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STATEMENT ON THE WOOD MARKET REVIEW AND PROSPECTS

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1. GENERAL ECONOMIC TRENDS AFFECTING FORESTS AND FOREST INDUSTRIES SECTOR

In 2021 Gross Domestic Product in Poland, having demonstrated a significant drop in 2020 (2.2% in relation to the previous year), increased 5.9% in real terms, despite the persisting Covid-19 pandemic and its noticeable effects. Domestic demand was the primary factor of economic growth (its positive effect on GDP increase was 7.1 percentage point, and its 7.6% increase contrasted with its 2.9% decrease in the previous year). The economy was positively stimulated by both consumption (a 5.3% increase, while household consumption reached a 6.1% increase thanks to improved consumer sentiment) and investment demand (gross accumulation increased 17.7%, including a 3.8% increase in outlay on fixed assets). In 2021 gross added value increased 5.6% in relation to the previous year; however, the growth was mainly observed in industry (14.2%) and transport and warehousing management (14.3%). On the other hand, the GDP growth was affected by the foreign trade balance (-1.2 percentage point). Bearing in mind present conditions, it is assumed that in the period 2022-2023 GDP growth, in real terms, will be 4.6% and 1.7%, respectively. It is probable that in the coming years dynamics of domestic demand will decrease to 4.8% and 1.2%, respectively, and of consumption to 3% and 1.9%, respectively. The relatively good private consumption dynamics (3.9% and 2.2%, respectively) is to be supported by relatively well conditions on the labour market, the actions connected with reduction of taxes, and consumption expenditure of Ukrainian refugees. Nonetheless, it is hard to predict the extent to which the persistent high inflation rate will affect private consumption dynamics (in August 2022 the inflation rate was 16.1% in relation to August 2021; the prognosis assumes 13.5% at the end of 2022, and 9.8% in 2023). After a 11.3% growth in accumulation in 2022, a decrease of (-1.2%) is forecasted in 2023. At the same time, gross outlay on fixed assets is to increase (4.9% and 6.2%, in 2022 and 2023 respectively) thanks to the growth of public investment (inter alia, higher spending on defense reaching 3% of GDP).

The industry has demonstrated very good results in 2021. Sold production of industry increased 14.4% in fixed prices (in 2020 it decreased 1.9%), and manufacturing grew 13.7% (a 2.1% decrease in the previous year). The sales of the wood sector amounted to PLN 206.7 billion ($ 53.5 billion, € 45.3 billion), which was more than 10% of sold production of industry and almost 12% of sold production of manufacturing. In wood industries the actual dynamics of sold production growth was higher than in industry and manufacturing and equalled 18.6% in the wood industry (whose share within the structure of sold production of the wood sector was more than 31%), 15.1% in the pulp and paper and paper processing industry (whose share within the sector's sales was more than 34%), and 22.9% in the furniture industry (which with a more than 38% share within sold production of the wood sector is its dominant industry). Nevertheless, the results for H1 2022 suggest worsening of the situation – there is a noticeable drop in sales dynamics, also in the wood sector (primarily in the furniture industry, where the sold production growth is reduced to approximately 9% in relation to the corresponding period of the previous year). The general economic conditions are assessed more pessimistically than formerly. It can be assumed that the results of industry, manufacturing, and the wood sector will be worse in 2022 than in the previous year. Increasing uncertainty as to the development of economic conditions means that this trend could also continue in 2023.

In 2021 situation on the labour market slowly improved. At the end of 2021 registered unemployment rate decreased to 5.4% (it was 6.3% in 2020). A slight (0.3%) increase in employment in industry (in the company sector) was observed, as was a 0.6% increase in manufacturing. The wood sector demonstrated a higher increase, i.e. 2% in the wood industry, 1.6% in the pulp and paper and paper processing industry, and 3.3% in the furniture industry. It is estimated than in 2021 the wood sector employed 354 thou. people (33% in the wood industry, 18% in the pulp and paper and paper processing industry, and 49% in the furniture industry). This was more than 12% in relation to industry in total and almost 14% in relation to manufacturing. Forestry employed approximately 42 thou. people (1 thou. less than in the previous year). These positive trends on the labour market are to continue in 2022 - it is assumed that at the end of year registered unemployment rate will have fallen to 5%, At the end of the following year will have been 5.4%. Average employment in economy will have in 2023 decreased slightly (-0.5%) after a 1.8% increase in 2022. These phenomena should be accompanied by about 1% increase in salaries in real terms.

In 2021 in Poland foreign trade turnover was much higher than in the previous year, i.e. export amounted to PLN 1316 billion ($ 342 billion, € 288.1 billion) and import to PLN 1323 billion ($ 343.5 billion, € 289.6 billion). The high dynamics of domestic demand was reflected in high increase in import (15.9% in fixed prices), which, accompanied by lower dynamics of export (11.8%), resulted in a negative foreign trade balance (PLN -7 billion, $ -1.5 billion, € -1.5 billion). Export was strongly affected by supply problems, especially those connected with the availability of raw materials and components and the increase in their prices. Approximately 9% of the value of Polish exports was wood and wood products (PLN 112.2 billion, $ 29.2 billion, € 24.6 billion), of which more than 51% was furniture (one of the most important commodity groups in Polish export). On the other hand, the share of wood and wood products in Polish imports was more than 4% (PLN 55.1 billion, $ 14.3 billion, € 12.1 billion), and they were mostly products of the pulp and paper and paper processing industry (their share was more than 50%). Poland's foreign trade partners (in export as in import) were primarily the European Union countries (with the shares of 75% and 54%, respectively), and Germany continued to be the main trade partner of Poland (almost 29% of export and almost 21% of import). The EU share within the foreign trade in wood and wood products was higher than the average for Poland and equalled more than 80% in export and 61% in import. It is assumed that in 2022 real export dynamics (+2.7%) will be slightly higher than import dynamics (+ 2.5%), however, in 2023 export growth (1.3%) is expected to be higher than import growth (0.5%).

Nonetheless, the situation in Polish economy, as well as in the European and global, is very dynamic. All present prognosis are burdened with higher than previously uncertainty and the perspectives of economic growth in the near future are significantly changed due to the persisting pandemic, but especially due to the outbreak of war in Ukraine and its results, which are hard to estimate at the time being, as well as due to the consequences of restrictions imposed on Russia and Belarus, the worsening of consumer sentiment, the anticipated drop in global economy dynamics, the increase in prices of raw materials (including especially raw materials for energy), and distortions of global supply chains and financial markets.

