

UNECE Timber Committee Market Discussions

Theme:

“Forest certification policies’ influence on forest products markets in the UNECE region”

27-28 September 2005, Geneva



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Market Discussions, 27 – 28 September 2005



Today's topics

- Policy implications of forest products market developments
- Kyoto Protocol's influence on forest products markets and policy
- Certification's role in corporate responsibility in the forest products sector



Tomorrow's topics

- Certified forest products markets
- Economic background and housing markets
- Market effects of 2005 windstorms
- Wood raw materials and wood energy



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Tomorrow's topics

- Sawn softwood markets
- Sawn hardwood markets
- Panel markets
- Pulp and paper markets
- Value-added wood products



2004 vs. 2005 market discussions

- 2004 combined with European Forestry Commission
- 2004 was 1 day
- 2005 is 1½ days
- More discussion time
- More emphasis on forecasts



Info sources

- Country forecasts for 2005 & 2006
- Country market statements
- UNECE/FAO *Forest Products Annual Market Review, 2004-2005*
- Expert presentations
- Delegates' interventions in discussions



Forest Products Annual Market Review, 2004-2005

- Produced in summer 2005
- On website in July
- Printed in September in English
- Russian version expected in 6 months
- French version expected in 10 months
- Executive summaries available



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Thanks to the UNECE/FAO Review Team !

- Mikko Kiiskinen & Outi Marin—Assistants
- Caroline Stein—Technical input
- Matt Fonseca—Layout
- Alex McCusker—Statistics
- Douglas Clark—Editor
- Sefora Kifle—Prices
- Cynthia de Castro—Administration



And thanks to the all other contributors !

- Kit Prins — Technical reviews
- Osamu Hashiramoto — Technical reviews
- Christina O'Shaughnessy — Editing
- Authors from UNECE/FAO Team of Specialists on Forest Products Markets and Marketing
- Authors presenting today
- Contributors listed
- Statistical correspondents listed
- 40 people contributed directly to the FPAMR
- Plus translators, printers, distributors, admin



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Country market statements

- Economic trends affecting the forest and forest industries sector
- National policy measures affecting forests and forest products markets
- Developments in forest products markets sectors (major emphasis)
- Market drivers
- Tables of forecasts and economic info



Outcomes of today's discussions

- TC Market Statement
- Market press release
- Information to joint TC and European Forestry Commission website
 - Forecasts
 - Presentations
- Theme for 2006 TC Market Discussions



Committee is invited to:

(from document TIM/2005/3)

- Discuss how government and industry policies on forest certification are affecting forest products markets
- Discuss forest products markets and policy developments and forecasts
- Draft a market statement
- Comment on *Forest Products Annual Market Review, 2004-2005*



Policy questions for TC Market Discussions and Policy Forum

- 11 questions circulated by e-mail last week
- Designed to stimulate discussion
- Results to be reflected in
 - TC Market Statement
 - Policy Forum report
 - Their press releases

