

STATEMENT

**submitted by the
Delegation of Germany
to the**

**67th Session of the
UNECE Timber Committee**

**from 12 to 16 October 2009
in Geneva**

Federal Ministry of Food, Agriculture and Consumer Protection

Bonn, September 2009

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1. Main economic developments in Germany

This year, the German economy is facing one of the greatest tests to its resilience since reunification. Short-term prospects for growth have deteriorated significantly. Declining demand from Germany's trading partners and the escalation of the financial crisis are having a particularly powerful impact on the German economy due to its strong dependence on exports. Foreign trade and investment, which have been a key engine for growth in recent years, will hardly contribute to economic growth in 2009. While consumer spending may be able to stabilise current trends - partially due to fiscal policy stimuli - it will not be able to fully counteract the dampening effects of the global economy. For 2009 as a whole, the Federal Government expects Gross Domestic Product to decline by 2.25 percent (price-adjusted). The labour market will not escape this development unscathed. In an act of tremendous financial effort, the Federal Government adopted a series of measures that can be implemented quickly and that will have a rapid impact. These measures aim to restore confidence in financial markets, to prevent structural rigidities, to secure jobs, to strengthen the forces for growth and to modernise the country. The federal Länder and municipal levels are called upon equally to engage in this effort.

In contrast to previous down-turns Germany is having to cope above all with a slump in international demand as well as a crisis on financial markets. For this reason, the Federal Government takes short-term steps to strengthen the German economy, in order to minimise the impending long-term costs of a severe slump in demand. During the earliest possible stage of the economic downturn, the Federal Government implemented stabilising measures to stimulate demand while simultaneously enhancing long-term potential growth.

In the fall of 2008, it was essential first of all to decisively counteract the profound loss of confidence among banks. In order to restore confidence in the stability of the financial system, the Federal Government adopted a comprehensive rescue package for Germany's

financial system. This package was firmly embedded in the overall approach taken by the international community. The Financial Market Stabilisation Act encompasses a package of measures that aim to restore order to commercial transactions between financial institutions. These measures are time-limited, and they are designed to minimise potential burdens that may result for taxpayers. Assistance under the Act is tied to strict conditions. In addition, new accounting rules will apply for a limited period of time. The Federal Government has announced an unlimited guarantee on all private deposits in Germany, thereby guaranteeing that German deposit guarantee schemes for banks will function effectively for all private individuals regardless of the amount of their deposits.

In order to minimise the extent to which the financial crisis and the international economic slowdown can spread to the general economy, the Federal Government has acted in a timely manner to adopt a series of measures. By adopting the "Package of measures to reduce tax burdens, stabilise social insurance contributions and invest in families" as well as the 15-point programme "Securing jobs by strengthening growth", the Federal Government has already taken steps that will reduce tax burdens on private citizens and businesses by approximately 30 billion euros in 2009 and 2010. In addition, the "Kreditanstalt für Wiederaufbau" will safeguard the financing and liquidity of companies, thereby securing funding for investments totalling approximately 20 billion euros.

The Federal Government responded to the deterioration in the economic outlook by adopting the "Pact for employment and stability in Germany". Adverse trends have been exacerbated by interactions between negative cyclical forces, problems on financial markets and ongoing crises in certain key sectors. These multi-layered problems involving demand and financing necessitate a targeted and balanced package of measures. It is precisely for this reason that the Federal Government decided to adopt a broad and integrated approach. The "Pact for employment and stability in Germany" targets five core areas: public investment, the supply of credit to the economy, employment and skills, tax reduction and sustainable fiscal policy. One key priority is to reduce taxes and social insurance contributions. This will boost consumer purchasing power while simultaneously improving incentives for employment and private investment.

These tax cuts will be complemented by additional public investments in infrastructure as well as policies to promote education and skills development. The measures that address the labour market aim to avoid layoffs and to build skills. The Pact contains measures for 2009 and 2010 that involve total funding in the amount of 50 billion euros. Together with the measures already adopted in 2008, the German government is targeting over 80 billion euros toward the goals of overcoming the crisis and achieving the comprehensive modernisation of the country. Even when compared to other countries, this represents a massive stimulus for

growth. Short-term crisis management is crucial. At the same time, however, the Federal Government is not losing sight of medium-term challenges involving demographic changes, rising environmental risks and developments on global markets.

