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## Contents


Editorial - improved trade data. . . . . . . . . . .2

Africa

- Log markets . . . . . . . . . . . . . . . . . . . . . . . 2
- Sawn lumber markets. . . . . . . . . . . . . . 2/3
- Species notes . . . . . . . . . . . . . . . . . . . . . 3
- Country notes . . . . . . . . . . . . . . . . . . . .3/4

Asia

- Malaysian sawn lumber . . . . . . . . . . . . 4/5

South America

- Brazilian hardwood trade. . . . . . . . . . . . . 5

North America

- U.S. domestic market . . . . . . . . . . . . . 1/6
- U.S. export market . . . . . . . . . . . . . . . . . 6

Temperate hardwood review . . . . . . . . . . . 7

Europe

- Spain hardwood trade . . . . . . . . . . . . . . 8/9
- U.K.hardwood trade. . . . . . . . . . . . . 10/11
- France hardwood trade . . . . . . . . . . . 12/13
- German hardwood trade . . . . . . . . . 14/15


## Statistics in this issue


- **U.S. hardwood exports** . . . . . . . . . . . . . 6
  Vol. by product/region, Jan-Jul 2003
- **Temperate hardwood sawn trade**. . . 7
  Production, exports, imports
  Volume by product, UNECE countries
  Jan-Dec, 1999-2002
- **Hardwood primary and further processed wood products imports:**
  Value and volume by source country
  Years 2001-2002, Jan-Jun 2002-2003
  **Spain**. . . . . . . . . . . . . . . . . . . . . . . . 8/9
  **United Kingdom**. . . . . . . . . . . . . 10/11
  **France** . . . . . . . . . . . . . . . . . . . . . . 12/13
  **Germany**. . . . . . . . . . . . . . . . . . . . 14/15


# Steady recovery in demand for American hardwoods

Economic data released in early October indicates the U.S. recovery is continuing, but there are uncertainties. In September, chain store sales slipped and consumer confidence dipped to a six-month low, with most economists citing poor job creation as the major cause. U.S. businesses have cut about 3 million jobs since 2001 due both to slower economic conditions and productivity gains.

Nevertheless the economy is expected to grow briskly this fall, so many analysts predict businesses will feel confident enough to hire and that the recent fall in consumer confidence will be a temporary blip. The construction sector remains strong, particularly for housing, boosted by low interest rates. The Commerce Department reports that the total value of building projects under way increased 0.2% between August and July to reach the highest level since January. According to the Institute for Supply Management, U.S. manufacturing activity continued to expand in September.

According to the U.S. government's market report to the UNECE Timber Committee, activity in U.S. furniture sector is down this year compared to last, but is expected to recover marginally next year. The value of production of furniture and fixtures is expected to have reached US$101.3 billion in 2002, then to fall to US$ 97 billion this year, before staging a partial recovery to US$98 billion during 2004 (all figures adjusted to 1997 dollar values).

Most reports indicate that U.S. domestic hardwood demand remained steady during September. Demand is in excess of restricted supply for some species and grades. This is particularly true of 4/4 red oak and low grade lumber, including flooring oak, crossties, cants, and framestock. Shortages of green lumber continue to be reported widely throughout the United States. This is due both to limited log supply and strong demand from secondary manufacturers, notably for cabinets and strip flooring. Continuing supply shortages have led some traditional buyers of green lumber to augment supplies by purchasing kiln dried stocks.

Considering individual species, U.S. domestic demand is generally firm for both red oak and white oak, particularly for the lower grades. Domestic demand for ash and tulipwood is less firm, although reduced production has helped to maintain prices. Domestic demand for hard maple and cherry varies widely by grade, source of supply, and supplier. Overall demand for the common grades of these species is good from the flooring, cabinet and furniture sectors. However cost-cutting efforts by manufacturers have meant higher grade cherry and hard maple are being substituted and demand is generally slow. Demand for walnut remains firm.

### Impact of Hurricane Isabel

Hurricane Isabel carved it's way through a large section of the eastern U.S. hardwood producing areas during September. The worst affected states were Virginia and North Carolina, but damage extended into Pennsylvania, West Virginia, Maryland, New Jersey and Delaware. An immediate effect of the hurricane was to cause loss of power to mills in the worst affected areas so that on-hand log inventories could not be processed. Forests in this region have been thoroughly drenched, which will impede logging activity in the short term.

Longer term effects are harder to judge. From a supply perspective, the storms caused heavy damage to forest stands in some areas. According to the Virginia Depart- ▶ 6

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# Editorial - filling the data gap

This month's issue contains something new, and unique to hardwoodmarkets.com. Published on pages 8-15 are a series of tables providing import data for four of the E.U.'s largest timber trading countries. Both the value and volume (or tonnage) data is provided. At first sight, this may not seem revolutionary. But there is an important innovation in the way the volume data is compiled. Our experience has shown that trade data provided by Eurostat contains numerous errors. Through statistical analysis we have found that the volume data is much more prone to error than either the value or tonnage data. We have therefore devised an analytical process designed to remove all the most serious errors from the volume data and to provide estimates where necessary from the tonnage data.

Until now, reasonably reliable volume data on the E.U. wood products trade has been available only on a country by country basis from national timber trade associations. These associations provide a valuable service to their members, drawing on their own extensive contacts to clear-up problems in the Eurostat data and paint a fairly reliable picture of what is going on within national boundaries.

However, with increased globalization, the value of national data may be limited, particularly for countries trans-shipping large volumes of wood. Each national association will also tend to use their own procedures to classify product groups and rectify problems in the data, creating inconsistencies. And there may be a limit to the number of national associations a single company can join.

We are filling this information gap. Our data is still not perfect. It is just not practical to eradicate all errors from the thousands of data items supplied by Eurostat each month. However we can legitimately claim to be the first to subject data for the whole of the E.U. to regular and consistent analysis. We will be making equivalent statistics for a wider range of countries available both in our print edition and website during coming weeks. In addition to hardwoods, data provided on the website will extend to softwoods and a wider range of panel products.

Rupert Oliver

# Africa

## African logs

### Rising costs but static prices

The major supply regions north of the equator will start to emerge from the rainy season during the next few weeks. Logging conditions should progressively improve in this region until the end of the year, but significant volumes of new season logs are unlikely to reach the mills until the beginning of next year. At present log supplies continue to be restricted both by the weather and by political events. Recent tax increases in several countries, including Congo (Brazzaville), Gabon and the Central African Republic have put pressure on producers to push for higher prices. However the market is unreceptive and prices were generally stable throughout September.

### Liberian sanctions maintained

The UN has decided to maintain sanctions against Liberian log exports, so this country will not be a significant supplier for the foreseeable future. The ban mainly affects supplies to the Chinese and French markets, notably of niangon. Importers seem to have taken steps in the first quarter of 2003 to stock up on Liberian wood in advance of the UN sanctions being implemented. Niangon is also being partly substituted by a similar species from Gabon and by sapele. Together these trends have kept niangon prices stable despite the supply shortage.

European demand for African hardwood logs remains subdued. In part this reflects the long term trend amongst European countries to increase imports of sawn and further processed tropical hardwood products at the expense of logs. Short term factors related to sluggish economic conditions are also playing a role, particularly in France and Germany. Unlike most other European countries, Spain's imports of tropical logs were up during the first half of this year. But Spanish demand is also now reported to be slow and price expectations low. Portugal has much reduced purchases of iroko logs. Volumes of ayous logs available to international markets are generally declining in response to Cameroon export restrictions. In response, Italian importers have been shifting to okoume.

Chinese plywood manufacturers are in the market for peeler logs, but there is intense competition for contracts. Exporters in Gabon are under increasing competitive pressure as production is rising in the southern part of Congo (Brazaville). However okoume log production is likely to slow in coming weeks with the imminent arrival of the rainy season in production regions south of the equator. This may help to hold okoume log prices steady.

Expectations are that the fragile balance between low supplies and sluggish demand that has characterized the African log market for many months, will continue at least until the end of 2003.

# Africa

## African sawn lumber

### Divided market

There remains a clear split in the African sawn lumber market between the entandrophragmas (sapele, utile, sipo) and other species. The entandrophragmas are the dominant species derived from the Congo Basin. Although stocks of these species at source in Africa are not high, there seems to be quite a bit of volume on the ground in Europe which is discouraging forward orders. Sawmills in the Congo basin have sought to partially rectify this problem by cutting alternative species. But limited availability of other species has meant that this is not always an option. Trading conditions for mills throughout the Congo basin are now extremely difficult as demand for their main lumber product is generally weak, and as there is continuing pressure to raise prices. Mills are having difficulty building financial reserves to finance plant modernization.

The problems of mills in west Africa are different, although no less intense. Prices for species such as iroko, framire, and khaya, more dominant in west Africa than in the Congo basin, are generally firm. But political problems combined with major resource constraints mean that available supplies of logs in these species are now very limited.

European demand for African sawn lumber varies considerably by species, but is generally subdued. The much anticipated surge in purchases for winter stocks has not materialized. Since African hardwoods are usually invoiced in euros, the weakness of the dollar against the euro this year has tended to impede sales.

An increasing number of western European agents and importers are looking for new market opportunities in Eastern Europe. This is in response to the eastward shift in the European furniture and veneer sector. For example, more German importers are now selling African sawn lumber to Polish furniture manufacturers.

## Supply country news

■**Congo (Brazzaville):** Based on a World Bank study and pushed by the IMF, the government of Congo (Brazzaville) tripled taxes earlier this year despite firm opposition from the industry. A short term aim of these policies is to reduce national debt. Longer term objectives are to increase income for state investment in forest management, to increase the inherent value of logs and thereby promote greater efficiency, and to encourage greater investment in value added processing as a way of improving margins. All worthy goals, but in this instance, the measures may have been forced through too quickly and in breech of existing concession agreements. The industry claims the measures have disrupted existing forestry programs, and will undermine investor confidence. As Congo (Brazzaville) is now the only significant exporter of higher value African redwood logs, the tax rises will have a significant effect on the international trade as a whole. In order to secure sufficient margin, exporters will be pushing hard to raise log prices. This at a time when export markets are weak. Production is likely to be disrupted, at least in the northern part of the country. The large Asian companies now operating under Presidential decree in the southern part of the country seem less affected by the measures, and harvesting is expanding in this part of the country. Production in the south focuses heavily on okoume to supply China's expanding ▶4

### African indicative prices

| | Jun | Aug | Sept |
|---|---|---|---|
| Exchange rates | | | |
| U$/£ | 1.67 | 1.58 | 1.67 |
| Euro/£ | 1.45 | 1.44 | 1.41 |

All prices include agents commission of 5%

#### Sawn lumber

**Cameroon, CAR, Congo (Braz.)**
Euro/m3; FOB
Grade and size: FAS, air dried, width6"+, length 6'+

| | Jun | Aug | Sept |
|---|---|---|---|
| **Sapele** | 490 | 480 | **475** |
| **Sipo** | 615 | 560 | 550 |
| **Bibolo** | 380 | 380 | 380 |
| **N'Gollon** | 535 | 535 | 535 |
| **Iroko** | 620 | 630 | 630 |

**Cote d'Ivoire**
Euro/m3; FOB Abidjan
Grade: FAS, air dried
Size: width 6"+ avg 9"-10"; length 6'+ avg 10'-11', thickness 1"-2"

| | Jun | Aug | Sept |
|---|---|---|---|
| **Iroko** | 610 | 630 | 630 |
| **Mahogany** | 430 | 430 | 430 |
| **Framire** | 380 | 340 | 340 |
| **Samba** No.1 C&S | 240 | 240 | 240 |
| Dimension stock | | | |
| **Azobe** | 430/490 | 430/490 | 430/490 |
| **Dabema** | 300/360 | 300/360 | 320/380 |

**Gabon**
Euro/m3; FOB
Grade and size: FAS, width 6"+, length 6'+

| | Jun | Aug | Sept |
|---|---|---|---|
| **Okoume AD** | 320 | 320 | 320 |
| **Okoume KD** | 365 | 365 | 365 |

## African species notes

■**Sapele** – sawn lumber prices remain soft as European stocks are widely regarded as more than adequate to meet demand. The strong euro and availability of Asian meranti at competitive prices may also be undermining demand in north western Europe. In southern Europe, imports into Spain during the first half of 2003 were quite high, which suggests stocks may now be quite high. In the U.K. and the Netherlands, some importers are reported to be selling at below replacement cost which is deterring forward orders. However most reports suggest there is not much excess stock in Africa – so even a slight increase in forward demand could quickly translate into supply shortfalls.

■**Iroko** – the very tight supply situation for iroko sawn lumber seems to have eased a little and prices to have stabilized at a high level. Irish importers have managed to fill stocks with random sizes from Cameroon, and are buying sapele to some extent as a substitute. However they remain hungry for special sizes, typically from Ivory Coast, if they can get them. Iroko sawn lumber is also securing good prices in the U.K. and Netherlands. Portugal is currently out of the market for iroko logs.

■**Framire/emeri/idigbo** – Prices remain reasonably firm and there are reports of shortages in thicker sizes in the U.K., the main export market. Typically the species is bought in the U.K. as thicker stock (63mm and 50mm), but reports are emerging of growing U.K. demand for thinner stock. There are signs that U.K. buyers are using framire with stain for general joinery as a substitute for more expensive sapele.

■**Okoume** – Chinese buyers are in the market for logs. But there is intense competition for contracts. Gabon suppliers are under growing competitive pressure from suppliers in Congo (Brazzaville). Sales of okoume sawn lumber continue to improve as it is finding favour in Southern Europe as a ayous substitute.

■**Sipo/utile** – supply is quite limited and demand is slow. Despite potential as a mahogany substitute, few buyers seem interested in paying premium prices for the better quality offered by sipo over sapele.

■**Wawa sawn lumber** – market demand in Europe is generally slow. The U.K. market is quiet, perhaps a reflection of long-term shifts in the furniture manufacturing sector. Wawa used to be sourced by U.K. manufacturers of furniture components, which are now more typically produced in the Far East. Wawa may also have been partially substituted for MDF. Demand in Germany is also slow. However there have been steady orders from South African buyers. Although there are some reports of increased enquiries for wawa sawn lumber in the Far East, the species has yet to make any real impact in this market. Availability remains inconsistent. Shippers continue to push for higher prices but buyers are resistant.

■**Khaya** – availability remains restricted. With continuing problems in supply of South American mahogany, the U.S. continues to absorb most of the khaya made available to the international market. Good prices continue to be paid for high quality khaya sawn lumber.

■**Koto** – demand remains reasonably steady as the species is now being used as a substitute for ramin in more durable applications. Stock is once again being offered from Ivory Coast, although supplies from there are inconsistent.

■**Azobe:** shippers in Gabon, Equatorial Guinea and Congo Brazzaville are pushing for higher log prices. ITTO suggest they have targeted levels of around 155- 160 euro/m3 FOB compared with the current level of 145 euro/m3 FOB.

3◀ hardwood plywood production.

■**Central African Republic:** Major forest policy changes may soon be introduced that will affect log supplies. The new Forest Minister is planning to introduce measures to generally reduce concession sizes and favour smaller scale local operators. The policy's objective is to boost returns from forest management to local communities, but there are significant risks attached. Trade contacts suggest concessions may become too fragmented to be managed efficiently. And the new operators may lack experience and capital required to implement sustainable forest management plans.

■**Ivory Coast:** Political conditions remain unstable. Members of the rebel movement, the Patriotic Movement of Cote d"Ivoire (MPCI), withdrew from the broad-based coalition government during September in protest at the refusal of President Laurent Gbagbo to give it adequate powers. The country remains split between the southern coastal region controlled by government forces and the northern region controlled by the rebel movement. However some exporters have been making offers and wood continues to trickle out of the country. Availability from individual mills is heavily dependent on whether their concessions are located in government or rebel controlled territory. The latter territory, which is still essentially off-limits for forest operations, is estimated to account for around one third of Ivory Coast's productive forest area and 40% of annual harvest. Even without the political problems, Ivory Coast's domestic forest resources are now very restricted. Typically foresters are extracting as little as 0.25 m3/hectare/year.

■**Liberia:** The war and UN trade ban have meant that no logs are currently available from Liberia. At a meeting on 26 August 2003, the UN security Council agreed that the ban should remain in force for a period of 10 months from time of introduction on 7 July 2003. The Security Council decided that receipts from the Liberian timber industry might be used to finance continued fighting in the country. The prospects for Liberia's timber sector now seem bleak. There has been widespread looting and destruction of production facilities and machinery during the civil unrest. Even if the ban is lifted next year, much rebuilding will be required. And investors are unlikely to return until there are clearer signs of political stability. More positive news is the decision by the UN to approve the creation of a 15,000-strong peacekeeping force for Liberia to take over from a much smaller West African force which is currently stuggling to impose peace and security.



## Malaysian sawn lumber

### Market out of balance

There is an imbalance in the meranti sawn lumber market. Supply side trends suggest prices should rise. But demand side trends are holding prices down.

Malaysian production throughout the meranti range is constrained by relatively low log supply. Log quality has tended to deteriorate, leading to reduced yields. Restrictions on log imports from Indonesia have deprived mills of an important source of raw material. There were also reports of heavy rain in West Malaysia during September, implying that the monsoon may have set in early this year. Malaysian mills have also responded to lack of demand by reducing production. Rising freight rates have added to the pressure on shippers to raise C&F prices to Europe.

But the European market for meranti sawn lumber remains weak. The hoped for pick up in demand after the summer vacation has not materialized. Importers in the key Dutch market continue to sell existing landed stocks of meranti-bukit and meranti-seraya at below replacement cost in an effort to generate cash flow. In the U.K., consumption of the lighter meranti-tembaga preferred in this market is also slow. Most U.K. importers are relying heavily on just-in-time buying from existing landed stocks rather than entering the forward market.

It is now near the end of the dry season in Malaysia, so it seems some shippers are more desperate to generate cash flow from the stocks they possess. In early October, U.K. contacts suggest that Malaysian shippers have been making more offers on meranti-tembaga sawn lumber. There is a lot of competition for sales and shippers now seem willing to offer meranti-tembaga at lower C&F prices than in early September. However the trend towards lower price offers is not being applied across the whole meranti range. Reports from the Netherlands suggest that C&F prices for rough sawn PHND meranti-bukit and meranti-seraya in typical Dutch sizes have held steady due to very limited availability and rising freight rates. Furthermore non-PHND nemesu and katuku are reported to be in very short supply and C&F-prices for these timbers have continued to climb.

**Asian Sawn Lumber Indicative Prices**

| | June | Aug | Sept |
|---|---|---|---|
| Exchange rates: | | | |
| M$/£ | 6.34 | 6.01 | 6.33 |
| U$/£ | 1.67 | 1.58 | 1.67 |
| M$/US$ | 3.80 | 3.80 | 3.80 |
| **Malaysia** | | | |
| All prices US$/ton, C&F UK port, including 5% agents commission | | | |
| **West Malaysian Dark Red Meranti** | | | |
| Grade: Select & better GMS; Kiln dried | | | |
| Size: Width 6"+ avg 7"/8"; Length: 8'+ avg 12'/14' | | | |
| 1" | 790 | 800 | 780 |
| 2" | 810 | 820 | 810 |
| 2.5" | 880 | 880 | 860 |
| 3" | 930 | 910 | 900 |
| **Myanmar Teak** | | | |
| US$/50 cu ft, FOB Rangoon/Bangkok/Singapore | | | |
| Grade: Air dried boards | | | |
| Size: Width 6"+ avg 8", Length 6'+ avg 8' | | | |
| 1" | 3200/ | na | na |
| | 3400 | na | na |

*Note the teak board trade has been disrupted in recent months as the Myanmar authorities recently sacked the Forest Minister and much of the team responsible for regulating teak exports. U.S. trade sanctions against Myanmar have added to the uncertainty. At present there is insufficient trade to offer a price guide.*

### Dutch depression

This should be a busy time for the Netherlands importing trade. But the market remained quiet throughout September. As yet there are no signs of any improvement in Dutch timber consumption, which has been in a slump due to the general economic recession since the beginning of the year. During the first half of 2003, as many as 492 Dutch building companies went bankrupt, the highest level since the 1980's. Most joinery mills are maintaining only limited stocks and buying on a just-in-time basis. Joinery companies and end users are now very focused on cost-cutting and will push hard for lower prices. Faced with stiff competition and to maintain cash flow, Dutch importers are often willing to oblige.

The Dutch market has also been disrupted this year by directives issued by the Garantie Instituut Woningbouw aka GIW (Warranty Institute for House-building). The GIW determined that, effective April 1, 2003, all door and window frames, windows and doors would have to be made of solid hardwoods. The Institute indicated that sapwood may not be present in such components. The new regulations were targeted specifically at overcoming complaints and claims against the use of hemlock (with sapwood) and finger-jointed and/or laminated spruce. In theory the measures should favour use of tropical hardwood, but in practice they have added to the uncertainty. Although targeted at spruce, there are reports that consumption of finger-jointed and laminated Asian hardwoods and for S4S 72x120mm blocks has also tended to decline.

### Patchy demand in U.K.

The U.K. meranti market is not as depressed as the Dutch market, but most agents and importers report patchy demand at best. ▶5

# Asia

4◀ Traders are disappointed that low prices for meranti compared with sapele have not encouraged significant extra buying of the Asian species. Under current market conditions, there is no shortage of meranti-tembaga in the U.K. Prices on the ground are weak.

### Avoiding Indonesia

One potentially significant trend in the U.K. in recent months is that more importers now make a point of asking suppliers to ensure that meranti stock derives from Malaysia rather than Indonesia. This is due to environmentalist campaigns focused heavily on illegal logging in Indonesia.

The U.K. keruing market is also very depressed. This reflects both low consumption and the difficulties of obtaining supplies of the thin boards preferred in the U.K. Prices for kiln dried keruing boards in the U.K. are now being quoted at around US$565/ton (C&F, UK Port, inclusive of agents commission). This is an increase of around 6% during the year. Availability of keruing lumber is very restricted as more logs seem now to be diverted for plywood manufacture in the Far East. Keruing contracts to the U.K. are beginning to run late.