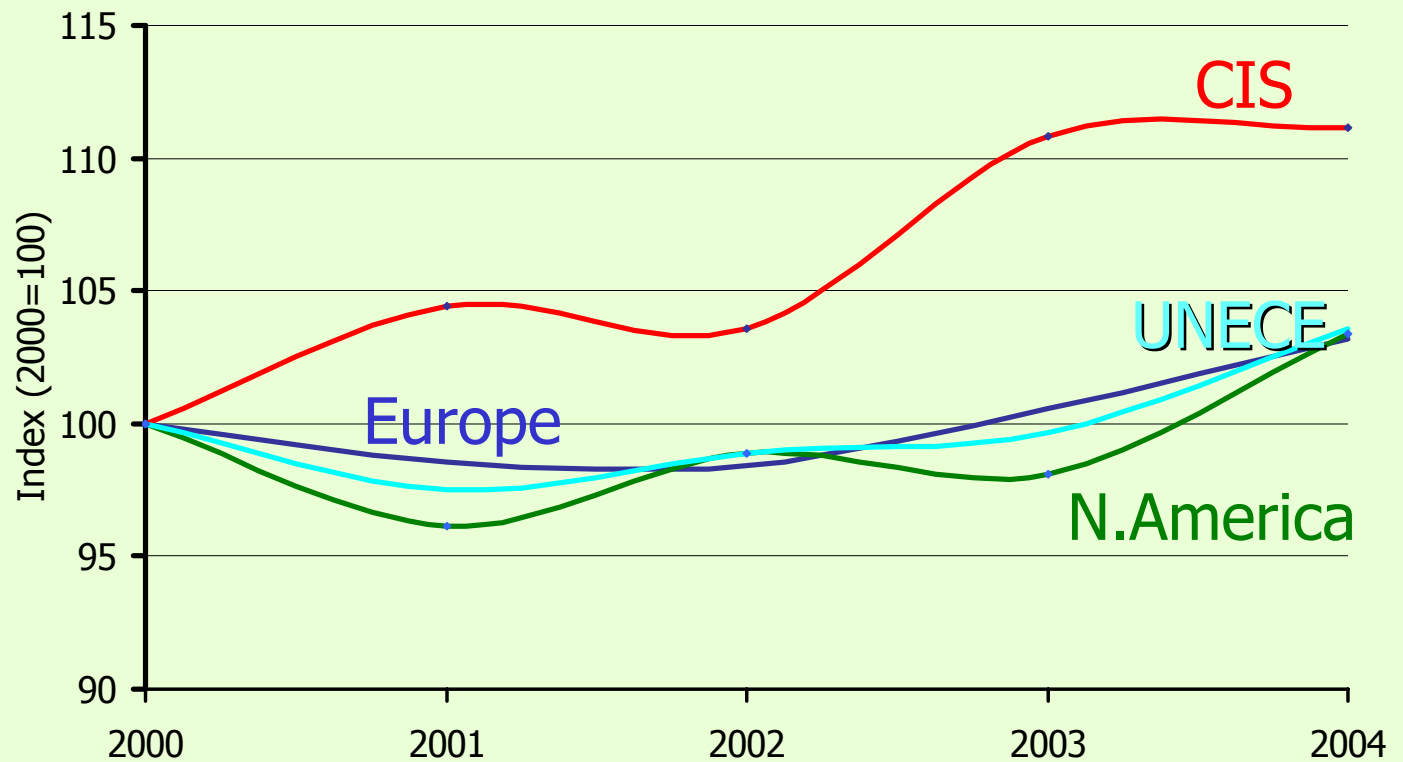


Where in the world are the UNECE timber markets?

- Consumption in region
- Exports from region
- Region's share of production
- Region's trade balance
- Abstracted from the *Forest Products Annual Market Review, 2004-2005*



