

Turkey Forest Products Annual Market Review 2021

GENERAL DIRECTORATE OF FORESTRY

ANKARA, TURKEY

İçindekiler

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Abstract

The forests in Turkey are managed by the state institution, the General Directorate of Forestry. The forests in Turkey cover 28% of the country's territories, and 99% of them are managed and owned by the state. The main source of income from the forest is timber and harvested wood products, while the main challenge is forest fires, especially in the Mediterranean region. Several other non-wood products action plans have been initiated to ensure sustainable production of non-wood products and to protect biodiversity in forest areas.

Therefore, the forest sector in Turkey was highly affected by the wildfires this year following the Covid-19 crisis.

1. General Economic Trends Affecting the Forest and Forest Industry Sector

In 2020, all countries took essential steps forward for the Covid-19 economic crisis.

In this period, the economic value of the Turkish Liras has dramatically decreased, following the World's economic power has narrowed down by 3.5% while the Turkish economy has risen 1.8% but that situation has caused hyperinflation and needs in US dollar. GDP guess based on production model is seen at 29.1% higher than last year in the same period and the result is 1 trillion 386 billion 347 million TL.

Based on IMF expectation for Turkey unemployment rate, Covid-19 has affected dramatically unemployment rate that was 17.2% in 2021 which is foreseen as 12.4% soon.

2. Recent Legislation and Policy Measures

The developments and growing demand for forest products are not sufficient to provide the amount of the needed products for the forest industry. Thus, the industrial plantation movement is a crucial point for this need. The needed demands are provided with fast-growing domestic and foreign species products planted on industrial plantation areas.

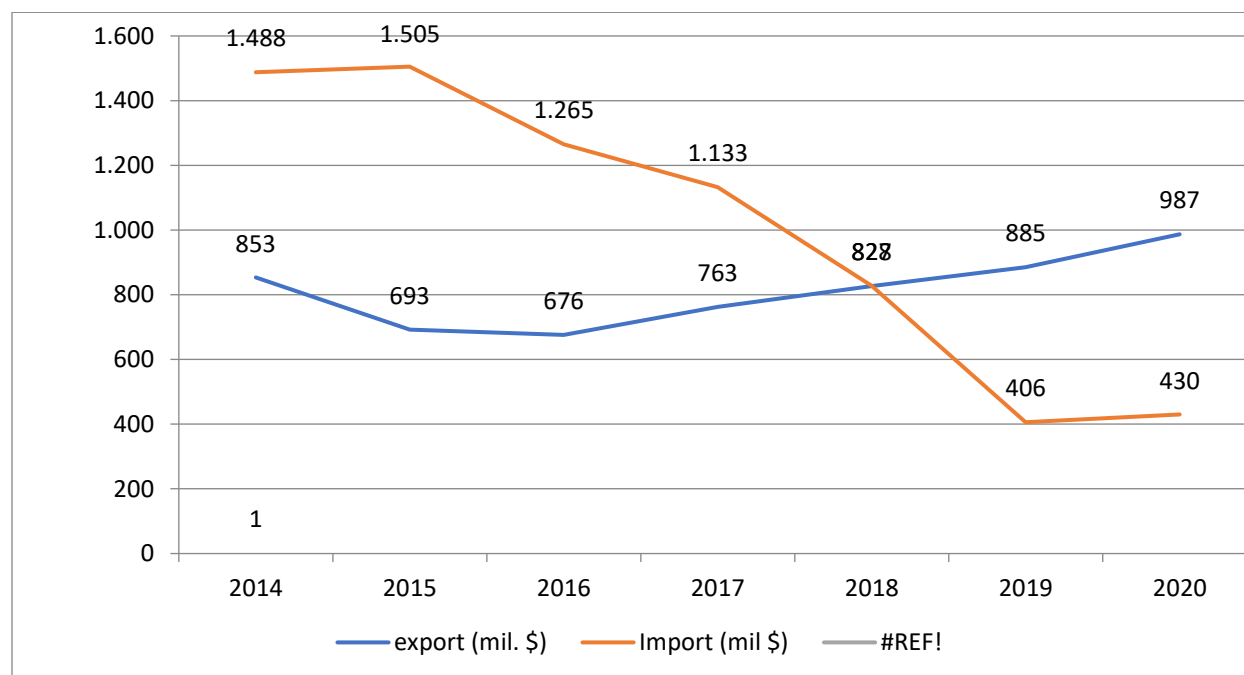
Despite growing production, forest products prices continue based on Turkish Liras.

