

# Analysis of timber production and trade data in Central & Eastern Europe



F O R E S T  
T R E N D S

Timber Regulation Enforcement Exchange: Vienna

Sep 16, 2015



# Brief note on data sources

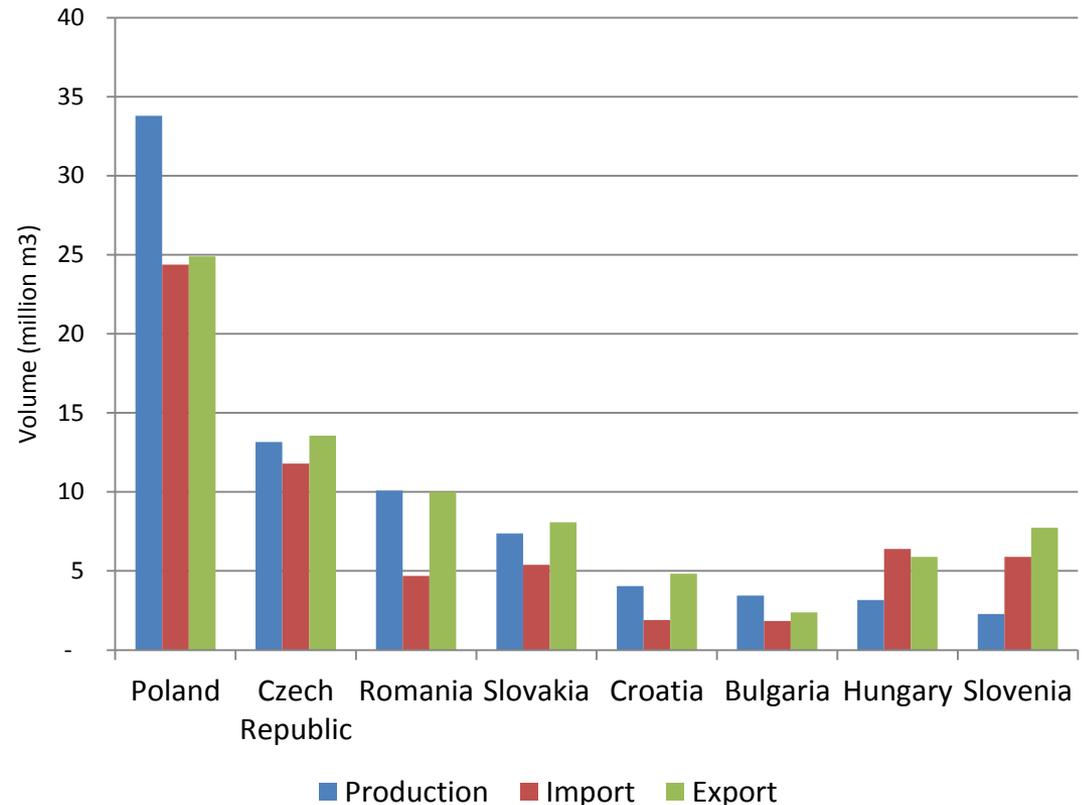


- FAO
  - EU forest production data
- Eurostat:
  - Main source for this analysis, focused on:
    - Bulgaria, Croatia, Czech Rep., Hungary, Poland, Romania  
Slovakia, Slovenia
    - Includes data for most relevant trade partners but does not include Russia
- Other data from UNComtrade and US ITC

# Overview: Production, imports, and exports of forest products, 2013



- Poland is the top producer, importer, and exporter in the region.
- Czech Republic and Romania also have significant timber and pulp & paper sectors. After Poland they are the two biggest EE suppliers across the EU-28.



\*Import/export data includes most but not all regions (e.g. imports do not include Russia).

