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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 2014 in Poland, the process of economic activity growth continued. GDP dynamics was twice higher than the year before and equalled 3.4%. Unlike in previous years, the economic growth was mostly influenced by domestic demand, not export (whose dynamics was almost 4 percentage points lower than import's dynamics). The growth of domestic demand was 4.9% in real terms (whilst it was only 0.4% in 2013), including consumption growth of 3.4% (it was 1.4% the year before). The increase in demand was mainly a derivative of investment dynamics (the increase in gross outlay on fixed assets equalled 9.2%, compared to 1.1% in 2013) and individual consumption in the household sector (which increased 3.1%, compared to 1.2% in 2013). The high dynamics of investments resulted from, inter alia, the use of production capacity, which was greater than in the previous year, and a slow improvement of situation on the labour market, which was conducive to the growing dynamics of individual consumption. Gross value added increase was 3.2% (compared to 1.8% in 2013), whilst in industry it equalled 4.1%, and in construction 4.7%.

Analysis of the current macroeconomic situation allows an optimistic assessment of the prospects of the economic growth in Poland. It is assumed, that in 2015 GDP growth rate will remain at a level of 3.4%, and in 2016 will reach 3.8%. Domestic demand will still be the main growth factor (according to the forecasts, in the years 2015-2016 its growth will equal 3.7% and 4%, respectively). The investment demand from the private sector will depend on the anticipated improvement in economic conditions outside Poland's borders and a relatively low capital cost (thanks to low interest rates). In the period 2015-2016, forecasted investment growth rate is to be 8.6% and 7%, respectively, in real terms. It is anticipated, that the share of export in GDP will grow, but slower than in previous years (in 2015, net contribution of export to GDP may still be negative and equal -0.6 percentage points).

In 2014, dynamics of sold production of industry was 1.3 percentage points higher than in 2013 and equalled 3.1%, in real terms. In manufacturing it was 4.3% (compared to 1.9% in 2013). This had a bearing on the increase in labour productivity in industry (measured by production per 1 employed), which exceeded 2%. In the wood sector, sold production dynamics was higher than an average in industry in general and in manufacturing, and equalled 6% in the wood industry, 4.9% in the pulp and paper industry and paper processing industry, and 13.7% in the furniture industry (in 2014 the furniture industry was one of the industries with the highest production growth dynamics in Poland). Sold production of wood industries (PLN 106.7 bn) amounted to 8.7% of sold production of industry and 10.1% of sold production of manufacturing. The production structure of the wood sector was dominated by the furniture industry with a share of 34.1%, whilst the share of the wood industry was 32.8%, and of the pulp and paper industry (including paper processing) 33.1%. The current results for 2015 indicate, that the upward trends in sold production in the entire industry and manufacturing, as well as in the wood industries, have continued. It is assumed, that in the period 2015-2016 sold production of industry and manufacturing may increase approximately 4-5% annually, in real terms. In the wood sector this increase should be higher and, depending on the industry, it may range from 5-7% (in the wood industry and the pulp and paper industry and paper processing) to 15% (in the furniture industry).

In 2014, the revival of the economy was also noticeable on the labour market. At the end of the year, registered unemployment rate decreased to 11.5% (from 13.4% in the previous year). A decrease was recorded for the first time since 2009. At the same time, a 1% increase in average employment in the economy was recorded (from 9.5 to 9.6 million people), including a less than 2% increase in industry (to 2.7 million people), and an approximately 3% increase in manufacturing (to 2.2 million people). In 2014, average

employment in the wood sector was almost 341 thou. people and was more than 3% higher than the year before. Whilst employment in forestry remained at the level of the previous year (39.5 thou. people), in the wood sector its increase was almost 4% in relation to 2013 (to 301 thou. people). The highest growth of employment was observed in the furniture industry (almost a 6% increase; the furniture industry was also one of the industries, which recorded the greatest changes of the employment level in 2014 in Poland). The employed in the entire wood sector accounted for 11.2% of average employment in industry in general and 13.4% of average employment in manufacturing. The employment structure of the wood sector is dominated by the furniture industry with the share of 48%, followed by the wood industry, whose share is approximately 34%, and the pulp and paper industry (including paper processing) with the share of 18%. Due to the observed revival of economic activity, it is anticipated that in the near future situation on the labour market in Poland will further improve. The unemployment rate should further decrease to 10.5% at the end of 2015 and 9.7% in 2016. This should be accompanied by an increase in employment in the economy at a level of 1% annually in the period 2015-2016 (in the company sector the increase should exceed 1% annually). Positive trends should also continue on the labour market in the forestry-wood sector (employment increase of approximately 2-3% annually; whilst the highest increase should be observed in the furniture industry – more than 5% annually). The anticipated growth of employment in the wood sector may be higher than in the entire industry and manufacturing, where it is estimated to equal 1-2% annually.

In 2014, the increase in demand, mainly in the European Union member states, resulted in a growth of Polish exports to PLN 693.5 bn (\$ 222.3 bn, € 165.8 bn), a 6.7% increase in real terms. On the other hand, growing domestic demand in Poland intensified imports, which increased to PLN 704.6 bn (\$ 225.9 bn, € 168.4 bn), a 10.4% increase, in real terms. However, the higher dynamics of imports than of exports resulted in an increase in negative foreign trade balance to PLN -11.1 bn (\$ -3.6 bn, € -2.7 bn). The main foreign trade partners of Poland are the European Union states. In 2014, exports to the EU market accounted for 77.5% of total value of exports, and imports from the EU exceeded 59% of total imports' value. For many years, wood and products of its processing have played an important role in Polish foreign trade. In 2014, they accounted for approximately 9% of total exports' value and almost 4% of total imports' value. Furniture is one of the most important product groups in Polish exports (it accounted for 4.7% of its value in 2014). Exports of wood and wood products (PLN 61.7 bn, \$ 19.5 bn, € 14.7 bn) were more than twice as high as their imports (PLN 26.4 bn, \$ 8.4 bn, € 6.3 bn). 84% of exports of wood and wood products came to the European Union market. Poland's imports from the EU states amounted to 82% of imports of wood and wood products. In the period 2015-2016, further growth of exports (of 6.8% and 6%, respectively; in real terms) and imports (of 7.5% and 6.5%, respectively) is anticipated. Slowing down the import dynamics should contribute to slow decrease in negative balance of Polish foreign trade.

In 2014, price index of consumer goods and services remained unchanged compared to the previous year (whilst its increase was 0.9% in 2013). On the one hand, its value was the result of reduction of prices, mainly food prices (resulting from huge supply of agricultural products and Russian embargo on Polish food) and energy raw material prices. On the other hand, it was influenced by the increase in prices of goods and services related to maintenance of dwellings and prices of alcoholic beverages and tobacco products. It is anticipated that in 2015 prices of goods and services will demonstrate a downward trend (deflation will be observed), and in 2016 inflation will stand at 1.7%.

