

EUROPEAN HARDWOOD MARKET

2019.10.25

HUZHOU

SUMMARY

- Temperate hardwood
 - Key figures
 - Challenges and opportunities
- Tropical hardwood
 - Key figures
 - Challenges and opportunities
- Concerns over EU forests
- IHC 2019, Berlin

TEMPERATE HARDWOOD

Sawn wood :

| TOTAL EUROPE | Year | Production | Imports | Exports | Consumption |
|-----------------|-------|------------|---------|---------|-------------|
| | 2016 | 10.858 | 3.533 | 5.792 | 8.599 |
| | 2017* | 10.863 | 3.400 | 5.675 | 8.588 |

1.000 mc

**estimated*

Source: FAO

TEMPERATE HARDWOOD

| Country | Year | Production | Imports | Exports | Consumption |
|---------|------|------------|---------|---------|-------------|
| AUSTRIA | 2014 | 134 | 145 | 127 | 152 |
| | 2015 | 126 | 155 | 124 | 158 |
| | 2016 | 153 | 181 | 133 | 201 |
| BELGIUM | 2014 | 285 | 380 | 230 | 435 |
| | 2015 | 290 | 370 | 220 | 440 |
| | 2016 | 295 | 370 | 220 | 445 |
| DENMARK | 2014 | 73 | 200 | 100 | 225 |
| | 2015 | 76 | 200 | 100 | 176 |
| | 2016 | 80 | 200 | 100 | 180 |
| GERMANY | 2014 | 1.015 | 418 | 692 | 741 |
| | 2015 | 1.032 | 411 | 695 | 748 |
| | 2016 | 1.068 | 385 | 700 | 752 |
| FINLAND | 2014 | 40 | 27 | 13 | 54 |
| | 2015 | 40 | 20 | 14 | 47 |
| | 2016 | 40 | 18 | 16 | 42 |
| FRANCE | 2014 | 1.542 | 220 | 400 | 1.362 |
| | 2015 | 1.479 | 200 | 430 | 1.249 |
| | 2016 | 1.500 | 200 | 450 | 1.250 |
| ITALY | 2014 | 520 | 593 | 135 | 978 |
| | 2015 | 550 | 601 | 154 | 997 |
| | 2016 | 550 | 590 | 161 | 979 |

| Country | Year | Production | Imports | Exports | Consumption |
|----------------|------|------------|---------|---------|-------------|
| LATVIA | 2014 | 717 | 21 | 498 | 240 |
| | 2015 | 810 | 30 | 590 | 250 |
| | 2016 | 690 | 29 | 466 | 253 |
| NORWAY | 2014 | 0 | 23 | 0 | 23 |
| | 2015 | 0 | 24 | 0 | 24 |
| | 2016 | 0 | 24 | 0 | 24 |
| ROMANIA | 2014 | 1.700 | 29 | 712 | 918 |
| | 2015 | 1.795 | 29 | 726 | 1.179 |
| | 2016 | 1.700 | 125 | 800 | 1.025 |
| SWEDEN | 2014 | 100 | 28 | 9 | 120 |
| | 2015 | 100 | 28 | 4 | 124 |
| | 2016 | 100 | 25 | 4 | 121 |
| SWITZERLAND | 2014 | 65 | 35 | 15 | 85 |
| | 2015 | 60 | 35 | 15 | 80 |
| | 2016 | 55 | 35 | 10 | 80 |
| UNITED KINGDOM | 2014 | 47 | 400 | 20 | 430 |
| | 2015 | 44 | 338 | 17 | 365 |
| | 2016 | 40 | 330 | 20 | 350 |

