

# Laubholzmarkt

## Blick über die Landesgrenzen



FORESTS



Schweizerischer Forsverein - Debatte  
Laubholz: Angebot ohne Nachfrage  
11 Mai 2017, Zollikofen



# Outline

FORESTS



- UNECE
- Resources
- Production
- Trade
- Prices
- Market
- Outlook

# Economic Commission for Europe

## FORESTS



- ... is a multilateral platform which facilitates greater economic integration and cooperation among its fifty-six member States
- ... promotes sustainable development and economic prosperity through:
  - policy dialogue,
  - negotiation of international legal instruments,
  - development of regulations and norms,
  - exchange and application of best practices as well as economic and technical expertise,
  - technical cooperation for countries with economies in transition.
  - data and statistics

# The UNECE Region

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# Forestry and Timber Section

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WA1

- data, monitoring and assessment

WA2

- policy dialogue and advice

WA3

- communication and outreach

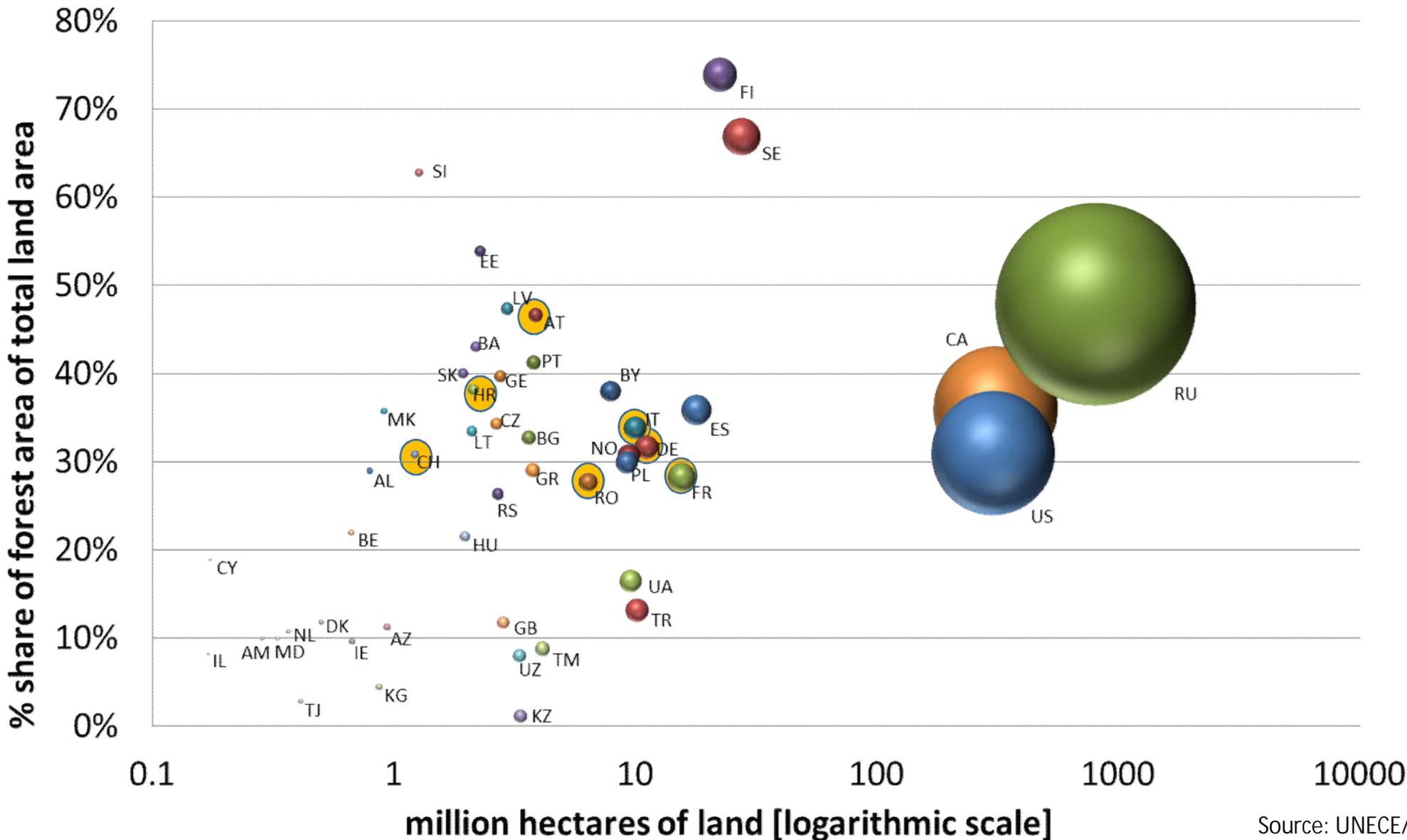
WA4

- capacity building

# Extent of forests - UNECE

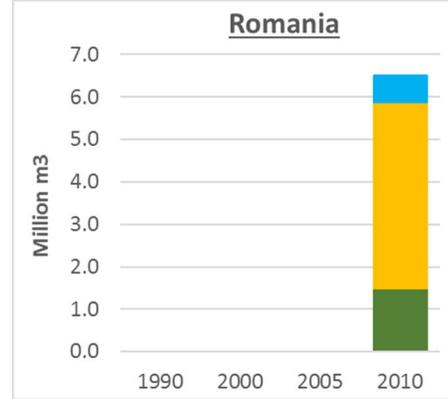
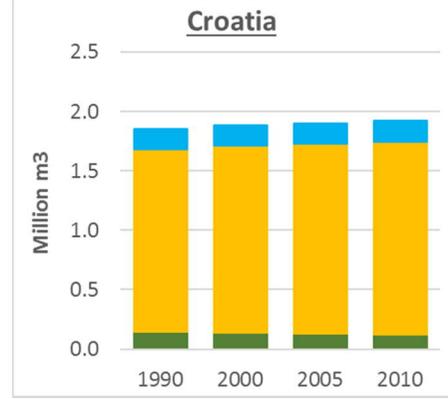
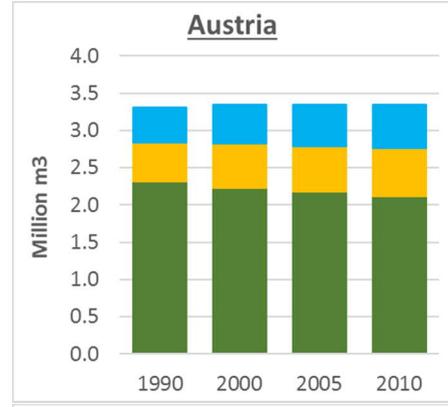
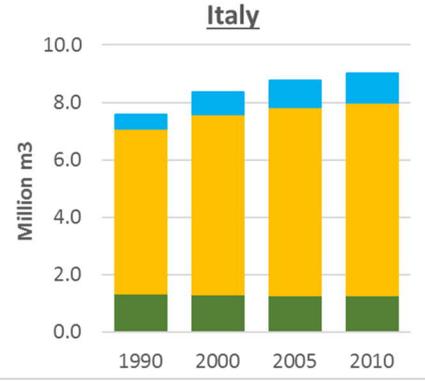