2. POLICY MEASURES TAKEN IN POLAND OVER THE PAST 18 MONTHS, WHICH MIGHT HAVE A BEARING ON FOREST MANAGEMENT OR PRODUCTION AND TRADE OF FOREST PRODUCTS

Medium-term lines of development of socio-economic policy in Poland, including the policy in the forestry-wood sector, are yearly outlined in the *Multiannual Financial Plan of the State*, presently prepared for the years 2022-2025. Simultaneously, this *Plan* is the basis on which the next budget bill is drafted, as well as it encompasses the convergence programme (update for 2022) which includes a medium-term prognosis of the economic situation of Poland and its public finances till 2025 and defines main goals of the state together with the measures of their attainment. The *Plan* is supplemented by the *National Programme of Reforms 2022/2023*, which presents a review of structural reforms implemented in connection with the EU strategy, called the European Green Deal, and recommendations of the European Council for Poland issued in 2019 and 2020. The *Programme* includes solutions implemented under the *National Plan of Restoration and Resilience Enhancement (KPO)* as well as other reforms in line with the development path outlined by current recommendations of the Council. The already implemented and the planned actions alike are to contribute to the economic restoration after the pandemic and to mitigation of the results of military conflict in Ukraine. The envisaged reforms and investments concern such areas as: resilience and competitiveness of the economy, green energy and reduction of energy consumption, digital transformation, efficiency, availability and quality of the healthcare system, and green and intelligent mobility. The document's time horizon is the end of August 2026.

The long-term *State Development Concept 2050* (*KRK 2050*) is also being prepared with the view of substituting it for the existing *Strategy for Responsible Growth till 2020 (with a time horizon till 2030)*, which assumes support for inclusive economic growth, while maintaining a long-term stability of public finances. The *Concept* is to outline the long-term directions of state development management and to be a document which will combine socio-economic planning with spatial planning. It is also to identify key social, economic, environmental and spatial trends (national and global), define the most important developmental issues for Poland and possible development scenarios, as well as recommend strategic alternatives regarding public policies within the time horizon of 2050.

From the perspective of the market in wood and products of its processing (especially value-added products such as furniture, which is one of the basic goods in Polish exports) the presently drafted document indicating main directions of export policy of Poland will be of importance. The document is to define the challenges facing Polish export in the post-pandemic (and also post-war) reality and to set directions of actions which will facilitate rising to these challenges. The main goals outlined in the document concern the enhancement of internationalisation of Polish companies (especially small and medium enterprises - SMEs), strengthening of economic relations with the EU countries, increasing the share of non-EU countries in Polish export, moving of Polish exports to higher stages within the global added-value chains (including the especially innovative industries), and the enhancement of the share of high-tech products within exports.

The labour market is a significant element of business environment. The update of the *Labour Code*, which is presently being drafted and which is to become effective by the end of this year, introduces the concept of remote work to Polish law and regulates the issues connected with it (Covid-19 pandemic brought popularisation of remote work, both regular and occasional). The changes also concern the conclusion and termination of fixed-term and open-ended employment contracts, which will make the employment forms more flexible and allow the effective use of human resources, while assuring a better work-life balance. The actions towards longer employment of the elderly (60+) and the amendment to the *act on employment promotion and labour market institutions* (2022), which specifies the tasks of the state leading to full and effective employment, the development of labour resources and increase in its mobility, and the increase in labour quality, are also regarded as contributing to favourable changes on the labour market.

All simplifications that limit the regulatory burden resulting from the elaborate law system are of immense importance to entrepreneurs, also those from the forestry-wood sector. This goal is to be attained by the so-called *legal shield* already adopted by the Government of the Republic of Poland – a set of amendments to more than forty acts (July 2022). The set encompasses new solutions such as: the possibility of simplified proceedings or tacit handling of the case, the introduction of the possibility of single instance handling of certain cases, and electronification of selected procedures. There is also continuance of the actions connected with digitalisation of the administration, such as digitalisation of services and processes of the National Tax Administration or creation of the *Entrepreneur's Account* on the web site

Biznes.gov.pl, which enables an entrepreneur to easily register their business as well as to access and manage company data in the Central Register and Information on Economic Activity (CEIDG). These solutions should have a positive effect on the labour market and entrepreneurship development.

3. MARKET DRIVERS

Polish economy and the wood market still suffers from the consequences of Covid-19 pandemic as well as the military conflict in Ukraine. These consequences are to be counteracted by the introduction of tools mitigating the effects of the growing crisis in Europe, primarily the rapidly growing inflation rate, including the increasing prices of energy resources. The subsequent *Anti-inflationary shields* reduced VAT on many goods and services (such as natural gas, systemic heat, basic food products, fuel, electricity, and fertilisers) and excise tax on electricity. They also introduced the so-called *protection allowance* for low-income households. The consequences of sanctions imposed on Russia and Belarus are to be counteracted by, inter alia, the *coal allowance* for households whose heat source is coal or coal-based fuels. It is also planned to implement a system of compensations to average prices of heat generation for households and public institutions.

The war in Ukraine has increased migration from Ukraine to Poland (especially of women and children). Actions supporting the immigrants (access to health care, education, studies, labour market and social benefits, and support for people giving aid) are regulated in the *act on assistance to Ukrainian citizens in connection with the military conflict on the territory of this country* (March 2022). All foreigners, including Ukrainian citizens, are the addresses of the *Departmental Activation Programme for Foreigners* for the years 2022-2025 *"Together we can do more"*. The assumed in the Programme integration of immigrants in society and on the labour market is of especially high importance in current demographic situation and where there is a growing shortage of employees, also in the forestry-wood sector.

The implementation of the *State's Procurement Policy for 2022-2025* is important for the entities in the forestry-wood sector, and especially for the large group of small and medium-sized companies that are public procurement contractors. The aim of this *Policy* is to increase the effectiveness of public procurement in Poland and to provide its better connection with strategic goals of the state. The *Policy* introduces a new tool, i.e. a certification mechanism of public procurement contractors, which is to support the SME sector contractors. The *Policy* promotes procurement supporting innovativeness as well as the energy-saving and environmentally friendly solutions. It also defines a new organisational model of purchasing units, stresses common and central procurement, introduces an obligation to have a separate budget for innovative procurement and to apply certain purchase categories, and makes recommendations for *green* procurement.