It is expected, that economic activity in Poland will continue to grow in the near future. However, this will largely depend on economic and political situation on the European markets, both the EU markets (development of the economic and public finance crisis in

Greece) and eastern markets (the conflict between Ukraine and Russia), as well as on situation in the Middle East and North Africa (solution to the migration issues). The prospects for the economic growth in Poland will also be affected by worsening economic condition of China and the anticipated growth of the US economy.

## **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**

Similarly to previous years, Poland, fulfilling its obligation of a EU member state, has updated the *Convergence Programme*, which since 2014 has been part of the *Multiannual Financial Plan*. The effective *Multiannual Financial Plan for the period 2015-2018* presents not only a forecast of basic macroeconomic variables and fiscal indices by 2018 (contained in the *Convergence Programme. Revision 2015*), but also the main objectives of the economic policy of the government and actions to be taken in this period to implement this policy. These actions are aimed at, inter alia, reduction of the deficit in the sector of government and self-government institutions in relation to GDP from 3.2% in 2014 to 1.2% in 2018, which is to be a key factor of macroeconomic stabilisation, facilitating a proper growth rate in medium and long term. The fact that in June 2015 the EU Economic and Financial Affairs Council (Ecofin) has closed the Excessive Deficit Procedure regarding Poland (which was effective for the last 6 years), is favourable to these actions. This means that Poland entered the path of public finance consolidation and reduction of excessive debt.

The forestry-wood sector is also affected by the instruments and tools contained in the 5<sup>th</sup> edition of the *National Programme of Reforms for the implementation of "Europe 2020" strategy. Revision 2015/2016*. The program describes, how Poland will achieve the goals of "Europe 2020" strategy in the period 2015-2016 as regards employment, outlay on R&D, energy and climate, education, and combating poverty and social exclusion. The current edition of the programme envisages the courses of action defined in the original version of the document. These actions concern catching up on the development and building new competitive advantages in three priority areas: infrastructure for sustainable development, innovativeness for intelligent growth, and activity for the growth favourable to social inclusion. In the near future, actions taken within the framework of this programme are to support, inter alia, the development of clusters and a system of services rendered by innovation centres, as well as initiatives connected with business environment development.

Changes in the tax system, which are important for entrepreneurs, are contained in the document entitled *Actions enhancing the observance of tax regulations and effectiveness of tax administration in the period 2014-2016*. This document defines a list of actions for the period 2014-2017, describing their goals, tools, recipients and estimated positive effects on the public finance sector. The aim of these actions is better collectability of taxes and improved process of tax debt enforcement. The document also envisages promotion of civic attitudes and educational actions. Also a draft revision of *Tax regulations* is to regulate the relations between treasury and tax payer (it envisages introduction of numerous privileges for companies) and tighten the tax system.

In the near future, the European Union funds, allocated to Poland within the *Financial Framework 2014-2020*, will be an important instrument of the state's economic policy, also having a significant bearing on the forestry-wood sector development. Financial programmes within the *Financial Framework 2014-2020* are essentially continuation of the programmes previously implemented from the EU budget for the period 2007-2013. The continuation of

the *Innovative Economy Operational Programme* is the *Intelligent Development Operational Programme*, with the new *Operational Programme – Digital Poland* set apart. And the *Human Capital Operational Programme* has been replaced by the *Knowledge, Education, and Development Operational Programme*. Whilst in the period 2007-2013 most of the finance was allocated to infrastructural development, within the current Financial Framework more finance will be allocated to entrepreneurship development, and science and research for the economy. This will be the result of a strong orientation towards the support for intelligent specialisation development (key thematic areas in terms of national or regional development) and integrated territorial investments (thematically different projects, but mutually complementary). Sometimes the rules of applying for financing has been changed, due to the change in the European Commission's approach to state's aid, and concern mainly private companies.

The works on the development strategy for Polish forestry and the wood market continue. They are conducted within the framework of preparation of the *National Forest Programme*, with the participation of representatives of Polish forestry-wood sector (the end of works is planned for 3Q 2015). A vision of Polish forestry development by 2030 and beyond, by 2080, has been prepared by cyclically meeting panels of experts, with the participation of representative of various social groups related to forest management and raw wood material processing (information and discussion forum – [www.ibles.pl](http://www.ibles.pl)).

### **3. MARKET DRIVERS**

Development strategies are an important aspect of economic activity, also in the forestry-wood sector. Such strategic significance is associated with a draft document *Priorities of Industrial Policy 2015-2020+* addressed to entrepreneurs and public administration (which will replace the previous document entitled *Concept of horizontal industrial policy in Poland*). This document defines the goal and priorities of the state's industrial policy, which require taking actions significantly improving the competitive position of Polish industry. The main priority is sustainable development of industry in Poland, whilst at the same time national resources are managed effectively. The development is to make use of comparative advantages as well as the advantages built based on the growth of human resources value and innovativeness of the economy. The key instruments for implementation of the national industrial policy are to be these resulting from the operational programmes within the framework of the EU *Financial Framework 2014-2020* and the document *National Intelligent Specialisation*, being an integral part of the *Company development programme 2020* (whose aim is the growth of innovativeness, productivity and competitiveness of companies, especially SMEs, through inter alia intensification of cooperation between business and science).

Next edition of the *Intelligent Development Operational Programme 2020* is of great importance for the growth of innovativeness of companies, including wood companies. Apart from innovativeness, the programme envisages the following support areas: building of new and strengthening of existing relations between science and companies, and improvement of the research quality and the position of national scientific institutions. One of the instruments addressed to small and medium-sized enterprises and connected with internationalisation of companies is support for product brand promotion within the programme *Go to Brand*. The programme also envisages support for the entrepreneurs planning investments in R&D centres (*Support for investments in R&D infrastructure of companies*), thanks to which they will have the possibility of conducting research and implementing its effects on the market.

Companies from the forestry-wood sector are also direct recipients of one of the

strategic R&D programmes entitled *Natural environment, agriculture and forestry* (with the acronym BIOSTRATEG). The companies participating in scientific consortia, carrying out scientific projects, are involved in the process of creation and implementation of new products, techniques and technologies, and also other solutions usable in the areas encompassed by the thematic scope of the programme. The sectoral programmes are also to stimulate the development of wood industries. These programmes finance R&D activities in companies from particular economy sectors. In 2015, two applications for sectoral programmes concerning the forestry-wood sector have been filled, i.e. a proposal concerning recycling of wood waste (addressed to the wood industry) and a proposal concerning innovativeness (addressed to the furniture industry and cooperating industries).