# Forest Production in EU-28 in 2014

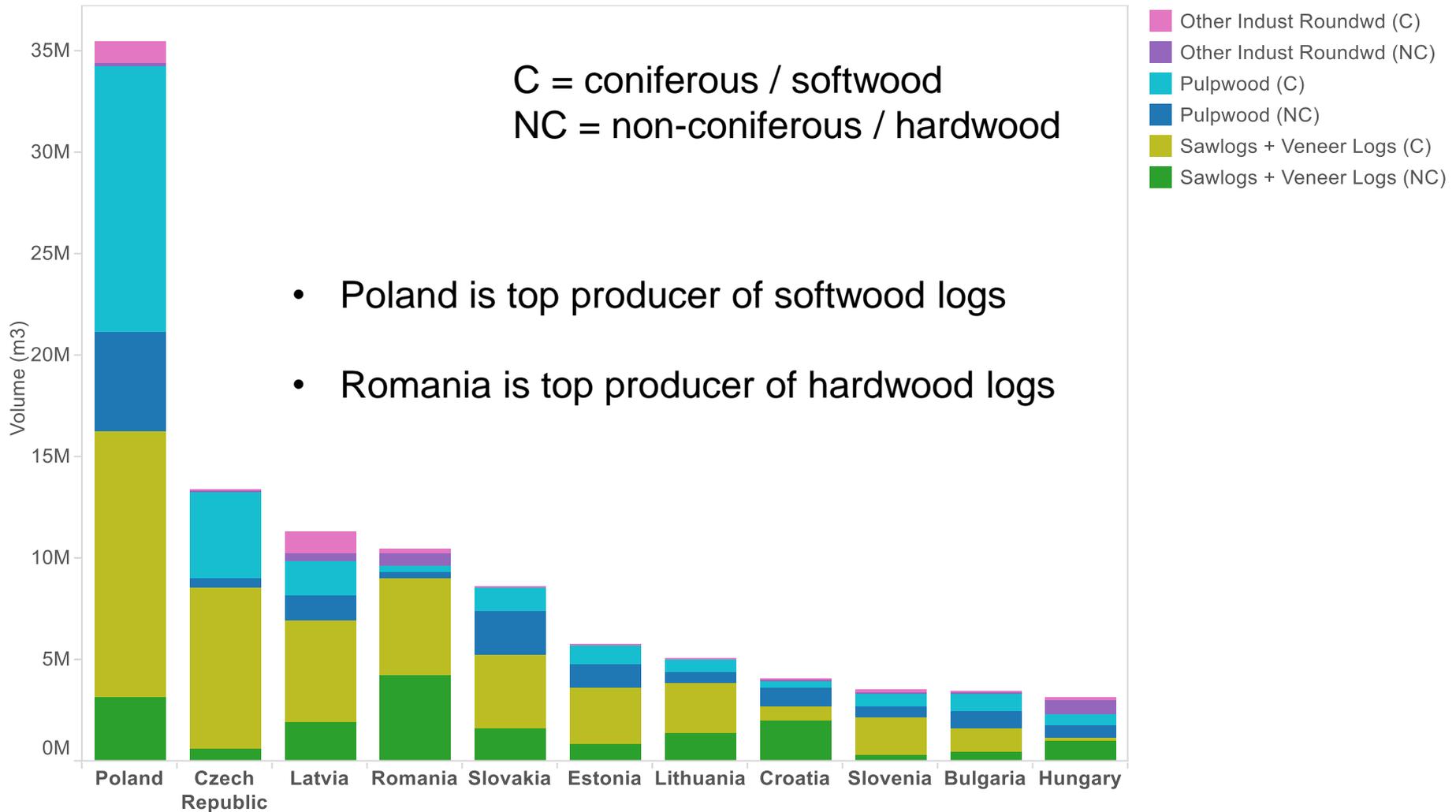


Sweden	64,200,000
Finland	49,201,623
Germany	43,242,535
Poland	35,425,000
France	25,832,279
Czech Republic	13,365,000
Spain	12,322,568
Austria	12,029,720
Latvia	11,298,195
Romania	10,484,285
Portugal	10,042,434
United Kingdom	9,361,042
Slovakia	8,607,917
Estonia	5,769,000
Lithuania	5,035,000
Belgium	4,235,240
Croatia	4,037,000
Slovenia	3,510,671
Bulgaria	3,452,860
Hungary	3,168,729



Source: FAOSTAT, compiled by James Hewitt for Forest Trends; data is in cubic metres

# Forest Production in 2014 by log type

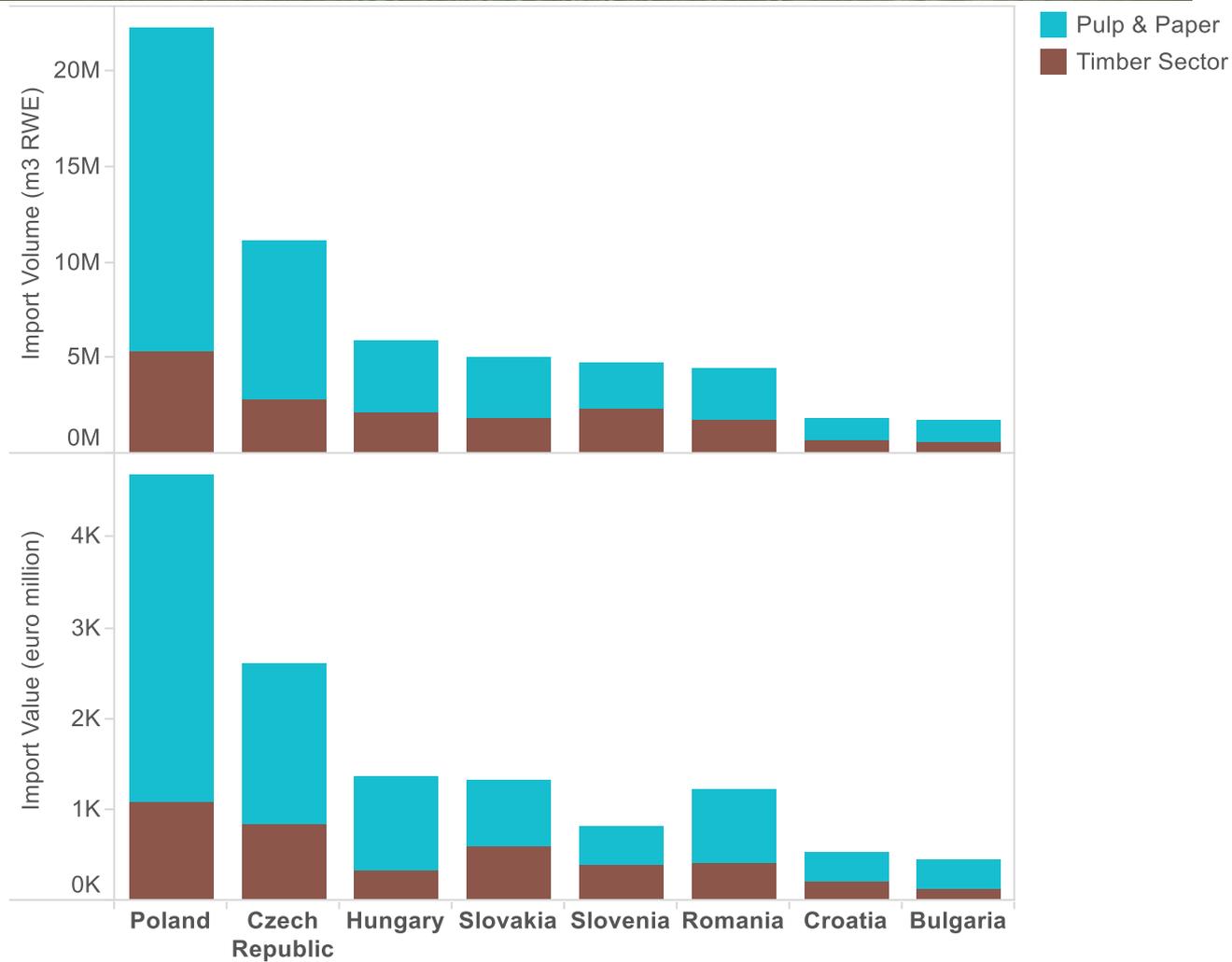


# Imports into C. & E. Europe



- Which countries are the major importers in the region?
- What products are being imported?
- Where are they being sourced from?

