

**THE NETHERLANDS
NATIONAL MARKET REPORT 2024**

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Institute for Forestry, Forest Products and Services, Probos
Ministry of Agriculture, Fisheries, Food Security and Nature
Ministry of Infrastructure and Water Management
Netherlands' Timber Trade Association, Royal VVNH
Netherlands' Paper and Board Association, Royal VNP

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1. General economic trends affecting the forest industries sector

General outlook

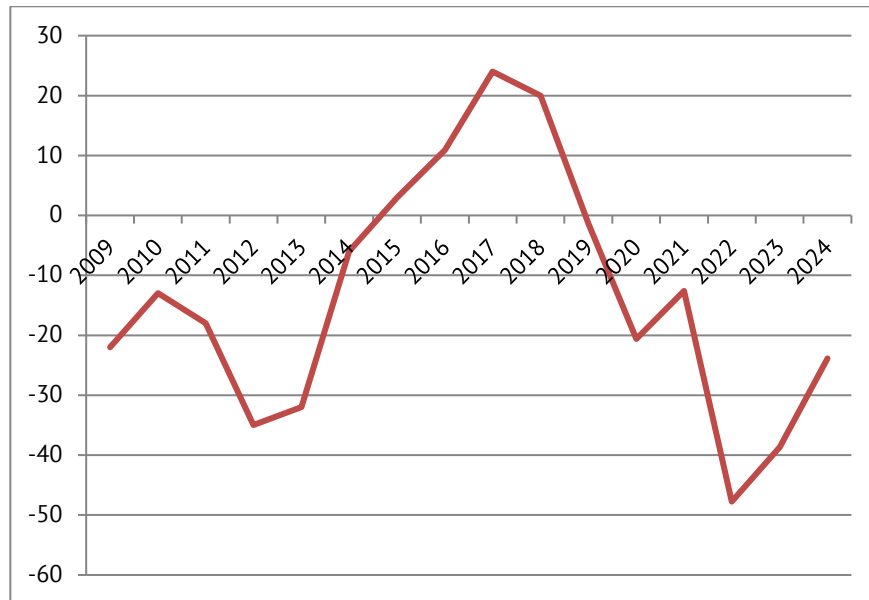
The year 2023 has been significantly different from 2022 in economic terms. The Dutch economy cooled down considerably, resulting in a GDP growth of 0.1%. This is due to inflation weighting on private consumption and the weak external environment, which held back exports. Whereas the economy was still benefiting from the post-pandemic recovery in 2022, this year the economic impact of Russia's invasion of Ukraine is more evident. The majority of the economic growth in 2023 can be attributed to government consumption. In 2024, growth is forecast to pick up to 0.6%, supported by an increase in wage growth and expansion in government consumption and public investment.

In 2023, inflation steeply went down to 4.1% from 11.6% in 2022 and is expected to further decline in subsequent years. This decline can be partly attributed to a decrease in energy prices, which benefited from the energy price cap set by the government. This development coexisted with a rise in purchasing power from -2.5% in 2022 to -0.6% in 2023.

After the labour market became very tight shortly after the coronavirus recession, unemployment rate remains stable at 3.5% and 3.6% in 2022 and 2023, respectively. It is expected to increase marginally, to 3.9% in 2025. Wage growth showed a delayed increase as a result of increased inflation, which resulted in a historically low purchasing power in 2022. However, wage growth increased substantially to 6.2% in 2023 and is forecast to remain high in the coming years.

Consumer confidence is recovering

Consumer confidence is an indicator of consumers' faith and expectations in the Dutch economy. It is however largely influenced by the general world economy. As is shown in figure 1, consumer confidence in the Netherlands increased sharply since 2013, stabilised between 2017 and 2018 and then shows a large drop in 2019 as a consequence of the COVID-19 outbreak, stretching into 2020. However, over the first seven months of 2021 consumer confidence increased again by 9 points. To a great extent this recovery may be attributed to the high vaccination rate in the Netherlands and consequently the gradual ease of related limitations. Unfortunately consumer confidence dropped in 2022. The all-time low (-48) was reached in September and October 2022. This is according to CBS 2022 the lowest level since measurement began in 1986. From November 2022 onwards, consumer confidence started to recover steeply, averaging at -24 in 2024. The reduced inflation rates, among others, probably plays a role in this.



(Source: CBS statline edited by Probos)

Figure 1

Consumer confidence trend in the period from 2009 to the first eight months of 2024

Housing market

Traditionally, the housing industry is important for the softwood industry. The demand for housing remains high and house prices rose steeply until mid-2022. This was mainly driven by low interest rates combined with generous mortgage loan standards, which allowed people to borrow money cheaply. After mid-2022 housing prices started to decrease for some time, but this trend reversed from mid-2023 onwards. A similar but opposite trend was apparent in the mortgage rates, which have been decreasing since mid-2023. Construction output grew by 1.5% in 2023. Construction output of new non-residential buildings increased moderately by 2%, while residential construction shrank by 7%. The short-term prospects of the construction sector are clearly less favourable compared to previous years; construction of new buildings, both residential and non-residential, are expected to decrease sharply with 11% and 10%, respectively. Production with regards to renovation and maintenance will be insufficient to compensate for this reduced output. However, medium-term prospects seem more positive, as the total production between 2026-2028 is expected to increase with 2.5% per year on average.

