UNECE Timber Committee
Market Report for Ireland 2008

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1.0 Irish Economy – An Overview[1]

2007

- The Irish economy grew by 5.3% in 2007 when measured in real GDP terms.
- Real GNP grew by 4.5%.
- In 2007, it is estimated that the forestry sector accounted for 0.3% of GDP.
- An Exchequer deficit of €1,619 million was recorded in 2007. This compares to a budgeted deficit of €546 million for 2007 as a whole. In 2006 the Exchequer recorded a surplus of €2,265 million[2]
- Consumer price inflation (CPI) for 2007 was 4.9% compared to 4.0% for 2006.
- Employment remained strong in 2007 with a growth rate of 3.6%.
    - 73,300 extra jobs were created in Ireland in 2007.
- The Irish rate of unemployment stood at 4.5% [3].
- Net immigration for 2007 was 67,300. This was a 6% reduction on immigration figures for 2006.
- In 2007, Irish exports grew by 8.2% in volume terms and by 7.7% in value terms.
- Services accounted for approximately 91% of the total value growth in exports for 2007
    - Overall export performance was driven by strong growth in non-tourism services exports, which are estimated to have increased by 15.7%.
    - Growth in the volume of merchandise exports is estimated at 4% in 2007, a significant improvement on that experienced in 2006 (0.8%).
- Personal consumption grew by 9.2% in value terms and 5.4 % in volume terms.
- In 2007, the Irish housing market was responsible for 13.98% of GNP. However this sector slowed considerably in 2007, a slowdown which has continued into 2008

2008 – 2009

The Economic & Social Research Institute (ESRI)[4] forecasts that Ireland will experience a recession in 2008[5].

- Irish GDP is expected to decline by 0.4% in 2008 and to grow by 2.0 % in 2009.
- GNP is expected to decline by 0.4% in 2008 and to grow by 1.9 % in 2009.
- In the absence of budgetary intervention, it is forecast that the Irish government's budget deficit will reach 2.8 % of GDP in 2008 and 3.9 % in 2009.

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[1] Quarterly Economic Commentary – Summer 2008; Alan Barrett, Íde Kearney & Martin O'Brien, The Economic & Social Research Institute www.esri.ie
http://www.esri.ie/UserFiles/publications/20080623114553/QEC2008Sum.pdf

[2] http://www.finance.gov.ie/viewdoc.asp?DocID=5129

[3] As a percentage of the labour force

[4] www.esri.ie

[5] The Central Statistics Office has announced that "in the second quarter of 2008 GDP decreased by 0.8 per cent at constant prices compared with the same period in 2007, while GNP decreased by 2.1 per cent in volume over the same period. This is the second successive quarter in which GDP showed a decrease compared with the same quarter of the previous year". Technically this is the accepted definition of recession.

- This is forecast to be -€8,208 million in 2008 and -€10,824 million in 2009.
- CPI inflation is projected to average 4.9% in 2008 and 4.5% in 2009.
- Employment growth is forecast to remain static for 2008, declining by 0.6% in 2009
- The rate of unemployment in Ireland is forecast to rise to 6.0% in 2008 and to 7.1% in 2009. This is up from 4.4% in 2006.
- Net immigration is anticipated to fall to 31,000 in 2008.
- As a result of the overall difficulties being forecast for the Irish economy, it is estimated that outward migration to re-emerge in 2009. A net outflow of 20,000 is forecast for 2009. Without such an outflow, the rate of unemployment would likely rise above 8%.
- Irish exports are forecast to grow by 4.8% in 2008 and by 4.4% in 2008.
- Personal consumption is expected to grow by 1.0 % in 2008 and by 2.0 % in 2009.
- The Economic and Social Research Institute (ESRI)[6] expects a marked slow down in labour force growth to 1.1% in 2010 – 2015 and to 0.7% in 2015 – 2020.
- The Economic and Social Research Institute (ESRI)[7] forecast that investment in the Irish housing sector will fall by 41.4 % in 2008 and by 14.4% in 2009.

2.0 Market Drivers

2.1 Market Drivers – Housing

Housing is a key driver of Irish timber sales, with residential construction responsible for 65% of Irish construction output. Timber frame housing now accounts for 30% of Irish house completions.

2.1.1 Irish Housing Output [8]

A contraction in new house building has been underway since the middle of 2007. After more than a decade of record levels of housing output, Irish house building completions (for 2007) declined by 16.5% on 2006. This led to the first decline in house completions since 1993. The Irish National Accounts estimates for 2007 [Central Statistics Office [9] (CSO)] show that the volume of building and construction output declined by 1.4% last year, the first decline in construction output volumes since 1993.

This reduction in construction output led to a significant reduction in sawn timber imports for 2007[10]. A sharp fall in housing starts and completions has led to a more difficult

[6] ESRI www.esri.ie
[7] ESRI www.esri.ie
[8] A Preliminary Construction Forecast for 2008; Prepared for the Department of the Environment, Heritage and Local Government by DKM Economic Consultants. April 2008. www.environ.ie/en/Publications/StatisticsandRegularPublications/ConstructionIndustryStatistics/FileDownLoad,17367,en.pdf
[9] www.cso.ie
[10] Sawn timber imports are reported in Ireland's EUROSTAT JFSQ return for 2007

trading environment for Irish builders' merchants[11]. At the start of this year, commentators were forecasting housing output in the region of 55,000 units for 2008.

However, more recent forecasts from both the Economic and Social Research Institute (ESRI) and the Construction Industry Federation (CIF)[12] have revised these numbers downwards. These now forecast a rate of house completions of 45,000 in 2008 and just 30,000 in 2009. These forecasts also appear optimistic in the light of recent developments. Moreover, data provided by the Irish Bankers Federation showed that levels of new mortgage applications were down 20% in value and 22% in volume in quarter four, 2007 when compared to similar period in 2006.

Table 1 shows house completions in the Republic of Ireland for the period 1990 – 2009. Estimated house completion data for 2008 & 2009 are taken from a forecast provided by the Irish Construction Industry Federation[13]

Table 1: House completions in the Republic of Ireland (1990 – 2009f) [14] [15]

Year	Total Completions	Growth Rate 1990 = 100
1990	19,539	100.00
1991	19,652	100.58
1992	22,464	114.97
1993	21,391	109.48
1994	26,863	137.48
1995	30,575	156.48
1996	33,725	172.60
1997	38,842	198.79
1998	42,349	216.74
1999	46,512	238.05
2000	49,812	254.94
2001	52,602	269.22
2002	57,695	295.28
2006	68,819	352.21
2004	76,954	393.85
2005	80,957	414.34
2006	93,419	478.12
2007	78,027	399.34
2008 f [16]	45,000	230.31
2009 f	30,000	153.54

[11] Source: Grafton Group http://investor.graftonplc.com/grf/media/press/2008/2008-05-08/
[12] www.cif.ie
[13] www.cif.ie
[14] House completion figures for 2008 & 2009 are forecast by the ESRI (www.esri.ie)
[15] Source: Department of the Environment, Heritage and Local Government; www.environ.ie
[16] House completion figures for 2008 & 2009 are forecast by the ESRI (www.esri.ie)

The reduction in Irish house building will significantly reduce the market for construction timber and for wood based panels.