# Timber vs. pulp & paper imports, 2013



# Timber sector imports by product, by volume, 2014

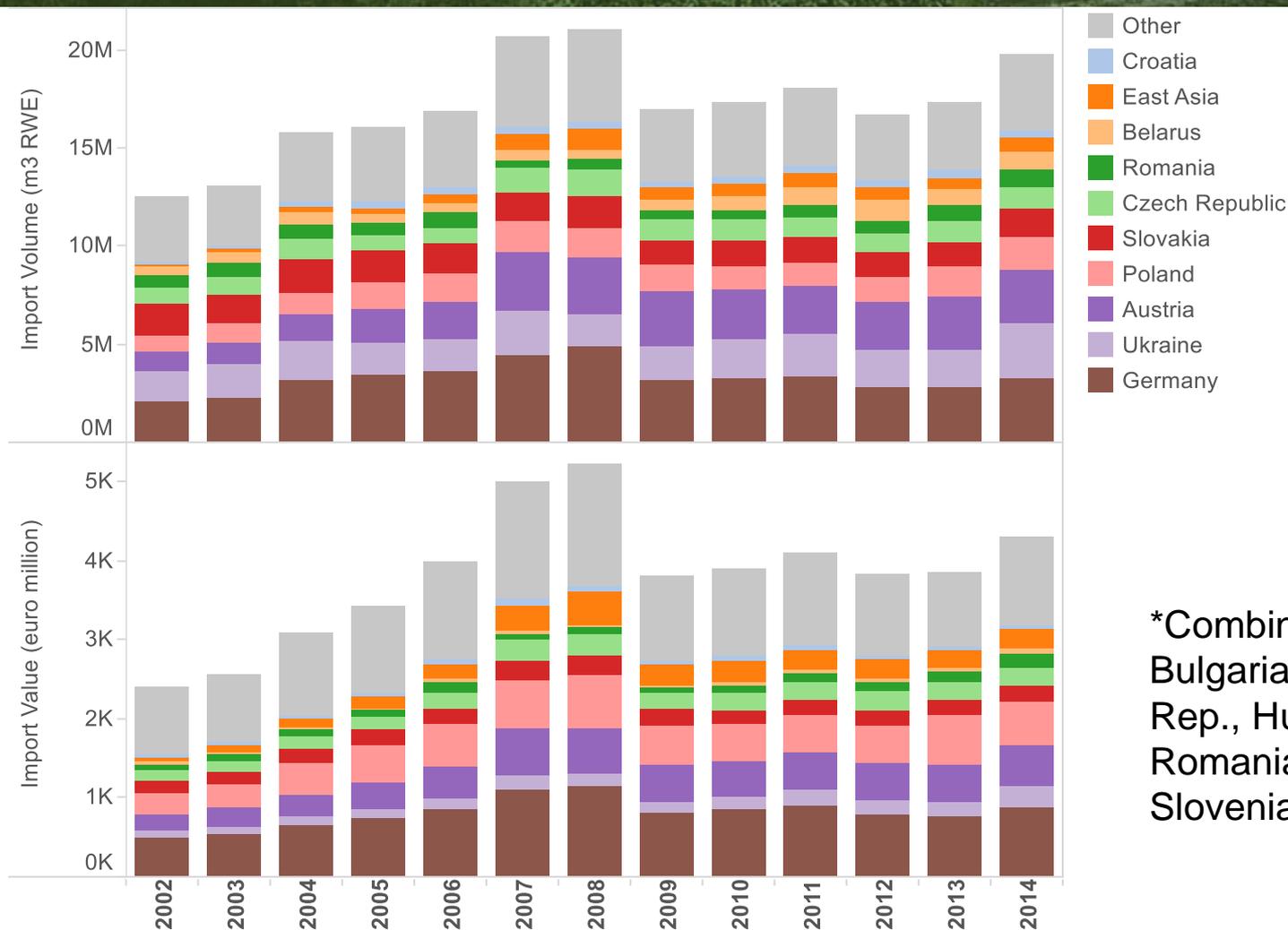


	Bulgaria	Croatia	Czech Republic	Hungary	Poland	Romania	Slovakia	Slovenia
<b>Sawn wood</b>	52	506	1,052	876	1,423	135	422	1,355
<b>Particleboard</b>	114	151	466	512	2,057	141	365	199
<b>Timber sector Logs</b>	28	8	525	211	861	845	496	160
<b>Fiber board</b>	113	75	251	210	756	412	211	85
<b>Wood Furniture</b>	66	167	429	163	519	172	184	111
<b>Plywood</b>	106	33	144	134	512	147	120	63
<b>Joinery</b>	35	43	141	119	181	151	97	47
<b>Mouldings</b>	5	19	80	47	106	28	120	17
<b>Veneer</b>	61	9	30	108	87	50	33	18

Import Volume (thous ..