2. Policy measures influencing timber trade and marketing

Sustainable procurement policy

In the view of the Dutch government, public procurement of sustainably produced timber is very important to give timber producing countries a clear signal regarding consumers' willingness to purchase sustainably produced products at reasonable prices and thus increase such purchases. It also sets an example for semi-governmental organisations and the private sector to introduce sustainably produced timber in their procurement criteria and by doing so, contribute to sustainable forest management.

In June 2008 the Dutch national government established its sustainable procurement policy. By implementing this policy the government intended to increase the use of sustainably produced products. Therefore all governmental organisations must use sustainability as an important criterion when purchasing goods. This way the Dutch

government intends to stimulate the market for sustainable products and promote innovation within companies. Clear goals were set. As of 2010 the Dutch government has the ambition that all timber procured by central government should come from a sustainable source.

Part of the sustainable procurement policy is a set of criteria for sustainably produced timber, the Dutch Procurement Criteria for Timber. Based on these criteria the government can assess whether the offered timber is produced sustainably. The Timber Procurement Assessment Committee (TPAC) is responsible for the assessment of certification systems for sustainable forest management according to the Timber Procurement Assessment System (TPAS). TPAC advises the Dutch Ministry of Infrastructure and Water Management. The minister decides on the final acceptance. Information on the TPAS criteria and the TPAC judgements can be found on the TPAC website (www.tpac.smk.nl).

The website www.inkoopduurzaamhout.nl has been set up to support procurers and suppliers in their efforts to procure or supply sustainably produced timber.

EU Deforestation Regulation

On 29 June 2023 the Regulation on deforestation free products was adopted in the EU. This regulation will enter into force on 29 December 2024 and will replace the EU Timber Regulation. Under the EU Timber Regulation, the Dutch Competent Authority, the NVWA, carried out about 30-40 inspections in 2020 and the first half of 2021. For 2022, 70 inspections were planned. However, only seventeen were conducted due to staff changes. Of the seventeen inspected companies, seven were found to be compliant, while 10 companies were non-compliant with the law. The Deforestation Regulation requires additional transparency and due diligence from timber traders and other operators in the timber value chain. NGOs have announced that they will request stringent enforcement of the regulation as soon as it enters into force.

Sustainable Energy Agreement

Burning woody biomass such as pellets has been a hot political issue for some time, as Parliament has expressed concerns regarding the clear cut of large areas of forests for burning. People living in the vicinity of small biomass-based power plants have protested the air pollution caused by these.

In the Climate Agreement, it was decided to draw up a sustainability framework for all types of bio-based raw materials. The first version of this framework was presented in October 2020; the most recent letter with updates is from December 2023. For more information, see “Sustainability framework for bio-based raw materials”. The aim of the sustainability framework is to phase out low-value applications of bio-based raw materials (e.g. energy applications) and to focus on more high-value applications (e.g., chemicals and construction).

At the moment, the revised Renewable Energy Directive (REDIII) is being transposed into national legislation. For the sustainability framework the goal is to follow as much as possible the European system of sustainability assurance of biogas feedstock (RED), as has been communicated with parliament in May 2023.

Climate agreement

In 2019 the National Climate Agreement was presented by the coalition and cabinet. The aim of this agreement is a reduction in CO₂ emissions of at least 49% by 2030 compared to 1990. The underlying aim is compliance with the Paris Climate Agreement, in other words a maximum 2-degree temperature increase compared to 1990, and preferably 1.5 degrees.

The Climate Agreement contains a package of measures which has broad societal support, with the active support of stakeholders. The agreement was established through meetings of authorities, companies and interest groups at five so-called climate tables. The five tables are: Electricity, Built Environment, Industry, Agriculture & Land Use, and Mobility. At each table a package of measures was formulated and agreements between parties were concluded which together comprise the contribution of each of the five sectors to achieve the climate objective.

The forestry- and timber sector is covered by the sector table Agriculture & Land Use. A specific sub-table titled 'trees, forests and nature' is dedicated to the optimization of the contribution of forest and nature (including the timber- and other related sectors) to reach the climate mitigation goals. The goals are afforestation, revitalisation of existing forests, agroforestry and landscape restoration, and carbon storage in biomaterials, including wood. The main framework for the implementation of the Climate Agreement for forests and timber is the National Forest Strategy.

In 2021 the EU adopted a new binding goal of at least 55% reduction in CO₂ emission reduction by 2030, which is a 6% increase from the Dutch Climate Agreement. In July 2021 the European Commission presented the Fit-for-55 package with proposals to deliver on this goal. The EU Forest Strategy is part of this package and aims to protect and restore EU forests and their vital role in tackling climate change and biodiversity loss. Part of the EU Forest Strategy is the pledge to plant 3 billion trees by 2030. This translates to approximately 11,000 hectares of forest in the Netherlands, which is in line with the National Forest Strategy (which aims for 37,400 hectares).

National Forest Strategy

In 2020 the Dutch minister of Agriculture, Nature and Food Quality together with the provinces presented a National Forest Strategy. This strategy has been developed in close cooperation with stakeholders such as decentralized government and forest managers (public and private). The national forest strategy will be executed through 12 provincial plans. These plans will feed into the National Rural Area Program (NPLG – *Nationaal Programma Landelijk Gebied*), which aims to translate goals of climate, nature, water and reducing nitrogen deposition to the local level. For this, around €24 billion has been made available.. The national forest strategy is part of this programme and covers four main topics/issues:

1. More forest

The aim is to increase the Dutch forest area by 10% by 2030, an increase of approximately 37,400 hectares of forest.

