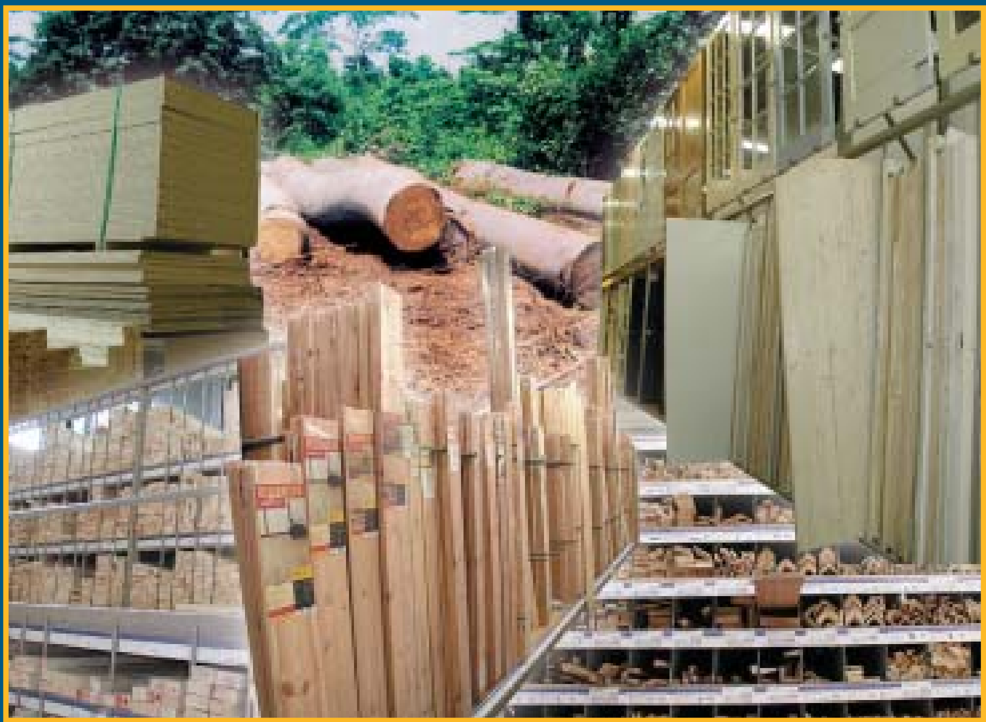
EU MARKET SURVEY 2002

TIMBER AND TIMBER PRODUCTS

VOLUME II



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TIMBER AND TIMBER PRODUCTS

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REPORT SUMMARY

This EU market survey profiles the EU market for timber and timber products. The emphasis of the survey lies on those products which are of importance to developing country suppliers. The major national markets within the EU for those products are highlighted. The survey includes contact details of importers, trade associations and other relevant organisations. Furthermore, statistical market information on consumption, production and trade, and information on trade structure and prices and margins is provided.

As an exporter, you need this information in order to formulate your own market and product strategies. To assist you with this, CBI has developed a matching EU Strategic Marketing Guide Timber and Timber Products. It offers a practical handbook for exporters engaged, or wishing to engage, in exporting timber and timber products to the European Union. It aims to facilitate exporters in formulating their own markets and product strategies, through the provision of practical information and a methodology of analysis and ready-to-fill-in frameworks.

As mentioned above, statistical market information on consumption, production and trade, and information on trade structure and prices and margins, which is required for the ready-to-fill-in frameworks, can be found in this EU Market Survey.

Market research
This EU Market Survey and the EU Strategic Marketing Guide serve as a basis for further market research: after you have read this survey and then filled in the frameworks in the strategic marketing guide, it is important to further research your target markets, sales channels and potential customers.

Market research depends on secondary data (data that have been compiled and published earlier) and primary data (information that you collect yourself).
An example of secondary data is this EU Market Survey. Primary data are needed when secondary data fall short of your needs, for example when researching your specific type of consumer about the acceptance of your specific product. Sources of information are, among others, (statistical) databanks, newspapers and magazines, market reports, (annual) reports from branch associations, but also retail outlets in target countries, products or catalogues from your competitors, and conversations with suppliers, specialists, colleagues and even competitors.
After you have received/collected your information, you should analyse the information. In order to judge the attractiveness of the market, sales channel or customer you should use/develop a classification or score system. For more detailed information on market research reference is made to CBI's Export Planner (2000).

Consumption
At a global level, the timber market can be characterised by sluggish demand, expanding supply and low prices. Between 1997 and 1999, the apparent consumption of roundwood in the EU/EFTA region increased only marginally. But between 1999 and 2000, there was significant growth of 3.3 %.
The demand for roundwood in West European countries is increasingly dominated by an ever smaller number of large wood-processing companies, leading to weaker pricing power of the traditional small, private and municipal forest owners and state forest services.
More than 90 percent of EU sawn timber consumption consists of softwood. According to ITTO, the International Tropical Timber Organisation, the leading EU consumers of tropical timber are Italy and France. Although Germany is a big user of timber, it is a relatively small consumer of tropical timber.

Timber consumption is greatly dependent on the activities of the building industry. After overall growth during 1999-2000, the construction market in Europe entered a phase of stabilisation in 2001 which is expected to last through 2002. Slow recovery is expected from 2003 onwards.

The slow pick-up in demand for certified wood products reflects the problems of supply. The impact of certification on world markets has been constrained by the difficulties in obtaining commercial quantities of certified wood at the right time and at the right price. However, certification markets are being transformed. Large volumes of certified wood from new certification schemes are about to enter the market. FSC will no longer be the only certification brand on offer and competition between certification schemes should heat up.

Trends
The following trends are discussed in more detail in Section 3.2:
- Development of forest certification and of forest and trade networks
- Dominance of temperate timber
- Marketing of lesser-known species (LKS)
- Development of plantations
- Genetic engineering
- Industrial building
- Do-It-Yourself
- E-commerce
- Engineered wood products

Production in the EU
Production of roundwood in the EU increased by 8 percent between 1999 and 2000 and amounted to 283 million m^2 in 2000. Removals in the leading producing countries Sweden, France and Germany increased, while production in Finland was fairly stable.

In 2000, the production value of the European wood-working industries was € 163 billion. During the last five years the sector has shown a rather strong performance with average annual growth of 5.0 percent. The biggest producing country is Italy accounting for 29 percent of total European production, followed by Germany (21%), France (9 %), the UK (11%) and Spain (8%). The Netherlands was among the smallest producers, accounting for only 2 percent of total production.

Imports
Between 1998 and 2000, value imports of timber and timber products by EU member countries decreased[1] by 5 percent. In terms of volume, however, imports increased by almost 20 percent. Germany is the leading importer of timber and timber products according to Eurostat data. However, according to ITTO data (see Appendix 2), Germany is not such an important importer of tropical timber. France is the leading importer of tropical logs (mainly from West Africa), while, besides France, Italy is also a leading importer of further processed tropical timber. The Netherlands is a leading importer of tropical sawn timber and the United Kingdom of tropical plywood.

Product groups in which the share of developing country suppliers is large are wooden frames, plywood, doors and continuously shaped wood (HS 4409).
In absolute value, the most important product group for developing countries is sawn timber.
Leading developing country suppliers of timber and timber products are Indonesia, Brazil, Malaysia, Cameroon, Côte d'Ivoire, Gabon, Slovenia, Croatia, China and Ghana

Exports
Between 1998 and 2000, exports of timber and timber products by EU member countries decreased in terms of value by 2 percent. In terms of volume, however, it increased by 16 percent. Sweden and Germany were the leading exporters, together accounting for around a third of the total exported value, followed by Finland, Austria, and France.

Trade structure
There is a general trend in the timber trade of direct buying by the timber dealer from the foreign seller, thus circumventing the importer. Thanks to improved communication facilities like Internet (e-commerce), this development will continue to expand over the coming years.

One important development is the creation of buying groups. The demand for FSC certified timber mainly comes from companies, which are often part of buyers' groups.

Opportunities for exporters in developing countries
The opportunities for exporters in developing countries discussed in Chapter 9 lie in the following fields: certified timber and timber products, lesser-known species, processed products, and e-commerce.

A new entrant to the EU market must recognise that competition from the often long-established suppliers is intense. Please also refer to CBI's EU Strategic Marketing Guide *"Timber and Timber Products"*, which provide exporters of timber and timber products in developing countries with practical steps for approaching the European market.

[1] *However, it should be noted that, although the US$ is the basic currency unit used to indicate the imported values, Eurostat trade statistics are expressed in E and transferred into US$. The developments in the imported values are therfore also influenced by the E / US$ exchange rate. Imported value in US$ declined, but imported value in E increased. Please refer to Appendix 2 for detailed import and export statistics.*

1 PRODUCT CHARACTERISTICS

Please note that the product groups falling under the HS codes presented in Section 1.2 are not completely in line with the product groups mentioned in Section 1.1. Moreover, different statistical sources use different product groups or specifications. This places limitations on in-depth interpretation of trade figures and of the possible relationships between import figures and production and consumption data.

1.1 Product groups

1.1.1 Logs

In HS codes, logs are indicated with wood in the rough (see HS code 4403). Very often, the rules specifying restrictions, allowances and tolerances are a matter of mutual consent between buyer and seller. Logs of West African origin are generally graded according to FAQ rules (fair average quality) i.e. 40% A, 40% B and 20% C in volume or to LM rules (*loyale et marchande*) i.e. 50% A, 35% B and 15% C in volume.
Logs of A quality have hardly any, or no, defects; B logs must yield a minimum of 50% of usable sawn timber, and C logs must give at least 30% of usable timber.

There are different methods for measuring logs; measure of the girth over or under the bark, the mean of the girth at top and bottom end or the mean of the cross diameter at both ends; note that the method to be applied should be stated in the sales contract.

The general length specification is 4.50 m. and up, but here again the sales contract should mention the length range. The log buyer likes to receive the longest length possible so that he can crosscut the logs to the requirements of his customers, thereby reducing the waste to a minimum.

1.1.2 Sawn timber

The sawn timber trade is divided into softwood (by far the major group in volume) and the hardwood trade. The variety in timber species is enormous and still increasing as a result of the promotion of lesser-known species. The leading suppliers of timber have their own grading rules and global harmonisation of these rules is still far away. The final use of the product will indicate which grading should be mentioned in the contract.

Sawn timber is traded air-dried or kiln-dried. Air-dried means that the timber has been exposed to the outside air under cover for a certain period. Kiln dried means that the timber has undergone a drying process in drying chambers. The kind of drying depends on the species and on the degree of humidity that the timber has to reach, which depends on its final usage.

The method of measuring sawn timber depends on the degree of humidity and processing. Kiln-dried and planed sawn timber is invoiced on the basis of exact measurements. Rough sawn timber of random specification has to have an over-measurement of 3 mm in thickness and width, and 50 mm in length.

The bundling of the sawn timber has to be both-ends flush for economic stowage in the vessel or in the container, thus keeping the transport costs to a minimum. If the contract specifies fixed lengths, the bundles have to be palletised.

1.1.3 Veneers

Veneers can be distinguished in sliced and peeled veneer. The former is always used for beautifying a surface, the latter mostly destined to manufacture panels for a wide range of applications.

Sliced veneer can be produced in very small thickness (from 0.25 mm) and comes from a great variety of timber species. It is traded in ‘books’ of 32 sheets.
It is obligatory that all sheets come from the same tree. Sliced veneer is graded into face and back veneer.

Peeled veneer is also produced from many different wood species. It is available in thicknesses of 1.2 mm to 6 mm. The price is much lower than that of sliced veneer. The veneers are graded into face, back and core veneer.

1.1.4 Wood-based panels

The application of wood-based panels is very wide, in interior as well as exterior use. The characteristics therefore vary with its final use. Environmental demands put high requirements on the composition of panels, in particular with regards to the contents of the glue, the emission of hazardous gases, and the type of preservatives.

Plywood

Plywood is manufactured by cross-lying of an uneven number of layers. The layers are not necessarily of the same timber species, although the more expensive plywood is made up of one species.
In general, plywood is produced in the sizes 244x122 cm, 250x125 cm and 305x153 cm, although there are very special sizes as well. The most popular thickness of the sheets is from 8 to 22 mm, but there are sheets for special purposes from 3 mm upwards and from 22 to 40 mm.
The main grading specifications for plywood are:

- MR: Moisture Resistant, plywood for interior use only.
- WBP: Water-Boil Proof, plywood for exterior use.

The major applications for plywood are:

Roof elements	Flooring	Wall panelling
Furniture	Packing	Shuttering
Coach bodies	Boat building	Exterior wall cladding
Prefab construction		

Blockboard
Blockboard is produced in thickness of 12.5 to 22 mm. General sizes are 244x122 and 183x305/520 cm. Blockboard is increasingly being substituted by MDF.

Blockboard is made up of two sheets of peeled veneer with a solid core of wooden strips. It is mainly used in furniture manufacturing, wall cladding, interior decoration and exhibitions/fairs. Its manufacturing demands extremely high accuracy of the sawing of the lats/strips to guarantee an absolutely even surface.

Particle board
Particle board is manufactured of small wood chips from thinnings, tree tops, waste from wood-processing plants and recyclable old timber. The chips are mixed with glue containing formol, which gives an emission of formaldehyde. Currently, most manufacturers produce boards with a low to zero emission level. Particle board is manufactured mainly in 250x125 cm, but also in larger sizes, and thicknesses from 8 to 70 mm. Its application is very wide.
The board is often treated with a fire-retarding chemical and a fungus protection.

MDF: Medium density fibre board
MDF production has developed very fast. It is produced in thicknesses from 1.8 to 70 mm and has gained a wide range of application. There is no standard size, but the usual one is 2.07x2.67/3.66/4.10/5.25 m.

It is composed of ground timber from the same sources as particle board. One of its attractive features is the ease in shaping its edges in soft-forming. Its application is steadily growing: traditionally it is used in furniture; currently it is used more and more in interior decoration, toys, picture frames, panelling, interior door and window frames. MDF is in many cases applied as a substitute for plywood.

HDF: High density board
HDF is produced in the size 244x122 cm and thickness of 1.2 to 8 mm. The standard thickness is 3.2 mm. It finds its application in furniture backs, as well as in packing.

OSB: oriented strand board
OSB is manufactured of flakes (strands) of about 12 cm long and 5 to 6 cm wide. Forest thinnings and tree tops as well as species of low market value (poplar) are the main raw material sources. The flakes are mixed with phenol or isocyanate which have no toxic emission. Special OSB panels are made with strands of 600 mm length.

OSB is produced in the size 244x122 cm and thicknesses of 6 to 22 mm. The most popular thicknesses are 9 and 18 mm.
OSB is available in four types:
OSB 1: for interior use under dry conditions, a low density panel designed for low-performance applications.
OSB 2: a non-conditioned building panel with clearly defined performance parameters
OSB 3: suitable for use in all heated buildings
OSB 4: a very strong, high density, engineered wood panel used for specific engineered purposes (i.e. as webbing and I-beams).

OSB has the advantage that it has a relatively low chemical content, which is a positive argument in the trend towards environmentally friendly building.

1.1.5 Mouldings
The variety of profiles is enormous, from simple to sophisticated. Some mouldings are covered with a primer, others are lacquered or covered with a foil or wood-veneer by the supplier. The execution of the moulding must be of the highest accuracy; in many cases accepted tolerances are not more than 0.1 mm. Mouldings have to be kiln-dried; generally to 14-16 percent, but for pictures frames the moisture content (MC) should be 8 percent.

The applications of mouldings are numerous in the building industry, as well as in furniture manufacturing. The application determines the quality demands. For instance: plinths which are painted may show sound sapwood; however, for wall cladding sapwood is sometimes allowed at the non-visible side only, while for high quality mouldings the product has to be fault-free. The sales contract should mention the tolerances in quality.

1.1.6 Doors and door frames
Outer doors (mostly panelled) are often made of solid tropical timber; inner doors are either flush doors or made in solid wood. A new trend is the inner door of which the panels are in MDF, plywood, or hardboard. Flush doors are made of two sheets of veneer with a core either of honeycomb, plain particle board or tubular particle board.

The construction of the door has to be solid.
The moisture content (MC) should be between 12-14 percent. The dowels must have the same MC.
The door components have to match in colour.
Doors which show great variations in colour or

sapwood must be offered as “paint quality”, but this qualification reduces the price.

The doors are manufactured from a wide range of species and are sometimes made from a mix of species.

Standard sizes for wooden doors in The Netherlands are:

Exterior doors	thickness:	38, 40 or 54 mm
	height:	201.5 and 211.5 cm
	width:	88 and 93 cm
Interior doors	thickness:	38 and 40 mm
	height:	201.5 and 211.5 cm
	width:	73-78-83-88-93 cm

Door frames can be made in soft or hardwood. Very often these frames are composed by lamination of finger-jointed strips. This type of manufacturing reduces the timber waste, since it can make use of short lengths, which by finger-jointing can be made up to full lengths. Moreover, the lamination increases the stability and allows the non-visible inner part to be of lower quality than the outer parts, thus leading to waste reduction. The lamination of door frames is subject to severe regulations. The glue has to be a thermoplastic PVAc or duroplastic.

Apart from a number of softwood and hardwood species from the temperate zone, there are many tropical species suitable for door manufacturing. Those belonging to durability Class I are:
- Afzelia Africana (Apa)
- Afzelia bipindensis (Doussié)
- Tieghemella heckelii (Makoré)
- Baillonella toxisperma (Maobi)
- Pterocarpus soyauxii (Padouk)
- Tectona grandis (Teak)
- Nauclea diderichii (Bilinga)
- Eucalyptus marginata (Jarrah)

Though very durable, Bilinga and Jarrah are less suitable on account of their instability.

Durable species belonging to class I/II and popular in the door industry are:
- Chlorophora excelsa (Iroko, Kambala)
- Intsia spp (Merbau)
- Bagassa guianensis (Tatajuba)

In the lower durability classes, Shorea spp (Meranti) class II/III is very popular. Entendophragma utile (Sipo) and Entendophragma cylindricum (Sapelli) of the same class are favoured as well, but are more expensive.

In order to achieve sustainable forest management, species which were previously left standing in the forest should be marketed as well. In order to obtain access to export markets for lesser-known species, they have to be submitted to tests to acquire the certificate of suitability in the building industry.

1.1.7 Windows and window frames
The imported tropical sawn timber is used for the greater part to manufacture windows and window frames. Just as for doors, the timber species used for windows in The Netherlands has to be accepted by KOMO certification so as to be applicable in the building industry and quality demands are very strict.

Window frames must be made by lamination and finger-jointing and the most popular sizes in The Netherlands are (planed):
44 x 116-140-165 cm
70 x 94-106-120-144 cm
94 x 120-144 cm

There is no harmonisation in the sizes of windows and window frames and they vary between EU countries.

Softwood is an accepted raw material for window manufacturing and can substitute hardwood in the majority of the applications, if it is treated properly.

Very popular tropical species for the manufacturing of windows are:
- Milicia spp. Iroko
- Shorea spp. Red meranti
- Intsia spp Merbau

Popular tropical species are:
- Entendophragma utile (Sipo)
- Entendophragma cylindricum (Sapelli)
- Afzelia spp

Less popular species are:
- Shorea spp Red Lauan
- Baillonela toxisperma Moabi
- Khaya spp Khaya
- Parashorea malanonan White seraya
- Cedrela odorata Cedrela (ceder)
- Hemonolobium spp. Sapupira
- Calophyllum ino. Bintangor

Just as for doors, new species can be submitted to tests by a special commission (Stichting Keuringsbureau Hout) to investigate if they are suitable for window and window-frame manufacturing.

1.1.8 Parquetry
Parquet is mainly manufactured in hardwood, but softwood, veneered plywood, particle board and MDF are also used. It is produced in planks, strips sometimes composed in wider planks, prefab parquet with tongue and groove (T&G) on all four sides which the handyman can lay himself, tiles made up of various

mosaic designs and laminated parquet of which the core is high density board. It is imported untreated or lacquered, ready to lay or stained, staining being sometimes applied to rubberwood parquet.

Parquet is manufactured in thicknesses of 4 to 23 mm, in wide as well as in narrow strips of 5 to 20 cm and in a great variety of lengths. Parquet and timber for parquet must have a moisture content of 8 percent.

The variety of parquet is enormous.

Parquet is made in many types of species. In softwood, various pine species (pitch, yellow, oregon), spruce and hemlock are suitable for parquet. However, most wooden flooring is in hardwood. The most used temperate species are oak, beech, red alder, birch, ash, cherry, chestnut, walnut and hard maple.
The range of species of tropical hardwood is very large:

Afrormosia	– Pericopsis elata
Apa	– Afzelia pachyloba
Afzelia (Doussié)	– Afzelia bipindensis
Azobe	– Lophira alata
Balau (red and yellow)	– Shorea spp.
Basralocus	– Dicorynia guianensis
Bilinga (Opepe)	– Nauclea diderrichii
Bubinga	– Guibourtia demeusii
Gerutu	– Parashorea spp.
Guatambu	– Balfourondendron
Iroko (Kambala)	– Chrlorophora excelsa
Jatoba	– Hymenaea spp.
Kapur	– Dryobalanops spp.
Keruing (Yang)	– Dipterocarpus spp.
Khaya	– Khaya spp.
Mahogany	– Swietenia macrophylla
Makore	– Tieghemella heckelli
Mansonia	– Mansonia altissima
Mengkulang	– Heritiera spp.
Merbau	– Intsia spp
Moabi	– Baillonella toxisperma
Movingui	– Distemonanthus benth.
Mutenye	– Guibourtia arnoldiana
Ovangkol	– Guibourtia ehie
Padouk	– Pterocarpus soyauxii
Panga panga	– Miletia sthlmanii
Rubberwood	– Hevea brasiliensis
Sapelli	– Entandophragma cyl.
Sipo	– Entandophragma utile
Sucupira	– Bowdichia nitida
Tatajuba	– Bagassa guianensis
Teak	– Tectona grandis
Wengé	– Millettia laurentii

Some of these species are only used in industrial flooring. Nowadays bamboo is another raw material of which parquet is made, but since it is not a timber it falls outside the scope of this survey.

1.1.9 Stairs

Current sizes for the Dutch market are 44x125-150-225-300 mm. However, the variety in models of stairs is big. There is no standardisation and stairs are mostly tailor-made.

1.1.10 Building material components

Mouldings, door frames, windows and window frames, stairs and staircases and a great deal of the parquetry, are imported in unfinished or semi-finished stages. This even applies to doors, which are imported without glass, locks and the other hardware. The development of techniques in the producing countries will gradually increase the level of processing. The components that are currently imported will become the ready-for-consumption product in the near future.

It should be noted that building materials are subject to EU Construction Products Directive 89/106/EEC which states the essential requirements viz.:
- Mechanical resistance
- Fire safety
- Hygiene, health and environmental protection
- Safety in use
- Protection against noise
- Energy economy
- Heat retention

Impregnation, required for some species, falls under this Directive. The species are divided into five risk classes according to the European norm EN 335-1.

There are variations in the application and the way of application of the kind of chemicals allowed for the different species and their different purposes.
It is important to obtain detailed indications from the importer on the subject, in order to avoid refusal of entrance in the country of destination.

1.1.11 Miscellaneous

There is a trend to replace common tropical timber species with lesser-known species with similar specifications regarding wooden frames for pictures, paintings, photographs and mirrors. Only small sizes are required, therefore providing opportunities for better recovery from forest resources.

Please note that the furniture industry and wooden packaging materials will not be discussed in this survey. Please refer to CBI's EU Market Survey Domestic Furniture and CBI's Market survey "Packaging Materials". Wooden packaging materials as such are hardly imported directly from developing countries.

However, they are used to package export products from developing countries. Marketing of wooden packaging materials should therefore be aimed at the local market. The packaging materials have to respond to the following conditions:
- they should not be heavier than necessary (choice of timber species)
- the packaging should be made in relation to weight of the contents
- the packaging must be able to stand transportation so that products arrive undamaged.

1.2 Customs/statistical product classification

On January 1, 1988, a unified coding system was introduced to harmonise the trading classification systems used world-wide. This system is called the Harmonised Commodity Description System (HS) and was developed by the World Customs Organisation (WCO). The system comprises about 5,000 commodity groups, each identified by a six digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification. The system is used by more than 177 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics.
WCO is currently introducing alterations to the HS and these were intended to be included in the combined nomenclature as of January 1, 2002. After the six-digit code, countries are free to use further subheadings.
In the trade data of Eurostat, an 8 digit system is used. Most codes, however, end with two zeros, i.e. effectively only using 6 digits. In some countries even 10 digits are sometimes used.

Table 1.1 gives the four-digit list of the main HS codes for timber and timber products.

The HS codes and product descriptions have failed to keep up with changes in the goods and trades they refer to and are often now antiquated and inaccurate.
The aim of the World Customs Organisation is to make the whole structure simpler and more relevant.

TRADA, the British Timber Research and Development Association, has been heavily involved in the revision of Chapter 44 and believes the root of the problem is the product descriptions.

Although the whole of Chapter 44 needs revising, the sections of greatest concern relate to hardwood, softwood and panel products. With support from the timber trade and others, the Business Solutions Group of TRADA Technology has now lodged proposals for wholesale change with the European woodworking body (CEI-BOIS) for consideration by the various Eurostat and Customs committees.

Recommendations based on ‘trade practice’, following industry consultation, have been developed and these will enable the trade to define, record and more effectively use data generated by import statistics.

Table 1.1 HS code classification of timber and timber products

HS codes	Products
4403	Wood in the rough, whether or not stripped of bark or sapwood, or roughly squared
4407	Sawn wood
4408	Veneer sheets and sheets for plywood
4409	Wood continuously shaped (tongued, grooved, rebated, chamfered, V-jointed, beaded, moulded, rounded, or the like) along any of its edges or faces, whether or not planed, sanded, or fingerjointed
4410	Particle board
4411	Fibreboard
4412	Plywood, veneered panels and similar laminated wood
4413	Densified wood, in blocks, plates, strips or profile shapes
4414	Wooden frames for pictures, paintings, photographs, mirrors, etc.
4418	Builders’ joinery and carpentry or wood, including cellular wood panels, assembled parquet panels, shingles and shakes

2 INTRODUCTION TO THE EU MARKET

The European Union (EU) is the current name for the former European Community. Since 1 January 1995, the EU has consisted of 15 member states. Negotiations are in progress with a number of candidate member states, many of which already have extensive trade and co-operation agreements with the EU. It is envisaged that five of these countries will become members in 2004.

According to the first demographic estimates for 2001, published on January 11, 2002 by Eurostat, the population of the EU on 1 January 2002 was expected to total 379.4 million. While the pace of population growth in the EU has slowed greatly in the last 30 years, the increase of 0.4% in 2001 was slightly higher than the figure in recent years. Total GDP in 2000 equalled US$ 7,856.6 billion (€ 8,827.6 billion) at current prices, while the average GDP per capita (at current exchange rates) amounted to US$ 20,759 (€ 23,325) in 2000 (OECD, 2002).

The most important aspect of the process of unification (of the former EC countries) which affects trade is the harmonisation of rules in the EU countries. As the unification allows free movement of capital, goods, services and people, the internal borders have been removed. Goods produced or imported into one member state can be moved around between the other member states without restrictions. A precondition for this free movement is uniformity in the rules and regulations concerning locally produced or imported products. Although the European Union is already a fact, the regulations have not yet all been harmonised. Work is in progress on uniform regulations in the fields of environmental pollution, health, safety, quality and education.

On January 1, 2002 the euro (€) became the legal currency used in 12 EU member states. It had already been in use since 1 January 1999, by banks as legal currency in eleven EU member states: Austria, Belgium, Finland, France, Germany, Italy, Ireland, Luxembourg, The Netherlands, Spain, and Portugal. Greece joined the Economic and Monetary Union (EMU) on 1 January 2001.

The most recent Eurostat trade statistics quoted in this survey are from the year 2000. In 1998, the European Currency Unit (ECU) was still used as a monetary instrument by financial institutions to simplify financial procedures. On 1 January 1999, statistical and contractual values in ECU were converted into euros on a 1:1 exchange rate. The € / US$ exchange rate currently (April 2002) stands at around US$ 0.89 for one euro.

The US$ is the basic currency unit used to indicate value in this market survey. The Eurostat trade statistics are based on the € values and transferred into US$ with the exchange rates presented below.

Trade figures quoted in this survey must be interpreted and used with extreme caution. The collection of data regarding trade flows has become more difficult since the establishment of the single market on 1 January 1993. Until that date, trade was registered by means of compulsory Customs procedures at border crossings, but, since the removal of the intra-EU borders, this is no longer the case. Statistical bodies like Eurostat cannot now depend on the automatic generation of trade figures. In the case of intra-EU trade, statistical reporting is only compulsory for exporting and importing firms whose trade exceeds a certain annual value. The threshold varies considerably from country to country, but it is typically about € 100,000.
As a consequence, although figures for trade between the EU and the rest of the world are accurately represented, trade within the EU is generally underestimated.

The following chapters focus on the EU markets for timber and timber products. Markets of selected EU

Exchange rates of EU currencies in US$

Country	Currency	1997	1998	1999	2000	2001	Apr. 2002
European Union	ECU	1.13	1.12	-	-		-
	€	-	-	1.06	0.92	0.89	0.89
Denmark	Dkr	0.15	0.15	0.13	0.12	0.12	0.12
Sweden	Skr	0.13	0.13	0.12	0.11	0.10	0.10
United Kingdom	GB£	1.64	1.66	1.62	1.51	1.44	1.46

Source: CBS Statline (May 2002)

countries are highlighted, since their markets are relatively more important than the markets of other EU countries in terms of production, consumption, imports and exports. By analysing these aspects of the market, the competing countries and countries with opportunities for developing countries are determined. This survey focuses mainly Germany, France, the United Kingdom, The Netherlands and Italy.

3 CONSUMPTION

3.1 Market size

As a whole, the market still appears to be short on confidence, because major customers continue to put large projects on hold in the light of economic uncertainty and the after-effects of the September 11, 2001 terrorist attacks. The marketplace is highly competitive. Sales of hardwood are sporadic, resulting from acute supply problems in the east Malaysian state of Sabah. Moreover, first quarter demand for African species throughout most of Europe is described as slow.

The prices of several North American hardwoods have increased and, in the longer term, a number of hardwood experts expect European hardwoods to offer ever-growing competition to North American species. There is an increasing level of offers on eastern European oak of good quality. Supply is still hampered in many cases by a bad infrastructure.
As for softwood, supply is poor as a result of adverse logging conditions caused by mild weather in northern Europe. This condition is expected to create shortages and to have a direct effect on prices.
The economic outlook in Europe is increasing which is expected to bode well for wood products demand and commodity prices. Furthermore, the industry is actively promoting timber as an environmentally friendly material, in order to increase demand.