Under the incentive which enable generating electricity from sustainable products had important developments during last 2 years. the forest product demands to 15 firms for generating electricity are provided in 2020 and 28 other factories have requested forest products for this incentive for 2021.

3. Market Drivers

3.1. Trade

The consumed round wood amount is nearly 30 million m³, 4.5 million m³ of that amount was imported in 2017 but today imported amount was decreased about 600.000 m³. the amount of demand by the forest sector is usually taken care of by domestic supplies.



The increase of round wood production depends on the supply and demand balance, if the demand is low then producing process is slow down. Especially after 2018, based on the demand for round wood has risen so the production is increased. the most important point while increasing production is having a sustainable forest policy.

3.2. Certification

OGM has taken FSC (Forest Stewardship Council) certification for 6.577.142 ha so 29% of Turkish Forest area are certified.

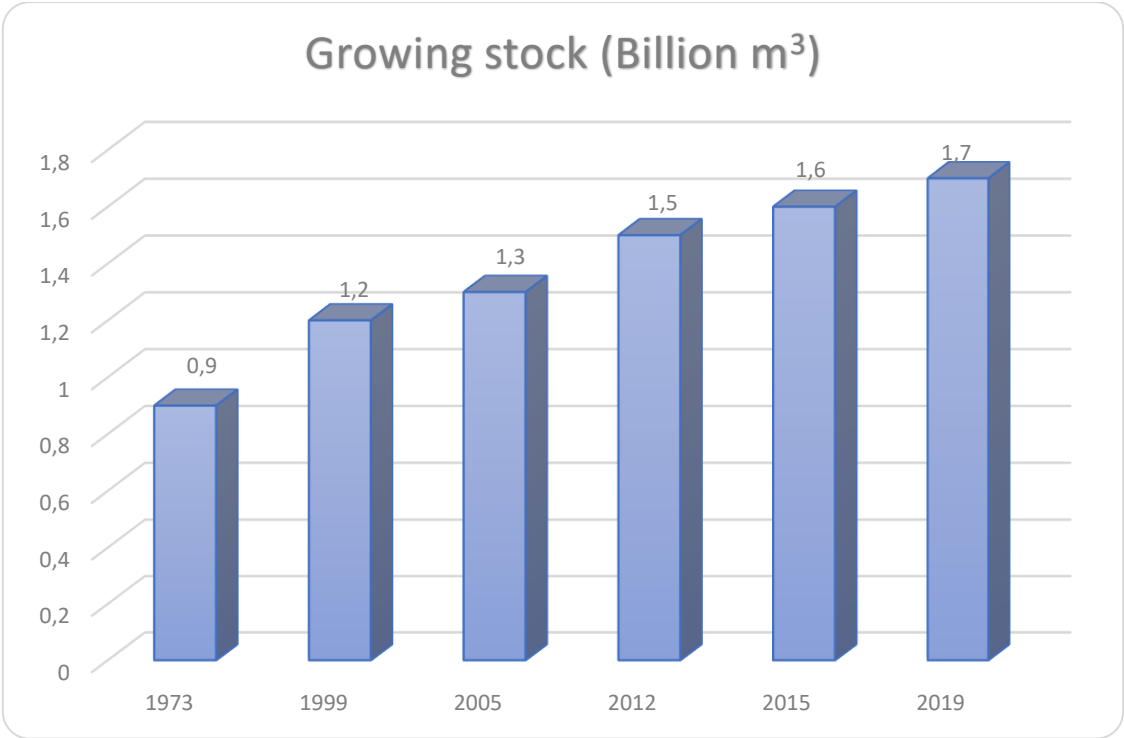
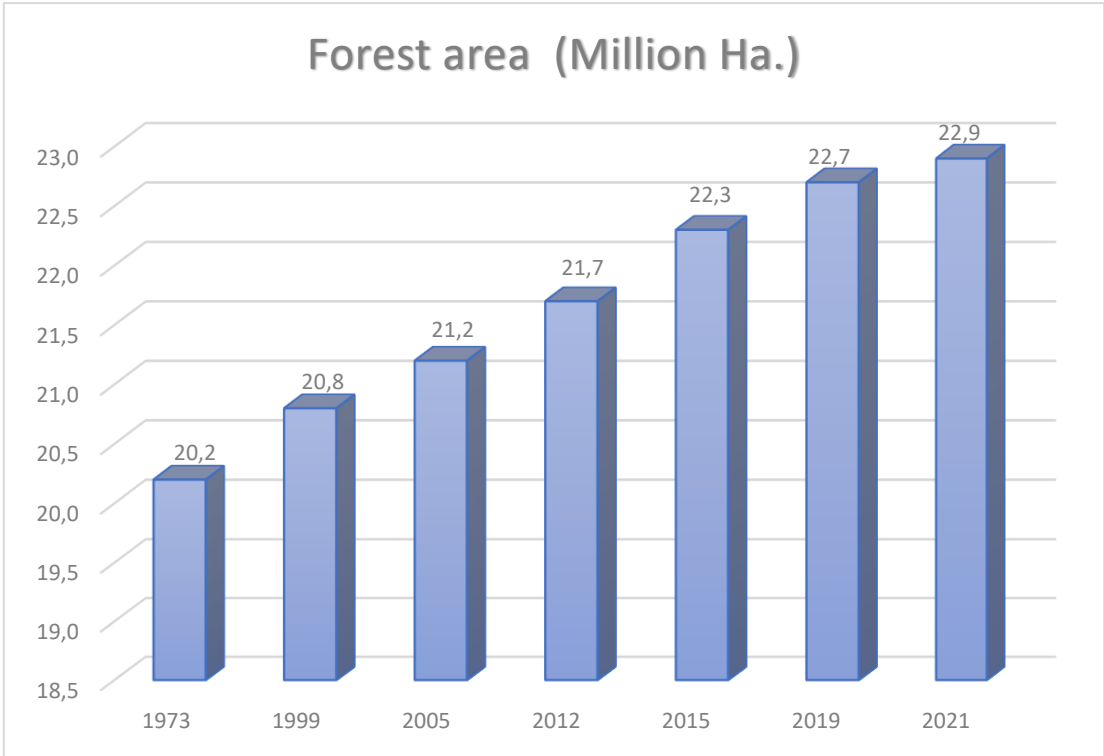
The ongoing production in Turkish forests is run by forest villagers. Under the agreement between the General Directorate of Forestry and the Ministry of Education, it provides education about work safety, production, standardization, emergency and tested them to be qualified for capable foresters and these tests have been applied for 150.000 people so far.