Timber frame construction is an important part of the Irish construction sector. The sector is a key end user of structural timber and panel products, notably Oriented Strand Board (OSB). According to the Irish Timber Frame Manufacturers Association (ITFMA) [17] the number of timber frame house completions has grown from a market share of 15% in 1999 to a market share of 30% in 2007. However, according to the ITFMA, the Irish timber frame sector had a difficult year in 2007. Irish timber frame output has declined considerably since April 2007. This was due to a combination of the following factors

- Uncertainty regarding Stamp Duty at the end of 2006
- Rising interest rates
- Many housing developments are on hold with only 'completions' being worked on
- Census 2006 (as completed by the Central Statistics Office[18]) showed that 15% of the Irish housing stock was empty
- Falling house prices
- Housing supply exceeds demand
- At the end 2007, there was an estimated twelve months supply of second hand housing stock
- The economic downturn.

These factors have caused a number of timber frame manufacturers to take short time or to cease operations.

[17] www.itfma.ie
[18] www.cso.ie

2.1.2 Repair, Maintenance and Improvement (RMI)

In 2007, the value of the Irish Repair, Maintenance and Improvement sector (RMI) was €6.95 billion. This is split as follows

Table 2: RMI output in the Republic of Ireland (2006 – 2009f)[19]

Sector	2006	2007	2008 f	2009f
Residential RMI € billion	€4.50	€4.67	€5.04	€5.54
Non Residential RMI € billion	€2.50	€2.28	€2.35	€2.42
Total RMI spend € billion	€7.00	€6.95	€7.39	€7.96

- Investment in renovations and extensions to houses remains strong.
- Residential RMI spend is forecast to increase by 7.9% in 2008 and by 10% in 2009.
- Non residential RMI spend is forecast to grow by 3% in 2008 and 2009.

These projections may be optimistic in light of recent economic projections.

2.1.3 Demographics

The 2006 census data[20] from the Central Statistics Office showed that Ireland had a population of 4.2 million. The Irish population is young by European standards, 35% being under the age of 24. As market conditions ease this underlying demand should drive the housing market.

Over the period of a few short years Ireland has moved from being a country of emigration to one of immigration.

- Net immigration for 2007 was 67,300. This is a 6% reduction on 2006.
- Net immigration is anticipated to fall to 31,000 in 2008.
- As a result of the overall difficulties being experienced by the Irish economy, it is estimated that outward migration will re-emerge in 2009. A net outflow of 20,000 is forecast for 2009. Without such an outflow, the rate of unemployment would likely rise above 8%.
- However, immigrants will continue to play an important role in alleviating labour supply bottlenecks in Ireland[21].

[19] http://www.cif.ie/asp/section.asp?s=19
[20] http://www.cso.ie/statistics/popnbyage2006.htm
[21] OECD Policy Brief; Economic Survey of Ireland, 2006

- The Enterprise Strategy Group Report (2004) estimates that demand for new workers over the period up to 2010 could be in the region of 420,000.
- Immigration is expected to account for almost half the increase in labour supply between 2005 and 2010, and for the majority after 2010[22].

New immigrants have been a key driver of housing demand.

2.2 Market Drivers – Euro Sterling Exchange Rate [23]

Since late 2007, the Euro has strengthened against Sterling by 17%, making Irish timber exports less competitive in the UK. The change in Euro/Sterling exchange rate is shown in Table 3. Moreover, forecasts by the Bank of England anticipate no major change in the Euro/Sterling exchange rate to July 2009.

Table 3: Historic & forecast Euro/Sterling exchange rate to July 2009

Period	Euro / £	£ / Euro
Q3 2007	0.680	1.47
Q4 2007	0.709	1.41
Q1 2008	0.758	1.32
Q2 2008	0.794	1.26
Forecasts [24]		
October 2008	0.800	1.25
January 2009	0.806	1.24
July 2009	0.806	1.24

Source: Bank of England, Thompson Datastream & Barclays Bank

2.3 Market Drivers – The UK Construction Market

The UK construction market is a key market for forest products exported from Ireland. This market is especially relevant for the Irish Wood Based Panel (WBP) sector.

However, since late 2007, there has been a major change in market activity in the UK construction sector. New house – building starts have slowed considerably. Conditions in early to mid 2008 have deteriorated rapidly with housing starts and completions well down on 2007, followed by a series of increasingly pessimistic announcements from builders indicating severe problems in the sector [25].

[22] Occupational Employment Forecasts 2012; P. Lunn, N. Doyle & G. Hughes FÁS/ ESRI Manpower Forecasting Studies Report No. 12; ISBN/ISSN No: 0707002559; August 2007 www.esri.ie
[23] Barclays Commercial Interest & Exchange Rate Outlook; July 2008.
[24] Source: Bank of England, Thompson Datastream & Barclays Bank
[25] AMA Research's report "House Building Market - UK 2008 - 2018"

This is echoed by the UK's NHBC [26]. Statistics released in July 2008 by the NHBC [27] shows that there was a 'serious decline' in UK housing outout during the second quarter of 2008. Applications to start new homes total just 20,973; a decrease of 51% on the same three-month period a year ago.
Forecasts for 2008 are being revised constantly. Current estimates are for a decline of around 25% in volume completions in 2008, followed by a further decline of around 4 – 5% in 2009. The sector is expected to make a modest recovery in 2010.

3.0 Policy Measures

The following policy measures influence the Irish forestry & forest products sector.

3.1 The National Development Plan [NDP] (2007-2013)

Over the period from 2007 – 2013, the Irish National Development Plan will invest €184 billion in the Irish economy. The areas in which the NDP will influence the Irish forestry and forest product sector include.

- Support for afforestation and for the integration of forestry with agriculture.
- The cultivation of fast-growing species, for the purposes of biomass production.
- Skills training for farm foresters.
- The mitigation of climate change.
- Funding for the continuation of the COFORD forest research programme.
- Investment in sustainable energy with a view to meeting the target of 15% of electricity production from renewable sources by 2010.
  - A target has been set to achieve 30% co-firing with biomass in the three peat fired power stations by 2015.
  - A target has been set for biomass to supply 12% of the renewable heat market by 2020.
  - For further information see.
    - Energy White Paper: Section 3.3.1 and
    - Bioenergy Action Plan: Section 3.3.3.
- The development of indigenous rural forestry enterprises.
- Support for downstream investment in the forestry sector.
- An investment of €54.7 billion in infrastructure projects.
  - €13.3 billion investment in national roads.
  - €4.3 billion investment in non-national roads.
  - €12.9 billion will be invested in public transport.
- An investment of €21.2 billion in social, affordable and voluntary housing schemes.