The actions within the framework of the information and promotion campaign *Made in Poland* still have a positive influence on activation of economic activity in the forestry-wood sector. This campaign is addressed mainly to countries such as Germany, China, United Arab Emirates, and Brazil, and its purpose is to encourage foreign investors to establish cooperation with Polish companies. The industry promotion programmes are also continued, whilst the programme *Activation of export on selected markets* ended in May 2015.

The programme *New Opportunity Policy*, executed until 2020, is especially important for small and medium-sized enterprises with unstable financial and economic situation. Actions taken within this programme are to avert crises in companies, limit the risk of their bankruptcy, and facilitate resumption of operation.

Polish wood companies may suffer from production issues (although of unknown scale) due to the serious barriers, which may occur in wood import from Eastern European markets (Ukraine and Belarus), which are traditional suppliers of Poland, for Ukraine adopted an amendment to the *Act on the principles of state regulation of the operation of business entities connected with distribution and export of wood*, which provides a 10-year moratorium on the exportation of raw wood material and sawnwood from its territory (as of the 1<sup>st</sup> November 2015, and in the case of pine wood as of the 1<sup>st</sup> January 2017). Belarus also moves towards a similar ban on unprocessed wood exportation, which is to be introduced on 1.1.2016.

## **4. DEVELOPMENTS IN FOREST PRODUCTS MARKETS SECTORS**

### **4.1. (A) Wood raw materials**

In 2014, removals of roundwood increased 5% in relation to the previous year, and amounted to 40.9 million m<sup>3</sup> (net, without bark). 1.1 million m<sup>3</sup> of this was roundwood from trees from outside the forest (productive and protective plantings of trees and shrubs in public and private areas outside forests and green areas in the cities). Similarly to previous years, the structure of removals was dominated by roundwood from public forests (94%, 38.5 million m<sup>3</sup>), most of which originated from forests stewarded by the State Forests National Forest Holding (93%, 37.8 million m<sup>3</sup>). Coniferous roundwood removals were the biggest (74%). Roundwood for industrial purposes accounted for 87% of total harvested roundwood (35.7 million m<sup>3</sup>; a 6% increase in relation to 2013). Pulpwood accounted for almost 51% of wood for industrial purposes (18.1 million m<sup>3</sup>; its removals increased 5% in relation to the previous year). The share of sawnlogs (including veneer logs and peeler logs) within the structure of harvested industrial wood amounted to almost 46% (16.4 million m<sup>3</sup>), and it was over 7% more compared to 2013.

In 2014, exports of roundwood were 5% less than in the previous year (2.9 million m<sup>3</sup> compared to 3.1 million m<sup>3</sup> in 2013). Exports accounted for more than 7% of domestic removals, and encompassed mainly wood for industrial purposes (92%, 2.7 million m<sup>3</sup>; a 5% decrease of exports in relation to the previous year). The structure of exported industrial wood

was dominated by coniferous roundwood (90%). The exports of pulpwood decreased 16% (from 1.4 million m<sup>3</sup> to 1.2 million m<sup>3</sup>), and of sawnlogs increased 5% (from 1.4 million m<sup>3</sup> to 1.5 million m<sup>3</sup>). 0.2 million m<sup>3</sup> of fuelwood was also exported (over a 3% decrease in relation to 2013).

In 2014, 2.7 million m<sup>3</sup> of roundwood was imported to Poland. It was 17% more than in the previous year. Imported roundwood accounted for almost 7% of domestic removals. Most of imported wood, i.e. 97%, was intended for industrial purposes (2.6 million m<sup>3</sup>). The share of coniferous roundwood within the structure of industrial wood imports increased to 50% (from 46% in 2013) and equalled 1.3 million m<sup>3</sup>. Pulpwood imports increased 22% and exceeded 1.8 million m<sup>3</sup> (compared to 1.5 million m<sup>3</sup> in 2013). Poland also imported 85% more sawnlogs (242 thou. m<sup>3</sup>, including veneer logs and peeler logs) and 57% more fuelwood (90 thou. m<sup>3</sup>).

It is assumed that in the period 2015-2016 wood removals will increase more than 4% annually, i.e. to a level of 42.6 million m<sup>3</sup> and 44.5 million m<sup>3</sup>, respectively. The structure of removals will still be dominated by industrial wood (37.3 million m<sup>3</sup> in 2015 and 39 million m<sup>3</sup> in 2016), and fuelwood harvesting may increase to 5.3 million m<sup>3</sup> and 5.4 million m<sup>3</sup>, respectively. It is also anticipated that in this period wood exports will increase (to 3.1 million m<sup>3</sup> in 2015 and 3.3 million m<sup>3</sup> in 2016), and so will wood imports (to 3.2 million m<sup>3</sup> and 3.6 million m<sup>3</sup>, respectively). Both exports and imports will still be dominated by wood intended for industrial purposes. Exports of fuelwood may increase to 250 thou. m<sup>3</sup> in 2015 and 280 thou. in 2016, and its imports to 100 thou. m<sup>3</sup> and 130 thou. m<sup>3</sup>, respectively.

In the near future, domestic importers of wood may be significantly affected by the emergence of barriers in access to relatively cheaper roundwood originating from Eastern European markets. The ten-year moratorium on export of unprocessed wood from Ukraine is to come into force as of the 1<sup>st</sup> November 2015 (and in the case of pine wood it will be effective as of the 1<sup>st</sup> January 2017). Belarus is also planning to introduce similar restrictions on roundwood exports starting from the 1<sup>st</sup> January 2016. Belarus and Ukraine are traditionally the biggest wood suppliers of Poland (in 2014 their share within wood imports to Poland equalled 68% and more than 8%, respectively).

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

In the period 2010-2013 production of renewable energy in Poland increased almost 25% (from 6.9 million toe to 8.6 million toe). In this period the share of renewable energy production within total energy production increased from 10.2% to 11.93%, and within total energy consumption from 6.76% to 8.65%. Amongst renewable energy carriers, solid biomass is the most important, and wood biomass accounts for approximately 85% of it. The establishment of many new so-called micro-installations producing energy from renewable sources in backyard house power plants, often using solar energy, contributes to the increased share of renewable energy production within gross final energy consumption. This facilitates diversification of energy sources and decreases the pressure to use wood biomass as an energy carrier (also popular in households). The energy policy of Poland assumes gradual resignation from the technology of co-burning of biomass and coal, until its complete elimination in 2020. The *Act of 2015 on Renewable Energy Sources* introduced the following classification: installations dedicated to biomass combustion, installations dedicated to multi-fuel co-burning, hybrid installations, and other (i.e. simple co-burning). Producers using the simplest technology of co-burning (cogeneration) will retain the right to obtain half of the certificate of origin, if they produce 1 MWh of energy over 15 years. Starting from 2016 the certificates of origin from co-burning will gradually lose their significance, and beyond 2019 they will be eliminated.