2. Vital forests

To improve the quality of forests, it is important to improve environmental factors, to give a quality boost to forests and to adjust the management in certain areas in order to increase the resilience of forests against the backdrop of a changing climate. This requires action in various policy areas and programmes. For example, the reduction in nitrogen deposition, which is

envisaged in the government's nitrogen approach, is crucial for the vitality of many forests. This is achieved through the nitrogen policy that will be further developed in the coming years.

3. Trees outside forests

By supporting the partners in the Delta Plan Biodiversity Recovery the aim is to increase the area of trees outside the forest to 10% in rural areas and to aim for 25.000 hectares of agroforestry and 1.000 hectares of food forests by 2030.

4. Sustainable use of trees and forest

The strategy aims to increase the sustainable use of the forests for recreational and educational purposes and to increase the percentage of Dutch timber used in long-lasting products.

Netherlands Circular in 2050

The outcome of latest Dutch government climate change and wider environmental policy decisions could provide an enhanced market opportunity for wood. The Netherlands' aim is to create a truly 'circular economy' in 2050, with an emphasis on using products and materials that can be re-used, recycled and ultimately disposed of in an environmentally sound way. To this end the government submitted the policy paper 'Netherlands Circular in 2050' to the House of Representatives in 2016. In the follow up of this policy ambition the National Agreement on the Circular Economy has been signed by more than 300 businesses and social partners like NGOs. At the beginning of 2019 the Dutch Cabinet presented the implementation program for the circular economy. At the beginning of 2023 an update was sent to the House of Representatives: 'National Circular Economy Programme 2023-2030'. This implementation program presents concrete measures, actions and projects for prioritised product chains: consumer goods, plastics, construction and manufacturing.

Sustainability framework for bio-based raw materials

Bio-based raw materials, including wood, play an increasingly important role in the transition towards a circular and climate-neutral economy. This is the case for bio-based raw materials for material applications such as the building industry as well as raw material in chemicals and the use of residual flows for energy applications.

The Dutch government has sent a Letter to Parliament in October 2020 with the Sustainability Framework. The government is convinced that the use of biomass is essential in the transition to a climate-neutral and circular economy by 2030 and 2050. However, only sustainable biomass can contribute to this transition, and sustainable raw materials must ultimately be used for the highest-value applications possible. These are applications with lower carbon emissions than processes using fossil fuels, which contribute to the transition to a circular economy and have a positive effect on employment and the economy. This gives rise to the following categories:

1. Low-value applications are applications that do not comply with this desired end state. Alternatives are available, or will become available in the near future, and policy must be focused on phasing out.
2. Bridging applications dovetail with the transition perspective, and policy on them should focus on conversion.
3. High-value applications are the desired end state, and policy on them should focus on phasing in

Sustainable use of bio-based raw materials requires that the materials themselves are sustainably produced – in other words, without negative effects on the environment

(availability of water, biodiversity, emissions, soil quality and carbon stocks) or the social circumstances of the local population, and with respect for the rights of workers (people, planet, profit). The government has developed sustainability criteria for all bio-based raw material flows and applications, insofar as they are promoted or regulated. These are sent to Parliament in June 2021.

A key document on which this sustainability framework is based is the advisory report by the Social and Economic Council of the Netherlands (SER) entitled 'Biomass in the Balance'. The report draws on many sources, including analyses by the Netherlands Environmental Assessment Agency (PBL) of the availability and uses of biomass and an independent report on sustainability criteria.

The new criteria are scheduled to come into effect halfway through 2025 at the earliest and will apply to biomass used for energy, (chemical) feedstock and materials. The new sustainability criteria will not yet apply to food, feed, paper and textile.

3 Developments in Dutch forest products markets sectors

a) Wood raw materials

Removals of roundwood, chips and shreds from the Dutch forests and other wooded area's in 2023 are estimated to be approximately 2,795,000 m³ under bark in total. A decrease of 6% compared to 2022.

Industrial roundwood has a share of app. 21% (app. 595.000 m³ under bark) within the total removals. The rest of the removals mainly consist of wood fuel as logs or chips and shreds, including those from landscape care wood and municipal waste streams.

The share of export within the total removals of industrial roundwood in the Netherlands was 40% in 2023. The export of pulp- and fibrewood has a share of almost 80% in the total exports of industrial roundwood.

b) Wood energy

The share of renewable energy in the Netherlands in 2023 was approximately 17%. This is an increase compared to 2022 when the share of renewable energy was 15%, according to the statistics Netherlands (CBS)¹. Approximately 34% of the renewable energy comes from use of biomass, 31% from wind energy and 24% from solar energy. Based on the current trend and the expected future developments the Dutch National Climate and Energy Outlook 2020 expects that the renewable energy share will be 25% in 2030².

In 2023 54 billion kWh electricity is produced from wind-, water- and solarpower and biomass, which means around 47% of the total electricity use. In 2022 this percentage was 40%. Electricity production from biomass however showed a decrease of 14%.

Approximately 4.5 million ton dry matter of woody biomass is estimated to be used for the production of energy and heat in the Netherlands. Due to the increase in the use of energy pellets in the past years the share of imports substantially increased within the total consumption of wood for energy production.