The conclusion at the European Wood Day, organised in March 2002, by CEI-Bois, was that the European timber industry has enormous potential, but needs greater international collaboration and improved communications to achieve it. Stakeholders must step beyond company boundaries for the common benefit of the industry.

The European Union market

Good sources for European market information are www.unece.org/trade/timber/mis/mis.htm and www. ttjonline.com.

Roundwood

The demand for roundwood[2] in West European countries is increasingly dominated by an ever smaller number of large wood-processing companies.
This leads to weaker pricing power of the traditional small, private and municipal forest owners and state forest services. Between 1997 and 1999, the apparent consumption[3] of roundwood in the EU/EFTA region increased only marginally. However, between 1999 and 2000, there was significant growth of 3.3 %.

Log exports are decreasing as tropical timber producers add value domestically. Many countries put extra levies or duties on round logs for export to discourage unprocessed exports. The contribution of logs to total tropical timber exports by ITTO producers has fallen dramatically from over 60 percent in 1980 to less than a quarter in 1999. Only Africa continues to export a higher volume equivalent of logs than processed products. The Asia Pacific region is rapidly replacing log exports with the export of processed products. In 1998, EU countries accounted for some 20 percent of global log imports, with France being the leading EU importer. More than 90 percent of logs imported into the EU originates in West Africa (mainly Gabon, Cameroon and the Republic of Congo).

Please refer also to Appendix 2 for ITTO data on production, import, export and consumption of logs, sawn timber, veneer and plywood.

Sawn timber

The majority (in 2000: 94%) of EU sawn timber consumption consists of softwood. Between 1999 and 2000, the consumption of sawn softwood was also growing faster than that of sawn hardwood. Nonetheless, The Netherlands and the United Kingdom show some remarkable growth rates in consumption of sawn hardwood.

Table 3.1 Apparent consumption sawn softwood, in 1000 m^3

	1999	2000	% change from 1999 to 2000
EU	71,268	74,870	5.1
Germany	17,571	17,137	-2.5
France	9,174	10,656	16.2
UK	8,885	9,512	7.1
Italy	6,230	7,013	4.5
Austria	5,034	5,468	8.6
Sweden	3,686	3,839	4.2
Finland	4,660	5,178	11.1
Denmark	4,752	4,697	-1.2
Spain	4,038	4,294	6.3
Netherlands	2,832	2,559	-9.6

Source: ECE/FAO Forest Products Annual Market Review, 2000-2001

2 *According to the definition of the European Economic Commission, this includes industrial wood in the raough and fuelworld.*
3 *Apparent consumption = Production+Imports-Exports*

Table 3.2 Apparent consumption sawn hardwood, in 1000 m³

	1999	2000	% change from 1999 to 2000
EU	13,290	13,405	8.4
France	2,980	3,585	20.3
Italy	2,793	2,749	-1.6
Germany	1,874	1,793	-4.3
Spain	1,902	2,024	6.4
Netherlands	701	976	39.3
UK	613	748	22.0

Source: ECE/FAO Forest Products Annual Market Review, 2000-2001

Wood-based panels

According to the definition of the European Economic Commission, this includes veneer sheets, plywood, particleboard and fibreboard. ECE does not provide figures on veneer sheets. Consumption of particleboard is the highest of the three products for which data are available. However, particle board also includes non-wood particle board.

Between 1999 and 2000, EU consumption of wood based panels increased. In the fibreboard segment the increase was the most pronounced (+13.3%). Consumption of plywood and particle board increased by 6.1% and 5.4% respectively.

Table 3.3 Apparent consumption particle board, in 1000 m³

	1999	2000	% change from 1999 to 2000
EU	27,226	28,707	5.4
Germany	9,417	9,615	2.1
Italy	3,340	3,423	2.5
Spain	2,964	3,578	20.7
UK	3,264	3,534	8.3
France	3,004	3,131	4.2
Belgium	1,018	1,049	3.0
Denmark	701	949	35.4
Sweden	615	717	16.6
Netherlands	668	668	0.0

Source: ECE/FAO Forest Products Annual Market Review, 2000-2001

Table 3.4 Apparent consumption plywood, in 1000 m³

	1999	2000	% change from 1999 to 2000
EU*	5,515	5,853	6.1
Germany	1,225	1,225	0.0
UK	950	1,012	6.5
Italy	678	726	7.1
France	668	683	2.3
Netherlands	510	510	0.0
Spain	467	484	3.7

** Excluding Luxembourg*

Source: ECE/FAO Forest Products Annual Market Review, 2000-2001

Table 3.5 Apparent consumption fibreboard, in 1000 m³

	1999	2000	% change from 1999 to 2000
EU*	8,364	9,473	13.3
Germany	1,987	2,455	23.6
UK	1,232	1,463	18.8
Italy	1,181	1,203	1.9
Spain	1,082	1,087	0.5
France	654	934	42.8
Netherlands	427	427	0.0

** Excluding Luxembourg*

Source: ECE/FAO Forest Products Annual Market Review, 2000-2001

According to ITTO's Tropical Timber Market Report of March 2002, the particleboard market in central Europe still does not show signs of improvement. Unchanged weak demand is weighing heavily on producers but, despite the weak demand, production volumes seem to be rising. As from end-March 2002, the industry is expecting further weakening amongst the buyers.

European sales and export of MDF in 2001 increased by 10 percent. For 2002, EPF expects a growth of consumption of 6 percent. MDF sales will pass 10 million m³.

European OSB consumption grew by a comparable rate of 29% to 1.4 million m3. Growth was seen in all areas of application developed so far for OSB. Imports of OSB into Europe are still negligible, according to EPF.

The European Panel Federation (EPF) publishes an annual report on the particleboard, MDF and OSB industries in the EPF member countries.
The report can be ordered via www.europanels.org and the price is € 500.

Laminate flooring
According to estimates of the European Producers of Laminate Flooring (EPLF), the total West European Market sales of laminate flooring amounted to 200 million m^2 in 2001. The Western European market accounts for 55 percent of global sales in m^2.

The markets of Germany, the United Kingdom and France are the top three in the European sales of laminate flooring, accounting for two thirds of the total - also in this order, with Germany in a dominant leading role. At some distance, the next leading markets are The Netherlands, Belgium and Austria. Due to the globalisation of the laminate flooring market, European countries increasingly support or have shares in production sites outside of Europe.

Parquetry
According to ITTO's Tropical Timber Market Report of March 2002, it is the opinion of most European parquetry producers that the competitive pressure on the markets for parquetry has increased again.
Because of unchanged high stocks, consistently high production activities and weak demand in the European markets, prices have come under growing pressure in the weeks preceding the report, especially for standard qualities of prefabricated parquetry. In the opinion of analysts, in the first two months of 2002 sales and prices in the German market especially were affected even more by the introduction of new systems for the gluefree laying of three-ply prefabricated parquetry.

Parquet consumption increased by 8.7 percent in 2000 in the countries represented by the European Federation of the Parquet Industry [4]. In 2000, consumption of parquet flooring in the FEP countries amounted to 80.6 million m^2. Germany accounts for the major share with 30.8 percent (29.4% in 1999), followed by Italy with 13.6 percent (13.8%), Spain with 13.2 percent (13%), France with 9.4 percent (9.6%) and Austria with 6.8 percent (7.8%). The Netherlands accounts for only 4.4 percent of consumption.

Because of different growth rates for production and consumption, the gap between these two parameters increased in 2000. To fill this gap, the FEP countries had to import more parquet in 2000 than ever before.

[4] *These include: Austria, Belgium, Switzerland, Sweden, Norway, Denmark, Finland, The Netherlands, Italy, France, Spain and Germany.*

The leading wood species used in parquet are oak (43%) and beech (22%). Tropical species account for 14%.
In 2001, Intercontuft valued the total European flooring market in Europe (EU and EFTA) at 1.6 billion m^2. Parquet is estimated to have a market share of about 5.6 percent.

EUWID is reporting that, according to the Federation of the European Parquet Industry (FEP) in Brussels, 2001 demand in the Western European parquetry markets weakened for the first time, whereas in the past years parquetry consumption had risen steadily in Western Europe. Demand in Germany as well as in Finland weakened considerably in 2001. There was a brighter picture in some countries in Northern and Southern Europe. For Great Britain, Ireland, Spain, and Italy the European association is expecting to report market growth rates in the range of 5 to 10%.
Sales in France and in the Scandinavian countries are about the same as one year ago, according to FEP.

Windows
In 2000, West European countries used 87.8 million window units (1 unit = 1.69 m^2), representing a small growth compared to 1998. Some 31 percent of the window frames was of wood. Germany is by far the largest market accounting for almost 20 million units. It is followed by the UK (13 million), and Spain (10 million). The Netherlands used 3 million window units.

Certified timber
To some extent, the slow pick up in demand for certified wood products reflects the problems of supply. The impact of certification on world markets has been constrained by the difficulties in obtaining commercial quantities of certified wood at the right time and at the right price. This has acted as a brake on the marketing efforts of those promoting certified products.
The most recent figures issued by the Forest Stewardship Council (FSC), the only organisation that has so far marketed significant volumes of certified wood, indicate that around 25.3 million ha are recognised under the scheme worldwide. Based on FAO forest area data, FSC certified forest area amounts to only 0.5 percent of total world forest area.

However, certification markets are being transformed. Large volumes of certified wood from new certification schemes are about to enter the market. FSC will no longer be the only certification brand on offer and competition between certification schemes should heat up. Forest certification will become supply-driven rather than market-driven, as suppliers that have gone to the expense of developing and implementing certification schemes, seeking to cash in through increased marketing and promotion.

Germany

Consumption

- In 2000, Germany continued to be the leading EU consumer of sawn softwood. However, consumption decreased by 2.5 percent between 1999 and 2000.
- Considering the size of the country, Germany is not using much sawn hardwood. In 2000, it was only the 4th leading EU consumer of sawn hardwood.
- In 2000, Germany was the leading EU consumer of wood-based panels.
- Germany is the largest EU market for parquetry and windows of all materials. Parquetry consumption shows an upward trend. Total window consumption (of PVC, aluminium and wood), on the other hand, shows a decreasing trend.
- According to ITTO data, Germany was a small consumer of tropical timber in 2000 compared to the other countries highlighted in this survey.

Please refer to Tables 3.1 to 3.5 for growth figures for sawn softwood and hardwood and the different type of wood-based panels.

The German timber and furniture industry association (VDHM) reported a tunrover increase of 1.7 procent in 2000. The refining companies and board producers particularly saw their turnover grow strongly by 9.2 percent and 6.7 percent respectively.
Manufacters of wooden building components saw their turnover decrease by 1 percent as a result of decreasing building activities.

Construction

After suffering badly in the recession of the early 1980s, construction grew strongly in 1989-95. However, oversupply of housing, the end of tax incentives, and public spending controls led to a steep decline in construction output after 1995. The German wood industry went through a consolidation process. More and more companies in the German wood and furniture industry shifted their production to outside Germany, with central and eastern Europe being the preferred new locations.

Currently, the construction sector in Germany is in a recession. Nonetheless, the share of the timber frame construction in Germany increased between 1995 and 1999.

FSC wood

As in other EU markets, FSC certified wood is becoming more important in the German market.
In the districts Kreis Oder-Spree and Ostbrandenburg, tropical timber can only be used in construction if an FSC certificate or another certificate recognised by environmental groups is available. There is not much certified timber available locally in Germany as there is only 314,635 ha. certified (13 March, 2002).

The wood industry is, however, not strongly involved as yet. In 2001, the VHI (Verbandes der Deutschen Holz-werkstoffindustrie) boycotted a meeting with WWF about FSC certification.

Internet information

The Internet site of the Gesamtverband Holzhandel e.V. (www.bdholz.de) is a good entry for finding trade partners in Germany. It includes a database of German importing and exporting companies.

If you visit www.holz-zentralblatt.com you can find current news about the German market.

France

Consumption

- In 2000, France was the leading EU consumer of sawn hardwood.
- In 2000, France was the second leading EU consumer of sawn softwood.
- Compared to other big countries in the EU, France does not consume much wood-based panels.
- The French market for parquet flooring is smaller than that of Germany, Italy and Spain.
- Total window consumption (of PVC, aluminium and wood) shows an increasing trend.
- According to ITTO data, France was the leading consumer of tropical timber in 2000. However, almost 50 percent of consumption consists of logs.

Please refer to Tables 3.1 to 3.5 for growth figures for sawn softwood and hardwood and the different type of wood-based panels.

Construction

The forecast for growth in the construction output in France for 2000 was one of the highest for the national markets described in this section. However, growth was expected to have slowed down significantly in 2001, increasing to just above the growth expectation for the EU. The construction sector uses about 60 percent of the timber consumed, of which two-thirds consists of sawn timber and one-third of panels. The construction of timber frame housing in France is rapidly increasing, as is the utilisation of wood in housebuilding.
Timber frame construction in France has been at the low level of 15,000 units a year, while in 2000 it had grown to 25,000.

FSC wood

There is a WWF Forest Trade Network in France.
This group consists of 11 members that are committed to purchasing forest products from well-managed forests and to supporting independent certification.
At present, only the FSC meets the requirements of WWF for a credible independent certification scheme.
The group includes the 2nd retailer in the world

(Carrefour) and one of the biggest European DIY chains (Castorama). Forested land under FSC certification in France is minimal at 15,363 ha.
The French government is discussing a forest law that was presented to Parliament in 2000, with the objective of giving a new impulse to sustainable forest management in France.

Internet information
The Internet site www.boisforet.info is a good information source on the French market, including information on industries using timber, technical specifications, quality and standards. The site provides a number of interesting links including www.foretpriveefrancaise.com. Another interesting site is http://www.site-en-bois.net.

United Kingdom

Consumption

- In 2000, the UK was the third leading EU consumer of sawn softwood.
- Considering the size of the country, the UK does not use much sawn hardwood. In 2000 it was only the sixth leading EU consumer of sawn hardwood.
- In contrast to ECE data of the previous year, consumption of wood-based panels in the UK showed an increase in 2000.
- The UK is not a member of the European Federation of the Parquet Industry, so data on parquetry are not available.
- Total window consumption (of PVC, aluminium and wood) shows an increasing trend.
- According to ITTO data, the UK hardly imported any tropical logs in 2000. The consumption by the UK of tropical timber consists of more up-stream processed products.

Please refer to Tables 3.1 to 3.5 for growth figures for sawn softwood and hardwood and the different type of wood-based panels.

Construction
Growth in the construction output in the UK for 2001 is estimated at 3.4 percent. Forecasts for 2002 and 2003 are 2.4 percent and 2.8 percent respectively.
Timber frame in the UK accounts for some 10 percent of new house-building. It is expected that the use of timber will increase over the coming years. The major house-builders are increasingly realising the commercial advantages and the housing associations like it for a variety of reasons: the environmental aspect, speed of construction and the fact that many of the components can be sourced in the UK.

FSC wood
The UK is among the world's largest markets for certified wood. The WWF 95+Group is a partnership between WWF and companies and organisations in the UK, committed to purchasing increasing proportions of their timber and paper requirements from independently certified sources. At this time, only the FSC meets the requirements of WWF for a credible independent certification scheme.

The WWF 95+Group consists of over 100 members, with a total turnover of wood products of around £ 4 billion. The trade by this Group amounts to over 20 percent of total UK wood consumption. The total volume of wood traded amounts to 10 million m? and the number of countries supplying FSC wood to the Group amounts to 30. One of the leading members of the group is the world's third largest retailer of wood and building products B&Q. Demand is concentrated in the DIY retailer and public procurement sectors, whereas it is much weaker in the construction, joinery and furniture sectors.

In 1990, the Timber Trade Federation initiated 'Forests Forever'. This independent, voluntarily funded body represents the views of all timber and wood using industries in the UK on environmental issues. Forests Forever's aim is to help safeguard the forests of the world and Britain's future timber supplies as well as to promote wood as an environmentally friendly material. For more information, please refer to www.forestsforever.org.uk.

Wood for good campaign
The Wood for good campaign is the largest single timber industry promotion ever mounted in the UK, and will be targeting both trade and consumer audiences.

It is funded by the experts in the industry including the Nordic Timber Council, the Forestry Commission, the Timber Growers Association, the UK Sawn Wood Promoters, the Timber Trade Federation and the Northern Ireland Forest Service.

The three-year campaign will aim to:

- increase the consumption of wood
- change perceptions about wood
- encourage its use in interior and exterior design, and building
- tackle issues surrounding the use of wood
- encourage good practice in the industry.

Internet information
The Internet site www.ttjonline.com is a good information source on the UK and other markets.

Italy

Consumption

- In 2000, Italy was the fourth leading EU consumer of sawn softwood.

- Italy is the second leading EU consumer of sawn hardwood.
- Italy is the second leading EU consumer of parquetry.
- Total window consumption (of PVC, aluminium and wood) is quite stable.
- Italy is the leading consumer of up-stream tropical timber (excluding logs, including sawn timber, veneer and plywood).

Please refer to Tables 3.1 to 3.5 for growth figures for sawn softwood and hardwood and the different type of wood-based panels.

Construction
The forecast for growth in the construction output in Italy for 2002 is low and decreasing in comparison with 2001.

FSC wood
Established in 2001, the Italian Forest and Trade Network currently comprises of 10 members. These members include retailers (COOP, the biggest Italian supermarket chain), DIY and furniture companies, a picture frames manufacturer, a handmade furniture workshop and one association for the small furniture industry.

Internet information
The Italian based www.timberandmore.com provides information on Italian and other markets.

The Netherlands

Consumption
- The Netherlands is a relatively small consumer of sawn softwood and between 1999 and 2000 consumption decreased by almost 10 percent.
- Considering the size of the country, The Netherlands is a big consumer of sawn hardwood. Between 1999 and 2000 consumption increased by almost 40 percent.
- Consumption of wood based panels is now stable, after increases in previous years.
- Considering the size of the country, The Netherlands is a big consumer of sawn tropical timber. Its consumption in 2000 was higher than that of Germany and that of the UK.

The use of wood in The Netherlands by application is as follows: paper and carton (50%), sawn timber (29%), wood-based panels (15%), other (6%).
Please refer to Tables 3.1 to 3.5 for growth figures for sawn softwood and hardwood and the different type of wood-based panels.

Construction
The construction output in The Netherlands decreased by 2 percent in 2001 and is forecasted to decrease further in 2002. House construction in 2001 was around an extreme low of 65,000 houses, while in 2002 a number of 60,000 is expected. In comparision, in 1998 over 90,000 houses were constructed. It is expected that construction in 2003 will increase again by 1.5 percent.

FSC wood
There is a Forest and Trade Network in The Netherlands, called Stichting Goed Hout (Foundation Good Wood). The Network consists of 51 members including forest owners, timber importers, retailers and conservation organisations. In 2001, there was 560,000 m^3 of FSC-certified timber on the Dutch market, about 7 percent of total timber consumption. The Foundation believes that the availability of FSC-certified wood products on the Dutch market can be increased to 50 percent of total consumption by 2006 if certain conditions, including government backing, remain firm.

Internet information
The Internet sites www.nijgh.nl/houtwereld and www.sbh.nl provide information on The Netherlands market.

3.2 Market segmentation

The most important market segments for timber and timber products are the:
- Construction sector
- DIY trade
- Furniture trade

Other segments for timber and timber products include: garden article trade, household article trade, packaging materials trade, pulp and paper trade, and the trade in tools, brushes, brooms, sticks. Except for pulp and paper, these segments are small in terms of volume.

Construction sector
The construction sector includes the following segments: public construction, utility constructions, residential buildings, renovation/maintenance/extension works. Timber consumption is greatly dependent on the activities of the building industry. In the United Kingdom, for example, the construction sector uses about 60% of the timber consumed and timber frame construction is gaining in importance.

According to Euroconstruct, after the overall growth of approximately 6 percent during 1999-2000, the construction market in Europe entered a phase of stabilisation in 2001, which is expected to last through 2002. Slow recovery is expected from 2003 onwards. This phase of stabilisation in the market is basically due to three factors:
- The overall economic slowdown, which has weakened the confidence of consumers and firms;
- The crisis in new construction, especially in the residential sector;

- The recession phase in the construction sector in two of the largest European markets: Poland and Germany.

DIY trade
The DIY market has become strong in the last few years (see Section 3.3). Around 6 percent of the timber sold in the DIY stores consists of FSC certified timber. Leading suppliers of certified timber are Sweden and the USA. Currently, there is not much on offer from developing countries. DIY stores in The Netherlands do sell some smaller timber articles from the Solomon Islands.
In September 2001, Consumer Goods Europe published a Sector Review on DIY covering five main European markets.

Other
Wooden packaging materials as such are hardly imported directly from developing countries. However, they are used to export products from developing countries. Marketing of wooden packaging materials should therefore be aimed at the local market.

Please note that the segments furniture, wooden packaging materials, garden articles, household articles and pulp and paper, tools, brushes, brooms, sticks will **not** be further discussed in this survey.

Please also refer to CBI's EU Market Survey Domestic Furniture and CBI's Market survey "Packaging Materials".

3.3 Consumption patterns and trends

Timber consumption is greatly dependent on the activities of the building industry, which in turn is closely related to economic growth. For the short-term, a slow-down of the construction sector is expected. Nevertheless, timber is increasingly used in the construction sector. According to FAO, the demand for wood will increase at the same level as the global population. Around 2010, the demand for wood will have increased by 50 percent.

As from mid-2000, the EU economy started to slow down. While in 2000 EU GDP growth still amounted to 3.4 percent, the rate had fallen to 1.7 percent in 2001. GDP growth in Spain, France and the UK was higher than the EU average growth rate, the GDP growth of the Netherlands and Italy was about the same as the EU average, while growth in Germany was significantly lower than the EU average. GDP growth in the EU is predicted to be stable and the forecast for 2002 is a growth rate of 1.8 percent.

The Netherlands government is promoting the use of renewable resources. In 1995, it started a programme aiming to increase the use of wood in the construction sector by 20 percent, in comparison to the amount used in 1990. The government policy for the period 2000-2004 is sustainable construction and focuses explicitly on the use of sustainably managed timber.

Forest certification
Forest Certification is a system of forest inspection plus a means of tracking timber and paper through a "chain of custody" – following the raw material through to the finished product. This is to ensure that the products have come from forests, which are well managed - meaning that they take into account environmental, social and economic principles and criteria.

There is a number of organisations which have their own criteria and indicators for sustainable forest management. The leading schemes are the Pan European Forest Certification Scheme (PEFC) and the scheme of the Forest Stewardship Council (FSC). The EU market is the leading market for certified timber and the Economic Commission for Europe (ECE) expects competition between the industrially introduced PEFC label and the FSC label introduced by environmental organisations.

To date, more than 25 million hectares of forest in 35 countries have been independently certified under the FSC certification scheme and more than 20,000 products carry the FSC label. Seven per cent of the world's industrial wood consumption is FSC certified.
Three of the five largest wood buyers in the world – Lowes, The Home Depot and IKEA – already actively support FSC. AssiDomän, the world's largest private forest owner, has all its Swedish forests FSC certified.

WWF Global forest and trade network
The demand for FSC certified timber mainly comes from companies, which often are members of buyers' groups. Regional and national Forest and Trade Networks are now established in Europe, North America, South America and Australia. These networks consist of organisations and companies committed to producing and purchasing forest products from well-managed forests and to supporting independent certification.
At present only the FSC meets the requirements of WWF for a credible independent certification scheme.

Forest and Trade Networks in Europe are located in Belgium, France, Germany, Ireland, Italy (in development), The Netherlands, Sweden (for the Nordic countries), Spain and the United Kingdom. Please refer to www.panda.org/forests4life/certify_ftn .cfm for more information.

Nearly seven hundred companies with an annual turnover of US$ 180 billion support FSC as members of the WWF Global Forest and Trade Network – either by producing FSC timber or goods, or buying them whenever possible. In March 2002, the East Asian Forest and Trade Network, covering Hong Kong, China, Taiwan and South Korea, was established.

Dominance of temperate timber
There is an increasing preference for temperate timber and the Nordic countries (e.g. Sweden, Finland) dominate the market. Tropical sawn timbers account only for a small share of total trade in sawn timber and their share is on the decline. Tropical sawn timber continues to face strict environmental criticism in some of the big export markets. It is expected that some of the leading timber exporters such as Malaysia, Indonesia and Brazil will continue to cut their exports of primary products in the future because of the growing domestic consumption, and due to the expansion of further processing for exports.

Lesser-known species (LKS)
One of the major constraints on the development of sustainable forestry management is the fact that western markets use only a very limited number of wood species. It is better for the forest if a substantial number of species can be harvested. This reduces the harvest per species through which the species richness can more effectively be kept intact. At the local market level, there is some experimentation with lesser-known species. Mil Madeira in Brazil is marketing garden furniture, trays and vacation homes on the South American market, using lesser-known species.

In the EU, The Netherlands takes a leading position in research on lesser-know species. In the Netherlands, the following lesser-known species have established a market.

- Calophyllum spp (Solomon Islands)
- Goupia glabra, Hymenaea courbaril, Mezilaurus itauba, Euxylophora paraensis, Micropholis guianensis, Hymenolobium spp, Diplotropis purpurea, Bagassa guianensis (Brazil)
- Lecythis spp (Tropical America)

The Dutch Authority is actively testing new species in the construction of roads and water facilities such as bridges,. Private companies in this construction sector are more interested in new species than in the sector of housing construction. Currently, the species seen in the market are Karri (Eucalyptus diversicolor), Louro itauba (Mezilaurus itauba), and Massaranduba (Manilkara huberi).

A number of lesser known species such as Louro Gamela (Nectandra rubra), Sucupira amarela (Qualea paraensis), Sucupira Vermelho (Andira unifoliata), Angelim da Campina (Aldina heterophylla) Guariuba (Clarisia racemosa), Jatoba (Hymenaea courbaril) appears now and then in the Netherlands'garden furniture segment.

Other lesser-known species which have been tested in The Netherlands to assess their opportunities are:
- Cedrelinga catenaeformis, Couratari spp, Caryocar villosum, Aspidosperma spp, Sacoglottis guianensis, Ocotea rubra (Brazil)
- Cordia alliodora (South America)
- Vitex spp, Pometia pinnata, Dillenia spp (Solomon Islands)
- Bailonella toxisperma, Autranella congolensis (Cameroon)
- Palaquium spp (South East Asia)

In Guatemala, many of the less traditional species have been introduced periodically to export markets, with mixed success. However, one species, Santa Maria, has shown some potential. It is very hard and resistant to humidity. It has shown some of the greatest potential because of it relative abundance, large volume and utility as a timber for flooring, furniture and boat construction.
At www.fsc-uk.demon.co.uk/UKsuppliers.html, you can find an overview of companies offering FSC tropical hardwoods and softwoods. The overview also includes the species on offer.

Plantations
The production of large-sized logs from the natural forests will continue to decline, particularly in the Asia-Pacific region. The primary and further processing industries have already started to adapt their manufacturing technologies and designs accordingly. Smaller-dimension logs will be increasingly used, based on timber from fast growing plantations (rubberwood, Gmelina, Acacia, Eucalyptus, teak) and secondary natural forests (ITC, 2001).

Genetic engineering
Initiatives in the field of genetic engineering have been developed in the wood sector, particularly in New Zealand. Research priorities lie mainly in the field of volume growth, density, fibre characteristics, branching and resistance to fungus. The attention is on species like eucalyptus, poplar, Pinus radiata and sweet gum. Researchers who are affiliated with the International Union for Forestry Research (IUFRO) have stated that there is consensus among researchers that biotechnology is safe to use and that it offers a sound perspective for the future. The European Commision holds the view of qualified optimism on genetically engineered timber and European traders are positive about it. According to Shell, however, genetically engineered timber will not be available in the near future, as public opinion is rather critical towards genetic engineering.

Trends in construction
Trends in the carpentry industry are the attention to detail and surface protection and the combination of materials. The construction industry has developed the concept of industrial building. A trend at the product level is that products have to be industrial, flexible and easily to dissemble. In the past, buildings were constructed to last forever. Nowadays, a number of architects has started working according to the idea that buildings need to be constructed in such a way that they can be easily disassembled, as ideas about construction and consumer preferences change over time.

Trends in window manufacturing
The window manufacturing industry is involved in R&D projects covering:
- Alternatives for tropical timber
- New glues
- Wood waste use
- Timber-aluminium combination
- Ecologically acceptable timber protection chemicals
- Combined timber-PVC joints in the window joints
- Moisture content development
- Recyclability
- Substitute of alkyd lacquer on water basis

The joints in the window frames are always the vulnerable part of the windows since moisture can easily penetrate if the joints are not well painted/lacquered or if the joints open after a certain time. Since the building industry has to give a guarantee on the life of wooden windows of at least 10 years, a sensor has been invented to monitor the moisture contents of the frame. The sensor is placed in the joint and the moisture value can be read, thus giving an indication as to if or when maintenance/renovation is required.

The combination of timber and aluminium in window manufacturing is gaining in popularity: aluminium on the outside since it is better weather-resisting and requires less maintenance. The timber on the inside is protected against weather influences and therefore does not require chemical treatments. The appearance of wood on the interior side enhances the feeling of comfort and warmth. The aluminium on the outside only requires cleaning from time to time, so the maintenance of such windows is very easy.

Do-It-Yourself
The DIY market has become strong as a result of economic expansion, high sales of homes over several years, increased leisure time, and the introduction of easier-to-use DIY products. In addition, there is a lively market in repair and renovation, given the large number of older homes and the growing number of home-owners. Furthermore, there is a trend of individualizing homes through DIY applications.

One of the leading DIY activities is the laying of a floor covering. Around 6 percent of the timber sold in the DIY stores consists of FSC certified timber, which represents 20 percent of total FSC timber sales. Leading suppliers of certified timber are Sweden and the USA. Currently, there is not much on offer from developing countries. DIY stores in The Netherlands do sell some smaller timber articles from the Solomon Islands and it is expected that in the near future products from Malaysia will become available in bigger quantitities.

E-commerce
In 1997 Timberweb.com in the UK was one of the first online platforms for buyers and sellers of sawn timber. Initially, the platform had only a British scope. In 2000, this platform was made accessible to buyers and sellers worldwide. In 1999 the trade site Houtbeurs.nl started in The Netherlands. The site is developing cooperation with similar trade sites in Sweden, Finland, Belgium and Malaysia.
However, according to the founder of Houtbeurs.nl there is still insufficient vision and policy developed to start trading through the Internet. In The Netherlands, there is not much trade through the Internet as yet. The sector is very traditional and online ordering is hard to realise, as prices are daily quotations and there is limited availability. However, Timberweb.com has almost 1,400 members from over 150 countries, including companies from a wide range of developing countries.