The state's strategy concerning the power industry is also presented in a draft project of *Energy policy of Poland until 2050*, drawn up in 2015. This document also relates to energy from renewable sources and the prosumer power industry, indicating instruments supporting its development, which are mainly loans with low rate of interest covering up to 100% of qualified costs connected with the purchase and fitting of micro-installations using renewable sources for energy and heat generation. Various initiatives are also taken, e.g. the Group for RES and energy efficiency established within the framework of the project *Vision of sustainable development for Polish business 2050* (Vision 2050), promoting creation of the *Sustainable Energy Platform*, which is to be conducive to cooperation between business and public administration in order to implement a systemic approach to the issue of effective use of energy on the Polish market. The goal of this platform is to encourage various entities to invest in RES and energy efficiency, disseminate knowledge of finances allocated to the actions for effective use of energy (including energy from renewable sources), and establish cooperation with institutions and non-governmental organisations financing or promoting actions in this field. Creation of such a platform was taken into consideration in the project of the *National Programme of Reforms for the implementation of "Europe 2020" strategy. Revision 2015/2016*.

Moreover, in view of the growing demand for energy and the necessity of implementing climate policy, including rationalisation of energy consumption, improvement of the efficiency of industrial processes, low carbon technologies, and dissemination of cleaner production practices, companies from energy-intensive industries have been forced to prepare proper adaptation plans. In Polish wood sector (i.e. the entire wood-based sector) the most energy-intensive are the wood-based panel industry and the pulp and paper industry. In Poland fuels and electric energy account for 12%-18% of total costs of the production of chemical paper-pulp and paper. In 2014, in the structure of costs by type, energy accounted for 3.5% for the pulp and paper industry, and 4.9% for the wood-based panel industry (whilst for the entire wood industry it accounted for 3.2%). The lowest level of this index was recorded for the furniture industry – approximately 1.6%.

#### **4.3. (C) Certified forest products**

Presently in Poland operate two systems of certification of forest management and forest industry, which are recognised on the market, i.e. FSC (*Forest Stewardship Council*) since 1996 and PEFC (*Programme for the Endorsement of Forest Certification Scheme*) since 2010.

In mid 2015, 16 out of 17 State Forests Regional Directorates and 2 Forest Experimental Stations (in Rogów and Siemianowice) held FSC certificates. This means, that in Poland FSC certification covers 6.9 million ha of forests, i.e. 75% of their total area. In mid 2015, also 2679 FSC-CoC certificates were registered in Poland. 1885 of them were active (approximately 30% of the certificates were inactive, i.e. they were temporarily suspended or had expired). Approximately 17% of certified companies (313) also possessed FSC-CW (*FSC Controlled Wood*) certificates. Additionally, 136 companies, i.e. 7%, held FSC-RA (*FSC Controlled Wood Risk Assessment*) certificates, confirming implementation of a risk assessment system for wood supplies. Approximately 70% of 1885 active certificates was issued for production companies. These were mainly certificates for the producers of sawnwood, wooden garden products, builder's carpentry and joinery, furniture and its elements, wooden accessories, wood-based panels, wood pulp, and paper and secondary paper products.

On the other hand, in mid 2015 in Poland all State Forests Regional Directorates held PEFC certificates (16 certificates were group certificates, and 1 was individual). The area of forests covered by the certification within PEFC system was 7.3 million ha, which was more



than 79% of the country's forest area. At the same time, 194 certificates of supply chain control, i.e. PEFC-CoC, were registered in Poland, of which 163, i.e. 84%, were active certificates. Approximately 64% of them (i.e. 105 active certificates) was held by production companies, which manufacture wood products at various processing stages, including mainly the producers of sawnwood, pallets, flooring materials, furniture and its elements, wood-based panels, wood pulp, and paper and paperboard.

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

Furniture, i.e. high value added products, is of special importance in the broad range of wood products manufactured in Poland. In 2014, value of furniture production (including furniture elements) amounted to PLN 32.3 bn (€ 7.7 bn, \$ 10.2 bn) and was over 14% higher than in the previous year (in fixed prices). Furniture has also a significant position in Polish export, with the share of 4.7% in its total value. Almost 70% of produced furniture (PLN 22.3 m, € 5.3 bn, \$ 7.1 bn) was wooden furniture. Its production increased 14% in relation to 2013, in real terms. This furniture was mainly upholstered and non-upholstered furniture for sitting and bedroom, living room and dining room furniture. In 2014, almost 77% of domestic production of wooden furniture was exported (PLN 17.1 bn, € 4.1 bn, \$ 5.5 bn). It was 13% more than in 2013 (in current prices). The exports of wooden furniture were also dominated by furniture for sitting, and room and living room furniture. On the other hand, in 2014 Poland imported wooden furniture of the value of PLN 1.3 bn (€ 0.3 bn, \$ 0.4 bn), which amounted to almost 6% of its domestic production volume. In 2014, imports of wooden furniture increased 20% in relation to the previous year. The structure of imported furniture was dominated by furniture for sitting, and room and living room furniture.

In 2014, the production of builder's carpentry and joinery (including wooden houses) increased to PLN 6.5 bn (€ 1.6 bn, \$ 2.1 bn), i.e. more than 8% in relation to the previous year (in fixed prices). Amongst other things, 15.1 million m<sup>2</sup> of windows and doors were produced (14% more than in 2013), as well as 2.1 million m<sup>2</sup> of mosaic (a 8% increase in relation to the previous year), and almost 59 million m<sup>2</sup> of laminated floor panels (a 11% increase). Approximately 60% of the production of builder's carpentry and joinery products was exported (PLN 3.9 bn, € 0.9 bn, \$ 1.2 bn). In relation to 2013, exports of these products increased 8% (in current prices) and encompassed mainly wooden windows and doors (58%). On the other hand, in 2014 imports of this group of products increased to PLN 0.3 bn (€ 0.08 bn, \$ 0.1 bn), i.e. almost 14% (in current prices), in relation to the previous year. Poland's imports accounted for more than 5% of domestic production of builder's carpentry and joinery products. The structure of imports was dominated by flooring materials (25%) and windows and doors (21%).