Selected key figures for macroeconomic trends in Germany¹⁾			
	2007	2008	Annual projection 2009
Year-on-year changes in %			
Gross domestic product (price-adjusted)	2.5	1.3	-2.25
Employment (in Germany)	1.7	1.5	-0.7
Unemployment rate in % (as defined by the Federal Labour Agency) ²⁾	9.0	7.8	8.4
Use of GDP (price-adjusted)			
Private households and private non-profit institutions serving private households	-0.4	0.0	0.8
Machinery and equipment	6.9	5.3	-11.9
Construction	1.8	2.8	-0.3
Domestic demand	1.1	1.6	-0.1
Exports	7.5	3.9	-8.9
Imports	5.0	5.1	-5.0
Contribution of foreign trade and payments to GDP growth rate ³⁾	1.4	-0.3	-2.2
Gross wages and salaries per person employed (nominal)	1.6	2.3	2.0

[1] Up to 2008, preliminary figures from the Federal Statistical Office as of 15 January 2009.

[2] Based on total number of persons employed.

[3] Contribution to GDP growth rate.

2. Market drivers and policy measures influencing forest sector

Regarding timber, European forests have provided society with goods and services without problems for decades. Since there are new market drivers such as rising energy prices, policy measures to reduce greenhouse gas emissions or new requirements to secure biodiversity in the forests, situation is about to change. Continuous demand of timber for material use and the current renaissance of bioenergy led to intensified raw material competition. Controversal claims of timber users and nature protectors pose new questions on how to deal best with renewable raw material originating from forests.

In spite of enormous timber stocks which have been piled up for decades, foresters are asked now whether there is enough space to meet the demand in material and energetic wood utilisation without jeopardising sustainability rules. How to manage trade-offs between different demand sides? Where is the new equilibrium between material and energetic utilisation? It becomes obvious that new challenges are arising for all stakeholders involved. The questions are similar not only in European countries and they contain cross-sectoral dimensions. Therefore it is important to collect experience and take the opportunity of international fora to elaborate strategies and possible solutions.

a) Wood energy markets

The expansion of renewable energies in Germany is a success story. As one of the most important sources biomass has been able to gain further ground. During the last 5 years, the contribution of renewables in final energy consumption increased from 143 to 237 TWh (share of 9.7 %). Biomass has become the most important pillar (70 %) within the renewables scene. With a share of 7.7 % regarding total heat supply it was possible to further on increase the significance of renewables last year. The dominating resource in this sector was biomass (94 %). In 2008 renewables contributed to the total electricity consumption with 15 % (2007: 14 %). In this sector biomass reached a share of about 28 %. Against this background renewable energy technologies have become an important industrial player in Germany.

This development contributes to additional macroeconomic benefits. Last year, the renewable energies in Germany recorded a turnover of about 29 billion €. The number of people employed in this sector reached 278,000 – this is equivalent to a 73 % increase since 2004. In 2008 renewable energies contributed to climate protection with CO₂ savings of about 112 million tonnes. Current figures show that renewables already pay off for Germany's national economy: for every Euro of funding, arising from the Renewable Energy Sources Act, 1.24 € is saved on fossil energy imports and on prevention of external environmental damage caused by other energy sources (2008).

The Energy and Climate Programme of the Federal Government (launched in August 2007) aims at increasing the share of renewables in electricity supply up to 30 % and in heat consumption up to 14 %. In the course of the further development of its biomass strategy the Federal Government has revised the original goal of expansion for biofuels. In the year 2020 the target now is 12 % instead of 17 % (by energy content). Following the main guiding principles “security of supply”, “economic efficiency” and “environmental protection” the programme contains of about 30 key elements including a package of different acts and ordinances. Offering incentives for modernisation and technological innovation the programme aims at stepping up the number of jobs within the renewable energy sector to 400,000 by 2020.