1.000 cbm

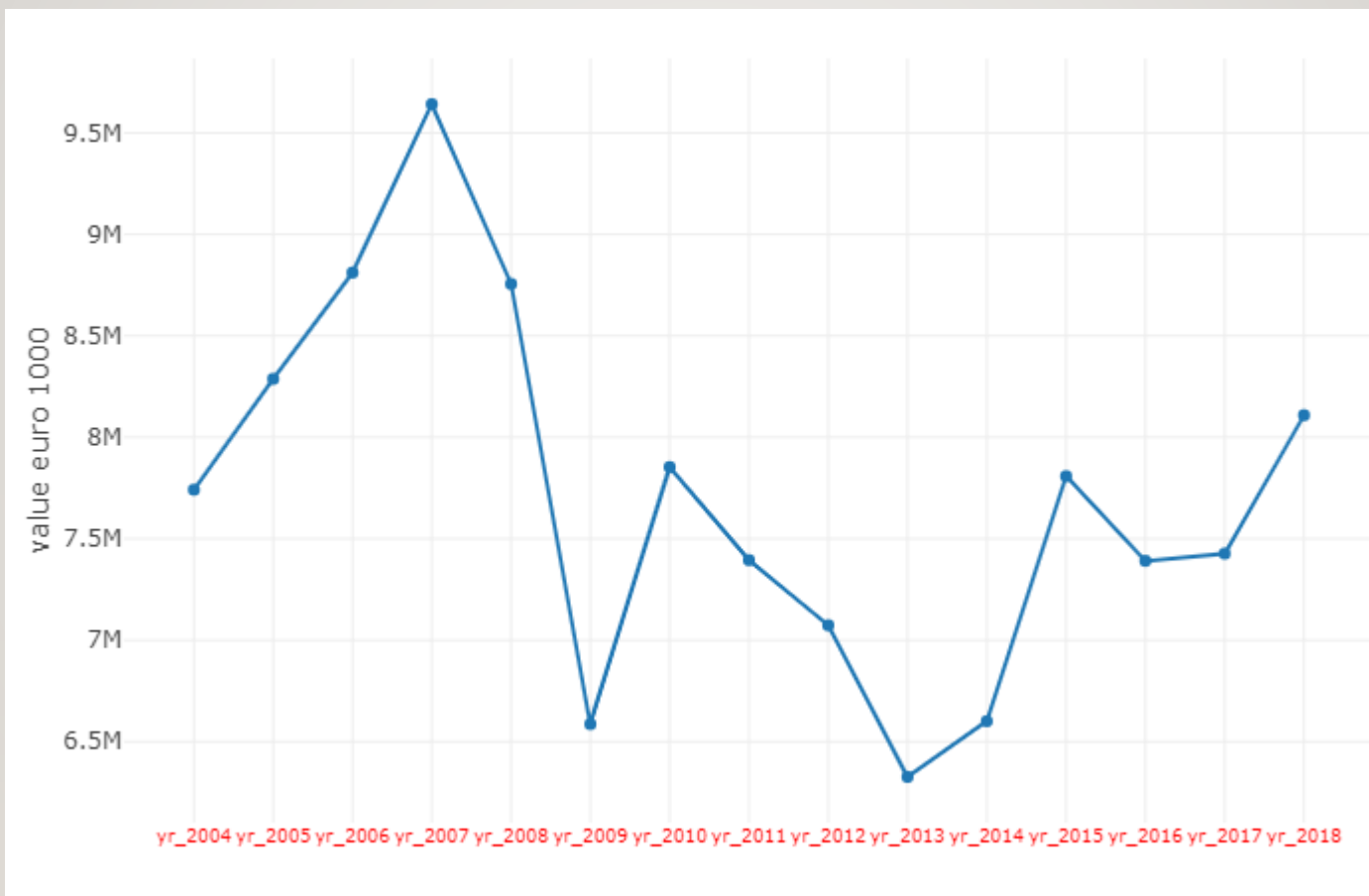
Source EOS

CHALLENGES & OPPORTUNITIES

- **Supply pressure of softwood lumber** opens up new opportunities
 - Importance of R&D for structural wood use
- **Short supply chains** are on the rise
- Wood remains an underdog **material**
 - Importance of national, European and international coordination (lobbying, technical, communication...)
- **Structuring and specialisation of the sector**
 - Importance of working on the attractiveness of the sector and training

TROPICAL HARDWOOD

Total imports from tropical countries by EU member:



CHALLENGES & OPPORTUNITIES

- **Orientation of flows to other markets**
- Tropical woods have **undeniable qualities**
- Need for **standardisation** and life cycle analyses
- Importance of communication (prescribers, general public...)
- Strong competition from other timber species and materials
- The **stakes of legality** are becoming more and more important

CONCERNS OVER EU FOREST SECTOR



- **Bark beetle**
 - Affecting spruce population
 - Price per m³ dropping



- **Storm timber**
 - Italian mountainous sector hit
 - 8.5M m³ (5 to 7 years of harvest)
- **Droughts**



21.-22.11. **BERLIN**

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INTERNATIONAL HARDWOOD CONFERENCE



Focus on economic overview and market development.

<https://ihc2019.berlin/>