European demand for bangkarai, balau and selangan batu decking profiles seems to have held up reasonably well during the summer months. Good forward orders for next year also seem to be coming through. Prices are now being quoted as high as US$675/m3 (C&F inclusive of agents commission), compared with upper levels of around US$650 in June. Prices have been rising due to limited log availability, steady demand and rising freight rates.

# South America

## Brazil

### On the turn

Brazil's economy has been in technical recession this year, with contraction in the first two quarters of 2003. This has fed through into subdued domestic hardwood consumption. For example, in the first quarter of 2003, Brazilian furniture production fell 25% and the sector was operating at only 60% of capacity.

The downturn in domestic demand has been partially offset this year by a rise in exports. During the January-July 2003 period, Brazil exported tropical sawn lumber worth US$198.6 million, 17.7% more than in the same period of 2002 (US$168.8 million). A large part of this growth has been to China, the United States, and France.

China is buying increasingly large quantities of flooring blanks from Brazil in a wide variety of tropical hardwood species. Chinese companies are heavily engaged in joint ventures in the Brazil with a view to expanding this trade.

### Rising U.S. imports.

The volume of U.S. imports of Brazilian hardwood sawn lumber increased by nearly 50% during the first of half of 2003. In the January to June period, the U.S. imported 41,000 m3 of Brazilian hardwood sawn lumber valued at US$12.8 million. This compares to 28,000 m3 valued at US$10.5 million during the same period last year. These figures reveal a significant reduction in the unit value of imports. This is due the decline in expensive Brazilian mahogany imports at a time when imports of decking profiles and flooring timbers have been rising.

France has also been buying more sawn lumber from Brazil this year, apparently restocking after relatively low levels of import last year. As with the U.S., there seems also to have been a shift to imports of lower value hardwood. Spain, the only other major European market for Brazilian hardwood, has been buying less this year.

Brazil's exports of wood furniture have risen sharply during 2003. From January to July 2003, Brazil exported wooden furniture valued at US$ 298.8 million, 19.6% more than the same period the previous year (US$ 249.8 million). Brazil's furniture industry is gaining export market share by selling higher value added products. These exports include racks, shelves, office furniture, and hardwood tables.

### Hardwood plywood exports static

Weak global demand, supply problems and intensely competitive market conditions have meant that Brazil's tropical hardwood plywood exports have not increased to the same extent. Between January and August 2003, Brazilian tropical plywood exports were valued at US$145.7 million compared to US$ 145.5 million during the same period of 2003.

Emerging trends are expected to strengthen Brazil's domestic market. According to the Economist Intelligence Unit, Brazil's president, Luiz Inácio Lula da Silva, remains popular and his achievements in his first nine months in office have given foreign investors increasing confidence in his competence. This has helped lift the *real* against the dollar. The stronger *real* has reduced inflationary pressure, giving the central bank scope to cut high interest rates, which could lead to a virtuous cycle of faster growth, greater tax receipts, stronger finances and increasing investor confidence. With interest rates falling, analysts expect economic growth to be strong in the third and fourth quarters. The Economist Intelligence Unit now forecasts just 0.7% GDP growth in 2003, but a pick-up to 2.4% in 2004.

Over recent months, prices for most Brazilian hardwood products have been relatively stable in local currency terms. However the strengthening *real* against the dollar is encouraging exporters to raise dollar prices. The trend towards strengthening prices may also be encouraged by the imminent onset of the prolonged Amazonian rainy season, which usually starts around December.

The process to restart the Brazilian mahogany trade took a significant step forward in September. During the month, the Brazilian Institute of Environment and Renewable Natural Resources (IBAMA) published new rules for forest management plans for mahogany. The new measures include tighter requirements for pre-logging inventory and an increase in the minimum diameter for harvesting (from the 45 cm applied to all species to 60 cm specifically for mahogany). Brazil is also planning to adjust harvesting, transport and marketing legislation to ensure harmonization with CITES rules on mahogany exploitation which are due to enter into force on November 15 2003.

### FSC decking making progress

While Brazil has been selling increasing volumes of decking profiles to the U.S., Brazilian shippers have struggled to make any significant headway in Europe. This is despite offering significantly lower prices than their main Asian competitors. Asian species have gained a good reputation in Europe, while there have been reports of supply problems with Brazilian products. However an exception which is perhaps indicative of a longer term trend, is FSC-certified decking from Brazil. This may be finding an important niche in parts of Europe. One U.K. agent noted that he recently sold FSC-certified Brazilian massaranduba decking to an importer at around US$640/m3 (C&F U.K. port inclusive of agent's commission). This represents a fairly significant premium over the uncertified product which is selling for around US$585 C&F. But the fact that the certified massaranduba was available at a lower price than uncertified Asian bangkarai/balau decking may well have been a factor in the importer's decision.

1◀ ment of Forestry, 3 million of Virginia's 15.8 million acres of forest were damaged by the hurricane, with the worst affected areas south and east of Richmond. Early reports suggest that in forest stands in these areas some 10 to 20% of trees may have been felled. But local reports suggest that very little storm damaged lumber will make it to sawmills. It is not cost effective to recover occasional felled trees and removing timber on larger tracts with lots of downed and leaning trees is difficult and dangerous. But it is still too early to fully assess supply side implications. From a demand perspective, the storm caused an estimated $500m worth of damage. So there is likely to be considerable local demand for wood for rebuilding work.

Elsewhere, throughout the main southern and northern hardwood producing regions, log decks have generally risen over recent months in response to improved logging conditions. However inventories are still considered low for the time of year.

## U.S. hardwood exports

### Patchy pick-up in demand

Overall American hardwood exports declined during the first seven months of the year. However there were signs of a pick-up in demand during September.

In the January to July period, the volume of U.S. hardwood lumber exports fell around 2.8%. Rising exports to Canada, Mexico, mainland China and Italy compensated for big falls elsewhere. Notably weak export markets during this period were Spain, the U.K., Hong Kong, and South Korea.

Last year the unit dollar value of exported hardwood lumber declined due to the general shift from European to Asian destinations. But this year unit values are rising again due to a steady increase in the dollar price of American hardwood sawn lumber. Overall, the value of American hardwood exports during the January to July period increased by 0.7% to US$743.6 million.

**US sawn lumber indicative prices**

North Appalachian US$ MBF* CIF- W. Europe
Grade: FAS/IF, KD square edged
Net measure after kilning
NOTE US prices are highly variable depending on quality and point of orgin. These prices are shown only to highlight trends over time.
*One cubic meter is equivalent to 423.8 BF or 0.4238 MBF

| | Jun | Aug | Sept |
|---|---|---|---|
| $/£ | 1.67 | 1.58 | 1.67 |
| $/Euro | **1.15** | **1.10** | **1.17** |
| **Red oak** | | | |
| 1" | 1910 | 1950 | 1950 |
| 1.25" | 2050 | 2070 | 2070 |
| 1.5" | 2190 | 2250 | 2250 |
| 2" | 2470 | 2700 | 2700 |
| **White oak** | | | |
| 1" | 1475 | 1500 | 1500 |
| 1.25" | 1700 | 1750 | 1750 |
| 1.5" | 2150 | 2150 | 2150 |
| 2" | 2800 | 2800 | 2800 |
| **Ash** | | | |
| 1" | 1150 | 1100 | 1100 |
| 2" | 1550 | 1500 | 1500 |
| **Tulipwood** | | | |
| 1" | 1040 | 1040 | 1040 |
| 1.25" | 1125 | 1080 | 1080 |
| 1.5" | 1150 | 1100 | 1100 |
| 2" | 1180 | 1120 | 1120 |
| **Cherry** | | | |
| 1" | 3650 | 3650 | 3650 |
| 1.25" | 3750 | 3750 | 3750 |
| 1.5" | 3925 | 3850 | 3850 |
| 2" | 4100 | 3900 | 3900 |
| **Hard Maple** | | | |
| 1" | 2350 | 2300 | 2300 |
| 1.25" | 2450 | 2450 | 2450 |
| 1.5" | 2500 | 2550 | 2550 |
| 2" | 2600 | 2770 | 2770 |

Considering species trends, red oak exports have been falling to all markets outside North America this year as U.S. demand has been high. White oak exports have also been declining, due to higher prices, reduced availability and mounting competition from European oak. Only Italy and Japan have increased purchases of white oak this year. White oak exports to the important Spanish market were well down during the first seven months of 2003. Overall hard maple and cherry exports have been static, but with significant changes in destination. Exports of these species to China, Canada and Mexico have risen strongly, but have generally declined to other markets. Western red alder exports have tended to rise this year. China and Korea have been importing more American ash, but ash sales to Hong Kong have declined. Ash sales to the largest European markets, Italy and the U.K., have fallen this year. Tulipwood exports are well down this year, falling into Mexico, Italy, U.K., Hong Kong and Japan. These falls have been partly offset by rising tulipwood exports to China, Spain, and Canada.

### Southern Europe improves

During September, the close of the summer holiday period combined with relatively low stock levels has encouraged more buying in southern European countries, including Spain, Italy and Greece. European sales may have also been boosted by strengthening of the euro against the dollar from around 1.08 on 3 September to 1.17 at the start of October. The pick-up in demand has been less strong in northern Europe. Many buyers in this region remain reluctant to build speculative stock and are relying on just-in-time trading this year.

By early October, there were reports of an increase in Chinese orders for American hardwood. Much Chinese demand focuses on common grades of lumber for which there is also strong U.S. demand. As a result prices have been firm for these grades.

While export demand has shown improvement in recent weeks, competition for orders from European hardwood suppliers remains intense. European producers are particularly well placed to offer lower grades, shorter lengths and cut-to-size lumber at competitive prices. But American hardwoods remain competitive for applications requiring clearer grade lumber in longer lengths, for example for mouldings and high class joinery.

**U.S. hardwood exports January to July 2002 and 2003**

*Logs/lumber - 000s m3, veneer - mill m2*

| | 2002 | 2003 | % chng |
|---|---|---|---|
| **World** | | | |
| Logs | 1341.4 | 1297.4 | -3.3 |
| Lumber | 1658.3 | 1612.2 | -2.8 |
| Veneer | 186.6 | 172.5 | -7.6 |
| **Canada** | | | |
| Logs | 900.9 | 889.3 | -1.3 |
| Lumber | 568.3 | 617.6 | 8.7 |
| Veneer | 60.7 | 56.1 | -7.6 |
| **EU** | | | |
| Logs | 151.7 | 148.9 | -1.8 |
| Italy | 52.7 | 58.7 | 11.4 |
| Germany | 42.8 | 39.4 | -7.9 |
| Lumber | 413.6 | 372.8 | -9.9 |
| Spain | 108.9 | 94.6 | -13.1 |
| Italy | 94.8 | 100.3 | 5.8 |
| U.K. | 63.5 | 55.6 | -12.4 |
| Germany | 19.9 | 23.9 | 20.1 |
| Veneer | 64.0 | 63.2 | -1.3 |
| Germany | 25.0 | 26.4 | 5.6 |
| Spain | 16.9 | 14.8 | -12.4 |
| Italy | 6.7 | 7.6 | 13.4 |
| **SE Asia** | | | |
| Logs | 36.2 | 34.7 | -4.1 |
| Lumber | 73.7 | 67.5 | -8.4 |
| Veneer | 6.9 | 4.5 | -34.8 |
| **Greater China** | | | |
| Logs | 140.8 | 119.8 | -14.9 |
| China | 59.6 | 70.0 | 17.4 |
| Hong Kong | 63.3 | 35.8 | -43.4 |
| Taiwan | 18.0 | 14.0 | -22.2 |
| Lumber | 334.0 | 302.5 | -9.4 |
| China | 144.0 | 162.8 | 13.1 |
| Hong Kong | 148.2 | 101.1 | -31.8 |
| Taiwan | 41.8 | 38.6 | -7.7 |
| Veneer | 31.1 | 26.7 | -14.1 |
| China | 15.3 | 11.8 | -22.9 |
| Hong Kong | 10.1 | 9.9 | -2.0 |
| Taiwan | 5.7 | 5.0 | -12.3 |
| **Japan** | | | |
| Logs | 58.7 | 49.3 | -16.0 |
| Lumber | 59.4 | 59.1 | -0.5 |
| Veneer | 1.5 | 0.9 | -40.0 |
| **South Korea** | | | |
| Logs | 27.7 | 23.4 | -15.5 |
| Lumber | 23.7 | 19.4 | -18.1 |
| Veneer | 5.8 | 4.2 | -27.6 |
| **Mexico** | | | |
| Logs | 5.4 | 8.7 | 61.1 |
| Lumber | 92.7 | 107.3 | 15.7 |
| Veneer | 6.5 | 5.5 | -15.4 |
| **North Africa and Middle East** | | | |
| Logs | 2.0 | 2.0 | 0.0 |
| Lumber | 34.9 | 22.7 | -35.0 |
| Veneer | 3.8 | 2.9 | -23.7 |

# Temperate hardwood sawn lumber review

**Global production and consumption of temperate hardwood sawn lumber products stabilised during 2002 at the lower levels recorded the previous year. However there were significant shifts in the location of production and direction of trade. So says the annual UNECE Forest Products Market Analysis published in September.**

Four factors have characterised hardwood markets in 2002 and the first half of 2003:

- there is a change in the structure of the hardwood trade, with imports of semi-finished and finished products replacing those of logs and sawnwood. The growth in imports of hardwood products from eastern Europe and Asia, notably China, is significantly affecting both the manufacture of hardwood products and the trade in sawn hardwood in Europe and especially in the United States. Semi-finished and finished hardwood products include rough-sized dimension, strips, edge-glued panels, finger-jointed parts and furniture parts.
- there are discernible shifts in species preference, although to date this statement is mainly supported by anecdotal evidence and not yet by market research. In particular, there is a measured return to darker species, after a decade or more of the blonde wood trend in Europe. This is manifest in greater consumer interest in tropical species, especially in hardwood flooring, despite a fall in volumes of imported tropical sawn hardwood, and in a return to oak after some recent lean years.
- U.S. exporters face increasing competitive pressure from European hardwood producers, most recently from large Italian firms, based primarily on imported hardwood from the Balkan countries. The Italian exports are not only to Europe, but also to the U.S.
- the recent change in exchange rates between the U.S. dollar and the euro is causing the dynamics of the market to change, giving relief to United States exporters.

### Sawn hardwood production

Total production in the UNECE region of sawn temperate hardwood in 2002 remained below the 2000 peak of 46.8 million m³ for the second year running. At 43.6 million m³ there was no significant change from 2001. But there were significant shifts in the location of production:

- in the EU/EFTA region, production fell by 7.7% to 7.07 million m3 in 2002, the third consecutive drop.
- production in the "Other Europe" subregion has been rising, reaching 8.25 million m3 in 2002, up 6.6% on the previous year. This increase was due mainly to long-term growth in Romania, and partly to growth in Turkey and Latvia. However, it is notable that production in Poland is showing a long-term downward trend, by 26% in the last four years.
- in North America, production of 28.3 million m³ in 2002 remained well below its peak of 31.3 million m³ in 1999.

### Hardwood lumber consumption

Apparent sawn hardwood consumption in North America reached 26.8 million m3 during 2002, a marginal increase on 2001. During 2002, apparent consumption of sawn hardwood fell 6% in the major European markets (EU/EFTA subregion), but rose 6% in the Other Europe subregion. However consumption in the EU/EFTA subregion, at 12 million m³, remains double that in the Other Europe subregion (6 million m3).

*The UNECE/FAO Forest Products Market Analysis is available in full from www.unece.org/trade/timber/docs/fpama/2003/fpama2003a.htm. It covers the entire UNECE region comprising Western and Eastern Europe, the Confederation of Independent States (CIS), and North America.*

**Hardwood lumber production, import and export in the UNECE region**

| | 1999 | 2000 | 2001 | 2002 | Change 01/02 Volume | % |
|---|---|---|---|---|---|---|
| **Production (000s m3)** | | | | | | |
| **EU/EFTA** | **7863** | **7870** | **7657** | **7065** | **-591** | **-7.7** |
| Of which: | | | | | | |
| France | 2979 | 2968 | 2804 | 2740 | -64 | -2.3 |
| Germany | 1559 | 1320 | 1242 | 1010 | -232 | -18.7 |
| Italy | 900 | 900 | 900 | 890 | -10 | -1.1 |
| Spain | 741 | 960 | 1055 | 843 | -212 | -20.1 |
| **Other Europe** | **7300** | **7866** | **7735** | **8245** | **510** | **6.6** |
| Of which: | | | | | | |
| Turkey | 2345 | 2410 | 2645 | 2758 | 113 | 4.3 |
| Romania | 973 | 1319 | 1254 | 1432 | 178 | 14.2 |
| Latvia | 593 | 580 | 645 | 848 | 203 | 31.4 |
| Poland | 788 | 730 | 605 | 580 | -25 | -4.1 |
| **CIS** | **3349** | **4619** | **4590** | **4624** | **34** | **0.7** |
| Of which: | | | | | | |
| Russian Federation | 2465 | 2540 | 2625 | 2640 | 15 | 0.6 |
| **North America** | **31323** | **31015** | **28257** | **28279** | **21** | **0.1** |
| Canada | 1051 | 1083 | 1023 | 1042 | 19 | 1.9 |
| United States | 30272 | 29932 | 27234 | 27237 | 2 | 0 |
| **Exports (000s m3)** | | | | | | |
| **EU/EFTA** | **2429** | **2340** | **2109** | **2021** | **-87** | **-4.1** |
| Of which: | | | | | | |
| Germany | 494 | 616 | 587 | 589 | 2 | 0.3 |
| France | 719 | 661 | 580 | 588 | 8 | 1.4 |
| Belgium | 397 | 347 | 306 | 249 | -57 | -18.7 |
| **Other Europe** | **2936** | **3420** | **3215** | **3216** | **2** | **0** |
| ofwhich: | | | | | | |
| Romania | 423 | 646 | 498 | 603 | 105 | 21.1 |
| Latvia | 372 | 442 | 494 | 568 | 74 | 15 |
| Croatia | 402 | 529 | 458 | 456 | -2 | -0.4 |
| **CIS** | **757** | **603** | **559** | **613** | **54** | **9.7** |
| Of which: | | | | | | |
| Russian Federation | 303 | 391 | 375 | 440 | 65 | 17.3 |
| Ukraine | ... | 92 | 92 | 92 | 0 | 0 |
| **North America** | **4129** | **4395** | **4176** | **4307** | **131** | **3.1** |
| Canada | 1339 | 1445 | 1293 | 1429 | 136 | 10.5 |
| United States | 2790 | 2950 | 2883 | 2878 | -5 | -0.2 |
| **Imports (000s m3)** | | | | | | |
| **EU/EFTA** | **8146** | **8167** | **7621** | **7319** | **-302** | **-4** |
| Of which: | | | | | | |
| Italy | 2054 | 2076 | 1837 | 1765 | -72 | -3.9 |
| Spain | 1201 | 1124 | 1114 | 1064 | -51 | -4.6 |
| Germany | 809 | 822 | 711 | 689 | -22 | -3.1 |
| United Kingdom | 504 | 655 | 699 | 678 | -21 | -3 |
| **Other Europe** | **795** | **850** | **1149** | **995** | **-155** | **-13.4** |
| Of which: | | | | | | |
| Poland | 133 | 160 | 206 | 239 | 33 | 16.2 |
| Czech Republic | 91 | 117 | 110 | 133 | 23 | 20.9 |
| Slovenia | 120 | 143 | 122 | 131 | 9 | 7.2 |
| **CIS** | **113** | **204** | **195** | **197** | **2** | **1.1** |
| Of which: | | | | | | |
| Kazakhstan | ... | 79 | 79 | 79 | 0 | 0 |
| Moldova | ... | 53 | 53 | 53 | 0 | 0 |
| Ukraine | ... | 37 | 37 | 37 | 0 | 0 |
| **North America** | **2580** | **2864** | **2463** | **2844** | **381** | 15.5 |
| Canada | 1084 | 1182 | 1038 | 1101 | 63 | 6.1 |
| United States | 1496 | 1682 | 1425 | 1743 | 318 | 22.3 |