Some examples of measures with specific incentives for renewables:

- The government’s goal is to increase the share of renewables within the electricity sector significantly. An amendment of the Renewable Energy Sources Act ¹, which among other things contains new provisions for regulating tariffs for biomass, serves this goal.
- Obligations to use renewables in new buildings are laid down in the Renewable Energies Heat Act ². All owners of newly erected buildings are obliged to use a certain amount of renewables for their heat requirements (solar radiation, geothermal energy, ambient heat or biomass). For example, the use of biomass has to cover at least 50 % of the new building’s heat demand. However, pellets, wood chips and fuelwood may only be used in furnaces which comply with strict national provisions on air quality control and have a particularly high boiler efficiency factor. Alternatively it is possible to improve insulation of buildings, obtain heat from district heating systems or use heat from combined heat and power generation (CHP).
- Since the Federal Market Incentive Programme for renewable energies was launched in 2000 it has provided financial support amounting to 1.07 billion €, which in turn triggered investments of 8.8 billion €.
- New Sustainability Ordinances for biofuels and electricity from biomass shall ensure that when producing biomass for biofuels and electricity, a minimum requirement for sustainable management of resources and for the conservation of natural habitats are complied with. Furthermore the entire production, processing and supply chain must show a certain potential for reducing greenhouse gases.

¹ Act in Granting Priority to Renewable Sources – “Act on the Priority of Renewable Energies of 25 October 2008 (Federal Law Gazette I, p. 2074), which was amended by Article 3 of the law of 29 July 2009 (Federal Law Gazette I, p.2542)“

² Act on the Promotion of Renewable Energies in the Heat Sector – “Act on the Promotion of Renewable Energies in the Heat Sector of 7 August 2008 (Federal Law Gazette I, p. 1658), which was amended by Article 3 of the law of 15 July 2009 (Federal Law Gazette I, p. 1804)“

- The Act on Combined Heat and Power Generation ³ and a draft ordinance for small and medium combustion installations in order to reduce particulate emissions are additional examples for improvements of framework conditions for renewables.
- The German National Biomass Action Plan, which outlines measures for the expansion of bioenergy, is expected to indirectly influence the future development of the German wood energy market, even though it is not legally binding.

The Energy and Climate Programme initiative doubles Germany's previous climate protection efforts. At present, an 18 % reduction in greenhouse gas emissions has been achieved compared to 1990. The realisation of this programme will enable a reduction of around 36 % (almost 220 million tonnes CO₂). Thus a major step has been taken towards achieving the climate protection target of minus 20 % by 2020.

Wood for energy is one major contributor to this success. In the previous years, the use of wood for energy generation in Germany has developed continually and received extraordinary impetus due to the huge increases in oil and gas prices. For example heating with CO₂-neutral wooden pellets has increasingly become a cost-effective alternative to conventional fuels. In the period up to 2002, wood consumption for energy purposes by private and commercial demanders increased at a moderate rate. After that, there was a sharp rise in consumption which bottomed out in 2008 at about 53 million m³. Fuelwood consumption in private households formed the largest group of demanders (25.2 million m³). They were followed by large biomass thermal power plants (19.8 million m³). While private households mainly take fuelwood from forests (70%), large biomass thermal power plants mostly use recovered wood and industrial wood residues (about 72%).

German producers of wood pellets also benefited from this development. Producing 0.3 million tonnes in 2005 (of which domestic consumption: 0.2 million tonnes) it was possible to increase production and domestic consumption in 2008 to 1.5 million tonnes and 0.7 million tonnes, respectively. In 2009 pellet production in Germany may reach a level of 1.6 million tonnes. So far main raw material sources for pellet production are wood residues originating from softwood sawmills. In future, additional sources may become important (e.g. residues from forests, fast growing species, hardwood species).

Due to the effects of the current economic crisis (e.g. production cuts in several industry sectors) fuelwood consumption in Germany is expected to stagnate in 2009 and to further increase in 2010.

³ Act on Combined Heat and Power Generation – "Act on Combined Heat and Power Generation of 19 March 2002 (Federal Law Gazette I, p. 1092), which was amended by Article 5 of the law of 21 August 2009 (Federal Law Gazette I, p. 2870)"

b) Construction sector most important for material use of timber

There is an urgent need for incentives in the whole construction sector. In the first half of 2009 turnover of German building industry dropped by 8.4 % to 34 billion €. The building sector is most important for wood consumption, for in Germany almost 2/3 of removals are transformed in products designed for the building sector. After a continuous rise since 2002 timber consumption for material use bottomed out in 2007 at a level of 74 million m³ and then dropped to about 72 million m³ in 2008.

Discussions on climate protection, energy saving and mitigating climate change are increasingly focussing on building sector, which is responsible for almost 40% of energy consumption in Europe. In Germany there are about 18.8 million buildings, of which 8 % are non-residential. This means a huge dormant potential to be mobilised. Action has been taken about 30 years ago (1978) when the first German Thermal Insulation Ordinance entered into effect. Since then the energy efficiency of buildings has been improved step by step, latest amendment of this Ordinance came into effect beginning this year.