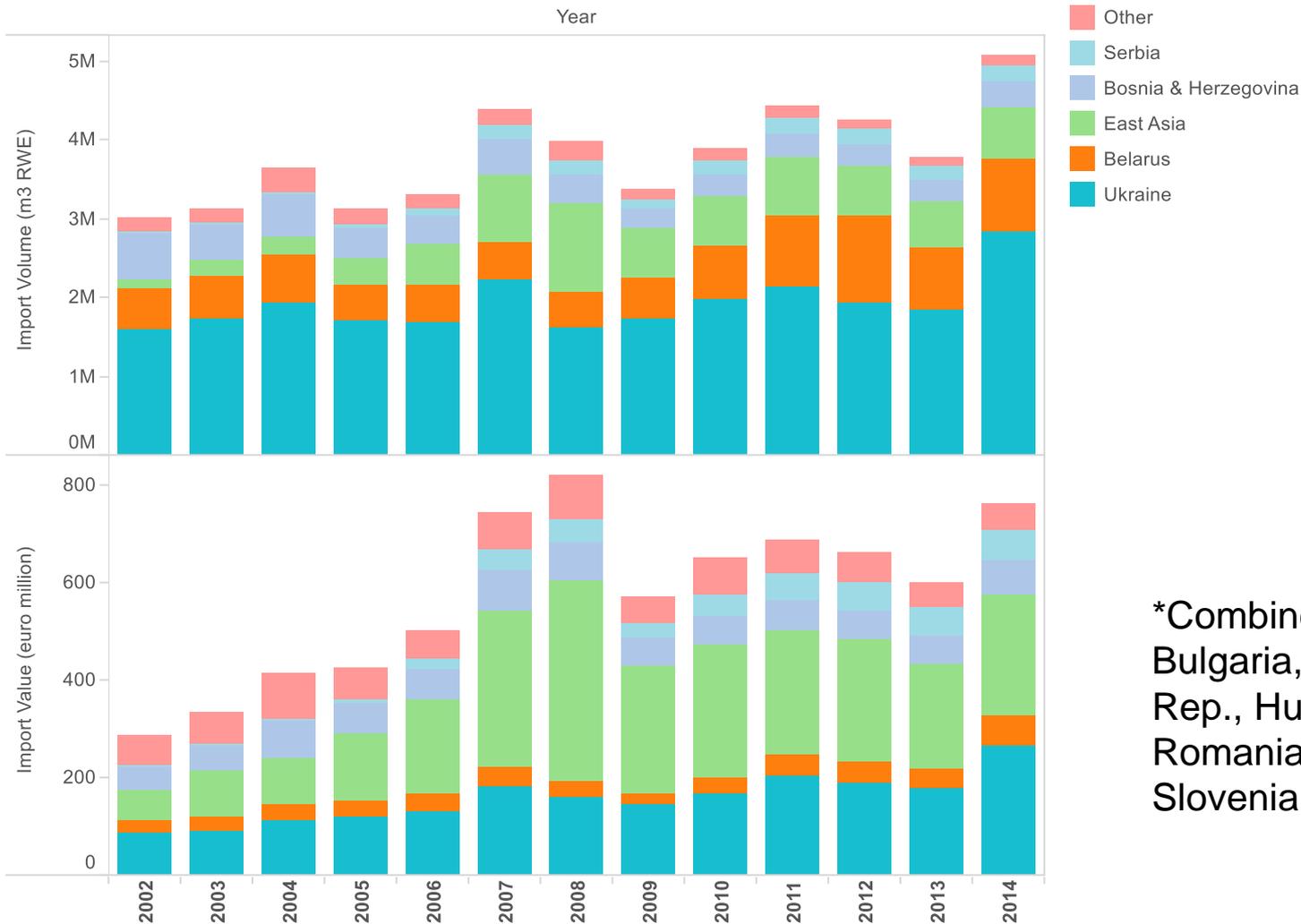


# Timber imports to C. & E. Europe\* by supplier country



\*Combined import data for Bulgaria, Croatia, Czech Rep., Hungary, Poland, Romania, Slovakia, Slovenia

# Non-EU timber imports to C. & E. Europe\* by supplier country

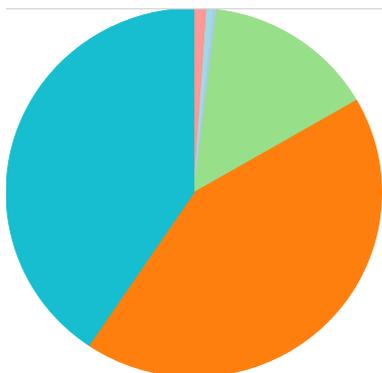


\*Combined import data for Bulgaria, Croatia, Czech Rep., Hungary, Poland, Romania, Slovakia, Slovenia

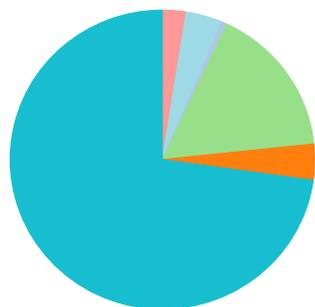
# Non-EU timber imports by supplier country, 2014