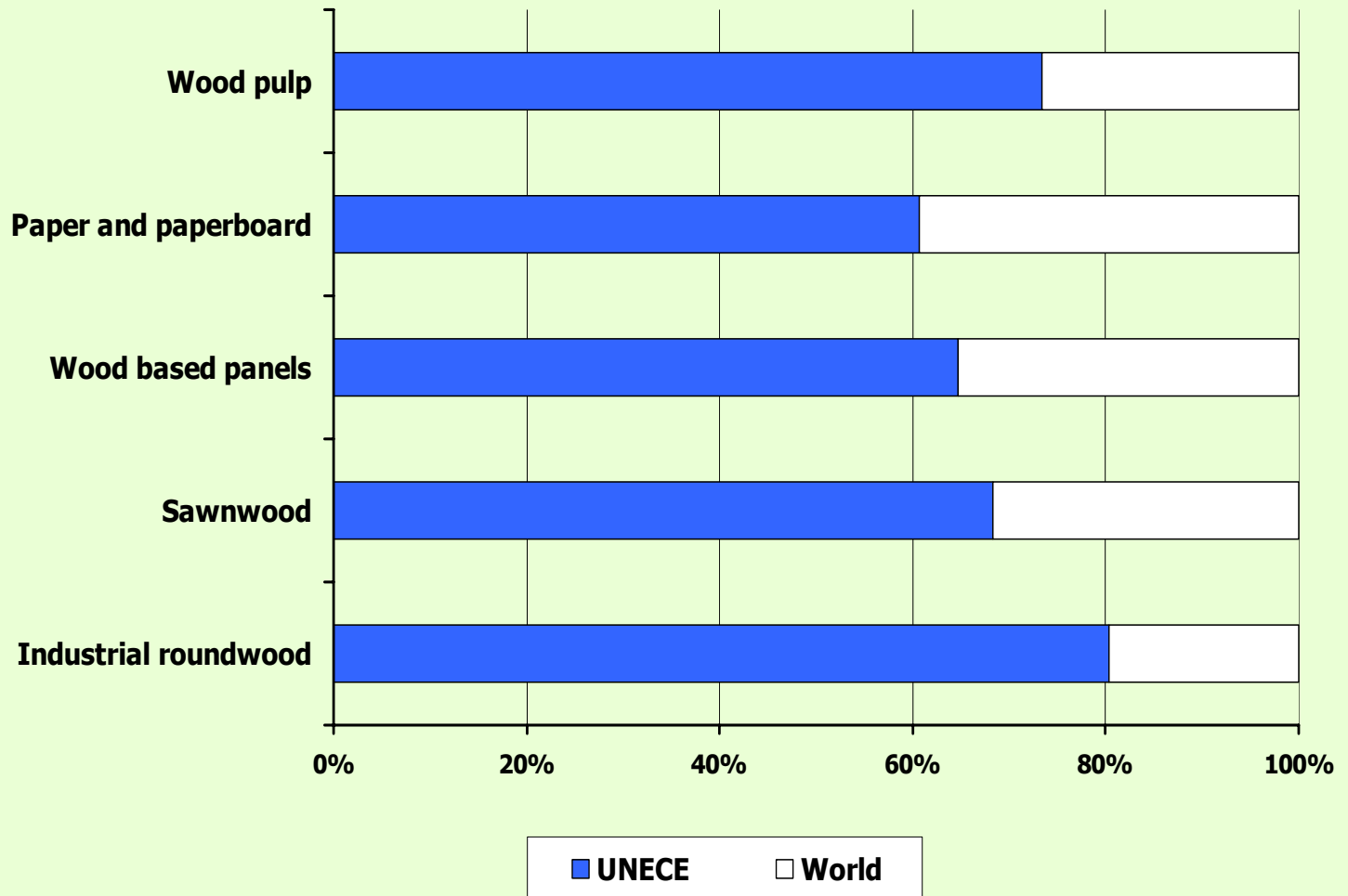
Consumption of primary products



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