Nevertheless we are still far away from where we would like to be, because about 73 % of buildings in Germany were constructed before 1978. They still do not meet any energy saving requirement. But building owners and tenants increasingly realise that energy saving is not only an environmental issue but also most interesting in economic matters. For example cost for heating and hot water make up around 87 % of total energy consumption of private households. As we know today 80 % of those costs could be saved by professional refurbishment like improvement of building shell and modern building services.

Against this background the Federal Government became active to mobilise investments and to accelerate the process by different means. Important incentives for investments in the building sector are the above mentioned Renewable Energy Heat Act and the current development of a new Green Building Certificate in close cooperation with science and interested associations (“round tables” with about 130 participants). First German Sustainability Certificates have been granted to 16 office buildings in January 2009 (link to the German Green Building Certification System: www.dgnb.de).

Ecological advantages of sustainable wood products (e.g. CO₂-neutral) may open up new perspectives within the building sector, especially by modernisation and renovation. Funding from the government support programme for existing buildings will increase from 130 million € (2005) to 350 million € in 2008, up to 400 million € in 2009 and up to 500 million € per annum between 2010 and 2012. But low-energy buildings (below 50 kWh/m² a) or so-called

“passive houses” (producing more energy than needed) are in general independent from construction material. This means intensified competition between construction materials.

c) Carbon markets

Within the scope of the Kyoto Protocol (KP), the Federal Government of Germany decided at the end of 2006 to take advantage of the Forest Management option. This means that changes in carbon stocks brought about by sustainable forest management in already existing forests are accountable under Kyoto Protocol Article 3.4; final calculations are made at the end of the commitment period in 2012. It is at any rate compulsory to account for increases in stocks brought about by afforestation (KP Art. 3.3).

During the first commitment period, the amount of carbon that is accountable under KP Art. 3.4 is subject to country-specific limits. For Germany, this limit is 1.24 megatonnes C per year (corresponding to 4.55 megatonnes CO₂ per year and 22.73 megatonnes CO₂ for the whole commitment period). In 2007, the national inventory report predicted a total increase in carbon stocks of 79.4 megatonnes CO₂ (= 21.65 megatonnes C). Between 1990 and 2002 the sink strength amounted to 76 megatonnes CO₂ per year. The accountability limit also includes possible changes in carbon pools due to forest management under the Joint Implementation (JI, KP Art.6) arising due to forest management activities with German participation in other Annex I states.

d) Forest certification and certified forest products markets

So far more than 70 % of the total Forest area in Germany (11.1 million ha) has been voluntarily certified, including 7.3 million ha forests certified according to PEFC-criteria (Programme for the Endorsement of Forest Certification Schemes) and 460,000 ha according to FSC-criteria (Forest Stewardship Council). The Federal Government supports this initiative and is backing the further development, harmonization and mutual recognition of the competing certification systems. It takes the view that wood and wood products may only be procured from stocks with credible certificates.

In 1996 a first government initiative was set up that tropical timber should come from sustainable forestry, attended by credible certification. In 2002 discussions focused on specific procedural requirements to further develop this initiative. In January 2007 the Federal Government has adopted a procurement regime for wood products on federal level. In accordance with this regulation, wood products procured by the federal administration must demonstrably come from legal and sustainable forest management. The bidder has to furnish proof of this by presenting a certificate of FSC, PEFC, comparable certificates or by producing individual

specifications. Comparable certificates or individual specifications are accepted, if the bidder can prove that the criteria of FSC or PEFC applying to the respective country of origin have been met. The regulation is valid for 4 years and will be audited before prolongation.

During 2008 the Federal procurement regime has been implemented at all governmental institutions and subordinated agencies. In the meantime this regime is also assumed on the local level by the Federal States of Baden-Württemberg, Bavaria and the City of Hamburg. Likely Lower Saxony and Berlin will follow soon. Furthermore this regime is approved by the "Deutsche Bahn AG" corporation, the German Federal Agency for Technical Relief as well and several municipal administrations and public institutions. At present they are the main drivers and play an exemplary role to give incentives for the economic and private sector concerning purchase and use of certified timber and wood-based products.

