

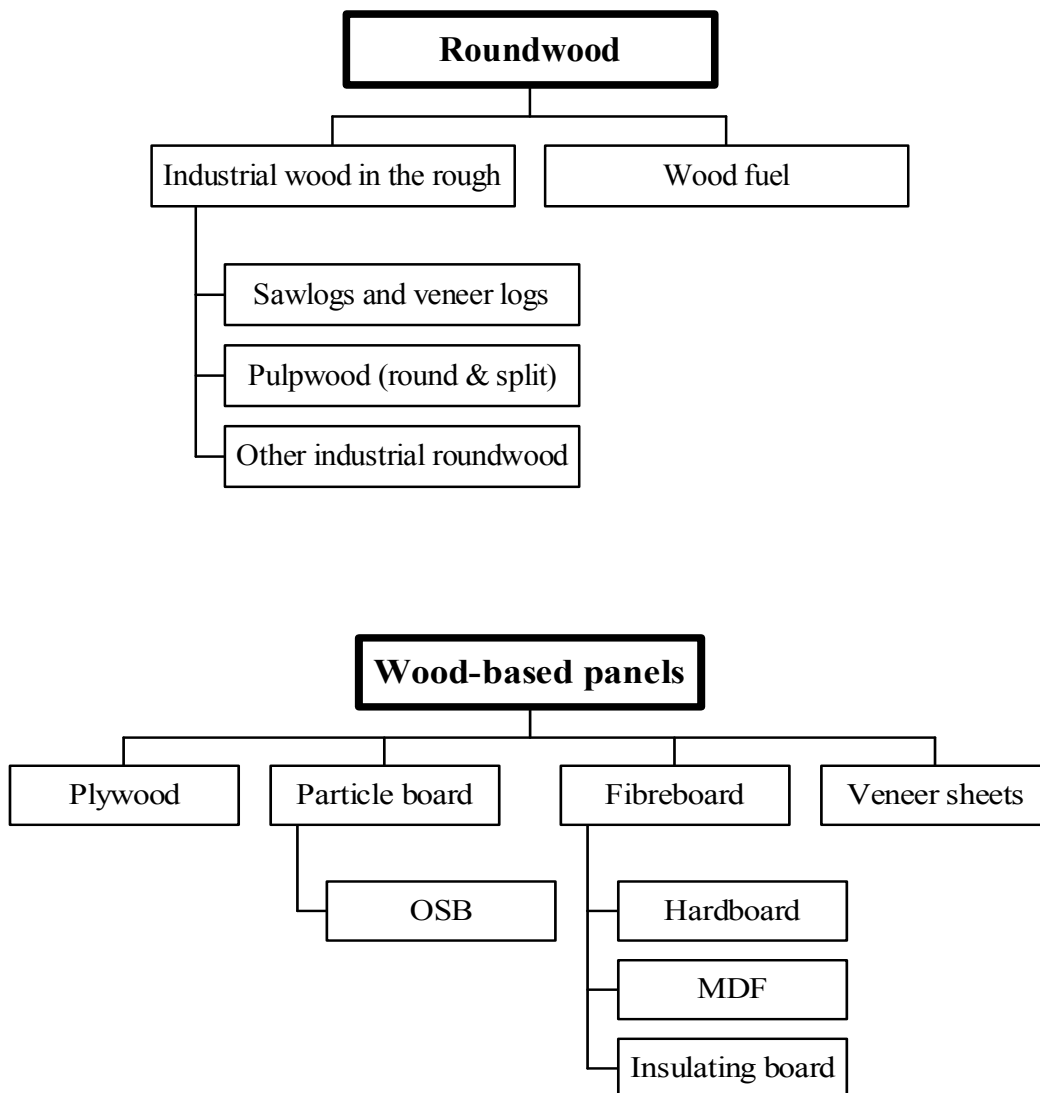
Annexes

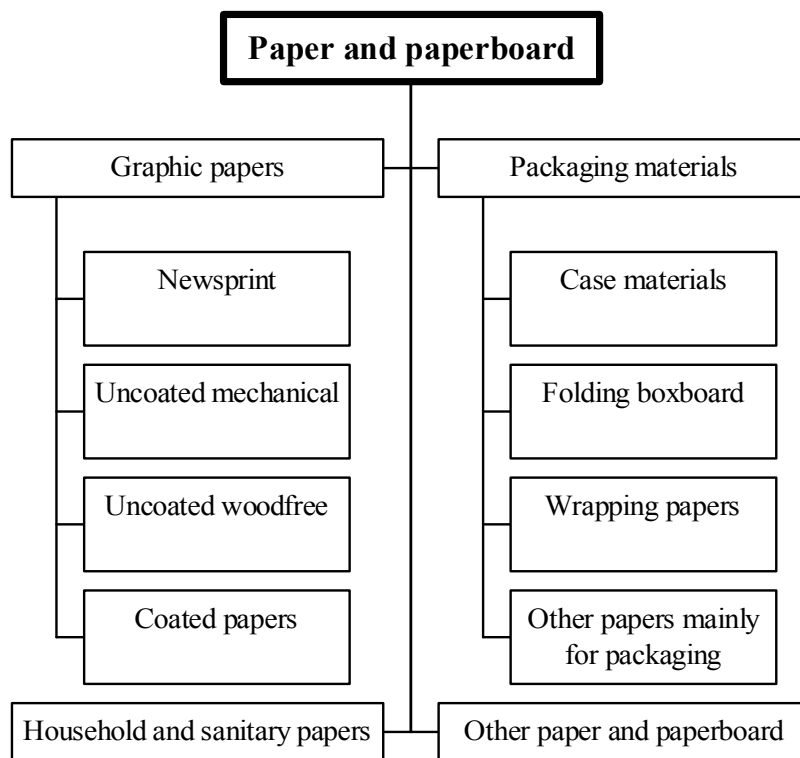
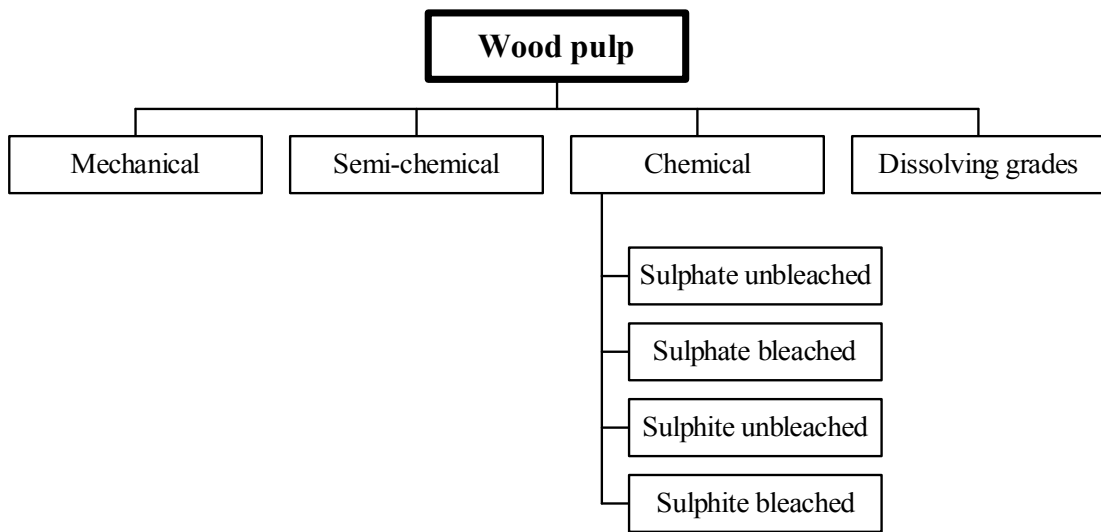
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Components of wood products groups

(Based on Joint Forest Sector Questionnaire nomenclature, 2001)

The important breakdowns of the major groups of primary forest products are diagrammed below. In addition, many sub-items are further divided into softwood or hardwood. These are all the roundwood products, sawnwood, veneer sheets and plywood. Items that do not fit into listed aggregates are not shown. These are wood charcoal, chips and particles, wood residues, sawnwood, other pulp and recovered paper.