The new *Productivity Strategy*, with an action horizon till 2030, is an update and continuation of the previously effective *Strategy for Innovativeness and Effectiveness of Economy*. The *Productivity Strategy's* primary goal is productivity growth in the conditions of low-emission, closed-loop and data-based economy, i.e. preparation of the economy and the labour market for the fast-occurring changes related to digitalisation and industry 4.0. The *Strategy* assumes, inter alia, an increase in raw material efficiency of the economy and use of renewable raw materials and biomass; automation, robotisation and digitalisation of companies; growth of personnel competence as needed in digital economy; the improvement of management quality in companies; and more intense use of knowledge and technology in the economy. The *Strategy* is to strengthen the competitive position of Polish economy and individual companies on the global market.

Building of a knowledge-based economy and strengthening of its competitiveness is also to be achieved through the currently consulted reform of the *Industrial property law*. The new regulation is aimed at streamlining the proceedings before the Patent Office of the Republic of Poland, reduction of costs of obtaining and maintaining protection from industrial property rights, as well as digitalisation and modernisation of related processes. The proposed solutions included, inter alia, initial application for an invention (simplified application allowing one to reserve the priority date of an application for an invention), introduction of a classified information deposit allowing for more effective protection of know-how, changes in the system of examination of utility models (replacement of the examination system with a registration system and extension of the scope of works that can be covered by such protection), and introduction of a regulation concerning the protection of geographical markings for non-agricultural products.

Social changes, taking place in Poland in recent years, should also be noted. On the one hand the society demands higher utilisation of ecological and renewable resources such as wood in the production of material goods. On the other hand it is expected that forest resources will be protected by the exclusion of forest areas from forest management. In the context of the stimulation of the wood market the vital question is the role of the sustainable forest management in the development of bioeconomy. Only this form of forest management may guarantee the development of further link in the supply chain of forest products.

4. DEVELOPMENTS IN FORESTS AND FOREST PRODUCTS MARKETS SECTORS

4. (A) **Wood raw materials**

After a considerable drop in roundwood harvesting in 2020 in Poland (a 6% decrease compared to the previous year), a 6% increase was recorded in 2021 and the amount of roundwood harvested was 43.1 million m^3 (including approximately 0.9 million m^3 of wood from afforested areas). Softwood accounted for 77% (33.3 million m^3) of harvested roundwood and industrial wood for almost 90% (38.6 million m^3 and it was almost 8% more than in the previous year). Approximately 50% of industrial wood was pulpwood (19.5 million m^3; a 6% increase compared to the previous year), 48% – saw logs (together with veneer logs and peeler logs; 18.5 million m^3; an over 9% increase), and less than 2% – other wood for material processing (0.6 million m^3; however, in this case there was a less than 1% decrease in harvested amount). The downward trend in fuelwood harvesting continued (a more than 4% decrease; total amount harvested was 4.5 million m^3), for both softwood and hardwood. As in previous years, the State Forests was the main supplier of wood to domestic market (94% of supplies). Although, according to official data, in 2021 harvesting of wood from private forests increased 19% in relation to 2020, the amount of roundwood harvested from private forests was only 1.9 million m^3 in 2021.

In 2021 Poland imported 3.0 million m^3 of roundwood (an amount similar to that of the previous year) and it accounted for 7% of the volume harvested. Poland imported roundwood primarily from the European Union countries (98%, compared to 90% in the previous year), which was mainly due to the limitations on the export of unprocessed wood imposed by Belarus. 91% of imported wood was intended for production purposes (2.8 million m^3) and 84% of it was softwood. The import of tropical wood was insignificant and amounted to less than 2 thou. m^3. Similarly, fuelwood import was inconsequential and amounted to 0.3 million m^3 (94% of which was round softwood). On the other hand, Poland exported 4.2 million m^3 of wood, equalling 10% of the volume harvested and 91% of the amount exported in 2020). Primary export destination markets were those of the European Union (71%). As in the case of import, export was dominated by wood for material processing (96%) and softwood (83%). Fuelwood export amounted to less than 0.2 million m^3 (59% of which was hardwood).

Considering the persisting pandemic of Covid-19 and hard to predict development of war in Ukraine, including the consequences of the war-related EU sanctions imposed on Russia and Belarus, forecasts of development, including of the wood market, are burdened with relatively higher risk than previously. Due to the growing demand for wood shown by the industry, an increase in wood harvesting is assumed to continue till 2023 to approximately 46 million m^3 (however, the growth dynamics will decrease in subsequent years: 4% and 3%). As previously, more than 90% of harvested roundwood will be intended for material processing (41.5 million m^3 in 2023), and 80% of it will be round softwood. The trend of slow decrease in fuelwood harvesting should remain unchanged, for both softwood and hardwood. As regards foreign trade, in the years 2022-2023 a decrease in export dynamics of roundwood (4.3% and 1.5%, respectively) and an increase in import dynamics (3.2% and 3.7%, respectively) is expected. In 2023 wood export may amount to 4.4 million m^3 and its import to almost 3.3 million m^3. Considering the insignificance of fuelwood for foreign trade (in the years 2022-2023 the assumed import may amount to approximately 0.3 million m^3, and export should not exceed 0.2 million m^3), both export and import will be dominated by industrial wood (96% and 90%, respectively). The forecasted increase in wood import will relate to the need to change geographical composition of import, i.e. to cross out formerly important Russian and Belarusian markets from the supplier list.

One should also take into account the changes in EU forest policies. Increasing the role of passive protection of natural assets at the expense of the sustainable forest management, is very likely to cause the wood supply restraints on the market.

4. (B) **Wood energy, with a focus on government policies promoting wood energy**

In 2020 energy generated from renewable energy sources (RES) amounted to 10160 thou. toe in Poland and it was more than 7% higher than in the previous year. 65% was generated from biomass (to a large extent from wood biomass), and 13% from wind. Energy generated from RES accounted for 17.9% of total energy generation and 10.1% of energy consumption (a more than 2 percentage point and a more than 1 percentage point increase, respectively, compared to 2019). In 2021 approximately 30% (17 GW) of installed power of all electricity sources was renewable sources.