# Hardwood imports - Spain

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical logs** | | | | | | | | | | | | |
| CAMEROON | 7976 | 7634 | -4.3 | 3042 | 2521 | -17.1 | 31636 | 27180 | -14.1 | 10885 | 8916 | -18.1 |
| CENT. AFR. REP. | 12583 | 6810 | -45.9 | 2622 | 3616 | 37.9 | 37452 | 19379 | -48.3 | 7317 | 9639 | 31.7 |
| CONGO REPUBLIC | 4700 | 6642 | 41.3 | 2628 | 3040 | 15.7 | 13825 | 20398 | 47.5 | 8168 | 9106 | 11.5 |
| GABON | 5997 | 6085 | 1.5 | 3095 | 3124 | 0.9 | 22665 | 31061 | 37.0 | 13029 | 12591 | -3.4 |
| LIBERIA | 4237 | 4266 | 0.7 | 2738 | 2379 | -13.1 | 14130 | 11336 | -19.8 | 6800 | 7258 | 6.7 |
| EQUAT. GUINEA | 6160 | 3546 | -42.4 | 1757 | 1683 | -4.2 | 33091 | 17743 | -46.4 | 9255 | 8522 | -7.9 |
| OTHER | 8111 | 6579 | -18.9 | 3528 | 5366 | 52.1 | 22002 | 13486 | -38.7 | 7130 | 8509 | 19.3 |
| **TOTAL** | **49764** | **41562** | **-16.5** | **19410** | **21729** | **11.9** | **174801** | **140583** | **-19.6** | **62584** | **64541** | **3.1** |
| **Beech logs** | | | | | | | | | | | | |
| FRANCE | 8118 | 6657 | -18.0 | 3853 | 3932 | 2.1 | 65813 | 62252 | -5.4 | 30100 | 37173 | 23.5 |
| GERMANY | 2351 | 3086 | 31.3 | 2022 | 1858 | -8.1 | 7517 | 7539 | 0.3 | 5151 | 8429 | 63.6 |
| BELGIUM | 1495 | 1491 | -0.3 | 261 | 238 | -8.8 | 7174 | 7219 | 0.6 | 801 | 872 | 8.9 |
| UKRAINE | 860 | 671 | -22.0 | 495 | 312 | -37.0 | 3378 | 2846 | -15.7 | 2059 | 1375 | -33.2 |
| SLOVAKIA | 419 | 569 | 35.8 | 420 | 170 | -59.5 | 2890 | 2086 | -27.8 | 1518 | 476 | -68.6 |
| OTHER | 756 | 948 | 25.4 | 236 | 1657 | 602.1 | 3196 | 3686 | 15.3 | 912 | 7301 | 700.5 |
| **TOTAL** | **13999** | **13422** | **-4.1** | **7287** | **8167** | **12.1** | **89968** | **85628** | **-4.8** | **40541** | **55626** | **37.2** |
| **Oak logs** | | | | | | | | | | | | |
| FRANCE | 12577 | 10234 | -18.6 | 6145 | 5667 | -7.8 | 130381 | 65148 | -50.0 | 45178 | 34684 | -23.2 |
| GERMANY | 5116 | 4578 | -10.5 | 2053 | 3276 | 59.6 | 17092 | 13759 | -19.5 | 5964 | 11798 | 97.8 |
| UKRAINE | 2827 | 2457 | -13.1 | 1563 | 1829 | 17.0 | 8199 | 8068 | -1.6 | 5044 | 6056 | 20.1 |
| U.S.A. | 3306 | 2406 | -27.2 | 1705 | 1816 | 6.5 | 12621 | 5486 | -56.5 | 4023 | 6019 | 49.6 |
| POLAND | 321 | 866 | 169.8 | 414 | 869 | 109.9 | 512 | 1168 | 128.1 | 554 | 1229 | 121.8 |
| OTHER | 1006 | 1045 | 3.9 | 390 | 1366 | 250.3 | 2559 | 2347 | -8.3 | 764 | 3971 | 419.8 |
| **TOTAL** | **25153** | **21586** | **-14.2** | **12270** | **14823** | **20.8** | **171364** | **95976** | **-44.0** | **61527** | **63757** | **3.6** |
| **Other hardwood logs** | | | | | | | | | | | | |
| U.S.A. | 10637 | 8785 | -17.4 | 5708 | 7215 | 26.4 | 9377 | 9160 | -2.3 | 6064 | 8003 | 32.0 |
| FRANCE | 9838 | 5817 | -40.9 | 2968 | 2798 | -5.7 | 83137 | 66101 | -20.5 | 33221 | 27920 | -16.0 |
| GERMANY | 260 | 626 | 140.8 | 432 | 166 | -61.6 | 481 | 1131 | 135.1 | 1007 | 149 | -85.2 |
| CANADA | 638 | 408 | -36.1 | 332 | 256 | -22.9 | 707 | 731 | 3.4 | 595 | 311 | -47.7 |
| RUSSIA | 1124 | 274 | -75.6 | 137 | 54 | -60.6 | 2136 | 832 | -61.0 | 274 | 441 | 60.9 |
| OTHER | 3510 | 899 | -74.4 | 495 | 652 | 31.7 | 15867 | 3636 | -77.1 | 2287 | 1220 | -46.7 |
| **TOTAL** | **26007** | **16809** | **-35.4** | **10072** | **11141** | **10.6** | **111705** | **81591** | **-27.0** | **43448** | **38044** | **-12.4** |
| **Tropical sawn lumber** | | | | | | | | | | | | |
| CAMEROON | 75622 | 60784 | -19.6 | 26263 | 33783 | 28.6 | 171848 | 139693 | -18.7 | 60488 | 116441 | 92.5 |
| IVORY COAST | 59601 | 45569 | -23.5 | 25362 | 16912 | -33.3 | 134552 | 98312 | -26.9 | 55041 | 35408 | -35.7 |
| BRAZIL | 42985 | 39923 | -7.1 | 21670 | 15835 | -26.9 | 149717 | 115169 | -23.1 | 59255 | 54404 | -8.2 |
| CONGO REPUBLIC | 7504 | 12633 | 68.4 | 5910 | 5806 | -1.8 | 14719 | 25507 | 73.3 | 11653 | 13033 | 11.8 |
| CENT. AFR. REP. | 6694 | 6407 | -4.3 | 2634 | 2946 | 11.8 | 13597 | 13677 | 0.6 | 5912 | 6128 | 3.7 |
| PORTUGAL | 1190 | 3014 | 153.3 | 1336 | 2589 | 93.8 | 2137 | 6292 | 194.4 | 2455 | 6976 | 184.2 |
| U.S.A. | 669 | 2129 | 218.2 | 766 | 1288 | 68.1 | 1101 | 1097 | -0.4 | 517 | 621 | 20.1 |
| FRANCE | 1547 | 1894 | 22.4 | 785 | 829 | 5.6 | 2772 | 3522 | 27.1 | 1272 | 1842 | 44.8 |
| GABON | 1419 | 1807 | 27.3 | 849 | 465 | -45.2 | 3371 | 4048 | 20.1 | 2006 | 1075 | -46.4 |
| EQUAT. GUINEA | 1176 | 1558 | 32.5 | 841 | 628 | -25.3 | 2802 | 3229 | 15.2 | 1813 | 1103 | -39.2 |
| GHANA | 2629 | 1422 | -45.9 | 800 | 1504 | 88.0 | 5665 | 3054 | -46.1 | 1738 | 2951 | 69.8 |
| OTHER | 6516 | 5938 | -8.9 | 2781 | 5079 | 82.6 | 11023 | 10132 | -8.1 | 4409 | 10689 | 142.4 |
| **TOTAL** | **207552** | **183078** | **-11.8** | **89997** | **87664** | **-2.6** | **513304** | **423732** | **-17.5** | **206559** | **250671** | **21.4** |
| **Beech sawn lumber** | | | | | | | | | | | | |
| GERMANY | 13270 | 11364 | -14.4 | 7395 | 6449 | -12.8 | 50947 | 44349 | -13.0 | 30300 | 43413 | 43.3 |
| FRANCE | 8845 | 8451 | -4.5 | 5581 | 5218 | -6.5 | 39188 | 38110 | -2.8 | 24614 | 31524 | 28.1 |
| UKRAINE | 3366 | 3333 | -1.0 | 1850 | 1523 | -17.7 | 6667 | 5840 | -12.4 | 3178 | 2904 | -8.6 |
| ROMANIA | 2142 | 2811 | 31.2 | 1340 | 2296 | 71.3 | 5725 | 6838 | 19.4 | 3500 | 5479 | 56.5 |
| ITALY | 1380 | 2170 | 57.2 | 948 | 1685 | 77.7 | 3015 | 4321 | 43.3 | 1864 | 3485 | 87.0 |
| CROATIA | 1476 | 1999 | 35.4 | 1208 | 1834 | 51.8 | 5041 | 5066 | 0.5 | 3071 | 4752 | 54.7 |
| SLOVENIA | 1692 | 1933 | 14.2 | 1053 | 954 | -9.4 | 3168 | 3337 | 5.3 | 1859 | 1810 | -2.6 |
| SERBIA & MONT. | 377 | 1076 | 185.4 | 348 | 750 | 115.5 | 723 | 3059 | 323.1 | 942 | 1803 | 91.4 |
| BOSNIA & HERZ. | 471 | 1025 | 117.6 | 483 | 816 | 68.9 | 1664 | 2301 | 38.3 | 1156 | 2008 | 73.7 |
| OTHER | 3840 | 4314 | 12.3 | 2441 | 3701 | 51.6 | 13947 | 13667 | -2.0 | 7895 | 10679 | 35.3 |
| **TOTAL** | **36859** | **38476** | **4.4** | **22647** | **25226** | **11.4** | **130085** | **126888** | **-2.5** | **78379** | **107857** | **37.6** |
| **Oak sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 109593 | 88538 | -19.2 | 50993 | 40803 | -20.0 | 223782 | 233300 | 4.3 | 111683 | 72118 | -35.4 |
| CANADA | 8957 | 8552 | -4.5 | 4324 | 3822 | -11.6 | 13873 | 17375 | 25.2 | 7062 | 6872 | -2.7 |
| FRANCE | 6678 | 4631 | -30.7 | 2488 | 3283 | 32.0 | 50360 | 6756 | -86.6 | 3449 | 6892 | 99.8 |
| BELGIUM | 3414 | 2784 | -18.5 | 1816 | 2285 | 25.8 | 2768 | 2164 | -21.8 | 1412 | 1874 | 32.7 |
| UKRAINE | 1572 | 2754 | 75.2 | 1088 | 2050 | 88.4 | 4665 | 7832 | 67.9 | 3321 | 5337 | 60.7 |
| ROMANIA | 1596 | 1602 | 0.4 | 1160 | 602 | -48.1 | 2805 | 2704 | -3.6 | 2012 | 1093 | -45.7 |
| ITALY | 1233 | 1305 | 5.8 | 583 | 485 | -16.8 | 2146 | 2098 | -2.2 | 916 | 320 | -65.1 |
| GERMANY | 2015 | 1173 | -41.8 | 624 | 512 | -17.9 | 4304 | 2470 | -42.6 | 1286 | 1247 | -3.0 |
| POLAND | 486 | 451 | -7.2 | 186 | 243 | 30.6 | 836 | 646 | -22.7 | 228 | 317 | 39.0 |
| OTHER | 2758 | 2173 | -21.2 | 1389 | 724 | -47.9 | 7497 | 6226 | -17.0 | 3913 | 2304 | -41.1 |
| **TOTAL** | **138302** | **113963** | **-17.6** | **64651** | **54809** | **-15.2** | **313036** | **281571** | **-10.1** | **135282** | **98374** | **-27.3** |
| **Other hardwood sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 16576 | 17803 | 7.4 | 10085 | 10111 | 0.3 | 19993 | 17045 | -14.7 | 9335 | 11177 | 19.7 |
| CANADA | 6470 | 8327 | 28.7 | 4587 | 4079 | -11.1 | 6227 | 8872 | 42.5 | 4720 | 4452 | -5.7 |
| FRANCE | 4214 | 3563 | -15.4 | 2060 | 1808 | -12.2 | 16738 | 16789 | 0.3 | 9095 | 8689 | -4.5 |
| LATVIA | 2554 | 2555 | 0.0 | 1083 | 1429 | 31.9 | 25741 | 29369 | 14.1 | 16084 | 12356 | -23.2 |
| PORTUGAL | 619 | 1387 | 124.1 | 300 | 691 | 130.3 | 3532 | 7517 | 112.8 | 1587 | 2498 | 57.4 |
| ROMANIA | 387 | 776 | 100.5 | 356 | 440 | 23.6 | 905 | 2588 | 186.0 | 801 | 1957 | 144.3 |
| SERBIA & MONT. | 29 | 568 | 1858.6 | 252 | 179 | -29.0 | 89 | 1010 | 1034.8 | 452 | 398 | -11.9 |
| SWEDEN | 568 | 548 | -3.5 | 528 | 182 | -65.5 | 2287 | 2629 | 15.0 | 2532 | 932 | -63.2 |
| OTHER | 4044 | 3515 | -13.1 | 1964 | 1746 | -11.1 | 15097 | 15101 | 0.0 | 9049 | 5690 | -37.1 |
| **TOTAL** | **35461** | **39042** | **10.1** | **21215** | **20665** | **-2.6** | **90609** | **100920** | **11.4** | **53655** | **48149** | **-10.3** |
| **Tropical hardwood veneer** | | | | | | | | | | | | |
| IVORY COAST | 16339 | 12471 | -23.7 | 6944 | 6571 | -5.4 | 45672 | 38641 | -15.4 | 17938 | 12103 | -32.5 |
| GHANA | 6026 | 7172 | 19.0 | 3283 | 4232 | 28.9 | 10808 | 12685 | 17.4 | 5485 | 7469 | 36.2 |
| EQUAT. GUINEA | 6318 | 6291 | -0.4 | 2808 | 2576 | -8.3 | 18227 | 15606 | -14.4 | 7707 | 6289 | -18.4 |
| GERMANY | 771 | 3261 | 323.0 | 2222 | 1366 | -38.5 | 303 | 1235 | 307.6 | 867 | 473 | -45.4 |
| PORTUGAL | 1214 | 1889 | 55.6 | 928 | 1406 | 51.5 | 789 | 1368 | 73.4 | 684 | 1826 | 167.0 |
| CAMEROON | 1947 | 1769 | -9.1 | 1305 | 653 | -50.0 | 4299 | 3900 | -9.3 | 2842 | 1565 | -44.9 |
| OTHER | 4836 | 6447 | 33.3 | 3357 | 5271 | 57.0 | 5157 | 6871 | 33.2 | 3460 | 6443 | 86.2 |
| **TOTAL** | **37451** | **39300** | **4.9** | **20847** | **22075** | **5.9** | **85255** | **80306** | **-5.8** | **38982** | **36168** | **-7.2** |
| **Other hardwood veneer** | | | | | | | | | | | | |
| U.S.A. | 47426 | 51212 | 8.0 | 26093 | 25458 | -2.4 | 19942 | 22994 | 15.3 | 11642 | 11360 | -2.4 |
| GERMANY | 15002 | 11608 | -22.6 | 4135 | 7867 | 90.3 | 6975 | 5046 | -27.7 | 1999 | 3587 | 79.4 |
| ROMANIA | 728 | 6087 | 736.1 | 2509 | 4976 | 98.3 | 679 | 4865 | 616.5 | 2213 | 3826 | 72.9 |
| ITALY | 5670 | 4967 | -12.4 | 2247 | 3727 | 65.9 | 2478 | 2387 | -3.7 | 1206 | 1828 | 51.6 |
| CROATIA | 4247 | 3912 | -7.9 | 2078 | 2603 | 25.3 | 4534 | 3934 | -13.2 | 1825 | 1887 | 3.4 |
| BELGIUM | 2741 | 2418 | -11.8 | 898 | 1434 | 59.7 | 1151 | 1009 | -12.3 | 345 | 969 | 180.9 |
| OTHER | 13784 | 14255 | 3.4 | 6025 | 11055 | 83.5 | 15168 | 12917 | -14.8 | 6207 | 11658 | 87.8 |
| **TOTAL** | **89598** | **94459** | **5.4** | **43985** | **57120** | **29.9** | **50926** | **53151** | **4.4** | **25438** | **35115** | **38.0** |

***Spanish economic growth, forecast at 1.8% this year, is low by recent standards but will be the highest of the large EU economies.*** The Spanish economy is widely expected to expand more robustly in 2004 as the global economy recovers. Construction sector growth has slowed this year, but this sector remains dynamic. Housing construction activity is still strong, boosted by low euro-zone interest rates. Spain's joinery manufacturers continue to report reasonable levels of activity this year. By contrast activity in Spain's furniture sector has been sluggish due to rising competition from imported goods. Spain's manufacturing sector seems now to be very heavily focused on cost-cutting, which is impacting on the range of wood products imported into the country.

### Rebounding log imports

Spain's imports of tropical logs have rebounded slightly this year after declining during 2002. Log imports from the Central African Republic and Congo Republic are rising as availability from Cameroon has declined. There has also been a significant recovery in temperate hardwood log imports this year after a decline last year. Beech log imports have risen mainly from France and Germany, although there seems to have been a significant shift to lower value logs. Shortages of oak logs in France have led to a partial shift to German and Ukrainian oak logs. Imports of logs from the United States have also been rising during 2003, perhaps encouraged by the strong euro-dollar exchange rate and high prices for American sawn lumber. Spanish import volumes of tropical sawn lumber have grown significantly this year, but again there seems to have been a shift to lower value material.

Problems of sourcing iroko and other species from Ivory Coast have encouraged a significant switch to Cameroon supplies. The progressive introduction of

# Hardwood imports - Spain

log export bans from Cameroon may also have encouraged a switch to sawn lumber from this country. But the very high level of sawn lumber import from Cameroon during the first 6 months of 2003 may indicate that Spain is currently carrying relatively high stocks of sapele sawn lumber.

### Brazilian decline

Spanish imports of Brazilian hardwood - much of which comprises jatoba and other flooring species - has been declining this year.

The temperate hardwood sawn lumber data reveals divergent trends. There has been a significant rise in beech lumber imports, with most major supply countries in West and East Europe benefiting. However anecdotal reports in September 2003 suggest that this market segment may now be heavily stocked, raising uncertainty over likely levels of new season demand.

Spain's imports of oak lumber are well down this year. This may be indicative of the unwillingness of Spanish importers to pay high prices for American white oak. There certainly seems to have been a big drop in Spanish oak lumber imports from North America, while imports of European oak from France, Belgium and the Ukraine have risen sharply.

### More non-oak imports

Spain has been importing more non-oak hardwood lumber from the United States this year at a lower unit value than last year. This seems indicative of cost-cutting efforts by Spanish manufacturers. Perhaps also indicative of this trend, is the big rise in Spanish veneer imports during the first half of 2003. There may be continuing replacement of solid timber by veneered panels for certain applications. Much of this year's growth in hardwood veneer imports has focused on temperate species from Europe rather than tropical or American hardwoods.

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical hardwood plywood** | | | | | | | | | | | | |
| LATVIA | 748 | 1849 | 147.2 | 798 | 941 | 17.9 | 1571 | 4142 | 163.7 | 1308 | 1465 | 12.0 |
| FRANCE | 4377 | 1488 | -66.0 | 741 | 731 | -1.3 | 6628 | 2458 | -62.9 | 1162 | 1250 | 7.6 |
| CHINA | 161 | 1106 | 587.0 | 666 | 349 | -47.6 | 443 | 3320 | 649.4 | 1639 | 1321 | -19.4 |
| BRAZIL | 784 | 986 | 25.8 | 500 | 460 | -8.0 | 1981 | 2648 | 33.7 | 1320 | 1632 | 23.6 |
| POLAND | 469 | 959 | 104.5 | 401 | 575 | 43.4 | 965 | 1775 | 83.9 | 742 | 1000 | 34.8 |
| GERMANY | 465 | 678 | 45.8 | 457 | 274 | -40.0 | 418 | 794 | 90.0 | 598 | 409 | -31.6 |
| OTHER | 1418 | 1641 | 15.7 | 730 | 1020 | 39.7 | 2454 | 3029 | 23.4 | 1276 | 1775 | 39.1 |
| **TOTAL** | **8422** | **8707** | **3.4** | **4293** | **4350** | **1.3** | **14460** | **18167** | **25.6** | **8045** | **8852** | **10.0** |
| **Other hardwood plywood** | | | | | | | | | | | | |
| FINLAND | 40797 | 31849 | -21.9 | 17007 | 18414 | 8.3 | 36992 | 48156 | 30.2 | 25604 | 29346 | 14.6 |
| FRANCE | 2744 | 2658 | -3.1 | 1355 | 1637 | 20.8 | 4144 | 3978 | -4.0 | 2146 | 1838 | -14.4 |
| RUSSIA | 3452 | 2408 | -30.2 | 998 | 924 | -7.4 | 12387 | 6231 | -49.7 | 2510 | 2916 | 16.2 |
| ROMANIA | 0 | 437 | na | 78 | 369 | 373.1 | 0 | 625 | na | 107 | 534 | 399.1 |
| POLAND | 39 | 423 | 984.6 | 0 | 217 | na | 58 | 1271 | 2091.4 | 0 | 644 | na |
| UKRAINE | 9 | 257 | 2755.6 | 18 | 164 | 811.1 | 31 | 491 | 1483.9 | 29 | 287 | 889.7 |
| OTHER | 737 | 1166 | 58.2 | 541 | 2419 | 347.1 | 872 | 2383 | 173.3 | 951 | 3084 | 224.3 |
| **TOTAL** | **47778** | **39198** | **-18.0** | **19997** | **24144** | **20.7** | **54484** | **63135** | **15.9** | **31348** | **38649** | **23.3** |
| **Sleepers** | | | | | | | | | | | | |
| FRANCE | 3517 | 3031 | -13.8 | 1350 | 1161 | -14.0 | 12745 | 8336 | -34.6 | 7152 | 3271 | -54.3 |
| GERMANY | 444 | 859 | 93.5 | 266 | 369 | 38.7 | 6601 | 8436 | 27.8 | 4343 | 3225 | -25.7 |
| BRAZIL | 479 | 441 | -7.9 | 405 | 66 | -83.7 | 1112 | 1065 | -4.2 | 950 | 219 | -76.9 |
| U.S.A. | 1955 | 289 | -85.2 | 223 | 0 | -100.0 | 4258 | 655 | -84.6 | 355 | 0 | -100.0 |
| OTHER | 97 | 245 | 152.6 | 121 | 164 | 35.5 | 1704 | 1525 | -10.5 | 342 | 1133 | 231.3 |
| **TOTAL** | **6492** | **4865** | **-25.1** | **2365** | **1760** | **-25.6** | **26420** | **20017** | **-24.2** | **13142** | **7848** | **-40.3** |