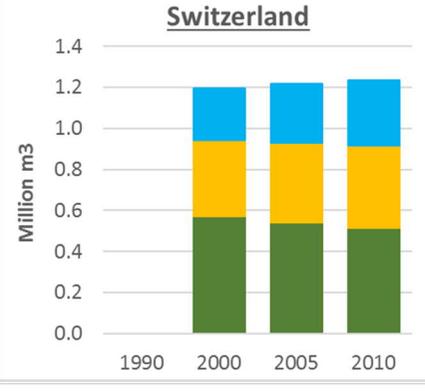
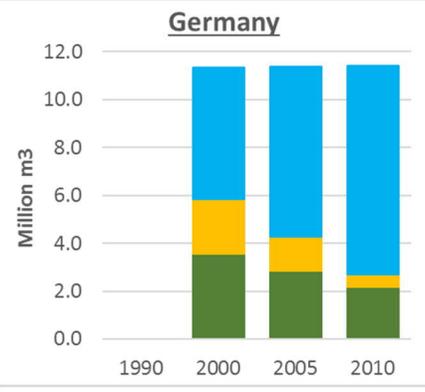
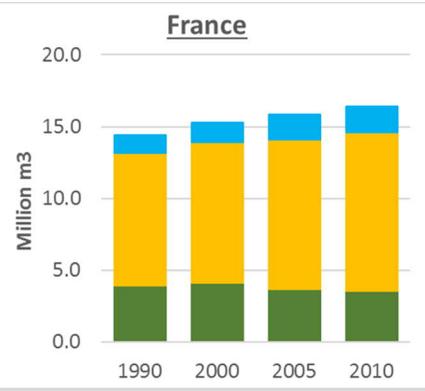
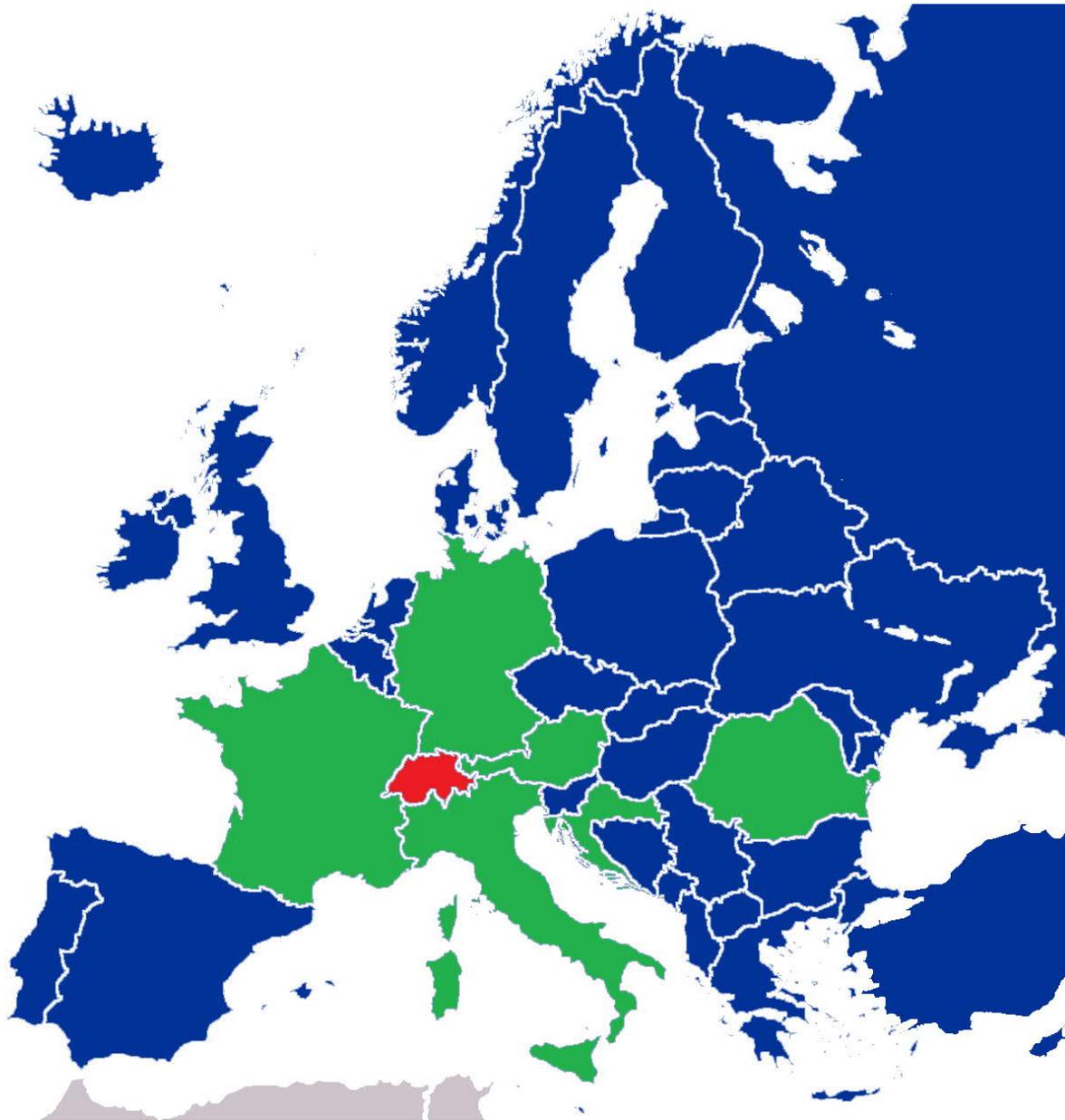


## FORESTS



Source: UNECE/FAO

# Forest composition



- Mixed forest
- Predominantly broadleaved forest
- Predominantly coniferous forest

Source: [http://w3.unece.org/PXWeb2015/p\\_xweb/en/STAT/STAT\\_26-TMSTAT1](http://w3.unece.org/PXWeb2015/p_xweb/en/STAT/STAT_26-TMSTAT1)

# Hardwood production & export

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Country	Industrial roundwood, non-coniferous					Sawnwood, non-coniferous all				
	Production [1,000 m <sup>3</sup> ]	Global rank	Export [1,000 m <sup>3</sup> ]	Global rank	Export [%]	Production [1,000 m <sup>3</sup> ]	Global rank	Export [1,000 m <sup>3</sup> ]	Global rank	Export [%]
France	8,629	15	2,205	3	25.6%	1,347	13	424	8	31.5%
Germany	8,379	17	1,118	6	13.3%	1,032	8	691	6	67.0%
Romania	5,631	25	96	32	1.7%	1,700	7	806	5	47.4%
Croatia	2,634	39	276	14	10.5%	1,221	6	902	4	73.8%
Austria	999	68	97	31	9.7%	126	31	143	19	113.5%
Italy	756	78	42	43	5.5%	550	25	193	17	35.1%
Switzerland	410	95	200	16	48.9%	69	69	15	50	22.0%

Source: UNECE/FAO

Exporter  
ALL COUNTRIES

Importer  
ALL COUNTRIES

Commodity  
LOGS, BEECH (FAGUS SPECIES)

Year  
2015

Units

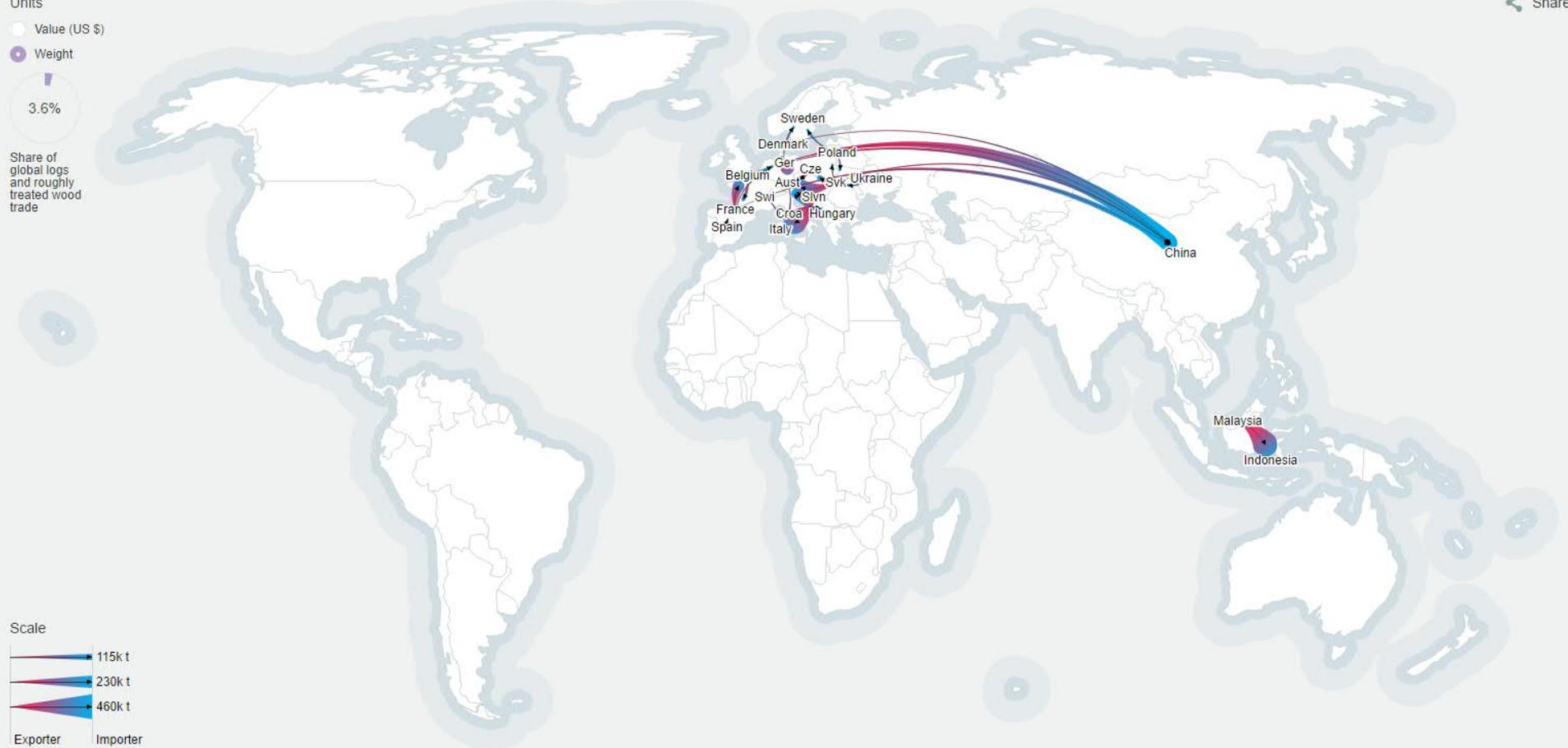
Value (US \$)