To achieve the set energy-climate goals, the regulatory environment is being changed in favour of renewable energy sources (inter alia, energy from wind (including offshore wind power plants) and atom, energy from RES in energy mix, and energy clusters). Within the department of the environment there has been established a *Team to increase the biomass share in the energy and heating system* (May 2022). The Team's goal is to assess the potential of and to identify the barriers and limitations to the development of this market, as well as to draw up recommendations as to how to overcome these obstacles (legislative and non-legislative actions concerning technical conditions, funding sources, origin and availability of biomass, and support systems). On the other hand, representatives of government administration and stakeholders of the biogas and biomethane sector have signed the *Agreement on cooperation for the development of the biogas and biomethane sector* in November 2021. This sector is crucial for the country to carry out the energy transition process. The document envisages the development of biogas and biomethane plants and support for the use of biogas and biomethane in the economy using the locally available raw material base.

4. (C) **Certified forest products**

Voluntary international certification schemes in the forestry-wood sector are quite widely popularized in Poland. State Forests, controlling 77% of forest area, carry out the multifunctional and sustainable forest management, in accordance with the stringent national law based on EU legislation and apply nature- and climate-friendly practices that have been developed in the 100-year history of the organisation. Consequently, this kind of marketing practices could develop on Polish market.

In Poland forests and wood products are certified under two systems –*Forest Stewardship Council* (FSC), which dominates as regards origin control in supply chains (CoC), and *Programme for the Endorsement of Forest Certification Schemes* (PEFC), which is primary as regards forest management (FM). Forest management certification under PEFC covers 7.2 million hectares of forests (as of June 2022), i.e. 78% of their total area in Poland, almost 7% of PEFC certified forests in Europe and more than 2% of so certified forests globally. On the other hand, 6.7 million hectares of forests is certified according to FSC rules (as of September 2022), i.e. 72% of forests in Poland, which means 12% of FSC certified forests in Europe and 3% globally. In Poland, there is 256 active CoC certificates in the PEFC system, which account for more than 2% of such certificates in Europe and for almost 2% globally, and 2546 FSC certificates, which account for more than 11% of such certificates in Europe and for almost 5% globally. In the case of both systems, most of CoC certificates is held by production companies (manufacturers of sawnwood, pallets, flooring materials, wood-based panels, cellulose and paper, paper products, and furniture). Vital changes in the certification schemes and introducing new, not always justified requirements, may influence the situation of certification in Poland.

4. (D) **Sawn softwood**

In 2021 4.6 million m^3 of sawn softwood (together with impregnated and non-impregnated ties) was produced in Poland, meaning an almost 9% increase compared to the previous year. Sawn softwood accounted for more than 90% of total sawnwood production. Poland also imported 1.2 million m^3 of this material (27% of the production volume). On the other hand, almost 21% of domestic production of sawn softwood was exported (1.0 million m^3). In 2021 both export and import volumes of this material were similar to the volumes of the previous year.

It is expected, that after a slowdown of sawn softwood production growth dynamics in 2022, in 2023 the production will be more than 1% higher than in 2021 and will reach a level of approximately 4.7 million m^3. On the other hand, forecasts of foreign trade envisage continuation of former trends, i.e. growth of both import (to 1.3 million m^3 in 2023, i.e. an almost 5% increase in relation to 2021) and export (to 1.1 million m^3, meaning an almost 9% increase). As previously, import should exceed export.

4. (E) **Sawn hardwood**

In 2021 sawn hardwood production (together with impregnated and non-impregnated ties) amounted to 0.5 million m^3 in Poland, and the volume was similar to that of the previous year. Sawn hardwood production accounted for 10% of total sawnwood production. To a large extent the domestic demand was also satisfied by sawn hardwood import (64% of the production volume), which amounted to 0.3 million m^3 (including 17 thou. m^3 of tropical sawn hardwood). Compared to the previous year, import of sawn hardwood increased 25%. On the other hand, in 2021 Poland exported 0.3 million m^3 of sawn hardwood (i.e. 59% of the production volume), i.e. 30% more than in 2020.

It is anticipated that in the period 2022-2023 sawn hardwood production will remain at a level of approximately 0.5 million m^3. As regards foreign trade, an increase in both import and export is expected (approximately 22% by 2023 in relation to 2021). In the period 2022-2023 sawn hardwood import should not exceed 0.4 million m^3 and export may amount to 0.3-0.4 million m^3.

4. (F) **Veneer sheets**

In 2021 veneer sheets production amounted to 46 thou. m^3 in Poland, meaning a 19% increase in relation to 2020. 61% of it was hardwood veneer. The high and growing demand resulted in veneer import (121 thou. m^3), which exceeded the production volume almost threefold in 2021 and was 63% higher than in the previous year. Approximately 45% of domestic veneer production (21 thou. m^3) was exported (meaning a 40% increase in relation to 2020).

It is anticipated that, due to the limited possibilities of harvesting wood assortments of required quality in Poland, domestic veneer production may demonstrate a downward trend in the next years (and amount to 42 and to 44 thou. m^3, respectively, in the years 2022-2023). Import will still be important for the domestic veneer market and may amount to 125-130 thou. m^3 in the years 2022-2023, while veneer export should not exceed 24 thou. m^3 in this period.