In 2014 in Poland, value of wooden packaging production equalled PLN 1.9 bn (€ 0.5 bn, \$ 0.6 bn). Its production increased 17% in relation to 2013, in real terms. Pallets were the majority in this group of wooden products – their production exceeded 90 million pieces and was 7% higher than in the previous year. Almost 79% of domestic production of wooden packaging was exported (PLN 1.5 bn, € 0.4 bn, \$ 0.5 bn), and it was 19% more than the year before (in current prices). Pallets dominated the structure of exports with the share exceeding 90% of the exports' value. On the other hand, Poland imported wooden packaging of the value of PLN 206.4 m (€ 49.3 m, \$ 65.4 m), i.e. 5% more than in 2013 (in current prices). In 2014, imports of wooden packaging amounted to approximately 11% of domestic production. Pallets had a 74% share within the imports' structure.

Paper products are of great importance in the group of value-added wood products in Poland. In 2014, their production value equalled PLN 20 bn (€ 4.8 bn, \$ 6.4 bn) and was 8% higher than in 2013, in real terms. The structure of production of paper and paperboard products was dominated by paper and corrugated paperboard and packaging made of it (its share was 59%), and products for households and toilet and sanitary products (27%). In 2014, approximately 34% of manufactured paper and paperboard products was exported, i.e. 8% more than in the previous year (in current prices). The exports encompassed mainly packaging made of paper and paperboard (its share within the structure of paper product exports was 36%), special coated papers (24%), as well as paper products for households and sanitary products (22%). On the other hand, in 2014 value of Poland's imports of paper and

paperboard products equalled PLN 4.5 bn (€ 1.1 bn, \$ 1.4 bn), and increased 3% in relation to 2013 (in current prices). In relation to production, the imports amounted to 22%. Poland's imports were dominated by packaging made of paper and paperboard (36%). The import of special coated papers (approximately 20%) and articles for households and sanitary products (19%) was also of great importance for Polish market in paper products.

#### **4.5. (E) Sawn softwood**

In Poland, the structure of sawnwood material production is dominated by sawn softwood. In 2014, as in previous years, sawn softwood accounted for approximately 90% of total sawnwood production. In 2014, sawn softwood production amounted to 4.2 million m<sup>3</sup>, meaning that it was 9% higher than in 2013. Foreign trade in sawn softwood also increased in 2014 (compared to the previous year), i.e. its exports increased 27% and amounted to 637 thou. m<sup>3</sup>, and imports increased 29%, i.e. to 573 thou. m<sup>3</sup>. Sawn softwood exports accounted for 15% of production, and imports for 14%. On the other hand, sawn softwood accounted for 88% of total sawnwood exports, and 70% of imports.

In the near future, it may be expected that sawn softwood production will increase to 4.6 million m<sup>3</sup> in 2015 and 4.9 million m<sup>3</sup> in 2016. It is also assumed, that sawn softwood exports will increase 13% in 2015 (to 0.7 million m<sup>3</sup>), and 30% in 2016 (to 0.8 million m<sup>3</sup>), in relation to 2014.

#### **4.6. (F) Sawn hardwood**

In 2014, sawn hardwood production amounted to 491 thou. m<sup>3</sup> and was 10% higher than the year before. At the same time, it accounted for 10% of total sawnwood production in Poland. Most of sawn hardwood came to domestic market, only 18% of its production was exported (89 thou. m<sup>3</sup>), i.e. 2% more than in 2013. On the other hand, imports of sawn hardwood accounted for 50% of its domestic production and amounted to 245 thou. m<sup>3</sup> (compared to 224 thou. m<sup>3</sup> in 2013). Tropical species accounted for 8% of imported sawn hardwood (19 thou. m<sup>3</sup>).

It is assumed, that in 2015 the production of sawn hardwood will increase 5% in relation to 2014 (to 515 thou. m<sup>3</sup>) and 12% in 2016 (to 550 thou. m<sup>3</sup>). At the same time, it is forecasted that by 2016 exports of these products will increase to 100 thou. m<sup>3</sup>, and imports to 270 thou. m<sup>3</sup>.

#### **4.7. (G) Wood-based panels**

In 2014, 9.2 million m<sup>3</sup> of wood-based panels was produced in Poland, i.e. over 2% more than in 2013. The production volumes were as follows: 4.8 million m<sup>3</sup> of particleboards (this was a level similar to the previous year's; OSBs accounted for 0.4 million m<sup>3</sup> of this amount), 3.9 million m<sup>3</sup> of fibreboards (5% more than the year before; dry-process fibreboards accounted for 78% of this amount), 0.4 million m<sup>3</sup> of plywood (5% less than in 2013), and 55 thou. m<sup>3</sup> of veneers (7% more than in the previous year). Almost 27% of domestic production of wood-based panels was exported (2.5 million m<sup>3</sup>; 4% more than in 2013). The structure of exported panels was dominated by fibreboards (1.6 million m<sup>3</sup>), including dry-process boards (0.7 million m<sup>3</sup>), and particleboards (0.7 million m<sup>3</sup>). The exports encompassed also 0.2 million m<sup>3</sup> of plywood and 18 thou. m<sup>3</sup> of veneers. On the other hand, in 2014 Poland imported 2.2 million m<sup>3</sup> of particleboards, which meant an increase in imports exceeding 35%. At the same time, imports of wood-based panels accounted for 24% of domestic production. These panels were mainly particleboards (1.5 million m<sup>3</sup>) and fibreboards (0.4 million m<sup>3</sup>). The imports of plywood amounted to 0.3 million m<sup>3</sup>, and veneers to 48 thou. m<sup>3</sup>.

It is forecasted, that by 2016 the production of wood-based panels in Poland may increase to 9.8 million m<sup>3</sup>, i.e. 6% in relation to 2014, and its structure will still be dominated by fibreboards and particleboards. It is anticipated that new OSB production line will be launched and a further growth of dry-process panel production will be observed. In 2016, exports of wood-based panels probably will increase to 2.7 million m<sup>3</sup>, i.e. 10% in relation to 2014, and imports to 2.3 million m<sup>3</sup>, i.e. 5% in relation to the base year of the forecast. Both exports and imports will still be dominated by fibreboards and particleboards.

#### **4.8. (H) Pulp and paper**

In recent years in Poland, the production of wood pulp has remained at a similar level. In 2014, it amounted to 1.1 million tonnes and was 1% higher than in 2013 (apart from this, 0.1 million tonnes of pulp from fibres other than wood fibres and from recycled fibres was also produced). Similarly to previous years, the structure of wood pulp production, was dominated by cellulose, whose share was approximately 79% (881 thou. tonnes), followed by semi-chemical wood pulp with the share exceeding 10% (117 thou. tonnes), mechanical wood pulp with the share of almost 7% (76 thou. tonnes), and wood pulp other than that for chemical processing with the share of 4% (46 thou. tonnes). 15% of domestic production of wood pulp was exported (171 thou. tonnes; almost twice as much as the year before). Cellulose accounted for approximately 94% of exports. On the other hand, in 2014 Poland imported 926 thou. tonnes of wood pulp, which was 9% more than in 2013 and almost 83% of its domestic production. Similarly as in the case of exports, imports were also dominated by cellulose (94%).

