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Historical Trends of Sawn Softwood Markets and Subregional
Forecasts for Europe and North America



Introduction

- Who we are and what we do
 - UNECE/FAO Forestry and Timber Section aims to support sustainable forest management in its region through monitoring and reporting
 - We work in the areas of forest products markets, forest resources, outlook, wood energy and policy issues
 - We collect and publish data, provide analysis and a forum for discussion of forest sector
- Outline of presentation
 - Review historical long-term global trends
 - Provide short-term forecasts (2011/2012) for Europe and North America
 - Review long-term forecasts (2030) for Europe
 - Timber prices



ECE Region Map

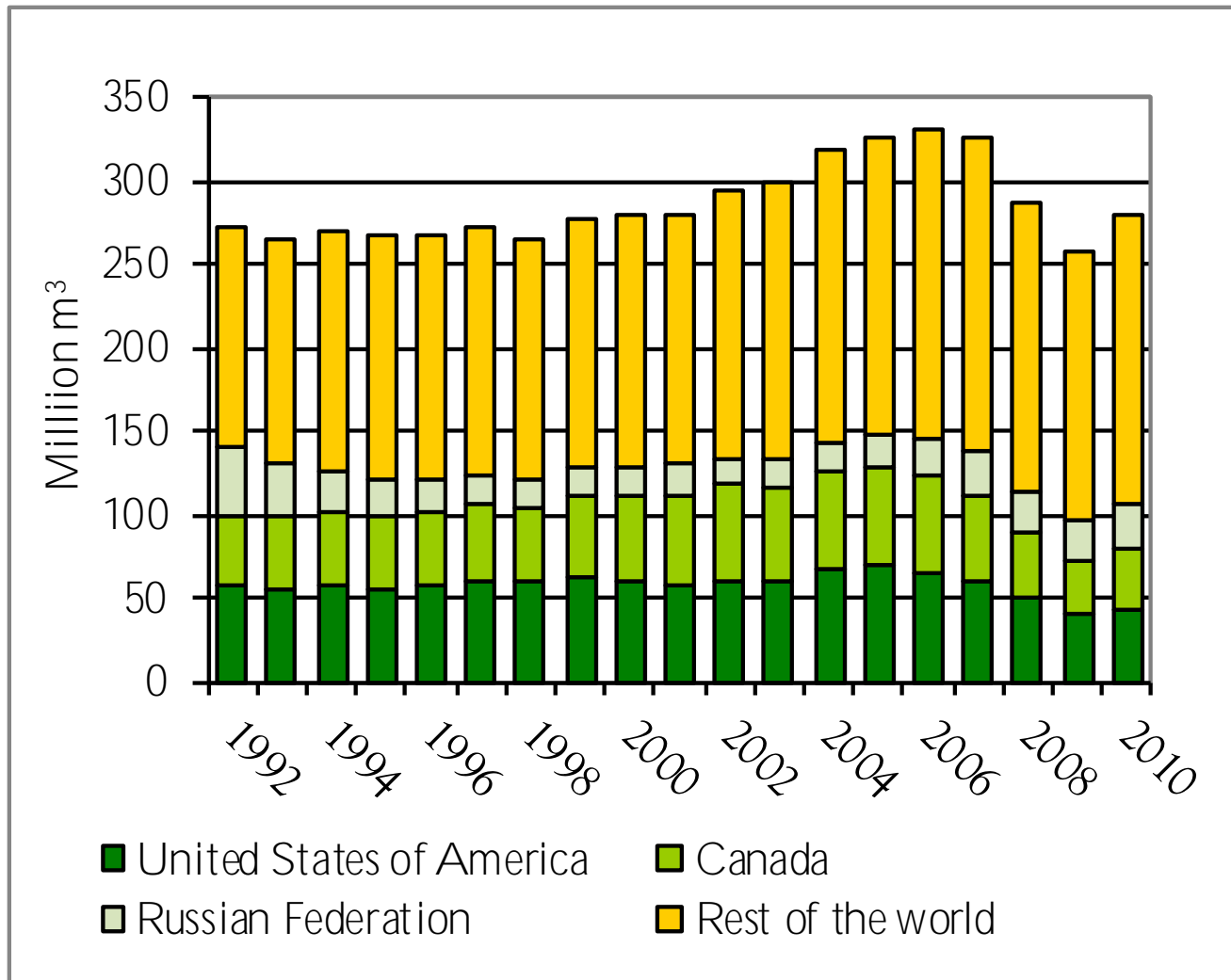


- Europe subregion
- Commonwealth Independent States (CIS) subregion
- North America subregion

Europe subregion (EU*)	
Albania	
Andorra	
Austria*	
Belgium*	
Bosnia and Herzegovina	
Bulgaria*	
Croatia	
Cyprus*	
Czech Republic*	
Denmark*	
Estonia*	
Finland*	
France*	
Germany*	
Greece*	
Hungary*	
Iceland	
Ireland*	
Israel	
Italy*	
Latvia*	
Liechtenstein	
Lithuania*	
Luxembourg*	
Malta*	
Monaco	
Montenegro	
Netherlands*	
Norway	
Poland*	
Portugal*	
Romania*	
Romania*	
San Marino	
Serbia	
Slovakia*	
Slovenia*	
Spain*	
Sweden*	
Switzerland	
The FYR of Macedonia	
Turkey	
United Kingdom*	
Commonwealth Independent States (CIS) subregion	
Armenia	
Azerbaijan	
Belarus	
Georgia	
Kazakhstan	
Kyrgyzstan	
Republic of Moldova	
Russian Federation	
Tajikistan	
Turkmenistan	
Ukraine	
Uzbekistan	
North America subregion	
Canada	
United States of America	



Sawn Softwood Production: 1992-2010

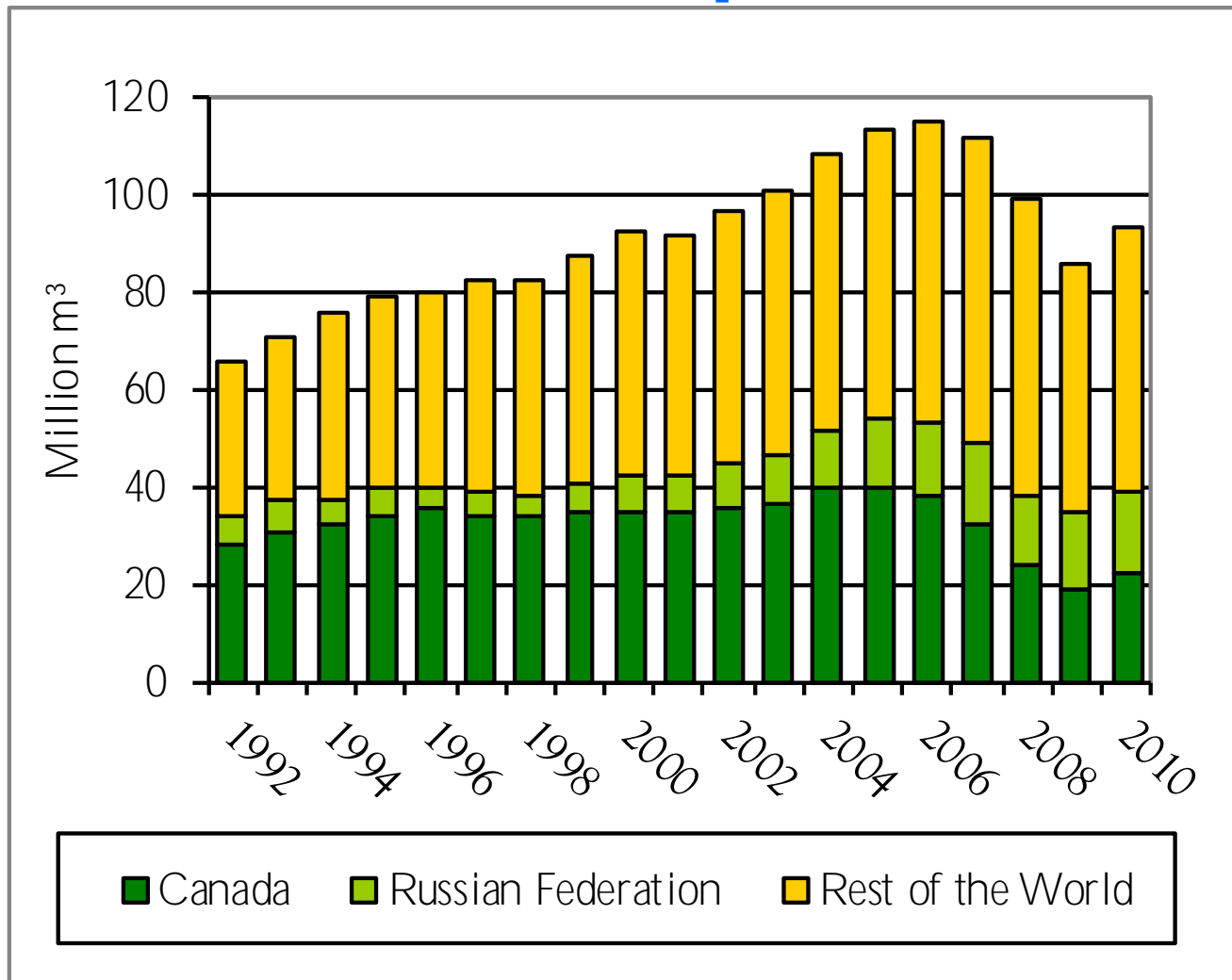


Source: FAO, 2012

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Sawn Softwood Exports: 1992-2010