These projects will support the expansion of the forest estate, provide significant markets for forest products and will help to develop the Irish bioenergy sector.

[26] NHBC, (the National House-Building Council), is the standard setting body and leading warranty and insurance provider for new and newly converted homes in the UK; www.nhbc.co.uk
[27] http://www.nhbc.co.uk/Newscentre/Recentnews/Name,33966,en.html

3.1.1 Research, Technological Development and Innovation (RTDI)[28] [29]

In 2007, RTDI / Research spending within the Irish forest products sector averaged 2.0%.

Changes in RTDI policies which will affect the Irish forest and forest products sector include.

- The newly established Irish Energy Research Council will advise on priorities for Irish energy research to 2013 and for the longer term. The Council will coordinate existing energy Research Technological Development and Innovation (RTDI) activities and provide analysis and advice.

- Environment Research Sub-Programme
  - Some €93 million will be invested in environmental research over the period 2007 to 2013.

3.1.2 Forest Research[30]

The Irish forest research programme is managed by COFORD (The National Council for Forest Research & Development) [31]. It undertakes research in the following key areas. In 2007, COFORD had a research budget of €4.2 million.

- Forest reproductive material
- Silviculture
- Forest planning and management
- Forest economics and policy
- Forest health and protection
- Forest harvesting and transport
- Wood products
- Wood energy
- Non-wood products
- Forests and climate change
- Forest biodiversity
- Forests and water
- Forests and recreation

In 2007, COFORD in collaboration with Teagasc[32] (the Agricultural Research & Development and Advisory service) undertook a series of wood energy demonstrations[33]

[28] Enterprise – Ireland
[29] Ireland National Development Plan (2007-2013); Government Publications; www.ndp.ie/viewdoc.asp?fn=/documents/NDP2007-2013/NDP-2007-2013-English.pdf
[30] http://www.coford.ie/iopen24/pub/pub/annualreport2007english.pdf
[31] www.coford.ie
[32] www.teagasc.ie/
[33] http://www.woodenergy.ie/iopen24/defaultarticle.php?cArticlePath=12_54

at forest sites across Ireland. These

- Demonstrated biomass harvesting systems under Irish forest conditions
- Established the productivity and costs for biomass harvesting systems &
- Evaluated the amount and quality of biomass fuel produced[34].

A follow on programme, Forest Energy 2008 [35,36] is currently underway. This seeks to

- Demonstrate and develop good practice in the harvesting and processing of biomass and
- Develop quality systems for the production of wood biomass.

See Bioenergy Action Plan for Ireland (section 3.3.3)

3.2 Support for Afforestation

New support measures introduced in 2007 include.

3.2.1 Forestry Environment Protection (Afforestation) Scheme [FEPS][37]

This grant scheme was introduced in late 2006/early 2007.

- It encourages farmers to combine the establishment of high nature-value woodland with their participation in the Rural Environment Protection Scheme (REPS)[38].
  - For the first five years, the premium payable under this scheme exceeds that paid under the afforestation Scheme.
- Farmers planting under FEPS will have to adhere to enhanced environmental objectives, some of which will be mandatory.
- The new scheme operated on a pilot basis during 2007 and is being introduced under the Rural Development Plan (2007-2013).

[34] Harvesting and Processing Forest Biomass for Energy Production in Ireland; The Forest Energy 2006 Programme; Pieter D. Kofman and Tom Kent; COFORD.
www.coford.ie/iopen24/pub/product_info.php?products_id=966605
[35] http://www.woodenergy.ie/iopen24/defaultarticle.php?cArticlePath=12_57
[36] www.woodenergy.ie/iopen24/defaultarticle.php?cArticlePath=12_46
[37] www.agriculture.gov.ie/forestry/files/FEPS_scheme/06-fep%20scheme.pdf
[38] http://www.client.teagasc.ie/forestry/financial_info/fin_suppt/feps_questions.asp

3.3 Energy Policy and Support Measures

The policy framework and support measures for wood energy are detailed below.

3.3.1 Energy White Paper [39]

In 2006, a Green Paper on energy policy was published by the Irish Government. Following a consultation process, a White Paper on energy policy was introduced in early 2007. This outlines Irish Government energy policy for the period 2007-2020. Its primary objectives are:

- Security of supply.
- Environmental sustainability and
- Economic competitiveness.

From a forestry perspective, the sustainable energy sub – programme outlines how the renewable energy sector is to be developed.

[39] www.dcmnr.gov.ie/Energy/Energy+Planning+Division/Energy+White+Paper.htm

3.3.2 Sustainable Energy Sub-Programme

At least €276 million will be invested in the Irish sustainable energy sector over the period of the NDP. This is in support of the targets for sustainable energy including the promotion of renewable energy, energy efficiency and innovation. Key objectives of this programme include.

- A commitment to delivering significant growth in the use of renewable energy in power generation.
- A target of 33% of electricity consumption from renewable sources by 2020.
  - The Irish Electricity Supply Board (ESB)[40] and Bord na Móna[41], its supplier of milled peat will work with the biomass sector to develop the potential of co-firing at the three State owned peat burning stations.
  - A target has been set to achieve 30% co-firing with biomass in the three peat fired power stations by 2015.
  - Biomass firing is set to commence at the Moneypoint generating station by 2010.
  - Biomass power generation projects will be supported through the Renewable Energy Feed-in Tariff (REFIT) scheme.
    - Under this scheme, the tariff price for biomass electricity is set at 7.2 c per kWh compared to 5.7 c per kWh for wind.
    - For biomass CHP, the REFIT tariff has been set at 12 c per kWh.
- The use of biomass in power generation will be supported by means of technology transfer, by investment in specific research & development programmes and by tackling supply issues.
- The need to develop Combined Heat and Power (CHP) and district heating schemes has been identified as an area where energy efficiency could be improved.
  - The White Paper sets the following targets for CHP output
    - 400MW of energy by 2010 and 800 MW by 2020.
    - Biomass energy supplying 12% of the Irish renewable heat market by 2020.