4. (G) **Wood-based panels**

In 2021 the wood-based panel market in Poland demonstrated a 14% increase in production compared to 2020. A total of 13.5 million m^3 were produced: ● particleboards 7.2 million m^3 (53% of all wood-based panels), i.e. 9% more than in the previous year (of which 12% were OSB boards (0.8 million m^3)), ● fibreboards 5.8 million m^3 (43% of the total produced boards, 21% more than the year before), ● plywood 0.5 million m^3, i.e. 12% more than in the previous year (4% of the total produced wood-based panels). The assortment structure of manufactured fibreboards was dominated by dry-process fibreboards (with a share of 62%; 3.5 million m^3; 11% more than in 2020), while the share of wet-process porous fibreboards was 37% (2.1 million m^3; 44% more than in the previous year). On the other hand, in the case of wet-process hardboards (76 thou. m^3) a further drop in production (16%) was observed. In 2021 Poland also imported wood-based panels in the amount of 3.9 million m^3 (25% more than in 2020), which accounted for 29% of the production volume. Particleboards accounted for approximately 61% of imported wood-based panels (2.4 million m^3, 29% more than in the previous year), fibreboards for 23% (0.9 million m^3, a 7% increase in relation to 2020), and plywood for 15% (0.6 million m^3, 45% more than the previous years' volume). OSBs accounted for 13% of particleboards imported to Poland, and dry-process fibreboards dominated fibreboard import (with an 81% share within total fibreboard import). More than 28% of domestic wood-based panel production was exported (3.8 million m^3, 10% more than in 2020). The assortment structure of export was dominated by fibreboards (with a share of 60%, 2.3 million m^3), most of which were wet-process porous fibreboards (1.1 million m^3) and dry-process fibreboards (0.8 million m^3). On the other hand, particleboard export amounted to 1.2 million m^3, of which 29% were OSBs. Poland also exported 0.4 million m^3 of plywood, i.e. 21% more than in the previous year.

It is assumed that in the coming years the market in wood-based panels will continue to grow and the production may increase to 13.9 million m^3 in 2023 (3% in relation to 2021). The growth, Total production volume was 13.5 million m^3, of which 7.2 million m^3 were particleboards (53% of all wood-based panels) – i.e. 9% more than in the previous year (including 0.8 million m^3 (12%) of OSBs), 5.8 million m^3 fibreboards (43% of total wood-based panel production and 21% more than in the previous year), and 0.5 million m^3 was plywood (together with furniture panels and similar layer panels) – i.e. 12% more than in the previous year (4% of total wood-based panel production) however, will mainly concern wet-process porous fibreboards (a 6% increase in 2023 in relation to 2021, 2.3 million m^3) and dry-process fibreboards (a more than 4% increase, 3.7 million m^3). No significant growth of the production of particleboards (up to 7.3 million m^3; apart from OSBs, in whose case the production growth may be more than 6% in the analysed period, i.e. to 0.9 million m^3) and plywood (1%, 0.6

million m^3) is anticipated. The scale of present and anticipated demand indicates that it is possible that wood-based panel import will continue to grow till 2023 (8% in relation to 2021), which means that it may reach 4.1 million m^3 in 2022 and 4.2 million m^3 in 2023, whereas the wood-based panel export dynamics may slow down (a 3% increase in 2023 in relation to 2021) and in the years 2022-2023 only 3.8 million m^3 and 3.9 million m^3, respectively, of Polish wood-based panels may be exported. The assortment structure of both exported and imported wood-based panels should not change significantly in the analysed years.

4. (H) Pulp and paper

In 2021 in Poland wood pulp production amounted to 1.7 million tonnes and it was a level similar to that of 2020. The production structure was dominated by cellulose with a share of 57% (1.0 million tonnes), followed by mechanical wood pulp and semi-chemical wood pulp with a 40% share (0.7 million tonnes) and cellulose pulp for chemical processing whose share was 3% (0.06 million tonnes). Polish wood pulp market is characterised by relatively high import (68% of the production volume) and lower export (10% of the production volume), which is especially noticeable in the case of cellulose (111% and 18%, respectively). In 2021 Poland imported 1.2 million tonnes of wood pulp (93% of which was cellulose), almost 4% more than in the previous year. The still relatively insignificant export (less than 0.2 million tonnes, almost 99% of which was cellulose) was yet approximately 11% higher than in the previous year.

It is assumed that in the period 2022-2023 wood pulp production will remain at a level of 1.7-1.8 million tonnes. Former trends in foreign trade should also continue, i.e. by 2023 wood pulp import may increase to 1.3 million tonnes (it will be then almost 5% higher than in 2021), while export will be probably 0.2 million tonnes (meaning a 19% increase compared to 2021).

Regarding paper and paperboard in Poland, in 2021 its production increased 4% in relation to the previous year and amounted to 5.3 million tonnes. Its assortment structure was dominated by packaging paper (a 70% share; 3.7 million tonnes; 4% increase in production compared to 2020). Approximately 15% was graphic paper (0.8 million tonnes, 5% more than in the previous year) and 11% household and sanitary paper (0.6 million tonnes; in this case a more than 1% production drop was observed). As in the case of wood pulp, foreign trade is of great importance for domestic market in paper and paperboard. In 2021 import equalled 98% of the production volume and export 48%, and these trends are growing stronger – in so far as export of paper and paperboard (2.6 million tonnes) was 3% higher than in 2020, its import (5.2 million tonnes) increased as much as 12%. Poland’s main imports was packaging paper (72%, 3.8 million tonnes) and graphic paper (24%, 1.3 million tonnes). The exported goods also consisted of packaging paper (76%, 1.9 million tonnes) and graphic paper (22%, 0.6 million tonnes).

It is forecasted that in the years 2022-2023 paper and paperboard production will grow to 5.5-5.6 million tonnes (a more than 4% production increase in 2023 compared to 2021). The outlook for foreign trade in paper and paperboard expects an increase in both import (to 5.4 million tonnes) and export (to 2.8 million tonnes).

4. (I) Value-added wood products

In Poland wood products of relatively high added value encompass primarily furniture, builder’s carpentry and joinery products, wooden packaging, and paper products.

In 2021 Polish production of furniture amounted to PLN 49.5 billion ($ 12.8 billion, € 10.8 billion), 71% of which was wooden furniture (PLN 35.2 billion, $ 9.1 billion, € 7.7 billion). This meant a 15% production growth year-to-year in fixed prices. The assortment structure of wooden furniture was dominated by furniture for sitting (32%) and furniture for dining rooms and living rooms (22%), followed by furniture elements with a more than 10% share. Approximately 92% of manufactured wooden furniture (in terms of value; in current prices – 21% more than in the previous year) was exported (PLN 32.3 billion, $ 8.4 billion, € 7.1 billion) and it encompassed primarily furniture for sitting (36%; almost all of it was upholstered furniture) and furniture for dining rooms and living rooms (17%). On the other hand, Poland imported wooden furniture of the value of PLN 4 billion ($ 1 billion, € 0.9 billion), which was 11% in relation to the production. This was considerable growth of import compared to 2020, i.e. more than 39% in current prices. Furniture for sitting (with a 19% share) and furniture for dining rooms and living rooms (with a 17% share) was important part of the import and export alike.