Weight

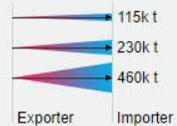


Share of global logs and roughly treated wood trade

Share

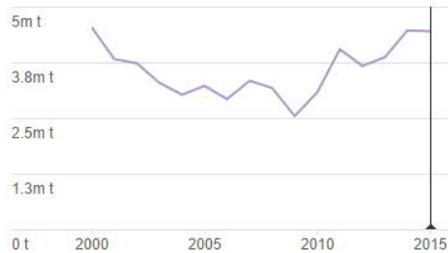


Scale



Total weight

4.4m t



Trade flows Commodities Exporters Importers Footprints

Displaying 27 of 402 flows [Download full query](#)

TOP 5

1	Malaysia to Indonesia	458k t
2	Slovenia to Italy	410k t
3	Germany to China	327k t
4	Slovakia to Austria	289k t
5	Germany to Austria	255k t

FASTEST GROWING

	2010-2015
1 Spain to France	+322%
2 Belgium to France	+121%
3 Montenegro to Albania	+110%
4 Germany to Switzerland	+51%
5 Slovakia to Czech Republic	+42%

FASTEST DECLINING

	2010-2015
1 Croatia to Bosnia Herzegovina	-41%
2 Bosnia Herzegovina to Italy	-38%
3 Bulgaria to Greece	-36%
4 Slovakia to Italy	-35%
5 Switzerland to Austria	-32%

Exporter  
ALL COUNTRIES

Importer  
ALL COUNTRIES

Commodity  
LUMBER, BEECH (FAGUS SPECIES)

Year  
2015

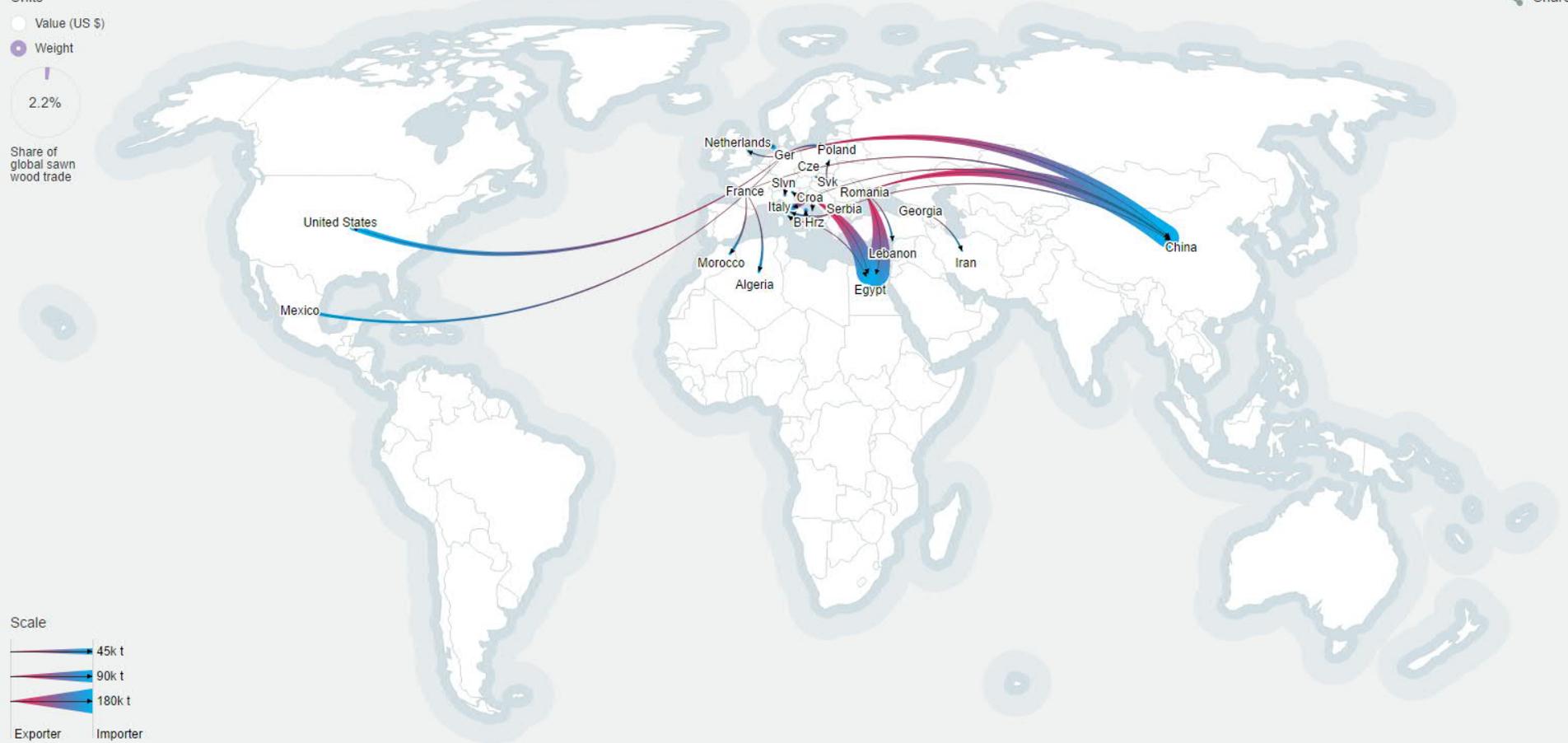
Units

- Value (US \$)
- Weight

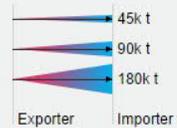


Share of global sawn wood trade

Share

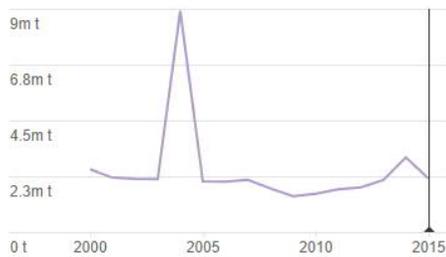


Scale



Total weight

1.8m t



Trade flows Commodities Exporters Importers Footprints

Displaying 26 of 1,031 flows [Download full query](#)

TOP 5

1	Romania to Egypt	190k t
2	Croatia to Egypt	160k t
3	Romania to China	160k t
4	Germany to China	111k t
5	Croatia to Italy	47.9k t

