



Item 4 a: Forest products markets' assessment



37th Joint Working Party on Forest Statistics, Economics and Management
18-20 March 2015, Geneva, Switzerland





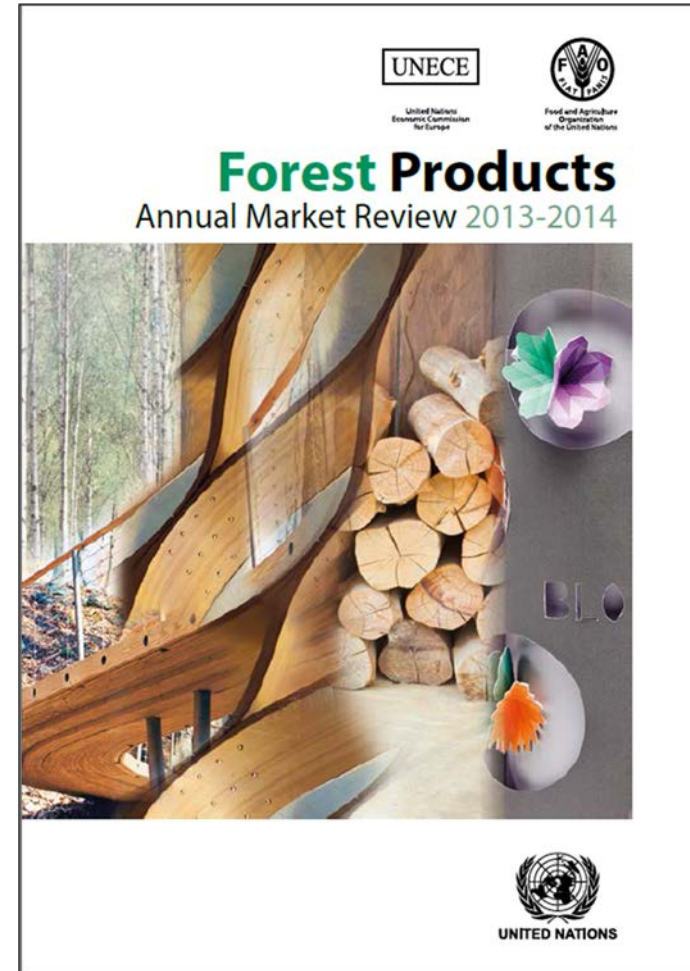
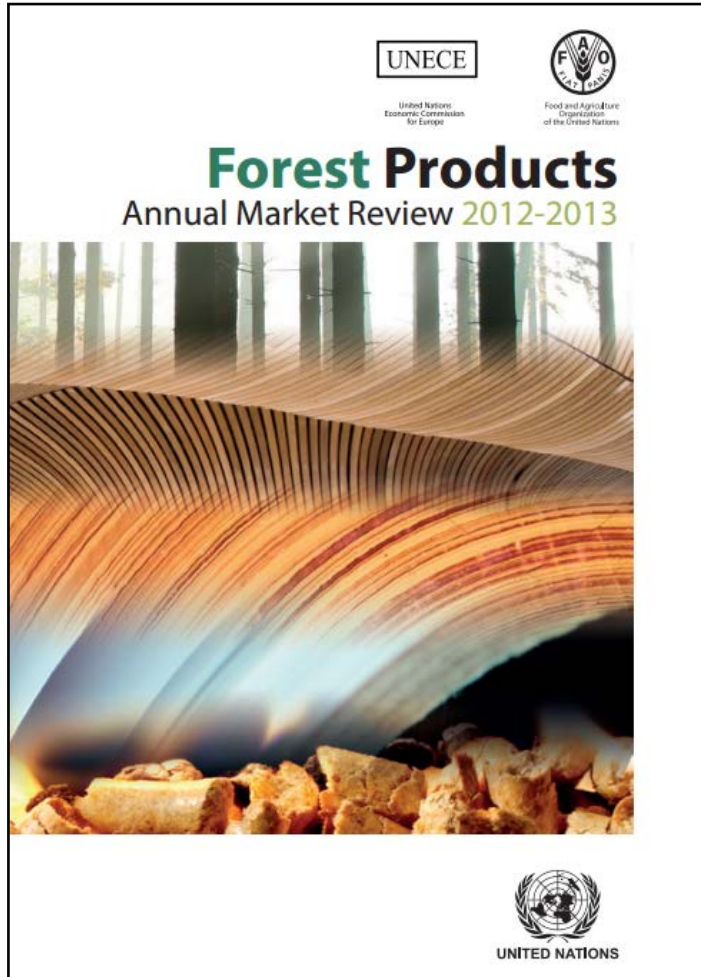
Outline

- Forest Products Annual Market Review
- Country market statements
- Market Discussions 2014
- UNECE/FAO Market statement
- Capacity building?