In 2021 production of builder’s carpentry and joinery products (including prefabricated wooden houses) was 9% higher, in real terms, than in 2020 (PLN 10.8 billion, $ 2.8 billion, € 2.4 billion). Among other products, 10% more of wooden windows and doors (20.2 million m^2) and 3% more of wooden floor panels (62.5 million m^2; excluding mosaic (1.7 million m^2; a downward trend in its production has been observed for few years and in 2021 the production was 16% lower than in 2020)) was manufactured. Almost 70% (in terms of value) of domestic production of builder’s carpentry and joinery products was exported (PLN 7.5 billion, $ 1.9 billion, € 1.7 billion), which meant 29% higher export than the year before (in current prices). Wooden windows accounted for 36% of the value structure of export and wooden doors for 20%. The higher growth dynamics was characteristic of the import of builder’s carpentry and joinery products, which was 42% higher than in the previous year (in terms of value; in current prices) and amounted to PLN 1.1 billion ($ 0.3 billion, € 0.2 billion), which meant that it was more than 10% in relation to the production. Poland imported, inter alia, windows (16% of the import value of this group of value-added products) and joined multi-layer floor panels (not intended for mosaic floors) – 28%.

High growth dynamics was observed in wood packaging production in 2021 in Poland. In terms of value, it was 55% higher, in real terms, than in 2020 and equalled PLN 4.2 billion ($ 1.1 billion, € 0.9 billion). Production of pallets (flat and box) increased 19% (to 150.1 million pcs.) and of cable reels 20% (45.7 thou. tonnes), while production of various types of crates, boxes, cages, and similar wooden packaging decreased (-23%) (64 thou. tonnes). Foreign trade in wooden packaging demonstrated a considerable increase in turnover, i.e. 63% in the case of export and 70% in the case of import (in current prices), while export accounted for 94% of the production value (PLN 4 billion, $ 1 billion, € 0.9 billion) and import for 14% (PLN 0.6 billion, $ 0.2 billion, € 0.1 billion). Pallets (flat and box) dominated both export and import, and their share was approximately 90% (in terms of value) for export as well as for import.

In 2021 production of paper products in Poland was higher than the year before (almost 16% in real terms) and, in terms of value, amounted to PLN 35.1 billion ($ 9.1 billion, € 7.7 billion). Its assortment structure was dominated by corrugated paper and paperboard and packaging made of it (with a 65% share within total production of paper products) and toilet and sanitary articles for households (23%). Foreign trade is a very important factor for the domestic market in paper products. 39% of domestic production (in terms of value) was exported (PLN 13.5 billion, $ 3.5 billion, € 3 billion), which meant almost 17% more than in the previous year (in current prices), while import of value-added paper products accounted for 20% of the production value (PLN 6.9 billion, $ 1.8 billion, € 1.5 billion) and was 15% higher in relation to 2020 (in current prices). The two main groups of paper products in foreign trade encompassed packaging made of paper and paperboard (cartons, boxes etc.) and special coated paper with the shares of 42% and 20%, respectively, of the export value and of 41% and 17%, respectively, of the import value.

4. (J) **Housing and construction**

In Poland the condition of the construction industry, including housing, is of importance for the development of the domestic wood sector, for the construction industry is an eminent generator of the demand for wood materials and products (construction wood materials and and wood products for interior fittings). In 2021 the gross added value of construction increased 1.3% in real terms (while the growth in industry was more than 14%; however, in the previous year it dropped 7.8%) and average employment 0.9% – to 670 thou. people (compared to 0.4% in the previous year). The dynamics of construction and assembly production (a 5.8% increase) was higher than in 2020 (a 1.3% decrease), while the increase was the highest in the case of specialist construction works (a 7.5% increase). In H1 of 2022 the situation in construction still may be regarded as relatively well (an approximately 12% increase in construction and assembly production compared to a corresponding period of the previous year, including an almost 25% increase in entities that erect buildings). The estimated use of production capacity in construction is 83% (1 percentage point higher than in mid-2021). Nevertheless, the symptoms of economic slowdown are already visible in this sector as well. The assessments of general economic condition become more and more negative. Regarding the coming months, construction companies fear a drop in orders (on domestic and foreign markets) and an increase in operating costs. The following are considered the main barriers to business: the growing costs of services, materials and raw materials (including energy); the growing costs of labour; and the uncertainty of general economic situation (also connected with the possible results of the war in Ukraine, such as disturbed supply chains and loss of employees from Ukraine).

In 2021 a relatively well economic situation was also maintained housing. Almost 235 thou. of dwellings were completed (6.3% more than in the previous year), and 871 thou. of dwellings were under construction (a 5.2% increase compared to the previous year). The number of dwellings with issued construction permits also increased (23.5%), and so did the number of dwellings whose construction had been commenced (23.9%). Nonetheless, the results for H1 of 2022 evidence that the situation in Polish housing has clearly worsened (the increase in the number of dwellings completed was only 3.8% and in the number of dwellings under construction 1.6% compared to half-year of 2021). The most disturbing is the significant decrease in the number of dwellings whose construction has been commenced (more than 17%) and in the number of dwellings with issued construction permits (less than 1%). These are important factors, for there is still a considerable quantitative and qualitative deficit of dwellings in Poland, especially regarding low-rent dwellings. The current problem is not only the lack of dwellings, but also the increase in their prices, while the society's wealth is still at a relatively low level. Hence, the importance of initiatives to remedy the situation, such as the envisaged regulations allowing for changes of the manner of use of certain non-residential buildings (conversion into residential buildings). These regulations are to concern office buildings and commercial buildings – housing estates are to be created on the premises occupied by these structures.