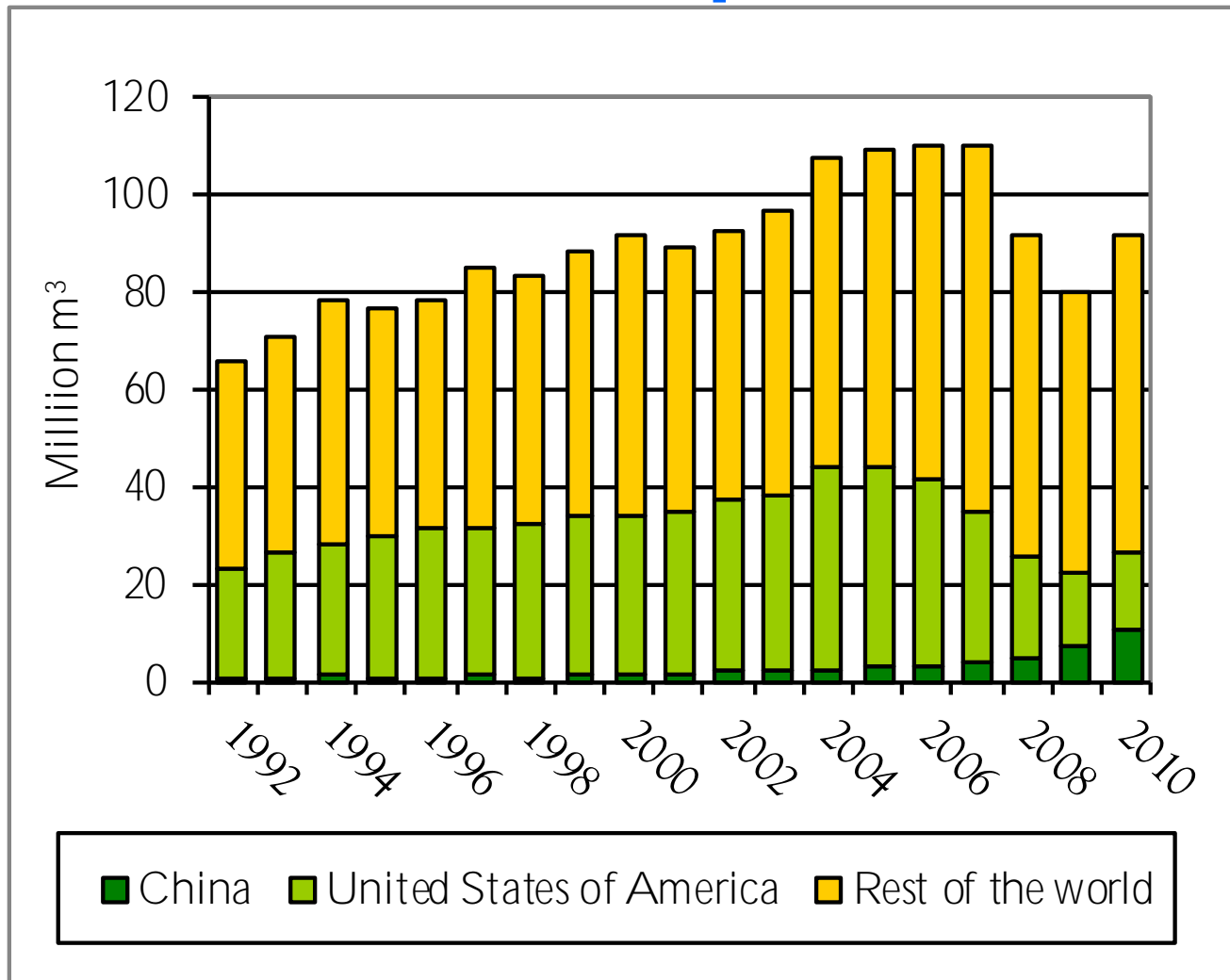


Source: FAO, 2012

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Sawn Softwood Imports: 1992-2010

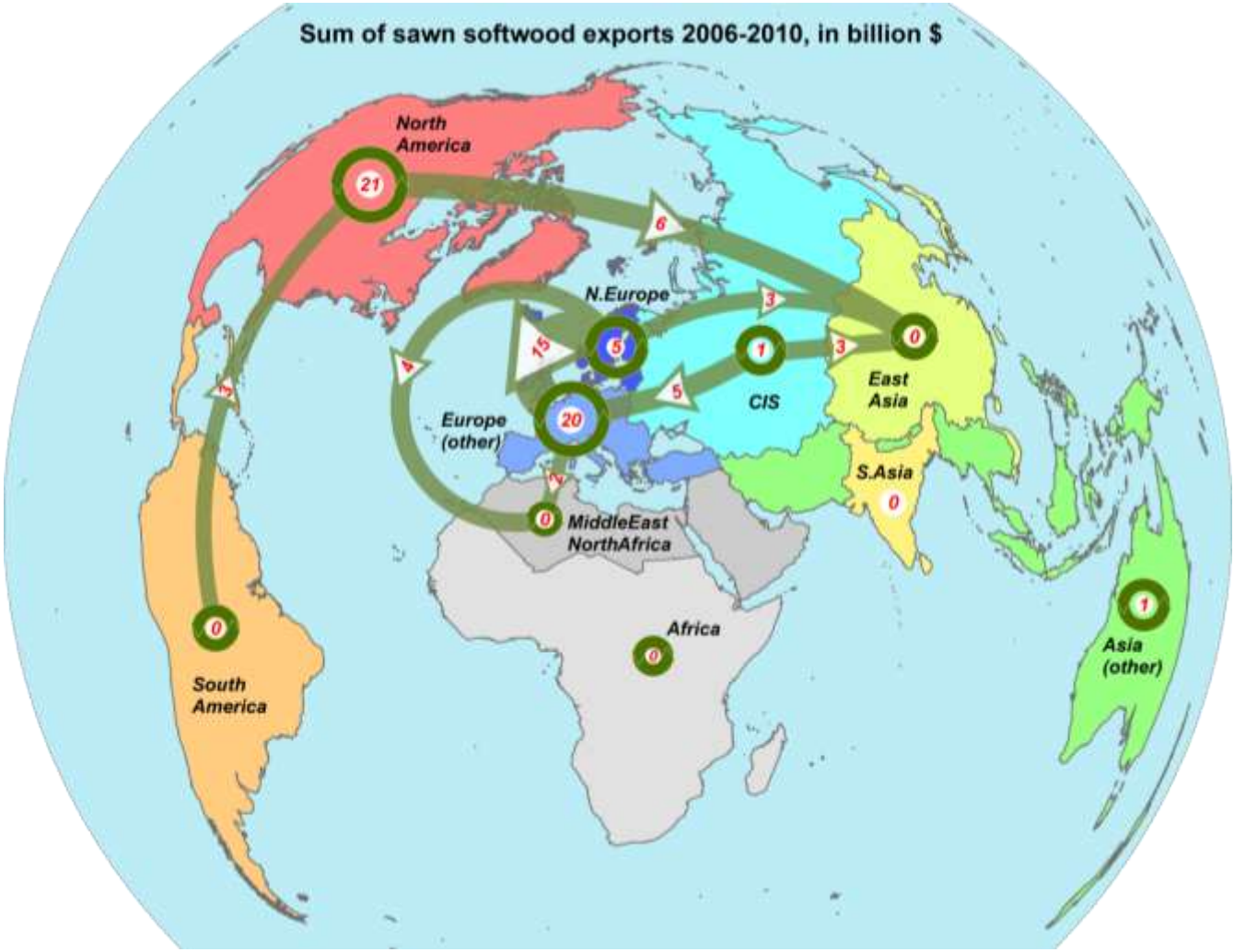


Source: FAO, 2012

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Sawn Softwood Trade Flow - Map