Countries in the UNECE region and its subregions



SOURCES OF INFORMATION USED IN THE FOREST PRODUCTS ANNUAL MARKET REVIEW

- APA – The Engineered Wood Association, United States, (www.apawood.org)
- Office National des Forêts, France, (www.onf.fr)
- Bureau of Labor Statistics, United States, (<http://stats.bls.gov>)
- Canadian Standards Association, CSA International, (www.csa.ca)
- Canadian Sustainable Forestry Certification Coalition, (www.sfms.com)
- Council of Forest Industries, Canada, (www.cofi.org)
- Ecosecurities, United Kingdom, (www.ecosecurities.com)
- European Central Bank, (<http://www.ecb.int>)
- European Panel Federation (EPF), (www.europanel.org/)
- European Federation of the Parquet Industry (FEP) (www.parquet.net)
- EUROSTAT – European Union Statistical Office, (<http://europa.eu.int/comm/eurostat>)
- Fédération Nationale du Bois, France, (www.fnbois.com)
- Finnish Forest Industries Federation, (<http://forestindustries.fi>)
- Finnish Forest Research Institute (Metla), (www.metla.fi)
- *Forest Products Journal*, United States, (www.forestprod.org)
- Forest Stewardship Council (FSC), (www.fsc.org)
- *Hardwood Market Report*, United States, (www.hmr.com)
- *hardwoodmarkets.com*, United Kingdom, (www.hardwoodmarkets.com/)
- *Hardwood Review Export*, United States, (www.hardwoodreview.com)
- *Holz-Zentralblatt*, Germany, (www.holz-zentralblatt.com)
- *Import Export Purchasing News*, United States, (www.millerpublishing.com)
- International Monetary Fund, (www.imf.org)
- *International Wood Fiber Report*, United States, (www.pulp-paper.com)
- International Organization for Standardization (ISO), (www.iso.ch)
- The International Tropical Timber Organisation (ITTO), (www.itto.or.jp)
- Jaakko Pöyry Consulting, (<http://consulting.poyry.com>)
- *Japan Lumber Journal*, (www.jlj.gr.jp)
- *Japan Lumber Reports*, (www.n-mokuzai.com/)
- Japan Wood-Products Information and Research Center, (www.jawic.or.jp)
- *La Forêt*, Switzerland, (www.wvs.ch)
- *Le Commerce International du Bois*, France, (www.ifrance.com/cib-ltb)
- L'Echo des Bois, Belgium, (www.echodesbois.be)
- Malaysian Timber Industry Board, Malaysia, (<http://www.mtib.gov.my>)
- *Maskayu*, Malaysia, (www.mtib.gov.my)
- Ministry of Forests, British Columbia, Canada, (www.gov.bc.ca/for)
- Monthly Statistics of Japan, (www.stat.go.jp/english/data/geppou/index.htm)
- National Association of Realtors, United States, (<http://www.realtors.org>)
- Newsprint Data, Canada, (www.cppa.org/)
- *New Zealand Forest Industries*, (www.nzforest.co.nz)
- Programme for the Endorsement of Forest Certification Schemes (PEFC), (www.pefc.org)
- Paperloop.com, United States, (www.paperloop.com)