The FPAMR 2013-2014 - design



FPAMR 2013-2014 - chapters

1. Overview
2. Policies
3. Innovative wood-based products
4. Wood raw material markets
5. Sawn softwood markets
6. Sawn hardwood markets
7. Wood-based panel markets
8. Paper, paperboard and woodpulp markets
9. Wood energy markets
10. Value-added wood products markets
11. Housing and construction markets

2015:
Institutional
Forest Ownership





FPAMR 2013-2014 – data annex

Definitions

Annex Tables

This statistical annex to the *Forest Products Annual Market Review* contains 68 tables showing production and trade data for most products for the three subregions (Europe, CIS, North America) and the more significant countries. Data are for the last five years and for major products forecasts for the current year are available.

Complete forest products data, covering all products and countries is available [here](#).

The product definitions are from the previous questionnaire issued in 2012 in [English](#), [Russian](#) and [HS/SITC classification](#)

Product Group	Product Flow	Unit	File Type
List of Tables			
			PDF XLS click on Excel table list to get to worksheets
Apparent consumption of sawnwood, wood-based panels and paper and paperboard		1000 m ³ /mt/m ³ SWE	PDF
Roundwood			
Industrial Roundwood Balance		1000 m ³	PDF
Apparent consumption of Roundwood		1000 m ³	PDF
Removals of Industrial Roundwood		1000 m ³	PDF
Removals of Softwood Industrial Roundwood		1000 m ³	PDF
Removals of Hardwood Industrial Roundwood		1000 m ³	PDF
Exports and Imports of Industrial Roundwood		1000 m ³	PDF
Exports and Imports of Industrial Roundwood		1000 US\$	PDF

Balance

Apparent consumption

Trade

Production

- Data and Statistics
- Press Releases
- Quick links



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20 Country market statements

- General economic trends;
- Policy measures;
- Market drivers;
- Developments in forest products markets sectors;
- Tables on economic indicators and forest products production and trade in 2012, 2013 and 2014;

2015 Market Statement to include a voluntary chapter on the Forest Sector in a Green Economy





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COFFI Market Discussions 2014

“Forest Products Markets in Europe”

By Jarno Seppälä

“Forest Products Markets in Russia and CIS”

By Nikolai Ivanov

“Forest Products Markets in North America”

By Bruce Glass

“Wood Energy developments overview in North America”

By Richard Vlosky





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UNECE/FAO Market Statement 2014

North America developments to help the Russian forest sector

[Go to Previous Page](#)

Published: 20 November 2014

The North American forest sector experienced a steep decline in the wake of the 2008 global economic crisis, due to the associated downturn in the housing market. Most single-family houses in North America are built with wood, and this downturn had devastating effects on the domestic forest-based industries.



Soon after, from 2009 onwards, Chinese demand for logs and sawn timber from western North America expanded dramatically, driven by policy incentives and relatively low product prices. The demand for timber is expected to surge as the North American housing markets pick up. Russia then will be very well positioned to supply China's ever increasing need for wood. "It is only a matter of time" said Bruce Glass, Senior Forest Economist with Campbell Global, with regard to the market for timber.

Summaries of the Market Discussion of the UNECE Committee on Forests and the Forest Industry in Kazan, Russian Federation on 18 December 2014. At this meeting, more than a 150 participants from 32 countries met to discuss the latest developments, and projected developments for 2015 in the forest sector and related markets.

Among the topics discussed, was the market vulnerability of wood-based energy in North America as a result of its dependence on subsidies and the currently low prices of other energy sources, especially natural gas. At the current time, pellet manufacturing is the most positive market segment for wood energy, but it is almost entirely dependent on export to the EU. There are questions as to whether the citizens of the EU will continue to absorb the high energy costs that result from subsidizing wood energy. "Biofuels are not currently economically viable without subsidies, given current energy costs," said Richard Vlosky, Director of the Louisiana Forest Products Development Center, Louisiana State

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Σ UNECE/FAO Market Statement 2014



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- Forest Products Annual Market Review
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- Workshops?





Workshops?

No capacity building activities in 2014

Workshop planned in September 2014 but postponed to early summer 2015

More information by the Team Leader of the ToS & Item 4d





Thank you for your attention !



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Item 4 (a) II – paragraph 45

The Working Party is invited to:

- a. Comment on the structure of the FPAMR and suggest further modifications if needed.
- b. Provide guidance on how to encourage more active participation from the private sector during Market Discussions.
- c. Ask questions and provide guidance regarding the ToS on Sustainable Forest Products.