4. Developments in forests and forest products markets sectors

4.1. Wood Raw Materials

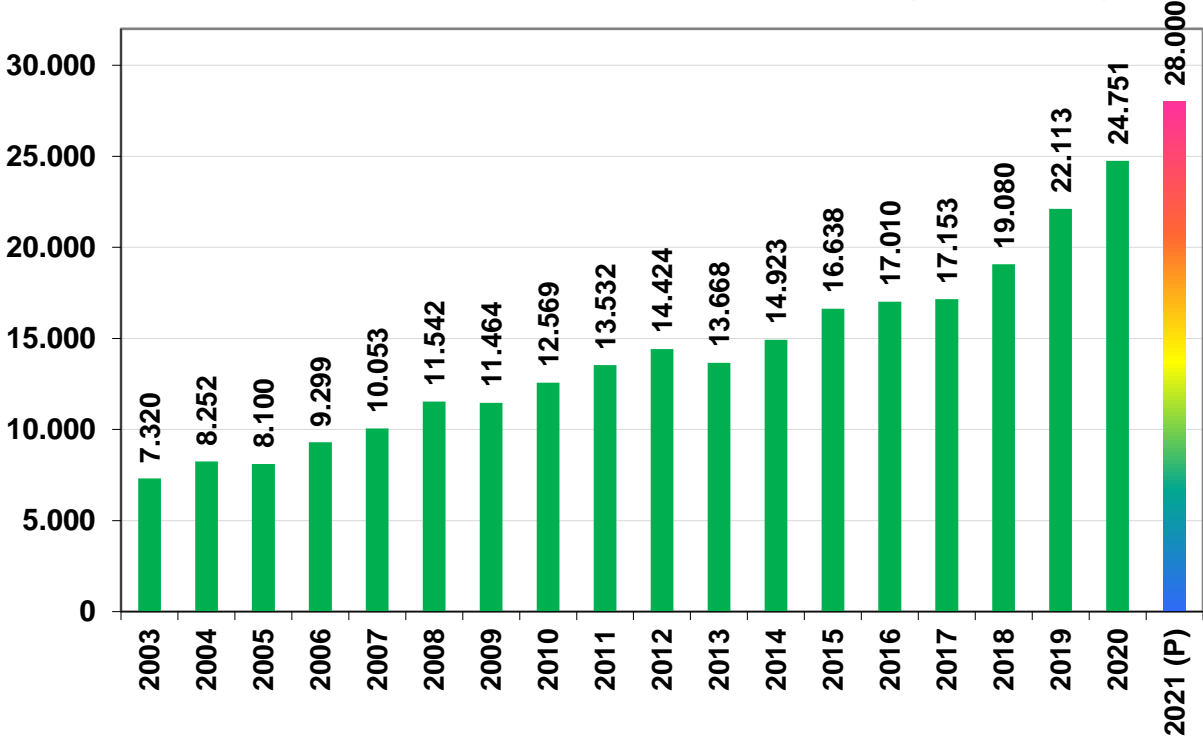
While the forest assets in the world have decreased, Turkey is one of the unique countries that increase its forest area. The presence of forests in Turkey has been increased by 2.5 million ha more since 1973. During this period, the property of Turkey's forest was gone up approximately

2.5 times more. The policy of increasing forest area in Turkey is accepted by the Turkish Government besides Turkish government makes effort to plant in new areas each year.



99% of Turkish Forest is owned and managed by the state. In these forests managed by the Turkish government, The government produced 7.3 million ha industrial plantation while 25,6 million ha planned for 2021.

Industrial Roundwood Production (1000 m³)