Engineered wood products
Engineered wood accounts for only a small fraction of the total construction timber market. It is forecasted that this fraction could multiply considerably over the next years.

Engineered wood products have enjoyed steady growth in Europe for more than a decade. The opportunities for these products are good now, in view of the need for efficient construction techniques, growing environmental concerns, and the universal requirement for affordable shelter.

The worldwide supply of virgin timberland is dwindling rapidly and the supply of tall, large diameter trees is diminishing. In response, several approaches have been developed to turn lower quality wood into higher quality wood products. These manufacturing processes use less wood fibre to do the same job as, or better than, conventional or commodity wood products. They utilise much more of the tree, including particles, flakes, strands and sheets of veneer – and that minimises waste.

A number of basic types of engineered wood has been developed, including Oriented Strand Board (OSB), Laminated veneer lumber (LVL), Parallel strand lumber

(PSL), Laminated strand lumber (LSL), I-joists and PLATO wood.

It would be wrong, however, to just think of engineered wood as a substitute for something which used to be better than its latter day equivalent. These modern composites, notably in I-joists, can create structures of outstanding strength and reliability which are far superior to sawn timber.

PLATO is the abbreviation of Providing Lasting Advanced Timber Option. Shell discovered a way to convert softwood types into wood with properties of hardwood, without the use of any chemicals.
The PLATO process results in a wood that is hard and does not need impregnation, even when it is used in water defence constructions. The durability of the PLATO wood can be compared with the durability of azobe and teak. Softwoods suitable for the process are poplar, pine-wood, Douglas, beech, birch, larch, obeche (ayous) and also the Pinus radiata.

People active in the industry expect that the growth of MDF will continue in non-standard MDF. Besides the standard quality, there is for example high-density, exterior, fire-retarding, moisture proof and glued, and zero-formaldehyde MDF.

4 PRODUCTION

In this chapter, we will first present an overview of the European wood-working industry and then provide details on production by timber group.

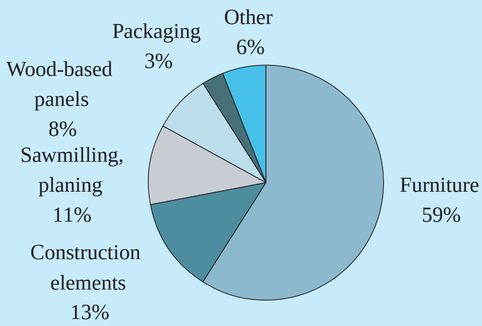
Industrial production
In 2000, the production value of the European wood-working industries was € 163 billion. During the last five years the sector has shown a strong performance with average annual growth of 5.0 percent. Figure 4.1 shows that furniture is the biggest wood-working industry, followed at a considerable distance by construction elements. The biggest producing country is Germany accounting for 21 percent of total European production, followed by Italy (29%), France (9 %), the UK (11%) and Spain (8%). The Netherlands was among the smallest producers, accounting for only 2 percent of total production.

During 2000, Belgium, Portugal, Spain and Sweden showed growth rates over 10 percent. These countries compensated for the disappointing output increment of Finland, France and in particular of Germany.

The French Industrial Statistics Service (SESSI) provides the following data.

The French Industrial Statistics Service (SESSI) has also published "L' Industrie des Panneaux à base de bois (Industry of wood-based panels). It not only analyses the French industry, but also provides a global picture. For orders (cost: € 27) please contact SESSI (see Appendix 9 for address).

Figure 4.1 Share of the different sectors in the European wood-working industries



Source: CEI-Bois, 2002

The demand for roundwood in West European countries is increasingly dominated by an ever smaller number of large wood-processing companies, leading to weaker pricing power of the traditional small, private and municipal forest owners and state forest services. Nevertheless, according to CEI-Bois the wood processing industry comprises around 335,000 companies, of which 96 percent has less than 20 employees.

The wood industry underwent a crisis in the early 1980s. During the second half of that decade there was a rapid expansion in the demand for wood products. The companies in the wood processing industry made substantial investments in order to respond to this larger

Table 4.2 Performance of principal European carpentry producers (in US$ million), 1998

	Windows	Doors	Construction materials	Other carpentry
Italy	3,437	539	103	12
Germany	1,558	1,469	n.a.	1,534
France	458	637	53	387
United Kingdom	n.a.	443	618	1,055
Austria	531	327	369	321
Spain	79	679	72	49
The Netherlands	352	229	107	197
Denmark	442	134	73	227
Sweden	158	163	412	140
Finland	108	133	242	99
Belgium	98	115	42	117
Portugal	8	91	1	n.a.
Greece	4	4	4	2
Ireland	25	50	39	48

Source: Adapted from Sessi, 2000

demand. New investments resulted in a rationalisation of the production process and an improvement in efficiency and productivity. The capital intensity of the production process increased considerably. Investments were also focused on the introduction of new products like MDF and OSB.

An increasing number of companies in the German wood and furniture industry shifted their production to outside Germany, with Central and Eastern Europe being the preferred new locations.

Due to the fast changes in production techniques, the sector is having increasing difficulties in finding properly trained staff. Considerable attention has been paid to raising training standards. The EU (EUROFORTECH, European Network for education, training and technology transfer in the Wood and Forestry sector) has developed an education programme in the area of timber engineering and design known as STEP (Structural Timber Education Programme).

Production of roundwood

Around 283 million m^3 of roundwood was produced in EU countries in 2000. Removals in all leading producing countries increased.

The Netherlands was the smallest EU producer after Luxembourg, accounting for only 1.04 million m^3 of roundwood.

Wood-based panels

The chip-board industry is a capital-intensive sector. Production is practically fully automated, requiring massive research and development efforts, and the investment threshold is high, especially for the continous production lines. Therefore, the companies in this industry are generally bigger than in the rest of the wood-processing industry.

In the fibreboard sector, investments are focused on the development of new products, the modernisation of existing products, the increase in capacity and the shift to environmentally friendly production methods.

In the plywood sector, technological development and computer applications in production control and the operation of machinery have lowered production costs to a large extent. Investments by European companies are characterised by modernisation and new product development.

Analysts point out that output of particleboard in Central Europe is still too high and new production is adding to existing glut in supply. Stocks of particleboard producers are still described as much too high. Short-term market prospects are rather unfavourable (ITTO Tropical Timber Market Report).

In 2000, production of particleboard and MDF by European manufacturers amounted to 29.2 million m^3 and 9 million m^3 respectively. A further 11 percent growth is expected in MDF during 2001, buoyed by its increasing acceptance and the strong growth in laminate flooring; some manufacturers are even predicting a slight shortage of supply. OSB production saw a rise during 2001, growing 28 percent to 1.6 million m^2. In the medium run, it is expected that the relatively high speed of investments will continue in the wood-based panels branch. In 1998 and 1999 numerous plants were taken into operation in particular in Central Europe, while in 2000 a calming down of investments developed. After 1999 had been characterised by the start-up of 7 MDF plants in Central Europe, start-ups in 2000 consisted mainly of OSB plants.

Investments in the laminate flooring industry were concentrated on a diminishing number of companies.

Table 4.1 Production (removals) of roundwood by selected countries, in 1000 m^3

Country	1998	1999	2000
Sweden	60,600	58,700	61,800
Finland	53,660	53,637	54,263
France	35,527	43,008	50,170
Germany	39,052	37,634	49,106
Spain	14,874	14,810	14,810
Austria	14,033	14,083	13,276
Portugal	8,548	8,978	9,450
Italy	9,550	11,138	9,329
UK	7,260	7,482	7,451
Total EU	**254,460**	**261,511**	**283,393**

Source: ECE/FAO TIMBER database, 2001

Apart from the establishment of European production sites with substantial capacities, these companies are engaging in concrete plans in non-European countries. During the past years, domestic producers in Asia have also intensified their investment activities.

In 2000, the parquet production in the countries[5] represented in the European Federation of the Parquet Industry, FEP, reached a production volume of almost 63 million m^3. Compared to 1999, this corresponds to a 3.6 percent increase. This indicates the continuing popularity of natural wood floors. The table below gives an overview of parquet production since 1990. Please note that the UK is not represented in the FEP.

Table 4.3 Parquet production by FEP countries

	1,000 m^2	+ / - %
1990	35,634	3,1%
1991	35,294	-1,0%
1992	37,977	7,6%
1993	40,396	6,4%
1994	44,972	11,3%
1995	49,798	10,7%
1996	50,578	1,6%
1997	53,836	6,4%
1998	58,308	8,3%
1999	60,774	4,2%
2000	62,957	3.6%

Source: FEP, 2001

The increase in production can mainly be ascribed to very strong production increases in Finland, Germany, Spain and The Netherlands. France on the other hand, reported considerable lower production. In absolute figures, Sweden remains the most important parquet producing country within the FEP (22% compared to 23% in 1999), followed by Germany (18.3% vs. 16.6%), France (10.5% vs. 12%), Norway/Denmark (9.0% vs. 9.2%), Finland (8.6%) and Italy (8.3%).

It is expected that production in the prefabricated parquetry industry in Europe will continue on an unchanged high level. While the production of standard qualities with groove/key has been reduced, the suppliers of prefabricated parquetry for gluefree laying have expanded their output. In view of a general weakening of demand, the existing production capacities are clearly in excess of requirements (ITTO's Tropical Timber Market Report).

Building components

Investments have focused on plant modernisation and capacity increase. Producers tend to specialise considerably and the sector is characterised by numerous acquisitions, particularly in Germany.

In brief, there are three generic strategies for companies in this sector. The first one is to specialise and to focus on the local market, by taking the specific preferences and requirements of local consumers and building companies into account. Aspects such as service and flexibility are very important aspects of this strategy, which is common among SMEs. The second strategy involves concentration and mass production of highly standardised building components.
The market for these products is the entire EU. Economies of scale and price leadership are the keys to success. Large companies which employ this strategy have to reckon with extra-EU imports. A third strategy is to focus on a product with specific technical properties. Unlike the first (specialisation) strategy, it allows firms, including SMEs, to operate on the EU level. This strategy is likely to become more important as the harmonisation of standards for these products continues.

[5] *These include: Austria, Belgium, Switzerland, Sweden, Norway, Denmark, Finland, The Netherlands, Italy, France, Spain and Germany.*

5 IMPORTS

The timber and timber products discussed in this survey are covered by Chapter 44 of the Harmonised System. Of the latter product group builders' joinery and carpentry, windows (441810), doors (441820) and parquet panels (441830) will be highlighted in the tables and figures.

The International Tropical Timber Organisation (ITTO) specifies the product group HS 4403 as logs.

Together, these product groups comprise around 85 percent of total timber and timber products covered by Chapter 44 of the Harmonised System. Please refer to Appendix 2 for detailed trade statistics of the EU and of the major national trade markets within the EU.

There are no trade data on certified timber. There is a much smaller volume of certified timber coming from developing countries than that originating in developed countries. Currently, the WWF 95+ Group in the UK imports FSC certified timber from countries like Malaysia, and Indonesia. The Netherlands imports substantial amounts of FSC certified timber from Brazil.

5.1 Total imports

Between 1998 and 2000, value imports of timber and timber products by EU member countries decreased by 5 percent, amounting to almost US$ 22 billion in 2000. In terms of volume, though, imports increased by 19 percent over the same period, amounting to 84 million tonnes in 2000.

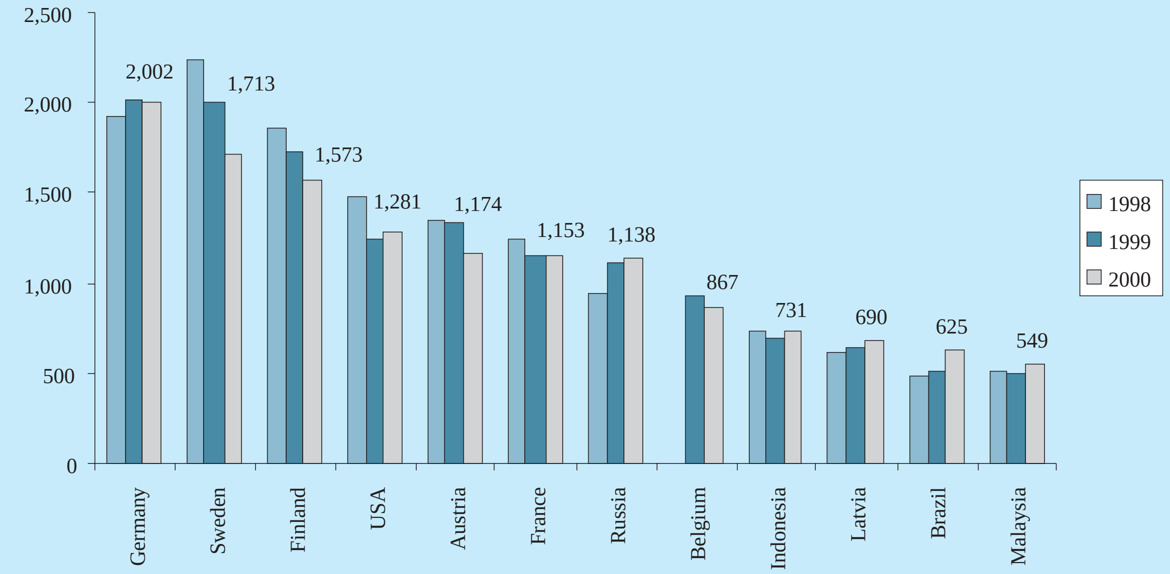
However, it should be noted that, although the US$ is the basic currency unit used to indicate the imported values, Eurostat trade statistics are expressed in € and transferred into US$. Hence the developments in the imported values are also influenced by the € / US$ exchange rate. So while imported value declined in terms of US$, it increased in terms of €. In this chapter, only the fluctuations in the imported value in terms of US$ will be analysed, unless it is specifically stated otherwise. For more information about the exchange rate, please refer to Chapter 2 of this survey. Please also refer to Appendix 2 for detailed trade statistics (including the € values) of the EU and of the major national trade markets within the EU.

Table 5.1 Imports of timber and timber products by EU member countries, 1998-2000
US$ million / € million / 1,000 tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	22,794	70,711	22,500	21,226	76,252	21,713	23,601	84,185
Extra-EU	10,693	39,448	10,890	10,273	44,501	11,002	11,959	48,353
Germany	4,628	8,529	4,265	4,024	9,133	3,578	3,889	8,884
United Kingdom	3,360	6,406	3,321	3,133	6,277	3,391	3,686	6,940
Italy	3,283	10,061	3,260	3,075	10,175	3,117	3,388	11,180
France	1,849	4,044	1,889	1,782	4,381	1,950	2,120	4,754
Netherlands	1,770	3,811	1,776	1,676	3,680	1,641	1,784	3,584
Spain	1,471	4,444	1,425	1,344	4,418	1,609	1,749	5,983
Belgium	n.a.	n.a.	1,419	1,339	4,788	1,459	1,586	5,902
Austria	1,169	5,383	1,336	1,260	7,309	1,241	1,349	9,036
Denmark	1,091	2,520	1,040	981	2,482	997	1,084	2,603
Sweden	877	8,968	911	859	10,038	939	1,020	11,575
Finland	555	8,798	553	521	9,663	527	572	9,665
Portugal	521	2,081	485	457	1,572	459	499	1,739
Ireland	390	568	391	369	560	445	483	656
Greece	379	881	324	306	845	273	296	824
Luxembourg	n.a.	n.a.	106	100	931	87	95	859
Belgium & Luxembourg	1,453	4,217	-	-	-	-	-	-

n.a. not available
Source: Eurostat, 2001

Figure 5.1 The leading suppliers of timber and timber products to the EU, 1998-2000 in US$ million



Source: Eurostat, 2001

In 2000, Germany was the leading importer, accounting for over 16 percent of total imports (in value) by EU member countries, followed by the United Kingdom (16%), Italy (14%), France (9%) and The Netherlands (8%). Of the leading importers, only the United Kingdom, France and Spain saw their (value) imports increase between 1998 and 2000.
Spain was also a leading market for tropical timber, in particular for timber from South America because of the long-existing trading relations. Spanish imports amounted to US$ 1.6 billion and 6 million tonnes in 2000, representing an increase by 9 percent in value and 35 percent in volume since 1998. According to trade data, Spanish imports of timber and timber products from South American countries like Brazil, Uruguay and Chile increased considerably during the survey period.

Please note that Sweden and Finland import large volumes of low value timber. In 2000, Sweden imported 3.6 million tonnes from Latvia, 3.2 million tonnes from Russia and 2 million tonnes from Estonia. In the same year, Finland imported 8.2 million tonnes from Russia. The imports originating in these East European countries consist almost completely of wood in the rough.

Germany, Sweden and Finland were the leading supplying countries of timber and timber products, together accounting for a quarter of total value imports by EU member countries in 2000. In the same year, around half of total imports by EU member countries was supplied by extra-EU countries, of which 40 percent originated in developing countries.

Germany

In 2000, Germany was the leading EU importer of timber and timber products, with imports amounting to US$ 3.6 billion (8.9 million tonnes). Compared to 1998, this represented a decrease by as much as 23 percent in value, but an increase 4 percent in volume.

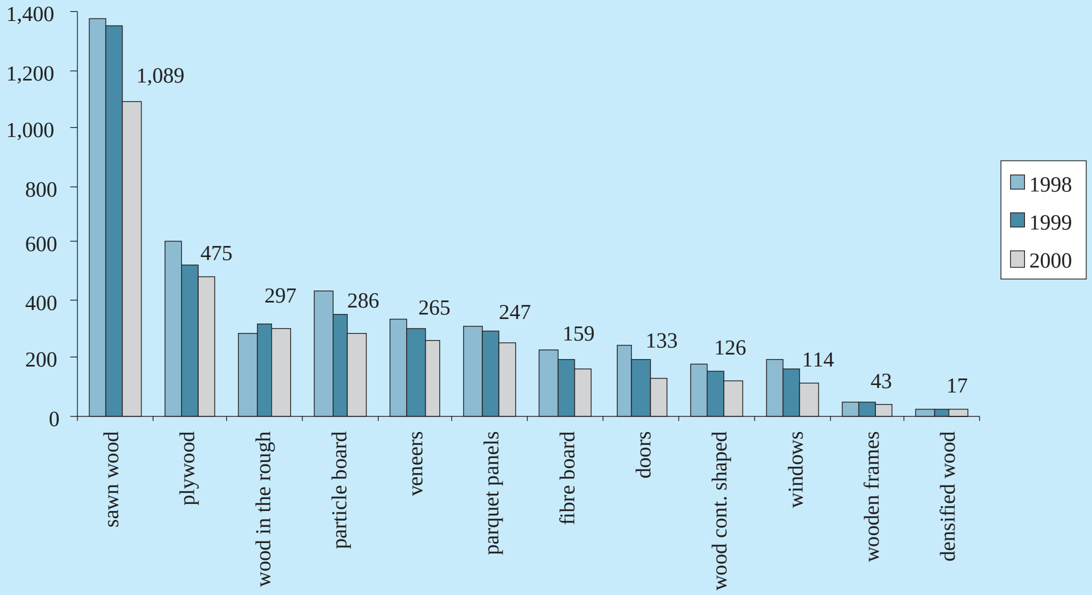
In 2000, 54 percent of total imports was supplied by extra-EU countries, of which about a quarter originated in developing countries.

Compared to other leading markets, veneers and plywood were relatively more important in Germany, while sawn wood was relatively less important.
With the exception of wood in the rough, all the product groups imported into Germany decreased, in some cases considerably, during the survey period.

The leading suppliers of timber and timber products to Germany (share of total year 2000 imports in terms of value)

→ Finland (9%), Austria (8%), Poland (7%), Sweden (7%), USA (6%), Czech Republic (6%), France (5%), Belgium (4%), Italy (4%)

Figure 5.2 **Imports of selected timber and timber products into Germany, 1998-2000 in US$ million**

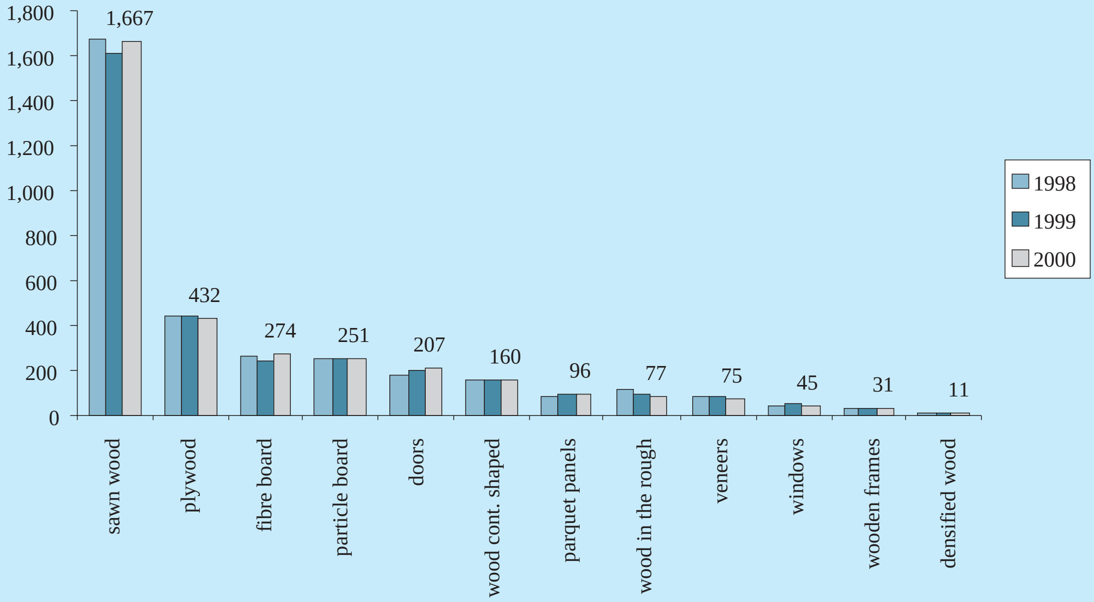


Source: Eurostat, 2001

United Kingdom

The United Kingdom was the second leading EU importer of timber and timber products, with imports amounting to US$ 3.4 billion (6.9 million tonnes) in 2000. Between 1998 and 2000, UK imports of timber and timber products remained fairly stable in terms of value, but increased by 8 percent in terms of volume. About half of the imported value in 2000 was supplied by non-EU countries, of which 37 percent originated in developing countries.

Figure 5.3 **Imports of timber and timber products into the United Kingdom, 1998-2000 in US$ million**



Source: Eurostat, 2001

The leading suppliers of timber and timber products to the UK (share of total 2000 imports in terms of value)

→ Sweden (15%), Finland (11%), Latvia (9%), USA (6%), Germany (6%), Indonesia (5%), Brazil (5%), Canada (4%), Ireland (4%), Belgium (4%), Malaysia (3%)

The United Kingdom was the leading EU importer of sawn wood. In 2000, sawn wood, plywood and doors were relatively more important product groups in the United Kingdom compared to the EU average, while wood in the rough and veneers were relatively less important.

Italy

As from 1998, imports of timber and timber products into Italy decreased by 5 percent in value but increased by 11 percent in volume, amounting to US$ 3.2 billion (11.2 million tonnes) in 2000. More than half of the 2000 imported value originated in extra-EU countries, of which 50 percent in developing countries.

In 2000, imports of sawn wood into Italy represented more than half of total Italian imports of timber and timber products. Wood in the rough and veneers were also relatively more important compared to the EU average. The other product groups, in particular plywood, particle board, fibreboard and parquet panels, were relatively less imported into Italy than into other EU member countries.

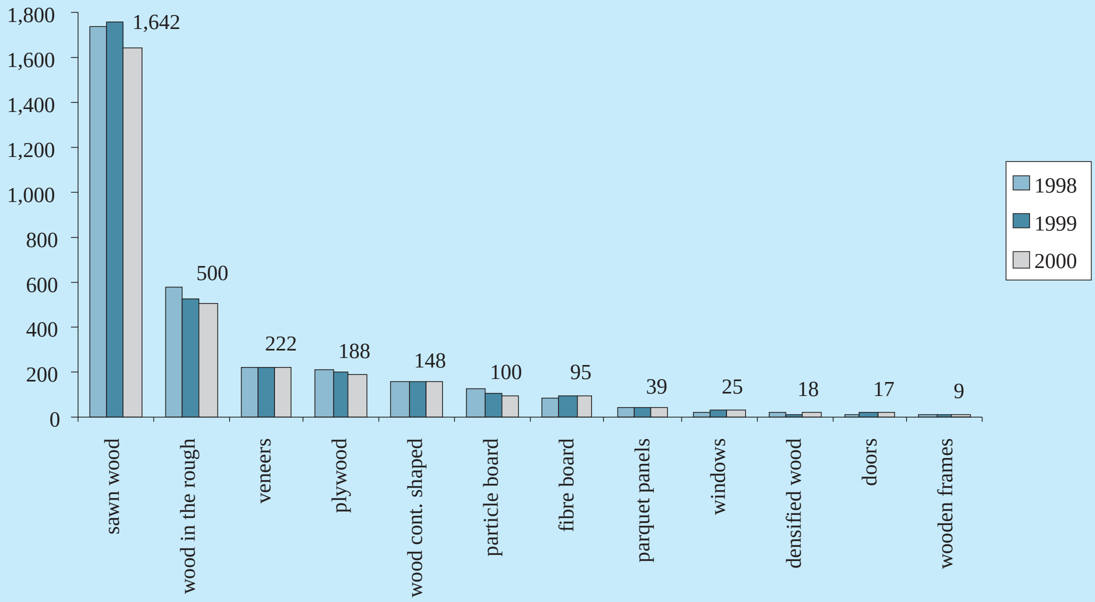
France

In 2000, French timber and timber product imports amounted to almost US$ 2 billion or 4.8 million tonnes, representing an increase of 5 percent in value and 18 percent in volume since 1998. Of the imported value in 2000, 43 percent originated in extra-EU countries, of which 63 percent from developing countries.

The leading suppliers of timber and timber products to Italy (share of total year 2000 imports in terms of value)

→ Austria (25%), Germany (9%), USA (7%), France (6%), Cameroon (4%), Switzerland (4%), Croatia (3%), Côte d'Ivoire (3%), Finland (3%), Russia (3%)

Figure 5.4 Imports of timber and timber products into Italy, 1998-2000 in US$ million

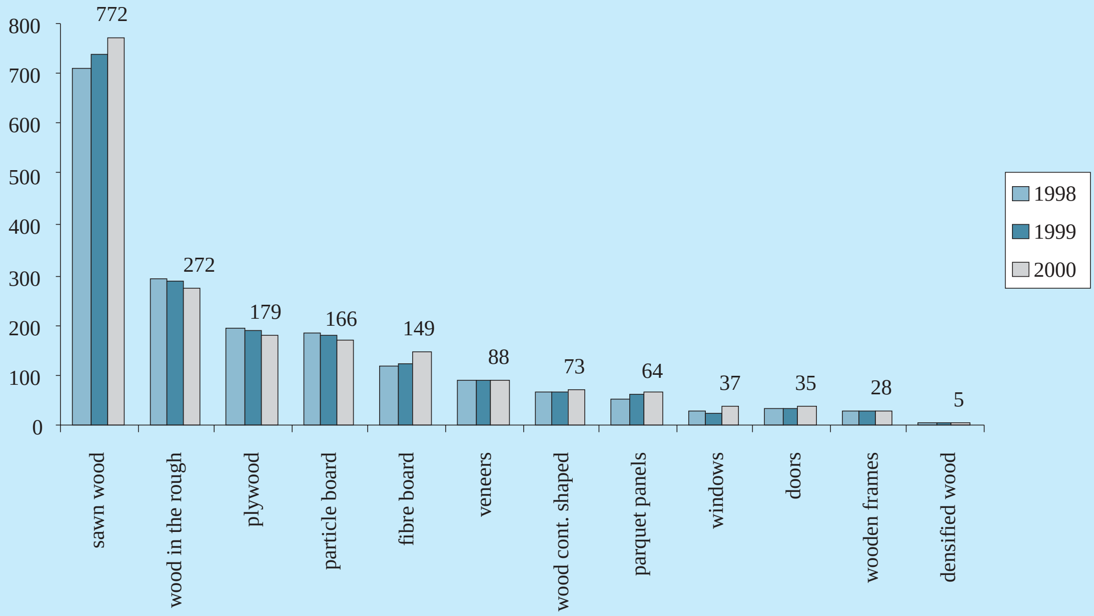


Source: Eurostat, 2001

The leading suppliers of timber and timber products to France (share of total year 2000 imports in terms of value)

→ Germany (14%), Belgium (13%), Finland (10%), Gabon (6%), Brazil (5%), Sweden (5%), Italy (4%), USA (3%), Spain (3%), Russia (3%)

Figure 5.5 Imports of timber and timber products into France, 1998-2000 in US$ million



Source: Eurostat, 2001

In 2000, the shares of the different products groups in total French imports were more or less comparable to the overall EU average.

The Netherlands

The Netherlands was among the leading EU importers of timber and timber products, accounting for US$ 1.8 billion (3.6 million tonnes) in 2000.

Between 1998 and 2000, Netherlands imports of timber and timber products declined by 7 percent in value and by 6 percent in volume. Almost half of the imported value originated in extra-EU countries, of which 56 percent in developing countries.
Compared to the EU average, sawn wood, particle board and plywood were relatively more popular in The Netherlands in 2000, while wood in the rough and veneers were relatively less popular.