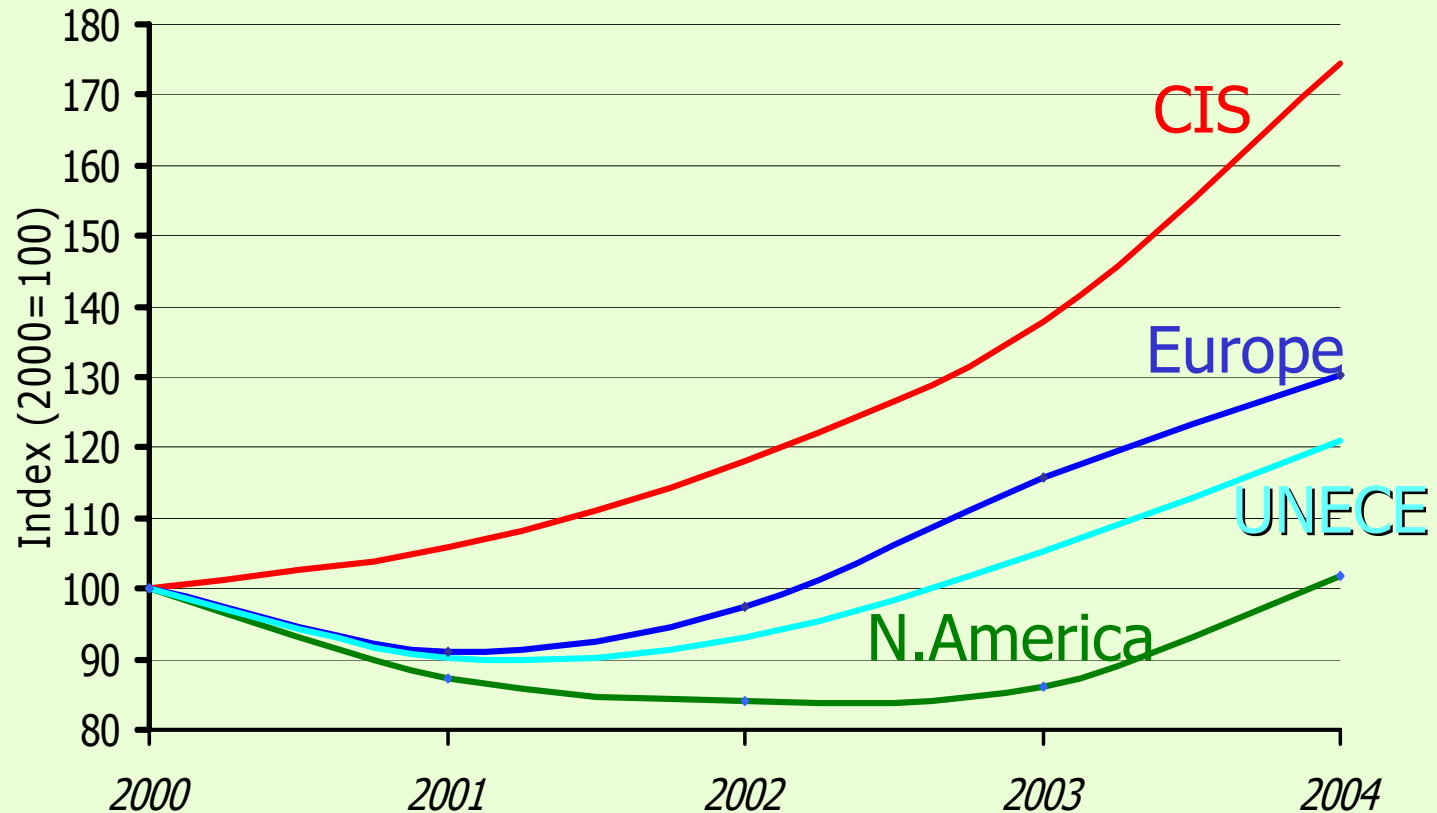
UNECE region's share of consumption