5. Tables

Product Code		Product	Unit	Historical data		Revised	Estimate	Forecast
				2018	2019	2019	2020	2021
1.2.1.C		SAWLOGS AND VENEER LOGS, CONIFEROUS						
		Removals	1000 m ³ ub	7.393	7.400	7.400	10.400	10.500
		Imports	1000 m ³ ub	50 #	40 #	7	20	20
		Exports	1000 m ³ ub	20 #	10 #	37	40	40
		Apparent consumption	1000 m ³ ub	7.423	7.430	7.370	10.380	10.480
1.2.1.NC		SAWLOGS AND VENEER LOGS, NON-CONIFEROUS						
		Removals	1000 m ³ ub	2.860	3.000	3.000	3.200	3.250
		Imports	1000 m ³ ub	40 #	20 #	52	60	60
		Exports	1000 m ³ ub	10 #	5 #	31	35	35
		Apparent consumption	1000 m ³ ub	2.890	3.015	3.021	3.225	3.275
1.2.1.NC.T		of which, tropical logs						
		Imports	1000 m ³ ub	40 #	30 #	0	0	0
		Exports	1000 m ³ ub	1 #	1 #	0	0	0
		Net Trade	1000 m ³ ub	39	29	0	0	0
1.2.2.C		PULPWOOD (ROUND AND SPLIT), CONIFEROUS						
		Removals	1000 m ³ ub	6.803	6.900	6.900	7.400	7.500
		Imports	1000 m ³ ub	3 #	3 #	3	3	3
		Exports	1000 m ³ ub	1 #	1 #	1	1	1
		Apparent consumption	1000 m ³ ub	6.805	6.902	6.902	7.402	7.502
1.2.2.NC		PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS						
		Removals	1000 m ³ ub	4.608	4.600	4.600	4.700	4.700
		Imports	1000 m ³ ub	2 #	2 #	2	2	2
		Exports	1000 m ³ ub	1 #	1 #	1	2	2
		Apparent consumption	1000 m ³ ub	4.609	4.601	4.601	4.700	4.700
3		WOOD CHIPS, PARTICLES AND RESIDUES						
		Domestic supply	1000 m ³	980 C	950 C	950	950	1.000
		Imports	1000 m ³	2.427 C	446 C	446	450	450
		Exports	1000 m ³	6 C	25 C	25	25	25
		Apparent consumption	1000 m ³	3.401	1.371	1.371	1.350	1.350
1.2.3.C		OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS						
		Removals	1000 m ³ ub	734	730	730	750	750
1.2.3.NC		OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS						
		Removals	1000 m ³ ub	68	70	70	100	100
1.1.C		WOOD FUEL, CONIFEROUS						
		Removals	1000 m ³ ub	2.402	2.450	2.450	2.500	2.500
1.1.NC		WOOD FUEL, NON-CONIFEROUS						
		Removals	1000 m ³ ub	3.286	3.300	3.300	3.400	3.500



TF1
TIMBER FORECAST QUESTIONNAIRE
Roundwood

Country: Turkey	Date:
Name of Official responsible for reply:	
Official Address (in full):	
Telephone:	
E-mail:	

Note:
Complete only if data
for 2019 have been
revised.



TF2

TIMBER FORECAST QUESTIONNAIRE Forest products

Country: Turkey	Date:
Name of Official responsible for reply:	
Official Address (in full):	
Telephone:	
E-mail:	
<div style="border: 1px solid black; padding: 2px; display: inline-block;"> Note: Complete only if data for 2019 have been revised. </div>	