Meanwhile 6 EU member states developed and implemented similar national regimes. End of 2008 the EU Standing Forestry Committee established a working group for a two year period with regard to exchange of knowledge and experience as well as potential harmonization.

e) Sustainable and legal wood trading policies

An important initiative on international level is the EU FLEGT (Forest Law Enforcement, Governance and Trade) Action Plan on Illegal Logging, representing a joint action programme against illegal logging. This means that an important first step has been taken towards improved control of timber imports. The Federal Government is backing preparations and negotiations with potential candidate countries of voluntary FLEGT partnership agreements with the EU. Work on improved methods for timber origin identification to be used by enforcement agencies continues.

The EU FLEGT approach will be supplemented by a Regulation of the EU Parliament laying down the obligations of operators who place timber and timber products on the market. The EU Commission drafted this regulation in October 2008, which is to contribute effectively to combating illegal logging and associated trade at the global level. The regulation commits operators who place timber and wood based products on the market to furnish proof of legality by verification through an independent accredited organization, means of other accepted proof and the application of due diligence systems. The regulation is at present negotiated in the EU Parliament. The German Government supports this approach and is active player within the development of this regulation.

3. Wood raw material, mobilisation and forest products markets

Timber is not the only forest product society is asking for. There are increasingly competing demands arising for example from environmental requirements (e.g. biodiversity) or recreational functions of forests. In future different priorities how to deal with forest functions may cause certain conflicts between interest groups. This development calls for a coherent strategy how to meet best those different requirements with special emphasis on wood production and the existing timber potential.

Growing wood demand for both material and energy utilisation has led to an increased mobilisation of timber and biomass inside and outside of forests. Although it is generally up to the markets to balance demand and supply, the Federal Government is recognising the difficulties for example in mobilising timber from small scale forest enterprises and thus exploring means to increase domestic supply. One important instrument is the elaboration of a German cluster initiative in order to evaluate how to intensify sustainable wood supply and regional cooperation within forestry and forest-based industry. Against this backdrop the Federal Government is about to elaborate a “German Forest Strategy 2020” aiming at enhanced timber production without jeopardising other important forest functions regarding nature, water or recreation.

a) Roundwood markets

After the severe storm “Lothar” in December 1999, which concentrated in the Southwest (35 million m³ forest damage), another hurricane called “Kyrill” swept over central parts of Germany in January 2007 causing again considerable damage in the forests (37 million m³). In total, about 50 % of normal annual removals in Germany have been thrown. Due to the considerable percentage of broken trees (approx. 25 %) only a certain share of wind thrown timber was able to reach timber markets. This situation opened up new perspectives to feed energy markets with wood residues which were not suitable for material use. Additionally, forest owners in less affected areas should support market stabilisation by voluntarily reducing removals and finally there has been no significant indication of upcoming bark beetle disease.

Thus the Logging Restriction Ordinance has not been put into effect. Necessary action to overcome the disaster concentrated on other activities proved to be successful in the past (e.g. easements in taxes, facilitation of transports, financial aid). Although there has been an additional storm event in early 2008 (“Emma”) with the effect of nearly 5 million m³ of wind-throw in Germany, markets have been able to absorb most of the timber. Depending on the region, price-levels lowered by a total of some 15 to 25 % (softwood).

As a result of “Kyrill”, a total amount of 76.7 million m³ of roundwood was put on the market in 2007 (23.1 % more than in the previous year). Compared with the average amount of fellings over the last 10 years (47.5 million m³), this was an increase of 61 %. Of this amount, softwood felled by the storm accounted for 83 %, with spruce trees making up 66 %. According to official statistics, in 2008 only 55.4 million m³ were felled. Of the total fellings, spruce accounted for 57 %, pine for 20 %, beech for 19 % and oak for 4 %. One of the reasons for the reduction between 2007 and 2008 was the reduction of roundwood demand for material use in the second half of the year. Furthermore, regular felling in areas damaged by storms was reduced. In addition, it can be assumed that as a result of storm damage, stocks were increased.

Comparing the development of felling in recent years with German forest resource assessment data (WEHAM) clearly show that potential coniferous wood resources, and in particular potential resources of spruce, were largely exhausted while in hardwood there is still considerable untapped potential. In the long term, it is assumed that the roundwood demand in Germany will continue to increase. Various supply options are therefore being discussed (e.g. mobilisation of existing resources, imports, short-rotation plantations on farmland).