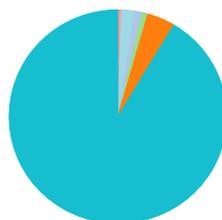
Poland



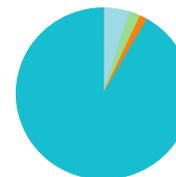
Romania



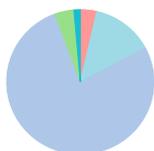
Hungary



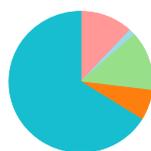
Slovakia



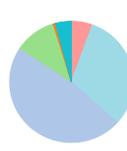
Croatia



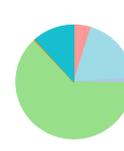
Czech Republic



Slovenia



Bulgaria

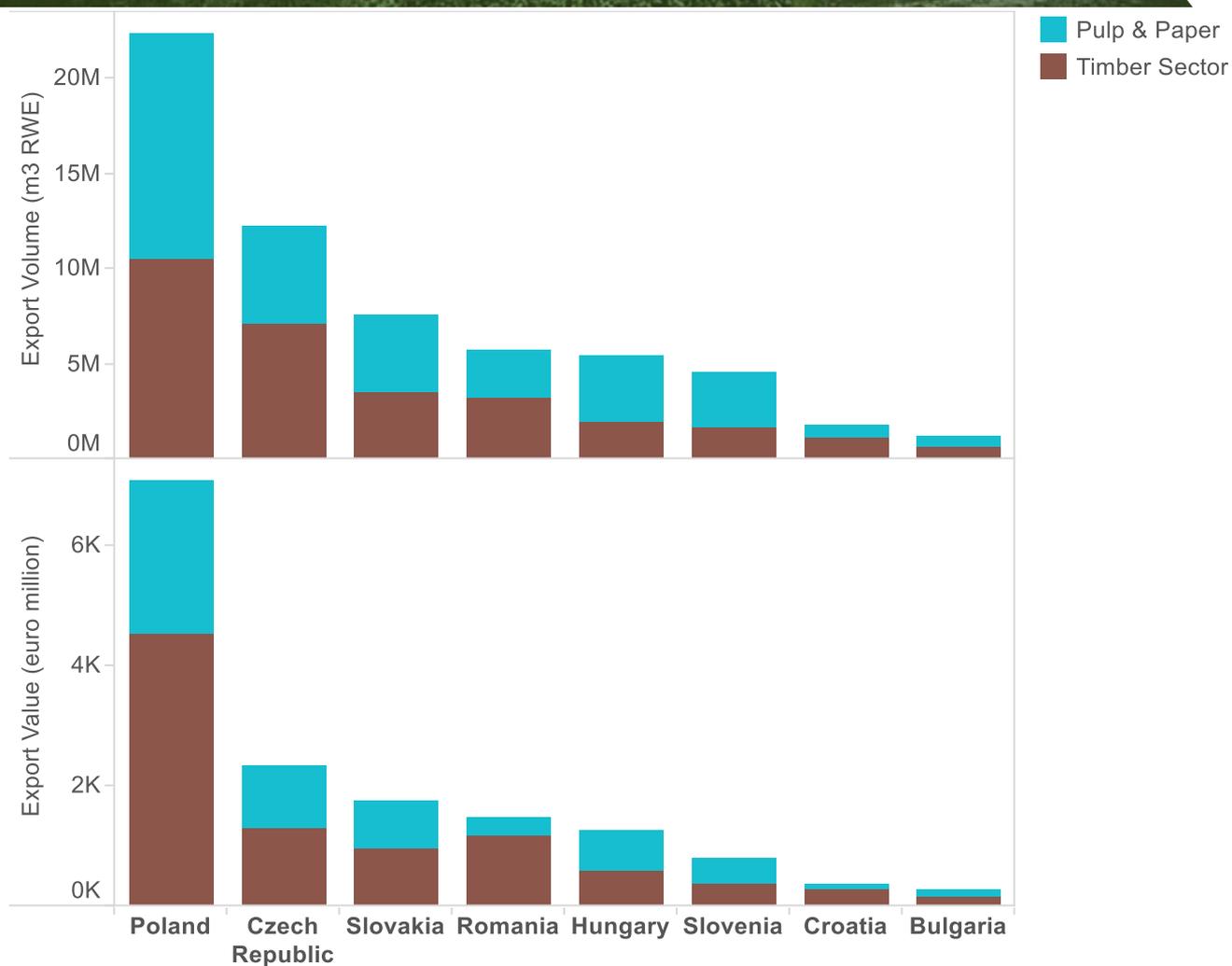


# Exports from C. & E. Europe



- What forest products are being exported from this region?
- Which countries are the main exporters?
- Where are these products going?

