83	80	80
	Apparent consumption	1000 m ³	549	580	580
6.2.NC.T	of which, tropical plywood				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	106	112	112
	Exports	1000 m ³	33	35	35
	Apparent consumption	1000 m ³	73	77	77
6.3	PARTICLE BOARD (including OSB)				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	617	620	620
	Exports	1000 m ³	103	100	100
	Apparent consumption	1000 m ³	514	520	520

6.3.1	of which, OSB		2015	2016	2017
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	135	140	140
	Exports	1000 m ³	7	10	10
	Apparent consumption	1000 m ³	128	130	130
6.4	FIBREBOARD				
	Production	1000 m ³	29	35	35
	Imports	1000 m ³	536	535	535
	Exports	1000 m ³	148	145	145
	Apparent consumption	1000 m ³	417	425	425
6.4.1	Hardboard				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	46	45	45
	Exports	1000 m ³	6	5	5
	Apparent consumption	1000 m ³	40	40	40
6.4.2	MDF (Medium density)				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	419	420	420
	Exports	1000 m ³	136	135	135
	Apparent consumption	1000 m ³	283	285	285
6.4.3	Other fibreboard				
	Production	1000 m ³	29	35	35
	Imports	1000 m ³	71	70	70
	Exports	1000 m ³	6	5	5
	Apparent consumption	1000 m ³	94	100	100
7	WOOD PULP				
	Production	1000 m.t.	37	35	35
	Imports	1000 m.t.	1.352	1.300	1.300
	Exports	1000 m.t.	1.045	995	995
	Apparent consumption	1000 m.t.	344	340	340
10	PAPER & PAPERBOARD				
	Production	1000 m.t.	2.983	3.070	3.095
	Imports	1000 m.t.	2.439	2.450	2.450
	Exports	1000 m.t.	2.521	2.490	2.470
	Apparent consumption	1000 m.t.	2.901	3.030	3.075
4.1	WOOD PELLETS				
	Production	1000 m.t.	243	260	260
	Imports	1000 m.t.	245	500	500
	Exports	1000 m.t.	159	160	160
	Apparent consumption	1000 m.t.	329	600	600