Source: UN COMTRADE and ECE, 2012

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Sawn Softwood Trade Flow

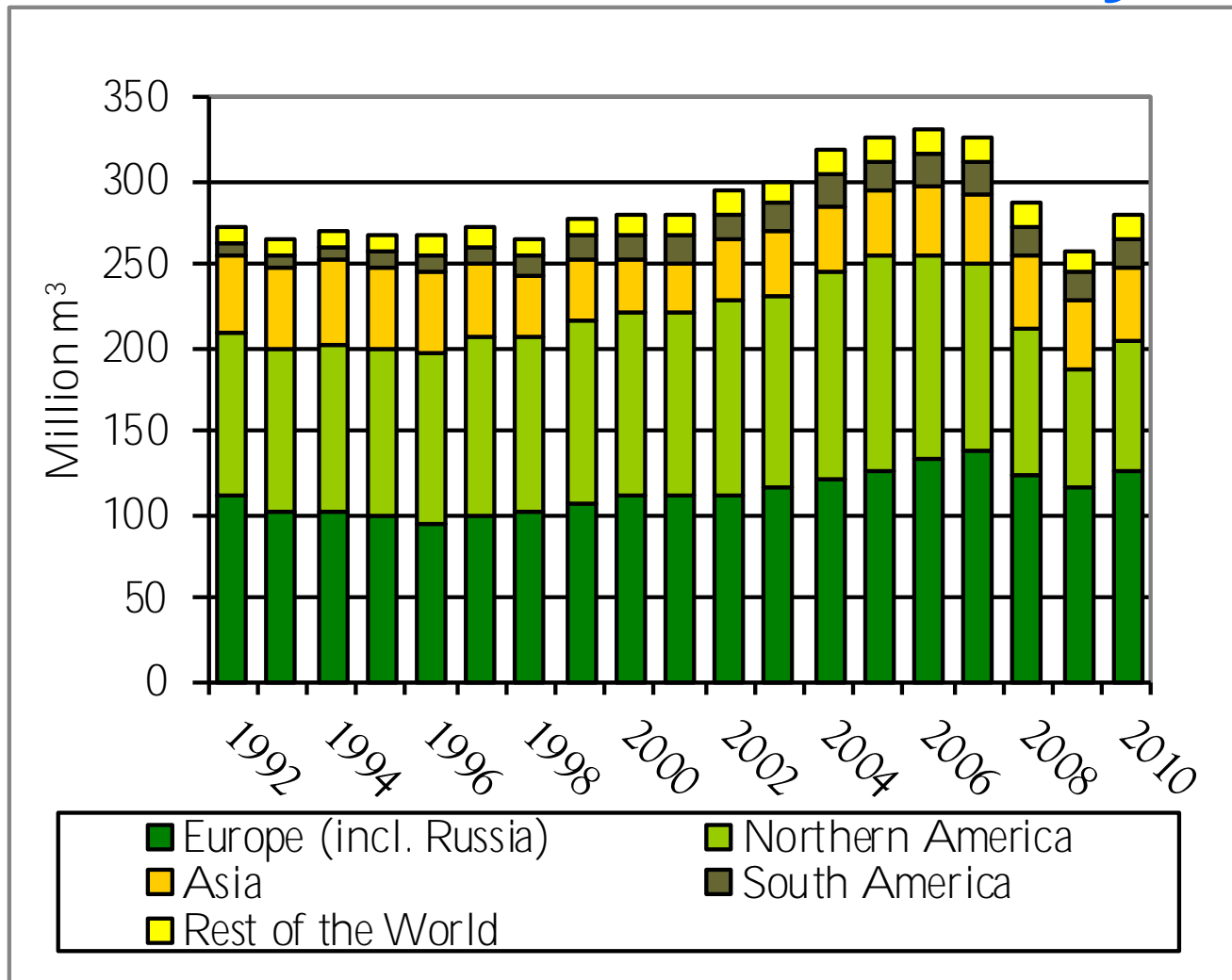
Sawn softwood											
Sum of Trade Values 2006-2010 (million USD)											
Importer	Exporter										Grand Total
	Africa	Asia (other)	CIS	East Asia	Europe (other)	MENA	N. Europe	North America	S. Asia	South America	
Africa	136	29	0	1	48	0	2	2	0	25	245
Asia (other)	20	1 074	83	68	214	1	114	781	0	153	2 508
CIS	0	0	834	2	14	0	7	1	-	0	859
East Asia	2	1 000	3 398	454	1 340	0	2 838	6 396	0	919	16 347
Europe (other)	30	74	4 802	18	20 029	2	15 253	1 353	0	434	41 996
MENA	31	174	961	31	2 107	50	3 613	146	12	518	7 642
N. Europe	0	1	1 425	2	339	0	4 856	31	-	7	6 662
North America	3	752	63	153	1 276	0	517	21 448	1	2 562	26 773
S. Asia	7	15	0	1	9	0	1	7	0	5	45
South America	0	1	0	1	4	0	0	465	0	420	890
Grand Total	228	3 120	11 566	731	25 381	53	27 202	30 629	13	5 044	103 966

Source: UN COMTRADE and ECE, 2012

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Sawn Softwood Production by Region

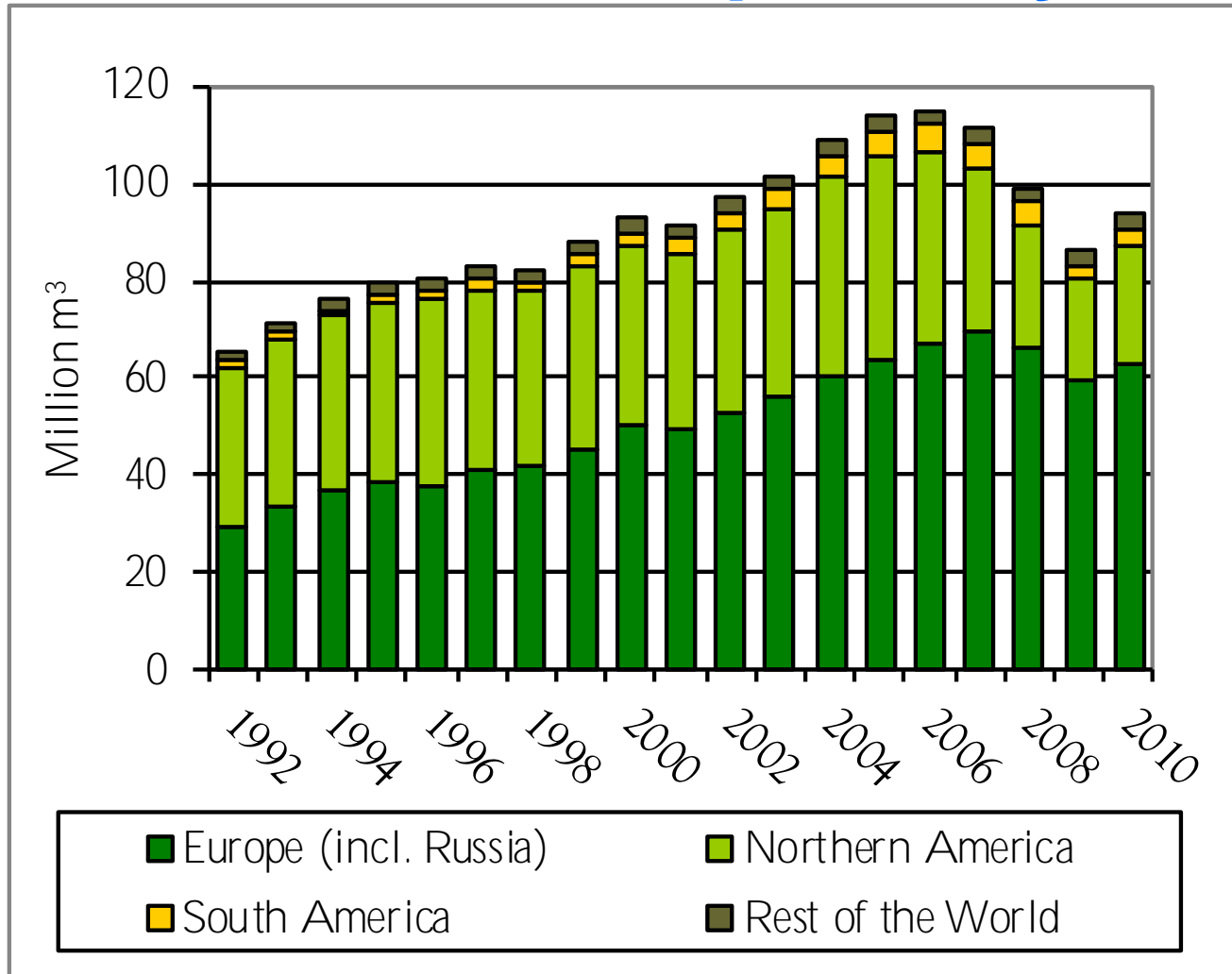


Source: FAO, 2012

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Sawn Softwood Exports by Region