1 <https://www.cbs.nl/nl-nl/longread/rapportages/2024/hernieuwbare-energie-in-nederland-2023>

2 <https://www.pbl.nl/sites/default/files/downloads/pbl-2020-netherlands-climate-and-energy-outlook-2020-summary-4299.pdf>

c) Certified forest products

The market share of certified primary timber products (sawn wood and wood-based panels) on the Dutch market in 2017 was 84.7%, which corresponds to a volume of 5.1 million m³ roundwood equivalents under bark. This concerns primary timber and timber products (sawnwood and wood based panels) that meet the Dutch Procurement Criteria for Timber. Differences between the product groups are large. While sawn softwood and wood-based panels have a market share of respectively 84.8% and 92.5%, sawn tropical hardwood (67.1%) and sawn temperate hardwood (37.8%) are lagging behind. A new survey of certified primary timber products is conducted concerning the year 2023 and results are expected in the end of this year.

Results from an internal monitoring system³ of the Netherlands Timber Trade Association for the year 2023 indicates growth over the last years. In 2022 and 2023 the growth is stabilizing at a very high level within the product group of sawn softwood and panels. Tropical sawnwood showed a minor increase in 2023 compared to 2022.

³ Thémis - <https://timbermarketsurvey.com/login>

d) Sawn softwood

After a period of decreasing imports and consumption since 2007 (see figure 2), the sawn softwood market in the Netherlands recovered in 2015 and this recovery continued until 2019. After a small decrease in 2019, the recovery continued in 2020 and 2021. In 2022 and 2023 the imports of sawn softwood seem so stabilize.

In 2023 imports of sawn softwood increased by 1,5% while exports increased with 39% compared to 2022. This resulted in a moderate decrease in apparent consumption. For the first time, planed sawn wood has a higher import volume than rough sawn wood. Planed sawn wood represents approximately 60% of the import volume, where rough sawn softwood has a share of roughly 40% of the total softwood import (Table 2). Stocks are expected to remain at a low level.

Table 1
Key facts of the Dutch sawn softwood market x 1000 m³

Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Domestic Production	137	159	163	129	126	110	82	90	95	110	115	113
Imports	2.151	2.138	2210	2433	2477	2615	2827	2760	2818	3032	2659	2701
Exports	327	359	411	456	393	428	512	602	509	391	515	550
Apparent Consumption	1.961	1.938	1.962	2.106	2.210	2.297	2.397	2.248	2.404	2.750	2.259	2264

Sources: Statistics Netherlands (CBS) / Netherlands Timber Trade Association (Royal VVNH)/ Probos

Table 2
Sawn softwood imports (volume in m³)

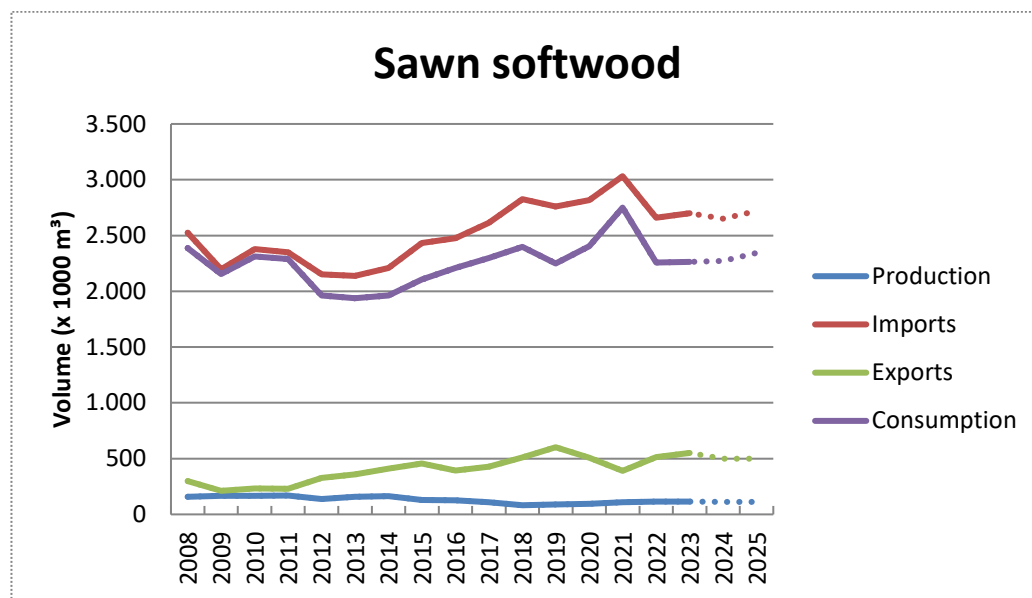
Countries	2022				2023				Sawn	Planed	Total
	Sawn	Planed	Total	%	Sawn	Planed	Total	%			
1 Sweden	337.509	423.347	760.856	32%	235.883	693.998	929.881	34%	-30%	64%	22%
2 Germany	413.185	179.139	592.324	25%	280.659	379.285	659.944	24%	-32%	112%	11%
3 Finland	167.156	65.197	232.353	10%	116.188	139.153	255.341	9%	-30%	113%	10%
4 Belgium	68.729	24.408	93.137	4%	59.928	107.728	167.656	6%	-13%	341%	80%
5 New-Zealand	60.905	143	61.048	3%	106.343	3.911	110.254	4%	75%	2627%	81%
6 Latvia	59.971	38.831	98.802	4%	46.627	56.775	103.402	4%	-22%	46%	5%
7 Poland	40.735	10.814	51.549	2%	24.640	52.725	77.365	3%	-40%	388%	50%
8 Estonia	25.971	33.010	58.981	3%	20.769	50.289	71.058	3%	-20%	52%	20%
9 Ukraine	46.862	1.300	48.162	2%	57.288	649	57.937	2%	22%	-50%	20%
1 France	3.518	14.417	17.935	1%	10.526	30.951	41.477	2%	199%	115%	131%
0 Other	363.245	280.482	643.727	24%	108.015	118.384	226.399	8%	-70%	-58%	-65%
Total	1.587.786	1.071.087	2.658.873		1.066.866	1.633.848	2.700.714		-33%	53%	2%