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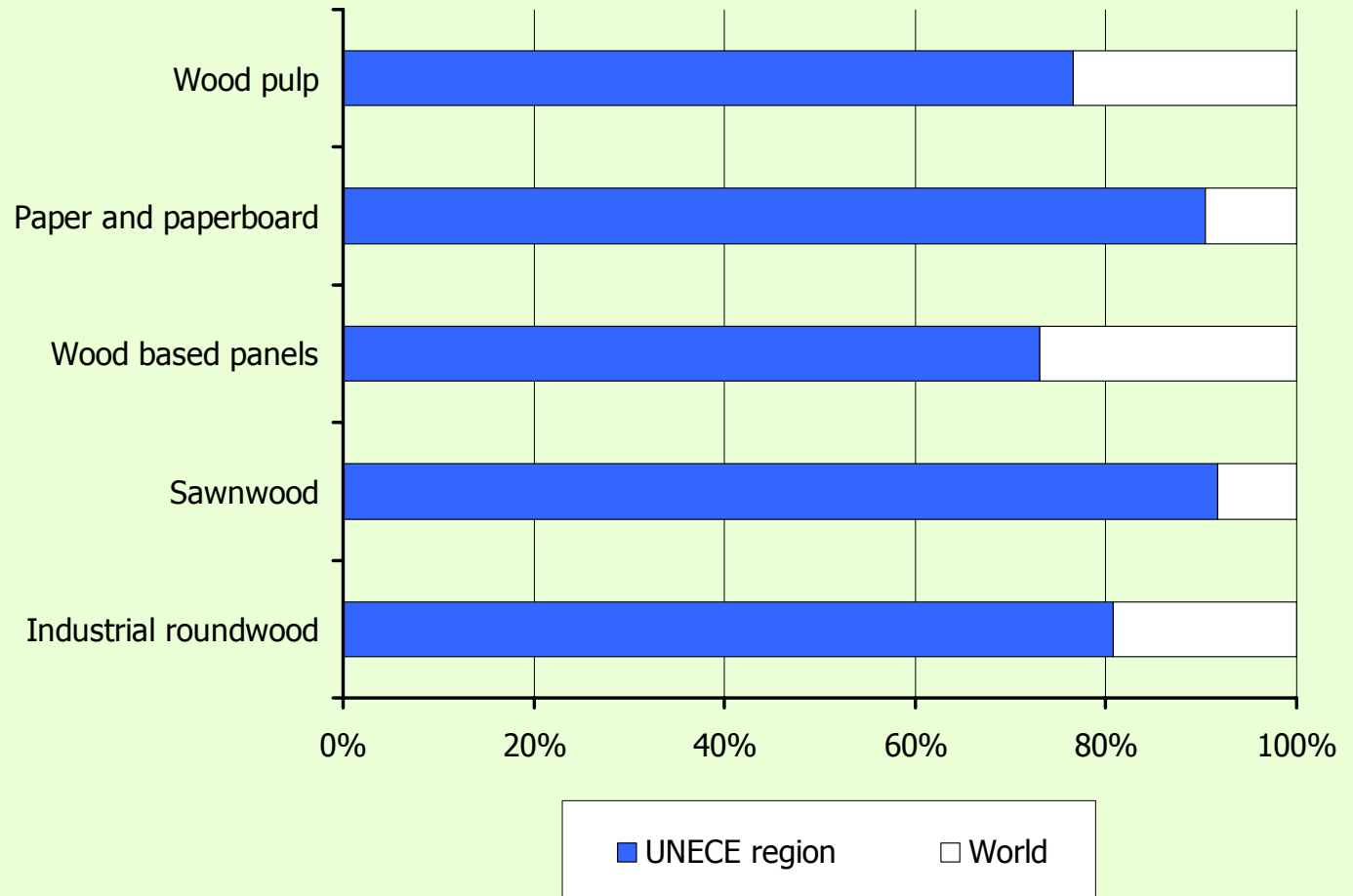
Export of primary products