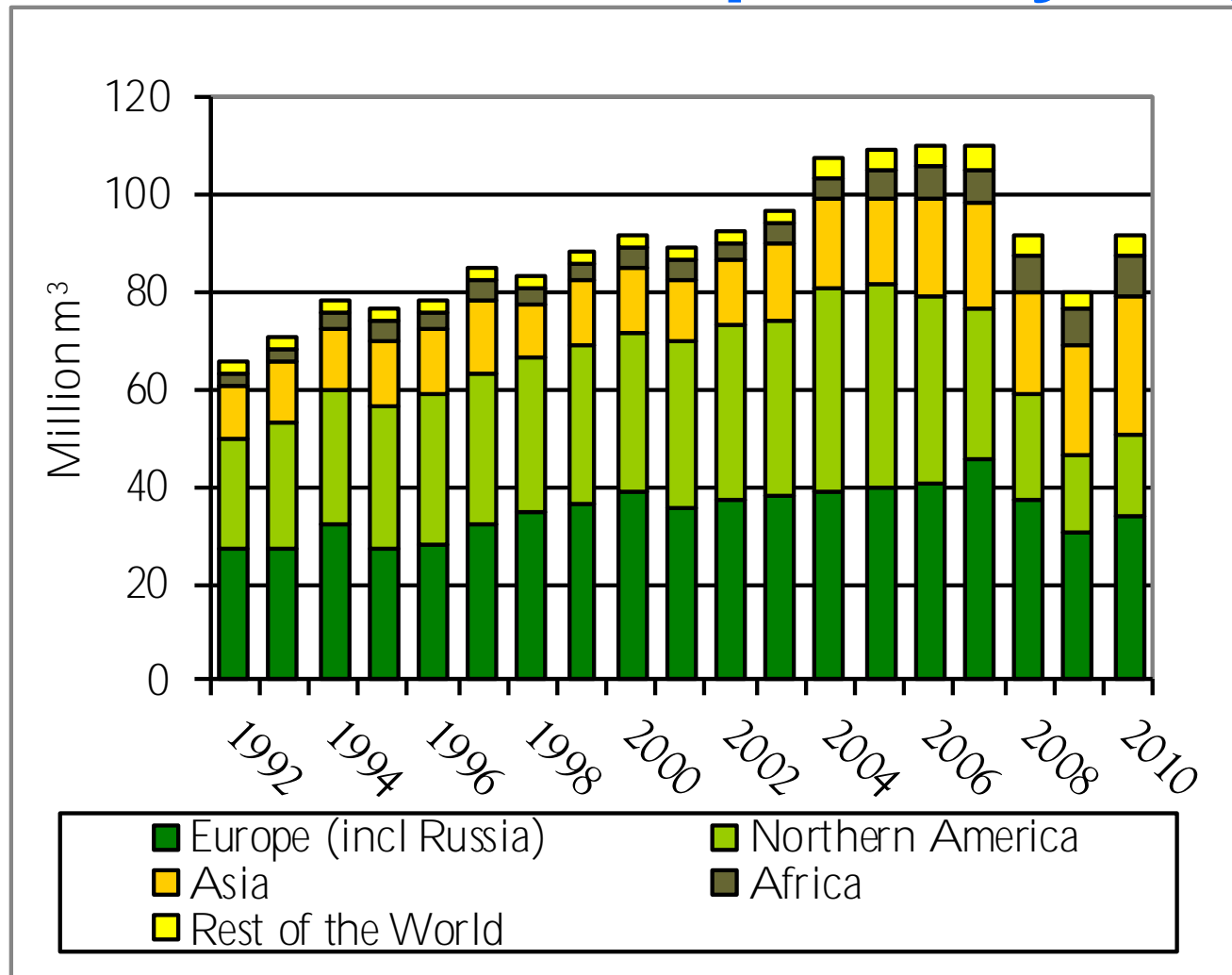


Source: FAO, 2012

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Sawn Softwood Imports by Region

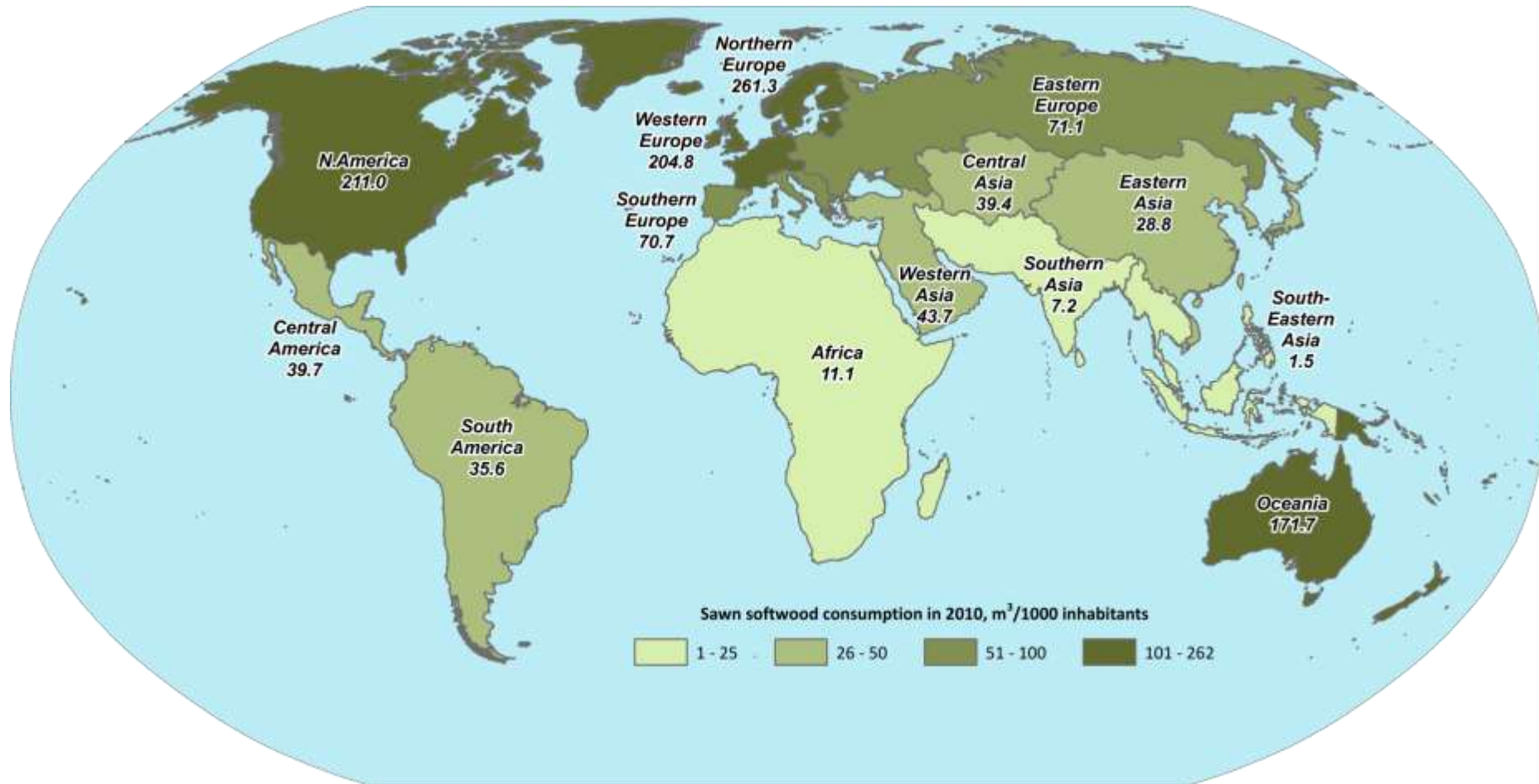


Source: FAO, 2012

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Sawn Softwood Consumption by Region, 2010

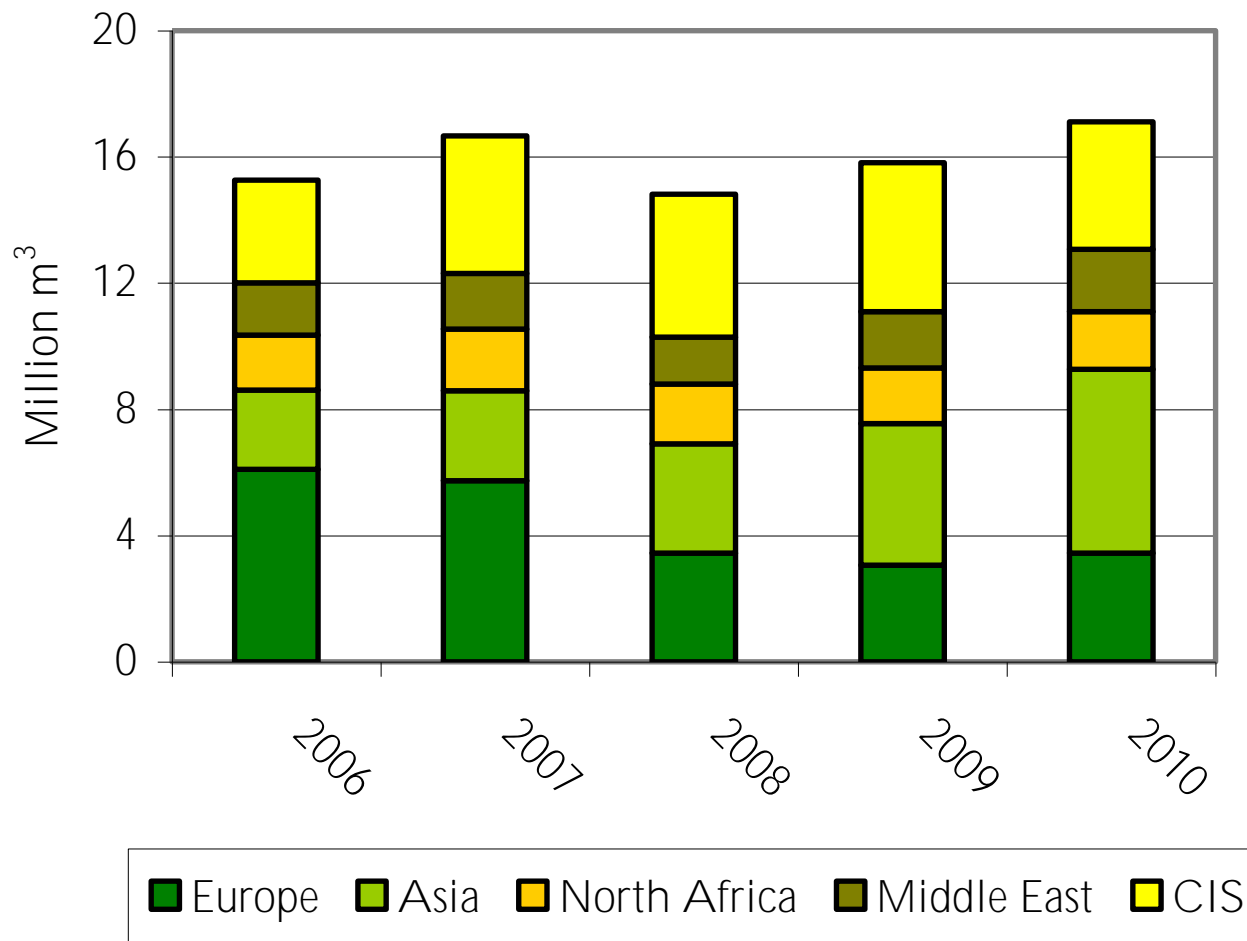


Source: FAO, 2012

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Russian Federation: Exports by Region