* Other (2023): This group consists of 38 countries with exports to the Netherlands of less than 39,000 m³ (Source: CBS trade statistics edited by Probos and international trade statistics of Sweden, Germany, Finland and Latvia for verification)

With the uncertainty regarding the 2023 data in mind, the top 10 countries for softwood import in the Netherlands experience quite some changes compared to 2022 (table 2). Most notable are the absence of Russia and Belarus due to the import ban because of the ongoing war in Ukraine. In 2022 their combined exports to the Netherlands were still estimated to be approximately 350.00 m³. In 2023 this decreased to 0.

Sweden and Germany remain by far the foremost suppliers of softwood timber to the Netherlands. In general the imports increased slightly. This is reflected in the individual imports of almost all countries. The total import of sawn softwood in the Netherlands increased by 1,5% in 2023 compared to 2022. This is mainly caused by an increase of imports of planed sawnwood (53%).

⁴ Since 2024 the format of the input-data (t-1) to analyse international timber trade data for the Netherlands has changed due to legal circumstances. This resulted in a less detailed format of the input data, which makes exact comparison to historical trade data difficult. A sensitivity analysis specifically for sawn softwood pointed out that 2023 trade data might represent an overestimation of up to 22% compared to 2022 for certain productcodes.



(Source: CBS trade statistics edited by Probos, Probos roundwood survey and NTTA estimates and forecasts)

Figure 2

Development of production, import, export and consumption of sawn softwood in the Netherlands in the period 2008-2023 and expectations for 2024 and 2025.

e) Sawn hardwood (temperate and tropical)

The packaging industry represents the largest market for temperate wood, with poplar being the primary material used. Other industries, including civil engineering and infrastructure, carpentry, and furniture and interior design, play a significant role in the import and utilisation of temperate hardwood⁵.

The imports of temperate hardwoods increased significantly (-27%) in 2023 compared to 2022, recovering from a heavy decrease in the previous year. With app. 150.000 m³, the import is still lower than the average in recent years (2017-2021). The war in Ukraine and import bans from Russia and Belarus most likely affects the supply of temperate hardwood. Furthermore the general economic trends and high inflation also play its parts.

The market for temperate hardwoods is expected to benefit from the recovery of the construction sector and the housing market from 2023 onwards. However, this is still surrounded by major uncertainties due to several factors, including nitrogen deposition. As interior products and furniture are bought at the end of the construction cycle, there is a delay compared to tropical timber used in construction. European oak is by far the most popular species within the temperate hardwoods. There is a huge demand for European oak, with almost daily price increases. Due to constraints in the availability supply might limit market developments.

The primary markets for imported tropical hardwood have been civil engineering and infrastructure, the carpentry sector, and the construction industry. The DIY and garden sector represents the next largest market.

⁵ Oldenburger, J., & De Groot, C. (2015). *Afzetmarkten voor gezaagd hout en plaatmateriaal op de Nederlandse markt in 2013*. Stichting Probos.

Imports of tropical hardwood decreased since 2018, however in 2022 an unexpected increase in imports was reported. This increase seems to be fully caused by one product: unassembled profiled board for hardwood floors. In 2023 the imports decreased slightly, but still remain at higher levels than in 2021 and 2020. The DIY and gardening sector significantly benefitted from the fact that people - due to the COVID measures - were limited in commuting and travelling and thus spent more time at home and in their gardens. The negative impact of COVID-19 regarding imports and delays in shipments and high freight costs seems to have alleviated and hence the Dutch market for (tropical) hardwoods is positive about the medium term market development. The productivity within the construction sector is recovering and shows a growing trend. This led to more demand as well.

The share of further processed/optimized tropical sawnwood keeps increasing in the Dutch joinery industry resulting in more demand for timber from Asian producing countries, but the share of African timber species within these imports are increasing. Demand is shifting from Meranti, traditionally the species most used in the Dutch joinery industry, to Mahogany.

Timber might also benefit from the increased environmental awareness among consumers and architects. Although competition with other building materials is still heavy, timber seems to recover market share, E.g. in renovation, where now and then PVC plastic is replaced by timber. Increasingly new Life Cycle Analyses studies are published⁶. Innovations like CLT help strengthen the position of timber as well.