In the period 2015-2016 no rapid increase in wood pulp production is expected. It should remain at the level of 1.1 million tonnes. Previous trends in foreign trade should also continue. It is anticipated that in 2016 wood pulp exports may increase to 220 thou. tonnes (28% increase in relation to 2014), and imports to 990 thou. tonnes (7%). This means, that in 2016 imports may account for almost 88% of domestic production.

In 2014, also 4.3 million tonnes of paper and paperboard was produced, i.e. 4% more than in 2013. The structure of manufactured papers was dominated by packaging papers (with the share of 66%) and graphic papers (21%). Almost 52% of production (2.2 million tonnes) was exported (2% more than in the previous year). The exports were mainly packaging papers (which accounted for 69% of total exports of paper and paperboard) and graphic papers (28%). Domestic production of paper and paperboard was considerably supplemented by its imports in the amount of 3.6 million tonnes (in 2014 the relation of imports to production was approximately 84%). In relation to the previous year, imports increased more than 6%, and, similarly to exports, were dominated by packaging papers (whose share equalled 60%) and graphic papers (36%).

In coming years, the production of paper and paperboard may increase to 4.6 million tonnes (in 2016 it will be almost 8% more than in 2014). As regards foreign trade, it is anticipated, that until 2016 exports will grow faster (to 2.4 million tonnes; 9% increase in relation to 2014) than imports (to 3.9 million tonnes; more than 7% more than in 2014).

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

Innovations through increasing the efficiency of production or distribution, or through the introduction of new products, are the basis for sustainable development of the economy and industries. In Polish wood sector (i.e. the entire wood-based sector), as in the entire economy, the percentage of companies with expenditure on innovative activity is not high. Only in the pulp and paper industry and paper processing industry the percentage was higher than an average in manufacturing and amounted to 16.1% in 2013 (in manufacturing it was

13.1%, and in industry in general 13.3%). In the case of traditionally understood wood industry, this percentage was 6.9%, and in the furniture industry 8.9%. Also the scale of expenditure on innovative activity is not high, compared to other industries. In 2013, in the wood-based sector this expenditure was at the previous year's level and amounted to PLN 1.1 bn (current prices), which was 7% of total expenditure in manufacturing and approximately 5% in the case of industry in general. In 2013, the highest expenditure on innovation was recorded in the pulp and paper industry and the paper processing industry (PLN 0.6 bn, almost 57% of the expenditure of the entire wood-based sector). This expenditure amounted to PLN 0.3 bn in the furniture industry (27% of the expenditure on innovations of the entire wood-based sector) and PLN 0.2 bn in the wood industry (16%). Similarly to previous years, the greatest percentage of investment in innovations were machines and equipment: 62% in the wood industry, 79% in the pulp and paper industry and paper processing industry, and 48% in the furniture industry. A relatively insignificant part of expenditure on innovation activity, i.e. less than 7%, was allocated to R&D in the wood-based sector (whilst in manufacturing it was more than 22%, and in industry in general 19%). The value of this index was mainly affected by the expenditure on R&D in the furniture industry, where it amounted to approximately 17% of total expenditure of this industry on innovative activity.

In Polish wood sector innovations are basically of technical and technological nature and concern mainly changes in the material structure of the products. The percentage of innovative companies, which in the period 2011-2013 introduced new or significantly improved products, was less than 6% in the wood industry, and approximately 12% in the pulp and paper industry and paper processing industry, and the furniture industry (it was also 12% on average in manufacturing). On the other hand, in the case of process innovations, the percentage of innovative companies, which introduced new or significantly improved processes in said period, was approximately 8%, 17%, and 10%, respectively (for comparison, this percentage in manufacturing exceeded 12%). In the wood sector (i.e. the entire wood-based sector) such innovations mainly concerned introduction of new production methods, and more seldom introduction of new methods in the field of logistics and distribution, and supporting methods (connected with maintenance, purchases, accountancy etc.).

Presently, innovative products in Polish wood sector are mainly improved wood composites, including these based on alternative raw lignocellulosic materials, panels and structural building elements, inter alia, these made of LVL (*Laminated Veneer Lumber*). More and more often, the innovativeness of wood companies is evidenced by their level of computerisation, as well as solutions in the field of automatics and robotics applied by them. These solutions support monitoring of the production management system, including the management of material flow. Systems such as ERP (management of business processes), CRM (sale support) or BI (business analytics) become more and more popular, even amongst small and medium-sized wood companies (still, they are not popular enough yet). At the time of globalisation and higher and higher standards concerning products, good design is also of special importance. Hence the academia, designers and entrepreneurs establish cooperation more and more often. This is important, especially in the furniture industry, where innovative furniture design plays an important role. Solutions, which are in line with global and European trends in furniture design, are launched (an example are intelligent furniture fittings, combining functionality and aesthetics).

## **5.0. (J) Housing and construction**

In 2014 in Poland the increase in construction and assembly production was 2.6% in relation to 2013, in real terms. High dynamics of growth was especially characteristic of construction of civil engineering facilities (7.3% increase), and to a lesser extent of specialist

construction works (3.2% increase). On the other hand, the value of construction works related to erection of buildings decreased more than 1% in relation to the previous year. The current results for 2015 suggest, that in this year an approximately 4% increase in sales of construction and assembly production may be expected, compared to the previous year. The anticipated growth of production (3-4%) will concern all categories, i.e. erection of buildings, construction of civil engineering facilities, and specialist works. In the opinion of entrepreneurs, the main barriers to construction activity in Poland are high labour costs and strong competition on the market. In the last year, however, the costs of building materials stabilised, which reduced their negative influence on the growth of construction and assembly production (in the view of entrepreneurs, currently their production capacity is used in 79%). In coming years, the possibility of using EU funds, within the *Financial Framework 2014-2020*, to finance infrastructural investments should stimulate the construction industry development.

In 2014, decrease in the number of dwellings completed exceeded 1% in relation to the previous year (from 145.1 thou. in 2013 to 143.2 thou. in 2014). This decrease concerned mainly individual construction (more than a 6% decrease) and housing association apartments (a 0.1% decrease). On the other hand, the number of dwellings for sale or rental increased 4.6%. A positive phenomenon (confirmed also by the current results for 2015) was an increase in the number of construction permits concerning new dwellings (a 13% increase in relation to 2013) and the number of dwellings, whose construction was commenced (an increase exceeding 16%). It is anticipated, that after a period of stagnation, the number of new dwellings will systematically increase (profitability of construction companies has improved, and there is demand for new dwellings).