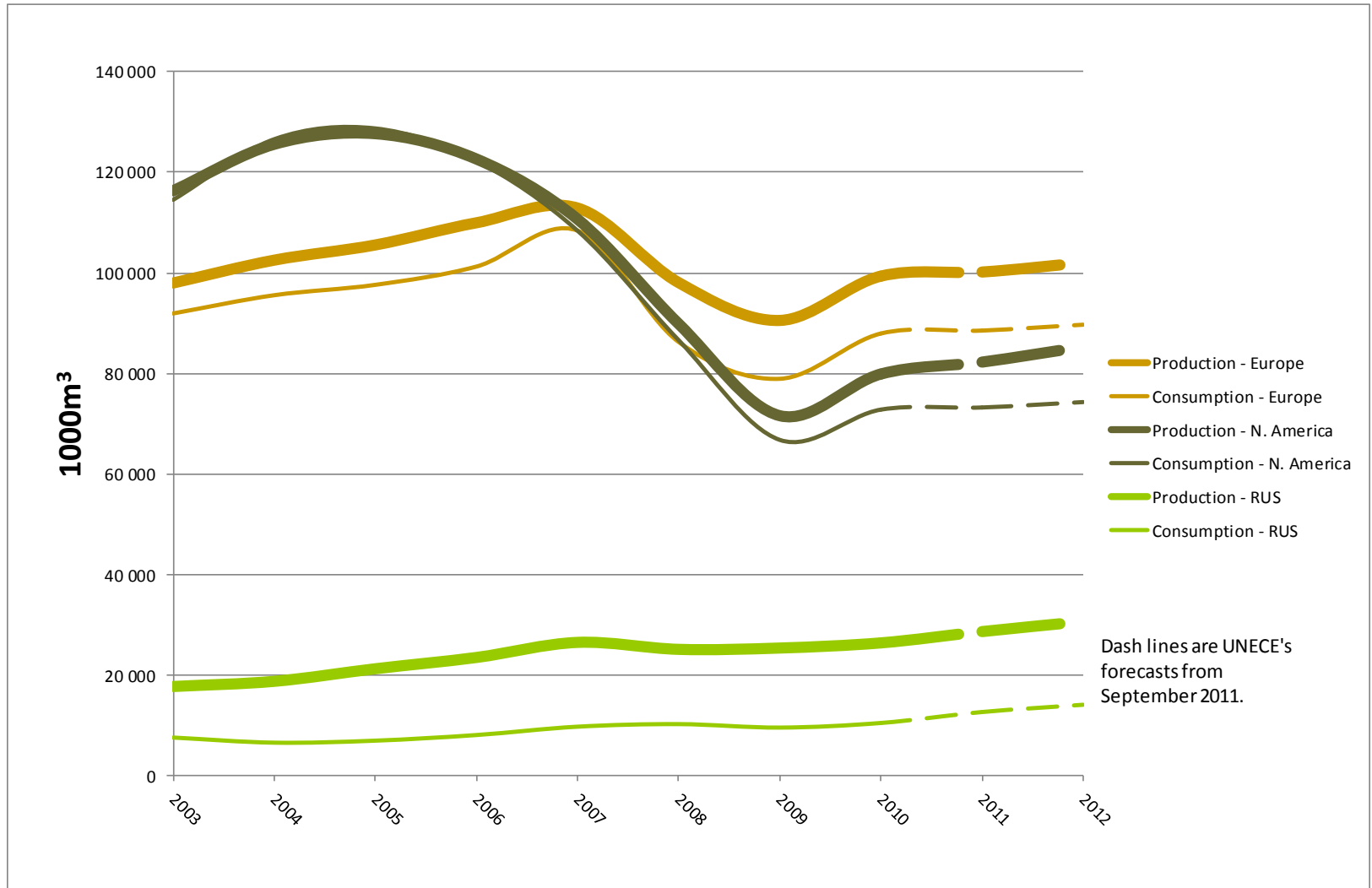


Source: Poyry, 2011

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Sawn Softwood Production and Consumption Forecast

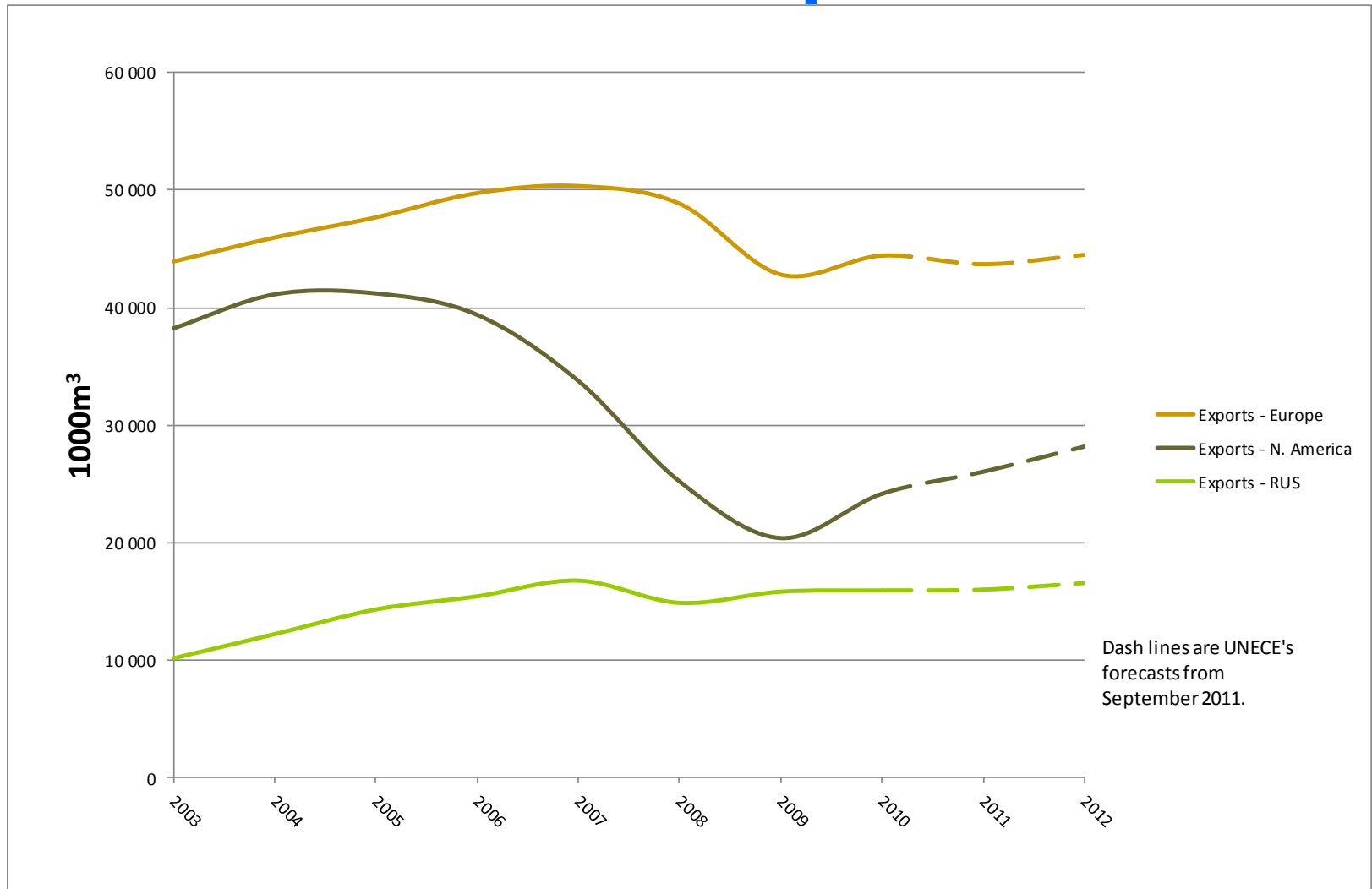


Source: UNECE Timber Committee, 2011

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Sawn Softwood Export Forecast