The leading suppliers of timber and timber products to The Netherlands (share of total year 2000 imports in terms of value)

→ Belgium (14%), Malaysia (10%), Sweden (9%), Germany (9%), Finland (9%), Indonesia (7%), France (6%), Russia (5%), USA (3%), Cameroon (3%)

Figure 5.6 **Imports of timber and timber products into The Netherlands, 1998-2000 in US$ million**

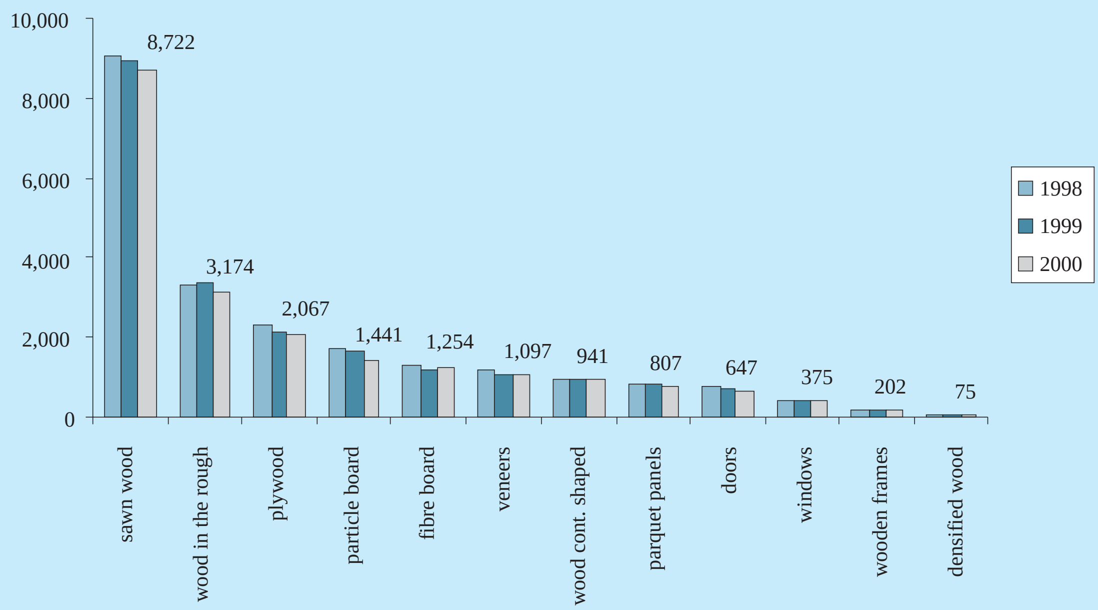
Source: Eurostat, 2001

5.2 Imports by product group

Figure 5.7 presents an overview of value imports by EU member countries of timber and timber products. As already mentioned, total imports amounted to US$ 22 billion or 84 million tonnes in 2000.

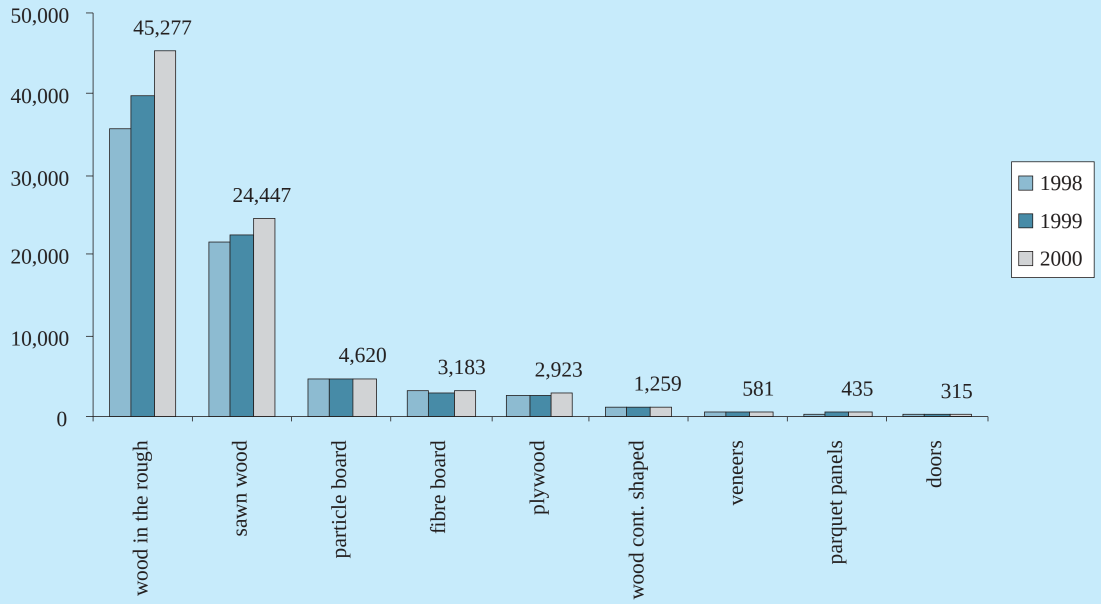
Sawn wood was by far the leading imported product, representing 40 percent of total 2000 imports (in value) by EU member countries, followed at a distance by wood in the rough (15%), plywood (10%), particle board (7%), fibreboard (6%) and veneers (5%).

Figure 5.7 **Imports of timber and timber products by EU member countries, 1998-2000 in US$ million**



Source: Eurostat, 2001

Figure 5.8 **Imports of timber and timber products by EU member countries, 1998-2000**
thousand tonnes



Source: Eurostat, 2001

In terms of volume, the picture was somewhat different, as is shown in Figure 5.8. Here, wood in the rough was by far the most imported product group, representing more than half of total imports by EU member countries in 2000. Other leading imported products groups were sawn wood (29%), particle board (5%), fibreboard (4%) and plywood (3%).
The imports of windows, wooden frames and densified wood played only a minor role in the overall picture, as together they represented only 0.4 percent of timber and timber product imports (in volume) by EU member countries in 2000.

Sawn wood
In 2000, this product group accounted for 40 percent of the imported value and for 29 percent of the imported volume of timber and timber products by EU member countries. In the same year, these imports amounted to US$ 8.7 billion (24 million tonnes), representing a decrease by 3 percent in value but an increase by 13 percent in volume since 1998. The leading EU importers of sawn wood were the United Kingdom, Italy and Germany, together accounting for half of imports (in value) by EU member countries in 2000.

The leading suppliers (share of total year 2000 imports in terms of value) of sawn wood:

→ Sweden (15%), Finland (11%), USA (9%), Austria (7%), Germany (5%), Russia (5%), Latvia (5%), Canada (5%), Malaysia (4%), Cameroon (3%)

Wood in the rough
Although this product group accounted for only 15 percent of the total imported value, in terms of volume it accounted for over 50 percent of timber and timber product imports by EU member countries in 2000. In that year, imports of wood in the rough by EU member countries amounted to US$ 3.3 billion (40 million tonnes), representing a decrease by 4 percent in value and an increase by 27 percent in volume since 1998. The leading importer was Italy, accounting for 16 percent of year 2000 imports (in value) by EU member countries, followed by Sweden (15%), Austria (14%) and Finland (11%).
Of the leading importers, only Sweden increased its imports of wood in the rough between 1998 and 2000.

The leading suppliers (share of total year 2000 imports in terms of value) of wood in the rough:

→ Russia (17%), Germany (10%), France (10%), Gabon (6%), Switzerland (5%), Latvia (5%), USA (5%), Estonia (4%), Cameroon (4%)

Builder's joinery and carpentry
In 2000, this product group accounted for 13 percent of the imported value and 2 percent of the imported volume of timber and timber products by EU member

Table 5.2 **Imports of sawn wood by EU member countries, 1998-2000**
US$ million / € million / 1,000 tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	9,035	21,555	8,930	8,425	22,600	8,722	9,481	24,447
Extra-EU	4,416	9,773	4,552	4,295	11,102	4,738	5,150	12,326
United Kingdom	1,671	3,855	1,613	1,521	3,931	1,667	1,811	4,411
Italy	1,734	4,438	1,751	1,652	4,733	1,642	1,785	5,033
Germany	1,380	3,551	1,349	1,273	3,851	1,089	1,183	3,494
Netherlands	843	2,217	862	813	2,058	833	906	2,085
France	711	1,510	741	700	1,738	772	840	1,937
Spain	699	1,529	670	632	1,562	751	817	1,964
Belgium	n.a.	n.a.	515	486	1,191	562	611	1,390
Denmark	568	1,274	528	498	1,255	506	550	1,369
Austria	248	758	277	261	942	270	294	1,069
Ireland	169	303	168	158	313	184	200	375
Greece	176	441	145	137	402	135	147	442
Sweden	115	170	109	103	177	113	123	202
Portugal	100	175	116	110	213	107	116	413
Finland	67	145	71	67	192	78	85	227
Luxembourg	n.a.	n.a.	14	13	42	12	13	36
Belgium & Luxembourg	554	1,189	-	-	-	-	-	-

Source: Eurostat, 2001

Table 5.3 **Imports of wood in the rough by EU member countries, 1998-2000**
US$ million / € million / 1,000 tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	3,310	35,557	3,325	3,137	39,895	3,174	3,450	45,277
Extra-EU	2,183	24,856	2,248	2,121	28,400	2,147	2,334	30,774
Italy	580	4,283	529	499	4,062	500	543	4,590
Sweden	436	8,375	476	449	9,410	487	530	10,872
Austria	347	4,147	469	442	5,750	438	476	7,364
Finland	399	8,549	390	368	9,355	351	381	9,294
Germany	286	1,706	317	299	2,211	297	323	2,518
France	292	1,454	286	269	1,492	272	296	1,491
Spain	236	1,819	219	206	1,940	272	295	3,052
Portugal	261	1,755	179	169	1,173	157	171	1,101
Belgium	n.a.	n.a.	167	158	2,314	152	165	2,971
United Kingdom	118	349	86	81	207	77	84	195
Denmark	82	658	72	68	598	50	54	490
Netherlands	47	370	39	37	317	39	42	354
Ireland	34	73	33	32	71	34	36	72
Greece	40	148	32	30	139	28	31	131
Luxembourg	n.a.	n.a.	32	30	856	21	23	781
Belgium & Luxembourg	151	1,872	-	-	-	-	-	-

Source: Eurostat, 2001

Table 5.4 Imports of builder's joinery and carpentry by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	2,819,080	1,372,977	2,879,786	2,716,779	1,543,101	2,740,264	2,978,548	1,701,781
Extra-EU	1,101,199	653,863	1,193,045	1,125,514	763,803	1,237,836	1,345,474	855,154
Germany	1,123,650	549,677	1,006,707	949,724	551,184	819,545	890,810	524,707
United Kingdom	349,191	158,196	404,685	381,778	186,693	414,692	450,752	216,945
Austria	252,793	97,909	247,109	233,122	115,627	226,665	246,375	136,009
France	166,019	91,413	184,504	174,060	112,241	217,902	236,850	155,290
Italy	148,453	102,288	189,467	178,742	139,325	194,869	211,814	168,769
Netherlands	204,074	121,502	209,162	197,323	129,798	181,708	197,509	120,394
Denmark	126,822	52,136	152,120	143,509	73,123	153,045	166,353	89,025
Belgium	n.a.	n.a.	154,019	145,301	81,886	139,243	151,351	85,525
Spain	84,855	38,619	89,558	84,489	48,784	117,481	127,697	69,303
Ireland	53,098	22,286	61,497	58,016	26,090	80,958	87,998	36,112
Sweden	50,692	22,042	50,178	47,338	23,777	68,801	74,784	33,575
Portugal	46,253	19,865	57,256	54,015	25,399	59,067	64,203	33,465
Finland	25,092	14,511	26,512	25,011	14,979	29,065	31,592	18,706
Luxembourg	n.a.	n.a.	32,116	30,298	8,286	28,503	30,981	9,440
Greece	14,217	5,630	14,910	14,066	5,909	8,725	9,484	4,516
Belgium & Luxembourg	173,862	76,903	-	-	-	-	-	-

Source: Eurostat, 2001

countries. Between 1998 and 2000, imports of builder's joinery and carpentry decreased by 3 percent in terms of value, but increased by 24 percent in terms of volume, amounting to US$ 2.7 billion or 1.7 million tonnes in 2000. The leading EU importer of builder's joinery and carpentry was by far Germany, accounting for 30 percent of the imported value in 2000, followed by the United Kingdom (15%), Austria (8%) and France (8%).

Parquet panels played a major role within this product group, accounting for 29 percent of the total imported value in 2000, followed by doors (24%) and windows (14%).

Plywood
This product group accounted for 10 percent of value imports and for 3 percent of volume imports of total timber and timber products by EU member countries in 2000. Between 1998 and 2000, plywood imports by EU member countries decreased by 10 percent in value but increased by 6 percent in volume, amounting to US$ 2.1 billion (2.9 million tonnes) in 2000.
The leading EU importers of plywood were by far Germany and the United Kingdom, together accounting for 44 percent of the imported value by EU member countries in 2000.

The leading suppliers (share of total year 2000 imports in terms of value) of plywood:

→ Finland (18%), Indonesia (14%), Brazil (13%), Russia (7%), France (6%), Germany (5%), Belgium (4%), Italy (3%), Latvia (3%)

The leading suppliers (share of total year 2000 imports in terms of value) of:

windows → Denmark (37%), Poland (10%), Norway (6%), Slovenia (5%), Austria (5%), France (5%), United Kingdom (5%), Germany (4%)

doors → Indonesia (10%), Italy (7%), South Africa (6%), Spain (6%), Brazil (6%), Germany (5%), Sweden (5%), Poland (5%), Slovenia (5%),

parquet panels → Sweden (15%), Belgium (11%), Germany (11%), Norway (5%), Austria (5%), France (5%), China (5%), Denmark (5%), Finland (5%)

Table 5.5 Imports of plywood by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,297,010	2,744,887	2,167,613	2,044,918	2,794,909	2,066,997	2,246,736	2,922,615
Extra-EU	1,231,735	1,798,500	1,145,688	1,080,838	1,757,427	1,131,230	1,229,598	1,885,816
Germany	599,952	653,182	518,251	488,916	622,456	474,967	516,268	659,742
United Kingdom	444,358	625,766	444,637	419,469	639,506	431,690	469,228	675,400
Netherlands	269,829	309,021	260,095	245,373	356,408	233,713	254,036	295,743
Belgium	n.a.	n.a.	208,772	196,955	299,652	188,878	205,302	287,611
Italy	207,275	248,674	195,871	184,784	242,619	187,518	203,824	268,681
France	190,961	207,951	187,598	176,979	214,179	179,246	194,833	223,707
Denmark	96,380	119,936	78,858	74,394	118,442	84,564	91,917	149,523
Sweden	79,714	84,627	76,022	71,719	87,078	76,302	82,937	99,418
Austria	87,137	72,091	83,025	78,325	77,964	75,371	81,925	82,319
Spain	36,718	33,002	38,783	36,588	35,335	47,322	51,437	49,376
Ireland	39,094	57,605	38,153	35,993	52,778	46,150	50,163	67,033
Portugal	9,688	9,243	13,040	12,302	12,050	15,786	17,159	16,500
Finland	10,483	16,301	8,207	7,742	15,286	11,612	12,622	22,919
Greece	10,944	13,627	12,317	11,620	16,023	10,747	11,682	15,270
Luxembourg	n.a.	n.a.	3,996	3,770	5,133	3,131	3,403	9,373
Belgium & Luxembourg	214,476	293,861	-	-	-	-	-	-

Source: Eurostat, 2001

Particle board
Although particle board was a relatively large product group (around 7 percent of the imported value in 2000), it was not particularly interesting for developing country exporters, since less than 1 percent of value imports by EU member countries in 2000 originated in developing countries. In that year, imports amounted to US$ 1.4 billion or 4.6 million tonnes, indicating a decrease in value by 14 percent since 1998, while the imported volume remained more or less stable.
Germany, the United Kingdom and France were the leading EU importers of particle board, together accounting for nearly half of year 2000 imports (in value) by EU member countries. The leading supplier of particle board was Germany, supplying 22 percent of the imported value in 2000, followed by Belgium (16%), Austria (12%), France (10%) and Sweden (5%).

Fibreboard
Between 1998 and 2000, imports of fibreboard by EU member countries remained fairly stable, amounting to US$ 1.3 billion or 3.2 million tonnes in 2000.
The leading EU importer was the United Kingdom, accounting for 22 percent of the imported value in 2000, followed by Germany (13%), Belgium (12%), France (12%), Italy (8%). Only 3 percent of fibreboard imports originated in developing countries. The leading supplier of fibreboard was Germany, accounting for 23 percent of value imports by EU member countries in 2000, followed by France (11%), Belgium (9%), Ireland (7%), Spain (6%) and Switzerland (5%).

Veneers
In 2000, veneers accounted for only 5 percent of value imports and less than 1 percent of volume imports of timber and timber products by EU member countries. However, this product group may be of relative importance to developing country exporters, since more than 20 percent of value imports and 36 percent of volume imports originated in developing countries.
In 2000, imports by EU member countries amounted to US$ 1.1 billion (581 thousand tonnes), representing a decrease by 7 percent in value and a small increase in volume since 1998. The leading EU importers of veneers were by far Germany and Italy, together accounting for 44 percent of the imported value by EU member countries in 2000. Of the largest importers, only Spain increased its imports in terms of value between 1998 and 2000.

The leading suppliers (share of total year 2000 imports in terms of value) of veneers:

→ USA (23%), Germany (16%), France (7%), Côte d'Ivoire (5%), Italy (4%), Spain (3%), Ghana (3%), Switzerland (3%)

Table 5.6 Imports of veneers by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,179,396	577,185	1,116,072	1,052,898	542,644	1,096,542	1,191,894	581,388
Extra-EU	675,128	346,287	632,922	597,096	329,759	630,491	685,316	352,949
Germany	331,380	122,019	296,506	279,723	108,866	265,032	288,078	104,984
Italy	225,892	138,073	218,835	206,448	133,361	221,563	240,829	149,483
Spain	119,774	63,699	123,236	116,260	66,020	148,378	161,280	80,525
France	93,168	75,248	86,905	81,986	68,175	87,525	95,136	75,478
United Kingdom	84,582	34,023	80,894	76,315	30,681	75,435	81,995	27,877
Belgium	n.a.	n.a.	58,684	55,362	26,816	54,348	59,074	32,328
Denmark	55,405	22,688	52,979	49,980	20,826	51,214	55,667	22,888
Sweden	55,987	23,316	54,742	51,643	26,137	50,774	55,189	25,083
Austria	46,471	15,246	45,365	42,797	14,420	48,236	52,430	17,830
Portugal	29,695	14,343	34,532	32,577	18,596	39,662	43,111	20,845
Greece	26,168	8,463	23,708	22,366	7,568	20,658	22,454	7,342
Netherlands	24,079	15,496	19,362	18,266	11,973	15,611	16,968	10,016
Finland	9,818	3,041	12,206	11,515	5,195	10,230	11,120	3,415
Ireland	10,166	7,280	7,634	7,202	3,887	7,274	7,906	3,033
Luxembourg	n.a.	n.a.	495	467	123	613	666	261
Belgium & Luxembourg	66,816	34,250	-	-	-	-	-	-

Source: Eurostat, 2001

Continuously shaped wood
Continuously shaped wood accounted for 4 percent of value imports of timber and timber products and 1.5 percent of volume imports of timber and timber products by EU member countries. This product group may also be of relative importance to developing country exporters, since a third of the imported value and around 23 percent of imported volume in 2000 originated in developing countries. In the same year, total imports by EU member countries amounted to US$ 941 million (1.3 million tonnes), representing a small increase in value, but more than 25 percent in volume since 1998. The leading EU importers of continuously shaped wood were the United Kingdom, Italy and Germany, together accounting for almost half of value imports by EU member countries in 2000. Of these countries, only the United Kingdom increased its imported value between 1998 and 2000.

The leading suppliers (share of total year 2000 imports in terms of value) of continuously shaped wood:

→ Indonesia (14%), Italy (9%), Germany (7%), Sweden (6%), Austria (5%), France (5%), The Netherlands (4%), Malaysia (4%), Finland (4%)

Wooden frames
Although wooden frames accounted for less than 1 percent of total imports of timber and timber products by EU member countries in 2000, this product group may be of relative importance for developing country exporters. Not only was more than 40 percent of the imports supplied by developing countries, this product group was also one of the fastest growing import products, representing an increase of 6 percent in value and 28 percent in volume between 1998 and 2000.
In 2000, imports by EU member countries amounted to US$ 202 million (68 thousand tonnes) of which more than a fifth was imported into Germany. Other major EU importers were the United Kingdom (15%), France (14%), Belgium (10%) and The Netherlands (10%). The leading supplier of wooden frames to the EU is by far China, supplying 31 percent of 2000 imports (in value) by EU member countries, followed by Italy (12%), Belgium (7%), Thailand (5%) and The Netherlands (5%).

Densified wood
Densified wood represented only around 0.3 percent of value imports and 0.1 percent of volume imports of timber and timber products by EU member countries in 2000. Between 1998 and 2000, imports of densified wood increased by 10 percent in value and by over 50 percent in volume, amounting to US$ 75 million or 102 thousand tonnes in 2000. The leading EU importer

Table 5.7 Imports of continuously shaped wood by EU member countries, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	939,571	995,737	954,343	900,324	1,116,127	941,020	1,022,848	1,258,897
Extra-EU	408,673	359,727	425,312	401,238	390,816	470,448	511,357	454,579
United Kingdom	151,164	91,048	160,005	150,948	100,563	159,703	173,590	112,166
Italy	158,004	136,554	160,047	150,988	142,582	148,486	161,398	143,811
Germany	177,264	179,489	155,328	146,536	175,176	126,161	137,131	157,118
Belgium	n.a.	n.a.	94,189	88,858	386,968	118,306	128,594	506,319
Netherlands	64,562	57,055	70,929	66,914	69,603	76,642	83,306	79,425
France	64,867	43,090	66,568	62,800	54,455	72,666	78,985	64,968
Spain	61,624	44,872	65,615	61,901	52,899	61,133	66,449	51,714
Austria	45,662	30,094	48,760	46,000	37,323	46,901	50,979	40,204
Ireland	38,532	26,961	39,261	37,039	25,147	45,395	49,342	28,016
Portugal	34,148	21,200	38,190	36,028	25,667	31,147	33,855	22,636
Denmark	23,258	21,840	22,056	20,808	20,751	20,292	22,056	22,884
Sweden	9,034	3,664	11,188	10,555	6,041	14,150	15,380	10,399
Greece	15,119	14,345	13,096	12,355	14,006	10,323	11,221	13,379
Luxembourg	n.a.	n.a.	5,200	4,906	2,840	5,342	5,807	3,173
Finland	4,741	2,482	3,917	3,695	2,106	4,375	4,755	2,685
Belgium & Luxembourg	91,582	323,043	-	-	-	-	-	-

Source: Eurostat, 2001

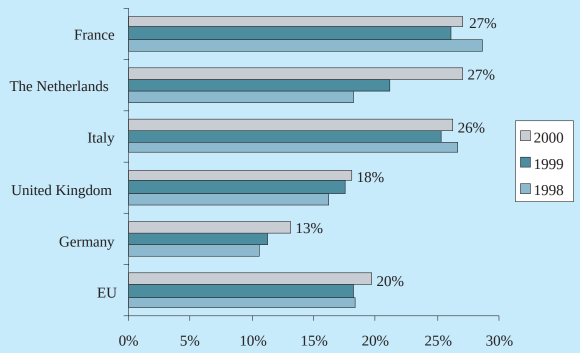
was Italy, accounting for 24 percent of the imported value in 2000, followed by Germany (23%) and the United Kingdom (14%). Besides being a major importer, Germany was also the leading supplier of densified wood to EU member countries, accounting for 17 percent of the imported value in 2000. Other major suppliers were the USA (14%), The Netherlands (10%), Brazil (8%) and Italy (7%).

5.3 The role of the developing countries

While the total imported value of timber and timber products by EU member countries decreased by 5 percent between 1998 and 2000, the imported value originating in developing countries increased by 2 percent. In terms of volume, imports from developing countries increased by 4 percent, which was far less than that registered for total EU volume imports, which increased by 19 percent over the same period. In 2000, imports by EU member countries from developing countries amounted to US$ 4.3 billion or 8.7 million tonnes, accounting for 20 percent of overall value imports and 10 percent of overall volume imports by EU member countries. As shown in Figure 5.9, developing countries played a relatively important role in French, Netherlands and Italian imports of timber and timber products, compared to the EU average.

Wooden frames were the leading timber product group supplied by developing countries. Between 1998 and

Figure 5.9 Share of developing countries in imports of timber and timber products into selected EU countries, 1998-2000, % of imported value

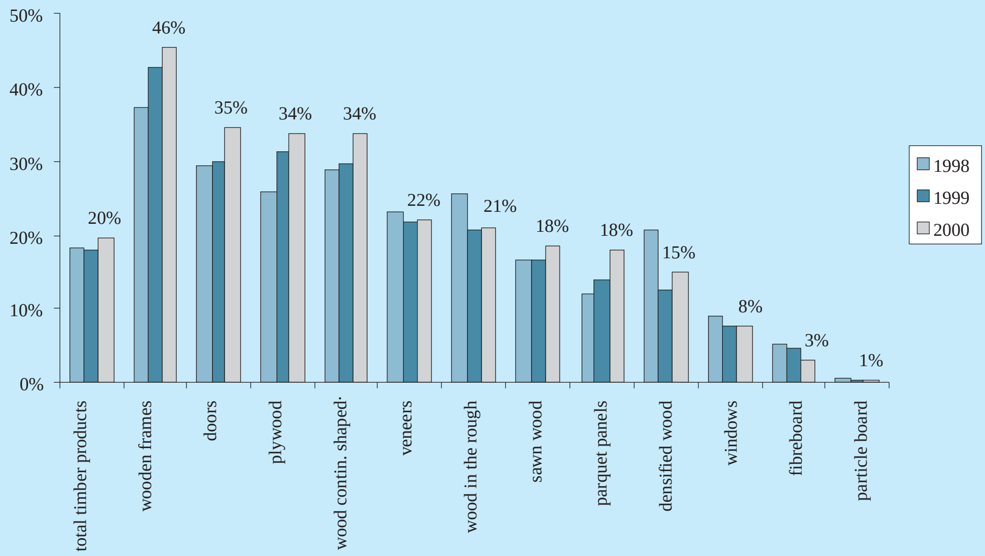


Source: Eurostat, 2001

2000, the share of imports of wooden frames supplied by developing countries increased from 37 percent to 46 percent of the imported value of wooden frames.

Other important product groups for developing country exporters were doors and plywood, of which the share of imports supplied by developing countries also showed significant increases. Imports of densified wood originating in developing countries decreased

Figure 5.10 Share of developing countries in imports of timber and timber products by EU member countries, 1998-2000, % of imported value



Source: Eurostat, 2001

considerably from 21 percent in 1998 to 13 percent in 1999, then slightly recovering to 15 percent in 2000. This was mainly caused by a substantial fall in imports from Indonesia, which formerly used to supply around 8 percent of imports by EU member countries, but accounted for only 3 percent of value imports by 2000.

Among the top fifteen countries supplying the EU with timber and timber products in 2000 were the following developing countries: Indonesia, Brazil and Malaysia. Other important developing country suppliers to the EU were Cameroon, Côte d'Ivoire, Gabon, Slovenia, Croatia and China.

Product groups		Main developing country suppliers (share in % of imported value supplied by developing countries, 2000)	Share DC in total imported value
wooden frames	→	China (69%), Thailand (12%), Indonesia (6%), India (3%), Morocco (2%)	46%
doors	→	Indonesia (30%), South Africa (18%), Brazil (16%), Slovenia (14%), Malaysia (13%), China (5%)	35%
plywood	→	Indonesia (42%), Brazil (37%), Malaysia (8%), Gabon (2%), Chile (1%)	34%
wood cont. shaped	→	Indonesia (42%), Malaysia (12%), China (8%), Brazil (7%), Nigeria (5%), Côte d'Ivoire (5%)	34%
veneers	→	Côte d'Ivoire (21%), Ghana (15%), Cameroon (9%), Croatia (9%), Slovenia (9%), Gabon (7%)	22%
wood in the rough	→	Gabon (26%), Cameroon (19%), Liberia (9%), Congo (9%), Uruguay (6%), Chile (4%)	21%
sawn wood	→	Malaysia (23%), Cameroon (17%), Brazil (15%), Côte d'Ivoire (10%), Croatia (6%),Ghana (5%)	18%
parquet panels	→	China (26%), Indonesia (25%), Malaysia (25%), Thailand (10%), Croatia (9%), Brazil (3%)	18%
densified wood	→	Brazil (54%), Indonesia (18%), China (15%), Malaysia (4%), Sri Lanka (3%)	15%
windows	→	Slovenia (71%), Indonesia (10%), Croatia (4%), Philippines (4%), Malaysia (4%), Congo (2%)	8%
fibreboard	→	Brazil (25%), Slovenia (22%), Chile (22%), Malaysia (13%), South Africa (8%), Turkey (2%)	3%
particle board	→	Slovenia (60%), Brazil (7%), Turkey (7%), Chile (6%), Tunisia (3%), China (2%)	1%
total timber products	→	Indonesia (17%), Brazil (15%), Malaysia (13%), Cameroon (10%), Côte d'Ivoire (6%), Gabon (5%)	20%

Source: Eurostat, 2001 *DC = Developing countries*

6 EXPORTS

In 2000, exports by EU member countries of timber and timber products amounted to more than US$ 17 billion (45 million tonnes), representing a decrease by 2 percent in terms of value but an increase by 16 percent in terms of volume since 1998. Germany and Sweden were the leading exporters of timber and timber products, together accounting for about one third of the total exported value in 2000, followed by Finland (14%), Austria (13%), and France (9%).

In 2000, the leading destinations were Germany, the United Kingdom, Italy, The Netherlands and France, together receiving almost 50 percent of total exports by EU member countries. Most of the trade was intra-EU oriented (69% of total exported value). Leading extra-EU destinations were Japan, USA, Switzerland, Norway, China, Hong Kong, Egypt and Poland.

Between 1998 and 2000, German exports of timber and timber products remained more or less stable in terms of value, fluctuating at around US$ 3 billion. In terms of volume, exports increased by 15 percent, amounting to over 9 million tonnes in 2000.

The United Kingdom was a relatively minor exporter of timber and timber products, with exports amounting to US$ 312 million or 439 thousand tonnes in 2000.

In terms of value, Italian exports of timber and timber products fluctuated at around US$ 1 billion. In terms of volume, however, exports increased by almost 50 percent since 1998, amounting to over 1 million tonnes in 2000.

In 2000, French exports of timber and timber products amounted to US$ 1.6 billion or 6.6 million tonnes, representing a decrease by 3 percent in value, but an increase by 57 percent in volume since 1998.

Between 1998 and 2000, Netherlands exports of timber and timber products decreased by 22 percent in value and by 26 percent in volume, amounting to almost US$ 400 million or 733 thousand tonnes in 2000.