| | Value (1000s euros) | | | | | | Weight (tonnes) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Planed, sanded and finger-jointed hardwood** | | | | | | | | | | | | |
| POLAND | 4088 | 4066 | -0.5 | 1833 | 2142 | 16.9 | 4284 | 8952 | 109.0 | 3901 | 5013 | 28.5 |
| FRANCE | 1964 | 3130 | 59.4 | 1509 | 1297 | -14.0 | 2621 | 3898 | 48.7 | 1732 | 1596 | -7.9 |
| PORTUGAL | 1422 | 1426 | 0.3 | 731 | 549 | -24.9 | 1998 | 2448 | 22.5 | 1316 | 542 | -58.8 |
| U.S.A. | 1416 | 1157 | -18.3 | 509 | 413 | -18.9 | 1817 | 1171 | -35.6 | 547 | 694 | 26.9 |
| CROATIA | 1110 | 906 | -18.4 | 460 | 375 | -18.5 | 2472 | 1629 | -34.1 | 524 | 513 | -2.1 |
| OTHER | 6045 | 7424 | 22.8 | 3508 | 3043 | -13.3 | 10164 | 12142 | 19.5 | 5611 | 5284 | -5.8 |
| **TOTAL** | **16045** | **18109** | **12.9** | **8550** | **7819** | **-8.5** | **23356** | **30240** | **29.5** | **13631** | **13642** | **0.1** |
| **Hardwood profiles** | | | | | | | | | | | | |
| CHINA | 9881 | 8611 | -12.9 | 3589 | 5487 | 52.9 | 6465 | 5731 | -11.4 | 2424 | 3318 | 36.9 |
| FRANCE | 6440 | 6005 | -6.8 | 3221 | 3649 | 13.3 | 4697 | 2753 | -41.4 | 1892 | 1412 | -25.4 |
| POLAND | 4595 | 5815 | 26.6 | 2891 | 2696 | -6.7 | 4532 | 5543 | 22.3 | 2781 | 2889 | 3.9 |
| ITALY | 5060 | 4971 | -1.8 | 2189 | 3384 | 54.6 | 856 | 929 | 8.5 | 406 | 577 | 42.1 |
| OTHER | 30314 | 26117 | -13.8 | 13354 | 14353 | 7.5 | 22972 | 19107 | -16.8 | 9705 | 10795 | 11.2 |
| **TOTAL** | **56290** | **51519** | **-8.5** | **25244** | **29569** | **17.1** | **39522** | **34063** | **-13.8** | **17208** | **18991** | **10.4** |
| **Planed hardwood veneers** | | | | | | | | | | | | |
| GERMANY | 609 | 1509 | 147.8 | 584 | 261 | -55.3 | 275 | 286 | 4.0 | 130 | 45 | -65.4 |
| PORTUGAL | 426 | 364 | -14.6 | 286 | 222 | -22.4 | 68 | 137 | 101.5 | 57 | 127 | 122.8 |
| OTHER | 290 | 1506 | 419.3 | 936 | 224 | -76.1 | 151 | 453 | 200.0 | 285 | 94 | -67.0 |
| **TOTAL** | **1325** | **3379** | **155.0** | **1806** | **707** | **-60.9** | **494** | **876** | **77.3** | **472** | **266** | **-43.6** |
| **Windows and their frames** | | | | | | | | | | | | |
| DENMARK | 12393 | 20977 | 69.3 | 9524 | 10825 | 13.7 | 2490 | 4975 | 99.8 | 3457 | 1402 | -59.4 |
| FRANCE | 3305 | 4242 | 28.4 | 1867 | 1891 | 1.3 | 1032 | 1348 | 30.6 | 590 | 639 | 8.3 |
| HUNGARY | 163 | 3520 | 2059.5 | 1144 | 1141 | -0.3 | 59 | 985 | 1569.5 | 324 | 290 | -10.5 |
| POLAND | 612 | 939 | 53.4 | 430 | 948 | 120.5 | 187 | 264 | 41.2 | 117 | 278 | 137.6 |
| OTHER | 3491 | 1033 | -70.4 | 478 | 886 | 85.4 | 914 | 274 | -70.0 | 107 | 277 | 158.9 |
| **TOTAL** | **19964** | **30711** | **53.8** | **13443** | **15691** | **16.7** | **4682** | **7846** | **67.6** | **4595** | **2886** | **-37.2** |
| **Doors and their frames** | | | | | | | | | | | | |
| PORTUGAL | 4731 | 5401 | 14.2 | 2212 | 2297 | 3.8 | 2902 | 3198 | 10.2 | 1315 | 1586 | 20.6 |
| FRANCE | 948 | 1203 | 26.9 | 658 | 400 | -39.2 | 280 | 529 | 88.9 | 260 | 239 | -8.1 |
| U.S.A. | 1041 | 899 | -13.6 | 714 | 375 | -47.5 | 958 | 821 | -14.3 | 634 | 416 | -34.4 |
| BRAZIL | 388 | 688 | 77.3 | 312 | 448 | 43.6 | 232 | 342 | 47.4 | 172 | 312 | 81.4 |
| OTHER | 3029 | 3425 | 13.1 | 1692 | 1552 | -8.3 | 1749 | 1993 | 14.0 | 934 | 863 | -7.6 |
| **TOTAL** | **10137** | **11616** | **14.6** | **5588** | **5072** | **-9.2** | **6121** | **6883** | **12.4** | **3315** | **3416** | **3.0** |
| **Parquet panels** | | | | | | | | | | | | |
| SWEDEN | 17419 | 18799 | 7.9 | 7839 | 10042 | 28.1 | 8011 | 7901 | -1.4 | 3140 | 3650 | 16.2 |
| GERMANY | 6709 | 8905 | 32.7 | 4388 | 5626 | 28.2 | 3841 | 5222 | 36.0 | 2235 | 3659 | 63.7 |
| DENMARK | 6347 | 8737 | 37.7 | 4095 | 4185 | 2.2 | 4040 | 3476 | -14.0 | 1603 | 1649 | 2.9 |
| FRANCE | 4378 | 5937 | 35.6 | 2423 | 1597 | -34.1 | 3074 | 3382 | 10.0 | 1201 | 1069 | -11.0 |
| OTHER | 39856 | 38005 | -4.6 | 20373 | 23130 | 13.5 | 24929 | 24519 | -1.6 | 13575 | 12554 | -7.5 |
| **TOTAL** | **74709** | **80383** | **7.6** | **39118** | **44580** | **14.0** | **43895** | **44500** | **1.4** | **21754** | **22581** | **3.8** |
| **Wooden furniture** | | | | | | | | | | | | |
| ITALY | 70193 | 83158 | 18.5 | 38636 | 45806 | 18.6 | 13322 | 14349 | 7.7 | 6165 | 7420 | 20.4 |
| FRANCE | 66806 | 66141 | -1.0 | 19719 | 62920 | 219.1 | 24125 | 23378 | -3.1 | 6136 | 24434 | 298.2 |
| INDONESIA | 48311 | 51355 | 6.3 | 26051 | 32679 | 25.4 | 17463 | 20092 | 15.1 | 9884 | 13428 | 35.9 |
| PORTUGAL | 16883 | 23954 | 41.9 | 8179 | 11353 | 38.8 | 5156 | 4966 | -3.7 | 2240 | 2891 | 29.1 |
| CHINA | 18195 | 22180 | 21.9 | 10223 | 21697 | 112.2 | 7453 | 9670 | 29.7 | 4457 | 10517 | 136.0 |
| GERMANY | 22857 | 19641 | -14.1 | 8265 | 10120 | 22.4 | 4111 | 4060 | -1.2 | 1779 | 2333 | 31.1 |
| VIETNAM | 11465 | 13233 | 15.4 | 10165 | 10429 | 2.6 | 3826 | 4531 | 18.4 | 3460 | 4409 | 27.4 |
| SWEDEN | 10302 | 9822 | -4.7 | 4058 | 5284 | 30.2 | 5475 | 5184 | -5.3 | 2145 | 2555 | 19.1 |
| OTHER | 80969 | 91433 | 12.9 | 45500 | 57447 | 26.3 | 31708 | 41093 | 29.6 | 20526 | 26201 | 27.6 |
| **TOTAL** | **345981** | **380917** | **10.1** | **170796** | **257735** | **50.9** | **112639** | **127323** | **13.0** | **56792** | **94188** | **65.8** |

*Data sources: data is derived from data supplied by BTS Ltd drawn from Eurostat. Value and weight data is provided as supplied by BTS. Due to numerous errors in the Eurostat volume data, data provided here is estimated where necessary from weight data. For breakdown of harmonised system (HS) codes used to prepare these tables see page 15.*

The wood furniture data suggests one good reason for cost-cutting by Spanish manufacturers. Spanish imports of wood furniture have shot-up over the last 18 months. As this data includes both finished wood furniture and furniture components, the sharp rise in imports does not necessarily imply complete substitution of Spanish furniture by "foreign imports". It may equally reflect moves by Spanish manufacturers to import more components for assembly in Spain.

# Hardwood imports - United Kingdom

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical logs** | | | | | | | | | | | | |
| LIBERIA | 1741 | 1578 | -9.4 | 806 | 509 | -36.8 | 6098 | 5631 | -7.7 | 2917 | 2149 | -26.3 |
| U.S.A. | 1818 | 1329 | -26.9 | 519 | 610 | 17.5 | 715 | 472 | -34.0 | 214 | 209 | -2.3 |
| BELGIUM | 63 | 1272 | 1919.0 | 965 | 0 | -100.0 | 231 | 2318 | 903.5 | 1666 | 0 | -100.0 |
| GERMANY | 813 | 947 | 16.5 | 430 | 186 | -56.7 | 3093 | 2320 | -25.0 | 1814 | 429 | -76.4 |
| IVORY COAST | 1016 | 857 | -15.6 | 468 | 334 | -28.6 | 1690 | 1336 | -20.9 | 738 | 519 | -29.7 |
| OTHER | 6451 | 3999 | -38.0 | 2103 | 1930 | -8.2 | 11793 | 8718 | -26.1 | 3733 | 2990 | -19.9 |
| **TOTAL** | **11902** | **9982** | **-16.1** | **5291** | **3569** | **-32.5** | **23620** | **20795** | **-12.0** | **11082** | **6296** | **-43.2** |
| **Beech logs** | | | | | | | | | | | | |
| FRANCE | 382 | 288 | -24.6 | 185 | 156 | -15.7 | 347 | 453 | 30.5 | 310 | 195 | -37.1 |
| ROMANIA | 98 | 199 | 103.1 | 24 | 94 | 291.7 | 133 | 206 | 54.9 | 42 | 82 | 95.2 |
| POLAND | 0 | 190 | na | 41 | 73 | 78.0 | 0 | 192 | na | 45 | 83 | 84.4 |
| CYPRUS | 0 | 156 | na | 120 | 0 | -100.0 | 0 | 88 | na | 63 | 0 | -100.0 |
| CANADA | 0 | 126 | na | 40 | 0 | -100.0 | 0 | 187 | na | 62 | 0 | -100.0 |
| OTHER | 258 | 300 | 16.3 | 160 | 824 | 415.0 | 244 | 355 | 45.5 | 237 | 1067 | 350.2 |
| **TOTAL** | **738** | **1259** | **70.6** | **570** | **1147** | **101.2** | **724** | **1481** | **104.6** | **759** | **1427** | **88.0** |
| **Oak logs** | | | | | | | | | | | | |
| FRANCE | 1916 | 3358 | 75.3 | 1615 | 4219 | 161.2 | 14288 | 18839 | 31.9 | 6049 | 11756 | 94.3 |
| U.S.A. | 2811 | 1761 | -37.4 | 836 | 1454 | 73.9 | 2977 | 3100 | 4.1 | 1230 | 2501 | 103.3 |
| NETHERLANDS | 94 | 744 | 691.5 | 234 | 820 | 250.4 | 350 | 1764 | 404.0 | 673 | 2007 | 198.2 |
| ITALY | 0 | 330 | na | 181 | 35 | -80.7 | 0 | 965 | na | 629 | 46 | -92.7 |
| GERMANY | 135 | 329 | 143.7 | 15 | 461 | 2973.3 | 226 | 1124 | 397.3 | 68 | 3209 | 4619.1 |
| OTHER | 1116 | 716 | -35.8 | 308 | 321 | 4.2 | 3758 | 2984 | -20.6 | 935 | 983 | 5.1 |
| **TOTAL** | **6072** | **7238** | **19.2** | **3189** | **7310** | **129.2** | **21599** | **28776** | **33.2** | **9584** | **20502** | **113.9** |
| **Other hardwood logs** | | | | | | | | | | | | |
| LATVIA | 3623 | 7826 | 116.0 | 2603 | 4343 | 66.8 | 25099 | 48316 | 92.5 | 18087 | 28289 | 56.4 |
| U.S.A. | 7246 | 6956 | -4.0 | 3729 | 2778 | -25.5 | 7126 | 12987 | 82.2 | 6647 | 6103 | -8.2 |
| ESTONIA | 191 | 2981 | 1460.7 | 1336 | 2055 | 53.8 | 1151 | 13476 | 1070.8 | 5739 | 7972 | 38.9 |
| RUSSIA | 36 | 1349 | 3647.2 | 44 | 371 | 743.2 | 86 | 8279 | 9526.7 | 179 | 1992 | 1012.8 |
| CANADA | 772 | 674 | -12.7 | 496 | 39 | -92.1 | 497 | 518 | 4.2 | 623 | 45 | -92.8 |
| OTHER | 1589 | 2012 | 26.6 | 1209 | 971 | -19.7 | 12007 | 7527 | -37.3 | 4715 | 1906 | -59.6 |
| **TOTAL** | **13457** | **21798** | **62.0** | **9417** | **10557** | **12.1** | **45966** | **91103** | **98.2** | **35990** | **46307** | **28.7** |
| **Tropical sawn lumber** | | | | | | | | | | | | |
| MALAYSIA | 29827 | 27954 | -6.3 | 12828 | 13360 | 4.1 | 50439 | 50448 | 0.0 | 23091 | 27027 | 17.0 |
| CAMEROON | 20027 | 19310 | -3.6 | 9128 | 8100 | -11.3 | 32477 | 31183 | -4.0 | 14634 | 13483 | -7.9 |
| NETHERLANDS | 11851 | 13791 | 16.4 | 7292 | 5258 | -27.9 | 16503 | 19277 | 16.8 | 9938 | 7880 | -20.7 |
| IVORY COAST | 8560 | 11258 | 31.5 | 5183 | 5096 | -1.7 | 14594 | 19780 | 35.5 | 9168 | 8867 | -3.3 |
| GHANA | 9609 | 9784 | 1.8 | 5192 | 3794 | -26.9 | 18440 | 17792 | -3.5 | 9138 | 7543 | -17.5 |
| BRAZIL | 9790 | 8070 | -17.6 | 4691 | 3391 | -27.7 | 11048 | 13598 | 23.1 | 6300 | 13806 | 119.1 |
| GERMANY | 3855 | 5659 | 46.8 | 3237 | 2518 | -22.2 | 6124 | 9878 | 61.3 | 5963 | 4906 | -17.7 |
| INDONESIA | 4635 | 3502 | -24.4 | 2250 | 1546 | -31.3 | 5714 | 4786 | -16.2 | 3070 | 2448 | -20.3 |
| U.S.A. | 2292 | 3458 | 50.9 | 1385 | 2022 | 46.0 | 3403 | 4481 | 31.7 | 1876 | 2923 | 55.8 |
| BELGIUM | 2844 | 2746 | -3.4 | 1090 | 2108 | 93.4 | 4762 | 4968 | 4.3 | 1609 | 3450 | 114.4 |
| CONGO REPUBLIC | 1033 | 1797 | 74.0 | 1547 | 1801 | 16.4 | 1786 | 3125 | 75.0 | 2704 | 3042 | 12.5 |
| OTHER | 19965 | 11681 | -41.5 | 5089 | 5563 | 9.3 | 78103 | 25101 | -67.9 | 11745 | 19604 | 66.9 |
| **TOTAL** | **124288** | **119010** | **-4.2** | **58912** | **54557** | **-7.4** | **243393** | **204417** | **-16.0** | **99236** | **114979** | **15.9** |
| **Beech sawn lumber** | | | | | | | | | | | | |
| GERMANY | 16170 | 15057 | -6.9 | 8628 | 5975 | -30.7 | 21200 | 22808 | 7.6 | 11324 | 11879 | 4.9 |
| FRANCE | 2841 | 4647 | 63.6 | 1963 | 2835 | 44.4 | 2943 | 4134 | 40.5 | 1795 | 2487 | 38.6 |
| DENMARK | 2025 | 2411 | 19.1 | 728 | 1422 | 95.3 | 3478 | 2444 | -29.7 | 1025 | 2070 | 102.0 |
| ITALY | 1216 | 1339 | 10.1 | 884 | 439 | -50.3 | 1044 | 1223 | 17.1 | 756 | 446 | -41.0 |
| SERBIA & MONT. | 505 | 365 | -27.7 | 162 | 165 | 1.9 | 1160 | 864 | -25.5 | 374 | 437 | 16.8 |
| ROMANIA | 260 | 361 | 38.8 | 173 | 0 | -100.0 | 455 | 565 | 24.2 | 274 | 0 | -100.0 |
| POLAND | 123 | 306 | 148.8 | 67 | 363 | 441.8 | 147 | 245 | 66.7 | 76 | 361 | 375.0 |
| BELGIUM | 201 | 256 | 27.4 | 143 | 68 | -52.4 | 354 | 403 | 13.8 | 231 | 89 | -61.5 |
| SPAIN | 14 | 179 | 1178.6 | 132 | 0 | -100.0 | 16 | 186 | 1062.5 | 139 | 0 | -100.0 |
| OTHER | 956 | 985 | 3.0 | 269 | 340 | 26.4 | 1082 | 1110 | 2.6 | 254 | 449 | 76.8 |
| **TOTAL** | **24311** | **25906** | **6.6** | **13149** | **11607** | **-11.7** | **31879** | **33982** | **6.6** | **16248** | **18218** | **12.1** |
| **Oak sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 50070 | 43057 | -14.0 | 22129 | 18096 | -18.2 | 63039 | 61000 | -3.2 | 29595 | 26536 | -10.3 |
| FRANCE | 11808 | 9633 | -18.4 | 4964 | 6178 | 24.5 | 16235 | 22304 | 37.4 | 11271 | 10553 | -6.4 |
| ESTONIA (*see notes) | 5855 | 6353 | 8.5 | 3392 | 4424 | 30.4 | 32898 | 37607 | 14.3 | 16538 | 31233 | 88.9 |
| CANADA | 6873 | 6186 | -10.0 | 3481 | 1954 | -43.9 | 7082 | 6986 | -1.4 | 3833 | 2790 | -27.2 |
| GERMANY | 3260 | 4030 | 23.6 | 2159 | 2710 | 25.5 | 6734 | 5256 | -21.9 | 2725 | 4314 | 58.3 |
| ITALY | 1562 | 3402 | 117.8 | 1237 | 1548 | 25.1 | 1582 | 3725 | 135.5 | 1684 | 1313 | -22.0 |
| ROMANIA | 1430 | 1589 | 11.1 | 877 | 209 | -76.2 | 2475 | 3581 | 44.7 | 2009 | 345 | -82.8 |
| NETHERLANDS | 1144 | 1214 | 6.1 | 917 | 605 | -34.0 | 974 | 827 | -15.1 | 560 | 584 | 4.3 |
| LATVIA(*see notes) | 786 | 788 | 0.3 | 410 | 312 | -23.9 | 4953 | 4780 | -3.5 | 2432 | 1868 | -23.2 |
| OTHER | 3557 | 3112 | -12.5 | 1758 | 2334 | 32.8 | 5963 | 5324 | -10.7 | 2967 | 3198 | 7.8 |
| **TOTAL** | **86345** | **79364** | **-8.1** | **41324** | **38370** | **-7.1** | **141935** | **151390** | **6.7** | **73614** | **82734** | **12.4** |
| **Other hardwood sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 38219 | 31774 | -16.9 | 18455 | 13505 | -26.8 | 48645 | 42165 | -13.3 | 23617 | 19637 | -16.9 |
| LATVIA(*see notes) | 22461 | 20309 | -9.6 | 10494 | 11509 | 9.7 | 148821 | 134392 | -9.7 | 65687 | 79258 | 20.7 |
| CANADA | 13824 | 10761 | -22.2 | 6551 | 3865 | -41.0 | 14128 | 11485 | -18.7 | 6193 | 5357 | -13.5 |
| ESTONIA(*see notes) | 7571 | 5150 | -32.0 | 3124 | 1344 | -57.0 | 47875 | 29169 | -39.1 | 18400 | 8532 | -53.6 |
| SWEDEN | 2914 | 2205 | -24.3 | 1224 | 708 | -42.2 | 5121 | 4660 | -9.0 | 1699 | 4093 | 140.9 |
| LITHUANIA | 867 | 1355 | 56.3 | 678 | 477 | -29.6 | 5653 | 7830 | 38.5 | 3996 | 2677 | -33.0 |
| FINLAND | 1258 | 980 | -22.1 | 665 | 255 | -61.7 | 3042 | 4229 | 39.0 | 2387 | 1386 | -41.9 |
| DENMARK | 1316 | 932 | -29.2 | 802 | 157 | -80.4 | 830 | 1301 | 56.7 | 757 | 274 | -63.8 |
| OTHER | 5176 | 4806 | -7.1 | 2304 | 2470 | 7.2 | 12242 | 14996 | 22.5 | 7806 | 6954 | -10.9 |
| **TOTAL** | **93606** | **78272** | **-16.4** | **44297** | **34290** | **-22.6** | **286357** | **250227** | **-12.6** | **130542** | **128168** | **-1.8** |
| **Tropical hardwood veneer** | | | | | | | | | | | | |
| GERMANY | 1629 | 1503 | -7.7 | 664 | 480 | -27.7 | 1223 | 992 | -18.9 | 471 | 383 | -18.7 |
| SOUTH AFRICA | 5562 | 1497 | -73.1 | 951 | 3945 | 314.8 | 2026 | 380 | -81.2 | 265 | 1341 | 406.0 |
| FRANCE | 1540 | 1491 | -3.2 | 982 | 572 | -41.8 | 722 | 948 | 31.3 | 517 | 236 | -54.4 |
| GHANA | 1548 | 989 | -36.1 | 478 | 614 | 28.5 | 1582 | 1010 | -36.2 | 571 | 782 | 37.0 |
| THAILAND | 1350 | 688 | -49.0 | 293 | 631 | 115.4 | 379 | 186 | -50.9 | 126 | 294 | 133.3 |
| BELGIUM | 518 | 671 | 29.5 | 369 | 225 | -39.0 | 607 | 706 | 16.3 | 398 | 272 | -31.7 |
| OTHER | 4077 | 2263 | -44.5 | 1253 | 1811 | 44.5 | 2988 | 1775 | -40.6 | 814 | 2167 | 166.2 |
| **TOTAL** | **16224** | **9102** | **-43.9** | **4990** | **8278** | **65.9** | **9526** | **5997** | **-37.0** | **3161** | **5475** | **73.2** |
| **Other hardwood veneer** | | | | | | | | | | | | |
| GERMANY | 6752 | 7274 | 7.7 | 3211 | 2766 | -13.9 | 2141 | 5049 | 135.8 | 1971 | 1344 | -31.8 |
| BELGIUM | 4195 | 4704 | 12.1 | 2698 | 1490 | -44.8 | 1196 | 2492 | 108.4 | 1240 | 869 | -29.9 |
| FRANCE | 3142 | 4645 | 47.8 | 2606 | 2239 | -14.1 | 1508 | 4971 | 229.6 | 1543 | 2284 | 48.0 |
| U.S.A. | 8987 | 3510 | -60.9 | 1850 | 2395 | 29.5 | 5696 | 2457 | -56.9 | 1229 | 1346 | 9.5 |
| NETHERLANDS | 1907 | 3186 | 67.1 | 1598 | 1355 | -15.2 | 465 | 806 | 73.3 | 390 | 320 | -17.9 |
| CANADA | 1876 | 1076 | -42.6 | 629 | 683 | 8.6 | 734 | 533 | -27.4 | 306 | 458 | 49.7 |
| OTHER | 7682 | 4730 | -38.4 | 1740 | 2175 | 25.0 | 5107 | 7381 | 44.5 | 2577 | 3478 | 35.0 |
| **TOTAL** | **34541** | **29125** | **-15.7** | **14332** | **13103** | **-8.6** | **16846** | **23688** | **40.6** | **9255** | **10101** | **9.1** |

***The UK lacks significant domestic hardwood resources and processing capacity and so has always been a major importer. Traditionally much of the volume has been imported as rough sawn lumber, although globalisation trends in the manufacturing sector have increasingly favoured imports of further processed and finished product.***

The UK is only a minor buyer of tropical hardwood logs, usually importing no more than around 20,000 m3 per year for custom cutting to supply the high quality joinery and furniture sectors. Liberia has been the main source of the UK's tropical log imports in recent years. U.N. sanctions against Liberia have interupted this trade during 2003. Anecdotal reports indicate that the UK's largest importers took steps to build stocks of Liberian logs in advance of the sanctions, but imports during the first half of 2003 were down on the same period in 2002.