# Timber vs. pulp & paper exports to EU-28, 2013



# Timber exports by product by volume

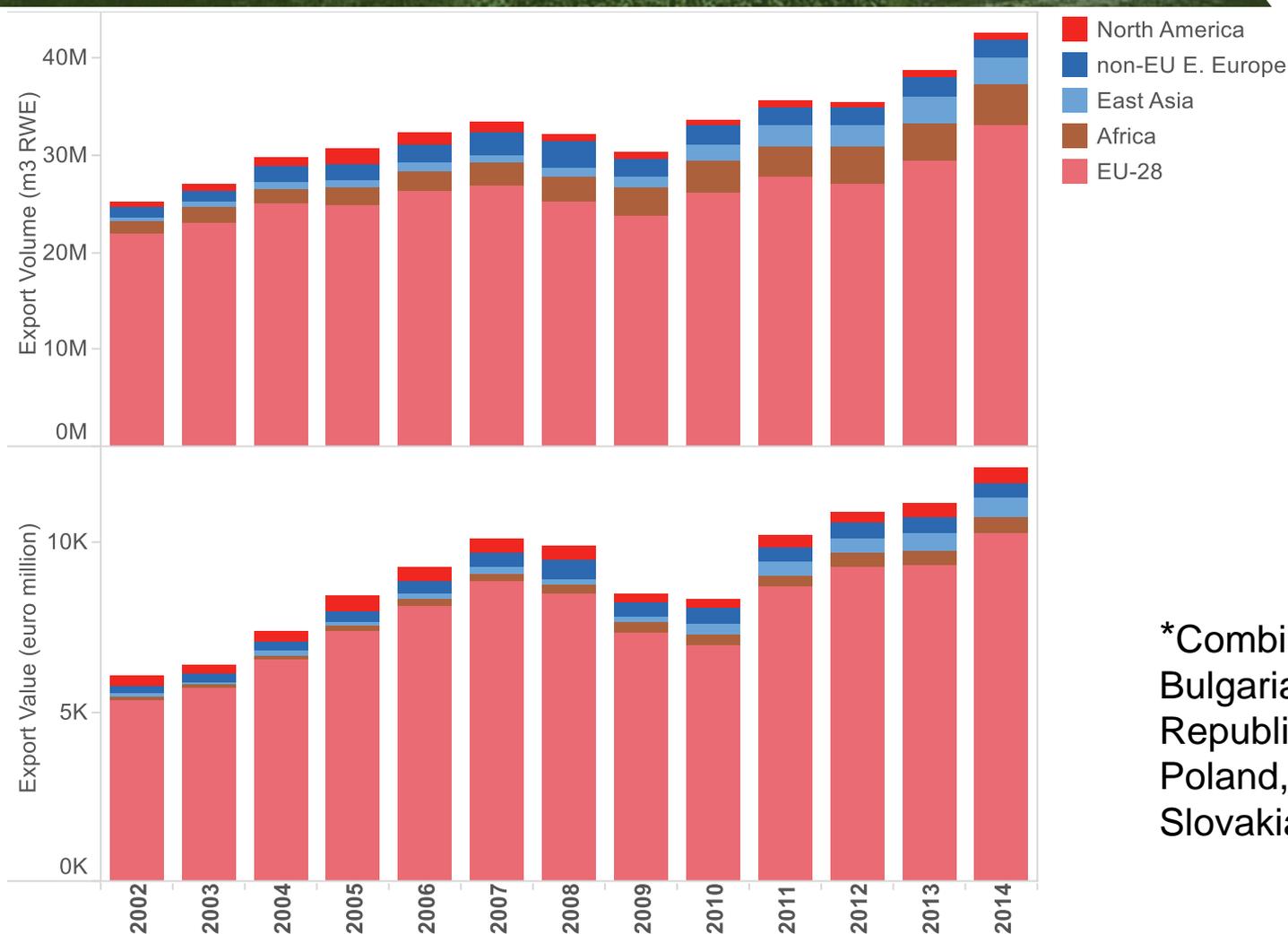


	Bulgaria	Croatia	Czech Republic	Hungary	Poland	Romania	Slovakia	Slovenia
Timber sector Logs	69	324	2,355	582	1,829	35	1,234	1,461
Wood Furniture	90	88	469	192	4,660	898	573	141
Sawn wood	183	817	2,405	396	1,125	472	1,226	318
Particleboard	200	61	1,686	329	613	1,196	255	72
Fiber board	84	3	100	266	1,509	242	19	177
Joinery	20	55	376	154	1,060	98	214	60
Plywood	50	5	273	132	386	214	169	93
Mouldings	10	57	88	19	515	19	22	7
Veneer	9	29	39	54	35	132	13	30