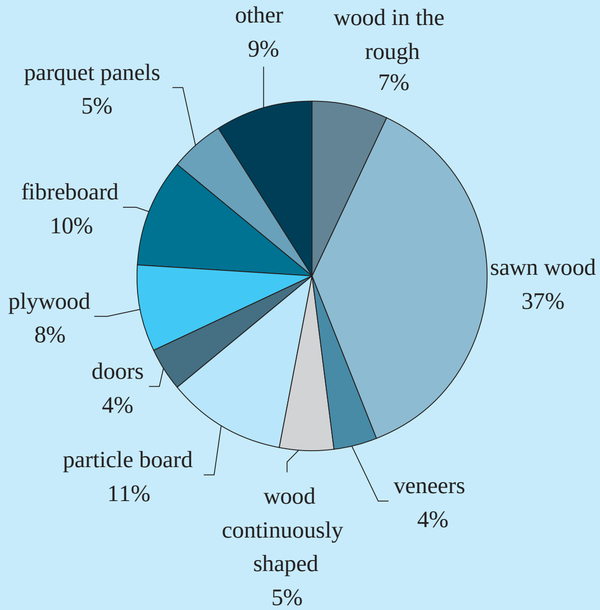
The most important products groups exported by EU member countries were sawn wood, particle board, fibreboard, plywood and wood in the rough. It should be noted that an important share of the exports

Table 6.1 Exports of timber and timber products by EU member countries, 1998-2000
US$ million / € million / 1,000 tonnes

	1998		1999			2000		
	value US$	**volume**	**value US$**	**value €**	**volume**	**value US$**	**value €**	**volume**
Total	17,414	39,185	17,608	16,611	40,581	17,069	18,554	45,334
Extra-EU	4,653	8,449	4,948	4,668	9,372	5,260	5,717	11,469
Germany	2,980	7,968	3,115	2,939	8,144	3,093	3,362	9,155
Sweden	3,091	7,297	2,943	2,777	7,174	2,723	2,960	7,085
Finland	2,571	5,695	2,470	2,330	5,790	2,361	2,567	5,793
Austria	2,073	4,792	2,318	2,187	5,522	2,260	2,456	6,101
France	1,626	4,182	1,591	1,501	4,322	1,583	1,720	6,576
Belgium	n.a.	n.a.	1,446	1,364	3,458	1,470	1,598	3,633
Italy	1,047	746	1,055	995	892	1,040	1,130	1,091
Denmark	672	581	711	671	610	663	720	1,117
Spain	543	1,051	496	468	819	560	609	1,071
Netherlands	510	990	487	459	745	399	433	733
United Kingdom	293	330	322	303	428	312	339	439
Portugal	372	1,599	322	303	1,467	293	319	1,470
Ireland	173	603	166	157	654	167	181	528
Luxembourg	n.a.	n.a.	135	128	504	116	126	473
Greece	41	64	31	29	52	29	32	67
Belgium & Luxembourg	1,422	3,288	-	-	-	-	-	-

Source: Eurostat, 2001

Figure 6.1 Exports of timber and timber products by EU member countries, 2000
% of total value



Source: Eurostat, 2001

consisted of products which were originally produced extra-EU and imported into one EU country before being re-exported to other EU markets.

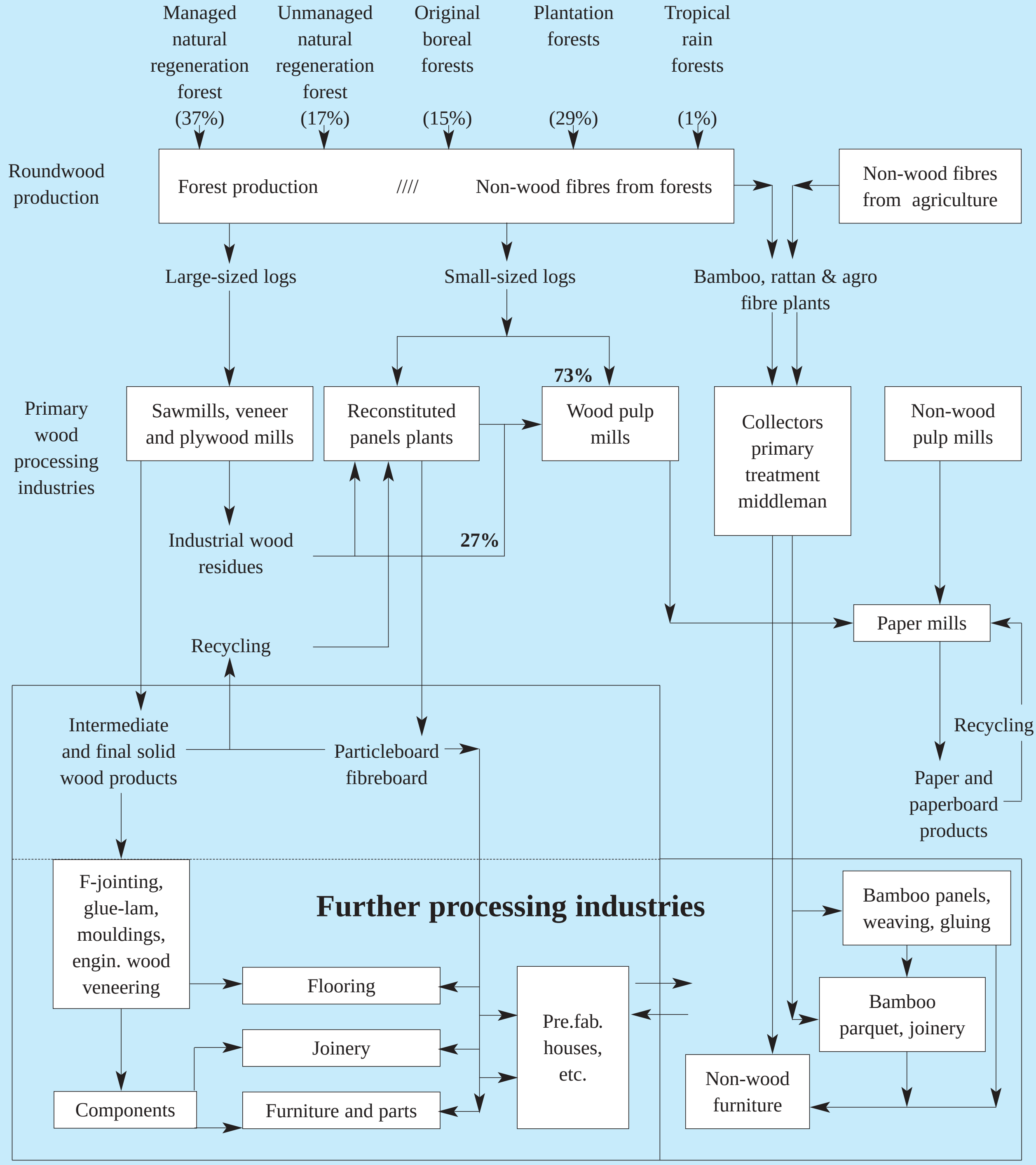
7 TRADE STRUCTURE

7.1 EU trade channels

The route from the producer/manufacturer to the ultimate consumer varies with the kind of timber product. The table below gives an overview of raw material and product flows in forest industries.

The timber trade starts at the location of the forest/concession owner, who may be the exporter as well, but he often sells to exporters or local sawmillers. Sawmills specialised in local wood species are usually located in or near forests/plantations.

Figure 7.1 Raw material and product flows in forest industries



Source: ITC/ITTO, 2001 (percentage figures on raw material flows as reported by IIED, 1996)

Sawmills specialised in imported wood species, on the contrary, often prefer to be established near ports or in the proximity of their customers (e.g. the furniture industry).

Nowadays, the European timber importer is practically always a timber processor. As log exports are decreasing, because tropical timber producers add value domestically, very few importers do primary processing. Importers carry out secondary processing, including: peeling, slicing, dimension cutting, sometimes tertiary processing such as plywood manufacturing and assembling building components.

The closer the exporter can come to the specification required by the last links in the trade chain, the shorter the chain can be. For sawn timber, this demands kiln-drying facilities, planing facilities and transport per container. Wood-based panels have to be covered with melamine or some other foil or a high class veneer. The panel can be cut in specific sizes required by the further processor or in the most popular size of the DIY trade.

The length of the chain is determined by another factor: the closer one comes to the consumer, the smaller the stock holding. Retailers and processors do not house big stocks. The burden of stock carrying falls on the importer. The importer is the link, which can import in bulk, for distribution in smaller parcels to his customers. However, the importer also tries to keep his stocks low and works according to the "just in time" policy. This implies the right product, in the right quantity, at the right price, at the right time. It requires strict adherence to each of the contract terms by each link in the trade chain. It goes without saying that the nearest (in distance) supplier has an advantage.

There is a general trend in the timber trade of direct buying by the timber dealer from the foreign seller, thus circumventing the importer. Thanks to improved communication facilities like Internet (e-commerce) this development will continue to expand over the coming years.

An important development is the creation of buying groups. In some sectors consolidation in the retail sector has created buying groups which have unprecedented leverage. This is placing pressure on distributors, furniture manufacturers and other suppliers to keep their prices low and costs down. These buying groups, about 20, are joined in the Global Forest and Trade Network, which is coordinated by the World Wealth Organisation (WWF). Please refer to Section 3.3 for more information about the Network. Contact details of international buying group can be found at www.panda.org/forests4life/certify_ftncntact.cfm

The demand for FSC certified timber mainly comes from companies, which are often members of buyers' groups. Regional and national Forest and Trade Networks are now established in Europe, North America, South America and Australia. These networks consist of organisations and companies committed to producing and purchasing forest products from well-managed forests and to supporting independent certification. At present, only the FSC meets the requirements of WWF for a credible independent certification scheme.

7.2 Distribution channels for developing country exporters

When choosing distribution channels, the following has to be borne in mind:

Agent

- Protects your interests
- Establishes contact with a number of prospective buyers
- Opens channels to contact buyers outside the EU importing country
- Gives regular market information
- Will ask for sole representation
- Receives an agency commission which may be an important part of the profit
- His services may save substantial costs of travelling

An agent is an interesting channel for smaller exporters aiming to penetrate a local European market.

Importer/trader

- Closer contact with the consumer market
- More indication about product adaptation
- More opportunities to develop valuable personal relationship
- Will ask for exclusivity
- Market information will be given only if it is to his advantage or in his particular product field

An importer/trader is a good distribution channel for sizeable exporters to penetrate the European market.

Importer/processor

- Closer contact with the consumer market
- Product developer
- Highest chances to enter component market
- Greatest flexibility in quality
- Limited or no market information on price development

This distribution channel is interesting for exporters of down-stream timber products, although it involves more risks for the exporter.

Importer for DIY chain

- Best contact with consumer market
- In general interested in low-price bracket products
- Wide range of products

- Publishes monthly/quarterly brochures for his markets which indicate price development
- This transparency gives good price indications, particularly if his colleagues issue similar catalogues/brochures.

This distribution channel is the most challenging one, since retail outlets place great demands on delivery and continuity of the cooperation. This channel is, however, highly profitable for exporters of timber products to the European market.

E-commerce

There is a lot of attention for e-commerce in the timber sector. A number of Internet sites in different countries is developing cooperation arrangements. Although there is not much trade through the Internet yet, exporters should realise that the Internet is becoming an important medium in the timber trade. Interesting links in this respect are www.timberweb.com, www.europages.com, www.houtbeurs.nl and www.woodfacility.com

If your company is FSC certified, important trade channels are the regional and international Forest and Trade Networks. These networks consist of organisations and companies committed to producing and purchasing forest products from well-managed forests and to supporting independent certification. Please refer to www.panda.org/forests4life/certify_ftn.cfm for more information.

Please refer to Appendix 11 for a list of importers of timber and timber products.

Trade fairs are also important meeting points for developing countries' exporters and EU importers. A trade fair is a good opportunity for personal contact between business partners. Please refer to Appendix 6 for contact details of trade fairs. More information on trade fairs is provided in Section 1.6.1 of the EU Strategic Marketing Guide 'Timber and Timber Products'.

8 PRICES AND MARGINS

8.1 Prices and margins

Prices of primary processed timber products began to fall in 1995, and fell more steeply during 1997-1998. Since then, the situation has stabilised and, for some products, the price trend has even been reversed back upwards. Value-added products have fared better in the market turbulence and prices have been more stable (ITC, 2001).

At the end of 2000, meranti and keruing logs were fetching only around 70 percent of the average prices achieved in 1997, while iroko, sapele and obeche/wawa prices were respectively at 160 percent, 125 percent and 105 percent of their 1997 levels. In terms of sawn lumber, meranti and keruing were respectively at 70 percent and 67 percent of their 1997 levels at the end of 2000, compared to 120 percent for sapele and 115 percent for utile.

In November 2001, Indonesia brought in a six-month ban on log exports. This has taken away the intense price competition at the lower end of the market for logs. Regarding sawn timber, pretty much the same market conditions have held through from mid-2001 to early 2002. There has been a pattern of a modest decline in some prices, some species holding firm and then sudden demand surges for particular species as shortages developed in importing countries and buyers had to rush to cover their end users' requirements.

Sapele showed a slight upward price trend in the early months of 2002. Iroko prices fluctuated modestly during the past year, with a more pronounced decrease in the first two months of 2002.

Below we indicate some of the trends during the last year for a limited number of timber products:

- Brazilian mahogany ↑: Risen steadily through restrictions in supply.
- African mahogany ↓
- Meranti, down between June and August 2001, stable since then
- Indonesian plywood ↓
- Brazilian virola plywood ↓
- Brazilian pine plywood ↓

Prices for timber and timber products are highly dependent on several factors, such as the total supply, the type of product, its density, proportions, origin, etc. Therefore, it is recommended to monitor world markets and price movements, in order to be able to set a realistic price. In Table 8.1 we give an example by quoting international prices for plywood from Ghana.

The UK industry says plywood prices must rise in order for traders to obtain a meaningful margin.
There is also a growing sense among Brazilian mills that production cuts rather than price cuts can lead to an improved market situation, which is in the interest of both selling and buying parties.

8.2 Sources of price information

The International Tropical Timber Organisation provides a Tropical Timber Market Report every fortnight containing detailed price information and figures with price trends. This market report is freely available through ITTO's Internet site www.itto.or.jp.
Another source of price information is the German ZMP (www.zmp.de).
Some journals provide information on market prices on an irregular basis (e.g. The Timber Trade Journal and Houtwereld).

Table 8.1 International FOB prices of Ghanaian plywood, 16-31 April 2002, per m³

Redwoods		**Light Woods**			
	WBP	MR	WBP	MR	
4 mm	US$401	US$341	4 mm	US$361	US$306
6 mm	US$331	US$300	6 mm	US$324	US$292
9 mm	US$306	US$288	9 mm	US$293	US$264
12 mm	US$300	US$274	12 mm	US$269	US$246
15 mm	US$303	US$279	15 mm	US$275	US$251
18 mm	US$297	US$275	18 mm	US$268	US$247

WBP: water and boil proof *MR: moisture resistant*
Source: ITTO "Tropical Timber Market Report" (April 2002)

9 OPPORTUNITIES FOR EXPORTERS

A number of developing countries possess significant forest resources. Nevertheless, there are many limitations for efficient and sustainable utilisation of the natural tropical timbers. Most of the constraints are associated with domestic political and economic problems, poor infrastructure, inaccessibility of the resources, and the overall weak capability of the nations to generate investments and new processing capacities. External problems add on to this, as tropical timber has come under threat by environmentalists, and this has created market access limitations for some species (ITC 2001). Please refer also to CBI's EU Strategic Marketing Guide for information on requirements for access to the EU market (product quality, packaging, labelling and environmental standards). Information on relevant trade fairs and magazines as well as a checklist for exporters is included.

Certified timber and timber products
Exporters can use certification (FSC certification is the most relevant for timber from developing countries) as a marketing tool for the promotion of timber on the European market, since forest management certification has become an important market requirement. However, the implementation of forest management certification is costly.

Lesser-known species
It is expected that lesser-known species will become more important and therefore, opportunities in this market segment exist for exporters in developing countries. The FSC certified forest area is growing and, in these management systems, lesser-known species are increasingly cut for commercial use. The development of the WWF Global Trade Network also contributes to increased use of lesser-known species.

At the local market level (e.g. Brazil, Central America), there is some experimentation with lesser-known species. In the EU, The Netherlands takes a leading position in research on lesser-know species, particularly in the construction of roads and water.

In The Netherlands, the following lesser-known species have established a market:
- Calophyllum spp (Solomon Islands)
- Goupia glabra, Hymenaea courbaril, Mezilaurus itauba, Euxylophora paraensis, Micropholis guianensis, Hymenolobium spp, Diplotropis purpurea, Bagassa guianensis (Brazil)
- Lecythis spp (Tropical America)

The Dutch Authority is actively testing new species in the construction of roads and water facilities such as bridges. Private companies in this construction sector are more interested in new species than in the sector of housing construction. Currently, the species seen in the market are Karri (Eucalyptus diversicolor), Louro itauba (Mezilaurus itauba), and Massaranduba (Manilkara huberi).

A number of lesser known species such as Louro Gamela (Nectandra rubra), Sucupira amarela (Qualea paraensis), Sucupira Vermelho (Andira unifoliata), Angelim da Campina (Aldina heterophylla) Guariuba (Clarisia racemosa), Jatoba (Hymenaea courbaril) appears now and then in the Netherlands'garden furniture segment.

Other lesser-known species which have been tested in The Netherlands to assess their opportunities are:
- Cedrelinga catenaeformis, Couratari spp, Caryocar villosum, Aspidosperma spp, Sacoglottis guianensis, Ocotea rubra (Brazil)
- Cordia alliodora (South America)
- Vitex spp, Pometia pinnata, Dillenia spp (Solomon Islands)
- Bailonella toxisperma, Autranella congolensis (Cameroon)
- Palaquium spp (South East Asia)

There is a trend in wooden frames for pictures, paintings photographs and mirrors, to replace common tropical timber species with lesser-known species with similar specifications. Thus, smaller sizes of lesser-known species are more often used now, therefore providing chances for better recovery of forest resources.

For a list of FSC certified tropical species on offer please refer to www.fsc-uk.demon.co.uk/UKsuppliers.html. This list can give you an idea about the various species on the market.

Processed products
The production of large-sized logs from natural forests in the tropical producer countries will continue to decline. The primary and further processing industries have already started to adapt their manufacturing methods, technologies and designs accordingly. Smaller-dimension logs will be increasingly used, based on fast-growing plantations (rubberwood, Gmelina, Acacia, Eucalyptus, and teak) (ITC, 2001).

Trade in secondary processed wood products (including builders' joinery, frames for paintings etc., and mouldings) is growing faster than that of primary products in both temperate and tropical species. However, the comparative advantage derived purely from resource endowment tends to reduce with the increasing degree of processing. Semi-finished products, such as rough sawn lumber, veneer or standard plywood, can be efficiently transported over long distances and further processed practically anywhere. Nevertheless, there are opportunities in secondary processed products such as doors, parquet panels and building components, as long as producers comply strictly with the specification set by importers.

Timber-producing countries are advised to base their competitiveness in value-added wood products on one or more of the following factors (ITC 2001):

- excellent quality of many tropical timbers, which lend themselves well for further processing, and a widening base of sustainably produced utility species from plantation forests;
- low-cost local input (notably wood and labour) to compensate for the high costs of imported input;
- higher total productivity (measured across all factors of production i.e. wood, labour, capital, energy and operating supplies);
- superior quality of products (including design); or preferably
- a balanced combination of all the above factors.

E-commerce

Exporters in developing countries have to make intelligent use of improved communication facilities like Internet (e-commerce). By using these facilities, they may be able to circumvent the importer and trade directly with timber dealers.

APPENDIX 1 NOMENCLATURE

The products in Section 1.1 have the following detailed HS codes:

44031000	Wood in the rough, treated with paint, stains, creosote or other preservatives (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.)
44032000	Coniferous wood in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives).
44032010	Spruce of the kind ‘picea abies karst.’ or silver fir ‘abies alba mill.’, in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives).
44032030	Pine of the kind ‘pinus sylvestris l.’ in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives).
44032090	Coniferous wood in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives; and spruce of the kind ‘picea abies karst.’, silver fir ‘abies alba mill.’ and pine of the kind ‘pinus sylvestris l.’).
440341	Dark red meranti, light red meranti and meranti bakau wood in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives)
44034100	Dark red meranti, light red meranti and meranti bakau wood in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives).
440349	Tropical wood specified in the subheading note 1 to this chapter in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. dark red meranti, light red meranti, meranti bakau; rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives)
440391	Oak ‘quercus spp.’ in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives
44039100	Oak ‘quercus spp.’ in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives)
440392	Beech ‘fagus spp.’ in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives)
44039200	Beech ‘fagus spp.’ in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood in the form of railway sleepers; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives)
440399	Wood in the rough, whether or not stripped of bark or sapwood, or roughly squared (excl. rough-cut wood for walking sticks, umbrellas, tool shafts and the like; wood cut into boards or beams, etc.; wood treated with paint, stains, creosote or other preservatives, coniferous wood in general, oak ‘quercus spp.’, beech ‘fagus spp.’ and tropical wood of subheadings 4403.31 to 4403.35)

4407	Wood sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of > 6 mm
440710	Coniferous wood sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of > 6 mm
440724	Virola, mahogany ‘swietenia spp.’, imbuia and balsa, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of > 6 mm
440725	Dark red meranti, light red meranti and meranti bakau, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of > 6 mm
440726	White lauan, white meranti, white seraya, yellow meranti and alan, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of > 6 mm
440729	Tropical wood specified in subheading note 1 to this chapter, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of > 6 mm (excl. virola, mahogany ‘swietenia spp.’, imbuia, balsa, dark red meranti, light red meranti, meranti bakau, white lauan, white meranti, white seraya, yellow meranti and alan)
440791	Oak ‘quercus spp.’, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of > 6 mm
440792	Beech ‘fagus spp.’, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of > 6 mm
440799	Wood, sawn or cut lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of > 6 mm (excl. tropical wood of subheadings 4407.21 to 4407.23, coniferous wood, oak ‘quercus spp.’ and beech ‘fagus spp.’)
4408	Veneer sheets, sheets for plywood, whether or not spliced, and other wood, sawn lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of =< 6 mm
440810	Veneer sheets and sheets for plywood, whether or not spliced, of coniferous wood and other coniferous wood, sawn lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of =< 6 mm
440831	Veneer sheets and sheets for plywood, whether or not spliced, and other wood, sawn lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of <= 6 mm, of dark red meranti, light red meranti and meranti bakau
440839	Veneer sheets and sheets for plywood, whether or not spliced, and other wood, sawn lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, of a thickness of <= 6 mm, of tropical wood specified in subheading note 1 to this chapter (excl. dark red meranti, light red meranti and meranti bakau)
440890	Veneer sheets and sheets for plywood, whether or not spliced, and other wood, sawn lengthwise, sliced or barked, whether or not planed, sanded or finger-jointed, with a thickness of =< 6 mm (excl. tropical wood of subheading 4408.20 and coniferous wood)
4409	Blocks, strips and friezes for parquet flooring, not assembled, moulded, grooved, tongued, rebated, bevelled, friezed, rounded or similarly worked along one or more edges or faces, whether or not planed, sanded or finger-jointed
440910	Coniferous wood, incl. blocks, strips and friezes for parquet flooring, not assembled, moulded, grooved, tongued, rebated, bevelled, friezed, rounded or similarly worked along one or more edges or faces, whether or not planed, sanded or finger-jointed
440920	wood, incl. blocks, strips and friezes for parquet flooring, not assembled, moulded, grooved, tongued, rebated, bevelled, friezed, rounded or similarly worked along one or more edges or faces, whether or not planed, sanded or finger-jointed (excl. coniferous wood)
4410	Particle board and similar board of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents (excl. fibreboard, veneered particle board, hollow-core composite panels and board of ligneous materials agglomerated with cement, plaster or other mineral bonding agents)
441011	Waferboard, incl. oriented strand board
441019	Particle board and similar board, of wood, whether or not agglomerated with resins or other organic bonding agents (excl. waferboard and oriented strand board, fibreboard, veneered particle board and hollow-core composite panels)
441090	Particle board and similar board, of particles of bagasse, bamboo or cereal straw, or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents (excl. fibreboard, hollow-core composite panels, veneered particle board, board of other ligneous materials, agglomerated with cement, plaster or other mineral bonding agents, plus particle board of wood)

4411	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents (excl. particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; furniture components identifiable as such)
441111	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of > 0.8 g per cc, not mechanically worked or surface-coated (excl. particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; furniture components identifiable as such)
441119	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of > 0.8 g per cc, mechanically worked or surface-coated (excl. sanded only; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441121	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of > 0.5 g to 0.8 g per cc, (excl. mechanically worked or surface-coated; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441129	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or organic bonding agents, with a density of > 0.5 g to 0.8 g per cc, mechanically worked or surface-coated (excl. sanded only; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441131	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of > 0.35 g to 0.5 g per cc (excl. mechanically worked or surface-coated; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441139	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or organic bonding agents, with a density of > 0.35 g to 0.5 g per cc, mechanically worked or surface-coated (excl. sanded only; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441191	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of =< 0.35 g per cc (excl. mechanically worked or surface-coated; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
441199	Fibreboard of wood or other ligneous materials, whether or not agglomerated with resins or other organic bonding agents, with a density of =< 0.35 g per cc, mechanically worked or surface-coated (excl. sanded only; particle board, whether or not bonded with one or more sheets of fibreboard; laminated wood with a layer of plywood; composite panels with outer layers of fibreboard; paperboard; identifiable furniture components)
4412	Plywood, veneered wood and similar laminated wood (excl. sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
44121100	Plywood consisting solely of sheets of wood =< 6 mm thick, with at least one outer ply of the following tropical woods: dark red meranti, light red meranti, white lauan, utile, limba, okoume, obeche, african mahogany, sapele, baboen, mahogany ‘swietenia spp.’, rio rosewood ‘brazilian rosewood’ or female rosewood, n.e.s.
44121200	Plywood consisting solely of sheets of wood =< 6mm thick, with at least one outer ply of non-coniferous wood (excl. sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
44121900	Plywood consisting solely of sheets of wood =< 6 mm thick (excl. plywood of subheadings 4412.11 and 4412.12; sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)

441229	Veneered wood and similar laminated wood with at least one outer ply of non-coniferous wood but not containing particle board (excl. plywood, sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
44122910	Veneered wood and similar laminated wood with at least one outer ply of non-coniferous wood and a block, lamina or batten core (excl. sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
44122990	Veneered wood and similar laminated wood with at least one outer ply of non-coniferous wood but not containing particle board or a block, lamina or batten core (excl. plywood, sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
44129100	Veneered wood and similar laminated wood with at least one particle board (excl. wood of subheadings 4412.21; hollow-core composite panels and sheets identifiable as furniture components)
441299	Veneered wood and similar laminated wood not containing particle board (excl. wood of subheadings 4412.29; plywood, sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
44129910	Veneered wood and similar laminated wood with a block, lamina or batten core (excl. wood of headings 4412.29-10; sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
44129990	Veneered wood and similar laminated wood not containing particle board and without a block, lamina or batten core (excl. Wood of subheadings 4412.29-10; sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
441213	Plywood consisting solely of sheets of wood <= 6 mm thick, with at least one outer ply of tropical wood specified in subheading note 1 to this chapter (excl. sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
441214	Plywood consisting solely of sheets of wood <= 6 mm thick, with at least one outer ply of non-coniferous wood or other tropical wood than specified in subheading note 1 to this chapter (excl. sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
441219	Plywood consisting solely of sheets of wood =< 6 mm thick (excl. plywood of subheadings 4412.11 and 4412.12; sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
441222	Veneered wood and similar laminated wood with at least one outer ply of tropical wood specified in subheading note 1 to this chapter (excl. sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
441223	Veneered wood and similar laminated wood with at least one outer ply of non-coniferous wood or other tropical wood than specified in subheading note 1 to this chapter and containing at least one layer of particle board (excl. hollow-core composite panels and sheets identifiable as furniture components)
441229	Veneered wood and similar laminated wood with at least one outer ply of non-coniferous wood but not containing particle board (excl. plywood, sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
441292	Veneered wood and similar laminated wood with at least one ply of a tropical wood specified in subheading note 1 to this chapter (excl. wood of subheading no 4412.22, sheets of compressed wood, hollow-core composite panels, inlaid wood and sheets identifiable as furniture components)
441293	Veneered wood and similar laminated wood with at least one layer of particle board (excl. wood of subheading no 4412.23, hollow-core composite panels and sheets identifiable as furniture components)
441299	Veneered wood and similar laminated wood not containing particle board (excl. wood of subheadings 4412.29; plywood, sheets of compressed wood, hollow-core composite panels, parquet panels or sheets, inlaid wood and sheets identifiable as furniture components)
44140000	Wooden frames for pictures, photographs, mirrors and the like
4418	Joinery and carpentry, incl. Hollow-core composite panels, parquet panels, shingles and shakes, of wood (excl. plywood panelling, blocks, strips and friezes for parquet flooring, not assembled, and pre-fabricated buildings)
44181000	Windows, french windows and their frames and coverings, of wood
44182000	Doors and their frames, coverings and sills, of wood
441830	Parquet panels of wood (excl. blocks, strips and friezes for parquet flooring, not assembled)
44183010	Parquet panels for mosaic flooring, of wood (excl. blocks, strips and friezes for parquet flooring, not assembled)
44183090	Parquet panels of wood (excl. mosaic flooring, blocks, strips and friezes for parquet flooring, not assembled)

44184000	Wooden shuttering for concrete work (excl. plywood boarding)
44185000	Shingles and shakes, of wood
44189000	Joinery and carpentry, incl. Hollow-core composite panels (excl. windows, french windows and their frames and coverings, doors and their frames, coverings and sills, parquet panels, blocks, strips and friezes, wooden shuttering for concrete work, shingles, shakes and prefabricated buildings)

Countries falling under the groups mentioned in Section 1.2 of the EU Strategic Marketing Guide "Timber and timber products".

SPGA
Afghanistan, Angola, Bangladesh, Burkina Faso, Burundi, Benin, Bhutan, Congo, Central African Republic, Cape Verde, Djibouti, Eritrea, Ethiopia, Gambia, Guinea, Equatorial Guinea, Guinea-Bissau, Haiti, Cambodia, Kiribati, Comoros (excl. Mayotte), Laos, Liberia, Lesotho, Madagascar, Mali, Myanmar, Mauritania, Maldives, Malawi, Mozambique, Niger, Nepal, Rwanda, Salomon Islands, Sudan, Sierra Leone, Somalia, Sao Tomé & Principe, Chad, Togo, Tuvalu, Tanzania, Uganda, Vanuatu, Samoa, Yemen, Zambia.