Table 3
Key facts of the Dutch sawn hardwood market x 1000 m³

Year	2012	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Domestic Production	53	59	66	56	58	60	58	51	54	38	34	32
of which tropical	7	5	11	7	6	6	7	6	6	8	7	7
Imports	276	231	201	224	230	273	385	305	268	271	314	322
of which tropical	194	172	148	156	136	125	218	152	141	136	142	172
Apparent Consumption	329	290	267	280	288	333	443	356	322	309	266	261
of which tropical	201	177	159	163	142	131	225	158	141	143	176	136

Sources: Probos, Statistics Netherlands (CBS)

Following a decline in the residential construction industry in 2020 due to the impact of the global pandemic, the consequences of nitrogen emissions and PFAS-contaminated soil, and the economic situation and conflict in Ukraine from 2021 onwards, the outlook for 2024 and beyond is for a further decrease. However, the medium-term outlook is for average growth of 2.5% per annum, spread across the residential construction industry, civil engineering and infrastructure. The call for sustainability in these sectors is also a key driver of growth⁷.

f) Pulp and paper

The turnover within the Dutch paper and board industry decreased by 35% between 2022 and 2023 to EUR 1,738 million. In the previous year this was +32%. So the market for paper and paperboard shows clear swings in turnover, returning to levels of 2018-2019. This is also reflected by the decrease of the total paper production by 23%.

The paper and board industry in the Netherlands is one of the leading sectors in recycling and energy reduction. This is due to the large collection of waste paper by consumers and the biobased production process. Export accounted for 75% of the total production. Germany remains by far the most important export country (31%), followed by Belgium (12%), France (11%) and the UK (8%).

⁶ <http://www.europeanstc.com/environment/>

⁷ <https://www.eib.nl/publicaties/verwachtingen-bouwproductie-en-werkgelegenheid-2024/>

Paper and board producing factories in the Netherlands almost solely produce paper and board from recovered paper and/or imported pulp. From the total of 21 factories in the Netherlands there is only one factory that is producing mechanical wood pulp for the production of board for folding boxes. The species used are Poplar and Norway spruce.

In 2017 76.7% of the imported market pulp was certified sustainably (FSC or PEFC) sourced. A slight increase compared to 2015. A new market survey is being conducted and results are expected in the end of the year.

Table 4*Fibre furnish of the Dutch paper and board industry*

	X 1,000 m ³ round wood equivalents under bark										
Year	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Cellulose	2,496	2,611	2,275	2,377	2,181	2,083	2024	1867	2024	1862	941
Recovered paper	7,170	7,179	7,254	7,426	8,561	8,541	8379	8453	8632	8174	6903
Total fibre input	9,666	9,790	9,529	9,803	10,741	10,624	10,402	10,320	10,656	10,036	7,844

Source: Probos and Royal VNP

In 2023 the total number of employees in the paper and board industry showed a slight decrease; from 3,799 to 3,697 employees. The number of employees in the industry in the Netherlands decreased by over 30% since 2005.

Table 5*Recent developments of the Dutch paper and board industries*

	2013	2014	2015	2016	2017	2018	2019	2020	2021	2022	2023
Change in production in %:											
Thermo-mechanical pulp (integrated)	3,1	8	0%	2,3%	2,3%	0,0%	0,0%	0,0%	0,0%	0,0%	0,0%
Graphic papers	-0,4	0	4%	-2,6%	-3,3%	-5,7%	-8,3%	-	-0,0%	1,5%	-37%
Packaging papers	3,5	0	1%	4,3%	30,1%	2,8%	-0,6%	2,5%	3,9%	0,5%	-20%
Case materials	3,5	0	1%	4,3%	30,1%	2,8%	C	C	C	C	C
Other packaging paper and board	3,3	2	4%	0,9%	4,8%	0,3%	C	C	C	C	C
Sanitary & household	0	-6	-3	-	0,0%	-	-	-0,0%	-11,3%	-0,5%	-4%
Total paper & board	1,1	-1	-4	1,1%	11,7%	-	-2,9%	-0,9%	2,7%	0,5%	-23%
(Turnover [million Euro])	1,786	1,809	1,737	1,693	1,859	1,956	1,813	1,656	2,024	2,678	2,222
Price change of production of paper and board industries	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,	n,a,

Source: Royal VNP C = confidential

h) Wood pellets

The production of wood pellets was approximately 231,000 m.t. in 2023, compared to over 268.00 m.t. in 2022. Approximately half of this quantity is exported. The imports of wood pellets have increased substantially in 2021 due to the fact that the utilities further increased co-firing of wood pellets. In 2021 almost 2.7 million tons of wood pellets were imported by the Netherlands. In 2022 this amount stabilised. In 2023 this amount decreased to approximately 2.2 million tons.

4. Gender and human rights issues related to the forest market sector

According to Statistics Netherlands, approximately 20.000 individuals are employed in forestry and the timber industry in 2023, of which 17.000 are estimated to be men.

At the State forest Service, 1.406 individuals are employed, with a ratio of 65% men and 35% woman⁸.

In 2022 the corrected wages between woman and men was -6.9% in the private sector and -1.8% in the public sector (figure 3). However there is a decreasing trend in the past years in this difference.