The extent of the impact of nature conservation policy objectives and their implementation on the future availability of domestic roundwood remains uncertain. For example, the (legally non-binding) Federal Government’s National Strategy on biological diversity aims, by 2020, to set aside 5 % of the forest area to develop naturally, and to continuously reduce the percentage of non-indigenous tree species. Moreover, possible management restrictions have to date not been implemented in the German FFH sites (92/43/EEC Fauna-Flora-Habitat Directive), in which approximately one fifth of the German total forest area is located.

b) Sawnwood (softwood and hardwood)

In 2008, approximately 11,500 people were employed in the German sawmilling industry⁴. The total turnover amounted to 3.4 billion € (change from previous year: -10.6 %). With an export quota of 37.5 %, the export turnover amounted to 1.3 billion €. The euro zone accounted for 1.1 billion € and countries outside the euro zone accounted for 0.2 billion €. Compared with 2007, the entire export turnover decreased by 14.7%.

Domestic production of sawn softwood decreased by approximately 10 % in 2008 compared with 2007. Declines in imports, exports, and the apparent consumption of sawn softwood were also recorded. In 2008, export-driven producers of sawn softwood were hit especially

⁴ Companies with 50 or more employees (“20.10 sawmilling, planning, and wood preservation plants”)

hard by the financial and housing crisis. The consumption of logs (softwood, temperate and tropical hardwood) in the German sawmilling industry amounted to 42.5 million m³ in 2008. Just as in the case of the sawn softwood, German imports, exports, production and apparent consumption of temperate and tropical hardwood underwent a decline. Since January 2009 turnover of German sawmilling industry dropped by 21.5 % to 1.4 billion €.

d) Wood-based panels (particle board, fibreboard, MDF, OSB, plywood)

In 2008, the German panel industry ⁵ employed approximately 15,000 people and recorded a total turnover of 5.1 billion €. Compared with 2007, the total turnover decreased by 9.1 %. The export quota of the panel industry amounted to 34.7 %. Of this, the euro zone accounted for 0.9 billion € and countries outside the euro zone accounted for 0.8 billion €. Compared with 2007, the total export turnover decreased by 12.3 %. The annual wood consumption of German panel industry amounted to 16.5 million m³. In the first half of 2009 the sales of German panel industry dropped by 22.1 % to 2.1 billion €.

e) Value-added wood products

In 2008 the annual sales of German woodworking (e.g. prefabricated houses, construction elements, wood-based materials) and furniture industry amounted to 31.2 billion € (+ 1.6 % against 2007). Regarding 2009 turnover of this industry sector is estimated to decrease significantly by 12 to 13 %. At present, about 157,000 people (- 3.5 % against previous year) are employed in 1,030 companies (category “50 and more employees”).

In spite of problems within the building sector there is a sustained trend in favour of timber construction. During the last decade the market share of timber construction in non-residential buildings rose from 13 % to nearly 17 % (market share of timber construction in residential sector: about 14 %). The share of refurbishment in carpentry turnaround improved significantly from 37 % (2005) to 40 % in 2007.

Germany belongs to the world’s most important producer countries of furniture. Currently, 553 furniture companies employ 91,800 people (- 2.6 %). In the first half of 2009 the turnover of German producers fell by 13.8 % to 7.6 billion € compared with the respective period 2008. Actually the furniture industry is hoping for an end to the lull due to an increased entry of orders and certain signs of improvements in the development of furniture trade.

⁵ Companies with 50 or more employees (“20.20 Production of veneer sheets, plywood board, fibreboard, and particle board”).

f) Pulp and paper

In 2008, the German pulp and paper industry ⁶ employed about 40,000 people and recorded a total turnover of 16 billion € (compared with 2007: -2.8 %). Turnover of this industry sector in the first half of 2009 decreased by 14.6 %. With an export quota of 52.2 %, the export turnover amounted to approximately 8.3 billion €. Of this, the euro zone accounted for 4.3 billion € and countries outside the euro zone accounted for 4.0 billion €. Compared with 2007, the total export turnover decreased by 4.4 %. Wood consumption by German pulp and paper mills was estimated to 10.3 million m³ in 2008.