[40] www.esb.ie

[41] Bord na Móna supply milled peat to four thermal power plants, owned by the Electricity Supply Board and by Edenderry Power Ltd., for the generation of electricity. www.bnm.ie

3.3.3 Bio – Energy Action Plan for Ireland [42]

The National Bioenergy Action Plan aims to increase the use of renewable energy in three key sectors: transport, heat and electricity. The objectives of this policy include

- By 2020, a third of all electricity consumed in Ireland will be generated from renewable sources.
- By 2015, all peat fired power generation stations will be co-fired with biomass. The biomass content will be 30%.
  - This will reduce Irish carbon dioxide (CO_2) emissions by 900,000 tonnes per year.
  - To encourage the development of biomass generated electricity, the tariff price for biomass electricity is set at 7.2 cent per kWh compared to 5.7 cent per kWh for wind.
- By 2020, 12% of the total heating (process, space, water, etc.) in all sectors to be provided by renewable sources
  - A target of 5% is set for 2010.
- Within twelve months, new regulations for the energy efficiency of buildings will be introduced.
- New energy efficient designs for schools will be piloted in 40 new schools.

From a forestry perspective key elements of this plan include

- The introduction of an additional 'top up' payments of €80 per hectare for energy crops. This is on top of the EU energy crops premium payment of €45 per hectare.
  - The additional payment of €80 will apply for three years
  - Scheme value: €6 m
- The introduction of a Bioenergy Scheme to encourage farmers to plant new energy crops such as miscanthus and willow.
  - Scheme value: €8 m.
- The Research Stimulus Fund Programme will fund research into biofuels and energy crops
  - Scheme value: €1.5 m.
- The introduction of a grant scheme for wood biomass harvesting machinery to include wood chippers and forest residue bundlers.
  - Scheme value: €1.2 m.
- The encouragement of a rate of afforestation that is sufficient to meet increased market demand for wood fibre in the medium to long term.
  - This will be supported by the introduction of a FEPS scheme to facilitate increased levels of afforestation.
    - For further details see section 3.2.1.
- Develop and support the wood energy chain to enable it to deliver quality wood fuel at a competitive price.

[42] www.dcmnr.gov.ie/NR/rdonlyres/4FFF6234-26CA-46B5-878AA04A7288DA4/0/FinalBioenergyReport.pdf

3.3.4 Promoting Wood Energy [43]

In 2006, the Irish Government introduced a five year capital programme to underpin the growth of the Irish renewable heat sector. The grant schemes for this programme have been developed in conjunction with Sustainable Energy Ireland (SEI). The total funding package for this programme is €89 million.

The grant schemes contained within this programme are detailed below

Combined Heat and Power (CHP) Grant Scheme [44]

This programme provides grants for the installation of CHP units. It aims to develop small-scale CHP units (up to one mega watt) fired by fossil fuels, which can be deployed in buildings having a substantial heat requirement. A second strand, which covers grant aid for biomass fired CHP was launched in 2007[45]. An indicative allocation of €11M was made for a CHP programme to run in the 2006 to 2010 time frame.

This programme aims to deliver 10 – 15 MWe Biomass CHP, and 10 – 20 MWe of electricity from small scale fossil fuel CHP. There is no limit on the size of installations that can be grant-aided if they are fuelled by biomass.

In order to stimulate the deployment of CHP via conventional installation or an ESCO model, SEI has expanded the scope of the feasibility study grant to include package applications from CHP suppliers and ESCOs in certain market segments

To date, no biomass CHP projects have been commissioned under this scheme. However, a number are in the early stages of development.

[43] Section 3.3 provides details on Ireland's energy policy and on the promotion of bioenergy / renewable energy.
[44] www.sei.ie/chpgrants/
[45] http://www.sei.ie/index.asp?locID=353&docID=-1

Greener Homes Scheme (GHS) [46]

This grant scheme was established in 2006. It allows householders to obtain grants for the installation of renewable heat technologies including wood pellet stoves, boilers, solar panels and geothermal heat pumps.

By August 2007, 16,000 grants to a value of €47 million were approved under the GHS. The technologies and the capacity supported by this scheme are detailed below.

Table 4: Technology & capacity supported by the Greener Homes Scheme (GHS)

Technology Supported	Estimated Capacity Supported	Installed to Date
Wood chip / pellet boilers	5,500 systems	3,475 systems
Solar thermal systems	30,000 m^2	15,500 m^2
Heat pump systems	4,000 systems	2,530 systems

Source: Sustainable Energy Ireland www.sei.ie

Phase II of the Greener Homes Scheme was launched on 1st October 2007.

ReHeat Programme [47]

This grant support scheme enables community groups, commercial sector, public sector and industrial sector organisations to obtain grants for the installation of wood chip and wood pellet boilers. Grant aid is up to 30% of overall cost.

By July 2008, 103 projects had been completed under this scheme with a total output of 42 megawatts.

[46] www.sei.ie/greenerhomes/
[47] www.sei.ie/reheat/

Renewable Energy Feed-In Tariff (REFIT) [48]

The REFIT scheme was launched in May 2006. It provides support to renewable energy projects over a fifteen year period. The new support mechanism differ from the previous programme in that it operates as a fixed feed in tariff mechanism rather than as a competitive tendering process. Applicants in REFIT must have planning permission and a grid connection offer for their projects and they will then be able to contract with any licensed electricity supplier up to the notified fixed prices.

The fixed price tariffs are:

- Large wind energy (over 5 Megawatts): 5.7 cent per Kilowatt hour
- Small wind energy (under 5 Megawatts): 5.9 cent per Kilowatt hour
- Biomass (landfill gas): 7.0 cent per Kilowatt hour
- Hydro and other biomass technologies: 7.2 cent per Kilowatt hour

For biomass CHP, the REFIT tariff has been set at 12 cent per kWh

3.3.5 Energy Performance of Buildings Directive (EPBD) [49]

The EU Directive on the Energy Performance of Buildings (EPBD) was transposed into Irish law on 4th January 2006. The directive will be implemented on a phased basis over the next three years.

As part of the EPBD, a Building Energy Rating (BER)[50] certificate will be required at the point of sale or rental of a building, or on completion of a new building, and will be implemented as follows:

- A BER is required for new dwellings constructed on or after 1st January 2007.
- A BER is required for new non-domestic buildings constructed on or after 1st July 2008.
- A BER is required for existing buildings when offered for sale or letting on or after 1st January 2009

A lead-in period is allowed for each of the above steps.

[48] http://www.sei.ie/index.asp?docID=-1&locID=1213
[49] www.sei.ie/epbd/
[50] Building Energy Rating (BER) is a requirement of the EU Directive on the Energy Performance of Buildings (2002/91/EC of 16th December 2002), which has now been transposed in Ireland by the European Communities (Energy Performance of Buildings) Regulations 2006 (S.I. No. 666 of 2006)

3.4 National Climate Change Strategy (2007 – 2012) [51]

The Irish forest sector has a key role to play in addressing climate change, through carbon sequestration and through the development of renewable energy resources. This includes.

- Forest areas established as a result of grant aid under the State/EU funded afforestation schemes since 1990 are expected to contribute an annual average emission reduction of 2.074 million tonnes of carbon dioxide (CO_2) over the Kyoto period.