Exp Vol (thous m3)

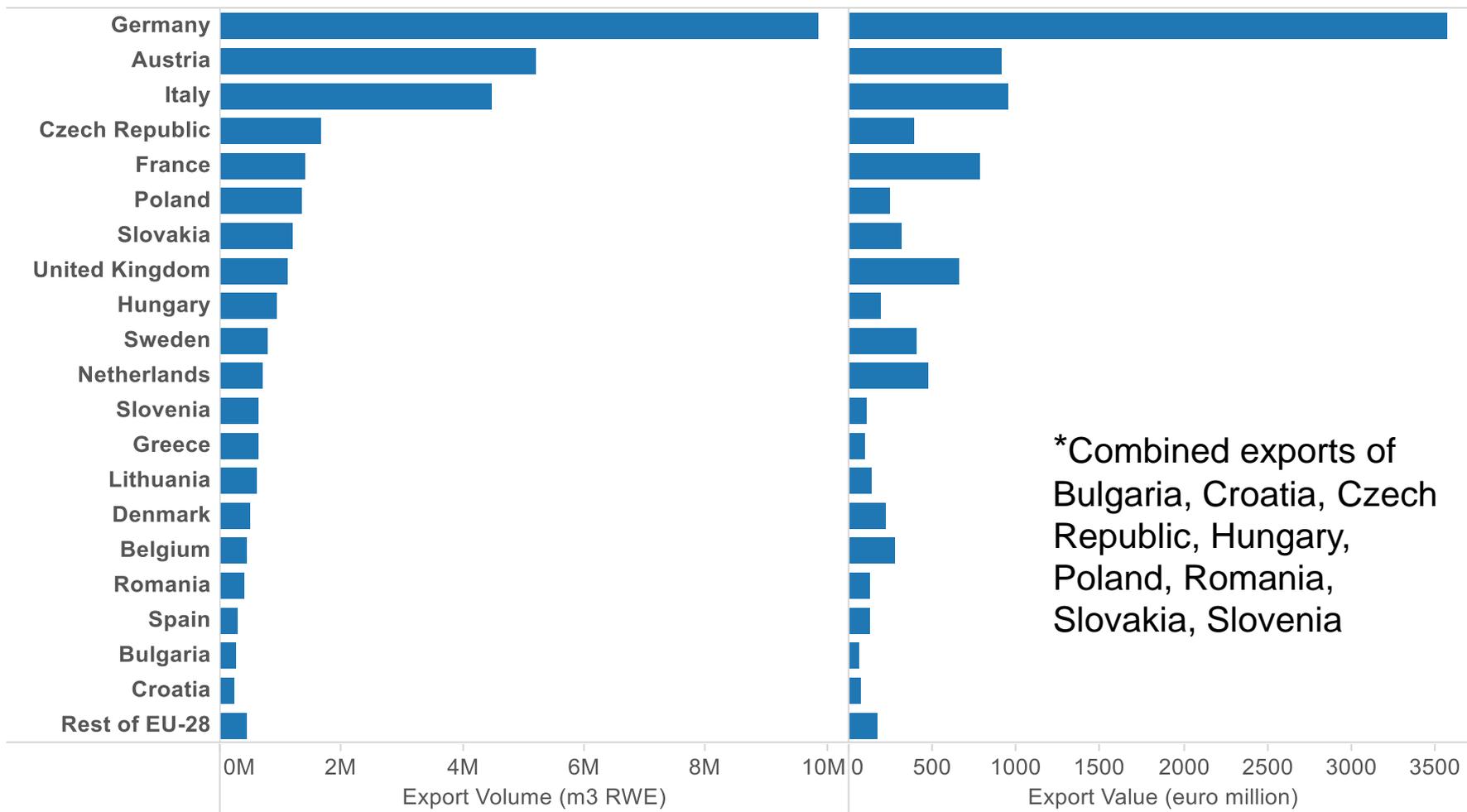


# Top destinations for C. & E. European Timber

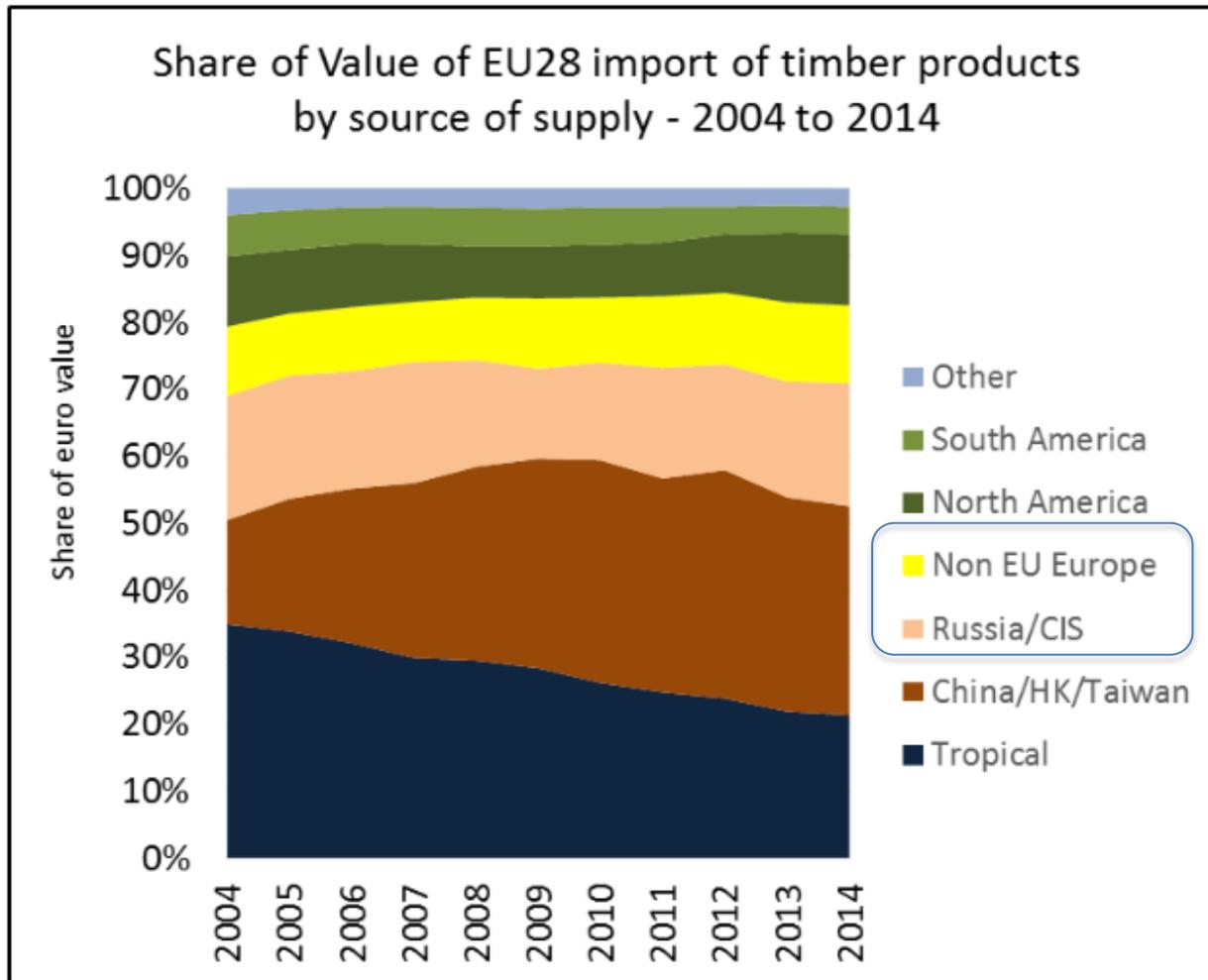


\*Combined exports of Bulgaria, Croatia, Czech Republic, Hungary, Poland, Romania, Slovakia, Slovenia

# Top destinations for C. & E. Europe\* Timber within EU-28 in 2014



# EU-28 timber product imports from Non-EU Europe and Russia/CIS



# Furniture sector in C. & E. Europe



- Furniture production in EU Eastern Europe has grown considerably in the last decade.
- Production growth has been particularly rapid in Poland, Romania, Lithuania, and Slovakia (Czech Rep. is also an important producer)
- Production is primarily export-oriented