Table 1

## Economic indicators

Indicator	2010	2011	2012	2013	2014
	% change on previous year				
Gross Domestic Product	103.7	104.8	101.8	101.7	103.4
Sold production of industry	109.0	107.5	100.5	101.8	103.1
Construction and assembly production	104.6	111.8	93.7	94.1	102.6
Dwellings completed	84.9	96.4	116.8	94.9	98.6
Dwellings under construction	103.3	104.5	98.5	97.5	100.7
Average paid employment					
- total	99.8	100.6	99.2	98.4	101.0
- in the enterprises sector	100.8	103.2	100.1	99.0	100.6
Registered unemployment rate (at the end of the year) <sup>1</sup>	12.4	12.5	13,4	13.4	11.5
Average monthly gross real wages and salaries					
- total	101.4	101.4	100.1	102.8	103.4
- in the enterprises sector	100.8	100.9	99.8	102.0	103.7
Price indices of consumer goods and services (inflation)	102.6	104.3	103.7	100.9	100.0
Investment outlays	100.2	110.6	97.2	98.8	108.7
<b>Trade</b>					
<b>millions of PLN, current prices</b>					
Exports	481058.2	558739.0	603418.6	647878.8	693471.6
Imports	436220.6	623372.7	648127.6	656098.2	704567.5
Balance of trade	-55162.4	-64633.7	-44709.0	-8219.4	-11095.9
<b>millions of USD, current prices</b>					
Exports	159757.6	190247.5	184660.6	206138.0	222339.4
Imports	178062.9	212330.9	198463.4	208780.4	225898.5
Balance of trade	-18305.3	-22083.4	-13802.8	-2642.4	-3559.1
<b>millions of EUR, current prices</b>					
Exports	120373.1	136693.9	143456.1	154994.0	165773.6
Imports	134188.4	152568.4	154040.2	156978.0	168432.3
Balance of trade	-13815.3	-15874.5	-10584.1	-1984.0	-2658.7

<sup>1</sup> as a ratio of registered unemployed persons to the economically active civil population



**TF1**  
**UNECE TIMBER FORECAST QUESTIONNAIRE**  
**Roundwood**

<b>Country:</b> Poland	<b>Date:</b> 15.09.2015
<b>Name of Official responsible for reply:</b> Władysław Strykowski	
<b>Official Address (in full):</b> Wood Technology Institute 60-654 Poznań, Winiarska 1, Poland	
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Product Code	Product	Unit	Historical data		Revised	Estimate	Forecast
			2013	2014	2014	2015	2016
1.2.1.C	<b>SAWLOGS AND VENEER LOGS, CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	12 214,66	13 054	13 235,063	13 900	14 600
	Imports	1000 m <sup>3</sup>	75,94	80 #	142,748	180	200
	Exports	1000 m <sup>3</sup>	1 267,09	1 350 #	1 339,985	1 420	1 500
	Apparent consumption	1000 m <sup>3</sup>	11 023,51	11 784	12 037,826	12 660	13 300
1.2.1.NC	<b>SAWLOGS AND VENEER LOGS, NON-CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	3 053,91	3 125	3 128,004	3 220	3 350
	Imports	1000 m <sup>3</sup>	55,00	60 #	99,056	120	150
	Exports	1000 m <sup>3</sup>	138,65	140 #	133,466	140	150
	Apparent consumption	1000 m <sup>3</sup>	2 970,26	3 045	3 093,594	3 200	3 350
1.2.1.NC.T	<b>of which, tropical logs</b>						
	Imports	1000 m <sup>3</sup>	1,90	2 #	1,549	2	2
	Exports	1000 m <sup>3</sup>	4,54	4 #	0,073	0	0
	Net Trade	1000 m <sup>3</sup>	-2,64	-2	1,476	2	2
1.2.2.C	<b>PULPWOOD (ROUND AND SPLIT), CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	12 393,34	13 090	13 115,216	13 850	14 500
	Imports	1000 m <sup>3</sup>	976,20	980 #	1 175,205	1 350	1 500
	Exports	1000 m <sup>3</sup>	1 325,80	1 350 #	1 081,681	1 100	1 200
	Apparent consumption	1000 m <sup>3</sup>	12 043,74	12 720	13 208,740	14 100	14 800
1.2.2.NC	<b>PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	4 841,31	4 955	4 935,892	5 030	5 150
	Imports	1000 m <sup>3</sup>	515,63	520 #	644,302	700	800
	Exports	1000 m <sup>3</sup>	70,82	80 #	86,453	100	120
	Apparent consumption	1000 m <sup>3</sup>	5 286,12	5 395	5 493,741	5 630	5 830
3	<b>WOOD CHIPS, PARTICLES AND RESIDUES</b>						
	Domestic supply <sup>1</sup>	1000 m <sup>3</sup>	8 114,00 N	8 300 C	9 320,538	9 500	9 650
	Imports	1000 m <sup>3</sup>	1 346,04	1 675 C	1 800,298	1 900	2 000
	Exports	1000 m <sup>3</sup>	594,64	679 C	910,712	1 050	1 200
	Apparent consumption	1000 m <sup>3</sup>	8 865,40	9 296	10 210,124	10 350	10 450
1.2.3.C	<b>OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	1 158,65	1 073	1 131,549	1 120	1 110
1.2.3.NC	<b>OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	133,19	128	131,446	130	120
1.1.C	<b>WOOD FUEL, CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	2 651,51	2 632	2 674,216	2 750	2 830
1.1.NC	<b>WOOD FUEL, NON-CONIFEROUS</b>						
	Removals	1000 m <sup>3</sup>	2 492,29	2 508	2 510,652	2 550	2 600

Please return (preferably by e-mail) to Timber Section no later than 2 October 2015.

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.