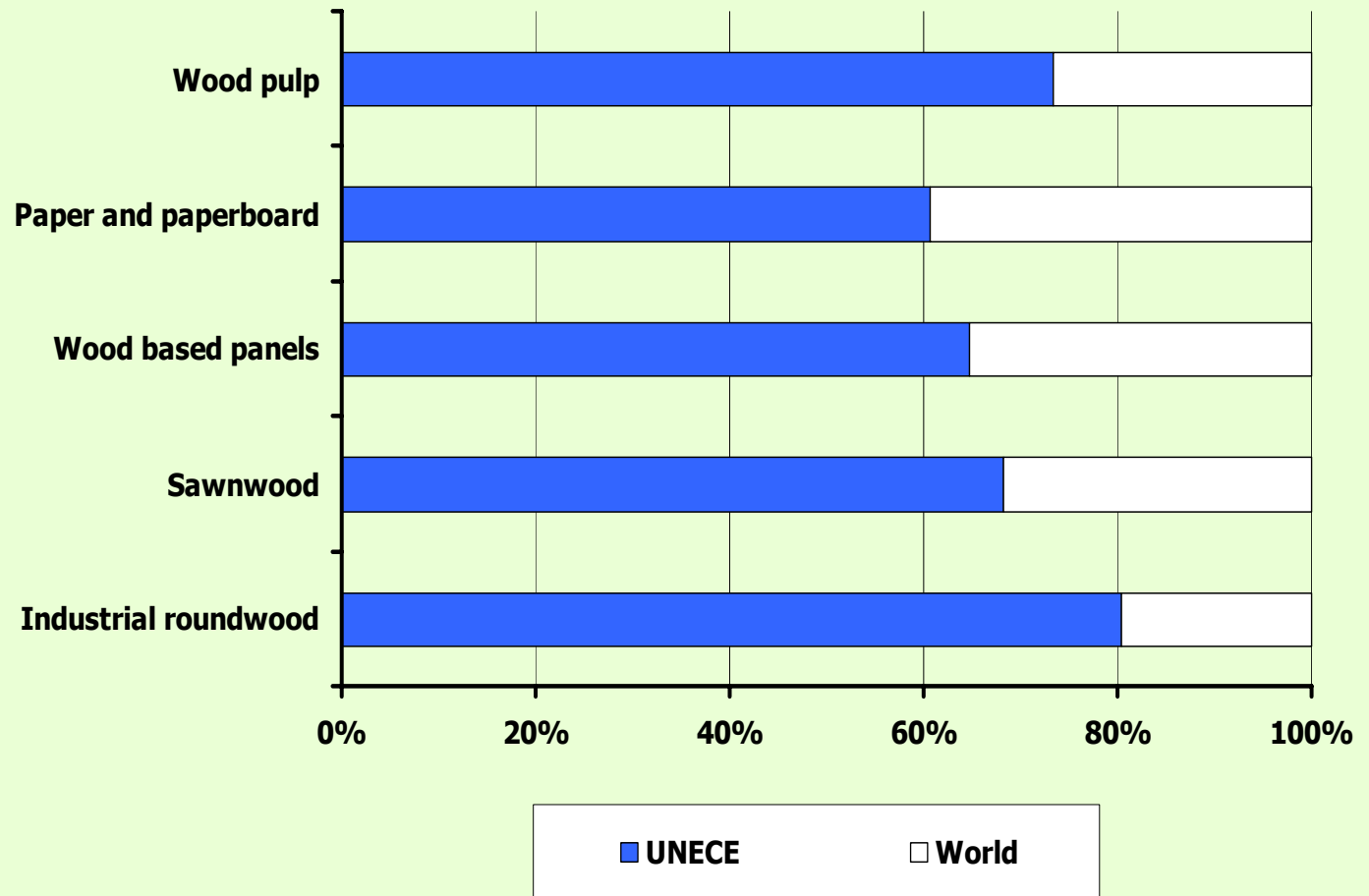
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UNECE region's share of exports