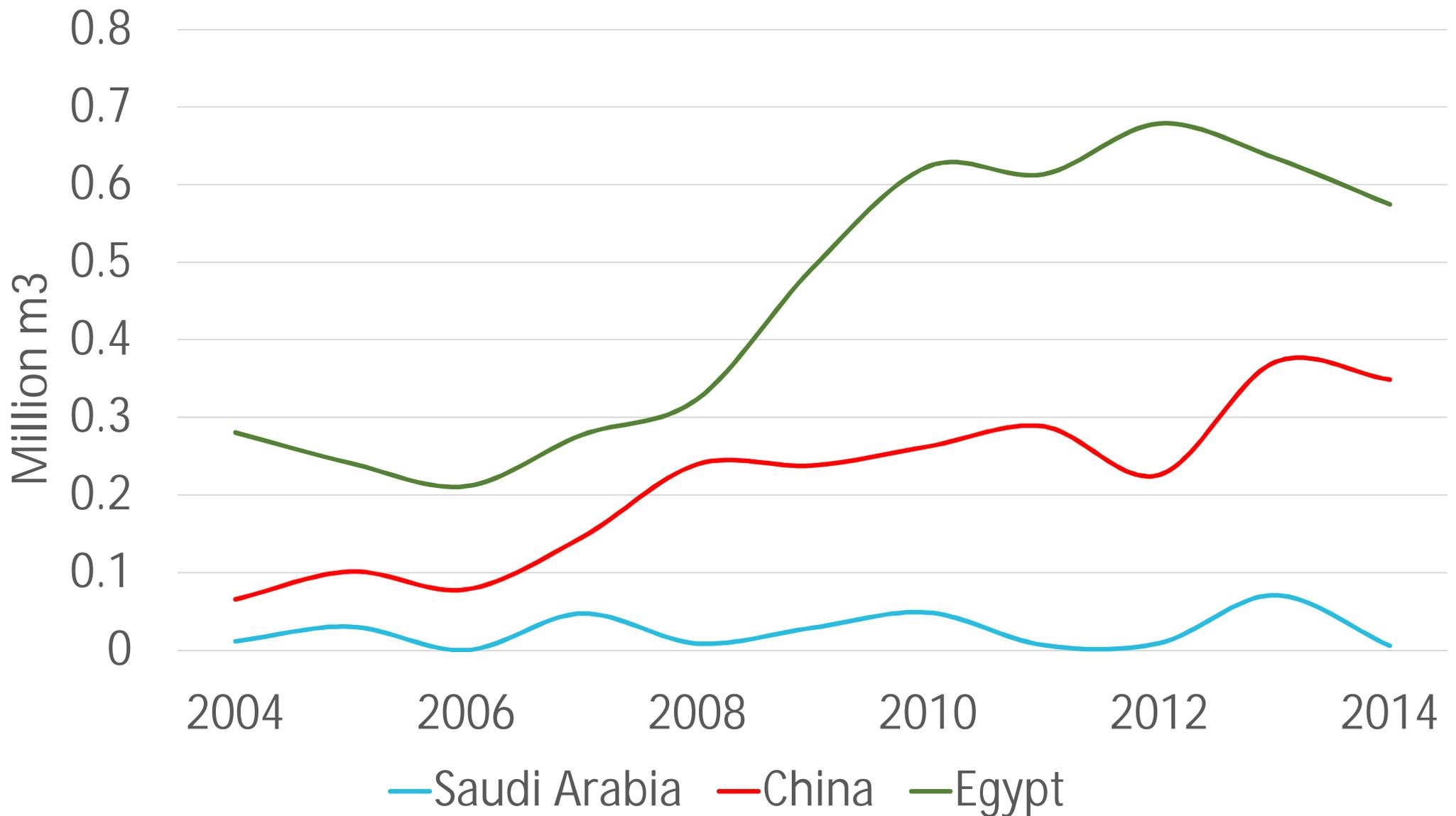
FASTEST GROWING

	2010-2015
1	Serbia to China +99%
2	Ukraine to Romania +70%
3	Croatia to China +52%
4	Germany to Mexico +52%
5	Slovakia to Poland +35%

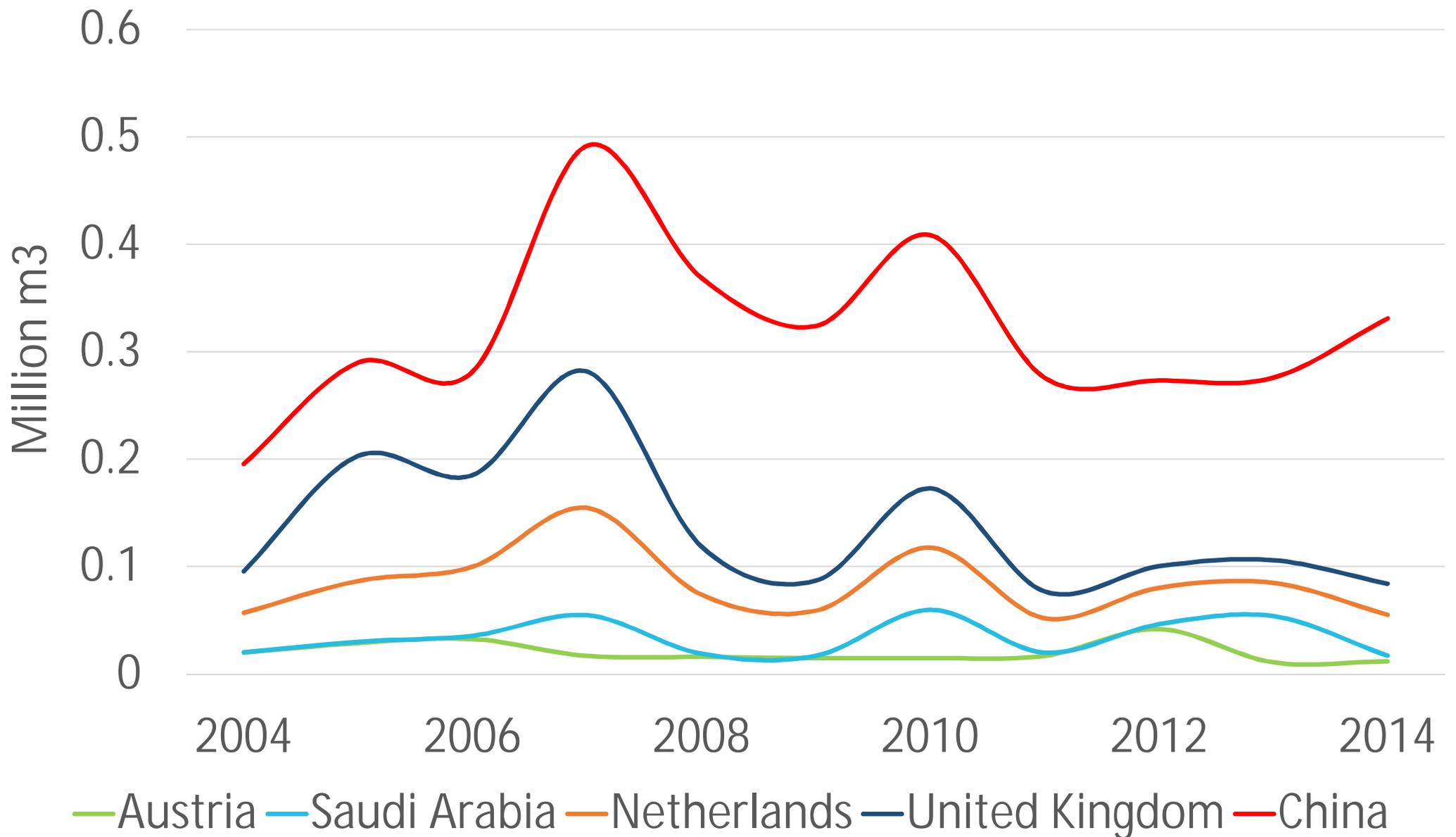
FASTEST DECLINING

	2010-2015
1	Romania to Syria -34%
2	Germany to Spain -15%
3	Austria to Germany -10%
4	Switzerland to Italy -8.5%
5	Germany to Italy -8.5%