⁶ Companies with 50 or more employees (“21.1 Production of wood pulp, pulp, paper, card, and cardboard“)



TC1

UNECE TIMBER COMMITTEE FORECASTS Roundwood

Country: Germany	Date: 04.09.2009
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Product Code	Product	Unit	Historical data		Revised	Estimate	Forecast
			2007	2008	2008	2009	2010
1.2.1.C	SAWLOGS AND VENEER LOGS, CONIFEROUS						
	Removals	1000 m ³	42.802	37.000	27.397	29.000	30.000
	Imports	1000 m ³	3.282	2.054	2.604	2.000	2.200
	Exports	1000 m ³	4.629	3.275	4.454	4.000	4.200
	Apparent consumption	1000 m ³	41.455	35.779	25.547	27.000	28.000
1.2.1.NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS						
	Removals	1000 m ³	3.998	4.000	3.844	3.600	3.700
	Imports	1000 m ³	131	145	270	300	300
	Exports	1000 m ³	938	760	1.108	900	1.000
	Apparent consumption	1000 m ³	3.191	3.385	3.006	3.000	3.000
1.2.1.NC.T	of which, tropical logs						
	Imports	1000 m ³	106 #	66	66	60	60
	Exports	1000 m ³	26 #	9	9	10	10
	Net Trade	1000 m ³	80	58	58	50	50
1.2.2.C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS						
	Removals	1000 m ³	13.548	9.243	9.243	9.000	9.250
	Imports	1000 m ³	898	550	300	250	250
	Exports	1000 m ³	1.487	1.179	1.300	1.250	1.350
	Apparent consumption	1000 m ³	12.959	8.614	8.243	8.000	8.150
1.2.2.NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS						
	Removals	1000 m ³	3.513	3.412	3.412	3.500	3.600
	Imports	1000 m ³	63	39	150	150	150
	Exports	1000 m ³	292	218	480	400	450
	Apparent consumption	1000 m ³	3.284	3.233	3.082	3.250	3.300
3 + 4	WOOD RESIDUES, CHIPS AND PARTICLES						
	Domestic supply	1000 m ³	8.120 C	7.970	7.970	8.000	8.400
	Imports	1000 m ³	4.553	3.094	2.582	2.400	2.500
	Exports	1000 m ³	7.143	5.789	4.754	4.900	5.300
	Apparent consumption	1000 m ³	5.530	5.275	5.798	5.500	5.600
1.2.3.C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS						
	Removals	1000 m ³	2.809	1.637	1.637	1.550	1.600
1.2.3.NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS						
	Removals	1000 m ³	1.359	1.273	1.273	1.150	1.200
1.1.C	WOOD FUEL, CONIFEROUS						
	Removals	1000 m ³	4.454	4.476	4.476	4.700	5.000
1.1.NC	WOOD FUEL, NON-CONIFEROUS						
	Removals	1000 m ³	4.245	4.085	4.085	4.700	5.000

...: keine Angaben möglich; 2007: Endgültige Zahlen; 2008: Vorläufige Zahlen

By e-mail to stats.timber@unece.org. By fax to +41 22 917 0041

Questions? Please contact Alex McCusker at the above address or telephone +41 22 917 2880.

The historical data are from the most recent Joint Forest Sector Questionnaire (blank) or the Timber Committee Forecast (#). For explanations please see These data are flagged with E, R, N or C for secretariat estimate, repeat, national estimate or calculated totals. If there is no flag, this indicates officially sur



TC2
UNECE TIMBER COMMITTEE FORECASTS
Forest products

Country: Germany	Date: 04.09.2009
Name of Official responsible for reply: Birger Rausche	
Official Address (in full): Federal Ministry of Food, Agriculture and Consumer Protection, Rochusstraße 1, D-53123 Bonn	
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E-mail: tb@rausche@bmi.bund.de	