Product Code	Product	Unit	Historical data		Revised 2019	Estimate 2020	Forecast 2021
			2018	2019			
6.C	SAWNWOOD, CONIFEROUS						
	Production	1000 m ³	5.915	5.950	5.950	8.320	8.400
	Imports	1000 m ³	750	382	382	350	350
	Exports	1000 m ³	38	100	100	110	110
	Apparent consumption	1000 m ³	6.627	6.232	6.232	8.560	8.640
6.NC	SAWNWOOD, NON-CONIFEROUS						
	Production	1000 m ³	2.290	2.400	2.400	2.560	2.600
	Imports	1000 m ³	69	60	60	60	60
	Exports	1000 m ³	16 E	35 E	35	40	40
	Apparent consumption	1000 m ³	2.343	2.425	2.425	2.580	2.620
6.NC.T	of which, tropical sawnwood						
	Production	1000 m ³	5	5	5	0	0
	Imports	1000 m ³	32	22	22	20	20
	Exports	1000 m ³	1	2	2	0	0
	Apparent consumption	1000 m ³	36	25	25	20	20
7	VENEER SHEETS						
	Production	1000 m ³	74 C	74 C	74	70	70
	Imports	1000 m ³	99 C	26 C	64	60	60
	Exports	1000 m ³	31 C	4 C	34	30	30
	Apparent consumption	1000 m ³	142	96	104	100	100
7.NC.T	of which, tropical veneer sheets						
	Production	1000 m ³	5 R	5 R	5	0	0
	Imports	1000 m ³	3	4	4	0	0
	Exports	1000 m ³	7	1	1	0	0
	Apparent consumption	1000 m ³	1	8	8	0	0
8.1	PLYWOOD						
55	Production	1000 m ³	112 C	115 C	150	300	300
45	Imports	1000 m ³	130 C	46 C	46	40	40
	Exports	1000 m ³	21 C	44 C	44	50	50
	Apparent consumption	1000 m ³	221	117	152	290	290
8.1.NC.T	of which, tropical plywood						
	Production	1000 m ³	5	5	4	0	0
	Imports	1000 m ³	4	2	2	2	2
	Exports	1000 m ³	1	0 E	0	0	0
	Apparent consumption	1000 m ³	8	7	6	2	2
8.2	PARTICLE BOARD (including OSB)						
	Production	1000 m ³	4.430	4.450	4.450	4.300	4.350
	Imports	1000 m ³	204	151 E	190	170	170
	Exports	1000 m ³	873	823 E	883	850	850
	Apparent consumption	1000 m ³	3.761	3.778	3.757	3.620	3.670
8.2.1	of which, OSB						
	Production	1000 m ³	75	80	80	50	50
	Imports	1000 m ³	145	138	138	130	130
	Exports	1000 m ³	3	4	4	5	5
	Apparent consumption	1000 m ³	217	214	214	175	175
8.3	FIBREBOARD						
	Production	1000 m ³	4.970 C	4.900 C	4.943	5.000	5.100
	Imports	1000 m ³	53 C	33 C	33	32	32
	Exports	1000 m ³	340 C	374 C	374	375	375
	Apparent consumption	1000 m ³	4.683	4.559	4.602	4.657	4.757
8.3.1	Hardboard						
	Production	1000 m ³	0	0	130	130	130
	Imports	1000 m ³	38	22	22	20	20
	Exports	1000 m ³	17 E	28 E	142	145	145
	Apparent consumption	1000 m ³	21	-6	10	5	5
8.3.2	MDF/HDF (Medium density/high density)						
	Production	1000 m ³	4.910	4.800	4.700	4.750	4.850
	Imports	1000 m ³	15	11	11	12	12
	Exports	1000 m ³	181 E	233 E	119	120	120
	Apparent consumption	1000 m ³	4.744	4.578	4.592	4.642	4.742
8.3.3	Other fibreboard						
	Production	1000 m ³	60	100	113	120	120
	Imports	1000 m ³	0	0 E	0	0	0
	Exports	1000 m ³	142	113	113	110	110
	Apparent consumption	1000 m ³	-82	-13	0	10	10
9	WOOD PULP						
	Production	1000 m.t.	70 C	70 C	70	70	80
	Imports	1000 m.t.	1.261 C	1.375 C	2.572	1.951	1.951
	Exports	1000 m.t.	12 C	43 C	134	115	115
	Apparent consumption	1000 m.t.	1.319	1.402	2.508	1.906	1.916
12	PAPER & PAPERBOARD						
	Production	1000 m.t.	2.800 C	2.800 C	2.800	2.800	2.800
	Imports	1000 m.t.	2.675 C	2.417 C	2.417	5.222	5.222
	Exports	1000 m.t.	960 C	882 C	882	1.557	1.557
	Apparent consumption	1000 m.t.	4.515	4.335	4.335	6.465	6.465
5.1	WOOD PELLETS						
	Production	1000 m.t.	20 E	20 E	20	25	25
	Imports	1000 m.t.	0	0 E	0	0	0
	Exports	1000 m.t.	15	14	14	15	15
	Apparent consumption	1000 m.t.	6	6	6	10	10