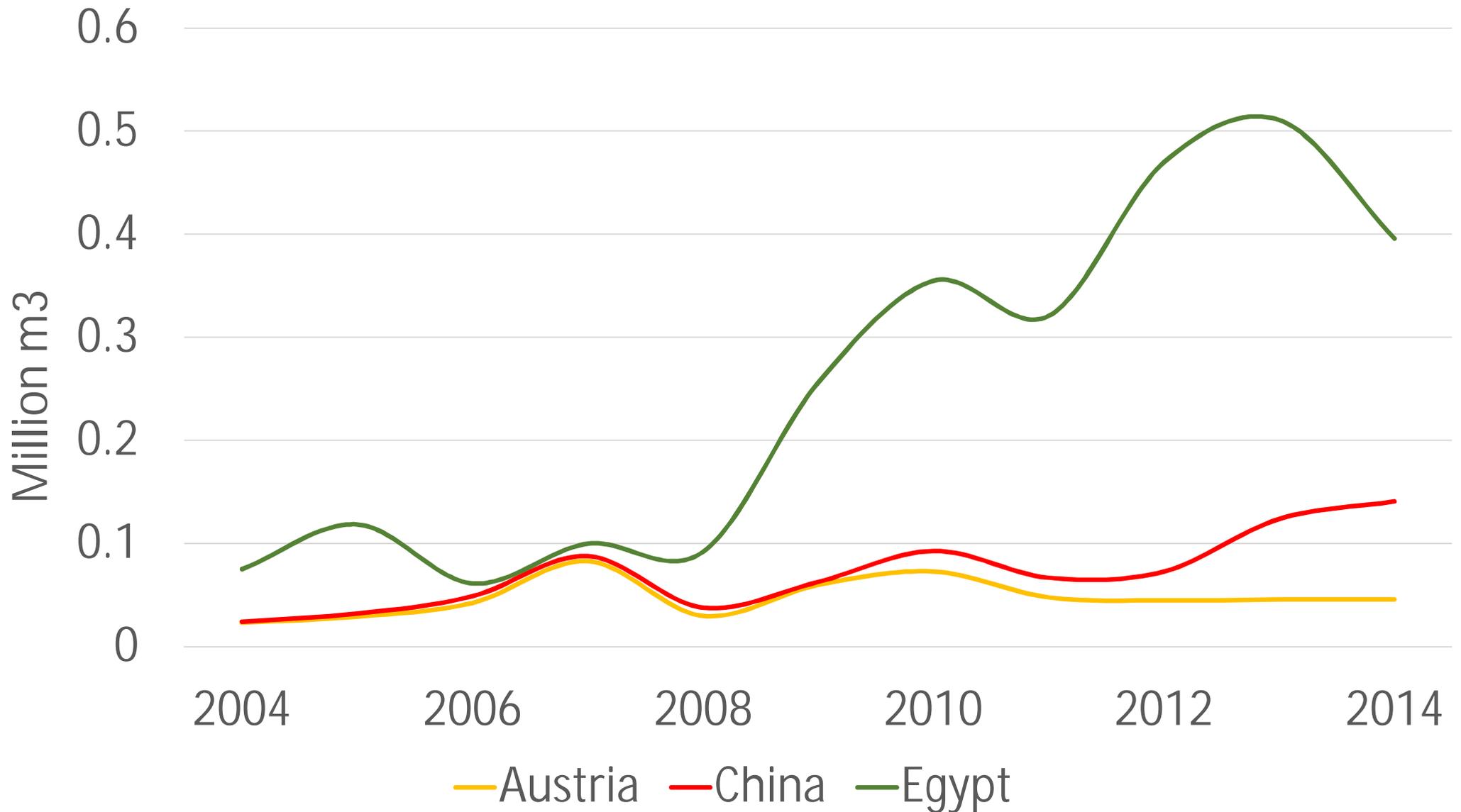
# Romania - sawn hardwood export



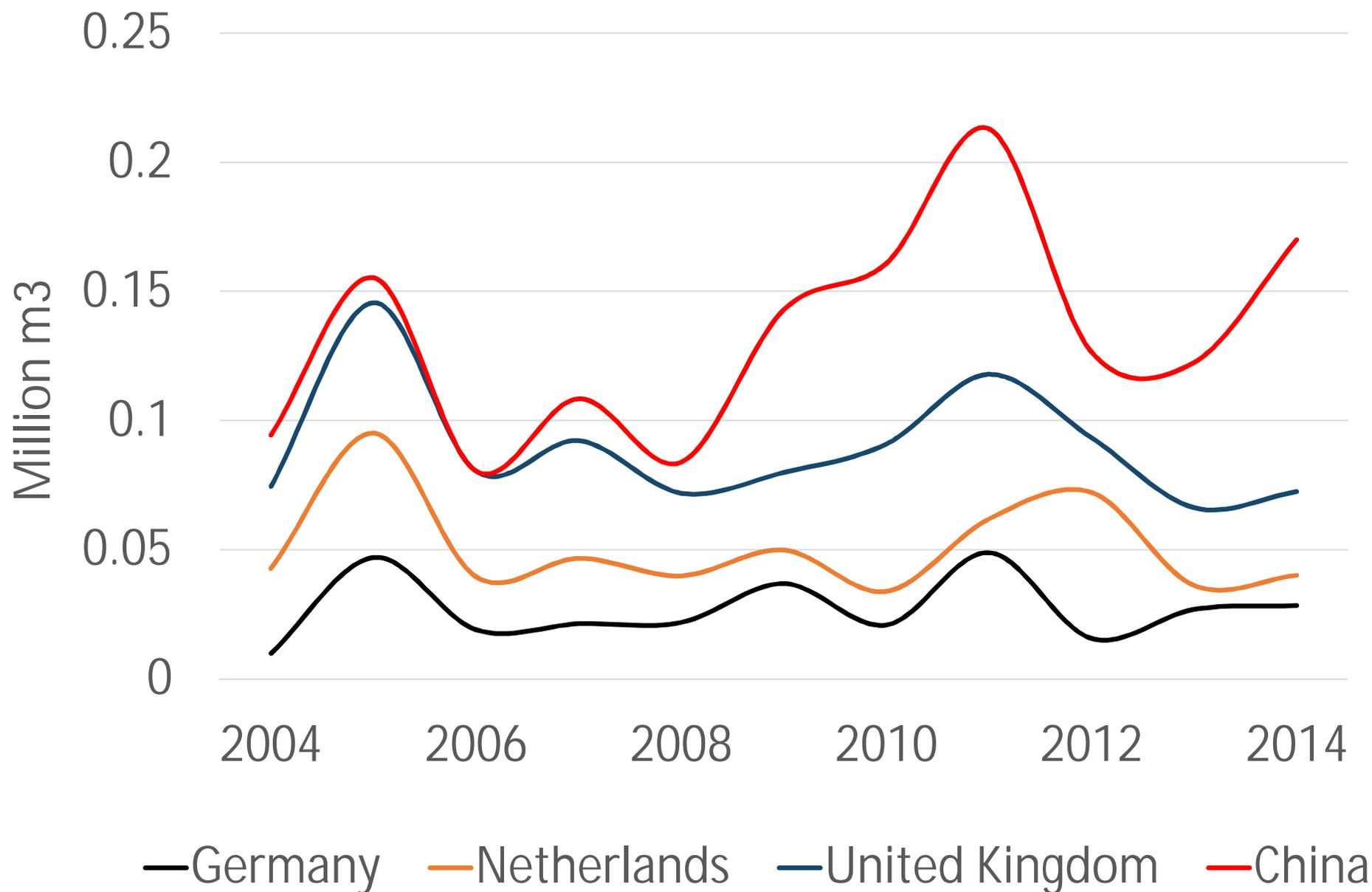
# Germany - sawn hardwood export



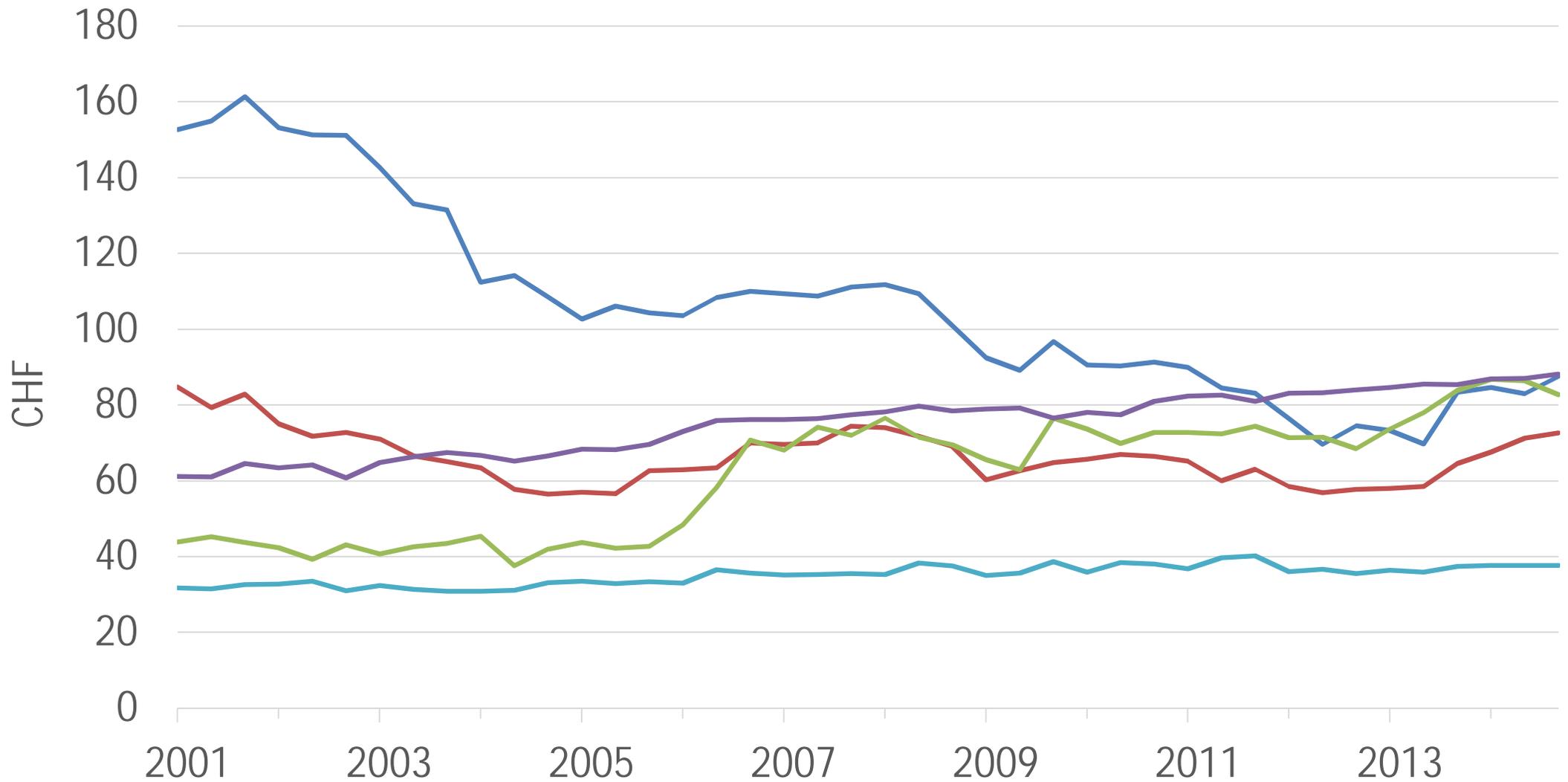
# Croatia - sawn hardwood export



# France - sawn hardwood export

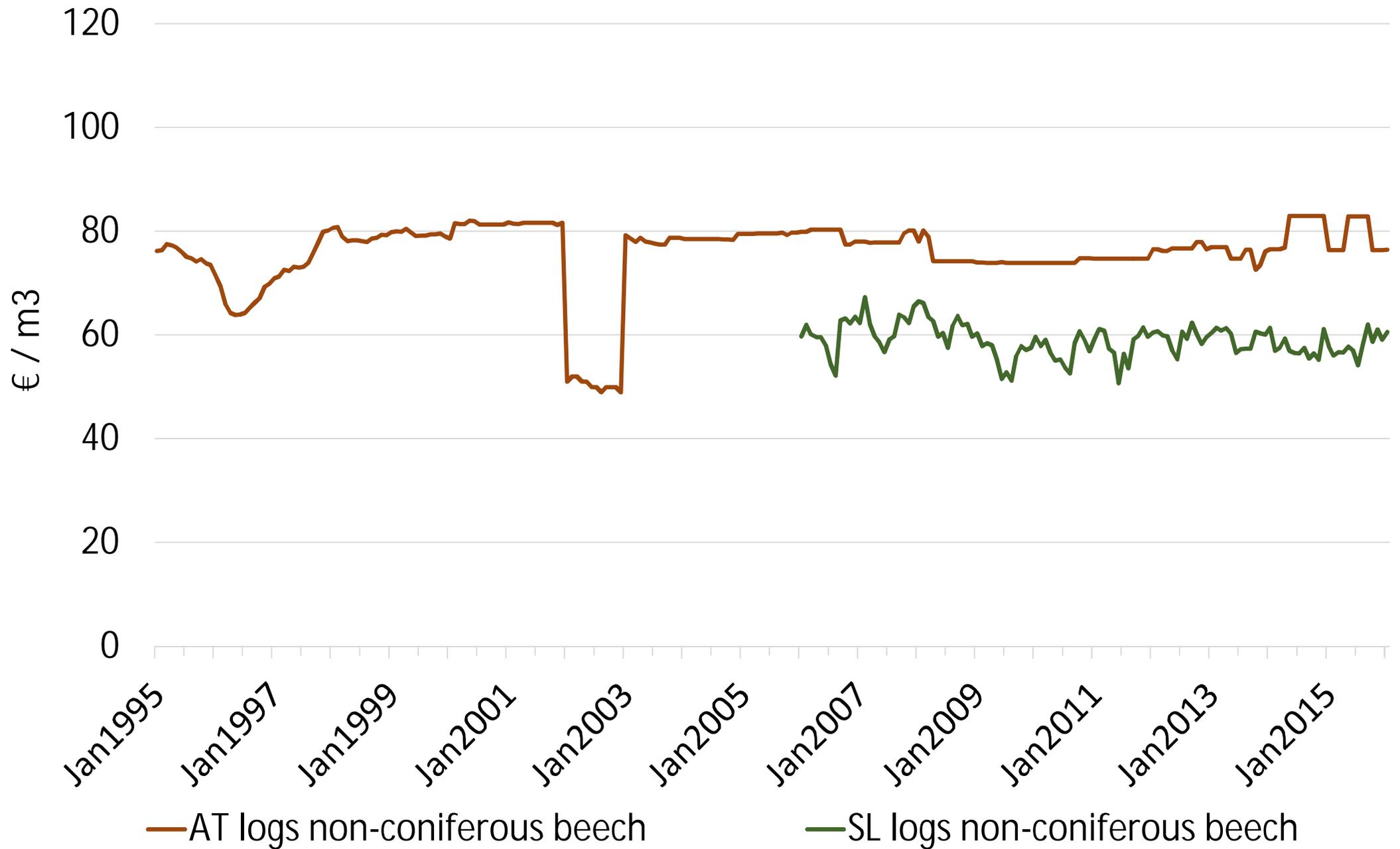


# Holzpreisentwicklung Schweiz 2001 - 2014



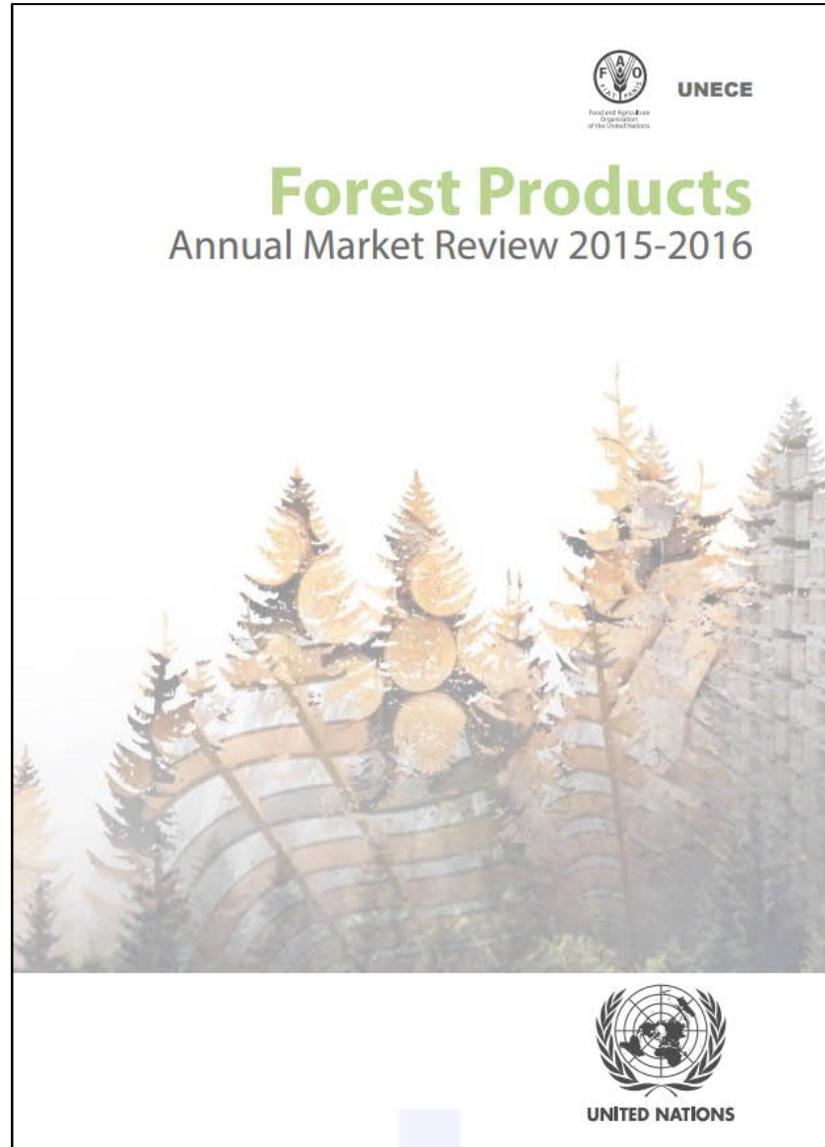
- Säge-Rundholz: Laubholz 2) Buche 4 B, 40-49, B, min. 3 m Fr. / Fm
- Säge-Rundholz: Laubholz 2) Buche 4 C, 40-49, C, min. 3 m Fr. / Fm
- Industrieholz Laubholz, I. Klasse, kranlang Fr. / Fm
- Energieholz Spalten (Buche) Fr. / Rm
- Holzchnitzel (Laubholz) 8) Schweiz Fr. / Rm

# Wood price development Austria & Slovenia



# Forest Products Annual Market Review

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# Forest Products Annual Market Review