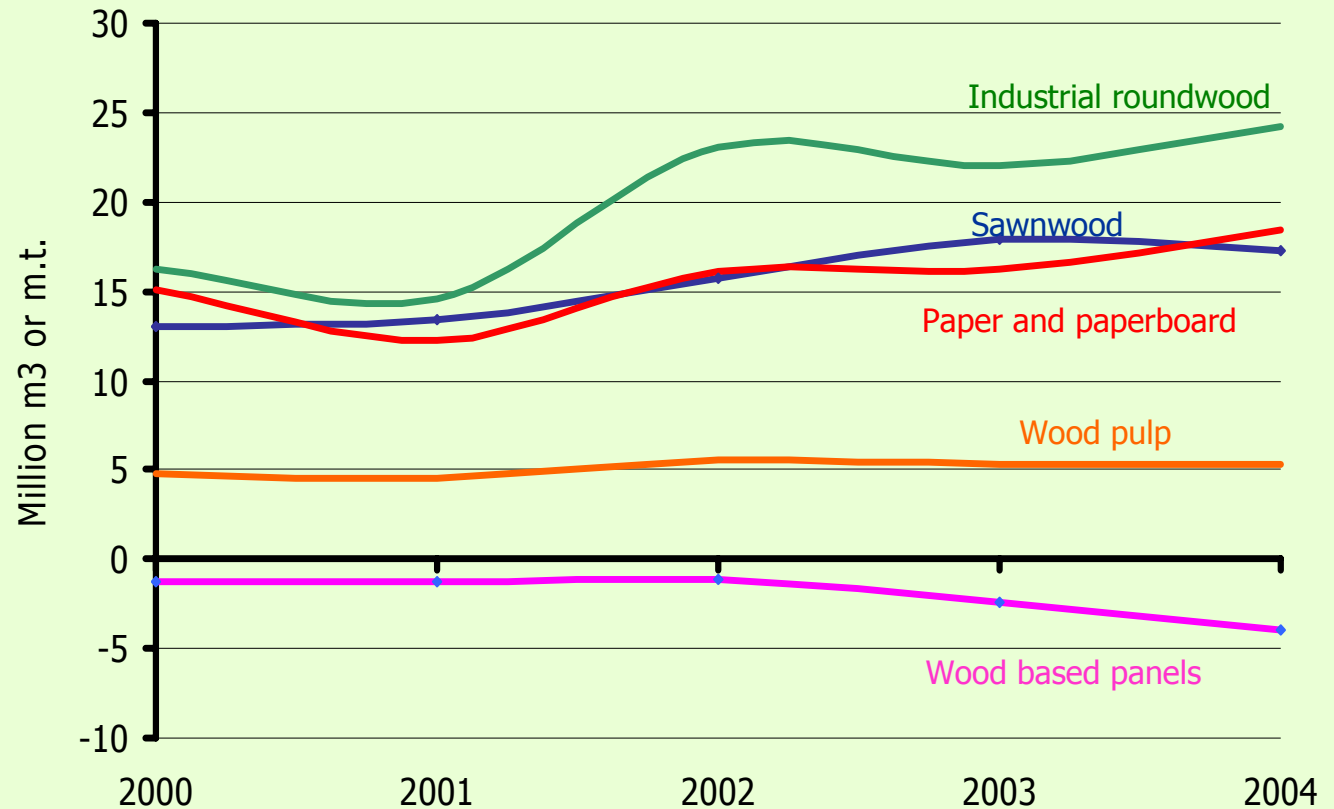
UNECE region's share of production



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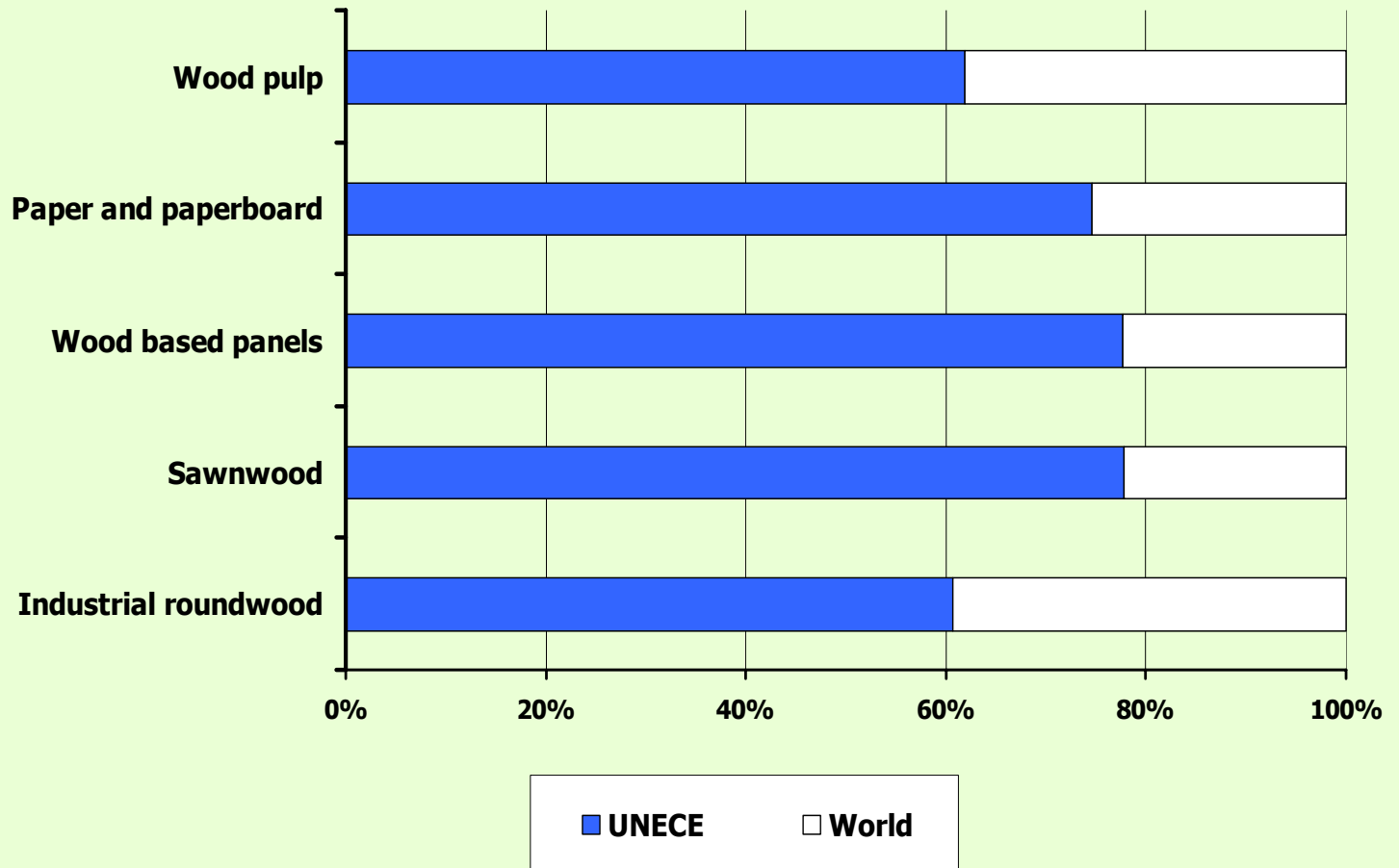
UNECE region's trade balance



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UNECE region's imports



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Where in the world is the UNECE?!

- Majority of world's temperate forests
 - Growing more than consuming
- Consumption and production growing
- Major producing and consuming region of world's primary wood products
 - Produces 63 to 85%
 - Consumes 60 to 80%
- Trade increasing, and major trading region
 - Exports 75 to 90% of world
 - Imports 60 to 80%
- Net exporter for most products



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Game rules for speakers

- Schedule is tight!
 - Be ready, come to head table ahead
 - Don't exceed allotted time
- Green card = 5 minutes left
- Yellow card = 1 minute left
- Red card = STOP !



Next presentations

- Policy implications of forest products market developments, Dr. Ewald Rametsteiner
- Kyoto Protocol's influence on forest products markets and policy, Mr. Pierre Desclos
- Certification's role in corporate responsibility, Dr. Mike Packer