SPGE
Bolivia, Colombia, Costa Rica, Ecuador, Guatemala, Honduras, Nicaragua, Panama, Peru, El Salvador, Venezuela

SPGI
United Arab Emirates, Antigua and Barbuda, Anguilla, Armenia, Netherlands Antilles, Antarctica, Argentina, American-Samoa, Aruba, Azerbaijan, Barbados, Bahrain, Bermuda, Brunei, Brazil, Bahamas, Bouvet Island, Botswana, Belarus, Belize, Cocos Islands, Congo (Republic), Ivory Coast, Cook Islands, Chile, Cameroon, China, Cuba, Christmas Island, Cyprus, Dominica, Dominican Republic, Algeria, Egypt, Fiji, Falkland Islands, Micronesia, Gabon, Grenada, Georgia, Ghana, Gibraltar, Greenland, South Georgia and the South Sandwich Islands, Guam, Guyana, Heard and McDonald Islands, Indonesia, India, British Oceania, Iraq, Iran, Jamaica, Jordan, Kenya, Kyrgyz Republic, St. Kitts-Nevis, Kuwait, Cayman Islands, Kazakhstan, Lebanon, St. Lucia, Sri Lanka, Libya, Morocco, Moldavia, Marshall Islands, Mongolia, Macao, Montserrat, Mauritius, Mexico, Malaysia, Namibia, New Caledonia, Norfolk, Nigeria, Nauru, Niue Island, Oman, French Polynesia, Papua-New-Guinea, Philippines, Pakistan, St Pierre and Miquelon, Pitcairn, Palau, Paraguay, Qatar, Russia, Saudi-Arabia, Seychelles, St Helena, Senegal, Surinam, Syria, Swaziland, Turks & Caicos Islands, French Southern Areas, Thailand, Tajikistan, Tokelau Islands, Turkmenistan, Tunisia, Tonga, Trinidad and Tobago, Ukraine, Uruguay, Uzbekistan, St Vincent (VC), British Virgin Islands, Virgin Islands (USA), Vietnam (VN), Wallis and Futuna Islands, Republic of South Africa, Zimbabwe

APPENDIX 2 DETAILED IMPORT/EXPORT STATISTICS

The source of the data presented below is Eurostat COMEXT 2001.

IMPORTS

Imports of timber and timber products by EU member countries, by country of origin, 1998-2000
US$ million / € million / thousand tonnes

	1998		1999			2000		
	Value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	22,794	70,711	22,500	21,226	76,252	21,713	23,601	84,185
Extra-EU	10,693	39,448	10,890	10,273	44,501	11,002	11,959	48,353
Developing countries	4,174	8,423	4,081	3,850	8,038	4,270	4,641	8,746
Leading suppliers:								
Germany	1,920	6,730	2,026	1,911	7,439	2,002	2,176	8,800
Sweden	2,245	4,703	2,006	1,893	4,437	1,713	1,862	4,189
Finland	1,861	3,917	1,730	1,632	3,723	1,573	1,710	3,706
USA	1,484	1,446	1,253	1,182	1,159	1,281	1,393	1,162
Austria	1,349	3,656	1,341	1,265	3,904	1,174	1,276	3,991
France	1,252	4,259	1,156	1,091	4,461	1,153	1,253	6,974
Russia	937	10,680	1,117	1,054	13,547	1,138	1,237	14,130
Belgium	n.a.	n.a.	926	874	2,811	867	943	2,722
Indonesia	733	815	700	661	801	731	795	772
Latvia	617	5,038	643	606	4,985	690	750	5,987
Brazil	487	1,323	525	496	1,222	625	680	1,562
Malaysia	505	652	498	470	583	549	596	562
Canada	582	581	535	505	556	532	579	496
Poland	523	1,253	547	516	1,398	522	568	1,387
Italy	535	386	490	462	382	447	486	390
Czech Republic	484	2,591	541	510	3,131	447	485	2,692
Cameroon	508	1,180	422	398	985	440	478	964
Switzerland	364	1,193	381	359	1,308	432	469	3,020
The Netherlands	461	1,122	429	405	1,107	375	407	1,034
Estonia	316	3,148	372	351	3,757	356	387	3,779

Imports of timber and timber products into GERMANY, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	Value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	4,627,958	8,529,069	4,264,947	4,023,535	9,132,760	3,577,757	3,888,866	8,884,443
Extra-EU	2,112,237	4,286,360	2,120,260	2,000,245	5,157,707	1,946,216	2,115,452	5,089,403
Developing countries	489,713	591,086	481,313	454,069	623,276	469,391	510,208	648,206
Leading suppliers:								
Finland	458,500	766,238	414,086	390,647	798,478	322,246	350,267	619,872
Austria	434,608	724,941	405,488	382,536	689,195	304,069	330,510	587,888
Poland	297,848	660,309	300,110	283,123	715,669	263,551	286,469	656,669
Sweden	479,530	757,756	382,587	360,931	693,324	253,318	275,346	552,135
USA	295,228	213,701	213,065	201,005	127,680	211,928	230,357	125,949
Czech Rep.	225,068	878,272	248,954	234,862	971,478	198,084	215,309	737,315
France	274,011	509,764	220,161	207,699	465,284	182,815	198,712	690,199
Belgium	n.a.	n.a.	192,143	181,267	795,369	151,314	164,472	651,496
Italy	224,248	137,867	183,026	172,666	112,476	147,375	160,190	102,204
Switzerland	143,832	256,990	141,974	133,938	291,880	135,532	147,317	391,100
Indonesia	138,187	143,160	126,239	119,093	139,842	129,170	140,402	135,876
Russia	74,220	285,726	113,992	107,540	692,576	129,130	140,359	883,403

Imports of timber and timber products into the UNITED KINGDOM, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	Value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	3,360,137	6,406,492	3,320,740	3,132,774	6,277,189	3,391,263	3,686,155	6,940,323
Extra-EU	1,535,363	2,799,806	1,576,067	1,486,856	2,977,448	1,649,359	1,792,781	3,345,938
Developing countries	540,766	670,796	581,063	548,173	731,759	611,143	664,286	752,291
Leading suppliers:								
Sweden	616,632	1,357,857	588,690	555,368	1,279,087	525,211	570,882	1,277,509
Finland	424,039	852,474	366,653	345,899	792,265	376,904	409,678	895,637
Latvia	266,951	930,675	290,036	273,619	1,046,948	321,749	349,727	1,288,663
USA	278,377	275,457	205,699	194,056	168,666	217,127	236,008	175,780
Germany	139,636	208,670	156,895	148,014	207,527	194,395	211,299	303,711
Indonesia	150,520	176,772	157,049	148,159	192,383	157,868	171,596	172,552
Brazil	102,144	123,158	124,942	117,870	174,748	157,570	171,272	250,844
Canada	134,320	188,005	136,859	129,112	182,902	146,150	158,859	183,226
Ireland	135,947	386,581	147,073	138,748	349,269	137,624	149,591	336,705
Belgium	n.a.	n.a.	99,758	94,111	215,862	131,375	142,799	257,387
Malaysia	131,112	178,411	123,436	116,449	148,462	113,082	122,915	121,953
Russia	99,650	256,846	103,014	97,183	304,907	108,341	117,762	379,722

Imports of timber and timber products into ITALY, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	3,282,942	10,060,500	3,259,510	3,075,009	10,175,204	3,116,778	3,387,802	11,180,474
Extra-EU	1,684,764	4,599,521	1,658,351	1,564,482	4,532,272	1,609,684	1,749,656	5,073,056
Developing countries	872,607	1,855,285	825,088	778,385	1,749,475	816,438	887,433	1,933,476
Leading suppliers:								
Austria	819,204	2,759,115	844,042	796,266	3,062,344	769,418	836,324	3,231,801
Germany	278,750	1,102,741	283,908	267,838	1,097,332	290,784	316,070	1,300,131
USA	241,250	266,489	226,333	213,522	256,892	219,949	239,075	258,684
France	222,305	1,061,342	203,147	191,648	974,793	183,841	199,827	1,047,819
Cameroon	138,433	257,565	113,698	107,262	214,462	125,536	136,452	236,162
Switzerland	120,500	714,697	123,758	116,753	720,392	112,006	121,746	959,494
Croatia	123,791	447,918	118,214	111,523	411,027	107,964	117,352	529,902
Côte d’Ivoire	118,087	142,840	104,341	98,435	124,403	95,571	103,881	128,864
Finland	112,086	184,410	103,426	97,572	174,416	93,822	101,980	168,260
Russia	99,514	275,312	98,637	93,054	294,559	93,370	101,489	327,260
Canada	80,731	70,068	85,590	80,745	74,650	78,089	84,879	59,949
Hungary	88,138	817,770	78,454	74,013	694,215	70,565	76,701	682,334

Imports of timber and timber products into FRANCE, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,849,317	4,043,902	1,889,091	1,782,161	4,380,505	1,950,417	2,120,018	4,753,773
Extra-EU	791,204	1,665,021	763,891	720,652	1,774,163	833,346	905,811	2,007,590
Developing countries	529,399	1,140,775	492,560	464,679	1,127,443	527,423	573,286	1,174,032
Leading suppliers:								
Germany	269,468	707,479	278,518	262,753	771,558	282,245	306,788	876,713
Belgium	n.a.	n.a.	258,041	243,435	672,019	252,109	274,032	678,333
Finland	190,191	422,677	214,885	202,722	476,378	193,456	210,278	460,526
Gabon	116,068	341,420	119,696	112,921	342,767	121,396	131,952	376,438
Brazil	88,987	130,126	85,824	80,966	160,868	104,685	113,788	190,386
Sweden	102,664	240,790	110,722	104,455	239,642	98,680	107,261	224,019
Italy	67,835	46,480	66,713	62,937	49,048	71,269	77,466	57,886
USA	80,173	81,220	66,822	63,040	66,979	64,224	69,809	62,798
Spain	52,306	223,672	52,146	49,194	200,467	60,911	66,208	231,603
Russia	39,245	121,206	44,724	42,192	156,088	57,848	62,878	218,461
Cameroon	73,802	202,936	65,132	61,445	174,234	53,824	58,504	113,871
Indonesia	49,307	50,560	38,589	36,405	42,420	46,285	50,310	49,240

Imports of timber and timber products into THE NETHERLANDS, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,769,880	3,810,782	1,776,494	1,675,938	3,680,234	1,641,134	1,783,841	3,583,670
Extra-EU	685,668	1,291,365	722,141	681,265	1,329,533	789,821	858,501	1,533,311
Developing countries	322,177	487,581	375,554	354,296	520,092	442,783	481,286	617,179
Leading suppliers:								
Belgium	n.a.	n.a.	257,441	242,869	585,053	222,213	241,536	554,118
Malaysia	124,916	160,735	140,662	132,700	154,948	170,069	184,858	155,609
Sweden	237,903	592,827	197,751	186,558	486,635	153,444	166,787	390,871
Germany	198,330	474,251	197,232	186,068	575,527	148,410	161,315	462,319
Finland	164,600	539,622	161,091	151,973	348,439	140,767	153,008	338,711
Indonesia	81,932	84,356	88,669	83,650	91,651	112,575	122,364	87,521
France	110,304	140,603	113,279	106,867	147,045	98,570	107,141	139,574
Russia	52,269	195,654	59,726	56,345	226,908	74,815	81,321	295,859
USA	71,177	85,900	43,033	40,597	41,062	53,182	57,807	49,201
Cameroon	29,122	109,657	33,161	31,284	106,827	45,054	48,972	134,813
Canada	42,691	38,993	44,729	42,197	40,691	44,535	48,408	36,192
Brazil	23,663	48,176	30,933	29,182	65,035	35,852	38,970	85,362

Imports of wood in the rough by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	3,309,561	35,557,416	3,325,490	3,137,255	39,894,703	3,174,015	3,450,016	45,276,729
Extra-EU	2,183,310	24,855,963	2,248,045	2,120,797	28,399,821	2,146,821	2,333,501	30,774,315
Developing countries	847,475	4,056,141	688,329	649,367	3,425,648	667,211	725,229	3,690,025
Leading suppliers:								
Russia	466,323	9,295,448	584,736	551,638	11,737,568	532,230	578,511	11,843,436
Germany	348,193	3,957,729	357,680	337,434	4,221,470	333,013	361,971	5,114,117
France	285,520	2,546,868	258,093	243,484	2,767,724	308,424	335,243	4,766,550
Gabon	186,803	603,743	169,788	160,177	554,846	174,746	189,941	611,210
Switzerland	91,012	780,377	95,071	89,690	849,133	163,478	177,693	2,499,129
Latvia	182,892	3,621,946	149,647	141,176	3,297,320	162,403	176,525	4,030,985
USA	115,205	172,592	114,183	107,720	185,457	145,557	158,214	213,640
Estonia	156,747	2,669,582	175,927	165,969	3,186,487	137,822	149,807	3,103,405
Cameroon	286,779	840,546	203,673	192,144	617,200	128,388	139,552	410,151
Czech Rep.	126,987	1,542,883	146,288	138,008	1,901,960	88,452	96,144	1,463,357
Austria	82,914	653,999	86,847	81,931	776,715	71,421	77,632	790,429
Belgium	n.a.	n.a.	102,659	96,848	1,136,791	69,699	75,760	975,113

Imports of sawn wood by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	9,034,879	21,554,563	8,930,103	8,424,625	22,600,079	8,722,324	9,480,787	24,447,204
Extra-EU	4,416,261	9,773,113	4,552,184	4,294,513	11,101,627	4,737,844	5,149,830	12,325,940
Developing countries	1,496,172	2,476,801	1,492,636	1,408,147	2,576,898	1,611,202	1,751,306	2,869,094
Leading suppliers:								
Sweden	1,673,664	4,005,251	1,480,688	1,396,875	3,666,177	1,284,862	1,396,589	3,490,560
Finland	1,105,152	2,778,428	1,040,311	981,425	2,577,203	957,229	1,040,466	2,617,918
USA	822,146	804,511	761,113	718,031	778,966	760,371	826,490	760,741
Austria	683,562	2,086,252	671,918	633,885	2,194,666	592,285	643,788	2,255,392
Germany	429,137	1,252,897	475,758	448,828	1,469,123	464,013	504,362	1,690,131
Russia	329,475	1,115,925	391,027	368,893	1,513,320	453,844	493,309	1,937,756
Latvia	337,223	1,267,941	392,240	370,038	1,528,262	418,830	455,250	1,783,892
Canada	418,700	416,311	386,710	364,821	402,371	403,092	438,144	388,464
Malaysia	295,975	403,663	301,639	284,565	363,077	367,575	399,538	388,650
Cameroon	181,900	305,438	186,880	176,302	340,034	276,705	300,766	520,961
Brazil	210,235	364,107	218,913	206,522	435,040	239,444	260,265	494,391

Imports veneers by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,179,396	577,185	1,116,072	1,052,898	542,644	1,096,542	1,191,894	581,388
Extra-EU	675,128	346,287	632,922	597,096	329,759	630,491	685,316	352,949
Developing countries	274,460	208,123	242,992	229,238	185,938	242,295	263,364	206,638
Leading suppliers:								
USA	265,395	72,037	251,673	237,427	68,511	254,754	276,906	67,200
Germany	173,302	49,209	177,512	167,464	46,430	176,864	192,243	54,036
France	81,483	44,460	76,239	71,924	36,812	72,888	79,226	43,654
Côte d’Ivoire	58,433	57,380	52,894	49,900	51,914	50,917	55,345	56,135
Italy	54,652	12,370	45,188	42,630	11,190	46,962	51,046	13,561
Spain	28,384	16,490	37,103	35,003	18,758	37,260	40,500	20,362
Ghana	38,093	23,736	37,969	35,820	27,590	36,781	39,979	29,930
Switzerland	39,403	8,337	35,279	33,282	7,753	33,229	36,119	8,748
Belgium	n.a.	n.a.	35,696	33,675	16,797	30,334	32,972	14,020
Finland	30,768	33,857	32,349	30,518	32,451	29,411	31,969	32,785
Canada	27,254	8,041	24,312	22,936	7,150	25,911	28,164	7,564
Cameroon	29,325	24,716	20,059	18,924	16,689	21,304	23,156	20,418

Imports of continuously shaped wood by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	939,571	995,737	954,343	900,324	1,116,127	941,020	1,022,848	1,258,897
Extra-EU	408,673	359,727	425,312	401,238	390,816	470,448	511,357	454,579
Developing countries	271,825	227,730	282,794	266,787	247,469	317,037	344,605	286,518
Leading suppliers:								
Indonesia	116,844	105,226	109,610	103,406	104,157	131,896	143,365	126,918
Italy	109,436	21,490	101,933	96,163	22,663	85,473	92,905	22,141
Germany	56,981	48,943	65,258	61,564	88,914	62,409	67,836	139,792
Sweden	74,287	108,394	64,967	61,290	107,683	52,975	57,582	95,719
Austria	56,353	62,436	59,755	56,373	69,521	46,830	50,902	66,032
France	53,236	136,547	52,078	49,130	136,350	43,881	47,697	202,864
The Netherlands	40,235	152,969	39,136	36,921	185,501	37,941	41,240	157,669
Malaysia	36,464	32,204	35,034	33,051	31,158	37,764	41,048	33,232
Finland	41,027	43,493	37,507	35,384	41,695	33,560	36,478	36,301
Canada	23,570	15,063	27,361	25,812	17,183	32,794	35,646	19,534
Poland	18,908	25,549	21,783	20,550	28,912	28,777	31,279	39,872

Imports of particle board by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,679,093	4,607,120	1,629,848	1,537,592	4,683,089	1,440,901	1,566,197	4,619,707
Extra-EU	242,096	794,640	258,500	243,868	925,950	227,678	247,476	863,878
Developing countries	12,534	38,359	8,433	7,956	27,417	7,855	8,538	32,258
Leading suppliers:								
Germany	329,668	757,042	311,960	294,302	754,148	316,036	343,517	875,935
Belgium	n.a.	n.a.	258,369	243,744	890,267	226,769	246,488	883,469
Austria	217,680	599,616	194,351	183,350	580,471	166,676	181,170	571,770
France	191,813	545,153	177,692	167,634	546,555	138,190	150,207	485,423
Sweden	51,232	95,475	81,924	77,287	105,286	75,422	81,980	99,947
Switzerland	81,687	227,863	81,518	76,904	240,756	70,352	76,470	235,713
Poland	50,538	148,900	68,288	64,423	231,175	67,129	72,966	209,318
Italy	62,348	72,692	59,250	55,896	94,321	50,956	55,387	80,854
Portugal	52,003	190,258	56,853	53,635	223,902	47,578	51,715	235,822
Ireland	23,707	99,195	53,039	50,037	169,688	40,601	44,131	136,543
Norway	37,456	131,224	36,977	34,884	148,033	39,085	42,484	177,425
Finland	33,939	92,288	33,357	31,469	98,901	30,084	32,700	108,632

Imports of fibreboard by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	1,277,071	3,164,192	1,212,003	1,143,399	2,905,894	1,254,334	1,363,406	3,182,960
Extra-EU	308,989	803,732	285,801	269,624	757,325	263,160	286,043	747,765
Developing countries	66,123	198,670	54,904	51,796	165,115	36,339	39,499	107,356
Leading suppliers:								
Germany	238,463	468,382	274,716	259,166	572,334	283,550	308,206	618,316
France	99,570	231,230	90,986	85,836	237,580	143,590	156,076	386,465
Belgium	n.a.	n.a.	87,810	82,840	209,632	117,390	127,598	232,239
Ireland	87,769	191,775	85,393	80,559	183,284	89,690	97,489	174,666
Spain	83,022	200,698	76,711	72,369	208,797	75,903	82,503	233,582
Switzerland	36,159	48,798	52,188	49,234	81,403	67,171	73,012	149,420
Portugal	106,900	562,501	78,473	74,031	236,927	66,303	72,068	236,951
Austria	53,960	94,932	55,415	52,278	102,297	49,925	54,266	111,213
Poland	63,746	187,292	60,009	56,612	186,253	49,766	54,093	170,442
Luxembourg	n.a.	n.a.	42,642	40,228	115,512	47,351	51,469	158,974
Italy	64,908	146,384	50,010	47,179	117,207	45,549	49,510	115,290
USA	42,948	44,241	30,109	28,405	30,046	26,666	28,985	24,875

Imports of plywood by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	2,297,010	2,744,887	2,167,613	2,044,918	2,794,909	2,066,997	2,246,736	2,922,615
Extra-EU	1,231,735	1,798,500	1,145,688	1,080,838	1,757,427	1,131,230	1,229,598	1,885,816
Developing countries	593,849	860,820	673,823	635,682	1,028,589	698,280	759,000	1,140,834
Leading suppliers:								
Finland	419,689	361,981	398,310	375,764	390,575	378,890	411,837	407,632
Indonesia	331,705	484,529	324,299	305,942	483,228	292,668	318,117	433,531
Brazil	114,299	175,888	183,535	173,146	320,337	259,481	282,045	504,836
Russia	126,405	227,140	124,137	117,110	255,934	134,536	146,235	312,434
France	163,437	135,266	154,495	145,750	131,288	126,989	138,032	130,794
Germany	96,557	79,320	90,635	85,505	126,626	96,945	105,375	103,187
Belgium	n.a.	n.a.	104,125	98,231	130,233	86,533	94,058	126,850
Italy	88,314	63,565	83,319	78,603	62,714	67,150	72,989	60,431
Latvia	56,099	63,858	50,260	47,415	62,786	55,112	59,904	77,386
Malaysia	76,980	130,179	70,245	66,269	113,863	52,850	57,446	81,670
Austria	46,011	37,179	48,046	45,326	41,766	48,102	52,285	44,735
Czech Republic	33,696	43,771	35,959	33,924	52,046	35,033	38,079	58,199

Imports of densified wood by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	67,893	83,127	73,183	69,041	108,045	74,906	81,420	125,309
Extra-EU	27,914	32,141	27,261	25,718	33,265	33,495	36,408	46,724
Developing countries	13,965	16,024	9,226	8,704	11,819	11,422	12,415	16,919
Leading suppliers:								
Germany	8,997	12,809	12,084	11,400	24,743	12,613	13,710	26,137
USA	7,594	7,605	10,193	9,616	10,237	10,409	11,314	11,159
The Netherlands	6,561	10,166	8,253	7,786	15,169	7,540	8,196	17,251
Brazil	5,441	8,500	4,485	4,231	7,132	6,206	6,746	11,489
Italy	5,671	2,348	6,608	6,234	3,719	5,255	5,712	3,838
Poland	1,137	2,228	2,077	1,959	3,868	3,416	3,713	7,534
Austria	5,253	6,029	6,011	5,671	9,475	3,034	3,298	6,711
France	2,507	2,858	2,218	2,092	3,059	2,924	3,178	8,732
Indonesia	5,504	4,815	2,016	1,902	1,744	2,072	2,252	1,591

Imports of wooden frames by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	190,473	53,429	211,366	199,402	63,623	201,772	219,317	68,393
Extra-EU	97,252	30,198	121,124	114,268	40,941	123,175	133,886	45,921
Developing countries	70,746	21,462	89,991	84,897	29,830	91,851	99,838	32,983
Leading suppliers:								
China	44,862	14,682	62,085	58,571	22,220	63,530	69,054	24,567
Italy	34,133	7,209	30,611	28,878	6,369	23,311	25,338	5,288
Belgium	n.a.	n.a.	12,971	12,237	2,947	15,107	16,421	4,365
Thailand	10,063	2,090	9,944	9,381	1,970	10,866	11,811	2,447
The Netherlands	9,314	2,195	12,328	11,630	3,964	10,090	10,967	4,188
France	8,623	2,775	8,970	8,462	2,362	8,032	8,730	2,173
Poland	7,444	3,055	8,456	7,977	3,926	7,171	7,795	3,851
Germany	7,223	1,569	7,101	6,699	1,679	6,498	7,063	1,877
Czech Republic	3,529	945	4,256	4,015	1,196	5,496	5,974	1,796
Indonesia	2,977	972	5,960	5,623	2,197	5,188	5,639	1,878
United Kingdom	5,704	1,225	5,335	5,033	918	4,387	4,769	868
Romania	594	308	1,539	1,452	878	3,824	4,156	2,658

Imports of windows by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	459,395	117,286	439,116	414,260	107,986	375,023	407,634	103,712
Extra-EU	170,229	57,538	165,083	155,739	49,731	137,230	149,163	44,857
Developing countries	41,953	11,483	33,975	32,052	9,818	29,017	31,540	9,198
Leading suppliers:								
Denmark	152,561	31,093	150,491	141,973	30,848	138,654	150,711	32,574
Poland	50,379	23,808	47,229	44,556	18,282	39,272	42,687	15,567
Norway	21,787	3,646	28,561	26,944	4,727	23,661	25,719	4,263
Slovenia	32,274	6,904	26,545	25,042	5,991	20,480	22,261	5,223
Austria	28,464	4,267	29,992	28,294	4,798	20,119	21,869	4,086
France	34,792	8,470	27,164	25,626	6,810	19,982	21,720	6,595
United Kingdom	22,098	4,834	18,183	17,154	3,850	17,982	19,546	3,818
Germany	20,814	3,572	13,560	12,792	2,447	13,393	14,558	4,699
Switzerland	17,817	3,587	16,141	15,227	3,463	11,642	12,654	2,994

Imports of doors by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	728,553	297,594	711,806	671,515	311,672	646,794	703,037	314,990
Extra-EU	304,694	157,404	312,821	295,114	173,357	328,629	357,205	189,213
Developing countries	213,684	110,337	212,072	200,068	115,956	223,612	243,056	121,957
Leading suppliers:								
Indonesia	66,839	34,620	57,517	54,261	31,924	67,546	73,420	35,874
Italy	54,005	13,053	48,029	45,310	10,566	44,088	47,922	12,552
South Africa	26,715	15,468	36,610	34,538	21,074	40,684	44,222	24,600
Spain	37,410	13,938	45,237	42,676	17,103	39,028	42,422	16,376
Brazil	35,899	25,794	33,847	31,931	25,752	35,743	38,851	26,215
Germany	40,928	11,291	44,177	41,676	13,593	33,846	36,789	12,989
Sweden	44,770	13,493	39,253	37,031	12,862	33,657	36,584	11,945
Poland	28,388	16,019	31,568	29,781	18,367	31,370	34,098	21,083
Slovenia	42,590	14,527	39,006	36,798	15,676	30,541	33,197	12,820
Denmark	76,063	18,529	50,570	47,708	12,351	28,861	31,371	7,467
Malaysia	25,753	12,846	25,985	24,514	12,992	28,392	30,861	14,301

Imports of parquet panels by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	828,425	357,574	851,050	802,877	396,504	807,240	877,435	434,805
Extra-EU	242,398	116,269	273,466	257,987	139,805	298,285	324,223	162,939
Developing countries	99,705	54,356	118,198	111,508	66,766	145,147	157,768	83,529
Leading suppliers:								
Sweden	211,397	76,403	173,732	163,898	66,100	123,274	133,994	52,438
Belgium	n.a.	n.a.	70,333	66,352	44,365	86,095	93,581	63,193
Germany	81,152	33,153	88,084	83,098	37,326	85,357	92,779	48,097
Norway	32,820	9,915	38,771	36,576	13,745	42,846	46,572	16,178
Austria	21,997	8,114	34,732	32,766	16,002	40,375	43,886	21,014
France	53,330	25,666	48,251	45,520	21,584	39,473	42,905	22,328
China	12,326	5,975	20,770	19,594	10,570	37,732	41,013	20,144
Denmark	53,370	20,089	53,061	50,058	20,125	37,418	40,672	15,859
Finland	52,585	17,126	48,229	45,499	16,500	36,538	39,715	14,582
Indonesia	25,436	11,653	24,412	23,030	13,390	36,264	39,417	17,620
Malaysia	28,430	15,904	33,135	31,259	18,363	35,867	38,986	20,899
Switzerland	31,631	7,575	33,439	31,546	8,811	29,065	31,592	8,010

EXPORTS

Exports of timber and timber products by EU member countries, by country of origin, 1998-2000
US$ thousand / € thousand / tonnes

	1998		1999			2000		
	value US$	volume	value US$	value €	volume	value US$	value €	volume
Total	17,414	39,185	17,608	16,611	40,581	17,069	18,554	45,334
Extra-EU	4,653	8,449	4,948	4,668	9,372	5,260	5,717	11,469
Leading destinations								
Germany	2,968	4,859	2,843	2,682	5,054	2,370	2,576	5,264
United Kingdom	1,815	3,939	1,778	1,678	3,881	1,698	1,846	3,715
Italy	1,490	5,029	1,546	1,458	5,350	1,515	1,646	5,935
The Netherlands	1,475	2,921	1,439	1,357	2,877	1,337	1,453	2,875
France	1,112	2,394	1,133	1,069	2,423	1,137	1,236	2,724
Spain	752	2,551	808	763	2,821	807	878	3,340
Japan	371	638	659	622	1,048	759	825	1,295
Belgium	n.a.	n.a.	682	644	2,042	638	694	2,560
Denmark	737	1,719	675	637	1,788	610	663	1,739
USA	397	262	453	427	369	587	638	602
Switzerland	612	779	605	571	745	549	597	702
Norway	538	1,772	479	452	1,555	482	523	1,722
China	162	204	306	289	505	474	515	1,159
Austria	591	1,885	581	548	1,915	469	510	1,948
Ireland	285	479	350	330	567	356	387	609
Sweden	295	1,264	282	266	1,148	280	304	1,258
Portugal	213	621	228	215	513	268	291	877
Hong Kong	269	314	301	284	430	206	224	383
Egypt	263	1,020	219	206	1,002	204	222	950

Production, imports, exports, and consumption of all timber in 1000 m^3

		Production			Imports			Exports			Consumption		
Country	**Product**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**
EU	Logs	224,201	243,469	227,714	47,964	56,706	54,205	13,936	17,805	17,559	258,230	282,370	264,359
	Sawn	75,221	79,628	77,045	40,201	42,926	41,136	31,531	32,479	33,489	83,891	90,075	84,693
	Veneer	1,455	1,578	1,519	874	860	1,050	484	495	505	1,845	1,943	2,064
	Plywood	3,219	3,313	3,271	4,802	5,186	4,839	2,532	2,590	2,479	5,488	5,909	5,631
France	Logs	33,237	39,120	34,500	2,085	2,084	2,085	2,972	6,009	6,009	32,350	35,196	30,576
	Sawn	10,236	12,283	11,100	3,045	3,369	3,338	1,105	1,391	1,380	12,175	14,261	13,058
	Veneer	149	153	150	91	101	122	62	77	72	179	177	200
	Plywood	546	561	554	332	348	387	243	225	258	634	683	683
Germany	Logs	35,063	46,504	36,500	2,869	3,256	2,900	4,552	4,968	5,000	33,380	44,792	34,400
	Sawn	16,110	16,722	16,500	5,514	5,811	5,390	2,385	2,493	3,920	19,239	20,040	17,970
	Veneer	284	284	300	177	208	220	113	124	130	348	368	390
	Plywood	364	340	325	1,021	965	980	160	235	90	1,225	1,070	1,215
Italy	Logs	4,213	3,649	3,865	4,952	5,805	5,805	15	24	24	9,150	9,430	9,646
	Sawn	1,630	1,590	1,600	7,605	8,380	7,500	212	208	210	9,023	9,762	8,890
	Veneer	450	525	490	175	199	180	22	28	27	603	696	643
	Plywood	450	465	425	367	422	380	139	146	135	678	741	670
Netherlands	Logs	882	879	900	424	384	450	262	220	250	1,043	1,043	1,100
	Sawn	362	389	450	3,598	3,705	3,750	427	383	375	3,533	3,711	3,825
	Veneer	19	19	20	24	34	30	15	14	12	28	39	38
	Plywood	3	3	3	558	568	575	52	50	50	509	520	528
U.K.	Logs	7,248	7,217	7,960	314	289	310	152	129	70	7,410	7,378	8,200
	Sawn	2,537	2,492	2,620	7,108	7,963	7,595	147	195	155	9,498	10,260	10,060
	Veneer	40	10	10	40	38	40	62	17	20	18	31	30
	Plywood	5	5	5	971	1,287	1,000	27	34	30	949	1,258	975

Source: ITTO, 2002

Production, imports, exports, and consumption of tropical timber in 1000 m^3

		Production			Imports			Exports			Consumption		
Country	**Product**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**	**1999**	**2000**	**2001**
EU	Logs	0	0	0	2,332	2,568	2,439	119	183	110	2,213	2,386	2,329
	Sawn	550	590	564	2,352	2,788	2,493	397	415	380	2,505	2,964	2,677
	Veneer	304	390	392	180	252	237	85	99	107	399	543	522
	Plywood	600	537	541	1,659	1,704	1,585	585	496	545	1,674	1,745	1,581
France	Logs	0	0	0	798	822	822	53	35	35	745	787	787
	Sawn	250	257	234	252	393	385	13	34	33	489	617	586
	Veneer	0	0	0	26	33	53	24	27	31	2	6	22
	Plywood	319	311	315	105	134	115	131	130	150	293	315	280
Germany	Logs	0	0	0	133	161	120	28	46	30	105	115	90
	Sawn	20	10	10	176	157	150	33	46	30	163	121	130
	Veneer	15	20	20	55	57	50	13	13	15	57	64	55
	Plywood	30	30	28	151	197	160	16	9	12	165	218	176
Italy	Logs	0	0	0	292	416	416	0	0	0	292	415	416
	Sawn	50	60	60	297	282	290	21	9	10	326	333	340
	Veneer	90	130	130	9	65	25	3	5	5	96	190	150
	Plywood	25	25	25	58	57	55	28	33	30	55	49	50
Netherlands	Logs	0	0	0	87	91	90	2	5	3	85	87	87
	Sawn	45	40	40	385	471	450	70	66	60	360	445	430
	Veneer	18	18	18	7	4	5	12	11	10	13	10	13
	Plywood	3	3	3	239	220	200	29	30	30	213	192	173
U.K.	Logs	0	0	0	24	65	10	0	49	0	24	17	10
	Sawn	10	8	5	210	328	300	0	5	5	220	331	300
	Veneer	0	0	0	4	11	10	0	6	5	4	5	5
	Plywood	0	0	0	652	655	575	0	7	0	652	647	575

Source: ITTO, 2002

APPENDIX 3 STANDARDS AND CERTIFICATION ORGANISATIONS

INTERNATIONAL

International Standardisation Institute (ISO)

Address:	P.O. Box 56, CH-1211 Geneva, Switzerland
Telephone:	+41 (0)22 7490111
Fax:	+41 (0)22 7333430
E-mail:	central@iso.ch
Internet:	www.iso.ch

Forest Stewardship Council

Address:	Avenida Hidalgo 502, 68000 Oaxaca, Oaxaca, Mexico
Telephone:	+52 (9) 51 46905/63244
Fax:	+52 (9) 51 62110
E-mail:	fscoax@fscoax.org
Internet:	www.fscoax.org

PEFC Council

Address:	2éme Etage, 17 Rue des Girondins, Merl-Hollerich, L-1626, Luxembourg
Telephone:	+352 26 25 90 59
Fax:	+352 26 25 92 58
E-mail:	pefc@pt.lu
Internet:	www.pefc.org

EUROPEAN UNION

Comité Européen de Normalisation (CEN)

European Normalisation Committee

Address:	Third countries Unit, Rue de Stassart 36, B-1050 Brussels, Belgium
Telephone:	+32 (0)2 5500811
Fax:	+32 (0)2 5500819
E-mail:	infodesk@cenorm.be
Internet:	www.cenorm.be

SGS European Quality Certification Institute E.E.S.V.