## Sawn hardwood - highlights



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- Sawn hardwood production in the UNECE region increased by 1.8% in 2015, to 40.7 million m<sup>3</sup>, with increases in all three subregions.
- Falling consumption in Europe and the CIS in 2015 was offset by rising consumption in North America. European consumption of sawn hardwood decreased by 2.8%, to 12.2 million m<sup>3</sup>, due mainly to a significant decline in Turkish consumption.
- Multilayer parquet floors now account for about 84% of the European wood-flooring market by volume, while solid hardwood accounts for only 14%. There is a strong fashion trend for floorboards with grooves, knot holes and other irregularities.
- China continued to dominate the sawn hardwood trade. China's imports of tropical and temperate sawn hardwoods were valued at \$4.1 billion in 2015.
- Innovations in the hardwood sector – such as new hardwood cross-laminated timber, glulam and laminated veneer lumber products – aim to extend the use of hardwood into new (notably structural) applications.

# Forest Products Annual Market Review

## Value added wood products - highlights



### FORESTS

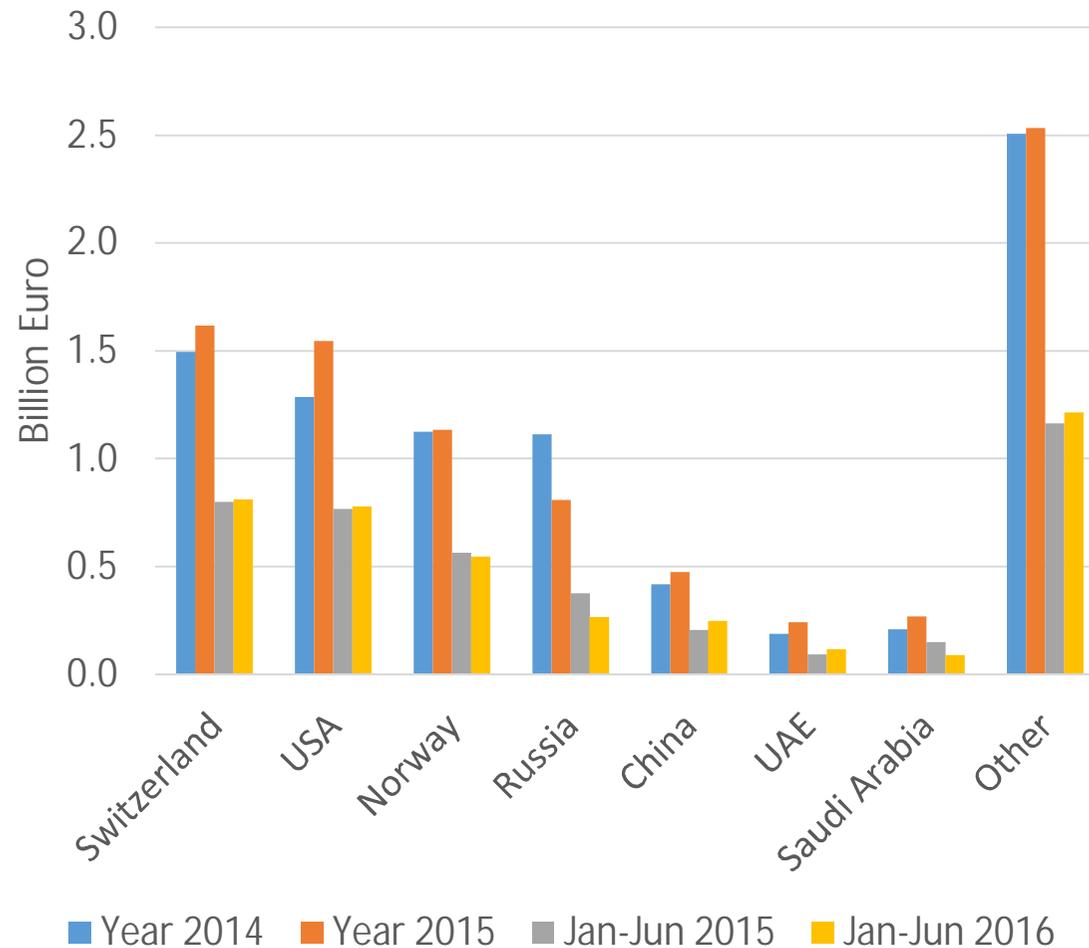
- Global furniture production was worth \$410 billion in (furniture trade estimated \$140 billion). Trade policies continue to influence the investment decisions of manufacturers.
- EU furniture industry output was stagnant overall in 2015 – in large western European manufacturing countries it was 20-30% below levels seen before the global financial crisis.
- Furniture companies are increasingly looking for ways to shorten delivery times to customers. Customization and designer furniture collections are aimed at increasing the competitiveness of production in the UNECE region.
- More than 50% of consumers in the US use mobile devices to access furniture stores online (+5% from 2010); traditional furniture stores are under pressure and adapt their business models to new ways of shopping.