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<sup>1</sup> Wood chips, particles and 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





**TF2**

**UNECE TIMBER FORECAST QUESTIONNAIRE**  
Forest products

Country: Poland	Date: 15.09.2015
Name of Official responsible for reply: Władysław Strykowski	
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Product Code	Product	Unit	Historical data		Revised	Estimate	Forecast
			2013	2014	2014	2015	2016
5.C	<b>SAWNWOOD, CONIFEROUS</b>						
	Production <sup>1</sup>	1000 m <sup>3</sup>	3 873,55	4 150	4 228,533	4 550	4 900
	Imports	1000 m <sup>3</sup>	444,90	477	573,186	590	650
	Exports	1000 m <sup>3</sup>	502,72	646	637,221	720	830
	Apparent consumption	1000 m <sup>3</sup>	3 815,73	3 981	4 164,498	4 420	4 720
5.NC	<b>SAWNWOOD, NON-CONIFEROUS</b>						
	Production <sup>1</sup>	1000 m <sup>3</sup>	447,06	465	490,896	515	550
	Imports	1000 m <sup>3</sup>	223,82	237	244,868	250	270
	Exports	1000 m <sup>3</sup>	86,77	91	88,537	90	100
	Apparent consumption	1000 m <sup>3</sup>	584,11	611	647,227	675	720
5.NC.T	<b>of which, tropical sawnwood</b>						
	Production	1000 m <sup>3</sup>	0,08	1	0,021	1	1
	Imports	1000 m <sup>3</sup>	19,95	17	18,820	18	19
	Exports	1000 m <sup>3</sup>	5,07	3	2,401	2	2
	Apparent consumption	1000 m <sup>3</sup>	14,96	14	16,440	17	18
6.1	<b>VENEER SHEETS</b>						
	Production	1000 m <sup>3</sup>	49,81	55 C	53,502	56	59
	Imports	1000 m <sup>3</sup>	50,26	40 C	47,951	48	49
	Exports	1000 m <sup>3</sup>	16,95	16 C	18,269	19	21
	Apparent consumption	1000 m <sup>3</sup>	83,12	79	83,184	85	87
6.1.NC.T	<b>of which, tropical veneer sheets</b>						
	Production	1000 m <sup>3</sup>	5,00 N	5	5,000	5	5
	Imports	1000 m <sup>3</sup>	0,52	0 E	0,399	1	1
	Exports	1000 m <sup>3</sup>	0,14	0	0,079	0	0
	Apparent consumption	1000 m <sup>3</sup>	5,38	5	5,320	6	6
6.2	<b>PLYWOOD<sup>2</sup></b>						
	Production	1000 m <sup>3</sup>	429,74	485 C	406,218	420	450
	Imports	1000 m <sup>3</sup>	215,00	269 C	299,034	310	330
	Exports	1000 m <sup>3</sup>	181,19	198 C	202,734	210	250
	Apparent consumption	1000 m <sup>3</sup>	463,55	556	502,518	520	530
6.2.NC.T	<b>of which, tropical plywood</b>						
	Production	1000 m <sup>3</sup>	1,82	2	0,932	3	3
	Imports	1000 m <sup>3</sup>	9,19	12	12,076	12	13
	Exports	1000 m <sup>3</sup>	1,63	2	2,984	3	3
	Apparent consumption	1000 m <sup>3</sup>	9,38	12	10,024	12	13
6.3	<b>PARTICLE BOARD (including OSB)</b>						
	Production	1000 m <sup>3</sup>	4 785,77	4 790	4 809,477	4 830	5 000
	Imports	1000 m <sup>3</sup>	1 087,24	1 285	1 475,355	1 500	1 530
	Exports	1000 m <sup>3</sup>	677,88	667	666,666	680	730
	Apparent consumption	1000 m <sup>3</sup>	5 195,13	5 407	5 618,166	5 650	5 800
6.3.1	<b>of which, OSB</b>						
	Production	1000 m <sup>3</sup>	495,65	500	434,555	450	600
	Imports	1000 m <sup>3</sup>	215,70	223	247,172	250	250
	Exports	1000 m <sup>3</sup>	240,61	238	224,472	230	260
	Apparent consumption	1000 m <sup>3</sup>	470,74	485	457,255	470	590
6.4	<b>FIBREBOARD</b>						
	Production	1000 m <sup>3</sup>	3 738,46	4 075 C	3 931,464	4 120	4 275
	Imports	1000 m <sup>3</sup>	287,03	392 C	394,645	410	415
	Exports	1000 m <sup>3</sup>	1 492,33	1 143 C	1 570,115	1 630	1 700
	Apparent consumption	1000 m <sup>3</sup>	2 533,16	3 324	2 755,994	2 900	2 990
6.4.1	<b>Hardboard</b>						
	Production	1000 m <sup>3</sup>	199,57	200	218,349	220	225
	Imports	1000 m <sup>3</sup>	129,15	180	187,079	190	195
	Exports	1000 m <sup>3</sup>	330,37	290	300,937	300	300
	Apparent consumption	1000 m <sup>3</sup>	-1,65	91	104,491	110	120
6.4.2	<b>MDF (Medium density)</b>						
	Production	1000 m <sup>3</sup>	2 844,57	3 100	3 068,087	3 200	3 300
	Imports	1000 m <sup>3</sup>	145,55	202	198,468	210	210
	Exports	1000 m <sup>3</sup>	637,61	287	710,536	750	800
	Apparent consumption	1000 m <sup>3</sup>	2 352,51	3 015	2 556,019	2 660	2 710
6.4.3	<b>Other fibreboard</b>						
	Production	1000 m <sup>3</sup>	694,31	775	645,028	700	750
	Imports	1000 m <sup>3</sup>	12,33	10	9,098	10	10
	Exports	1000 m <sup>3</sup>	524,35	566	558,642	580	600
	Apparent consumption	1000 m <sup>3</sup>	182,29	219	95,484	130	160
7	<b>WOOD PULP<sup>3</sup></b>						
	Production	1000 m.t.	1 107,51	1 075 C	1 119,659	1 125	1 130
	Imports	1000 m.t.	850,58	810 C	925,737	950	990
	Exports	1000 m.t.	87,47	82 C	171,310	190	220
	Apparent consumption	1000 m.t.	1 870,62	1 804	1 874,086	1 885	1 900

<b>10</b>	<b>PAPER &amp; PAPERBOARD</b>						
	Production	1000 m.t.	4 105,51	4 200 C	4 278,384	4 450	4 600
	Imports	1000 m.t.	3 372,84	3 554 C	3 584,960	3 700	3 850
	Exports	1000 m.t.	2 170,00	2 213 C	2 206,444	2 300	2 400
	Apparent consumption	1000 m.t.	5 308,35	5 540	5 656,900	5 850	6 050
<b>4.1</b>	<b>WOOD PELLETS</b>						
	Production	1000 m.t.	600,00 N	620	620,000	630	640
	Imports	1000 m.t.	87,06	52	52,204	55	60
	Exports	1000 m.t.	183,94	274	182,545	185	190
	Apparent consumption	1000 m.t.	503,11	398	489,659	500	510

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<sup>1</sup> Sawnwood - production excluding shop lumber

<sup>2</sup> Plywood - no bamboo plywood

<sup>3</sup> Quantity of wood pulp is reported in metric tonnes (no air-dry weight), excluding pulp from fibres other than wood and excluding pulp from recovered fibre pulp

red colour - corrected data