There has been a significant increase in U.K. oak log imports during the last two years, notably from France. Much of this will comprise structural timber for barn conversions and other renovation work. Some may also be destined for speciality cutting for high class joinery. But the oak log volumes seem very high, and may include some misclassified boules.

U.K. imports of tropical sawn lumber declined in both value and volume terms between 2001 and 2002. This year a new trend seems to have emerged. The value of imports has continued to decline while the volume of imports has risen. This suggests a shift in the nature of tropical hardwood imports - generally away from higher value species used for top-end joinery and furniture, towards lower value species for utility joinery and decking. This trend has been particularly marked for Brazilian hardwoods. While expensive Brazilian mahogany has not been available, Brazilian

# Hardwood imports - United Kingdom

shippers are exporting more decking timbers to the U.K.

U.K. imports of beech sawn lumber have been quite strong this year. Low demand elsewhere has meant European exporters have been offering beech at very competitive prices.

The value of U.K. imports of oak sawn lumber has fallen sharply this year, although volumes seem to have risen. This may be partly due to the fall in imports of relatively expensive product from North America at a time when imports of cheaper European oak have been rising. But again the data may be inaccurate, particularly the large volume of oak lumber recorded as imported from Estonia.

The trend towards increased U.K. imports of further processed timber and semi-finished components is evident from the data on "planed, sanded, or finger-jointed lumber" and on "hardwood profiles", which includes a variety of machined products. Italy, Canada, Malaysia and Indonesia are major suppliers of these products to the U.K.

U.K. imports of tropical hardwood plywood were strong during the first half 2003. But there are signs that Indonesian suppliers are beginning to lose their grip on the U.K. market. During the opening six months of this year, U.K. imports of hardwood plywood from Brazil nearly matched those from Indonesia. Malaysia has also clawed back market share this year, while China is playing an increasingly important role. In response to environmental concerns, some of the U.K.'s largest plywood importers have now withdrawn from the Indonesian plywood business.

U.K. imports of doors have been rising significantly, notably from South Africa. Wood furniture imports have also continued to rise this year, but at a slower pace than last year. UK furniture imports have grown strongly from Poland, and declined sharply from Belgium.

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical hardwood plywood** | | | | | | | | | | | | |
| INDONESIA | 97396 | 74767 | -23.2 | 28317 | 29692 | 4.9 | 253160 | 210077 | -17.0 | 79596 | 86497 | 8.7 |
| BRAZIL | 55769 | 60851 | 9.1 | 22105 | 21610 | -2.2 | 200901 | 209289 | 4.2 | 82395 | 84742 | 2.8 |
| MALAYSIA | 32322 | 23735 | -26.6 | 9492 | 13112 | 38.1 | 85686 | 65689 | -23.3 | 27028 | 38044 | 40.8 |
| CHINA | 4755 | 6212 | 30.6 | 839 | 6288 | 649.5 | 12099 | 18626 | 53.9 | 1827 | 22674 | 1141.1 |
| BELGIUM | 4593 | 4347 | -5.4 | 2854 | 788 | -72.4 | 7764 | 7777 | 0.2 | 4895 | 1733 | -64.6 |
| SPAIN | 2649 | 3521 | 32.9 | 1962 | 1860 | -5.2 | 3470 | 6756 | 94.7 | 2941 | 4104 | 39.5 |
| OTHER | 20351 | 16945 | -16.7 | 9826 | 7411 | -24.6 | 46957 | 39491 | -15.9 | 21946 | 19005 | -13.4 |
| **TOTAL** | **217835** | **190378** | **-12.6** | **75395** | **80761** | **7.1** | **610038** | **557705** | **-8.6** | **220628** | **256799** | **16.4** |
| **Other hardwood plywood** | | | | | | | | | | | | |
| FINLAND | 30468 | 27196 | -10.7 | 12377 | 14381 | 16.2 | 46450 | 42715 | -8.0 | 16931 | 20002 | 18.1 |
| GERMANY | 32068 | 20318 | -36.6 | 10054 | 1043 | -89.6 | 47211 | 50503 | 7.0 | 26822 | 2272 | -91.5 |
| RUSSIA | 13685 | 13055 | -4.6 | 5730 | 6460 | 12.7 | 45116 | 43106 | -4.5 | 17214 | 23877 | 38.7 |
| LATVIA | 7090 | 7691 | 8.5 | 4567 | 3061 | -33.0 | 13687 | 15825 | 15.6 | 9381 | 8086 | -13.8 |
| ITALY | 2543 | 3759 | 47.8 | 1635 | 1451 | -11.3 | 3901 | 6877 | 76.3 | 2905 | 2413 | -16.9 |
| LITHUANIA | 4212 | 3303 | -21.6 | 1628 | 911 | -44.0 | 14183 | 11238 | -20.8 | 5348 | 3499 | -34.6 |
| OTHER | 12224 | 13640 | 11.6 | 6111 | 8213 | 34.4 | 24731 | 24884 | 0.6 | 10083 | 16566 | 64.3 |
| **TOTAL** | **102290** | **88962** | **-13.0** | **42102** | **35520** | **-15.6** | **195279** | **195149** | **-0.1** | **88684** | **76714** | **-13.5** |
| **Sleepers** | | | | | | | | | | | | |
| GERMANY | 1254 | 2673 | 113.2 | 1190 | 813 | -31.7 | 12249 | 23925 | 95.3 | 12478 | 11032 | -11.6 |
| NETHERLANDS | 2202 | 1852 | -15.9 | 714 | 779 | 9.1 | 24884 | 21747 | -12.6 | 8666 | 8462 | -2.4 |
| U.S.A. | 431 | 886 | 105.6 | 544 | 113 | -79.2 | 969 | 1964 | 102.7 | 1217 | 275 | -77.4 |
| FRANCE | 1226 | 836 | -31.8 | 67 | 620 | 825.4 | 8935 | 4844 | -45.8 | 562 | 4276 | 660.9 |
| OTHER | 5850 | 2526 | -56.8 | 1474 | 1076 | -27.0 | 34817 | 13846 | -60.2 | 6697 | 9518 | 42.1 |
| **TOTAL** | **10963** | **8773** | **-20.0** | **3989** | **3401** | **-14.7** | **81854** | **66326** | **-19.0** | **29620** | **33563** | **13.3** |

| | Value (1000s euros) | | | | | | Weight (tonnes) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Planed, sanded and finger-jointed hardwood** | | | | | | | | | | | | |
| LATVIA(*see notes) | 3496 | 10275 | 193.9 | 4561 | 6737 | 47.7 | 1581 | 33230 | 2001.8 | 15773 | 17863 | 13.3 |
| U.S.A. | 1445 | 3767 | 160.7 | 2288 | 1405 | -38.6 | 1263 | 1386 | 9.7 | 782 | 904 | 15.6 |
| NETHERLANDS | 1053 | 2490 | 136.5 | 1002 | 1052 | 5.0 | 715 | 648 | -9.4 | 658 | 532 | -19.1 |
| FRANCE | 983 | 2329 | 136.9 | 545 | 1006 | 84.6 | 1375 | 1398 | 1.7 | 367 | 564 | 53.7 |
| GERMANY | 838 | 890 | 6.2 | 540 | 299 | -44.6 | 1086 | 979 | -9.9 | 998 | 593 | -40.6 |
| OTHER | 2006 | 4470 | 122.8 | 1963 | 2309 | 17.6 | 2424 | 6750 | 178.5 | 2595 | 2973 | 14.6 |
| **TOTAL** | **9821** | **24221** | **146.6** | **10899** | **12808** | **17.5** | **8444** | **44391** | **425.7** | **21173** | **23429** | **10.7** |
| **Hardwood profiles** | | | | | | | | | | | | |
| ITALY | 20763 | 21079 | 1.5 | 10915 | 11370 | 4.2 | 3800 | 3720 | -2.1 | 1932 | 2118 | 9.6 |
| CANADA | 17745 | 20240 | 14.1 | 10793 | 9365 | -13.2 | 9289 | 10790 | 16.2 | 5757 | 5747 | -0.2 |
| MALAYSIA | 12586 | 12847 | 2.1 | 6449 | 4360 | -32.4 | 8306 | 8665 | 4.3 | 3890 | 3185 | -18.1 |
| INDONESIA | 10070 | 12790 | 27.0 | 5490 | 6776 | 23.4 | 6441 | 8537 | 32.5 | 3886 | 4769 | 22.7 |
| OTHER | 55044 | 67279 | 22.2 | 29077 | 34978 | 20.3 | 25159 | 70380 | 179.7 | 14239 | 23377 | 64.2 |
| **TOTAL** | **116208** | **134235** | **15.5** | **62724** | **66849** | **6.6** | **52995** | **102092** | **92.6** | **29704** | **39196** | **32.0** |
| **Planed hardwood veneers** | | | | | | | | | | | | |
| U.S.A. | 1055 | 1124 | 6.5 | 673 | 1142 | 69.7 | 317 | 407 | 28.4 | 46 | 45 | -2.2 |
| SPAIN | 882 | 948 | 7.5 | 605 | 662 | 9.4 | 197 | 50 | -74.6 | 210 | 256 | 21.9 |
| OTHER | 936 | 410 | -56.2 | 260 | 604 | 132.3 | 268 | 56 | -79.1 | 38 | 108 | 184.2 |
| **TOTAL** | **2873** | **2482** | **-13.6** | **1538** | **2408** | **56.6** | **782** | **513** | **-34.4** | **294** | **409** | **39.1** |
| **Windows and their frames** | | | | | | | | | | | | |
| DENMARK | 22427 | 25712 | 14.6 | 10271 | 15705 | 52.9 | 4830 | 5405 | 11.9 | 1934 | 3455 | 78.6 |
| NORWAY | 19815 | 22964 | 15.9 | 10652 | 10858 | 1.9 | 2710 | 3037 | 12.1 | 1422 | 1818 | 27.8 |
| SWEDEN | 4973 | 5568 | 12.0 | 3138 | 2621 | -16.5 | 868 | 958 | 10.4 | 543 | 624 | 14.9 |
| FRANCE | 36 | 3905 | 10747.2 | 2034 | 1606 | -21.0 | 7 | 996 | 14128.6 | 550 | 458 | -16.7 |
| OTHER | 8213 | 10662 | 29.8 | 5000 | 5036 | 0.7 | 5156 | 2854 | -44.6 | 1427 | 1725 | 20.9 |
| **TOTAL** | **55464** | **68811** | **24.1** | **31095** | **35826** | **15.2** | **13571** | **13250** | **-2.4** | **5876** | **8080** | **37.5** |
| **Doors and their frames** | | | | | | | | | | | | |
| SOUTH AFRICA | 40035 | 47395 | 18.4 | 24343 | 22113 | -9.2 | 22920 | 28631 | 24.9 | 14553 | 15397 | 5.8 |
| INDONESIA | 39917 | 41823 | 4.8 | 20524 | 18031 | -12.1 | 23072 | 23553 | 2.1 | 10582 | 11909 | 12.5 |
| ITALY | 23657 | 30710 | 29.8 | 11623 | 15022 | 29.2 | 5096 | 7882 | 54.7 | 2285 | 4369 | 91.2 |
| MALAYSIA | 20372 | 23230 | 14.0 | 11436 | 10908 | -4.6 | 8705 | 11141 | 28.0 | 5347 | 6564 | 22.8 |
| OTHER | 110118 | 130822 | 18.8 | 63691 | 61205 | -3.9 | 60679 | 68111 | 12.2 | 34404 | 38732 | 12.6 |
| **TOTAL** | **234099** | **273980** | **17.0** | **131617** | **127279** | **-3.3** | **120472** | **139318** | **15.6** | **67171** | **76971** | **14.6** |
| **Parquet panels** | | | | | | | | | | | | |
| SWEDEN | 16945 | 25848 | 52.5 | 12416 | 12558 | 1.1 | 5293 | 9807 | 85.3 | 4461 | 5095 | 14.2 |
| DENMARK | 17370 | 16598 | -4.4 | 9279 | 7683 | -17.2 | 5986 | 5377 | -10.2 | 2972 | 2627 | -11.6 |
| BELGIUM | 33345 | 10133 | -69.6 | 4978 | 3415 | -31.4 | 18659 | 3294 | -82.3 | 1136 | 2023 | 78.1 |
| CHINA | 3682 | 8402 | 128.2 | 3949 | 4135 | 4.7 | 1860 | 4583 | 146.4 | 2077 | 2538 | 22.2 |
| OTHER | 46651 | 47024 | 0.8 | 20958 | 19788 | -5.6 | 21447 | 25530 | 19.0 | 12307 | 10452 | -15.1 |
| **TOTAL** | **117993** | **108005** | **-8.5** | **51580** | **47579** | **-7.8** | **53245** | **48591** | **-8.7** | **22953** | **22735** | **-0.9** |
| **Wooden furniture** | | | | | | | | | | | | |
| ITALY | 532350 | 671053 | 26.1 | 324604 | 352856 | 8.7 | 118401 | 161964 | 36.8 | 91809 | 73636 | -19.8 |
| CHINA | 172703 | 256359 | 48.4 | 131378 | 143819 | 9.5 | 65144 | 96042 | 47.4 | 52427 | 54293 | 3.6 |
| GERMANY | 128230 | 163801 | 27.7 | 78819 | 80195 | 1.7 | 37600 | 57061 | 51.8 | 26046 | 40510 | 55.5 |
| POLAND | 120221 | 148660 | 23.7 | 73671 | 81081 | 10.1 | 51960 | 64915 | 24.9 | 31916 | 40182 | 25.9 |
| DENMARK | 125050 | 136240 | 8.9 | 72121 | 69596 | -3.5 | 39292 | 51533 | 31.2 | 26818 | 25554 | -4.7 |
| MALAYSIA | 120959 | 126982 | 5.0 | 72015 | 71442 | -0.8 | 50342 | 57585 | 14.4 | 32124 | 34374 | 7.0 |
| BELGIUM | 105258 | 95319 | -9.4 | 53058 | 38265 | -27.9 | 16185 | 14451 | -10.7 | 7722 | 6651 | -13.9 |
| INDONESIA | 90496 | 86503 | -4.4 | 53261 | 42735 | -19.8 | 25991 | 26816 | 3.2 | 15533 | 14981 | -3.6 |
| OTHER | 866424 | 955328 | 10.3 | 498009 | 481382 | -3.3 | 298670 | 357356 | 19.6 | 186159 | 200711 | 7.8 |
| **TOTAL** | **2261691** | **2640245** | **16.7** | **1356936** | **1361371** | **0.3** | **703585** | **887723** | **26.2** | **470554** | **490892** | **4.3** |

*Data sources: data is derived from data supplied by BTS Ltd drawn from Eurostat. Value and weight data is provided as supplied by BTS. Due to numerous errors in the Eurostat volume data, data provided here is estimated where necessary from weight data. For breakdown of harmonised system (HS) codes used to prepare these tables see page 15.*

**U.K. hardwood trade data supplied by Customs and Excise and Eurostat contains numerous errors. Of these, the most persistent is the reporting of significant imports from Latvia and Estonia of "other hardwood" sawn lumber - some of which is even recorded as "tropical" - and of "oak sawn lumber" from Estonia. It is suspected that much of this volume comprises softwoods, although it is possible some of the volume comprises birch.*