Product Code	Product	Unit	Historical data		Revised	Estimate	Forecast
			2007	2008	2008	2009	2010
	SAWNWOOD, CONIFEROUS						
	Production	1000 m ³	23.922	23.500	21.968	18.500	19.500
	Imports	1000 m ³	4.010	3.400	3.364	3.000	3.000
	Exports	1000 m ³	9.332	9.000	7.765	4.500	5.500
	Apparent consumption	1000 m ³	18.600	17.900	17.567	17.000	17.000
5.NC	SAWNWOOD, NON-CONIFEROUS						
	Production	1000 m ³	1.147	1.100	1.100	800	900
	Imports	1000 m ³	536	460	450	400	400
	Exports	1000 m ³	782	700	644	300	400
	Apparent consumption	1000 m ³	901	860	906	900	900
5.NC.T	of which, tropical sawnwood						
	Production	1000 m ³	44	35	35	35	35
	Imports	1000 m ³	171	152	156	120	100
	Exports	1000 m ³	104	75	78	65	50
	Apparent consumption	1000 m ³	111	112	114	90	85
6.1	VENEER SHEETS						
	Production	1000 m ³	262	217	217	200	210
	Imports	1000 m ³	256	221	154	140	150
	Exports	1000 m ³	175	161	108	100	100
	Apparent consumption	1000 m ³	343	277	263	240	260
6.1.NC.T	of which, tropical veneer sheets						
	Production	1000 m ³	0	0	0	0	0
	Imports	1000 m ³	36	38	38	35	30
	Exports	1000 m ³	20	17	17	15	15
	Apparent consumption	1000 m ³	16	22	22	20	15
6.2	PLYWOOD						
	Production	1000 m ³	235	228	175	160	170
	Imports	1000 m ³	1.018	814	1.174	880	900
	Exports	1000 m ³	282	254	274	190	200
	Apparent consumption	1000 m ³	971	788	1.075	850	870
6.2.NC.T	of which, tropical plywood						
	Production	1000 m ³	2	0	0	0	0
	Imports	1000 m ³	142	115	114	75	80
	Exports	1000 m ³	45	40	35	25	25
	Apparent consumption	1000 m ³	100	75	79	50	55
6.3	PARTICLE BOARD (including OSB)						
	Production	1000 m ³	10.859	10.193	8.529	7.700	7.850
	Imports	1000 m ³	1.648	1.730	1.660	1.500	1.600
	Exports	1000 m ³	3.163	3.200	3.063	2.450	2.600
	Apparent consumption	1000 m ³	9.344	8.723	7.126	6.750	6.850
6.3.1	of which, OSB						
	Production	1000 m ³	1.102	1.000	1.025	950	1.000
	Imports	1000 m ³	305	243	230	230	250
	Exports	1000 m ³	589	560	576	520	550
	Apparent consumption	1000 m ³	818	683	679	660	700
6.4	FIBREBOARD						
	Production	1000 m ³	6.225	5.526	5.526	4.800	5.000
	Imports	1000 m ²	941	726	726	690	730
	Exports	1000 m ²	3.486	3.358	3.358	3.075	3.180
	Apparent consumption	1000 m ³	3.680	2.894	2.894	2.415	2.550
6.4.1	Hardboard						
	Production	1000 m ³	1.790	1.700	1.600	1.500	1.550
	Imports	1000 m ³	246	152	152	140	150
	Exports	1000 m ³	1.632	1.351	1.351	1.200	1.250
	Apparent consumption	1000 m ³	404	501	401	440	450
6.4.2	MDF (Medium density)						
	Production	1000 m ³	4.435	3.826	3.926	3.300	3.450
	Imports	1000 m ³	475	415	415	400	420
	Exports	1000 m ³	1.756	1.925	1.925	1.800	1.850
	Apparent consumption	1000 m ³	3.153	2.317	2.417	1.900	2.020
6.4.3	Insulating board						
	Production	1000 m ³	0	0	0	0	0
	Imports	1000 m ³	220	158	158	150	160
	Exports	1000 m ³	97	82	82	75	80
	Apparent consumption	1000 m ³	122	76	76	75	80
7	WOOD PULP						
	Production	1000 m.t.	3.001	2.903	2.903	2.700	2.850
	Imports	1000 m.t.	5.275	5.124	5.452	5.200	5.300
	Exports	1000 m.t.	982	985	1.008	950	1.000
	Apparent consumption	1000 m.t.	7.294	7.042	7.347	6.950	7.150
10	PAPER & PAPERBOARD						
	Production	1000 m.t.	23.317	22.842	22.842	20.500	21.500
	Imports	1000 m.t.	11.832	11.139	11.139	9.500	10.000
	Exports	1000 m.t.	14.275	13.254	13.254	11.200	11.800
	Apparent consumption	1000 m.t.	20.874	20.727	20.727	18.800	19.700

...: keine Angaben möglich; 2007: Endgültige Zahlen; 2008: Vorläufige Zahlen

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Questions? Please contact Alex McCusker at the above address or telephone +41 22 917 2880.

The historical data are from the most recent Joint Forest Sector Questionnaire (blank) or the Timber Committee Forecast (#). For explanations please see These data are flagged with E, R, N or C for secretariat estimate, repeat, national estimate or calculated totals. If there is no flag, this indicates officially s