- *PaperTree Letter*, United States, (<http://wood-info.com/1879.htm>)
- *PIMA - Papermaker Magazine*, United States, (www.pimaweb.com)
- Pulp and Paper Products Council, Canada, (www.pppc.org)
- *Random Lengths Export*, United States, (www.randomlengths.com)
- *Random Lengths Yardstick*, United States, (www.randomlengths.com)
- *Statistische Bundesamt Preise, Reiche 1; Reiche 2*, Germany (www.destatis.de)
- Statistics Canada, Canada, (<http://www.statcan.ca>)
- Swedish National Board for Industrial and Technical Development (NUTEK), (www.nutek.se)
- Swedish National Energy Administration, (www.stem.se)
- Swedish Wood Association, (www.svenskttra.org)
- Swiss Federal Statistical Office, Switzerland (www.statistik.admin.ch/)
- *Timber & Wood Products (TTJ)*, United Kingdom, (www.ttjonline.com/)
- UN Comtrade, United States, (<http://unstats.un.org/unsd/comtrade/>)
- UNECE/FAO TIMBER database, (www.unece.org/trade/timber)
- United States Census Bureau – Department of Commerce, (www.census.gov)
- USDA Foreign Agricultural Service, United States, (<http://ffas.usda.gov>)
- USDA Forest Service, United States, (www.fs.fed.us)
- *Weekly Hardwood Review*, United States, (www.hardwoodreview.com)
- *Wood Based Panels*, United Kingdom, (www.ttjonline.com/)
- *Wood Markets Monthly*, United States, (www.woodmarkets.com)
- *Wood Products Statistical Roundup*, American Forest and Paper Association, United States, (www.afandpa.org)
- WWF – Forests for Life, (www.panda.org/forests4life)
- ZMP – Zentrale Markt- und Preisberichtsstelle für Erzeugnisse der Land-, Forst- und Ernährungswirtschaft GmbH, Germany, (www.zmp.de)

Special chapters in former Forest Products Annual Market Reviews

Note to readers: We have found that some chapters of the *Review* have a longer life than the *Annual Market Review*. The following is a listing of all the special chapters, including their most important sections, in order to give an idea of their contents. Back issues are available on the Timber Committee website or through the secretariat. In 2003 we stopped including special chapters.

Timber Bulletin – Volume LV (2002)

Chapter 3 "Market effects of wood promotion", 11 pages

- Market and market effects
- How to reach market effects by wood promotion
- Wood promotion of recent years is a success story!
- Successful organizations
- Is wood promotion in danger?
- References

Chapter 4 "Trade links strengthening as Turkey's forest sector is modernized. Turkey's forest products markets", 12 pages

- General economic development
- Forest resources
- Institutional framework
- Roundwood market
- Forest products industries
- Foreign trade of wood products
- Wood furniture
- Paper industry
- Prospects for Turkey's wood markets

Chapter 5 "Chile's forest products markets - a plantation success story", 8 pages

- General economic developments
- Forest resources
- Institutional framework for forest and wood industries
- Wood industry – production and consumption
- Trade of wood and wood products
- Prospects for the future of the Chilean wood industry
- Conclusion
- References

Timber Bulletin – Volume LIV (2001)

Chapter 3 "Romania's Forest Products Markets", 12 pages

- General economic developments
- Forest resources
- Institutional framework – forest policy
- The effects of the transition process
- Forest products industry – production and consumption
- Trade of wood and wood products
- Integration into the EU
- Prospects for wood industry

Chapter 4 "Influence on Japanese demand for wood products", 10 pages

- Background
- Wood use trends
- General trends impacting wood use
- Summary
- References

Timber Bulletin – Volume LIII (2000)

Chapter 3 "Effects of the December 1999 storms on European timber markets", 15 pages

- Damage magnitude: the equivalent of 2 years' harvest in 3 days!
- Market effects: potential enormous imbalances mitigated through sector solidarity
- Comparisons with 1990 market effects: similar problems and solutions
- Assistance by governments: quick and multi-dimensional responsiveness
- Positive outcomes?
- Conclusion

