Alex McCusker, Matthew Fonseca, and Delton Alderman

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
Sawn Softwood Production: 1992-2010

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Exports: 1992-2010

Source: FAO, 2012
Sawn Softwood Imports: 1992-2010

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Trade Flow - Map

Source: UN COMTRADE and ECE, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
## Sawn Softwood Trade Flow

**Sum of Trade Values 2006-2010 (million USD)**

<table>
<thead>
<tr>
<th>Importer</th>
<th>Africa</th>
<th>Asia (other)</th>
<th>CIS</th>
<th>East Asia (other)</th>
<th>Europe (other)</th>
<th>MENA</th>
<th>N. Europe</th>
<th>North America</th>
<th>S. Asia</th>
<th>South America</th>
<th>Grand Total</th>
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<tbody>
<tr>
<td>Africa</td>
<td>136</td>
<td>29</td>
<td>0</td>
<td>1</td>
<td>48</td>
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<td>2</td>
<td>2</td>
<td>0</td>
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<tr>
<td>Asia (other)</td>
<td>20</td>
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<td>83</td>
<td>68</td>
<td>214</td>
<td>1</td>
<td>114</td>
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<td>2 508</td>
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<tr>
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<td>0</td>
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<td>2</td>
<td>14</td>
<td>0</td>
<td>7</td>
<td>1</td>
<td>-</td>
<td>0</td>
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<tr>
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<td>2</td>
<td>1 000</td>
<td>3 398</td>
<td>454</td>
<td>1 340</td>
<td>0</td>
<td>2 838</td>
<td>6 396</td>
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<tr>
<td>Europe (other)</td>
<td>30</td>
<td>74</td>
<td>4 802</td>
<td>18</td>
<td>20 029</td>
<td>2</td>
<td>15 253</td>
<td>1 353</td>
<td>0</td>
<td>434</td>
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<tr>
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<td>961</td>
<td>31</td>
<td>2 107</td>
<td>50</td>
<td>3 613</td>
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<tr>
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<td>2</td>
<td>339</td>
<td>0</td>
<td>4 856</td>
<td>31</td>
<td>-</td>
<td>7</td>
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<td>North America</td>
<td>3</td>
<td>752</td>
<td>63</td>
<td>153</td>
<td>1 276</td>
<td>0</td>
<td>517</td>
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<td>1</td>
<td>2 562</td>
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<td>1</td>
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<td>1</td>
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<td>11 566</td>
<td>731</td>
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<td>53</td>
<td>27 202</td>
<td>30 629</td>
<td>13</td>
<td>5 044</td>
<td>103 966</td>
</tr>
</tbody>
</table>

Source: UN COMTRADE and ECE, 2012
Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Production by Region

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Exports by Region

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Imports by Region

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Consumption by Region, 2010

Source: FAO, 2012

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Russian Federation: Exports by Region

Source: Poyry, 2011

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Production and Consumption Forecast

Source: UNECE Timber Committee, 2011

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawn Softwood Export Forecast

Source: UNECE Timber Committee, 2011

Dash lines are UNECE's forecasts from September 2011.
Sawn Softwood Import Forecast

Source: UNECE Timber Committee, 2011

Dash lines are UNECE's forecasts from September 2011.
Europe: Production Forecast

Source: UNECE European Forest Sector Outlook Study, 2011
Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Europe: Export Forecast

Source: UNECE European Forest Sector Outlook Study, 2011

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
North America Sawnwood Production Forecast

Source: North American Forest Sector Outlook Study, 2011
Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
North America Sawnwood Export Forecast

Source: North American Forest Sector Outlook Study, 2011
Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Timber Price Comparison


Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Sawnwood: Price Outlook

Forest Products Society, June 2012 - Historical Trends of Sawn Softwood Markets
Questions
Thanks to

• Matt Fonseca and Alex McCusker, staff at UNECE-FAO
• Juuso Pihamaa and Johannes Aarila, interns at UNECE-FAO
• Marcin Mionskowski, map designer
UNECE/FAO Data

http://www.unesco.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
Thank You