- There is significant potential for wood fuel to displace fossil fuel, particularly in the generation of heat.
  - For further information see section 3.3 of this report.

- Support measures have been designed to assist the development of the supply. chain required to process and supply wood biomass to end-users.
  - For further information see section 3.3 of this report.

[51] www.environ.ie/en/PublicationsDocuments/FileDownLoad,1861,en.pdf

4.0 Developments in Forest Products Markets

Developments in the Irish forestry and forest products sector are outlined below.

4.1 Irish Roundwood Harvest (2007)

In 2007, roundwood available for processing in the Republic of Ireland totalled three million cubic metres (m^3). 87% of this was harvested by Coillte, with the balance supplied by imports and by the private forest sector. The split between sawlog, pulp and stake (for 2007) is shown in Table 5 [52].

Table 5: Roundwood available for processing in the Republic of Ireland by assortment (2007)

Product class	Top diameter (cm)	Roundwood available for processing (000 m^3 OB)
Sawlog	≥ 14	1,934
Pulpwood	7 – 13	889
Stakewood	7 – 13	180

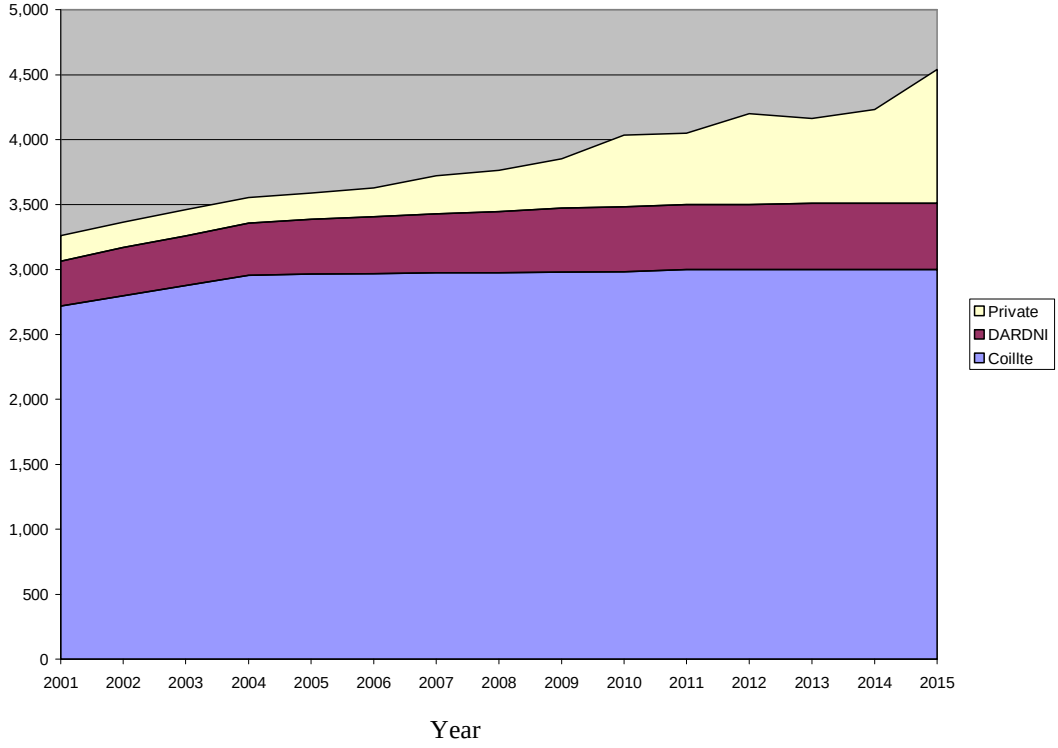
In 2007,

- demand for sawlog declined due to a reduction in Irish construction activity
- demand for pallet was driven by strong UK demand for fencing and pallet products.
- the four wood based panel mills in the Republic of Ireland operated at close to capacity, driving demand for pulp and for wood residues.

[52] This harvest excludes firewood.

A forecast of the roundwood harvest available in Irish forests over the period 2001 – 2015 is detailed below (this includes harvest output from the Northern Ireland Forest Service – DARDNI[53]).

Figure 1: Combined roundwood production forecast for Ireland[54] (2001-2015) in underbark cubic metres (m^3)



Source: Forecast of Roundwood Production from the Forests of Ireland 2001-2015. Gallagher, G. and O'Connell, J. COFORD Dublin.

COFORD is currently funding work at University College Dublin (UCD) to complete a forecast for the private forest estate; it is estimated it will be completed by mid 2009.

[53] www.dardni.gov.uk/

[54] This production forecast is in cubic metres underbark. It includes the timber harvest from forests in Northern Ireland.

4.2 Sources & Uses of Wood Fibre in the Republic of Ireland (2007)[55]

The wood fibre sources which provide the Irish forest industry with its raw material are shown in Table 6, while the products produced by the sector are shown in Table 7.

Table 6: Estimated sources of wood fibre in the Republic of Ireland (2007)[56]

Fibre Source	**Volume m^3 (OB)**
Roundwood	3,003,000
Sawmill residues	966,000
Wood residues produced by the Irish wood based panel (WBP) processing sector	125,000
Recycled Wood Fibre (RWF)	264,000
Totals	4,358,000

Table 7: Estimated uses of wood fibre in the Republic of Ireland (2007)

Uses of Wood Fibre in the Republic of Ireland	**Volume m^3 (OB)**
Wood fibre use by the Irish sawmilling sector	1,934,000
Wood fibre use by the Irish WBP sector	1,673,000
Wood fibre use by Irish producers of round stakes	180,000
Wood biomass use by the Irish forest products sector	324,000
Other Uses	
Production of horticultural bark mulch	132,000
Production of wood chip for commercial biomass use	20,000
Residue exports	95,000
Totals	4,358,000

[55] Source: EUROSTAT JWEE report for Ireland (2007) & EUROSTAT JFSQ report for Ireland (2007)
[56] Wood fibre that is reused is counted twice in this model (total fibre source = total fibre use).

4.3 Wood Residues

The wood residues arising within the Irish forest products sector are outlined below. These are primarily used as feedstock for sawmill kilns and for the wood based panel sector (WBP). Recovered wood fibre is increasingly being used for wood energy and for the manufacture of particleboard.

Table 8: Wood residue output for the Republic of Ireland (2007)

Wood Residue Type	Volume[57] in 000 m^3
Bark	271
Chips & Particles	687
Wood Residues	229
Recovered Wood	279
Total Residue Output	1,466

Source: EUROSTAT JWEE for Ireland (2008)

4.4 Certification

4.4.1 Certified Forests

Since May 2001, Coillte's forests have been certified to the Forest Stewardship Council (FSC) scheme. In 2007, Coillte had its Forest Stewardship Council (FSC) certificate for responsible forest management renewed until 2012 by Soil Association Woodmark, an independent firm of environmental auditors[58]. A small number of privately-owned forests have also been certified by FSC.