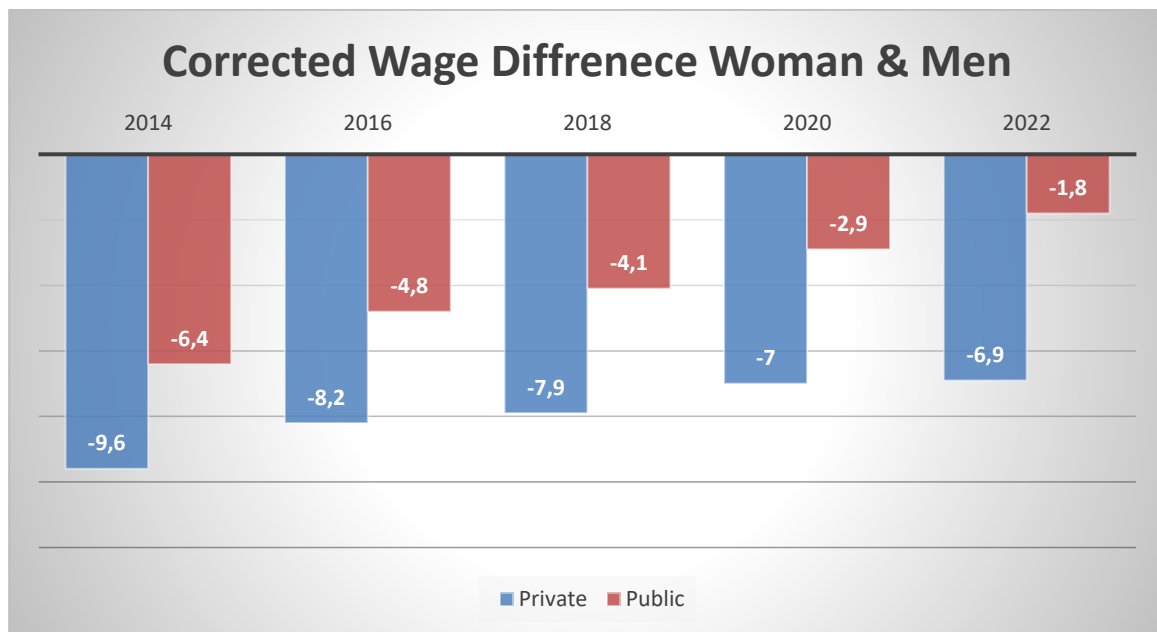


Figure 3⁹
Corrected wages between woman and men, 2014-2022

However the above mentioned differences do not specifically apply to the forest market sector, but are general data on the overall labour market.

Data specifically for the forestry market sector are not available. However table 6 shows the number of jobs (and division between part-time and full-time), hourly rate, monthly salary and the average workweek for men and woman working in the sector of agriculture, forestry and fisheries combined. However, do note that these are general averages and hence uncorrected numbers. This means that for instance the level of education or function has not been incorporated in the comparison between men and woman.

⁸ <https://www.staatsbosbeheer.nl/over-staatsbosbeheer/feiten-en-cijfers>

⁹ <https://www.cbs.nl/nl-nl/longread/aanvullende-statistische-diensten/2023/monitor-loonverschillen-mannen-en-vrouwen-2022/2-loonverschillen-tussen-mannen-en-vrouwen>

Table 6

Average hourly rate and monthly salary of men and woman in the Agriculture, Forestry and Fisheries sector

<i>Employment</i>	<i>Year</i>	Jobs	Hourly Wage	Monthly Wage (incl. overtime)	Workweek (incl. overtime)	Jobs	Hourly Wage	Monthly Wage (incl. overtime)	Workweek (incl. overtime)
		<i>x1,000</i>	<i>Euro</i>	<i>Euro</i>	<i>Hour</i>	<i>x1,000</i>	<i>Euro</i>	<i>Euro</i>	<i>Hour</i>
Part-Time	2019	27	14,02	824	15,3	27	15,65	1015	17
	2020	28	14,81	916	16,2	27	16,33	1073	17,3
	2021	28	15,19	919	15,7	28	16,4	1073	17,1
	2022	27	15,95	976	15,9	27	17,21	1152	17,5
	2023	26	17,91	1152	16,8	26	18,79	1282	17,9
Full-Time	2019	45	18,91	3039	41,7	11	13,86	2248	42,1
	2020	45	19,6	3134	41,7	12	14,53	2343	42
	2021	46	19,62	3174	41,8	12	14,61	2382	42,1
	2022	45	20,56	3327	41,8	12	15,45	2531	42,3
	2023	44	21,95	3535	41,8	13	16,87	2752	42,3
Total	2019	72	18,02	2203	31,7	38	14,74	1377	24,4
	2020	73	18,67	2293	32	39	15,42	1450	24,6
	2021	74	18,78	2311	31,8	40	15,48	1467	24,6
	2022	72	19,71	2453	32,2	39	16,28	1586	25,3
	2023	70	21,17	2646	32,5	39	17,77	1760	25,8

5. Tables

A, Economic indicators for the Netherlands

Change in %, unless otherwise specified	2020	2021	2022	2023	2024	2025
GDP	-3.9	6,2	5.0	0.1	0.6	1.6
Private consumption	-6.4	4,3	6,9	0,8	0.7	2.8
Exports of goods and services	-4.3	8,8	19.1	-0.9	1.0	1.7
Imports of goods and services	-4.8	10,0	22.1	-3.4	-0.7	1.4
Consumer Price Index (inflation)	1.1	2.8	11.6	4,1	3,5	2.8
Labour share in enterprise income (in level %)	76.3	72,9	67.8	67.6	68.6	68.9
Active labour force	0.0	0,9	2,4	2.0	1.0	0.6
Unemployment level, % of labour force ¹	4.9	4.2	3,5	3,6	3.7	3.9
EMU-debt level (ultimo year, in % GDP)	54.7	51,7	48.3	45.1	45.3	46.9
EMU-balance level (in % GDP)	-3.7	-2,3	-0,1	-0.4	-2.2	-2.6

Source: CPB (Netherlands Bureau for Economic Policy Analysis)