Address:	P.O. Box 200, 3200 AE Spijkenisse, The Netherlands
Telephone:	(31) 181-693750
Fax:	(31) 181-693582

FRANCE

Association Française de Normalisation (AFNOR)

Address:	Tour Europe, 92049 Paris La Défense Cedex, France
Telephone:	+33 (0)1 42915555
Fax:	+33 (0)1 42915656
Internet:	www.afnor.fr

Centre Technique du Bois et de l'Ameublement

Address:	10, Avenue de Saint Mandé, 75012 Paris, France
Telephone:	+33 (0)1 40 19 49 19
Fax:	+33 (0)1 43 40 85 65
E-mail:	courrier@ctba.fr
Internet:	www.ctba.fr

GERMANY

Deutsches Institut für Normung eV (DIN)

Address:	Burggrafenstrasse 4-10, , 10772 Berlin, Germany
Telephone:	+49 (0)30 26010
Fax:	+49 (0)30 26011231
E-mail:	postmaster@din.de
Internet:	www.din.de

RAL Deutsches Institut für Gütesicherung und Kennzeichnung e.V.

Address:	Siegburger Straße 39, 53757 Sankt Augustin, Germany
Telephone:	02241/1605-0
Fax:	02241/1605-11
E-mail:	RAL-Institut@t-online.de
Internet:	www.ral.de

ITALY

Ente Nazionale Italiano di Unificazione (UNI)

Address:	Via Battinotti Stassi 11A, 20100 Milan, Italy
Telephone:	+39 02 700241
Fax:	+39 02 70106106
E-mail:	uni@uni.com
Internet:	www.unicei.it

ICMQ

Institute of certification and quality marking for building products and services

Address:	Via Battistotti Sassi 11, 20133 Milan, Italy
Telephone:	+39 02 70105727
Fax:	+39 02 70106570

THE NETHERLANDS

Nederlands Normalisatie Instituut (NNI)

Address:	P.O.Box 5059, 2600 GB Delft, The Netherlands
Telephone:	+31 (0)15-2690390
Fax:	+31 (0)15-2690190
E-mail:	info@nni.nl
Internet:	www.nni.nl

Stichting Keuringsbureau Hout (SKH)
Address: P.O. Box 50, 1270 AB Huizen,
The Netherlands
Telephone: (035) 526 87 37
Fax: (035) 526 83 81
E-mail: mail@skh.org

Keurhout Foundation
Address: P.O. Box 369, NL 1380 AJ Weesp,
The Netherlands
Telephone: +31 (0)294 452430
Fax: +31 (0)294 450360
E-mail: keurhout@worldonline.nl
Internet: www.stichtingkeurhout.nl

Stichting Goed Hout!
Address: P.O. Box 118, 3970 AC Driebergen,
The Netherlands
Telephone: +31 (0)30-6926398
Fax: +31 (0)30-6922978
E-mail: info@goedhout.nl
Internet: www.goedhout.nl

UNITED KINGDOM
British Standards Institution (BSI)
Address: British Standards House, 389 Chiswick High
Road, London W4 4AL, United Kingdom
Telephone: +44 (0)208 996 90 00
Fax: +44 (0)208 996 74 00
E-mail: info@ bsi-global.com
Internet: www.bsi-global.com

BM TRADA Certification Limited
Address: Hughenden Valley, High Wycombe,
Buckinghamshire HP14 4NR. United Kingdom
Telephone: +44 (0)1494 569700
Fax: +44 (0)1494 565487
E-mail: enquiries@bmtrada.com
Internet: www.bmtrada.com

APPENDIX 4 SOURCES OF PRICE INFORMATION

International Tropical Timber Organization (ITTO)

Address:	International Organisations Center, 5th Floor, Pacifico Yokohama, 1-1-1, Minato Mirai, Nishi-Ku, Yokohama, 220 Japan
Telephone:	+81 45 2231110
Fax:	+81 45 2231111
E-mail:	Itto@mail.itto-unet.ocn.ne.jp
Internet:	www.itto.or.jp

GERMANY

Zentrale Markt- und Preisberichtstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH (ZMP)

Address:	Rochusstraße 2, 53123 Bonn, Germany
Telephone:	+49 (0)228 97770
Fax:	+49 (0)228 9777300
E-mail:	info@zmp.de
Internet:	www.zmp.de

APPENDIX 5 TRADE ASSOCIATIONS

EUROPEAN UNION
CEI-Bois (European Confederation of Woodworking Industries)
Address: Allèe Hof-ter-Vleest 5, Box 4,
1070 Bruxelles, Belgium
Telephone: +32 2 556 25 85
Fax: +32 2 556 25 95
E-mail: euro.wood.fed@skynet.be
Internet: www.cei-bois.org/

EuroWindoor
Telephone: +49 (0)69 955054-13
Fax: +49 (0)69 955054-11
E-mail: eurowindoor@window.de
Internet: www.window.de

European Panel Federation
Address: Allèe Hof-ter-Vleest 5, Box 5,
1070 Bruxelles, Belgium
Telephone: +32 2 556 25 89
Fax: +32 2 556 25 94
E-mail: euro.wood.fed@skynet.be
Internet: www.europanels.org

Association of European Producers of Laminate Flooring (EPLF)
Address: Mittelstr. 50 D-33602 Bielefeld, Germany
Telephone: +49 (0)521 1369760
Fax: +49 (0)521 9653377
E-mail: info@eplf.de
Internet: www.eplf.com

European Federation of the Parquet Industry
Address: Allée Hof-ter-Vleest 5, Box 4,
B-1070 Bruxelles, Belgium
Telephone: +32 (0)2 556.25.87
Fax: +32 (0)2 556.25.95
E-mail: euro.wood.fed@skynet.be

FRANCE
Le Commerce du Bois
Address: 6 avenue de Saint-Mandé, 75012 Paris, France
Telephone: 01 44 75 58 58
Fax: 01 44 75 54 00

Fédération Nationale du Bois (FNB)
Address: 1 place André Malraux 75001 Paris, France
Telephone: 00 33 1 42 6030 27
Fax: 00 33 1 42 60 5894
E-mail: info@fnbois.com
Internet: www.fnbois.com

GERMANY
Gesamtverband Holzhandel (BDHolz-VDH) e.V.
Address: Rostocker Str. 16, D-65191 Wiesbaden,
Germany
Telephone:
Fax:
E-mail: bdholz@bdholz.de
Internet: www.bdholz.de

An overview of German timber organisations can be found at the Internet
www.holz-zentralblatt.com/holz.nsf go to Internet Seiten - Nach Kategorie; then go to Inhalt: Holzlinks

ITALY
FEDECOMLEGNO
Federazione Nazionale dei Commercianti del Legno
Address: Via Toscana, 10 - 00187 Roma, Italy
Telephone: +39 06 4200681
Fax: +39 06 42012236
E-mail: fedecomlegno@confcommercio.it

THE NETHERLANDS
Nederlandse Vereniging van Houtagenten (NATA)
Address: P.O. Box 1383, 1300 BJ Almere,
The Netherlands
Telephone: +31 (0)36 5329821
Fax: +31 (0)36 5329571

Nederlandse Bond van Timmerfabrikanten (NBvT)
Address: P.O. Box 24, 1400 AA Bussum,
The Netherlands
Telephone: +31 (0)35 6947014
Fax: +31 (0)35 6944910

Vereniging van Nederlandse Houtondernemingen (VVNH)
Address: P.O. Box 1380, 1300 BJ Almere,
The Netherlands
Telephone: +31 (0)36 5321020
Fax: +31 (0)36 5321029
E-mail: vvnh@wxs.nl

SPAIN
At www.confemadera.es/confemadera/ you can find an overview of all associations linked to CONFEMADERA (Confederación Española de Empresarios de la Madera).

UNITED KINGDOM
British Woodworking Federation (BWF)
Address: 56-64 Leonard Street, London EC2A 4JX,
United Kingdom
Telephone: 0171 608 5050
Fax: 0171 608 5051
E-mail: bwf@bwf.org.uk
Internet: www.bwf.org.uk

Timber Trade Federation

Address:	Clareville House, 26/27 Oxendon St. London SW1Y 4EL, United Kingdom
Telephone:	+44 (0)20 7839 1891
Fax:	+44 (0)20 7930 0094
E-mail:	ttf@ttf.co.uk
Internet:	www.ttf.co.uk

APPENDIX 6 TRADE FAIR ORGANISERS

For more details on trade fairs, please refer to Section 1.6.1 of the EU Strategic Marketing Guide 'Timber and Timber Products'.

BELGIUM
Batibouw s.a.
(building fair)
Address: Chaussée de la Hulpe 217, 1170 Brussels, Belgium
Telephone: +32 (0)2 663 1400
Fax: +32 (0)2 660 4713
Internet: www.batibouw.com

FRANCE
Batimat
(building fair)
Address: 70 Rue Rivay, 92532 Levallois Perret Cedex, France
Telephone: +33 (0)1 4756 5102
Fax: +33 (0)1 4756 0818

GERMANY
Bautec
(timber, veneers, etc.)
Address: Messedamm 22, 14055 Berlin, Germany
Telephone: +49 (0)30 3038 2114
Fax: +49 (0)30 3038 2069
E-mail: bautec@messe-berlin.de
Internet: www.bautec.com

Interzum
(materials for timber products)
Address: Messeplatz 1, 50679 Köln, Germany
Telephone: +49 (0)2 218 210
Fax: +49 (0)2 218 212574
E-mail: bautec@messe-berlin.de
Internet: www.interzum.com

Gafa
(garden articles)
Address: Messeplatz 1, 50679 Köln, Germany
Telephone: +49 (0)2 218 210
Fax: +49 (0)2 218 212574
Internet:
http://www.koelnmesse.de/servlet/PB/menu/1012600/index.htm

Building Trade Fair
(building fair)
Address: Leipzigermesse , P.O. Box 720, 7010 Leipzig, Germany
Telephone: +49 (0)41 2230
Fax: +49 (0)41 2234575
Internet: www.baufach.de

BAU
(building fair)
Address: Leipzigermesse , P.O. Box 720, 7010 Leipzig, Germany
Telephone: +49 (0)89 51070
Fax: +49 (0)89 5107506
E-mail: info@bau.de
Internet: www.bau.de

SPAIN
Construmat
(construction materials)
Address: Avenida Reina Maria Christina s/n, 08004 Barcelona, Spain
Telephone: +34 (0)93 2332000
Fax: +34 (0)93 2332001
E-mail: construmat@firabcn.es
Internet: www.construmat.com

UNITED KINGDOM
Interbuild
(building and construction industry)
Address: 11 Manchester Square, London W1M 5AB, United Kingdom
Telephone: +44 (0)171 4861951
Fax: +44 (0)171 4868773
E-mail: info@interbuild.com
Internet: www.interbuild.com

DIY & Home Improvement Trade Show
(timber products)
Address: 27 Hastings Road, Bromley BR2 8NA, United Kingdom
Telephone: +44 (0)181 462 0721
Fax: +44 (0)181 462 0724

APPENDIX 7 TRADE PRESS

INTERNATIONAL

Tropical Forest Update (ITTO)

Address: Pacifico-Yokohama 1-1-1, Minato-Mirai, Nishiku, Yokohama, 220-0012, Japan

Telephone: +81 (0)45 2231110

Fax: +81 (0)45 2231111

E-mail: itto@itto.or.jp

Internet: www.itto.or.jp

FRANCE

Commerce Internationale du Bois (FFBTA)

Address: 6 Avenue de Saint-Mande, 75012 Paris, France

Telephone: +33 (0)1 4475 5858

Fax: +33 (0)1 4475 5400

E-mail: contact@boistropicaux.com

Internet: www.boistropicaux.com

GERMANY

Holz-Zentralblatt

DRW-Verlag Redaktion Holz-Zentralblatt

Address: Fasaneneweg 18, 70771 Leinfelden-Echterdingen, Germany

Telephone: +49 (0)711 7591 275

Fax: +49 (0)711 7591 267

E-mail: jkrauhausen@holz-zentralblatt.com

Internet: www.holz-zentralblatt.com

EUWID

Address: Bleichstrasse 20-22, 76593 Gernsbach, Germany

Telephone: +49 (0)7224 93970

Fax: +49 (0)7224 9397901

E-mail: info@euwid.de

Internet: www.euwid.de

THE NETHERLANDS

Houtwereld

Address: P.O. Box 122, 3100 AC Schiedam, The Netherlands

Telephone: +31 (0)10 427 4100

Fax: +31 (0)10 473 9911

E-mail: houtwereld@nijgh.nl

Internet: www.nijgh.nl/houtwereld

Het houtblad

Address: P.O. Box 1375, 1300 BJ Almere, The Netherlands

Telephone: +31 (0)36 532 7331

Fax: +31 (0)36 532 9708

E-mail: houtblad@centrum-hout.nl

Internet: www.houtblad.nl

UNITED KINGDOM

Timber Trade Journal (TTJ)

Miller Freeman UK Ltd.

Address: Sovereign Way, Tonbridge, Kent TN9 1RW, United Kingdom

Telephone: +44 (0)1732 364422

Fax: +44 (0)1732 361534

E-mail: info@edp.co.uk

Internet: www.edp.co.uk

APPENDIX 8 BUSINESS SUPPORT ORGANISATIONS

INTERNATIONAL
International Trade Centre UNCTAD/WTO (ITC)

Address:	Palais des Nations, P.O. Box 10, 1211 Geneva 10, Switzerland
Telephone:	(41) 22-7300111
Fax:	(41) 22-7334439
E-mail:	itcreg@intracen.org
Internet:	www.intracen.org

AUSTRIA
Austrian Federal Economic Chamber

Address:	P.O. Box 150, A-1045 Vienna, Austria
Telephone:	+43 (0)1 501050
Fax:	+43 (0)1 50105-150
E-mail:	aw-online@aw.wk.or.at
Internet:	www.wk.or.at/aw/aw_intl/index.htm

DENMARK
Danish Import Promotion Office for Products from Developing Countries (DIPO)

Address:	Danish Chamber of Commerce, Børsen, 1217 Copenhagen K, Denmark
Telephone:	+45 (0)33 950541
Fax:	+45 (0)33 120525
E-mail:	dipo@commerce.dk
Internet:	www.dipo.dk

GERMANY
BfAI, Federal Office of Foreign Trade Information

Address:	Agrippastrasse 87-93, P. O. Box 100522, 50455 Cologne, Germany
Telephone:	+49 (0)221 2057-0
Fax:	+49 (0)221 2057-212
E-mail:	bus.contacts@bfai.com
Internet:	www.bfai.com

ITALY
ICE
Italian National Institute for Foreign Trade

Address:	Via Liszt 21, 00144 Rome, Italy
Telephone:	+39 06 59921
Fax:	+39 0659926900
E-mail:	ice@ice.it
Internet:	www.ice.it

THE NETHERLANDS
CBI, Centre for the Promotion of Imports from developing countries

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	+31 (0)10 2013434
Fax:	+31 (0)10 4114081
E-mail:	cbi@cbi.nl
Internet:	www.cbi.nl

NORWAY
Norwegian Agency for Development Co-operation (Norad)

Address:	Tolbugaten 31, P.O. Box 8034 Deo, Oslo, Norway
Telephone:	+41 (0)22 242030
Fax:	+41 (0)22 242031
Internet:	www.norad.no

SWEDEN
Swedish International Development Co-operation Agency - Department for Infrastructure & Economic Co-operation (SIDA)

Address:	Sveavägen 20, S-105 25 Stockholm, Sweden
Telephone:	+46 (0)8 6985000
Fax:	+46 (0)8 6208864
E-mail:	sida@sida.org.se
Internet:	www.sida.se

SWITZERLAND
SIPPO, Swiss Import Promotion Programme

Address:	Stampfenbachstrasse 85, CH-8035 Zurich, Switzerland
Telephone:	+41 (0)1 365 5200
Fax:	+41 (0)1 365 5202
E-mail:	info@sippo.ch
Internet:	www.sippo.ch

APPENDIX 9 OTHER USEFUL ADDRESSES

INTERNATIONAL

ATIBT (Association Technique Internationale des Bois Tropicaux)

Address:	6, Avenue Saint-Mandé, 75012 Paris France
Telephone:	+33 (0)1 4342 4200
Fax:	+33 (0)1 4342 5522
E-mail:	sec@atibt.com
Internet:	www.atibt.com

Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES)

Address:	International Environment House, 15, chemin des Anémones, CH-1219 Châtelaine-Geneva, Switzerland.
Telephone:	+41 (0)22 917 8139/40
Fax:	+41 (0)22 797 3417
E-mail:	cites@unep.ch
Internet:	www.cites.org

FAO

Forestry Department, Publications and Information Coordinator

Address:	Ville delle Terme di Caracalla, 00100 Rome, Italy
Telephone:	+39 06 57054778
Fax:	+39 06 57052151
E-mail:	Forestry-www@fao.org
Internet:	www.fao.org/forestry/

International Chamber of Commerce

Address:	38, Cours Albert 1er, 75008 Paris, France
Telephone:	+33 (0)1 49 53 28 28
Fax:	+33 (0)1 49 53 29 42
E-mail:	icc@iccwbo.org
Internet:	www.iccwbo.org

UN/ECE Timber Section

Address:	Palais des Nations, CH-1211 Geneva, Switzerland
Telephone:	+41-22-9171172
Fax:	+41-22-9170041
E-mail:	info.timber@unece.org
Internet:	www.unece.org/trade/timber/welcome.htm

UNCTAD

(United Nations Conference on Trade and Development)

Address:	Palais des Nations, CH-1211 Geneva, Switzerland
Telephone:	+41 (0)22 90712 34
Fax:	+41 (0)22 9070043
E-mail:	ers@unctad.org
Internet:	www.unctad.org

EUROPE

Contact point EU ECO-label

Commission of the European Communities

Address:	DG XI-E4, Rue de la Loi 200, 1049 Brussels, Belgium
Telephone:	+32 (0)2 2990324
Fax:	+32 (0)2 2955684
Internet:	www.europa.eu.int/ecolabel

FRANCE

Service des Etudes et des Statistiques Industrielles (SESSI)

Address:	Bureau des Ventes, 20 avenue de Ségur, 75353 Paris, 07 SP, France
Telephone:	+33 (0)1 4319 4150
Fax:	+33 (0)1 4319 4173

GERMANY

GTZ Deutsche Gesellschaft für Technische Zusammenarbeit (GTZ) GmbH

(service enterprise for development cooperation)

Address:	Dag-Hammarskjöld-Weg 1-5, 65760 Eschborn, Germany
Telephone:	+49 (0)6196 79 0
Fax:	+49 (0)6196 79 1115
E-mail:	postmaster@gtz.de
Internet:	www.gtz.de

THE NETHERLANDS

CBI/Accesguide

(CBI's database on European non-tariff trade barriers

Address:	P.O. Box 30009, 3001 DA Rotterdam, The Netherlands
Telephone:	+31 (0)10 2013434
Fax:	+31 (0)10 4114081
Email:	accessguide@cbi.nl
Internet:	www.cbi.nl/accessguide

SKAL

(internationally operating inspecting and certifying organisation)

Address:	P.O. Box 384, 8000 AJ Zwolle, The Netherlands
Telephone:	+31 (0)38 4268181
Fax:	+31 (0)38 4213063
E-mail:	info@skal.com
Internet:	www.skal.com

UNITED KINGDOM

Forests Forever

Address:	Clareville House, 26/27 Oxendon Street, London SW1Y 4EL United Kingdom
Telephone:	+44 (0)20 7839 1891
Fax:	+44 (0)20 7930 0094
E-mail:	mbw@forestsforever.org.uk
Internet:	www.forestsforever.org.uk

APPENDIX 10 LIST OF DEVELOPING COUNTRIES

The list of developing countries as applied in this market survey, is the OECD DAC list of countries receiving Official Development Assistance (Part I). The list used is the one as at 1/1/2000.

Afghanistan
Albania
Algeria
Angola
Anguilla
Antigua and Barbuda
Argentina
Armenia
Azerbaijan
Bahrain
Bangladesh
Barbados
Belize
Benin
Bhutan
Bolivia
Bosnia & Herzegovina
Botswana
Brazil
Burkina Faso
Burundi
Cambodia
Cameroon
Cape Verde
Central African rep.
Chad
Chile
China
Colombia
Comoros
Congo, Dem. Rep
Congo, Rep.
Cook Islands
Costa Rica
Côte d'Ivoire
Croatia
Cuba
Djibouti
Dominica
Dominican republic
Ecuador
Egypt
El Salvador
Equatorial Guinea
Eritrea
Ethiopia
Fiji
Gabon
Gambia
Georgia
Ghana
Grenada
Guatemala
Guinea
Guinea-Bissau
Guyana
Haiti
Honduras
India
Indonesia
Iran
Iraq
Jamaica
Jordan
Kazakstan
Kenya
Kiribati
Korea, Rep. of
Kyrghyz Rep.
Laos
Lebanon
Lesotho
Liberia
Macedonia
Madagascar
Malawi
Malaysia
Maldives
Mali
Malta
Marshall Islands
Mauritania
Mauritius
Mayotte
Mexico
Micronesia, Fed. States
Moldova
Mongolia
Montserrat
Morocco
Mozambique
Myanmar
Namibia
Nauru
Nepal
Nicaragua
Niger
Nigeria
Niue
Oman
Pakistan
Palau Islands
Palestinian Admin. Areas
Panama
Papua New Guinea
Paraguay
Peru
Philippines
Rwanda
São Tomé & Principe
Saudi Arabia
Senegal
Seychelles
Sierra Leone
Slovenia
Solomon Islands
Somalia
South Africa
Sri Lanka
St. Helena
St. Kitts-Nevis
St. Lucia
St. Vincent and Grenadines
Sudan
Surinam
Swaziland
Syria
Tajikistan
Tanzania
Thailand
Timor
Togo
Tokelau
Tonga
Trinidad & Tobago
Tunisia
Turkey
Turkmenistan
Turks & Caicos Islands
Tuvalu
Uganda
Uruguay
Uzbekistan
Vanuatu
Venezuela
Vietnam
Wallis & Futuna
Western Samoa
Yemen
Yugoslavia, Fed. Rep.
Zambia
Zimbabwe

Note: Eurostat figures do not include figures for Cook Islands, Niue, St. Kitts-Nevis, Timor and Tokelau

APPENDIX 11 LIST OF NETHERLANDS IMPORTERS AND LEADING EU IMPORTERS

THE NETHERLANDS

Amsterdamse Fijnhouthandel
importer / sawn timber
Address: Minervahavensweg 14, 1013 AR Amsterdam, The Netherlands
Telephone: +31 (0)20 6828079
Fax: +31 (0)20 6843154
E-mail: afh@fijnhout.nl
Internet: www.fijnhout.nl/

BV Arnhemse Fijnhouthandel
importer / various species and sheet material
Address: Driepoortenweg 12, 6827 BR Arnhem, The Netherlands
Telephone: +31 (0)26 3648435
Fax: +31 (0)26 3630309
E-mail: af@af.nl
Internet: www.af.nl

BEKOL International BV
distributor & importer / various hardwood species and sheet
Address: Industriestraat 5e, 7122 AP Aalten, The Netherlands
Telephone: +31 (0)543 474260
Fax: +31 (0)543 476190
E-mail: info@aalten.bekol.nl
Internet: www.bekol.nl

A. van den Berg BV
manufacturer & importer / sawn timber in great variety of species
Address: P.O. Box 129, 2410 AC Nieuwerbrug a/d Rijn, The Netherlands
Telephone: +31 (0)348 684100
Fax: +31 (0)348 688142
E-mail: info@avandenberg.nl

Blees & Kluyvers Plaatmateriaal BV
wholesaler / sheet material
Address: P.O. Box 461, 1940 AL Beverwijk, The Netherlands
Telephone: +31 (0)251 218777
Fax: +31 (0)251 218683

Houthandel Lambert van de Bosch BV
sawn timber and sheet material
Address: P.O. Box 1082, 3900 BB Veenendaal, The Netherlands
Telephone: +31 (0)318 519047
Fax: +31 (0)318 529474

Bruynzeel Multipanel BV
importer of raw material for manufacturing of sheet material
Address: PO Box 19, 1500 EB Zaandam, The Netherlands
Telephone: +31 (0)75 6554200
Fax: +31 (0)75 6554290

Houthandel Boogaerdt BV
importer / sawn timber amd sheet material, doors and windows
Address: PO Box 2009, 2931 AA Krimpen a/d Lek, The Netherlands
Telephone: +31 (0)180 551552
Fax: +31 (0)180 510776
E-mail: info@boogaerdt.nl
Internet: www.boogaerdt.nl/

Houthandel de Carpentier BV
importer / sawn timber and sheet material
Address: PO Box 95, 1430 AB Aalsmeer, The Netherlands
Telephone: +31 0297 322000
Fax: +31 0297 326958
E-mail: info@carpentier.nl
Internet: www.carpentier.nl

Dekker Hout Den Haag BV
manufacturer & importer / great variety of timber and timber products
Address: PO Box 43080 Den Haag, The Netherlands
Telephone: +31 (0)70 3082424
Fax: +31 (0)70 3082479
E-mail: dekwood@dekkerhout.nl
Internet: www.dekkerhout.nl

Covatuin
buying organisation for 48 garden centres
Address: PO Box 422, 3440 AK Woerden, The Netherlands
Telephone: +31 (0)348 439500
Fax: +31 (0)348 439509

Houtgroep van Drimmelen
importer / sawn timber and sheet material
Address: PO Box 39, 3330 AA Zwijndrecht
Telephone: +31 (0)78 6107207
Fax: +31 (0)78 610151
E-mail: info@drim.nl
Internet: www.vandrimmelen.nl

DPW Te Paske BV
wholesaler / sawn timber in various species
Address: P.O. Box 40, 7120 AA Aalten, The Netherlands
Telephone: +31 (0)543 472066
Fax: +31 (0)543 474569
E-mail: info@dpw-te-paske.nl

PontEecen Nederland BV
importer / wide range of timber and timber products
Address: P.O. Box 4, 1724 ZG Oudkarspel, The Netherlands
Telephone: +31 (0)226 319700
Fax: +31 (0)226 319766
E-mail: info@eecen.nl
Internet: www.eecen-prefab.nl