# Hardwood imports - France

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical logs** | | | | | | | | | | | | |
| GABON | 106607 | 82953 | -22.2 | 44050 | 36724 | -16.6 | 469474 | 372599 | -20.6 | 198223 | 170128 | -14.2 |
| LIBERIA | 29582 | 30525 | 3.2 | 16489 | 17658 | 7.1 | 110207 | 116414 | 5.6 | 60991 | 71580 | 17.4 |
| CONGO REPUBLIC | 10873 | 17853 | 64.2 | 8410 | 8979 | 6.8 | 33866 | 61866 | 82.7 | 28518 | 31401 | 10.1 |
| CAMEROON | 14273 | 9340 | -34.6 | 4889 | 3320 | -32.1 | 52448 | 34227 | -34.7 | 18615 | 12271 | -34.1 |
| EQUAT. GUINEA | 9406 | 5294 | -43.7 | 3328 | 3358 | 0.9 | 48992 | 27967 | -42.9 | 15031 | 19400 | 29.1 |
| CENT. AFR. REP. | 3858 | 3815 | -1.1 | 998 | 2097 | 110.1 | 11894 | 12239 | 2.9 | 3215 | 6540 | 103.4 |
| OTHER | 8238 | 7656 | -7.1 | 3333 | 3913 | 17.4 | 23675 | 17173 | -27.5 | 7645 | 8762 | 14.6 |
| **TOTAL** | **182837** | **157436** | **-13.9** | **81497** | **76049** | **-6.7** | **750556** | **642485** | **-14.4** | **332238** | **320082** | **-3.7** |
| **Beech logs** | | | | | | | | | | | | |
| BELGIUM | 872 | 1728 | 98.2 | 1081 | 1748 | 61.7 | 6565 | 38503 | 486.5 | 16012 | 44105 | 175.4 |
| GERMANY | 2512 | 1416 | -43.6 | 1216 | 1084 | -10.9 | 32792 | 14700 | -55.2 | 12340 | 17954 | 45.5 |
| SPAIN | 771 | 720 | -6.6 | 418 | 295 | -29.4 | 41523 | 42261 | 1.8 | 24245 | 17739 | -26.8 |
| SWITZERLAND | 627 | 411 | -34.4 | 395 | 470 | 19.0 | 7711 | 4423 | -42.6 | 4177 | 5110 | 22.3 |
| LUXEMBOURG | 36 | 343 | 852.8 | 263 | 262 | -0.4 | 218 | 7225 | 3214.2 | 4760 | 8514 | 78.9 |
| OTHER | 341 | 303 | -11.1 | 248 | 17 | -93.1 | 1338 | 1402 | 4.8 | 1274 | 83 | -93.5 |
| **TOTAL** | **5159** | **4921** | **-4.6** | **3621** | **3876** | **7.0** | **90147** | **108514** | **20.4** | **62808** | **93505** | **48.9** |
| **Oak logs** | | | | | | | | | | | | |
| GERMANY | 10793 | 8700 | -19.4 | 5734 | 9769 | 70.4 | 71233 | 47430 | -33.4 | 30224 | 52765 | 74.6 |
| AUSTRIA | 1327 | 977 | -26.4 | 552 | 660 | 19.6 | 4577 | 3202 | -30.0 | 1928 | 1753 | -9.1 |
| BELGIUM | 1690 | 924 | -45.3 | 587 | 546 | -7.0 | 8937 | 8727 | -2.3 | 5701 | 6420 | 12.6 |
| U.S.A. | 1587 | 717 | -54.8 | 525 | 356 | -32.2 | 2659 | 1228 | -53.8 | 853 | 610 | -28.5 |
| LUXEMBOURG | 273 | 523 | 91.6 | 90 | 255 | 183.3 | 1085 | 1915 | 76.5 | 460 | 1591 | 245.9 |
| OTHER | 2796 | 1678 | -40.0 | 1088 | 1817 | 67.0 | 23180 | 16186 | -30.2 | 10323 | 7589 | -26.5 |
| **TOTAL** | **18466** | **13519** | **-26.8** | **8576** | **13403** | **56.3** | **111671** | **78688** | **-29.5** | **49489** | **70728** | **42.9** |
| **Other hardwood logs** | | | | | | | | | | | | |
| U.S.A. | 8699 | 6171 | -29.1 | 4142 | 2617 | -36.8 | 15317 | 10082 | -34.2 | 9103 | 4267 | -53.1 |
| BELGIUM | 5089 | 5307 | 4.3 | 2902 | 2781 | -4.2 | 78556 | 80573 | 2.6 | 41262 | 47775 | 15.8 |
| SPAIN | 3181 | 2131 | -33.0 | 979 | 979 | 0.0 | 139752 | 124580 | -10.9 | 65839 | 65518 | -0.5 |
| CANADA | 1999 | 1878 | -6.1 | 1511 | 546 | -63.9 | 2975 | 2662 | -10.5 | 1755 | 1286 | -26.7 |
| GERMANY | 2491 | 1760 | -29.3 | 1015 | 3645 | 259.1 | 20433 | 20553 | 0.6 | 11023 | 11361 | 3.1 |
| OTHER | 2653 | 1687 | -36.4 | 1180 | 743 | -37.0 | 9216 | 7058 | -23.4 | 5522 | 4256 | -22.9 |
| **TOTAL** | **24112** | **18934** | **-21.5** | **11729** | **11311** | **-3.6** | **266249** | **245508** | **-7.8** | **134504** | **134463** | **0.0** |
| **Tropical sawn lumber** | | | | | | | | | | | | |
| BRAZIL | 73286 | 47457 | -35.2 | 25500 | 26257 | 3.0 | 162996 | 104079 | -36.1 | 53700 | 66085 | 23.1 |
| CAMEROON | 39593 | 26738 | -32.5 | 14470 | 12635 | -12.7 | 73548 | 51925 | -29.4 | 28197 | 24324 | -13.7 |
| IVORY COAST | 15127 | 11688 | -22.7 | 6762 | 3628 | -46.3 | 32130 | 24240 | -24.6 | 13980 | 7913 | -43.4 |
| BELGIUM | 13568 | 11683 | -13.9 | 6375 | 5058 | -20.7 | 29452 | 24692 | -16.2 | 12743 | 11878 | -6.8 |
| MALAYSIA | 17443 | 9813 | -43.7 | 4651 | 4733 | 1.8 | 35169 | 19904 | -43.4 | 8898 | 10291 | 15.7 |
| CONGO REPUBLIC | 5399 | 6463 | 19.7 | 3103 | 3338 | 7.6 | 10906 | 12438 | 14.0 | 5893 | 6451 | 9.5 |
| GABON | 3992 | 6357 | 59.2 | 3041 | 3918 | 28.8 | 8634 | 13367 | 54.8 | 6122 | 8903 | 45.4 |
| GHANA | 11220 | 6045 | -46.1 | 3691 | 2352 | -36.3 | 19352 | 14731 | -23.9 | 6527 | 5956 | -8.7 |
| INDONESIA | 2608 | 1924 | -26.2 | 850 | 1589 | 86.9 | 4122 | 3118 | -24.4 | 1434 | 2438 | 70.0 |
| LIBERIA | 2587 | 1792 | -30.7 | 1045 | 1212 | 16.0 | 5312 | 3926 | -26.1 | 2246 | 2828 | 25.9 |
| NETHERLANDS | 1542 | 1444 | -6.4 | 943 | 789 | -16.3 | 2386 | 2265 | -5.1 | 1396 | 1329 | -4.8 |
| OTHER | 9614 | 6197 | -35.5 | 3686 | 3307 | -10.3 | 18115 | 8035 | -55.6 | 4525 | 6079 | 34.3 |
| **TOTAL** | **195979** | **137601** | **-29.8** | **74117** | **68816** | **-7.2** | **402122** | **282720** | **-29.7** | **145661** | **154475** | **6.1** |
| **Beech sawn lumber** | | | | | | | | | | | | |
| SLOVAKIA | 1174 | 1583 | 34.8 | 1172 | 658 | -43.9 | 4926 | 3644 | -26.0 | 2546 | 1669 | -34.4 |
| SPAIN | 1294 | 1377 | 6.4 | 1009 | 638 | -36.8 | 1345 | 1392 | 3.5 | 913 | 864 | -5.4 |
| SWITZERLAND | 954 | 1057 | 10.8 | 531 | 435 | -18.1 | 3485 | 3958 | 13.6 | 1974 | 1561 | -20.9 |
| ROMANIA | 648 | 900 | 38.9 | 286 | 478 | 67.1 | 1362 | 1808 | 32.7 | 569 | 992 | 74.3 |
| SLOVENIA | 724 | 860 | 18.8 | 553 | 507 | -8.3 | 597 | 902 | 51.1 | 525 | 767 | 46.1 |
| GERMANY | 549 | 711 | 29.5 | 479 | 230 | -52.0 | 848 | 2504 | 195.3 | 1772 | 582 | -67.2 |
| POLAND | 1355 | 609 | -55.1 | 290 | 242 | -16.6 | 2158 | 748 | -65.3 | 594 | 363 | -38.9 |
| ITALY | 765 | 546 | -28.6 | 258 | 220 | -14.7 | 1819 | 2025 | 11.3 | 1075 | 825 | -23.3 |
| BELGIUM | 312 | 488 | 56.4 | 280 | 214 | -23.6 | 1296 | 2551 | 96.8 | 1609 | 1244 | -22.7 |
| OTHER | 1908 | 968 | -49.3 | 651 | 678 | 4.1 | 4647 | 2391 | -48.5 | 2024 | 1661 | -17.9 |
| **TOTAL** | **9683** | **9099** | **-6.0** | **5509** | **4300** | **-21.9** | **22483** | **21923** | **-2.5** | **13601** | **10528** | **-22.6** |
| **Oak sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 10888 | 9315 | -14.4 | 5917 | 3913 | -33.9 | 14114 | 13162 | -6.7 | 8014 | 6472 | -19.2 |
| BELGIUM | 3402 | 3002 | -11.8 | 1697 | 1715 | 1.1 | 6514 | 7707 | 18.3 | 3109 | 3450 | 11.0 |
| UKRAINE | 1975 | 2430 | 23.0 | 1171 | 1135 | -3.1 | 3460 | 3308 | -4.4 | 1586 | 1780 | 12.2 |
| CANADA | 2485 | 1805 | -27.4 | 1242 | 853 | -31.3 | 3138 | 2157 | -31.3 | 1417 | 1156 | -18.4 |
| ROMANIA | 1471 | 1575 | 7.1 | 841 | 674 | -19.9 | 1719 | 1357 | -21.1 | 780 | 725 | -7.1 |
| GERMANY | 1547 | 1299 | -16.0 | 836 | 635 | -24.0 | 4815 | 5212 | 8.2 | 2300 | 1836 | -20.2 |
| ITALY | 1098 | 1282 | 16.8 | 668 | 1079 | 61.5 | 1761 | 483 | -72.6 | 220 | 568 | 158.2 |
| SLOVAKIA | 1097 | 852 | -22.3 | 424 | 330 | -22.2 | 2165 | 1282 | -40.8 | 717 | 619 | -13.7 |
| POLAND | 718 | 712 | -0.8 | 349 | 271 | -22.3 | 608 | 634 | 4.3 | 312 | 312 | 0.0 |
| OTHER | 5693 | 3438 | -39.6 | 2245 | 1426 | -36.5 | 8562 | 5438 | -36.5 | 3313 | 2766 | -16.5 |
| **TOTAL** | **30374** | **25710** | **-15.4** | **15390** | **12031** | **-21.8** | **46856** | **40740** | **-13.1** | **21768** | **19684** | **-9.6** |
| **Other hardwood sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 13764 | 9337 | -32.2 | 5312 | 4186 | -21.2 | 18459 | 13089 | -29.1 | 7307 | 6392 | -12.5 |
| CANADA | 7954 | 5085 | -36.1 | 3054 | 2193 | -28.2 | 9909 | 8938 | -9.8 | 4219 | 3592 | -14.9 |
| BELGIUM | 2899 | 3359 | 15.9 | 1740 | 1455 | -16.4 | 5546 | 7936 | 43.1 | 4212 | 4787 | 13.7 |
| GERMANY | 2239 | 2190 | -2.2 | 1197 | 1191 | -0.5 | 28952 | 10071 | -65.2 | 6631 | 6648 | 0.3 |
| ROMANIA | 1675 | 1743 | 4.1 | 1048 | 529 | -49.5 | 2550 | 2022 | -20.7 | 1215 | 1263 | 4.0 |
| HUNGARY | 1245 | 1614 | 29.6 | 852 | 1230 | 44.4 | 6209 | 9764 | 57.3 | 4020 | 5567 | 38.5 |
| LATVIA | 1868 | 1232 | -34.0 | 567 | 1030 | 81.7 | 14336 | 9777 | -31.8 | 4623 | 8544 | 84.8 |
| NETHERLANDS | 740 | 1179 | 59.3 | 510 | 507 | -0.6 | 863 | 1974 | 128.7 | 868 | 994 | 14.5 |
| OTHER | 7376 | 6708 | -9.1 | 3318 | 3669 | 10.6 | 25156 | 26881 | 6.9 | 13073 | 15090 | 15.4 |
| **TOTAL** | **39760** | **32447** | **-18.4** | **17598** | **15990** | **-9.1** | **111980** | **90452** | **-19.2** | **46168** | **52877** | **14.5** |
| **Tropical hardwood veneer** | | | | | | | | | | | | |
| GABON | 24216 | 36543 | 50.9 | 16821 | 18562 | 10.4 | 53101 | 87126 | 64.1 | 39473 | 46012 | 16.6 |
| GHANA | 3791 | 4225 | 11.4 | 2243 | 1942 | -13.4 | 3976 | 3863 | -2.8 | 1385 | 1355 | -2.2 |
| BELGIUM | 2106 | 2546 | 20.9 | 1313 | 1356 | 3.3 | 2841 | 4678 | 64.7 | 2519 | 1953 | -22.5 |
| IVORY COAST | 1886 | 1702 | -9.8 | 936 | 839 | -10.4 | 3834 | 3548 | -7.5 | 2076 | 2039 | -1.8 |
| EQUAT. GUINEA | 1589 | 1668 | 5.0 | 676 | 1980 | 192.9 | 2760 | 2463 | -10.8 | 885 | 3672 | 314.9 |
| SPAIN | 1911 | 1479 | -22.6 | 973 | 1034 | 6.3 | 2870 | 2250 | -21.6 | 1292 | 1916 | 48.3 |
| OTHER | 8310 | 7514 | -9.6 | 4822 | 2227 | -53.8 | 10024 | 6575 | -34.4 | 4389 | 2056 | -53.2 |
| **TOTAL** | **43809** | **55677** | **27.1** | **27784** | **27940** | **0.6** | **79406** | **110503** | **39.2** | **52019** | **59003** | **13.4** |
| **Other hardwood veneer** | | | | | | | | | | | | |
| GERMANY | 7378 | 6397 | -13.3 | 3510 | 3033 | -13.6 | 4731 | 3507 | -25.9 | 1958 | 1877 | -4.1 |
| U.S.A. | 4707 | 4160 | -11.6 | 2670 | 1755 | -34.3 | 1912 | 2197 | 14.9 | 1178 | 1841 | 56.3 |
| ITALY | 6168 | 3329 | -46.0 | 1902 | 2313 | 21.6 | 2173 | 3068 | 41.2 | 1376 | 1071 | -22.2 |
| SPAIN | 5278 | 3198 | -39.4 | 2485 | 1914 | -23.0 | 2948 | 905 | -69.3 | 584 | 965 | 65.2 |
| BELGIUM | 2595 | 2029 | -21.8 | 814 | 1315 | 61.5 | 2647 | 2886 | 9.0 | 1067 | 1435 | 34.5 |
| AUSTRIA | 1385 | 1133 | -18.2 | 593 | 443 | -25.3 | 1154 | 583 | -49.5 | 329 | 171 | -48.0 |
| OTHER | 3428 | 4268 | 24.5 | 2341 | 3991 | 70.5 | 6105 | 8994 | 47.3 | 4052 | 5351 | 32.1 |
| **TOTAL** | **30939** | **24514** | **-20.8** | **14315** | **14764** | **3.1** | **21671** | **22139** | **2.2** | **10545** | **12712** | **20.6** |

***At well over 600,000 m3 a year, French imports of tropical hardwood logs are still significant. But they have been declining in recent years.*** Imports from Gabon and Cameroon have been falling most rapidly, only partly compensated by rising imports from the Congo Republic, Equatorial Guinea and the Central African Republic. The decline reflects lack of log availability, competition from Asian plywood manufacturers both for raw material and in finished goods markets, and a general shift in tropical log processing facilities to supplier countries. French okoume plywood has come under intense competitive pressure from Chinese manufacturers, and production has been falling.

During the first six months there was a strong rise in French log imports from Liberia, probably due to French importers building stocks of niangon in anticipation of the UN trade ban and as the political situation deteriorated.

The general decline in French imports of tropical logs has not been offset by any significant rise in imports of tropical sawn lumber. In fact, there was a steep fall in French tropical sawn lumber imports last year. This decline has been only partially reversed during the first 6 months of 2003.

During 2002, there was a particularly sharp fall in French imports of sawn lumber from Brazil. But this year, imports of Brazilian sawn lumber have been recovering. A significant portion of French imports of Brazilian hardwood comprise light timbers, such as tauari and curopixa, which are purchased by the large joinery manufacturing companies. For African sawn lumber, French imports have fallen away from Ivory Coast and Cameroon, but are tending to rise from Gabon as interest in okoume lumber in increasing.

French imports of temperate hardwood logs were strong during the first half of 2003. This is

# Hardwood imports - France

to partly compensate for declining French harvests as efforts are made to allow the forest to recover from the December 1999 storms. French hardwood saw log harvests declined from 7.6 million m3 in 2001, to only 6 million m3 in 2002. They are expected to remain stable at this level in 2003.

Judging from the value data, a significant proportion of French temperate hardwood log imports comprise low quality industrial roundwood. However, shortages of domestic suppliers have meant that larger volumes of higher quality logs are also being imported from Germany and other EU countries for casks, sawn lumber and veneers. Imports of good quality veneer and saw logs from North America have fallen sharply over the last 18 months.

French imports of tropical veneer have been rising, mainly due to a shift away from imports of logs in favour of rotary veneer from Gabon.

After a poor year last year, there was a partial rebound in French imports of temperate hardwood veneer this year. However there seems to have been a shift to lower value material, perhaps indicative of cost-saving in the furniture industry.

French imports of hardwood plywood have been rising during 2003, indicative of the growing pressure on domestic producers and a partial shift in French manufacturing capacity to Gabon. France seems to be importing greater volumes of tropical hardwood plywood through Belgium and Germany over the last 18 months, rather than direct. This may be indicative greater reliance on large concentration yards and just-in-time purchasing in this sector.

The wider European trend to increase imports of further processed products at the expense of primary products is evident in France, but to a lesser extent than in other E.U. countries.

Official French economic data for the second quarter of 2003 was weaker than expected, forcing analysts to revise GDP growth figures downwards. For example, the Economist Intelligence Unit (EIU) revised its forecast for real GDP growth during 2003 down from 0.7% to 0.4%. However EIU expect GDP growth pick up to 1.7% in 2004, boosted by improvements in the global economy, the low base interest rate in the euro-zone (now at 2%), continued government spending, and tax cuts due to implemented from 2004.

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical hardwood plywood** | | | | | | | | | | | | |
| INDONESIA | 23859 | 19559 | -18.0 | 10975 | 10494 | -4.4 | 69065 | 58575 | -15.2 | 30357 | 29080 | -4.2 |
| BELGIUM | 14076 | 11983 | -14.9 | 6147 | 5803 | -5.6 | 29835 | 25865 | -13.3 | 13126 | 22901 | 74.5 |
| GABON | 5919 | 6091 | 2.9 | 3179 | 3485 | 9.6 | 12072 | 12393 | 2.7 | 6377 | 6886 | 8.0 |
| GERMANY | 2663 | 5733 | 115.3 | 3095 | 3467 | 12.0 | 4709 | 7753 | 64.6 | 5492 | 4783 | -12.9 |
| BRAZIL | 6925 | 5201 | -24.9 | 2028 | 3068 | 51.3 | 20145 | 15626 | -22.4 | 5573 | 9935 | 78.3 |
| IVORY COAST | 5592 | 4930 | -11.8 | 2393 | 2648 | 10.7 | 12930 | 11076 | -14.3 | 5456 | 6469 | 18.6 |
| OTHER | 13922 | 12611 | -9.4 | 6336 | 7020 | 10.8 | 33399 | 30767 | -7.9 | 14617 | 17143 | 17.3 |
| **TOTAL** | **72956** | **66108** | **-9.4** | **34153** | **35985** | **5.4** | **182156** | **162055** | **-11.0** | **80998** | **97198** | **20.0** |
| **Other hardwood plywood** | | | | | | | | | | | | |
| FINLAND | 17522 | 18946 | 8.1 | 9825 | 9050 | -7.9 | 26089 | 30531 | 17.0 | 16599 | 15647 | -5.7 |
| BELGIUM | 6567 | 8870 | 35.1 | 4925 | 5390 | 9.4 | 13292 | 17052 | 28.3 | 10682 | 11266 | 5.5 |
| GERMANY | 6374 | 8845 | 38.8 | 4663 | 4732 | 1.5 | 9860 | 12813 | 29.9 | 6357 | 7024 | 10.5 |
| ITALY | 4636 | 3336 | -28.0 | 1733 | 2158 | 24.5 | 7371 | 4668 | -36.7 | 2384 | 2970 | 24.6 |
| RUSSIA | 2633 | 1884 | -28.4 | 887 | 969 | 9.2 | 8685 | 5190 | -40.2 | 2432 | 2778 | 14.2 |
| LATVIA | 1424 | 1825 | 28.2 | 981 | 1471 | 49.9 | 2189 | 3073 | 40.4 | 1778 | 2290 | 28.8 |
| OTHER | 11051 | 8325 | -24.7 | 4757 | 5594 | 17.6 | 20407 | 19357 | -5.1 | 10033 | 11858 | 18.2 |
| **TOTAL** | **50207** | **52031** | **3.6** | **27771** | **29364** | **5.7** | **87893** | **92684** | **5.5** | **50265** | **53833** | **7.1** |
| **Sleepers** | | | | | | | | | | | | |
| IVORY COAST | 2854 | 3117 | 9.2 | 1790 | 1178 | -34.2 | 7044 | 6627 | -5.9 | 3975 | 2578 | -35.1 |
| BELGIUM | 692 | 798 | 15.3 | 259 | 431 | 66.4 | 4272 | 4187 | -2.0 | 3143 | 1842 | -41.4 |
| GABON | 0 | 287 | na | 0 | 1087 | na | 0 | 718 | na | 0 | 2510 | na |
| CAMEROON | 2055 | 277 | -86.5 | 90 | 521 | 478.9 | 5015 | 577 | -88.5 | 186 | 1064 | 472.0 |
| OTHER | 1130 | 531 | -53.0 | 273 | 315 | 15.4 | 5488 | 4352 | -20.7 | 2518 | 3053 | 21.2 |
| **TOTAL** | **6731** | **5010** | **-25.6** | **2412** | **3532** | **46.4** | **21819** | **16461** | **-24.6** | **9822** | **11047** | **12.5** |