4.4.2 Certified Forest Products

All of the major sawmills and panel mills have chain-of-custody procedures. The demand for certified timber products in the Irish market is still relatively small and there is no strongly developed public procurement policy for them.

[57] Roundwood equivalent
[58] http://www.coillte.ie/fileadmin/user_upload/pdfs/2007_Annual_Report/CEO_review.pdf

4.5 Value Added Products – Furniture

- In 2007, the Irish furniture sector had a market value of €1.7 billion[59]
  - The household furniture market was worth €1.0 billion[60]
  - The contract furniture market was worth €0.7 billion
- Irish companies have a 30% share of this market
- To compete on home and export markets, Irish furniture manufacturers have moved to outsource their production.

The value of wooden furniture imported and exported to / from Ireland for 2007 are detailed in table 9.

Table 9: The value of wooden furniture imports & exports in Ireland (2007)

Category	Import value for 2007 € million	Export value for 2007 € million
Wooden furniture	€434	€47

Source: EUROSTAT JFSQ for Ireland (2007)

[59] Source: Enterprise – Ireland www.enterprise-ireland.com
[60] http://www.enterprise-ireland.com/SourceIreland/Ireland/Furniture.htm

4.6 Sawn Timber

A reduction in Irish construction output led to a significant reduction in sawn timber imports for 2007 [61].

- 55% of this market is served by imports, with the balance supplied by Irish sawmills.

4.6.1 Irish Sawn Timber Market Size

In 2007, the Irish market consumed over 1.3 million cubic metres (m^3) of sawn timber. This was a 17.5% reduction on 2006. This is detailed below.

Table 10: Irish sawn timber market size (2006–2007)

Sector	Volume of Sawn Softwood in Cubic Metres [2006]	Volume of Sawn Softwood in Cubic Metres [2007]
Domestic production Softwood	1,091,000	984,000
Domestic production Hardwood	3,000	4,000
Exports	-393,000	-381,000
Imports	910,916	724,000
Market size in m^3	1,611,916	1,331,000

Source: CSO Trade Statistics www.cso.ie
EUROSTAT JFSQ for Ireland (2007 & 2008)

- Irish sawmills supply 45% of the Irish market for sawn timber.
- In 2007, they exported 381,000 cubic metres of sawn timber. This generated export earnings of €71 million.
- 50% of pallet and fencing production is exported to the UK.

[61] Sawn timber imports are reported in Ireland's EUROSTAT JFSQ return for 2007

4.6.2 Irish Sawn Softwood Output for 2007 [62]

Ten sawmills form the core of the Irish sawmill sector. These provide a key outlet for sawlog and stakewood harvested from Irish forests. In 2007, Irish sawmills utilised 1.934 million cubic metres of roundwood. Irish sawmill output for 2007 is estimated at 984,000 cubic metres of sawn softwood.

The primary products produced include construction timber, pallet and fencing products. While Irish construction timber is largely sold on the home market, pallet and fencing products make up the bulk of sawn timber exports.

4.6.3 Sawn Softwood Imports

- Demand for sawn softwood declined significantly in 2007, driven by a reduction in house building output.
- In 2007, 600,000 cubic metres of sawn softwood was imported into Ireland. This had a value of €177 million.
- 92% of this volume is supplied by the ten exporting countries detailed below.

Table 11: Countries exporting sawn softwood to Ireland in 2007

Exporting country	Volume of sawn softwood exported to Ireland in 2007 in 000 m^3
Sweden	122
Great Britain	80
Germany	72
Finland	70
Russia	67
Latvia	63
Northern Ireland	47
Brazil	18
Canada	17
Austria	7

Source: CSO Trade Statistics www.cso.ie

[62] EUROSTAT / FAO Joint Forest Sector Questionnaire (JFSQ) for Ireland for 2007

4.7 Sawn Hardwood

- Domestic sawn hardwood production is small producing just 4,000 cubic metres of sawn hardwood timber in 2007.
- Sawn hardwood imports for 2007 totalled 124,000 cubic metres to a value of €74 million.
- 93% of this volume is supplied by the ten countries detailed below.

Table 12: Countries exporting sawn hardwood timber to Ireland in 2007

Exporting Country	Volume of Sawn Hardwood Exported to Ireland in 2007 in 000 m^3
Cameroon	35
United States	27
Ivory Coast	11
Northern Ireland	11
China	10
Canada	5
Sweden	5
Great Britain	4
Ghana	3
Germany	3

Source: CSO Trade Statistics www.cso.ie
EUROSTAT JFSQ for Ireland (2008)

4.8 Wood Based Panels (WBP) [63]

- In 2007, the Irish panel products sector had a combined output of 918,000 cubic metres.
  - The estimated wood fibre requirement of WBP mills in the Irish Republic was 1.7 million cubic metres.
  - Products manufactured by the sector include chipboard / particleboard, Oriented Strand Board (OSB), Medium Density Fibreboard (MDF) and moulded door facings.
  - The sector is export orientated, selling more than 75% of its product in overseas markets.
  - Key export markets for Irish wood based panel producers are the UK, Northern Ireland, Belgium, the Netherlands, France and Germany.
  - Irish WBP exports for 2007 totalled €262 million
  - The Irish wood based panel sector comprises the companies detailed in Table 13.

Table 13: Wood based panel manufacturers in the Republic of Ireland

Company	Established	Product(s)	Location
Finsa Forest Products [64]	1984	Chipboard / Particleboard	Scariff, Co Clare
Masonite Ireland Ltd [65]	1997	Moulded door facings	Drumsna, Co Leitrim
Medite Europe [66]	1983	Medium Density Fibreboard (MDF)	Clonmel, Co Tipperary
Smart*Ply* Europe [67]	1995	Oriented Strand Board (OSB)	Slieverue, Co Kilkenny

The market environment for both OSB and MDF is expected to be challenging in 2008 as a result of softening in demand and the substantial strengthening of the Euro against Sterling. Prices are projected to fall back significantly from the peak achieved in the latter part of 2007[68].