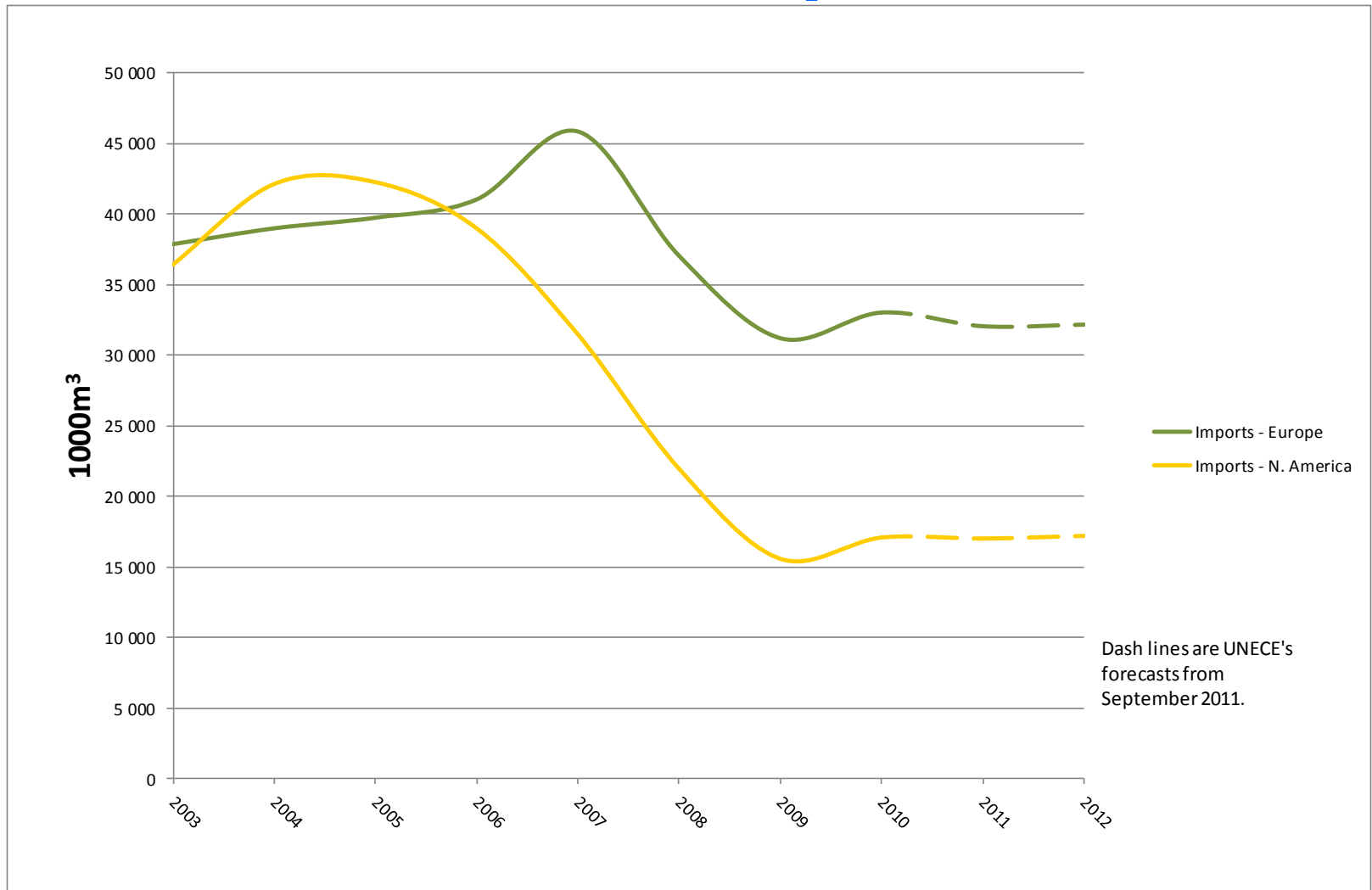


Source: UNECE Timber Committee, 2011

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Sawn Softwood Import Forecast