Table 1

Economic indicators

Indicator	2016	2017	2018	2019	2020	2021
	% change on previous year (in real terms)					
Gross Domestic Product	103.1	104.8	105.4	104.7	97.8	105.9
Sold production of industry	103.6	106.2	105.4	105.1	98.1	114.4
Construction and assembly production	97.6	110.9	114.7	104.8	98.7	105.8
Dwellings completed	110.6	109.2	103.8	112.1	106.5	106.3
Dwellings under construction	101.5	103.8	104.9	103.8	100.4	105.2
Average paid employment						
- total	103.1	102.9	101.9	101.8	98.9	101.4
- in the enterprises sector	102.8	104,5	103.5	102.7	98.9	100.3
Registered unemployment rate (*at the end of the year*)[1]	8.2	6.6	5.8	5.2	6.3	5.4
Average monthly gross real wages and salaries						
- total	104.3	103.7	105.4	104.8	102.9	103.0
- in the enterprises sector	104.4	103.9	105.4	104.1	101.5	103.4
Price indices of consumer goods and services (*inflation*)	99.4	102.0	101.6	102.3	103.4	105.1
Investment outlays	88.8	106.5	115.4	103.1	95.0	101.0
Trade						
billion of PLN, current prices						
Exports	803.5	882.6	951.3	1023.6	1062.5	1316.0
Imports	786.5	880.1	970.8	1018.5	1015.4	1323.0
Balance of trade	+17.0	+2.5	-19.5	+5.1	+47.1	-7.0
billion of USD, current prices						
Exports	205.1	231.6	264.8	267.1	272.6	342.0
Imports	200.7	231.0	270.2	265.8	260.6	343.5
Balance of trade	+4.4	+0.6	-5.4	+1.3	+12.0	-1.5
billion of EUR, current prices						
Exports	184.8	206.7	223.6	238.2	239.9	288.1
Imports	180.9	206.1	228.2	237.0	229.4	289.6
Balance of trade	+3.9	+0.6	-4.6	+1.2	+10.5	-1.5

[1] as a ratio of registered unemployed persons to the economically active civil population

POL
Production
Imports
Exports

UNECE

TF1

TIMBER FORECAST QUESTIONNAIRE
Roundwood

Note: Complete only if data for 2021 have been revised.

Country: Poland **Date:** 3.10.2022
Name of Official responsible for reply:
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Product Code	Product	Unit	Historical data 2 020	Historical data 2 021	Revised 2 021	Estimate 2 022	Forecast 2 023
1.2.1.C	SAWLOGS AND VENEER LOGS, CONIFEROUS						
	Removals	1000 m^3 ub	14 166,568	15 590,000	15 697,881	16 370	16 900
	Imports	1000 m^3 ub	1 227,366	250,000 #	1 089,982	1 150	1 200
	Exports	1000 m^3 ub	1 708,900	1 800,000 #	1 919,666	2 050	2 100
	Apparent consumption	1000 m^3 ub	13 685,034	14 040,000	14 868,197	15 470	16 000
1.2.1.NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS						
	Removals	1000 m^3 ub	2 746,574	2 832,000	2 810,057	2 930	3 050
	Imports	1000 m^3 ub		80,000 R#			
	Exports	1000 m^3 ub		150,000 R#			
	Apparent consumption	1000 m^3 ub		2 762,000			
1.2.1.NC.T	of which, tropical logs						
	Imports	1000 m^3 ub	1,558	1,000 #	1,717	2	2
	Exports	1000 m^3 ub	0,163	0,000 #	0,244	0	0
	Net Trade	1000 m^3 ub	1,395	1,000	1,473	2	2
1.2.2.C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS						
	Removals	1000 m^3 ub	13 870,434	14 870,000	14 861,115	15 570	15 900
	Imports	1000 m^3 ub	1 185,002	700,000 #	1 173,927	1 200	1 250
	Exports	1000 m^3 ub	2 034,959	2 200,000 #	1 329,165	1 300	1 250
	Apparent consumption	1000 m^3 ub	13 020,477	13 370,000	14 705,877	15 470	15 900
1.2.2.NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS						
	Removals	1000 m^3 ub	4 464,159	4 625,000	4 610,003	4 840	5 100
	Imports	1000 m^3 ub		560,000 R#			
	Exports	1000 m^3 ub		75,000 R#			
	Apparent consumption	1000 m^3 ub		5 110,000			
3	WOOD CHIPS, PARTICLES AND RESIDUES						
	Domestic supply	1000 m^3	9 680,239 N	10 000,000 C	10 210,869	10 500	10 800
	Imports	1000 m^3	2 864,157	2 527,000 C	2 212,766	2 050	2 000
	Exports	1000 m^3	567,221	522,000 C	469,362	420	400
	Apparent consumption	1000 m^3	11 977,175	12 005,000	11 954,273	12 130	12 400
1.2.3.C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS						
	Removals	1000 m^3 ub	572,094 N	540,000	571,518	560,000	550,000
1.2.3.NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS						
	Removals	1000 m^3 ub	39,647 N	41,000	36,245	30,000	30,000
1.1.C	WOOD FUEL, CONIFEROUS						
	Removals	1000 m^3 ub	2 297,226 N	2 179,000	2 189,028	2 150,000	2 100,000
1.1.NC	WOOD FUEL, NON-CONIFEROUS						
	Removals	1000 m^3 ub	2 416,078 N	2 333,000	2 330,320	2 300,000	2 250,000

Please return by e-mail no later than 03 October 2022.

By e-mail to stats.timber@un.org.
Questions? Please contact Subashini Narasimhan at the above address.

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These data are flagged with E, R, N or C for secretariat estimate, repeat, national estimate or calculated totals (from subitems). If there is no flag, this indicates officially supplied data.

N - National estimate

The trade turnover is based on data that includes the estimated value of trade turnover by entities exempt from the reporting obligation. These trade turnover figures are estimated at 3%.

red colour - corrected data

Roundwood: sawlogs and veneer logs and pulpwood and wood fuel - with removals from tress and shrubs outside the forest, including forest chips, with stump
Roundwood removals underbark
Residues - production excluding recovered wood

UNECE

Note: Complete only if data for 2021 have been revised.