# Switzerland & European furniture

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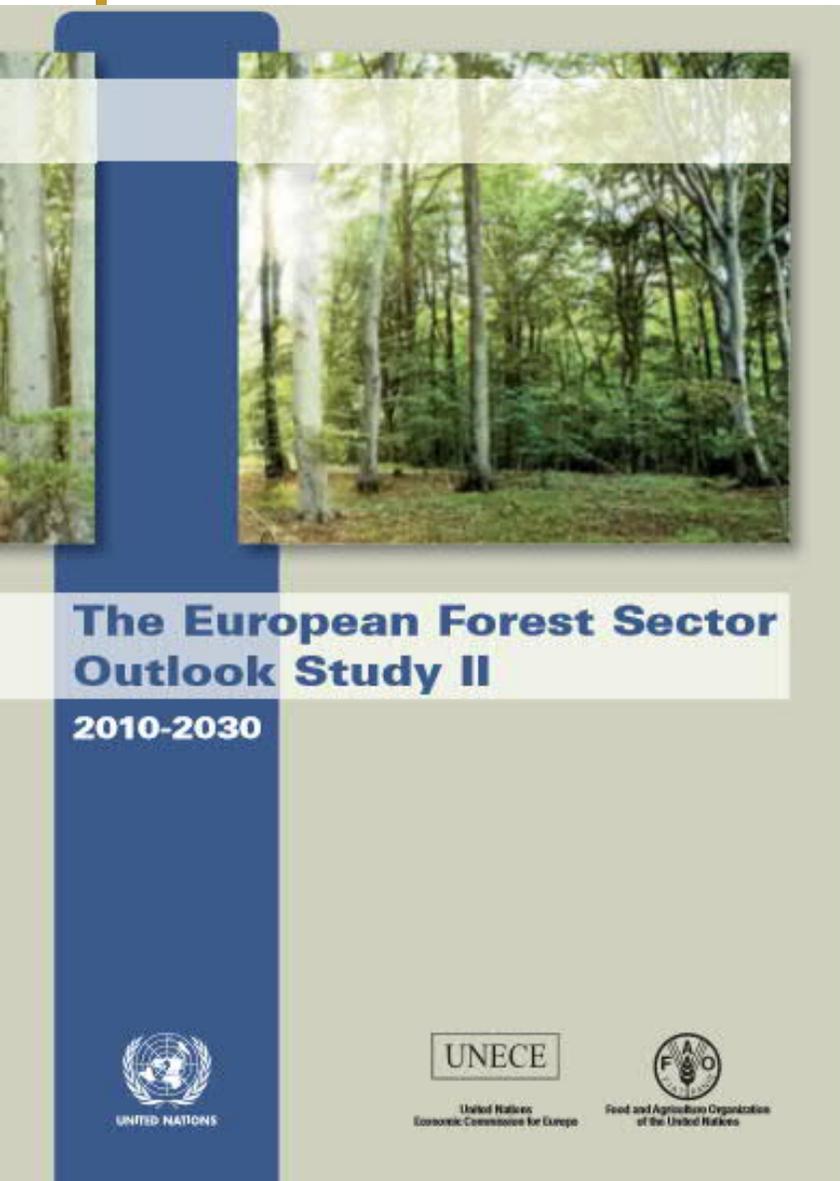


EU exports of wood furniture  
to countries outside the EU (ITTO IMM  
analysis of Eurostat COMEXT)



# European Forest Sector Outlook Study

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Main policy issues and challenges for the forest sector

- Mitigating climate change
- Promoting renewable energy
- Adapting to climate change and protecting forests
- Protecting and enhancing biodiversity
- Supplying renewable and competitive forest products to Europe and the world\*
- Achieving and demonstrating sustainability
- Developing appropriate policies and institutions

# Thank you!



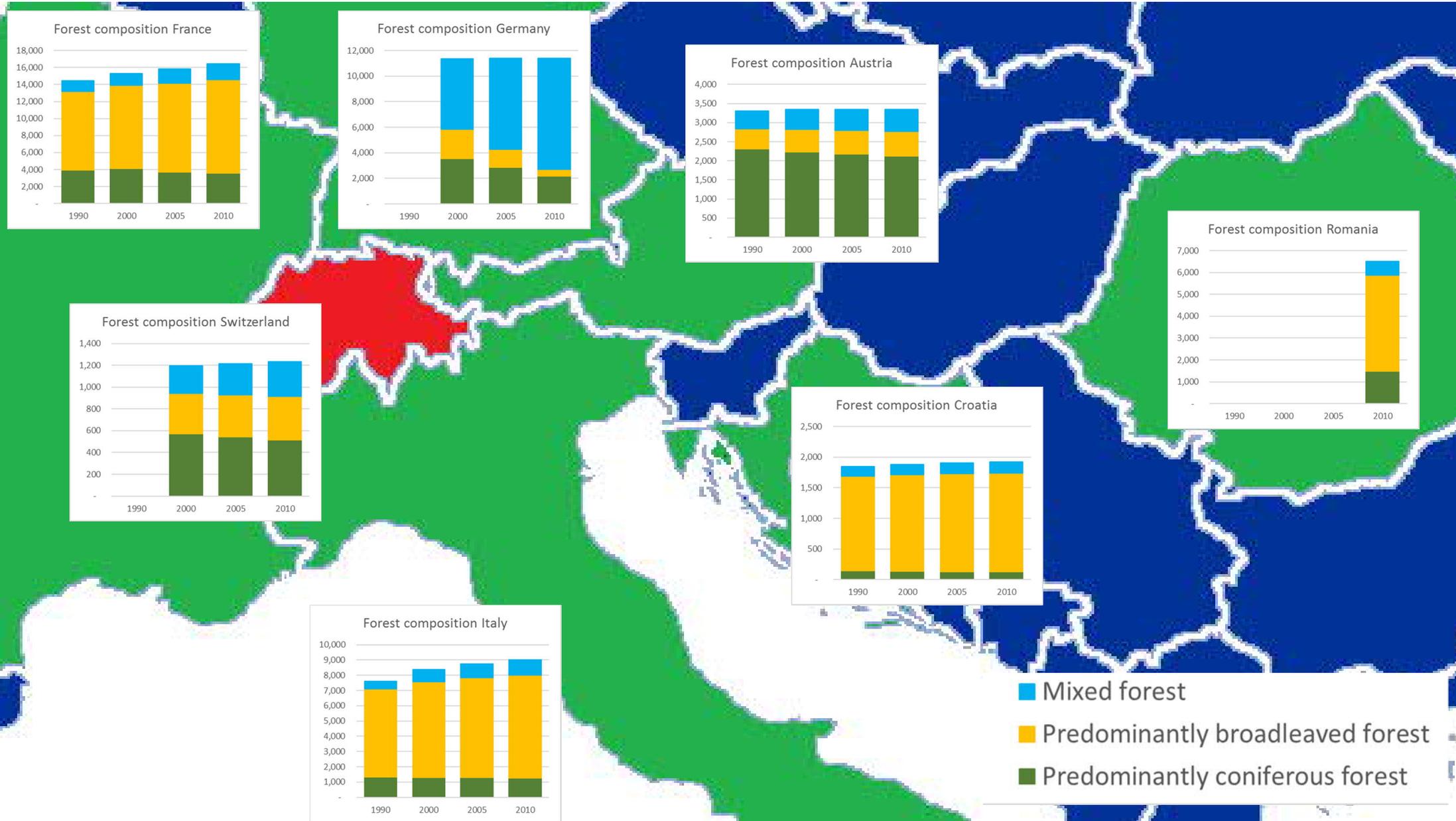
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Florian STEIERER  
UNECE/FAO Forestry and Timber Section  
11 May 2017, Bern



# Extent of broadleaved forest in AT/CH/DE/FR/HR/IT/RO



# Sawn hardwood trade

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To:		From:																							Grand total	
		Europe								CIS			North America			Non-UNECE										
		DEU	ROU	HRV	FRA	AUT	SWE	FIN	ITA	Total	RUS	UKR	Total	USA	CAN	Total	MYS	THA	LAO	CMR	IDN	GAB	BRA	VNM		Total
Europe	United Kingdom	0.2			0.3				0.4	1.8				0.9		1.1				0.3					0.8	3.7
	Italy			0.7						1.9				0.6		0.6				0.3					0.8	3.4
	Belgium				0.3					0.8										0.8		0.3			1.9	2.8
	Netherlands	0.2								1.1							0.8						0.2		1.4	2.7
	Germany									1.0				0.4		0.5									0.7	2.4
	France									0.8										0.3			0.2		1.1	2.0
	Israel							0.4		0.9																1.2
	Austria									1.1																1.1
	Poland	0.2								0.5			0.2													0.9
	<b>Total</b>		<b>1.9</b>	<b>0.6</b>	<b>1.5</b>	<b>1.3</b>	<b>0.7</b>	<b>0.4</b>	<b>0.5</b>	<b>1.0</b>	<b>14.2</b>		<b>1.1</b>	<b>1.4</b>	<b>3.3</b>	<b>0.4</b>	<b>3.7</b>	<b>1.6</b>			<b>2.5</b>	<b>0.3</b>	<b>0.6</b>	<b>0.8</b>	<b>8.3</b>	<b>27.6</b>