[63] EUROSTAT / FAO Joint Forest Sector Questionnaire (JFSQ) for Ireland for 2007
[64] The chipboard plant at Scariff, Co Clare was formerly operated by Aicher GmbH/ Irish firm—Chipboard Ltd. It first opened in 1965.
[65] http://www.masonite.com/
[66] Medite – Europe Ltd was established in Clonmel by the Medford Corporation in 1983. It was acquired in November 2006 as a subsidiary of Coillte Teoranta.
[67] The OSB mill at Slieverue was first established as a joint venture between Coillte and Louisiana – Pacific in 1995. Coillte acquired full ownership of the business in May 2002.
[68] http://www.coillte.ie/fileadmin/user_upload/pdfs/2007_Annual_Report/CEO_review.pdf

4.8.1 Developments in the Irish WBP Sector

- In March 2008, Medite Europe Ltd.[69] announced that they had agreed a supply agreement with Metso Panelboard AB. to provide new fibre preparation equipment for its Clonmel facility. This will enable Medite to significantly increase fibre production, whilst maintaining existing levels of electricity and steam consumption[70].

4.9 Pulp & Paper [71]

- All pulp and paper used in the Irish market is imported.
- Pulp & paper imports represent 54% of Irish forest product imports (by value).
- In 2007, 546,000 metric tonnes of pulp and paper products were imported into Ireland.
- These imports were worth €467 million.
- 458,000 tonnes of recovered paper was exported from Ireland for recycling.

4.10 New Irish Timber Frame Standard – I.S. 440 [72]

A new Irish Timber Frame Standard has been developed by the National Standards Association of Ireland (NSAI) [73] with technical assistance from the Building Research Establishment (BRE), UK [74]. Representatives of the Irish timber frame sector have had an active input into the development of this new standard.

I.S. 440 specifies requirements for materials, design, manufacture, construction details, site work and quality control for platform timber frame construction. The on-site fabrication of timber frame panels is outside the scope of this Irish Standard.

The Draft Irish Standard I.S. 440 "Timber frame dwellings" is currently being submitted to public enquiry for a period from 21st July, 2008 to 26th September, 2008.

[69] www.medite-europe.com/
[70] http://www.medite-europe.com/en/news_item.php?item=36
[71] EUROSTAT / FAO JWEE Return for Ireland for 2008
[72] http://www.nsai.ie/index.cfm/area/news/action/article/information/hayesptimber
[73] www.nsai.ie
[74] www.bre.co.uk

5.0 Other Issues

5.1 National Forest Inventory (NFI) [75]

- The first phase of the national forest inventory has been completed and shows a standing volume of 70 million cubic metres.
- Collection of field data for the NFI was completed in November 2006. It is the first statistical inventory of all forests in the Republic of Ireland.
- Final results from the current phase of the NFI are outlined below.

Table 14: Summary results from Ireland's National Forest Inventory [NFI] (2004 – 2006)

Item	Area (000 ha)	Percentage
Forest cover	697.73	10% of Irish land area
Ownership		
Public ownership	397.46	57%
Private ownership	300.38	43%
Species Composition		
Conifer	462.58	73.9%
Broadleaf	151.95	24.3%
Temporarily unstocked	11.22	1.8%

Source: http://www.agriculture.gov.ie/forestry/presentations/NFI_Results.pdf

5.2 Biomass / Bio – Energy [76]

- There is growing interest in the Irish BioEnergy sector. This is being promoted by the SEI and COFORD schemes as detailed in section 3.3 of this report.
- The output[77] of the Irish biomass sector is currently dominated by the wood processing sector. In 2007,
  - The Irish forest industry used 382,000 tonnes of wood biomass.
  - The heat generated by the Irish Forest products sector for its own use is estimated to be 3,868 Tera Joules (TJ).
  - The electricity generated by the Irish Forest products sector for its own use is estimated to be 51 Tera Joules (TJ).
  - The total energy produced by the Irish forest sector in 2007 is estimated at 93,532 Tonnes of Oil Equivalent (TOE).

[75] www.agriculture.gov.ie/index.jsp?file=forestry/presentations/NFI_presentatoins.xml
[76] Harvesting and Processing Forest Biomass for Energy Production in Ireland; The Forest Energy 2006 Programme; Pieter D. Kofman and Tom Kent; COFORD. www.coford.ie/iopen24/pub/product_info.php?products_id=966605
[77] EUROSTAT / FAO Joint Forest Sector Questionnaire (JFSQ) for Ireland for 2007

5.3 Biomass / Bio – Energy for Domestic & Commercial Use

The use of wood biomass in Ireland is dominated by the forest products sector, which uses it for process drying and for energy purposes.

However, since 2006, the use of wood energy by commercial and domestic users has risen considerably. This is outlined in Table 15.

Table 15: Use of wood biomass in Ireland (2007) [78]

Biomass Type	End Use	Unit (000)	Usage
Wood Pellets	Domestic Heating	Tonnes / Year	25
Wood Briquettes	Domestic Heating	Tonne / Year	6
Wood Chips	Commercial Heating	m^3 / Year	20

Source: EUROSTAT JWEE Report for Ireland (2008)

For 2007, the estimated heat output of the domestic wood based biomass sector was 908 Tera Joules (TJ) [79]

5.4 Engineered Wood Products (EWP) [80]

Engineered wood products include I Beams, Glulam and Parallam. They are largely used by timber frame companies to replace large dimension Timber and steel. A recent COFORD[81] report found that

- The most commonly used EWP are I-joists.
  - Market information indicates that in 2004, timber frame manufactures used 0.7 million linear metres of I-joists.
  - The approximate price was €5 per linear metre. This is twice the price of a similar sized solid timber joist.
- Metal web joists are the only EWP being manufactured in any quantity in Ireland.
- Glulam use was widespread but volumes small.

[78] Source: EUROSTAT JWEE Report for Ireland (2007)
[79] EUROSTAT JWEE Report for Ireland (2007)
[80] Engineered Wood Products Opportunities and Threats, COFORD Draft Report; ISBN 1 902696 58 1; www.coford.ie
[81] Engineered Wood Products Opportunities and Threats, COFORD Draft Report; ISBN 1 902696 58 1; www.coford.ie

5.5 Coillte exits Non Core Businesses

In 2007, Coillte (the Irish State Forestry Company) exited non core businesses. These included Christmas trees, tree surgery and Griffner Coillte, its timber frame joint venture with Griffner Haus of Austria[82].

5.6 Private Sector Forecast

COFORD is currently funding work at University College Dublin (UCD) to complete a forecast for the private forest estate. It is estimated that this forecast will be completed by mid 2009.