Fetim BV
wholesaler / wide range of timber and timber products
Address: Kopraweg 1, 1047 BP Amsterdam, The Netherlands
Telephone: +31 (0)20 5805333
Fax: +31 (0)20 5805361
Internet: www.fetim.com/

Fikszo BV
distributor / wide range of DIY products
Address: P.O. Box 2515, 2940 AA Lekkerkerk, The Netherlands
Telephone: +31 (0)180 666444
Fax: +31 (0)180 666459
E-mail: homedesign@fikszo.com
Internet: www.fikszo.com

Goodwood BV
wholesaler / sawn and sheet material
Address: P.O. Box 136, 1930 AC Egmond aan Zee, The Netherlands
Telephone: +31 (0)72 5065443
Fax: +31 (0)72 5061300
E-mail: info@goodwood.nl
Internet: www.goodwood.nl/

De Groot's Houthandel BV
manufacturer & wholesaler / sawn timber and sheet material
Address: P.O. Box 31, 7680 AA Vroomshoop, The Netherlands
Telephone: +31 (0)546 641845
Fax: +31 (0)546 643835

Groot Lemmer BV
manufacturer & importer / timber for heavy constructions
Address: P.O. Box 1, 8531 PA Lemmer, The Netherlands
Telephone: +31 (0)514 561441
Fax: +31 (0)514 565245

Habraken Houtimport
importer / mainly sawn timber
Address: P.O. Box 19, 5550 AA Valkenswaard, The Netherlands
Telephone: +31 (0)495 431700
Fax: +31 (0)495 431710
E-mail: habraken.hout@planet.nl
Internet: www.habrakenhout.nl/

Homburg Houtimport BV
importer / sawn timber and sheet material
Address: Ambacht 24 1511JZ Oostzaan, The Netherlands
Telephone: +31 (0)75 6841412
Fax: +31 (0)75 6844997

Houtbedrijf van Hout BV
manufacturer & importer / logs specially for slicing
Address: P.O. Box 5, 5450 AA Mill, The Netherlands
Telephone: +31 (0)485 460600
Fax: +31 (0)485 452080

Houthandel Houtex BV
wholesaler / sawn timber and sheet material
Address: P.O. Box 18, 2740 AA Waddinxveen, The Netherlands
Telephone: +31 (0)182 615933
Fax: +31 (0)182 610105
E-mail: jpoot@houtex.nl
Internet: www.houtex.nl

Houtgroep Nederland
distributor / sawn timber and sheet material
Address: P.O. Box 158, 9700 AD Groningen, The Netherlands
Telephone: +31 (0)50 3135105
Fax: +31 (0)50 3184390
E-mail: info@ kunstoberman.nl
Internet: www.kunstoberman.nl

Houtplex BV
wholesaler / hardwood and sheet material
Address: Industriestraat 40, 4782 EZ Haaksbergen, The Netherlands
Telephone: +31 (0)53 5724105
Fax: +31 (0)53 5726875

Houtimport Hubert Jans & Co.
importer / sawn timber
Address: P.O. Box 54, 8860 AB Harlingen, The Netherlands
Telephone: +31 (0)517 413641
Fax: +31 (0)517 412405
Internet: www.hubert-jans.nl/

Hupkes Houthandel Dieren BV
manufacturer / various hardwood species
Address: P.O. Box 21, 6950 AA Dieren, The Netherlands
Telephone: +31 (0)313 419100
Fax: +31 (0)313 420039

Iboma Lopik BV
importer & distributor / wide range of timber and timber products
Address: Ambachtsweg 6, 3411 MJ Lopik, The Netherlands
Telephone: +31 (0)348 554100
Fax: +31 (0)348 554200

Intradur Dwarsligger- en Hardhouthandel
wholesaler / hardwood
Address: P.O. Box 460, Zaandam, The Netherlands
Telephone: +31 (0)75 6554000
Fax: +31 (0)75 6702226

Jongevos Houthandel BV
wholesaler / sawn timber and sheet material
Address: Zeeburgerpad 23-24-25, 1018 AH Amsterdam, The Netherlands
Telephone: +31 (0)20 6650416
Fax: +31 (0)20 6683851

H. Lamaker's Fijnhouthandel BV
importer / sawn timber and sheet material
Address: P.O. Box 191, 4130 ED Vianen, The Netherlands
Telephone: +31 (0)347 374844
Fax: +31 (0)347 377908

Mentrop Hout & Plaat Eindhoven BV
wholesaler / sawn timber and sheet material
Address: P.O. Box 1298, 5602 JA Eindhoven, The Netherlands
Telephone: +31 (0)40 2431805
Fax: +31 (0)40 2438806
E-mail: mentrop@wxs.nl

Polman Fijnhout
importer / wide range of species
Address: P.O. Box 1371, 7500 BJ Enschede, The Netherlands
Telephone: +31 (0)53 4323333
Fax: +31 (0)53 4323344
E-mail: fijnhout@polman.nl

PontCentrop Houtimport BV
importer / wide range of species and sheet material
Address: P.O. Box 2149, 1500 GC Zaandam, The Netherlands
Telephone: +31 (0)75 6819999
Fax: +31 (0)75 6124810

J. Raaijmakers Houtimport BV
importer
Address: Loevestraat 10, 5961 TX Horst, The Netherlands
Telephone: +31 (0)77 3986539
Fax: +31 (0)77 3984465
E-mail: raaijmakerbv@c.s.com

Wed. J. Reef BV
manufacturer & importer / specialist in timber for waterworks
Address: Breukersweg 9, 7471 St. Goor, The Netherlands
Telephone: +31 (0)547 272672
Fax: +31 (0)547 276335

RET-DHZ
importer & distributor / wide range of species and sheet material
Address: P.O. Box 529, 3500 AM Utrecht, The Netherlands
Telephone: +31 (0)30 2455555
Fax: +31 (0)30 2443394
E-mail: info@ret.com
Internet : www.ret.com

Jan Smulders Triplex Import BV
sheet material
Address: P.O. Box 140, 5600 AC Eindhoven, The Netherlands
Telephone: +31 (0)40 2435224
Fax: +31 (0)40 2439354

Houthandel J. Sneek en Zoon BV
importer / sawn timber
Address: P.O. Box 52, 1120 AB Landsmeer, The Netherlands
Telephone: +31 (0)20 4823952
Fax: +31 (0)20 4824054

Sneek Hardhout Import BV
importer / hardwood
Address: P.O. Box 49, 4645 BH Putte, The Netherlands
Telephone: +31 (0)164 602572
Fax: +31 (0)164 602700

Houthandel van de Stadt BV
importer / sawn timber and mouldings
Address: P.O. Box 35, 1500 EA Zaandam, The Netherlands
Telephone: +31 (0)75 6554000
Fax: +31 (0)75 6702226
E-mail: www.vandestadt.nl
Internet: info@vandestadt.nl

STIHO Utrecht BV
distributor / sawn timber and sheet material
Address: P.O. Box 40210, 3504 AA Utrecht, The Netherlands
Telephone: +31 (0)30 2424424
Fax: +31 (0)30 2424484
E-mail: info@stiho.nl
Internet: www.stiho.nl

Abraham van Stolk & Zoonen
importer / wide range of timber, timber products and sheet material
Address: P.O. Box 1100, 3000 BC Rotterdam, The Netherlands
Telephone: +31 (0)10 4377400
Fax: +31 (0)10 4377243

Stora Timber Doe Het Zelf Producten BV
distributor / sawn timber and mouldings
Address: Archangelkade 8, 1013 BE Amsterdam, The Netherlands
Telephone: +31 (0)20 6807700
Fax: +31 (0)20 680 77 90
Internet: www.storaenso.com

van Swaay Schijndel BV
manufacturer / sawn timber and mouldings
Address: P.O. Box 1, 5480 AA Schijndel, The Netherlands
Telephone: +31 (0)413 312727
Fax: +31 (0)413 367870
E-mail: swaay@wxs.nl

Talens Houtindustrie
manufacturer / sawn timber and mouldings
Address: P.O. Box 7, 7950 AA Staphorst, The Netherlands
Telephone: +31 (0)522 466000
Fax: +31 (0)522 466060

Vandenberg Houtindustrie en Handelsmij BV
wholesaler
Address: P.O. Box 244, 7940 AE Meppel, The Netherlands
Telephone: +31 (0)522 252925
Fax: +31 (0)522 260254

Houtwarenfabriek v/h J. Willemstein BV
importer & distributor / wide range of timber products for DIY trade
Address: P.O. Box 114, 4200 AC Gorinchem,
Telephone: +31 (0)183 691234
Fax: +31 (0)183 634916

Wijma Kampen BV
importer & manfacturer / specialist in waterwork constructions
Address: P.O. Box 241, 8260 AS Kampen, The Netherlands
Telephone: +31 (0)38 3372933
Fax: +31 (0)38 3322040
E-mail: wijma@wijma.com

DOORS

Van Bruchem Deurenfabriek BV
importer & manfacturer
Address: P.O. Box 11, 5300 AA Zaltbommel, The Netherlands
Telephone: +31 (0)418 513134
Fax: +31 (0)418 514580
E-mail: info@bruchem.nl
Internet: www.bruchem.nl

Douma Deuren BV
importer & manfacturer
Address: P.O. Box, 8100 AA Raalte, The Netherlands
Telephone: +31 (0)572 358222
Fax: +31 (0)572 357912

Dehagro Deuren BV
importer & manfacturer
Address: P.O. Box 19, 6690 AB Gendt, The Netherlands
Telephone: +31 (0)481 424121
Fax: +31 (0)481 423477
E-mail: dehagro@worldaccess.nl

Deurenfabriek van der Plas BV
importer & manfacturer
Address: P.O. Box 71, 3371 XC Hardinxveld-Giessendam, The Netherlands
Telephone: +31 (0)184 614888
Fax: +31 (0)184 617236

Van Putten Deuren en Vloeren
importer & manfacturer
Address: Strijkviertel 46, 3454 PN De Meern, The Netherlands
Telephone: +31 (0)30 6664569
Fax: +31 (0)30 6665559

Homex Deuren BV
manfacturer
Address: P.O. Box 9, 7680 AA Vroomshoop, The Netherlands
Telephone: +31 (0)546 643535
Fax: +31 (0)546 641628
E-mail: info@homex.nl
Internet: www.homex.nl

Houtindustrie Norhtgo BV
Address: P.O. Box 3004, 2222 CA Katwijk, The Netherlands
Telephone: +31 (0)71 4029322
Fax: +31 (0)71 4030081

Kegro Deuren
importer & manfacturer
Address: P.O. Box 94, 6550 AB Groesbeek, The Netherlands
Telephone: +31 (0)24 3971144
Fax: +31 (0)24 3975354
E-mail: info@kegro.nl
Internet: www.kegro.nl/

Koker Interieur
importer
Address: P.O. Box 2115, 3500 GC Utrecht, The Netherlands
Telephone: +31 (0)30 2626120
Fax: +31 (0)30 2616049

van Kuyk Deuren BV
manufacturer
Address: Ringbaan Oost 114, 5013 CD Tilburg, The Netherlands
Telephone: +31 (0)13 5433020
Fax: +31 (0)13 5431782

Java Deurenfabriek BV
importer & manfacturer
Address: P.O. Box 44, 1950 AA Velsen-Noord, The Netherlands
Telephone: +31 (0)251 229117
Fax: +31 (0)251 212612
Internet: www.java.nl

Steffex BV
importer
Address: P.O. Box 360, 7200 AJ Zutphen, The Netherlands
Telephone: +31 (0)575 584444
Fax: +31 (0)575 515318
Internet: www.candoor.nl

Svedex BV
importer & manfacturer
Address: Svedexweg 21, 7051 DN Varsseveld, The Netherlands
Telephone: +31 (0)315 259911
Fax: +31 (0)315 259275
E-mail: svedex@euronet.nl

van Vuuren Deuren
importer & manfacturer
Address: P.O. Box 90, 9000 AB Grouw, The Netherlands
Telephone: +31 (0)566 623737
Fax: +31 (0)566 624331
Internet: www.vanvuuren.nl/

PARQUET

Bruynzeel Vloeren
importer & manfacturer
Address: P.O. Box 1193, 4700 BD Roosendaal, The Netherlands
Telephone: +31 (0)165 583000
Fax: +31 (0)165 561620
Internet: www.bruynzeel-vloeren.nl

Eemland Parket
importer & manfacturer
Address: Nijverheidsweg 55, 3812 PK Amersfoort, The Netherlands
Telephone: +31 (0)33 4612991
Fax: +31 (0)33 4651302
Internet: www.eemlandparket.nl

Doetinchem Parket
importer & manfacturer
Address: P.O. Box 23, 7000 AA Doetinchem, The Netherlands
Telephone: +31 (0)314 324200
Fax: +31 (0)314 340158
Internet: www.parketnet.com

Swedesign
importer & manfacturer
Address: Davelaak 17, 3830 AC Leusden, The Netherlands
Telephone: +31 (0)33 4945757
Fax: +31 (0)33 495044
E-mail: swedesign@wxs.nl

FRANCE

Bois des Trois Ports
importer / sawn timber, logs and plywood
Address: 13 Rue Houmaille, 44340 Bougenais, France
Telephone: +33 (0)2 4065 2753
Fax: +33 (0)2 4032 0777

Bois Import
importer / sawn timber and veneers
Address: Rue des Scieries, 59640 Dunkerque, France
Telephone: +33 (0)3 2824 0102
Fax: +33 (0)3 2824 0444
E-mail: bois-import@wanadoo.fr

Fribois
importer & manfacturer / sawn timber and flooring
Address: BP 14-2 Rue Foch, 59118 Wambrechies, France
Telephone: +33 (0)3 2078 8592
Fax: +33 (0)3 2039 6900
E-mail: fribois@free.fr

Guillemette
importer / sawn timber and plywood
Address: P.O. Box 525, 76028 Le Havre Cédex, France
Telephone: +33 (0)2 3519 2360
Fax: +33 (0)2 3541 3291

Indubois
importer / sawn timber, veneers and logs
Address: Zac de l'Ancien Pont-La Peyrade, 34110 Frontignan, France
Telephone: +33 (0)4 6746 8500
Fax: +33 (0)4 6780 2698
Email: indubois@onet.fr

Lapeyre Menuiserie
distributor / doors, floorings, joinery and mouldings
Address: 2 rue André Karman, 93300 Aubervilliers, France
Telephone: +33 (0)1 4811 7400
Fax: +33 (0)1 4811 7401
Internet: www.lapeyre.fr

Sciages et Grumes
importer / sawn timber, logs and plywood
Address: 39 Bld Paris, 62190 Lilliers, France
Telephone: +33 (0)3 2154 6100
Fax: +33 (0)3 2126 7868
Internet: www.sciagesetgrumes.com

Sinbpla
importer & wholesaler / sawn timber
Address: ZI de Cheviré, 44340 Bouguenais, France
Telephone: +33 (0)2 4032 2222
Fax: +33 (0)2 4032 0775
Internet: www.sinbpla.fr

Sté Forestiere du Maine
importer / sawn timber and logs
Address: 14 rue de l'Arche 72000 Le Mans, France
Telephone: +33 (0)2 4372 0700
Fax: +33 (0)2 4384 7284

Ets. Thanry
importer / sawn timber and logs
Address: 43 Rue Sebastien Bottin, P.O. Box 1, 54115 Favieres, France
Telephone: +33 (0)3 8315 2840
Fax: +33 (0)3 8315 2845

Robert Pierre & Cie
importer / African logs
Address: Route de Tranzault, 36120 Ardentes, France
Telephone: +33 (0)2 5408 1280
Fax: +33 (0)2 5436 3833
E-mail: ra-robert@wanadoo.fr

Rougier Panneaux (BPR)
importer / veneers and plywood
Address: 9 Impasse des Petits Marais, Bassin no. 5, 92230 Gennevilliers, France
Telephone: +33 (0)1 4798 2626
Fax: +33 (0)1 4798 5403

Rougier Sylvaco
distributor & importer / sawn timber and logs
Address: 155 Av. de la Rochelle, P.O. Box 8826, 79028 Niort Cedex 09, France
Telephone: +33 (0)5 4977 2030
Fax: +31 (0)5 4977 2040
E-mail: info@rougier.fr
Internet: www.rougier.fr

Sète Inter
importer / sawn timber, logs and flooring
Address: 3 Place Delille, P.O. Box 125, 34202 Sete Cedex, France
Telephone: +33 (0)4 6746 6610
Fax: +33 (0)4 6746 6619

Tropical Timber
importer / sawn timber and logs
Address: 68 Bld. Emile Delmas, P.O. Box 2061, 17000 La Rochelle, France
Telephone: +33 (0)5 4642 6348
Fax: +33 (0)5 4643 8690

GERMANY

Ahmerkamp, Karl Vechta
importer & manufacturer / sawn timber, flooring and plywood
Address: Oldenburger Strasse 109, D-49377 Vechta, Germany
Telephone: +49 (0)4441-950-0
Fax: +49 (0)4441-950122
E-mail: info@holz-ahmerkamp.de
Internet: www.holzland.de/ahmerkar

W. Brügmann & Sohn
importer / sawn timber
Address: Kanalstrasse 80, 44147 Dortmund, Germany
Telephone: +49 (0)231 9986116
Fax: +49 (0)231 9986258
E-mail: import-WBS@bruegmann.de
Internet: www.bruegmann.de

Dreyer & Hillmann GmbH
importer & manufacturer / sawn timber
Address: Beim Industriehafen 57, 28237 Bremen, Germany
Telephone: +49 (0)421 643070
Fax: +49 (0)421 640899
E-mail: hillmann@deha-holz.de
Internet: www.deha-holz.de

J. Henr. Drunert & Co.
importer & manufacturer / sawn timber and plywood
Address: P.O. Box 106145, 28061 Bremen, Germany
Telephone: +49 (0)421 386960
Fax: +49 (0)421 3869666
E-mail: contact@druenert.de
Internet: www.druenert.de

Hansen & Detlefsen GmbH.
importer & manufacturer / sawn timber
Address: Grüner Weg 10, 25746 Heide, Germany
Telephone: +49 (0)481 68888
Fax: +49 (0)481 688899
E-mail: hol-con-hamburg@t-online.de

Heinrich Kruger & Sohn
importer & manufacturer / sawn timber and panels
Address: An der Kleimanbrücke 52, 48157 Munster, Germany
Telephone: +49 (0)251 93280
Fax: +49 (0)251 932 8110

Heinrich Freudenberg GmbH & Co. KG
importer & manufacturer / sawn timber, panels, doors, veneers
Address: Rote Brucke 6-15, 22113 Hamburg, Germany
Telephone: +49 (0)40 714877-0
Fax: +49 (0)40 714877-66
E-mail: wob@importholz.de
Internet: www.importholz.de

Holzwerk Haussermann GmbH & Co. KG
importer & manufacturer / sawn timber, mouldings and panels
Address: Ittenberger Strasse 23, 71560 Sulzbach/Murr, Germany
Telephone: +49 (0)7193 540
Fax: +49 (0)7193 5449
E-mail: info@haeussermann.de
Internet: www.haeussermann.de

HolzLand Friedrich Klatt GmbH
importer & manufacturer / sawn timber and construction material
Address: Brolingstrasse 53, 23554 Lübeck, Germany
Telephone: +49 (0)451 470070
Fax: +49 (0)451 4700710
E-mail: info@klatt.de
Internet: www.klatt.de

Landre & Bartels GmbH & Co. KG
importer / sawn timber
Address: P.O. Box 100612, 32508 Bad Oeyenhausen, Germany
Telephone: +49 (0)5731 306670
Fax: +49 (0)5731 3066710
E-mail: info@landre-bartels.de
Internet: www.landre-bartels.de

Carl Götz GmbH
importer & manufacturer / panels, doors, veneers and sawn timber
Address: Lessingstrasse 1, 89231 Neu-Ulm, Germany
Telephone: +49 (0)731 70480
Fax: +49 (0)731 7048777
E-mail: info@carlgoetz.de
Internet: www.carlgoetz.de

Merten Woodproducts
importer / sawn timber, parquet and veneers
Address: P.O. Box 103364, 28033 Bremen, Germany
Telephone: +49 (0)421 320202
Fax: +49 (0)421 320206
E-mail: mw@mertenwood.de
Internet: www.mertenwood.de

K. Heinz Mohring
importer / veneers
Address: P.O. Box 1210, 71113 Gartringen, Germany
Telephone: +49 (0)7034 22015
Fax: +49 (0)7034 22017

MPS & Müller, Szymczak & Co. GmbH
importer / sawn timber and plywood
Address: Liebigstrasse 64, 22113 Hamburg, Germany
Telephone: +49 (0)49 7333001
Fax: +49 (0)49 73330277
E-mail: muellerszymczak@holz-import.de
Internet: www.holzimport.de

Theodor Nagel
importer / sawn timber and logs
Address: Billstrasse 118, 20539 Hamburg, Germany
Telephone: +49 (0)40 7811 00-0
Fax: +49 (0)40 7811 0024
E-mail: info@theodor-nagel.com
Internet: www.theodor-nagel.com

Alfred Neumann
importer / roundlogs and lumber
Address: Wilmanstrasse 26, 21107 Hamburg, Germany
Telephone: +49 (0)40 751 0040
Fax: +49 (0)40 751 00411

John Peemöller GmbH Holzimport
importer / sawn timber and logs
Address: P.O. Box 930808, 21107 Hamburg, Germany
Telephone: +49 (0)40 751535
Fax: +49 (0)40 7522516
E-mail: info@johnpeemoeller.de
Internet: www.johnpeemoeller.de

Pinus Holzimport
importer & manufacturer / lumber and mouldings
Address: Südliche Uferstrasse 3, 76189 Karlsruhe, Germany
Telephone: +49 (0)721 95950
Fax: +49 (0)721 9595100
E-mail: info@pinus.de
Internet: www.pinus.de

Peter Josef Ruland & Co.
importer / sawn timber and logs
Address: Tich 1, 48361 Beelen, Germany
Telephone: +49 (0)2586 93090
Fax: +49 (0)2586 930993
E-mail: ruland-timber@t-online.de
Internet: www.ruland-timber.com

Schweyer Lumber Import
importer / sawn timber and laminates
Address: Fruchtbahnhofstrasse 3, 68159 Mannheim, Germany
Telephone: +49 (0)621 1593010
Fax: +49 (0)621 1593149
E-mail: schweyerkc@karlscheyerag.ma.eunet.de

Robert Thies & Co.
importer & manufacturer / sawn timber, panels and flooring
Address: P.O. Box 211160, 50535 Köln, Germany
Telephone: +49 (0)2203 4580
Fax: +49 (0)2203 458200
E-mail: euroholz@thies.de
Internet: www.thies.de

ITALY
International Timber Agency & Trade (ITAT)
importer / timber brokers & agents
Address: 64 v. Jannelli 80131 Napoli, Italy
Telephone: +39 0815 794 212
Fax: +39 0815 790 788

COMOTTI E. SPA
importer & manufacturer / timber for building & packing
Address: 43, v. Galileo Galilei 20091 Bresso (MI) Italy
Telephone: +39 026 100 831
Fax: +39 0266 502 260
E-mail: comole@tin.it

Marin Giorgio SPA
importer / lumber merchants
Address: 15, v. Spada - Fanzolo 31050 Vedelago (TV), Italy
Telephone: +39 0423 487 044
Fax: +39 0423 476 11
E-mail: wood@maringiorgio.it
Internet: www.maringiorgio.it/

Legno Stile S.r.l.
Address: Via Eugenio Montale, 7
31010 Ponte della Priula (TV), Italy
Telephone: +39 0438 758088
Fax: +39 0438 758759
E-mail: info@legnostile.com
Internet: www.legnostile.com

FMR Trading S.r.l.
Address: Via Mazzini 7/A, Galleria Metauro, 61033 Fermignano (PS), Italy
Telephone: +39 0722 332427
Fax: +39 0722 332428
E-mail: fmr@fmr.it
Internet: www.fmr.it

F.lli Fiasella s.r.l.
importer & manufacturer
Address: Via Antica Luni, 18 54011 Aulla (MS), Italy
Telephone: +39 0187/420432
Fax: +39 0187/421014
E-mail: fiasella@libero.it
Internet: www.fiasella.it

UNITED KINGDOM

Atkins & Cripps Ltd.
importer & manufacturer / sawn timber
Address: 95 London Road, Bishops Stortford Bilston, CM23 3DU, United Kingdom
Telephone: +44 (0)1279 652121
Fax: +31 (0)1279 657890
Internet: www.atkinsandcripps.co.uk

Brooks Bros
sawn hardwood
Address: The Causeway Heybridge, Maldon, Essex CM9 7LJ, United Kingdom
Telephone: +44 (0)1621 850166
Fax: +44 (0)1621 859054

Chindwell Co Ltd.
importer & manufacturer / wood-based panels
Address: Hyde House, The Hyde, London NW9 6JT, United Kingdom
Telephone: +44 (0)20 8205 6171
Fax: +44 (0)20 8205 8800

Clarks Wood Co. Ltd.
importer & manufacturer / hardwood, floorings and panels
Address: Silverthorne Lane, Bristol BS2 0QJ, United Kingdom
Telephone: +44 (0)117 9716316
Fax: +44 (0)117 9723119
E-mail: info@clarkswood.com
Internet: www.clarkswood.com

Glenmere Timber Co. Ltd
sawn hardwood
Address: Gores Lane, Market Hardborough, Leicestershire LE16 8AJ, United Kingdom
Telephone: +44 (0)1858 466390
Fax: +44 (0)1858 433733

Y Goldberg & Sons Ltd.
importer & manufacturer / sawn timber and flooring
Address: 3-5 Waterloo Road, Uxbridge, Middlesex UB8 2QX, United Kingdom
Telephone: +44 (0)1895 253491
Fax: +44 (0)1895 239696
E-mail: info@goldberg.uk.com

International Timber
importer & manufacturer / sawn timber and panels
Address: Haven Road, The Hythe, Colchester, Essex CO2 8HU, United Kingdom
Telephone: +44 (0)1206 866822
Fax: +44 (0)1206 878000
E-mail: info@internationaltimber.co.uk
Internet: www.forestsoftware.co.uk/internationaltimber

F.W. Mason & Sons
importer / sawn timber
Address: Colwick Industrial Estate, Nottingham NG4 2EQ, United Kingdom
Telephone: +44 (0)115 9113500
Fax: +44 (0)115 9113555
E-mail: mail@masons-timber.co.uk
Internet: www.masons-timber.co.uk

Montague L. Meyer Ltd.
agent / sawn timber
Address: P.O. Box 3, Rippleway Wharf, River Road, Barking, Essex, IG11 0DU, United Kingdom
Telephone: +44 (0)208 477 8000
Fax: +44 (0)208 594 8255
E-mail: sales.birmingham@mlmuk.com

Morgan & Co.
agent / sawn timber
Address: Knight Road, Rochester, Kent ME2 2BA, United Kingdom
Telephone: +44 (0)1634 290909
Fax: +44 (0)1634 290800
E-mail: info@morgantimber.co.uk
Internet: www.morgantimber.co.uk

NHG Timber Ltd.
importer / sawn timber and logs
Address: 4 Eagle House, Cranleigh Close, Sanderstead South Croydon, CR2 9LH, United Kingdom
Telephone: +44 (0)20 86514030
Fax: +44 (0)20 86510913
E-mail: timber@nhg.cix.co.uk

Timbmet Ltd.
importer & manufacturer / sawn timber

Address:	P.O. Box 39, Chawley Works, Cumnor Hill, Oxford OX2 9PP, United Kingdom
Telephone:	+44 (0)1865 862233
Fax:	+44 (0)1865 864367
E-mail:	sales.timbmet@virginnet.co.uk
Internet:	www.timbmet.com

Willamette Europe
distributor / panels

Address:	Maitland House, Warrior Square, Southend-on-Sea, Essex SS1 2JY, United Kingdom
Telephone:	+44 (0)1702 619044
Fax:	+44 (0)1702 617162
E-mail:	sales@willamette-europe.com
Internet:	www.willamette-europe.com

Wickes Buildings Supplies
distributor / timber products

Address:	120/138 Station Road, Harrow, Middlesex HA1 2QB, United Kingdom
Telephone:	+44 (0)20 8901 2000
Fax:	+44 (0)20 8863 7194
Internet:	www.wickes.co.uk

APPENDIX 12 USEFUL INTERNET SITES

www.unece.org/trade/timber/mis/mis.htm
This site contains all market related reports and statistics of the Timber Committee. One of the main functions of the Committee is to follow and report on timber markets in the ECE region of Europe, North America and the Commonwealth of Independent States.

www.fao.org/forestry/FO/DATABASE/dbase-e.stm
On-line FAO Forestry databases (statistical, textual and graphical).

www.fao.org/forestry/fop/foph/foph-e.stm
Forest Harvesting, Trade and Marketing Branch

www.intracen.org/mds/sectors/wood/welcome.htm
ITC site on wood and wood products (in preparation).

www.panda.org/forestandtrade/about_the_network/atn_network_list.html
This site provides information on companies and businesses that are part of the Global Forest and Trade Network.

www.sfcw.org
Sustainable Forestry & Certification Watch provides information and analysis on forest certification and closely related developments, such as the forest products purchasing policies of major corporate buyers. It publishes the international newsletter Forest Certification Watch, which reports on and analyzes the most recent developments regarding forest certification and timber labelling worldwide.

www.forestweb.com
Forestweb specializes in generating, aggregating, unbundling, rebundling and integrating knowledge and information on the Internet for companies in the forest products industry. You can subscribe to Forest Web's News Service at www.forestweb.com/fwsnippets/mailinglists/subscribe-news.taf

www.timberandmore.com
Timber and More was set up by an Italian company, in contact with manufacturers and experts of wood, and related technologies. The site provides statistical information, an exhibition calendar, information on training opportunities, and a company database.

www.timberfot.com
This site provides a database for the European Forest and Timber industry, developed by nine European Timber Councils. It is the aim of the European Timber Councils, on behalf of their national forest and timber industries, to promote the sale of timber in the building and construction market. Their main focus lies on the processing and dissemination of technical information for construction specialists and prospective builders.

www.ttjonline.com
Good information source on the UK and other markets.

www.boisforet.info
Good information source on the French market, including information on industries using timber, technical specifications, quality, standards. The site provides a number of interesting links including some to other sites.

www.bdholz.de
Internet site of the Gesamtverband Holzhandel e.V. includes a database of German importing and exporting companies.

www.sbh.nl
Provides statistical information on The Netherlands timber sector.

APPENDIX 13 REFERENCES

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- Sessi, 2000, Le Bois en Chiffres
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