Chapter 4 "Poland's forest products markets", 12 pages

- General economic developments
- Forest resources
- Institutional framework for forest and forest industries
- Effects of the transition process
- Integration into the EU
- Forest industry – production and consumption
- Trade of wood and wood products
- Certified forest products
- Prospects for wood industry

Chapter 5 "China's forest products markets", 19 pages

- General socio-economic development
- Forest resources
- Institutional framework
- Analysis and development of production of China's major forest products, 1981 to 1999
- Development of China's forest product trade from 1981 to 1999
- China's forests product trade in 1999
- Consumption of major forest products, with international comparisons
- Projections of demand and supply of China's forest products to 2010

Chapter 6 "Secondary processed wood products markets", 10 pages

- Secondary processed wood products
- Main flows and trade patterns
- Market profiles
- Conclusion

Chapter 11 "Engineered wood products – production, trade, consumption and outlook", 16 pages

- Current market situation
- Production, consumption and trade statistics
- Outlook for EWPs
- Conclusions

Timber Bulletin – Volume LII (1999)

Chapter 3 "Estonia's Forest Products Market", 7 pages

- General economic development
- Forest resources
- Institutional framework
- Forest industry
- Trade of wood and wood products

Chapter 4 "New Zealand's Forest Products Market", 7 pages

- Background to New Zealand's plantation forestry sector
- Market conditions
- Forestry production and trade 1998/1999

Chapter 5 "Trade Restrictions and the Future", 10 pages

- The question of market access
- Trends in tariffs and non-tariff measures
- Trade impediments
- Implications of further trade liberalization

Chapter 6 "Forest Products in the Electronic Market Place", 6 pages

- WWW-sites for forest products trade
- North American and European electronic commerce
- The role of the ECE Trade Division in electronic commerce

Chapter 13 "Tropical Timber Developments", 16 pages, (has since become annual chapter)

- Production, exports, imports
- Tropical timber consumption and price trends
- Strengthening Asian currencies

UNECE/FAO Publications

Timber Bulletin* Volume LVI (2003)

ECE/TIM/BULL/2003/...

1. Forest Products Prices, 2000-2002 (web data release expected March 2004, hard copy expected May 2004).
2. Forest Products Statistics, 1998-2002 (database since 1964 on website, publication available on the web March 2004, hard copy expected April 2004).
3. Forest Products Annual Market Analysis, 2002-2004 (available on web, hard copy expected March 2004).
4. Forest Fire Statistics, 2000-2002 (web data release expected March 2004, hard copy available May 2004).
5. Forest Products Trade Flow Data, 2000-2001 (tables available on web, no hard copy available).
6. Forest Products Markets: Prospects for 2004.

**Timber Bulletin series is currently under review*

Geneva Timber and Forest Study Papers

Forest policies and institutions of Europe, 1998-2000	ECE/TIM/SP/19
Forest and Forest Products Country Profile: Russian Federation (Country profiles also exist on Albania, Armenia, Belarus, Bulgaria, former Czech and Slovak Federal Republic, Estonia, Georgia, Hungary, Lithuania, Poland, Romania, Republic of Moldova, Slovenia and Ukraine)	ECE/TIM/SP/18
Forest resources of Europe, CIS, North America, Australia, Japan and New Zealand	ECE/TIM/SP/17
State of European forests and forestry, 1999	ECE/TIM/SP/16
Non-wood goods and services of the forest	ECE/TIM/SP/15

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Geneva Timber and Forest Discussion Papers (original language only)