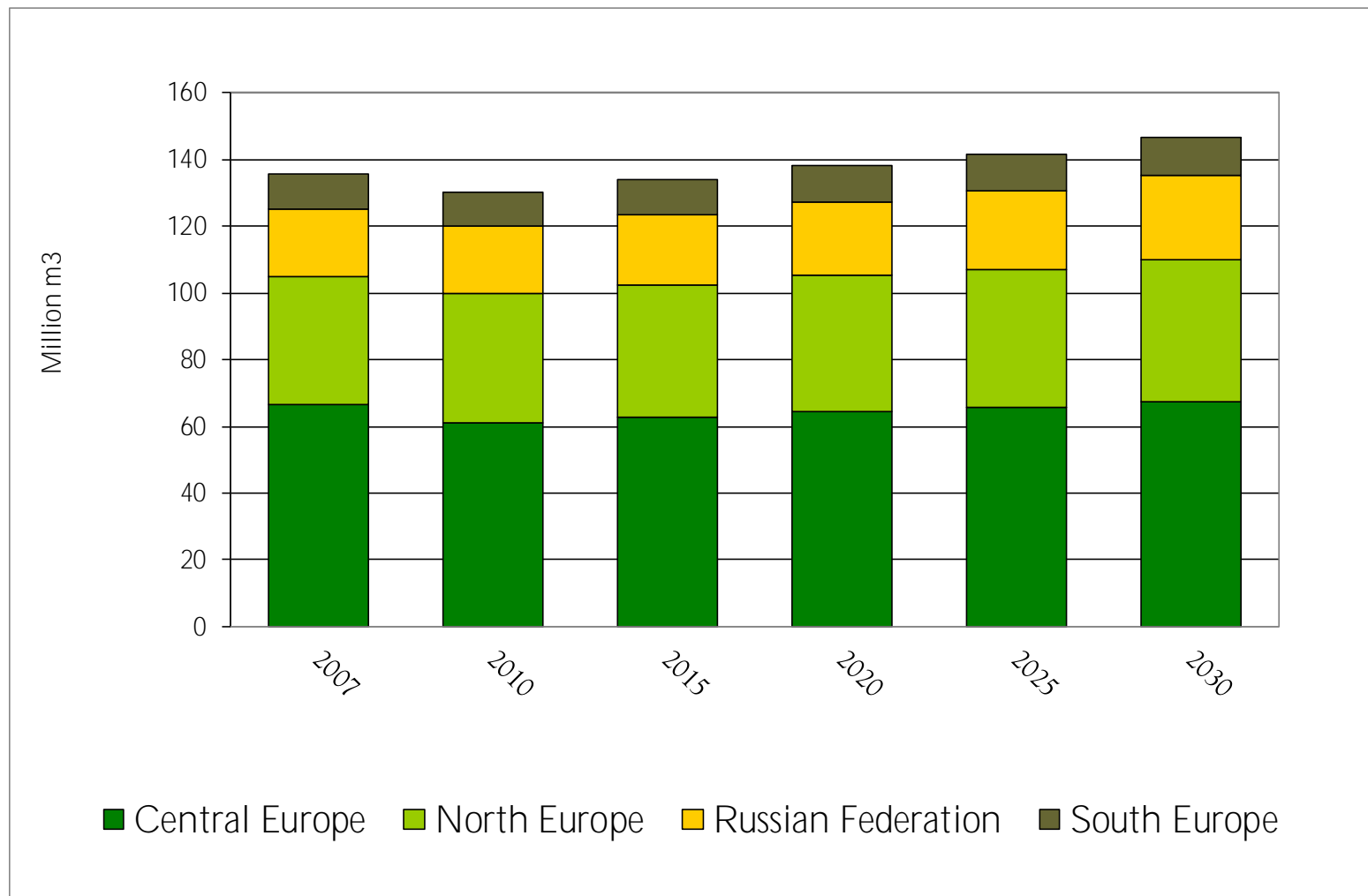


Source: UNECE Timber Committee, 2011

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Europe: Production Forecast

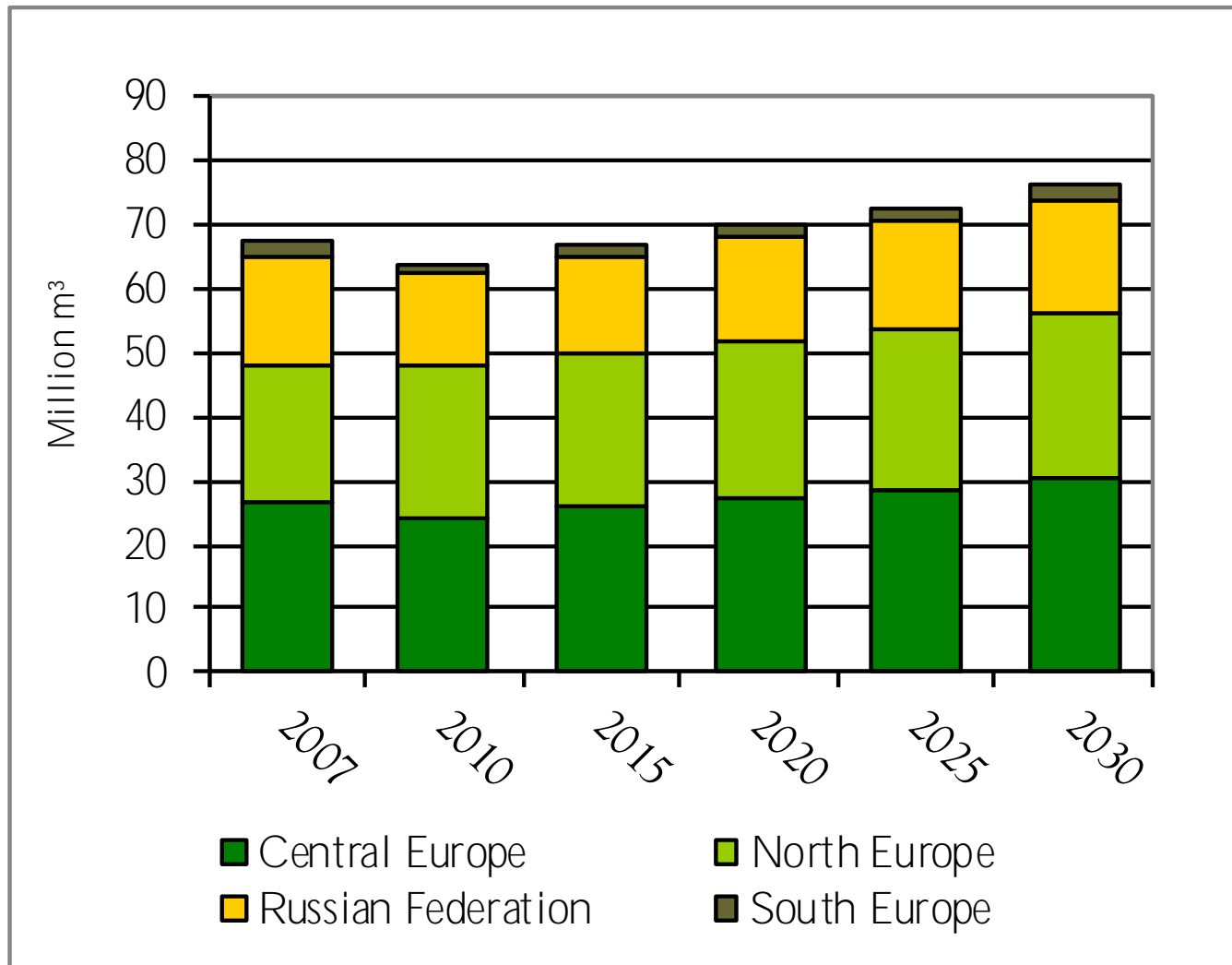


Source: UNECE European Forest Sector Outlook Study, 2011

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Europe: Export Forecast

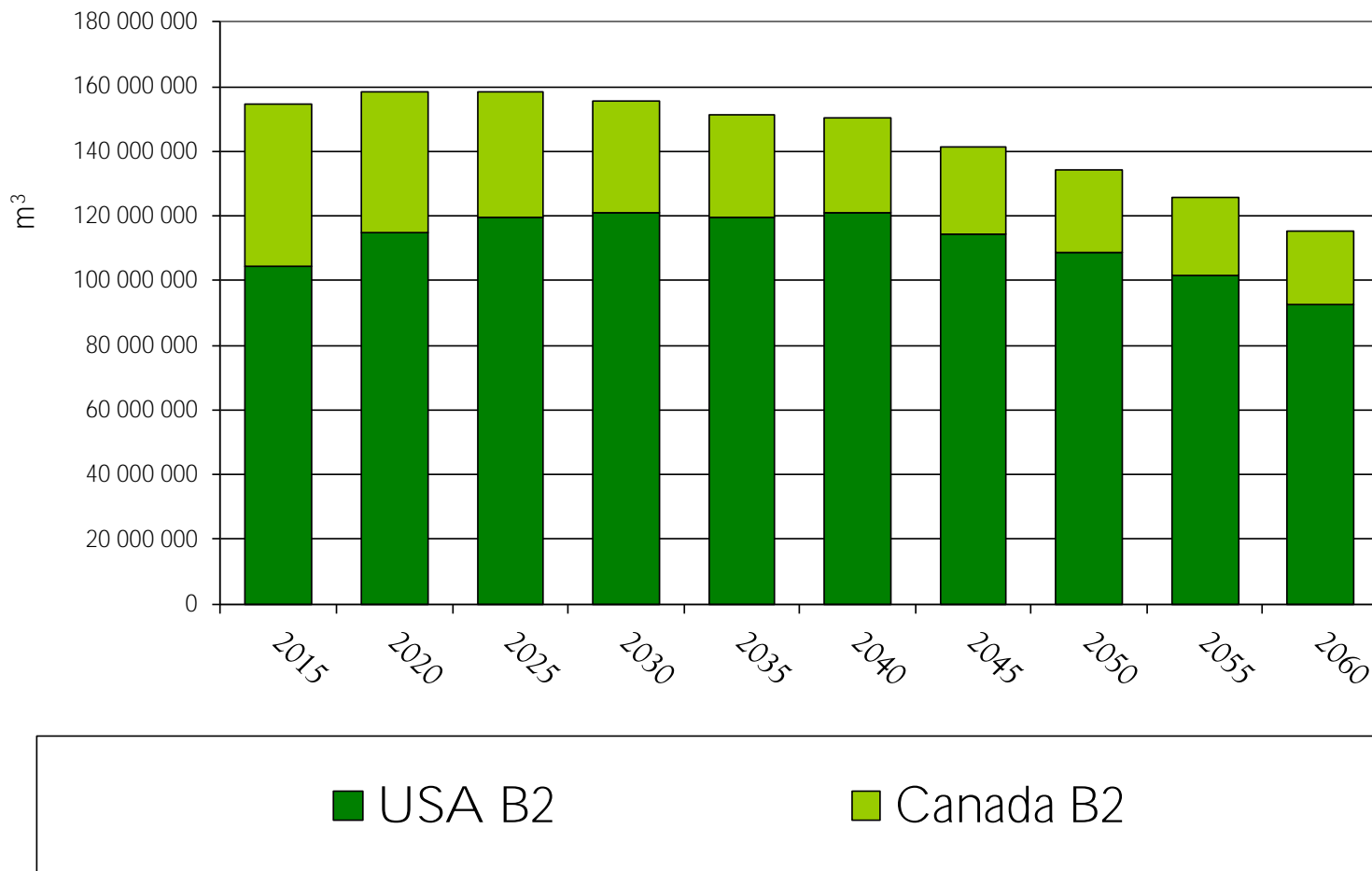


Source: UNECE European Forest Sector Outlook Study, 2011

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North America Sawnwood Production Forecast

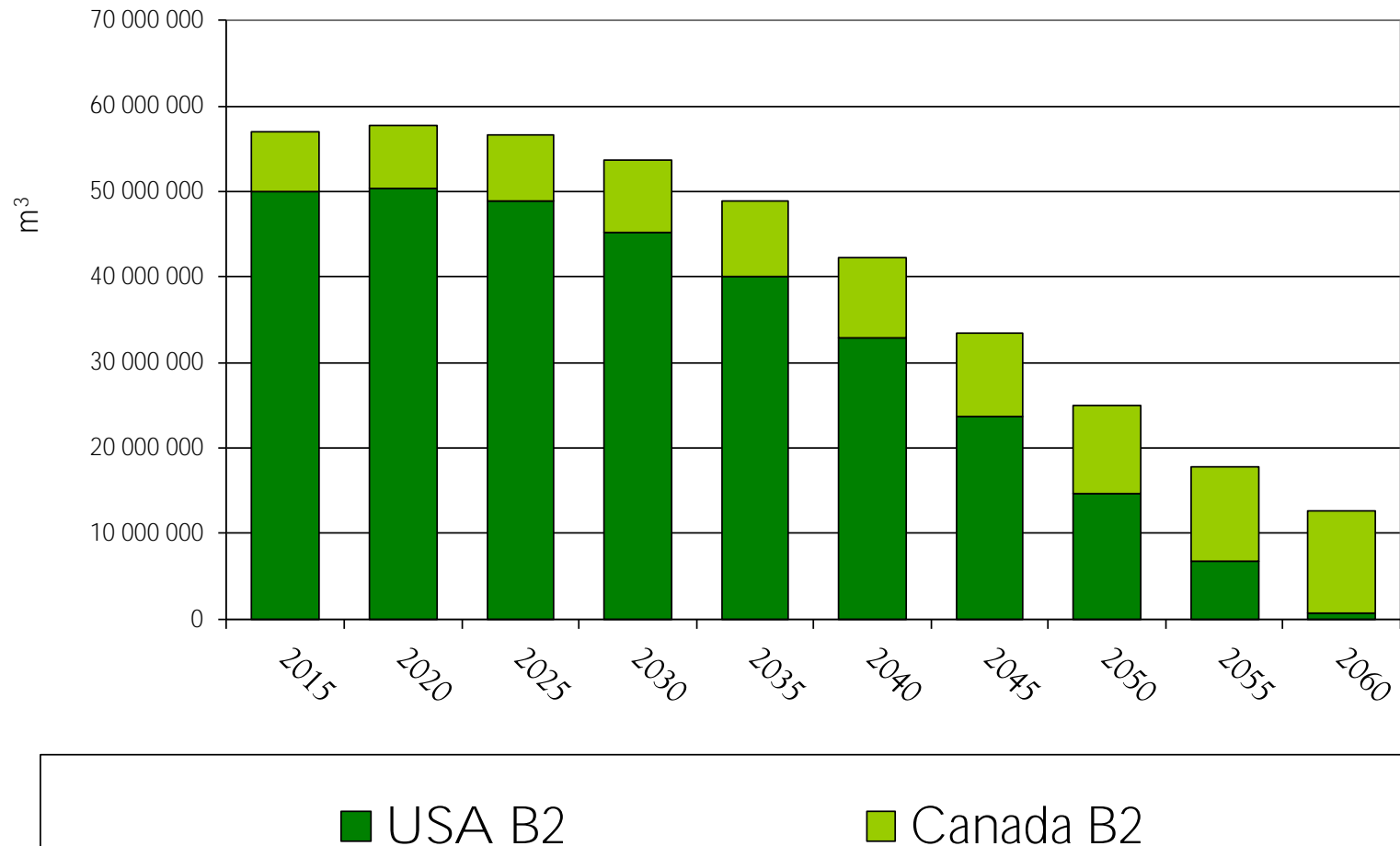


Source: North American Forest Sector Outlook Study, 2011

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North America Sawnwood Export Forecast

