Laubholzmarkt
Blick über die Landesgrenzen

Schweizerischer Forsverein - Debatte
Laubholz: Angebot ohne Nachfrage
11 Mai 2017, Zollikofen
Outline

- UNECE
- Resources
- Production
- Trade
- Prices
- Market
- Outlook
Economic Commission for Europe

- ... is a multilateral platform which facilitates greater economic integration and cooperation among its fifty-six member States

- ... promotes sustainable development and economic prosperity through:
  - policy dialogue,
  - negotiation of international legal instruments,
  - development of regulations and norms,
  - exchange and application of best practices as well as economic and technical expertise,
  - technical cooperation for countries with economies in transition.
  - data and statistics
The UNECE Region

40 % of the world’s forest area but
60 % of the world’s industrial roundwood production
Forestry and Timber Section

- **WA1**: data, monitoring and assessment
- **WA2**: policy dialogue and advice
- **WA3**: communication and outreach
- **WA4**: capacity building
Forest composition

Source: http://w3.unece.org/PXWeb2015/pxweb/en/STAT/STAT__26-TMSTAT1
## Hardwood production & export

<table>
<thead>
<tr>
<th>Country</th>
<th>Industrial roundwood, non-coniferous</th>
<th>Sawnwood, non-coniferous all</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Production [1,000 m³]</td>
<td>Global rank</td>
</tr>
<tr>
<td>France</td>
<td>8,629</td>
<td>15</td>
</tr>
<tr>
<td>Germany</td>
<td>8,379</td>
<td>17</td>
</tr>
<tr>
<td>Romania</td>
<td>5,631</td>
<td>25</td>
</tr>
<tr>
<td>Croatia</td>
<td>2,634</td>
<td>39</td>
</tr>
<tr>
<td>Austria</td>
<td>999</td>
<td>68</td>
</tr>
<tr>
<td>Italy</td>
<td>756</td>
<td>78</td>
</tr>
<tr>
<td>Switzerland</td>
<td>410</td>
<td>95</td>
</tr>
</tbody>
</table>

Source: UNECE/FAO
Romania – sawn hardwood export

Source: UNECE/FAO
Germany – sawn hardwood export

Source: UNECE/FAO
Croatia – sawn hardwood export

Million m³

Source: UNECE/FAO
France – sawn hardwood export

Source: UNECE/FAO
Holzpreisentwicklung Schweiz 2001 - 2014

Säge-Rundholz: Laubholz 2) Buche 4 B, 40-49, B, min. 3 m Fr. / Fm
Säge-Rundholz: Laubholz 2) Buche 4 C, 40-49, C, min. 3 m Fr. / Fm
Industrieholz Laubholz, I. Klasse, kranlang Fr. / Fm
Energieholz Spälten (Buche) Fr. / Rm
Holzschnitzel (Laubholz) 8) Schweiz Fr. / Rm
Wood price development Austria & Slovenia

Source: UNECE/FAO
Forest Products Annual Market Review
Sawn hardwood production in the UNECE region increased by 1.8% in 2015, to 40.7 million m³, with increases in all three subregions.

Falling consumption in Europe and the CIS in 2015 was offset by rising consumption in North America. European consumption of sawn hardwood decreased by 2.8%, to 12.2 million m³, due mainly to a significant decline in Turkish consumption.

Multilayer parquet floors now account for about 84% of the European wood-flooring market by volume, while solid hardwood accounts for only 14%. There is a strong fashion trend for floorboards with grooves, knot holes and other irregularities.

China continued to dominate the sawn hardwood trade. China’s imports of tropical and temperate sawn hardwoods were valued at $4.1 billion in 2015.

Innovations in the hardwood sector – such as new hardwood cross-laminated timber, glulam and laminated veneer lumber products – aim to extend the use of hardwood into new (notably structural) applications.
Global furniture production was worth $410 billion in (furniture trade estimated $140 billion). Trade policies continue to influence the investment decisions of manufacturers.

EU furniture industry output was stagnant overall in 2015 – in large western European manufacturing countries it was 20-30% below levels seen before the global financial crisis.

Furniture companies are increasingly looking for ways to shorten delivery times to customers. Customization and designer furniture collections are aimed at increasing the competitiveness of production in the UNECE region.

More than 50% of consumers in the US use mobile devices to access furniture stores online (+5% from 2010); traditional furniture stores are under pressure and adapt their business models to new ways of shopping.
EU exports of wood furniture to countries outside the EU (ITTO IMM analysis of Eurostat COMEXT)
Main policy issues and challenges for the forest sector

- Mitigating climate change
- Promoting renewable energy
- Adapting to climate change and protecting forests
- Protecting and enhancing biodiversity
- Supplying renewable and competitive forest products to Europe and the world
- Achieving and demonstrating sustainability
- Developing appropriate policies and institutions
Thank you!

Florian STEIERER
UNECE/FAO Forestry and Timber Section
11 May 2017, Bern
Extent of broadleaved forest in AT/CH/DE/FR/HR/IT/RO

- Forest composition France
- Forest composition Germany
- Forest composition Austria
- Forest composition Switzerland
- Forest composition Romania
- Forest composition Croatia
- Forest composition Italy

Legend:
- Mixed forest
- Predominantly broadleaved forest
- Predominantly coniferous forest
## Sawn hardwood trade

### FORESTS

<table>
<thead>
<tr>
<th>To:</th>
<th>From:</th>
<th>Europe</th>
<th>CIS</th>
<th>North America</th>
<th>Non-UNECE</th>
<th>Grand total</th>
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<td>DEU</td>
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<td>HRV</td>
<td>FRA</td>
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<tr>
<td>United Kingdom</td>
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<td>0.2</td>
<td>0.3</td>
<td>0.4</td>
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<tr>
<td>Poland</td>
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<tr>
<td>Total</td>
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<td>1.9</td>
<td>0.6</td>
<td>1.5</td>
<td>1.3</td>
<td>0.7</td>
</tr>
</tbody>
</table>

**Sawn hardwood trade**

- **Europe**: United Kingdom, Italy, Belgium, Netherlands, Germany, France, Israel, Austria, Poland
- **CIS**: Russia, Ukraine
- **North America**: United States, Canada
- **Non-UNECE**: Malaysia, Thailand, Lao, Cameroon, Indonesia, Gabon, Brazil, Vietnam
- Grand total for each region is calculated by summing the quantities exported from each country to the total quantity imported by the region.