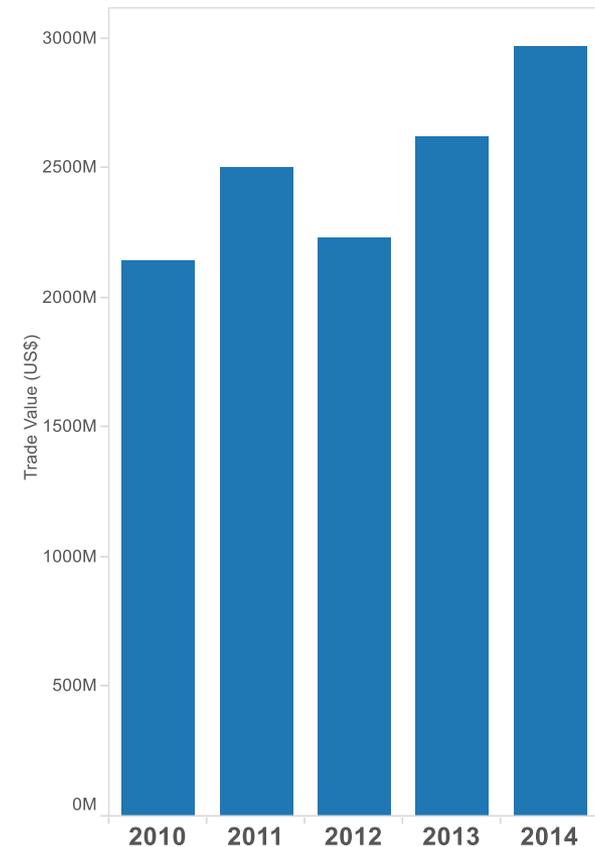


# Poland's Furniture Sector

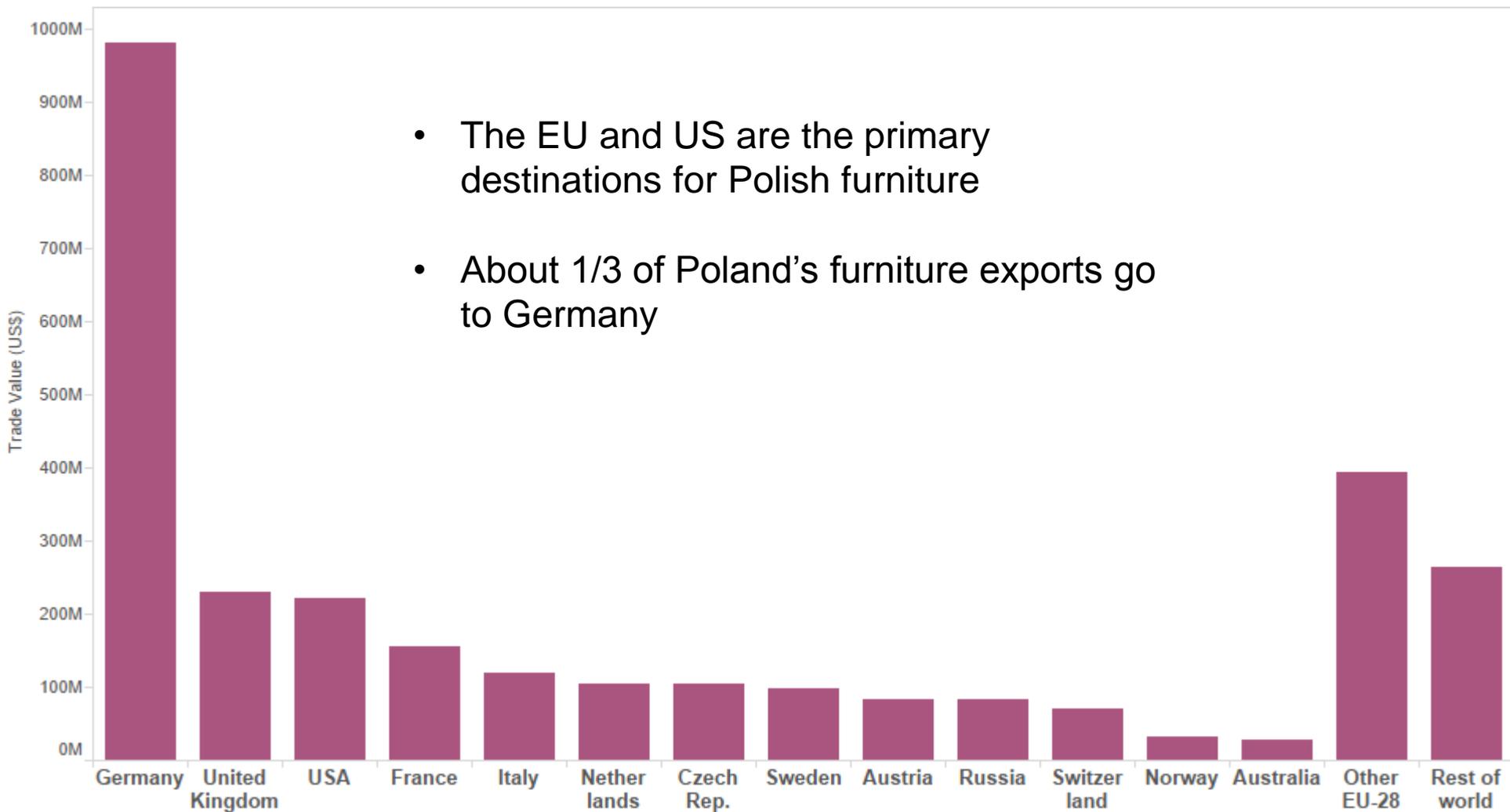


- Poland is the leading furniture exporter in E. Europe
- In 2012, it was the world's 7th largest manufacturer (up from 12th in 2002)
- And 4th largest exporter (up from 5th in 2002) after China, Germany and Italy

**Poland's global furniture exports, by value**

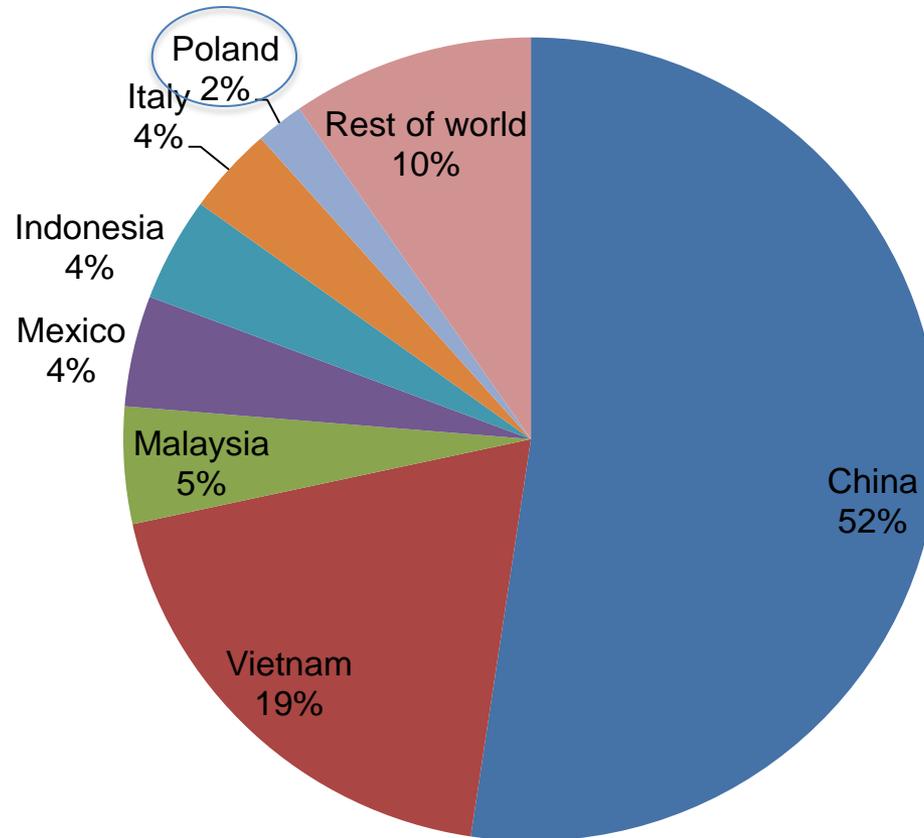


# Poland's global wood furniture exports by destination (2014)



- The EU and US are the primary destinations for Polish furniture
- About 1/3 of Poland's furniture exports go to Germany

# US wood furniture imports by value: 2014



# Romania's Furniture Sector



- Romania is the 2<sup>nd</sup> largest furniture producer in the region, after Poland
  - However, production in 2012 was only ¼ that of Poland
- Furniture production in Romania expanded at an annual average rate of 6.3% between 2002-2012
- Exports account for 88% of production and have driven this rapid growth
- Top export destinations are in EU (France, Germany, Italy, Netherlands, UK, Austria). Also exports to US.

A scenic landscape of rolling green hills and a dense forest under a cloudy sky. The foreground is dominated by a lush, green forest with various tree species. In the middle ground, there are rolling hills covered in dense vegetation, leading to a valley. The background shows more distant, hazy hills under a sky filled with soft, white clouds. The overall atmosphere is peaceful and natural.

# Thank you

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