Forest Legislation in Europe: How 23 Countries Approach the Obligation to Reforest, Public Access and Use of Non-Wood Forest Products	ECE/TIM/DP/37
Value-Added Wood Products Markets, 2001-2003	ECE/TIM/DP/36
Trends in the Tropical Timber Trade, 2002-2003	ECE/TIM/DP/35
Biological Diversity, Tree Species Composition and Environmental Protection in the Regional FRA-2000	ECE/TIM/DP/33
Forestry and Forest Products Country Profile: Ukraine	ECE/TIM/DP/32
The Development of European Forest Resources, 1950 To 2000: a Better Information Base	ECE/TIM/DP/31
Modelling and Projections of Forest Products Demand, Supply and Trade in Europe	ECE/TIM/DP/30
Employment Trends and Prospects in the European Forest Sector	ECE/TIM/DP/29
Forestry Cooperation with Countries in Transition	ECE/TIM/DP/28
Russian Federation Forest Sector Outlook Study	ECE/TIM/DP/27
Forest and Forest Products Country Profile: Georgia	ECE/TIM/DP/26
Forest certification update for the UNECE region, summer 2002	ECE/TIM/DP/25
Forecasts of economic growth in OECD and central and eastern European countries for the period 2000-2040	ECE/TIM/DP/24
Forest Certification update for the UNECE Region, summer 2001	ECE/TIM/DP/23
Structural, Compositional and Functional Aspects of Forest Biodiversity in Europe	ECE/TIM/DP/22
Markets for secondary processed wood products, 1990-2000	ECE/TIM/DP/21
Forest certification update for the UNECE Region, summer 2000	ECE/TIM/DP/20
Trade and environment issues in the forest and forest products sector	ECE/TIM/DP/19
Multiple use forestry	ECE/TIM/DP/18
Forest certification update for the UNECE Region, summer 1999	ECE/TIM/DP/17
A summary of "The competitive climate for wood products and paper packaging: the factors causing substitution with emphasis on environmental promotions"	ECE/TIM/DP/16
Recycling, energy and market interactions	ECE/TIM/DP/15
The status of forest certification in the UNECE region	ECE/TIM/DP/14
The role of women on forest properties in Haute-Savoie (France): Initial research	ECE/TIM/DP/13
Interim report on the Implementation of Resolution H3 of the Helsinki Ministerial Conference on the protection of forests in Europe (Results of the second enquiry)	ECE/TIM/DP/12
Manual on acute forest damage	ECE/TIM/DP/7

International Forest Fire News (two issues per year)**Timber and Forest Information Series**

Timber Committee Yearbook 2004

ECE/TIM/INF/11

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In an effort to continually improve the UNECE/FAO *Timber Bulletin*, "Forest Products Annual Market Review" readers are encouraged to express their opinions on its content, presentation and distribution. In order to better meet readers' needs, we would like to know more about our readership and their uses of the *Review*. Please fax or e-mail your response to the address below. Thank you.

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The *Forest Products Annual Market Review, 2003-2004* provides a comprehensive analysis of the UNECE region, including the Commonwealth of Independent States, Europe and North America. The *Review* covers forest products from the forest to the final consumer, i.e., from roundwood and primary-processed products to value-added products. Each issue includes extensive statistical information combined with an analysis of trends and developments. Standard statistics-based chapters are presented on sawn softwood, sawn hardwood, wood-based panels, wood raw materials and pulp and paper. Other annual chapters analyze markets for certified forest products, value-added wood products and tropical timber.

This year's *Review* includes a special chapter covering policy implications of market developments. This chapter reviews current policy issues including forest law enforcement and governance, forest certification, climate change, industry competitiveness, wood energy promotion, tariff and non-tariff barriers, phytosanitary regulations, research and development-related policies and the sound use of wood.

The *Forest Products Annual Market Review* and its predecessor publications have been published annually since 1948 by the UNECE/FAO Timber Branch. Its goal is to provide comprehensive statistics and analysis on forest products markets with an emphasis on policy implications. This information is intended for policy makers, researchers, investors and forest products marketing specialists in governments, research institutions, universities and the private business sector. This *Review* is intended for use as a background document for the annual UNECE Timber Committee Market Discussions.

Further information about forest products markets, as well as information about the UNECE Timber Committee and the FAO European Forestry Commission is available on the website www.unece.org/trade/timber. Information about the UNECE may be found at www.unece.org and information about FAO may be found at www.fao.org.