82 http://www.coillte.ie/about_coillte/news_archive/latest_news_2007/griffnerhaus_acquires_full_ownership_of_griffner_coillte/

6.0 Tables

6.1 Economic Indicators

6.1.1 An Economic Overview of the Irish Economy (2001 – 2009)

Criteria / Year	**2001**	**2002**	**2003**	**2004**	**2005**	**2006**	**2007**	**2008 f**	**2009f**
Output Real Annual Growth %									
▪ Government Spending	9.8	7.1	3.2	1.8	4.6	5.3	6.7	4.0	2.0
▪ Personal Consumption	5.4	3.8	3.2	3.8	6.6	5.7	5.4	1.0	2.0
▪ Exports	8.6	4.5	0.5	7.3	3.9	4.4	8.2	4.8	4.4
▪ Imports	7.2	2.4	-1.2	8.6	6.5	4.4	6.4	2.7	3.0
▪ Consumer Price Index (CPI)	4.9	4.6	3.5	2.2	2.4	4.0	4.9	4.5	3.0
▪ Gross Domestic Product (GDP)	5.7	6.0	4.3	4.3	5.5	5.7	5.3	-0.4	2.0
▪ Gross National Product (GNP)	3.8	2.8	5.5	3.9	5.3	6.5	4.5	-0.4	1.9
Expenditure on Gross Domestic and Gross National Product									
▪ GDP at Market Prices € m	€116,800	€129,900	€138,900	€147,600	€161,163	€175,794	€185,786	€185,967	€192,119
▪ GNP at Market Prices € m	€97,800	€106,200	€117,200	€124,400	€135,914	€150,281	€157,898	€157,841	€162,901
Other Economic Variables									
▪ Unemployment (As % of Labour force)	4.0	4.6	4.7	4.5	4.4	4.4	4.5	6.0	7.1

Source: ESRI Quarterly Economic Commentary – Summer 2008 www.esri.ie
f: Figures for 2008 and 2009 are forecast

6.1.2 Irish Construction Output (2000 – 2009)

Sector / Year	2000	2001	2002	2003	2004	2005	2006	2007	2008f	2009f
Residential € billion	€9,497	€10,954	€11,928	€14,645	€18,055	€20,873	€23,400	€22,202	€13,004	€11,129
Non-residential € billion	€3,820	€3,710	€2,962	€2,731	€2,958	€3,422				
Productive infrastructure € billion	€3,063	€3,745	€4,581	€4,762	€4,831	€5,234				
Social infrastructure € billion	€1,207	€1,517	€1,823	€1,684	€1,750	€2,027				
Total output € billion	€17,587	€19,926	€21,294	€23,820	€27,595	€31,556	€36,000	€36,480	€28,593	€26,865
Percentage Residential	54%	55%	56%	61%	65%	66%	65%	61%	45%	41%
Housing Construction % GNP	9.2%	9.8%	10.2%	11.8%	13.6%	15.4%	15.5%	13.98%		
Annual House Building Cost Index 1991 = 100	141.0	161.5	171.8	176.5	181.5	186.9	194.2	204.2		
Increase on the previous year			6.4%	2.7%	2.8%	3.0%	3.9%	5.1%		

Source: Central Statistics Office www.cso.ie
ESRI Quarterly Economic Commentary - Summer 2008 www.esri.ie

6.1.3 Forest Products Production in Ireland (2005 – 2009)

Category	Unit	2005	2006	2007	2008 f	2009 f
Roundwood	1000 m^3	2,649	2,671	2,710	2,826	3,007
Coniferous	1000 m^3	2,630	2,654	2,682	2,786	2,949
Non-coniferous	1000 m^3	19	17	27	30	34
Wood fuel, including wood for charcoal	1000 m^3	20	15	32	45	63
Coniferous	1000 m^3	5	5	12	17	24
Non-coniferous	1000 m^3	14	11	20	28	39
Industrial roundwood (wood in the rough)	1000 m^3	2,629	2,656	2,678	2,781	2,944
Coniferous	1000 m^3	2,625	2,650	2,671	2,771	2,932
Non-coniferous	1000 m^3	4	6	7	10	12
Sawlogs and veneer logs	1000 m^3	1,763	1,789	1,725	1,859	1,952
Coniferous	1000 m^3	1,759	1,782	1,718	1,849	1,940
Non-coniferous	1000 m^3	4	6	7	10	12
Pulpwood (round & split)	1000 m^3	759	760	828	800	850
Coniferous	1000 m^3	759	760	828	800	850
Non-coniferous	1000 m^3	0	0	0	0	0
Other industrial roundwood	1000 m^3	107	107	125	112	130
Coniferous	1000 m^3	107	107	125	112	130
Non-coniferous	1000 m^3	0	0	0	0	0
Wood chips and particles	1000 m^3	562	606	545	633	664
Wood residues	1000 m^3	236	254	229	271	285
Sawnwood	1000 m^3	1,015	1,094	985	1,072	1,116
Coniferous	1000 m^3	1,014	1,091	981	1,067	1,110
Non-coniferous	1000 m^3	1	3	4	5	6
Of which: tropical	1000 m^3	0	0	0	0	0
Wood-Based Panels (WBP)	1000 m^3	875	937	918	910	935
Particle board (including OSB)	1000 m^3	435	436	440	400	400
Of which: OSB	1000 m^3	307	308	310	280	280
Fibreboard	1000 m^3	440	501	479	510	535
Hardboard	1000 m^3	51	88	83	85	85
MDF (Medium Density Fibreboard)	1000 m^3	389	413	396	425	450
Insulating board	1000 m^3	0	0	0	0	0
Recovered paper	1000 mt	443	444	458	472	486
Paper and paperboard	1000 mt	45	0	0	0	0
Packaging materials	1000 mt	45	45	45	45	45
Case materials	1000 mt	45	45	45	45	45

Source: EUROSTAT / Irish JQ1 Return (2008)
F: figures for 2008 & 2009 are forecast

6.1.4 Irish Timber Imports and Exports (2007)

The breakdown of Irish forest product imports and exports for 2007 are shown in Table 16

Table 16: Irish timber imports and exports (2007)

Item	**Unit of measurement**	**Import volume**	**Import value €000**
Sawnwood	1,000 m^3	724	€251,200
Wood Based Panels (WBP)	1,000 m^3	358	€145,706
Pulp & Paper Products	1,000 mt	546	€466,526
Totals for 2007			€863,432
Item	**Unit of measurement**	**Export volume**	**Export value €000**
Sawnwood	1,000 m^3	381	€70,977
Wood Based Panels (WBP)	1,000 m^3	757	€262,410
Pulp & Paper Products	1,000 mt	85	€92,026
Totals for 2007			€425,413

Notes
Source: The Central Statistics Office (CSO) www.cso.ie
mt: metric tonne
m^3: cubic metre

In 2007, imports of forest products exceeded €863 million. Pulp and paper products were responsible for over 50% of this volume with sawn timber and wood based panels making up the remainder

Wood based panels are responsible for 62% of the value of Irish timber exports. The majority of the timber produced by Irish sawmills is sold on the home market. In 2007, sawn timber exports from Ireland were worth €71 million. These exports are dominated by pallet and by fencing products

A reduction in Irish construction output led to a significant reduction in sawn timber imports for 2007 [83].

[83] Sawn timber imports are reported in Ireland's EUROSTAT JFSQ return for 2007

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