¹ According to the international definition

B, Forest products production and trade in 2023, 2024 and 2025

Product Code	Product	Unit	Estimate			Forecast		
			2023	2024	2025	2023	2024	2025
1,2,1,C	SAWLOGS AND VENEER LOGS, CONIFEROUS							
	Removals	1000 m ³	162	160	160			
	Imports	1000 m ³	73	70	70			
	Exports	1000 m ³	83	80	75			
	Apparent consumption	1000 m ³	151	150	145			
1,2,1,NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS							
	Removals	1000 m ³	42	45	45			
	Imports	1000 m ³	50	55	60			
	Exports	1000 m ³	51	50	50			
	Apparent consumption	1000 m ³	41	50	55			
1,2,1,NC,T	of which, tropical logs							
	Imports	1000 m ³	11	10	10			
	Exports	1000 m ³	2	3	3			
	Net Trade	1000 m ³	9	7	7			
1,2,2,C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS							
	Removals	1000 m ³	234	230	230			
	Imports	1000 m ³	78	80	80			
	Exports	1000 m ³	150	155	155			
	Apparent consumption	1000 m ³	163	155	155			
1,2,2,NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS							
	Removals	1000 m ³	114	115	115			
	Imports	1000 m ³	18	20	20			
	Exports	1000 m ³	73	75	80			
	Apparent consumption	1000 m ³	59	60	55			
3 + 4	WOOD RESIDUES, CHIPS AND PARTICLES							
	Domestic supply	1000 m ³	915	915	915			
	Imports	1000 m ³	225	225	225			
	Exports	1000 m ³	295	295	295			
	Apparent consumption	1000 m ³	845	845	845			
1,2,3,C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS							
	Removals	1000 m ³	32	32	32			
1,2,3,NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS							
	Removals	1000 m ³	9	9	9			
1,1,C	WOOD FUEL, CONIFEROUS							
	Removals	1000 m ³	402	400	385			
1,1,NC	WOOD FUEL, NON-CONIFEROUS							
	Removals	1000 m ³	1.798	1.800	1.800			

6,C	SAWNWOOD, CONIFEROUS		2023	2024	2025
	Production	1000 m ³	113	113	113
	Imports	1000 m ³	2.701	2.650	2.720
	Exports	1000 m ³	550	500	500
	Apparent consumption	1000 m ³	2.264	2.273	2.343
6,NC	SAWNWOOD, NON-CONIFEROUS				
	Production	1000 m ³	32	32	32
	Imports	1000 m ³	322	338	355
	Exports	1000 m ³	93	93	98
	Apparent consumption	1000 m ³	229	277	289
6,NC,T	of which, tropical sawnwood				
	Production	1000 m ³	7	7	7
	Imports	1000 m ³	172	155	163
	Exports	1000 m ³	43	30	21
	Apparent consumption	1000 m ³	136	132	149
7	VENEER SHEETS				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	19	20	20
	Exports	1000 m ³	5	5	5
	Apparent consumption	1000 m ³	14	15	15
7,NC,T	of which, tropical veneer sheets				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	1	1,4	1,4
	Exports	1000 m ³	1	0,6	0,6
	Apparent consumption	1000 m ³	1	0,8	0,8
8,1	PLYWOOD				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	513	520	525
	Exports	1000 m ³	98	100	105
	Apparent consumption	1000 m ³	415	420	420
8,1,NC,T	of which, tropical plywood				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	123	120	125
	Exports	1000 m ³	46	45	45
	Apparent consumption	1000 m ³	77	75	80
8,2	PARTICLE BOARD (including OSB)				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	1.038	950	900
	Exports	1000 m ³	166	150	150
	Apparent consumption	1000 m ³	872	800	750

8,2,1	of which, OSB		2023	2024	2025
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	344	325	310
	Exports	1000 m ³	109	100	90
	Apparent consumption	1000 m ³	234	225	220
8,3	FIBREBOARD				
	Production	1000 m ³	29	29	29
	Imports	1000 m ³	630	630	630
	Exports	1000 m ³	187	187	187
	Apparent consumption	1000 m ³	472	472	472
8,3,1	Hardboard				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	100	95	95
	Exports	1000 m ³	23	20	20
	Apparent consumption	1000 m ³	77	75	75
8.3.2	MDF (Medium density)				
	Production	1000 m ³	0	0	0
	Imports	1000 m ³	442	440	440
	Exports	1000 m ³	148	150	150
	Apparent consumption	1000 m ³	294	290	290
8.3.3	Other fibreboard				
	Production	1000 m ³	29	29	29
	Imports	1000 m ³	88	90	95
	Exports	1000 m ³	16	17	20
	Apparent consumption	1000 m ³	101	102	104
9	WOOD PULP				
	Production	1000 m,t,	37	37	37
	Imports	1000 m,t,	1.819	1.819	1.819
	Exports	1000 m,t,	1.635	1.635	1.635
	Apparent consumption	1000 m,t,	221	221	221
12	PAPER & PAPERBOARD				
	Production	1000 m,t,	2.222	2.222	2.222
	Imports	1000 m,t,	2.320	2.320	2.320
	Exports	1000 m,t,	2.076	2.076	2.076
	Apparent consumption	1000 m,t,	2.466	2.466	2.466
5,1	WOOD PELLETS				
	Production	1000 m,t,	231	231	231
	Imports	1000 m,t,	2.174	2.174	2.174
	Exports	1000 m,t,	232	232	232
	Apparent consumption	1000 m,t,	2.173	2.173	2.173