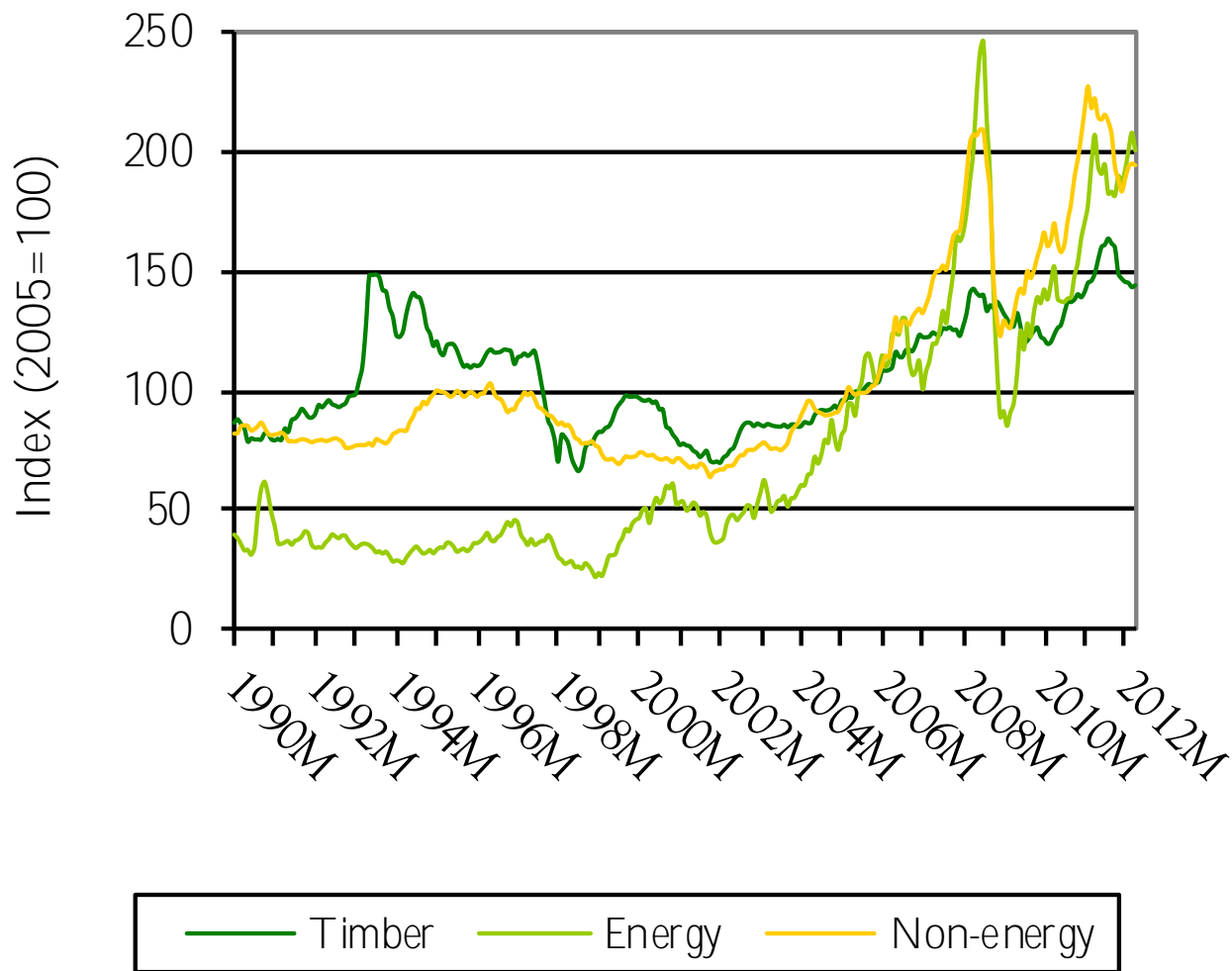


Source: North American Forest Sector Outlook Study, 2011

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Timber Price Comparison

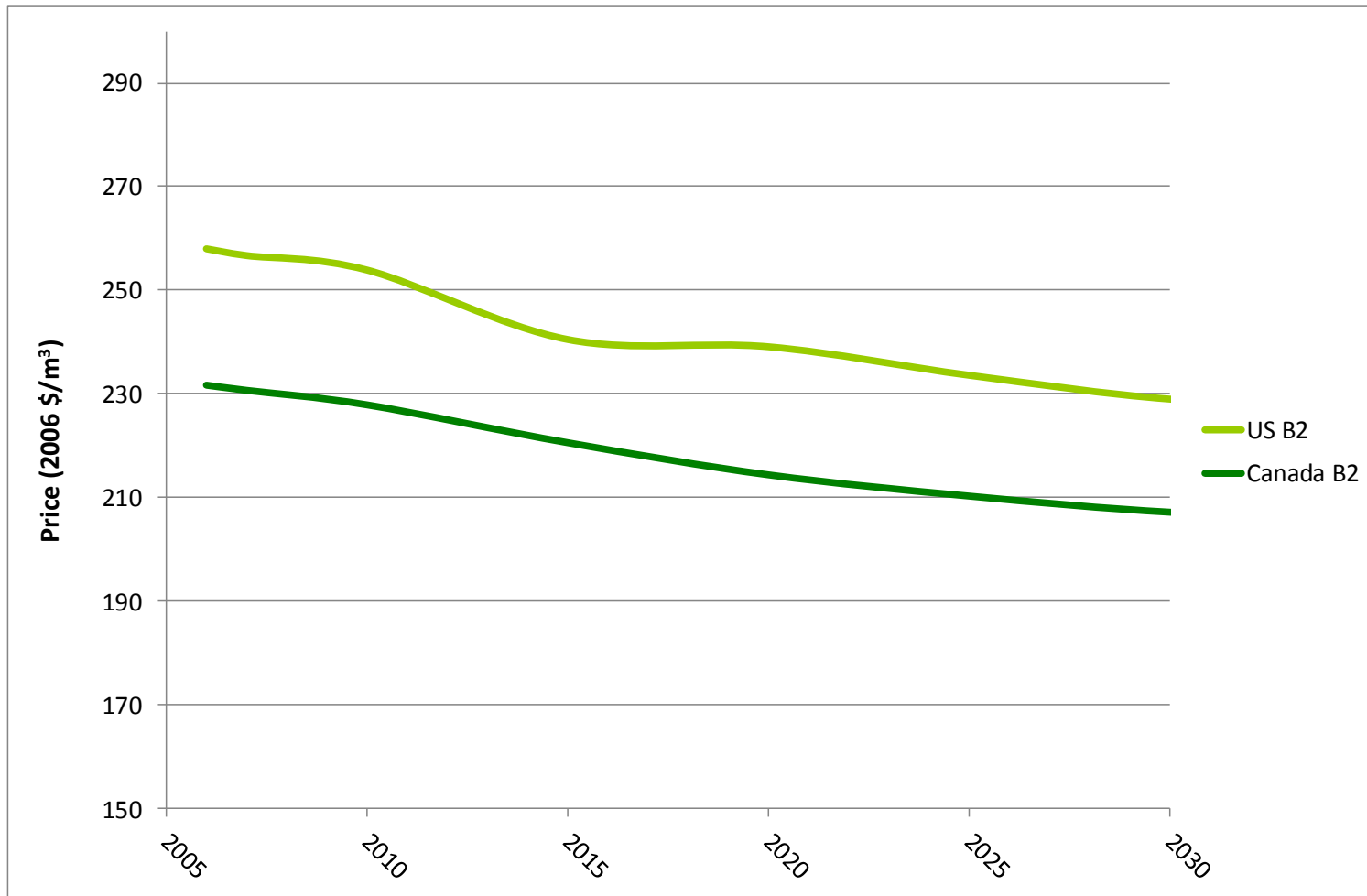


Source: World Bank, GEMS, 2012.

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Sawnwood: Price Outlook



Source: North American Forest Sector Outlook Study, 2012.

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Questions



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- Marcin Mionskowski, map designer



UNECE/FAO Data

<http://www.unece.org/forests/fpm/onlinedata.html>

Forest Products – production, imports and exports (in volume and value) for 66 products for UNECE region since 1964 and forecasts of production and trade in selected products (current and future year)

Forest Resources – information on forest cover, density, health, carbon storage, biological diversity, protective functions

Forest Outlook – extensive data to support Outlook main report, with production and trade models

Wood Energy – sources and uses of wood energy, has results of 3 rounds of enquiry (2005, 2007, 2009) for a limited number of countries



UNECE/FAO Publications

www.unece.org/forests

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Thank You



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