| | Value (1000s euros) | | | | | | Weight (tonnes) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Planed, sanded and finger-jointed hardwood** | | | | | | | | | | | | |
| BRAZIL | 23459 | 24615 | 4.9 | 13701 | 12676 | -7.5 | 22949 | 25113 | 9.4 | 13578 | 15036 | 10.7 |
| GHANA | 3774 | 9055 | 139.9 | 5115 | 2865 | -44.0 | 4997 | 8725 | 74.6 | 4848 | 2720 | -43.9 |
| BELGIUM | 3489 | 4447 | 27.5 | 2461 | 1741 | -29.3 | 5080 | 3090 | -39.2 | 1743 | 1466 | -15.9 |
| INDONESIA | 2034 | 1914 | -5.9 | 902 | 1175 | 30.3 | 927 | 1508 | 62.7 | 677 | 522 | -22.9 |
| ITALY | 1827 | 1275 | -30.2 | 690 | 947 | 37.2 | 1329 | 448 | -66.3 | 634 | 879 | 38.6 |
| OTHER | 11606 | 11507 | -0.9 | 5091 | 6828 | 34.1 | 10330 | 9622 | -6.9 | 3990 | 5999 | 50.4 |
| **TOTAL** | **46189** | **52813** | **14.3** | **27960** | **26232** | **-6.2** | **45612** | **48506** | **6.3** | **25470** | **26622** | **4.5** |
| **Hardwood profiles** | | | | | | | | | | | | |
| ITALY | 18847 | 15424 | -18.2 | 8508 | 8021 | -5.7 | 4646 | 4126 | -11.2 | 2524 | 1800 | -28.7 |
| GERMANY | 7384 | 8296 | 12.4 | 3684 | 4274 | 16.0 | 5040 | 5900 | 17.1 | 2286 | 2805 | 22.7 |
| BELGIUM | 7149 | 5920 | -17.2 | 2693 | 4155 | 54.3 | 3596 | 4638 | 29.0 | 2248 | 2980 | 32.6 |
| AUSTRIA | 5397 | 5174 | -4.1 | 3217 | 864 | -73.1 | 4857 | 4755 | -2.1 | 2925 | 515 | -82.4 |
| OTHER | 32350 | 34713 | 7.3 | 17622 | 20004 | 13.5 | 27115 | 26636 | -1.8 | 12954 | 17338 | 33.8 |
| **TOTAL** | **71127** | **69527** | **-2.2** | **35724** | **37318** | **4.5** | **45254** | **46055** | **1.8** | **22937** | **25438** | **10.9** |
| **Planed hardwood veneers** | | | | | | | | | | | | |
| GERMANY | 1591 | 1896 | 19.2 | 559 | 1566 | 180.1 | 314 | 323 | 2.9 | 59 | 330 | 459.3 |
| ITALY | 1019 | 599 | -41.2 | 268 | 461 | 72.0 | 479 | 394 | -17.7 | 142 | 238 | 67.6 |
| OTHER | 2133 | 1318 | -38.2 | 695 | 976 | 40.4 | 1355 | 536 | -60.4 | 347 | 394 | 13.5 |
| **TOTAL** | **4743** | **3813** | **-19.6** | **1522** | **3003** | **97.3** | **2148** | **1253** | **-41.7** | **548** | **962** | **75.5** |
| **Windows and their frames** | | | | | | | | | | | | |
| DENMARK | 18055 | 20322 | 12.6 | 10896 | 5267 | -51.7 | 3902 | 4035 | 3.4 | 2306 | 1442 | -37.5 |
| BELGIUM | 4009 | 4369 | 9.0 | 2758 | 2241 | -18.7 | 989 | 678 | -31.4 | 371 | 692 | 86.5 |
| POLAND | 2642 | 4177 | 58.1 | 2469 | 4159 | 68.4 | 942 | 1354 | 43.7 | 798 | 1482 | 85.7 |
| INDONESIA | 1939 | 766 | -60.5 | 661 | 118 | -82.1 | 767 | 306 | -60.1 | 245 | 93 | -62.0 |
| OTHER | 7440 | 3998 | -46.3 | 2320 | 1637 | -29.4 | 3115 | 1589 | -49.0 | 868 | 974 | 12.2 |
| **TOTAL** | **34085** | **33632** | **-1.3** | **19104** | **13422** | **-29.7** | **9715** | **7962** | **-18.0** | **4588** | **4683** | **2.1** |
| **Doors and their frames** | | | | | | | | | | | | |
| BELGIUM | 8165 | 6896 | -15.5 | 3592 | 3397 | -5.4 | 3025 | 2856 | -5.6 | 1400 | 1375 | -1.8 |
| SPAIN | 6185 | 4468 | -27.8 | 2438 | 3045 | 24.9 | 3303 | 2299 | -30.4 | 1165 | 1807 | 55.1 |
| NETHERLANDS | 4531 | 3894 | -14.1 | 2042 | 1990 | -2.5 | 2279 | 2148 | -5.7 | 1144 | 1081 | -5.5 |
| GERMANY | 3661 | 3790 | 3.5 | 1697 | 2433 | 43.4 | 1370 | 1350 | -1.5 | 666 | 759 | 14.0 |
| OTHER | 15102 | 19135 | 26.7 | 8317 | 10486 | 26.1 | 6821 | 8729 | 28.0 | 3901 | 4814 | 23.4 |
| **TOTAL** | **37644** | **38183** | **1.4** | **18086** | **21351** | **18.1** | **16798** | **17382** | **3.5** | **8276** | **9836** | **18.8** |
| **Parquet panels** | | | | | | | | | | | | |
| GERMANY | 14612 | 13792 | -5.6 | 7298 | 4033 | -44.7 | 7711 | 6974 | -9.6 | 3616 | 1831 | -49.4 |
| SWEDEN | 6419 | 10616 | 65.4 | 5258 | 7738 | 47.2 | 2259 | 3400 | 50.5 | 1667 | 2743 | 64.5 |
| BELGIUM | 28981 | 5052 | -82.6 | 2841 | 2250 | -20.8 | 20443 | 5099 | -75.1 | 2852 | 2440 | -14.4 |
| ITALY | 3862 | 4655 | 20.5 | 2122 | 3261 | 53.7 | 1211 | 2305 | 90.3 | 494 | 2598 | 425.9 |
| OTHER | 16864 | 18952 | 12.4 | 8827 | 10064 | 14.0 | 8469 | 10459 | 23.5 | 4032 | 6788 | 68.4 |
| **TOTAL** | **70738** | **53067** | **-25.0** | **26346** | **27346** | **3.8** | **40093** | **28237** | **-29.6** | **12661** | **16400** | **29.5** |
| **Wooden furniture** | | | | | | | | | | | | |
| ITALY | 532255 | 536126 | 0.7 | 281587 | 287731 | 2.2 | 116545 | 111765 | -4.1 | 55265 | 62179 | 12.5 |
| BELGIUM | 290958 | 277204 | -4.7 | 139249 | 142901 | 2.6 | 100109 | 89044 | -11.1 | 44939 | 46472 | 3.4 |
| GERMANY | 183153 | 172139 | -6.0 | 86663 | 79180 | -8.6 | 86061 | 81330 | -5.5 | 38834 | 39989 | 3.0 |
| SPAIN | 157890 | 164679 | 4.3 | 83281 | 79410 | -4.6 | 58683 | 60032 | 2.3 | 29693 | 26925 | -9.3 |
| ROMANIA | 105323 | 119319 | 13.3 | 58257 | 59728 | 2.5 | 62373 | 68974 | 10.6 | 34255 | 35048 | 2.3 |
| BRAZIL | 80757 | 84544 | 4.7 | 38984 | 41111 | 5.5 | 41486 | 47333 | 14.1 | 21104 | 23837 | 13.0 |
| INDONESIA | 83019 | 82140 | -1.1 | 46112 | 47088 | 2.1 | 28984 | 30073 | 3.8 | 15287 | 18284 | 19.6 |
| POLAND | 62882 | 77671 | 23.5 | 37187 | 40977 | 10.2 | 38936 | 47397 | 21.7 | 22564 | 23994 | 6.3 |
| OTHER | 568860 | 564566 | -0.8 | 275078 | 296627 | 7.8 | 255907 | 255864 | 0.0 | 120896 | 143022 | 18.3 |
| **TOTAL** | **2065097** | **2078388** | **0.6** | **1046398** | **1074753** | **2.7** | **789084** | **791812** | **0.3** | **382837** | **419750** | **9.6** |

*Data sources: data is derived from data supplied by BTS Ltd drawn from Eurostat. Value and weight data is provided as supplied by BTS. Due to numerous errors in the Eurostat volume data, data provided here is estimated where necessary from weight data. For breakdown of harmonised system (HS) codes used to prepare these tables see page 15.*

# Hardwood imports - Germany

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical logs** | | | | | | | | | | | | |
| CAMEROON | 21219 | 18000 | **-15.2** | 9741 | 9512 | -2.4 | 58284 | 46419 | -20.4 | 23728 | 22810 | -3.9 |
| GABON | 8158 | 6444 | -21.0 | 2894 | 2338 | -19.2 | 28769 | 20316 | -29.4 | 9607 | 7765 | -19.2 |
| CONGO REPUBLIC | 8464 | 5748 | -32.1 | 2570 | 1613 | -37.2 | 20368 | 14748 | -27.6 | 6523 | 4294 | -34.2 |
| LIBERIA | 5368 | 3579 | -33.3 | 2838 | 1458 | -48.6 | 18295 | 14733 | -19.5 | 11140 | 7200 | -35.4 |
| BURMA | 3219 | 3395 | 5.5 | 2333 | 2021 | -13.4 | 2777 | 2635 | -5.1 | 1953 | 1404 | -28.1 |
| EQUAT. GUINEA | 3863 | 3045 | -21.2 | 1400 | 1125 | -19.6 | 16318 | 12154 | -25.5 | 5764 | 4459 | -22.6 |
| OTHER | 3779 | 2737 | -27.6 | 1224 | 2345 | 91.6 | 8536 | 5726 | -32.9 | 2450 | 3673 | 49.9 |
| **TOTAL** | **54070** | **42948** | **-20.6** | **23000** | **20412** | **-11.3** | **153347** | **116731** | **-23.9** | **61165** | **51605** | **-15.6** |
| **Beech logs** | | | | | | | | | | | | |
| FRANCE | 3674 | 3344 | -9.0 | 1961 | 2003 | 2.1 | 38449 | 51382 | 33.6 | 25396 | 19057 | -25.0 |
| AUSTRIA | 1011 | 924 | -8.6 | 701 | 198 | -71.8 | 4319 | 8918 | 106.5 | 4105 | 1450 | -64.7 |
| DENMARK | 688 | 648 | -5.8 | 587 | 414 | -29.5 | 4027 | 4294 | 6.6 | 3882 | 2528 | -34.9 |
| SLOVAKIA | 1319 | 573 | -56.6 | 414 | 332 | -19.8 | 4264 | 1614 | -62.1 | 1178 | 1043 | -11.5 |
| SWITZERLAND | 1408 | 483 | -65.7 | 394 | 391 | -0.8 | 8313 | 3324 | -60.0 | 2409 | 4495 | 86.6 |
| OTHER | 3034 | 1627 | -46.4 | 1164 | 829 | -28.8 | 17166 | 10139 | -40.9 | 7808 | 5385 | -31.0 |
| **TOTAL** | **11134** | **7599** | **-31.7** | **5221** | **4167** | **-20.2** | **76538** | **79671** | **4.1** | **44778** | **33958** | **-24.2** |
| **Oak logs** | | | | | | | | | | | | |
| U.S.A. | 3337 | 3386 | 1.5 | 3009 | 1626 | -46.0 | 6881 | 6870 | -0.2 | 6134 | 2773 | -54.8 |
| FRANCE | 2098 | 1283 | -38.8 | 770 | 728 | -5.5 | 18478 | 9082 | -50.8 | 4168 | 5003 | 20.0 |
| UKRAINE | 842 | 1031 | 22.4 | 737 | 708 | -3.9 | 3845 | 4306 | 12.0 | 3086 | 3138 | 1.7 |
| AUSTRIA | 749 | 946 | 26.3 | 532 | 331 | -37.8 | 1789 | 1728 | -3.4 | 973 | 714 | -26.6 |
| HUNGARY | 2112 | 380 | -82.0 | 380 | 132 | -65.3 | 8959 | 1480 | -83.5 | 1480 | 373 | -74.8 |
| OTHER | 1630 | 1915 | 17.5 | 1094 | 1334 | 21.9 | 7827 | 8685 | 11.0 | 5511 | 7143 | 29.6 |
| **TOTAL** | **10768** | **8941** | **-17.0** | **6522** | **4859** | **-25.5** | **47779** | **32151** | **-32.7** | **21352** | **19144** | **-10.3** |
| **Other hardwood logs** | | | | | | | | | | | | |
| U.S.A. | 45285 | 40660 | -10.2 | 27125 | 22256 | -18.0 | 55713 | 49761 | -10.7 | 34866 | 24935 | -28.5 |
| FRANCE | 3531 | 3586 | 1.6 | 2526 | 1948 | -22.9 | 12965 | 14639 | 12.9 | 9154 | 6186 | -32.4 |
| JAPAN | 2843 | 2682 | -5.7 | 1914 | 1953 | 2.0 | 1512 | 1420 | -6.1 | 1012 | 1225 | 21.0 |
| FINLAND | 2365 | 2394 | 1.2 | 1840 | 1287 | -30.1 | 7704 | 7006 | -9.1 | 5443 | 4001 | -26.5 |
| AUSTRIA | 857 | 1513 | 76.5 | 978 | 828 | -15.3 | 1995 | 3154 | 58.1 | 1832 | 1676 | -8.5 |
| OTHER | 11718 | 6689 | -42.9 | 4702 | 4720 | 0.4 | 34912 | 20043 | -42.6 | 14028 | 17283 | 23.2 |
| **TOTAL** | **66599** | **57524** | **-13.6** | **39085** | **32992** | **-15.6** | **114801** | **96023** | **-16.4** | **66335** | **55306** | **-16.6** |
| **Tropical sawn lumber** | | | | | | | | | | | | |
| MALAYSIA | 13753 | 17430 | 26.7 | 7159 | 7067 | -1.3 | 23440 | 29293 | 25.0 | 12349 | 12371 | 0.2 |
| GHANA | 20282 | 15259 | -24.8 | 8123 | 6488 | -20.1 | 55194 | 39909 | -27.7 | 20894 | 16470 | -21.2 |
| NETHERLANDS | 8739 | 10745 | 23.0 | 5196 | 4092 | -21.2 | 17494 | 22753 | 30.1 | 11971 | 7924 | -33.8 |
| CAMEROON | 8869 | 7522 | -15.2 | 3758 | 4106 | 9.3 | 15615 | 14971 | -4.1 | 7401 | 8174 | 10.4 |
| BELGIUM | 5408 | 4442 | -17.9 | 2276 | 2322 | 2.0 | 9582 | 7830 | -18.3 | 4312 | 4150 | -3.8 |
| INDONESIA | 3023 | 4325 | 43.1 | 1969 | 2576 | 30.8 | 3977 | 6988 | 75.7 | 3072 | 4217 | 37.3 |
| DENMARK | 1547 | 2161 | 39.7 | 571 | 1011 | 77.1 | 1764 | 1227 | -30.4 | 369 | 372 | 0.8 |
| BRAZIL | 2601 | 1833 | -29.5 | 1109 | 840 | -24.3 | 2649 | 1738 | -34.4 | 967 | 1067 | 10.3 |
| TANZANIA | 603 | 1356 | 124.9 | 631 | 534 | -15.4 | 163 | 418 | 156.4 | 278 | 93 | -66.5 |
| IVORY COAST | 1051 | 1299 | 23.6 | 661 | 605 | -8.5 | 2634 | 3210 | 21.9 | 1456 | 1380 | -5.2 |
| BURMA | 1725 | 1158 | -32.9 | 967 | 367 | -62.0 | 629 | 377 | -40.1 | 285 | 167 | -41.4 |
| OTHER | 7157 | 8092 | 13.1 | 4179 | 3844 | -8.0 | 8758 | 9720 | 11.0 | 4898 | 5064 | 3.4 |
| **TOTAL** | **74758** | **75622** | **1.2** | **36599** | **33852** | **-7.5** | **141899** | **138434** | **-2.4** | **68252** | **61449** | **-10.0** |
| **Beech sawn lumber** | | | | | | | | | | | | |
| POLAND | 4448 | 3659 | -17.7 | 2003 | 2194 | 9.5 | 10156 | 10485 | 3.2 | 5520 | 5649 | 2.3 |
| SLOVAKIA | 3357 | 3082 | -8.2 | 2007 | 1225 | -39.0 | 10770 | 8933 | -17.1 | 6108 | 3438 | -43.7 |
| BOSNIA & HERZ. | 2068 | 2682 | 29.7 | 1337 | 1293 | -3.3 | 4833 | 5883 | 21.7 | 3090 | 3068 | -0.7 |
| SLOVENIA | 1921 | 2472 | 28.7 | 1663 | 893 | -46.3 | 2371 | 3040 | 28.2 | 1911 | 1265 | -33.8 |
| SERBIA & MONT. | 1973 | 2470 | 25.2 | 1410 | 977 | -30.7 | 3595 | 3852 | 7.1 | 2386 | 1267 | -46.9 |
| AUSTRIA | 3660 | 2182 | -40.4 | 1084 | 1458 | 34.5 | 7163 | 4867 | -32.1 | 2296 | 3469 | 51.1 |
| FRANCE | 2531 | 2153 | -14.9 | 1151 | 757 | -34.2 | 10816 | 10460 | -3.3 | 5390 | 4009 | -25.6 |
| UKRAINE | 1680 | 2114 | 25.8 | 1098 | 1304 | 18.8 | 6790 | 8512 | 25.4 | 4625 | 5003 | 8.2 |
| ROMANIA | 3125 | 2067 | -33.9 | 1148 | 936 | -18.5 | 5319 | 3556 | -33.1 | 1968 | 1761 | -10.5 |
| OTHER | 10188 | 6089 | -40.2 | 3060 | 3264 | 6.7 | 20692 | 12941 | -37.5 | 8028 | 5331 | -33.6 |
| **TOTAL** | **34951** | **28970** | **-17.1** | **15961** | **14301** | **-10.4** | **82505** | **72529** | **-12.1** | **41322** | **34260** | **-17.1** |
| **Oak sawn lumber** | | | | | | | | | | | | |
| U.S.A. | 12338 | 9528 | -22.8 | 5228 | 3905 | -25.3 | 17797 | 14293 | -19.7 | 7597 | 6851 | -9.8 |
| UKRAINE | 7644 | 8479 | 10.9 | 4155 | 3844 | -7.5 | 34906 | 35939 | 3.0 | 17093 | 14806 | -13.4 |
| FRANCE | 2949 | 3006 | 1.9 | 1737 | 798 | -54.1 | 6766 | 5708 | -15.6 | 3059 | 2559 | -16.3 |
| CANADA | 2529 | 2809 | 11.1 | 1551 | 696 | -55.1 | 3365 | 3673 | 9.2 | 2006 | 1002 | -50.0 |
| POLAND | 1868 | 2336 | 25.1 | 957 | 1073 | 12.1 | 6293 | 4959 | -21.2 | 1773 | 1947 | 9.8 |
| LITHUANIA | 1993 | 2193 | 10.0 | 1035 | 1368 | 32.2 | 1759 | 1861 | 5.8 | 952 | 1116 | 17.2 |
| CZECH REPUBLIC | 1614 | 1624 | 0.6 | 879 | 782 | -11.0 | 5423 | 4922 | -9.2 | 2696 | 3199 | 18.7 |
| AUSTRIA | 1349 | 1243 | -7.9 | 599 | 752 | 25.5 | 2094 | 2058 | -1.7 | 1066 | 1308 | 22.7 |
| NETHERLANDS | 1080 | 1226 | 13.5 | 552 | 653 | 18.3 | 1718 | 2042 | 18.9 | 1010 | 1099 | 8.8 |
| OTHER | 4062 | 4026 | -0.9 | 2201 | 2019 | -8.3 | 10393 | 9975 | -4.0 | 5634 | 5582 | -0.9 |
| **TOTAL** | **37426** | **36470** | **-2.6** | **18894** | **15890** | **-15.9** | **90514** | **85430** | **-5.6** | **42886** | **39469** | **-8.0** |
| **Other hardwood sawn lumber** | | | | | | | | | | | | |
| CANADA | 33927 | 25331 | -25.3 | 13811 | 12184 | -11.8 | 27845 | 23158 | -16.8 | 12004 | 12686 | 5.7 |
| LITHUANIA | 13984 | 16746 | 19.8 | 7294 | 9775 | 34.0 | 130174 | 151142 | 16.1 | 67982 | 76061 | 11.9 |
| U.S.A. | 20011 | 15202 | -24.0 | 9159 | 9357 | 2.2 | 19564 | 17449 | -10.8 | 9874 | 12184 | 23.4 |
| LATVIA | 6990 | 6851 | -2.0 | 3797 | 3208 | -15.5 | 55732 | 53795 | -3.5 | 28437 | 25333 | -10.9 |
| NETHERLANDS | 3185 | 3442 | 8.1 | 2171 | 831 | -61.7 | 3687 | 4023 | 9.1 | 1850 | 1083 | -41.5 |
| BELARUS | 3695 | 3048 | -17.5 | 1445 | 1357 | -6.1 | 38110 | 31242 | -18.0 | 14897 | 14567 | -2.2 |
| POLAND | 3232 | 2900 | -10.3 | 1805 | 1693 | -6.2 | 13102 | 11836 | -9.7 | 6680 | 6863 | 2.7 |
| RUSSIA | 3246 | 2895 | -10.8 | 1229 | 757 | -38.4 | 34515 | 30122 | -12.7 | 12896 | 7166 | -44.4 |
| OTHER | 14452 | 12082 | -16.4 | 7175 | 6022 | -16.1 | 42559 | 35804 | -15.9 | 21027 | 19420 | -7.6 |
| **TOTAL** | **102722** | **88497** | **-13.8** | **47886** | **45184** | **-5.6** | **365288** | **358571** | **-1.8** | **175647** | **175363** | **-0.2** |
| **Tropical hardwood veneer** | | | | | | | | | | | | |
| IVORY COAST | 11899 | 7913 | -33.5 | 4163 | 4704 | 13.0 | 33325 | 22580 | -32.2 | 11844 | 14327 | 21.0 |
| ITALY | 3481 | 7829 | 124.9 | 3097 | 3365 | 8.7 | 1527 | 2988 | 95.7 | 1272 | 1157 | -9.0 |
| GHANA | 5299 | 5695 | 7.5 | 3148 | 3278 | 4.1 | 7319 | 7325 | 0.1 | 4236 | 5469 | 29.1 |
| FRANCE | 1566 | 1746 | 11.5 | 671 | 780 | 16.2 | 920 | 1112 | 20.9 | 411 | 502 | 22.1 |
| BELGIUM | 373 | 1419 | 280.4 | 581 | 400 | -31.2 | 366 | 1705 | 365.8 | 719 | 329 | -54.2 |
| U.S.A. | 1372 | 1326 | -3.4 | 1138 | 320 | -71.9 | 750 | 442 | -41.1 | 401 | 35 | -91.3 |
| OTHER | 6393 | 7635 | 19.4 | 4381 | 2430 | -44.5 | 8023 | 7388 | -7.9 | 4234 | 2064 | -51.3 |
| **TOTAL** | **30383** | **33563** | **10.5** | **17179** | **15277** | **-11.1** | **52230** | **43540** | **-16.6** | **23117** | **23883** | **3.3** |
| **Other hardwood veneer** | | | | | | | | | | | | |
| U.S.A. | 82392 | 61885 | -24.9 | 32655 | 33638 | 3.0 | 43632 | 26803 | -38.6 | 12949 | 15485 | 19.6 |
| ITALY | 8902 | 12526 | 40.7 | 4535 | 7790 | 71.8 | 3220 | 3045 | -5.4 | 1712 | 1319 | -23.0 |
| POLAND | 8672 | 12172 | 40.4 | 6404 | 5869 | -8.4 | 7284 | 10119 | 38.9 | 5706 | 7933 | 39.0 |
| SWITZERLAND | 13677 | 10465 | -23.5 | 5737 | 5218 | -9.0 | 7389 | 6615 | -10.5 | 3021 | 2459 | -18.6 |
| FRANCE | 17829 | 10172 | -42.9 | 5138 | 5691 | 10.8 | 6489 | 5426 | -16.4 | 2998 | 3755 | 25.3 |
| CZECH REPUBLIC | 9407 | 9951 | 5.8 | 4228 | 8023 | 89.8 | 5950 | 8384 | 40.9 | 3490 | 6874 | 97.0 |
| OTHER | 53624 | 48865 | -8.9 | 25535 | 24578 | -3.7 | 32209 | 26953 | -16.3 | 13418 | 14595 | 8.8 |
| **TOTAL** | **194503** | **166036** | **-14.6** | **84232** | **90807** | **7.8** | **106173** | **87345** | **-17.7** | **43294** | **52420** | **21.1** |

***The German economy has stalled and GDP growth contracted by 0.1% quarter-on-quarter in the second quarter of 2003. The construction sector is depressed and sales of furniture have been falling.*** In addition to weak domestic demand, manufacturers have had to deal with falling export sales as the euro has strengthened and pressure from overseas competitors intensified. Relatively high production costs have further undermined the competitiveness of German industry. Many manufacturers have shifted facilities out of Germany altogether and relocated in Eastern Europe. But there are signs of improvement in the German economy. Forward-looking indicators have continued to strengthen in 2003, prompting the Economist Intelligence Unit to forecast GDP growth of 1.8% in 2004.