TF2

TIMBER FORECAST QUESTIONNAIRE
Forest products

Country: Poland		Date: 3.10.2022
Name of Official responsible for reply:		
Gabriela Bidzińska, Ewa Leszczyszyn		
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Product Code	Product	Unit	Historical data 2 020	Historical data 2 021	Revised 2 021	Estimate 2 022	Forecast 2 023
6.C	SAWNWOOD, CONIFEROUS						
	Production	1000 m^3	4 221,169	4 300,000	4 582,684	4 500	4 650
	Imports	1000 m^3	1 236,692	1 141,617	1 239,066	1 250	1 300
	Exports	1000 m^3	957,688	1 040,888	964,500	1 000	1 050
	Apparent consumption	1000 m^3	4 500,173	4 400,729	4 857,250	4 750	4 900
6.NC	SAWNWOOD, NON-CONIFEROUS						
	Production	1000 m^3	486,046	470,000	486,414	460	510
	Imports	1000 m^3	249,866	300,332	311,897	350	380
	Exports	1000 m^3	220,611	312,435	286,391	310	350
	Apparent consumption	1000 m^3	515,301	457,897	511,920	500	540
6.NC.T	of which, tropical sawnwood						
	Production	1000 m^3	2,698	2,700	0,000	1	1
	Imports	1000 m^3	17,055	19,922	16,800	17	18
	Exports	1000 m^3	4,789	3,761	3,227	3	3
	Apparent consumption	1000 m^3	14,964	18,861	13,573	15	16
7	VENEER SHEETS						
	Production	1000 m^3	38,894	40,000 C	46,340	42	44
	Imports	1000 m^3	74,074	91,581 C	120,633	125	130
	Exports	1000 m^3	14,881	18,598 C	20,895	22	24
	Apparent consumption	1000 m^3	98,087	112,983	146,078	145	150
7.NC.T	of which, tropical veneer sheets						
	Production	1000 m^3	0,331	1,000	1,000	1	1
	Imports	1000 m^3	0,188	0,209	0,238	0	0
	Exports	1000 m^3	0,274	0,181	0,259	0	0
	Apparent consumption	1000 m^3	0,245	1,028	0,979	1	1
8.1	PLYWOOD						
	Production	1000 m^3	482,953	490,000 C	542,855	540	550
	Imports	1000 m^3	415,230	464,478 C	604,005	620	650
	Exports	1000 m^3	308,620	349,658 C	373,976	390	410
	Apparent consumption	1000 m^3	589,563	604,820	772,884	770	790
8.1.NC.T	of which, tropical plywood						
	Production	1000 m^3	2,367	3,000	2,358	3	3
	Imports	1000 m^3	2,673	3,930	5,821	6	7
	Exports	1000 m^3	0,582	0,690	1,216	1	1
	Apparent consumption	1000 m^3	4,458	6,240	6,963	8	9
8.2	PARTICLE BOARD (including OSB)						
	Production	1000 m^3	6 571,164	7 100,000	7 159,879	7 200	7 250
	Imports	1000 m^3	1 871,856	2 341,906	2 408,518	2 500	2 600
	Exports	1000 m^3	1 137,125	1 149,682	1 165,058	1 200	1 250
	Apparent consumption	1000 m^3	7 305,895	8 292,224	8 403,339	8 500	8 600
8.2.1	of which, OSB						
	Production	1000 m^3	832,614	1 050,000	826,887	830	880
	Imports	1000 m^3	245,655	366,421	315,997	350	380
	Exports	1000 m^3	412,740	418,600	340,623	380	400
	Apparent consumption	1000 m^3	665,529	997,821	802,261	800	860
8.3	FIBREBOARD						
	Production	1000 m^3	4 752,949	5 060,000 C	5 750,236	5 850,0	6 050,0
	Imports	1000 m^3	851,432	888,338 C	911,909	970,0	990,0
	Exports	1000 m^3	2 018,935	2 340,344 C	2 264,238	2 170,0	2 270,0
	Apparent consumption	1000 m^3	3 585,446	3 607,994	4 397,907	4 650,0	4 770,0
8.3.1	Hardboard						
	Production	1000 m^3	90,684	110,000	76,231	100	100
	Imports	1000 m^3	150,558	13,151	139,030	180	180
	Exports	1000 m^3	398,434	44,229	427,478	270	270
	Apparent consumption	1000 m^3	-157,192	78,921	-212,217	10	10
8.3.2	MDF/HDF (Medium density/high density)						
	Production	1000 m^3	3 177,657	3 350,000	3 541,568	3 600	3 700
	Imports	1000 m^3	684,295	846,374	743,197	760	780
	Exports	1000 m^3	652,805	1 189,479	751,853	800	850
	Apparent consumption	1000 m^3	3 209,147	3 006,896	3 532,912	3 560	3 630
8.3.3	Other fibreboard						
	Production	1000 m^3	1 484,608	1 600,000	2 132,437	2 150	2 250
	Imports	1000 m^3	16,579	28,813	29,682	30	30
	Exports	1000 m^3	967,696	1 106,636	1 084,907	1 100	1 150
	Apparent consumption	1000 m^3	533,491	522,177	1 077,212	1 080	1 130
9	WOOD PULP						
	Production	1000 m.t.	1 716,539	1 745,000 C	1 749,182	1 720	1 750
	Imports	1000 m.t.	1 152,142	1 143,589 C	1 194,429	1 220	1 250
	Exports	1000 m.t.	159,426	194,216 C	176,658	190	210
	Apparent consumption	1000 m.t.	2 709,255	2 694,373	2 766,953	2 750	2 790
12	PAPER & PAPERBOARD						
	Production	1000 m.t.	5 128,862	5 373,000 C	5 323,938	5 450	5 550
	Imports	1000 m.t.	4 677,252	5 158,350 C	5 233,203	5 300	5 400
	Exports	1000 m.t.	2 473,949	2 594,881 C	2 555,558	2 650	2 800
	Apparent consumption	1000 m.t.	7 332,165	7 936,469	8 001,583	8 100	8 150
5.1	WOOD PELLETS						
	Production	1000 m.t.	1 572,763	1 080,000	1 593,880	1 620	1 680
	Imports	1000 m.t.	176,289	197,931	269,127	280	300
	Exports	1000 m.t.	710,984	476,829	694,170	680	650
	Apparent consumption	1000 m.t.	1 038,068	801,102	1 168,837	1 220	1 330

od 2012: estimated - 60% of production

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N - National estimate

Sawnwood - with sleepers (impregnated and non-impregnated)

The trade turnover is based on data that includes the estimated value of trade turnover by entities exempt from the reporting obligation. These trade turnover figures are estimated at 3%.

Plywood (product code 8.1) - no bamboo plywood

Wood pulp (product code 9) is reported in metric tonnes (no air-dry weight)

Wood pulp - excluding pulp from fibres other than wood and excluding pulp from recovwered fibre pulp

red colour - corrected data