These broad economic trends are mirrored in the timber import statistics. German imports of just about all primary wood products (logs, sawn lumber, plywood and veneer) declined in 2002. But imports of further processed and finished products remained reasonably stable.

During the first half of 2003, the decline in imports of hardwood logs and sawn lumber continued. However there were signs of a rebound in imports of hardwood veneer and plywood. There was also a strong rise in German imports of other further processed products (hardwood profiles, window frames, and wood furniture) during this period. This again partly reflects the general shift in wood product manufacturing capacity away from Germany to Eastern Europe. But it may also be indicative of improved business sentiment in Germany.

Meanwhile, German domestic wood production has continued to fall. Hardwood log and sawn lumber production reached 3.37 million m3 and 1 million m3 respectively during 2002, well down on the previous year.

# Hardwood imports - Germany

| | Value (1000s euros) | | | | | | Volume (m3) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Tropical hardwood plywood** | | | | | | | | | | | | |
| INDONESIA | 48263 | 34373 | -28.8 | 16558 | 17003 | 2.7 | 104172 | 76231 | -26.8 | 35128 | 37110 | 5.6 |
| ITALY | 14264 | 10237 | -28.2 | 4967 | 5689 | 14.5 | 29293 | 14198 | -51.5 | 7204 | 7272 | 0.9 |
| BRAZIL | 11911 | 8817 | -26.0 | 5031 | 5218 | 3.7 | 26343 | 21422 | -18.7 | 11355 | 16032 | 41.2 |
| SPAIN | 7743 | 7807 | 0.8 | 4499 | 4861 | 8.0 | 13707 | 14157 | 3.3 | 8115 | 8782 | 8.2 |
| FRANCE | 5740 | 3715 | -35.3 | 1953 | 2148 | 10.0 | 7930 | 4890 | -38.3 | 2584 | 2662 | 3.0 |
| MALAYSIA | 3705 | 1872 | -49.5 | 1081 | 1209 | 11.8 | 9336 | 4013 | -57.0 | 2052 | 2682 | 30.7 |
| OTHER | 12688 | 9945 | -21.6 | 4617 | 5510 | 19.3 | 23128 | 18493 | -20.0 | 8672 | 12161 | 40.2 |
| **TOTAL** | **104314** | **76766** | **-26.4** | **38706** | **41638** | **7.6** | **213909** | **153404** | **-28.3** | **75110** | **86701** | **15.4** |
| **Other hardwood plywood** | | | | | | | | | | | | |
| FINLAND | 92906 | 73022 | -21.4 | 40527 | 49484 | 22.1 | 134295 | 105077 | -21.8 | 58128 | 71438 | 22.9 |
| ITALY | 25248 | 23618 | -6.5 | 12780 | 11286 | -11.7 | 39828 | 38282 | -3.9 | 21143 | 18476 | -12.6 |
| RUSSIA | 14831 | 18302 | 23.4 | 8221 | 10964 | 33.4 | 41470 | 46885 | 13.1 | 20815 | 29036 | 39.5 |
| LATVIA | 23377 | 17488 | -25.2 | 9563 | 7750 | -19.0 | 39429 | 31384 | -20.4 | 17462 | 13649 | -21.8 |
| POLAND | 13350 | 15309 | 14.7 | 7378 | 8986 | 21.8 | 26495 | 30964 | 16.9 | 14758 | 18319 | 24.1 |
| AUSTRIA | 11844 | 8847 | -25.3 | 4108 | 4951 | 20.5 | 21789 | 17648 | -19.0 | 9280 | 7903 | -14.8 |
| OTHER | 53860 | 60892 | 13.1 | 30311 | 33937 | 12.0 | 121602 | 135343 | 11.3 | 67487 | 72647 | 7.6 |
| **TOTAL** | **235416** | **217478** | **-7.6** | **112888** | **127358** | **12.8** | **424908** | **405584** | **-4.5** | **209073** | **231469** | **10.7** |
| **Sleepers** | | | | | | | | | | | | |
| FRANCE | 2594 | 3238 | 24.8 | 1504 | 887 | -41.0 | 10739 | 14315 | 33.3 | 6974 | 4259 | -38.9 |
| NETHERLANDS | 847 | 493 | -41.8 | 168 | 196 | 16.7 | 9897 | 3584 | -63.8 | 1042 | 1198 | 15.0 |
| AUSTRIA | 55 | 398 | 623.6 | 147 | 4 | -97.3 | 186 | 1306 | 602.2 | 406 | 42 | -89.7 |
| CZECH REPUBLIC | 274 | 159 | -42.0 | 65 | 82 | 26.2 | 1024 | 670 | -34.6 | 288 | 417 | 44.8 |
| OTHER | 243 | 162 | -33.3 | 120 | 11 | -90.8 | 1028 | 729 | -29.1 | 563 | 54 | -90.4 |
| **TOTAL** | **4013** | **4450** | **10.9** | **2004** | **1180** | **-41.1** | **22874** | **20604** | **-9.9** | **9274** | **5970** | **-35.6** |

| | Value (1000s euros) | | | | | | Weight (tonnes) | | | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | 2001 Year | 2002 Year | % chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 | 2001 Year | 2002 Year | %chg 01-02 | 2002 Jan-Jun | 2003 Jan-Jun | % chg 02-03 |
| **Planed, sanded and finger-jointed hardwood** | | | | | | | | | | | | |
| NETHERLANDS | 1853 | 2250 | 21.4 | 1242 | 991 | -20.2 | 1793 | 2028 | 13.1 | 1064 | 993 | -6.7 |
| AUSTRIA | 1551 | 2090 | 34.8 | 979 | 702 | -28.3 | 1233 | 1154 | -6.4 | 930 | 695 | -25.3 |
| GHANA | 684 | 1711 | 150.1 | 389 | 696 | 78.9 | 519 | 1606 | 209.4 | 475 | 639 | 34.5 |
| BELGIUM | 653 | 714 | 9.3 | 387 | 527 | 36.2 | 309 | 829 | 168.3 | 465 | 394 | -15.3 |
| POLAND | 569 | 546 | -4.0 | 350 | 442 | 26.3 | 781 | 874 | 11.9 | 518 | 258 | -50.2 |
| OTHER | 4762 | 5678 | 19.2 | 2573 | 2979 | 15.8 | 5397 | 5182 | -4.0 | 2442 | 3625 | 48.4 |
| **TOTAL** | **10072** | **12989** | **29.0** | **5920** | **6337** | **7.0** | **10032** | **11673** | **16.4** | **5894** | **6604** | **12.0** |
| **Hardwood profiles** | | | | | | | | | | | | |
| POLAND | 14940 | 14611 | -2.2 | 7259 | 8386 | 15.5 | 14969 | 13829 | -7.6 | 7419 | 7323 | -1.3 |
| AUSTRIA | 5786 | 9942 | 71.8 | 4043 | 5885 | 45.6 | 5010 | 8488 | 69.4 | 3579 | 3943 | 10.2 |
| INDONESIA | 4799 | 7536 | 57.0 | 2810 | 4285 | 52.5 | 5446 | 9841 | 80.7 | 3371 | 6400 | 89.9 |
| ITALY | 6305 | 5253 | -16.7 | 2350 | 3375 | 43.6 | 1259 | 854 | -32.2 | 369 | 517 | 40.1 |
| OTHER | 35572 | 30172 | -15.2 | 14820 | 17924 | 20.9 | 30768 | 25776 | -16.2 | 12360 | 15664 | 26.7 |
| **TOTAL** | **67402** | **67514** | **0.2** | **31282** | **39855** | **27.4** | **57452** | **58788** | **2.3** | **27098** | **33847** | **24.9** |
| **Planed hardwood veneers** | | | | | | | | | | | | |
| HUNGARY | 3805 | 4174 | 9.7 | 1950 | 2660 | 36.4 | 942 | 888 | -5.7 | 423 | 923 | 118.2 |
| ESTONIA | 1553 | 2653 | 70.8 | 885 | 2063 | 133.1 | 659 | 925 | 40.4 | 361 | 433 | 19.9 |
| OTHER | 4373 | 5462 | 24.9 | 2500 | 2529 | 1.2 | 2193 | 3114 | 42.0 | 1454 | 1675 | 15.2 |
| **TOTAL** | **9731** | **12289** | **26.3** | **5335** | **7252** | **35.9** | **3794** | **4927** | **29.9** | **2238** | **3031** | **35.4** |
| **Windows and their frames** | | | | | | | | | | | | |
| DENMARK | 35006 | 36416 | 4.0 | 16758 | 17213 | 2.7 | 6500 | 7425 | 14.2 | 3342 | 3549 | 6.2 |
| POLAND | 28169 | 31900 | 13.2 | 15818 | 21466 | 35.7 | 8817 | 9323 | 5.7 | 4976 | 6461 | 29.8 |
| AUSTRIA | 18703 | 19164 | 2.5 | 9909 | 8882 | -10.4 | 3205 | 3211 | 0.2 | 1647 | 1586 | -3.7 |
| FRANCE | 10640 | 9030 | -15.1 | 4394 | 3786 | -13.8 | 2675 | 2232 | -16.6 | 1081 | 949 | -12.2 |
| OTHER | 17392 | 14841 | -14.7 | 6386 | 6268 | -1.8 | 6097 | 5163 | -15.3 | 2430 | 2521 | 3.7 |
| **TOTAL** | **109910** | **111351** | **1.3** | **53265** | **57615** | **8.2** | **27294** | **27354** | **0.2** | **13476** | **15066** | **11.8** |
| **Doors and their frames** | | | | | | | | | | | | |
| DENMARK | 37594 | 45111 | 20.0 | 16171 | 31975 | 97.7 | 9349 | 15038 | 60.9 | 4973 | 9507 | 91.2 |
| HUNGARY | 12549 | 14301 | 14.0 | 7323 | 6650 | -9.2 | 11031 | 10870 | -1.5 | 6058 | 4522 | -25.4 |
| SLOVENIA | 17535 | 13066 | -25.5 | 7120 | 5693 | -20.0 | 8128 | 6153 | -24.3 | 3367 | 2712 | -19.5 |
| POLAND | 11308 | 10624 | -6.0 | 4851 | 4951 | 2.1 | 4023 | 3554 | -11.7 | 1675 | 1691 | 1.0 |
| OTHER | 64371 | 47623 | -26.0 | 25781 | 18746 | -27.3 | 21228 | 17181 | -19.1 | 8934 | 6863 | -23.2 |
| **TOTAL** | **143357** | **130725** | **-8.8** | **61246** | **68015** | **11.1** | **53759** | **52796** | **-1.8** | **25007** | **25295** | **1.2** |
| **Parquet panels** | | | | | | | | | | | | |
| AUSTRIA | 27461 | 44662 | 62.6 | 19834 | 18788 | -5.3 | 9760 | 19675 | 101.6 | 8879 | 7272 | -18.1 |
| SWITZERLAND | 19869 | 15631 | -21.3 | 6891 | 7436 | 7.9 | 4114 | 3392 | -17.5 | 1534 | 1603 | 4.5 |
| FRANCE | 10399 | 14348 | 38.0 | 4768 | 4900 | 2.8 | 5687 | 6699 | 17.8 | 2132 | 2347 | 10.1 |
| POLAND | 12734 | 11903 | -6.5 | 5225 | 7573 | 44.9 | 12354 | 11902 | -3.7 | 5436 | 6989 | 28.6 |
| OTHER | 116275 | 96799 | -16.7 | 46179 | 37844 | -18.0 | 59566 | 48338 | -18.8 | 23047 | 20670 | -10.3 |
| **TOTAL** | **186738** | **183343** | **-1.8** | **82897** | **76541** | **-7.7** | **91481** | **90006** | **-1.6** | **41028** | **38881** | **-5.2** |
| **Wooden furniture** | | | | | | | | | | | | |
| POLAND | 989588 | 1023165 | 3.4 | 530041 | 595544 | 12.4 | 562099 | 559338 | -0.5 | 286359 | 324396 | 13.3 |
| ITALY | 590108 | 527590 | -10.6 | 285424 | 248143 | -13.1 | 148182 | 139489 | -5.9 | 72613 | 65576 | -9.7 |
| DENMARK | 352542 | 325263 | -7.7 | 154875 | 166641 | 7.6 | 132433 | 132958 | 0.4 | 61549 | 62920 | 2.2 |
| CZECH REPUBLIC | 167443 | 155164 | -7.3 | 79294 | 74445 | -6.1 | 108434 | 95152 | -12.2 | 48243 | 41926 | -13.1 |
| ROMANIA | 123244 | 119059 | -3.4 | 64147 | 63002 | -1.8 | 83524 | 76613 | -8.3 | 42432 | 38844 | -8.5 |
| AUSTRIA | 141940 | 105577 | -25.6 | 55027 | 42616 | -22.6 | 32746 | 30214 | -7.7 | 15610 | 12272 | -21.4 |
| SWEDEN | 75584 | 96380 | 27.5 | 48538 | 52381 | 7.9 | 42522 | 64225 | 51.0 | 31267 | 36775 | 17.6 |
| NETHERLANDS | 93220 | 93434 | 0.2 | 50095 | 44507 | -11.2 | 37104 | 54739 | 47.5 | 30513 | 28966 | -5.1 |
| OTHER | 1013114 | 980658 | -3.2 | 519631 | 532962 | 2.6 | 451035 | 452768 | 0.4 | 227352 | 270384 | 18.9 |
| **TOTAL** | **3546783** | **3426290** | **-3.4** | **1787072** | **1820241** | **1.9** | **1598079** | **1605496** | **0.5** | **815938** | **882059** | **8.1** |

*Data sources: data is derived from data supplied by BTS Ltd drawn from Eurostat. Value and weight data is provided as supplied by BTS. Due to numerous errors in the Eurostat volume data, data provided here is estimated where necessary from weight data. For breakdown of harmonised system (HS) codes used to prepare these tables see page 15.*

***In next month's issue, import data will be provided for another four European countries. Data for all E.U. countries will also be made available to subscribers at www.hardwoodmarkets.com***

# HS codes

**Harmonised system codes used for EU trade data**

**Tropical logs:** 44034980, 44034995, 44034920, 44034100, 44034910, 44034940, 44039995 (from tropical countries), 44039998 (from tropical countries).

**Beech logs:** 44039200, 44039290, 44039210.

**Oak logs:** 44039100, 44039190, 44039110.

**Other hardwood logs:** 44039950, 44039910, 44039959, 44039951, 44039995 (from non tropical countries), 44039998 (from non tropical countries).

**Tropical hardwood plywood:** 44121390, 44121310, 44129299, 44122299, 44129210, 44122210, 44129291, 44122291.

**Other hardwood plywood:** 44121400, 44122980, 44122300, 44122920.

**Tropical sawn lumber:** 44079994, 44079996, 44072969, 44072999, 44072995, 44072961, 44072560, 44072580, 44072490, 44072690.

**Beech sawn lumber:** 44079200.

**Oak sawn lumber:** 44079190.

**Other hardwood lumber:** 44079997, 44079991.

**Planed, sanded, or finger jointed hardwood:** 44079910, 44079115, 44072905, 44072510, 44072610, 44079930, 44079139, 44072931, 44072983, 44072930, 44072939, 44072920, 44072530, 44072430, 44072630, 44079950, 44072950, 44072985, 44072550, 44072650 44072415.

**Hardwood profiles:** 44092091, 44079131, 44092011, 44092098.

**Tropical hardwood veneers:** 44083985, 44083995, 44083935, 44083980, 44083990, 44083931, 44083921, 44083130.

**Other hardwood veneers:** 44089089, 44089085, 44089081, 44089095.

**Planed hardwood veneers:** *These include all products which are planed, sanded, or finger jointed and boards for pencils:* 44083111, 44089035, 44083970, 44083121, 44083955, 44089015, 44083125, 44083915.

**Doors and frames:** 44182080, 44182010.

**Windows and their frames:** 44181090, 44181010.

**Wood furniture:** *Includes finished furniture, furniture components, and prefabricated buildings of wood* 94016100, 94016900, 94019030, 94033011, 94033019, 94033091, 94033099, 94034090, 94035000, 94036010, 94036030, 94036090, 94039030, 94060010.

### African balancing act
The fragile balance between low supplies and sluggish demand that has characterized the African log market for many months, is expected to continue at least until the end of 2003. African producers are having to absorb extra costs resulting from rising taxes in several African countries as efforts to raise log prices have tended to falter. In the African sawn lumber market, there remains a clear split between the entandrophragmas (sapele, utile, sipo) and other species. Although stocks of the entandrophragmas at source in the Congo Basin are not high, there seems to be quite a bit of volume on the ground in Europe which is impeding forward orders. Prices for species such as iroko, framire, and khaya, more dominant in west Africa than in the Congo basin, are generally firm. But political problems and major resource constraints mean that available supplies of logs in these species are now very limited. **Pages 2,3,4**

### Liberian sanctions maintained
At a meeting on 26 August 2003, the UN security Council agreed that sanctions against the Liberian timber industry should remain in force for a period of 10 months from time of introduction on 7 July 2003. **Page 4**

### No pick-up for meranti
Malaysian sawn lumber production is constrained by relatively low log supply and declining log quality. Restrictions on log imports from Indonesia have deprived mills of an important source of raw material.The hoped for pick up in European demand for dark red meranti after the summer vacation has not materialized. This has led to price weakness for certain meranti products. Export sales of Malaysian and Indonesian decking profiles have been more robust and prices are firm. **Pages 4,5**

### Brazilian turning point
Economic recession has meant that Brazilian domestic demand for hardwood lumber has been slow this year. However this has been partially offset by a rise in export sales. Sales of flooring blanks to China and of decking to the United States have been thriving. But economic conditions are on the turn in Brazil. The domestic economy may be about to rebound, and the Brazilian currency is begininng to strengthen. This is already contributing to rising dollar prices for Brazilian products. **Page 5**

### U.S. recovery continues
Economic data released in early October suggests that the U.S. recovery is continuing, although there are a few areas of uncertainty. U.S. hardwood lumber demand remains steady, with particularly strong buying of lower grade lumber. Log inventories have generally improved over recent months but remain below normal for this time of year. There continue to be reports of green lumber shortages in certain species and grades, notably oak. **Pages 1, 6**

### U.S. exports: some improvement
In the January to July 2003 period, the volume of U.S. hardwood lumber exports fell around 2.8% compared to the same period the previous year. Rising exports to Canada, Mexico, mainland China and Italy compensated for big falls elsewhere. Notably weak export markets during this period were Spain, the U.K., Hong Kong, and South Korea. However there were signs of a pick-up in U.S. export demand during September from Southern Europe and China. **Page 6**

### Greater market stability
Global production and consumption of temperate hardwood sawn lumber products stabilised during 2002 at the lower levels recorded the previous year. So says the annual UNECE Forest Products Market Analysis published in September. The report identified four factors characterising hardwood markets in 2002 and the first half of 2003. First there is a change in the structure of the hardwood trade, with imports of semi-finished and finished products replacing those of logs and sawnwood. Second there is a measured return to darker species, after a decade or more of the blonde wood trend in Europe. This is manifest in greater consumer interest in tropical species, especially in hardwood flooring, and in a return to oak after some recent lean years. Third, American exporters face increasing competition from European hardwood producers. Fourth, the recent change in exchange rates between the U.S. dollar and the euro has given relief to American hardwood exporters. **Page 7**

### Patchy picture in Spain
Spain's economy has remained more bouyant than in most other E.U. countries this year. Low interest rates have helped prop up construction sector activity. However the nation's manufacturing sector is under great pressure from imported product. These trends have created a patchy picture in Spain's wood import data for the first half of 2003. There also seems to have been a significant shift to lower value products as a cost saving device. **Pages 8,9**

### Falling U.K. import value
UK import statistics for the first of 2003 suggest that there has been some recovery in hardwood import volumes this year, but there has been a significant shift to lower value material. The trend towards rising imports of value added wood components and finished products has continued this year, but at a slower rate of growth. **Pages 10,11**

### French tropical log imports slide
French imports of tropical hardwood logs have continued to decline this year. This has not been offset by any significant rise in imports of tropical sawn lumber. French imports of temperate hardwood logs have tended to rise due to reduced domestic availability. The wider European trend to increase imports of further processed products at the expense of primary products is evident in France, but to a lesser extent than in other E.U. countries. **Pages 12, 13**

### German structural changes
German import data for the first half of 2003 bears the imprint of weak economic growth and major structural changes in the nation's wood industry. German imports of primary wood products are falling, while imports of wood components and finished products are rising steeply. **Pages 14,15**