NOTE
The designations employed and the presentation of material in this publication do not imply the expression of any opinion whatsoever on the part of the secretariat of the United Nations concerning the legal status of any country, territory, city or area, or of its authorities, or concerning the delimitation of its frontiers or boundaries.

ABSTRACT
The Forest Products Annual Market Review, 1998-1999 provides general and statistical information on forest products markets in the UN-ECE region of Europe, North America and the Commonwealth of Independent States. The Review begins with a general overview of the forest products markets in the region followed by a description of the economic situation in the region. Four special chapters are included this year: “Forest products markets in Estonia,” “Forest products markets in New Zealand,” “Trade restrictions and their future” and “Forest products in the electronic marketplace.” In addition a new chapter has been added to regularly cover the “Certified forest products marketplace.” The developments in six sectors are described for markets of roundwood, sawn softwood, sawn hardwood, tropical hardwoods, wood-based panels and paper and paperboard, woodpulp and pulpwood. For each sector, production, consumption and trade are considered and relevant material on specific markets is included. Tables included with the text present detailed information and annex tables contain further reference material.

DATA SOURCES
This Review was compiled using data from ECE-region countries responding to a joint FAO/ECE/EUROSTAT/ITTO questionnaire and other data available until the end of May 1999. The authors express their appreciation to contributing countries which included all major ECE-region producers and traders. In light of the problems with reporting intra-European Union trade statistics, UN COMTRADE statistics or estimations of trade provided by the respondents enabled a timely estimation of the 1998 European market. Supplementary data were obtained from industry associations and other sources where official data were lacking.

Additionally a wide range of specialized trade journals were used to supplement information and the authors have tried to give proper citation to them. Country specialists and institutions, including the important statistical contacts, were called upon for additional information. Most of these people are listed below.

The World Wide Web is a growing source of information for the secretariat in producing this Review and the authors appreciate the availability of countries' forest products statistics in this convenient format.
# CONTENTS

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Title</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Preface</td>
<td></td>
<td>x</td>
</tr>
<tr>
<td>Contributors to the publication</td>
<td></td>
<td>xiii</td>
</tr>
<tr>
<td>Explanatory notes</td>
<td></td>
<td>xiv</td>
</tr>
<tr>
<td>Symbols and abbreviations used</td>
<td></td>
<td>xiv</td>
</tr>
<tr>
<td><strong>Chapter 1</strong></td>
<td>OVERVIEW OF FOREST PRODUCTS MARKETS IN 1998 AND EARLY 1999</td>
<td>1</td>
</tr>
<tr>
<td>1.1</td>
<td>ECE region forest product markets developments in 1998 and 1999</td>
<td>1</td>
</tr>
<tr>
<td>1.2</td>
<td>Current trends in the forest and forest industries sector</td>
<td>3</td>
</tr>
<tr>
<td>1.3</td>
<td>Timber committee forecasts</td>
<td>4</td>
</tr>
<tr>
<td><strong>Chapter 2</strong></td>
<td>ECONOMIC FACTORS AFFECTING FOREST PRODUCTS MARKETS</td>
<td>5</td>
</tr>
<tr>
<td>2.1</td>
<td>General economic developments</td>
<td>5</td>
</tr>
<tr>
<td>(ii)</td>
<td>Monetary conditions</td>
<td>8</td>
</tr>
<tr>
<td>(iii)</td>
<td>Exchange rates</td>
<td>8</td>
</tr>
<tr>
<td>(iv)</td>
<td>Commodity and energy prices</td>
<td>9</td>
</tr>
<tr>
<td>(v)</td>
<td>Market economies: situation in summer 1999 and short-term outlook</td>
<td>9</td>
</tr>
<tr>
<td>2.2</td>
<td>Central and Eastern Europe and the CIS</td>
<td>10</td>
</tr>
<tr>
<td>(i)</td>
<td>Development in 1998 and early 1999</td>
<td>10</td>
</tr>
<tr>
<td>(ii)</td>
<td>Short-term outlook for the transition economies</td>
<td>13</td>
</tr>
<tr>
<td>2.3</td>
<td>Developments in the construction sector</td>
<td>14</td>
</tr>
<tr>
<td>(i)</td>
<td>Construction in Europe</td>
<td>14</td>
</tr>
<tr>
<td>(ii)</td>
<td>Construction in North America</td>
<td>15</td>
</tr>
<tr>
<td>(iii)</td>
<td>Construction in Japan</td>
<td>16</td>
</tr>
<tr>
<td>2.4</td>
<td>Recent developments on the furniture markets</td>
<td>17</td>
</tr>
<tr>
<td>2.5</td>
<td>Competition and substitution</td>
<td>17</td>
</tr>
<tr>
<td>2.6</td>
<td>Flooring market</td>
<td>18</td>
</tr>
<tr>
<td><strong>Chapter 3</strong></td>
<td>ESTONIA'S FOREST PRODUCTS MARKET</td>
<td>19</td>
</tr>
<tr>
<td>3.1</td>
<td>General economic developments</td>
<td>19</td>
</tr>
<tr>
<td>3.2</td>
<td>Forest resources</td>
<td>20</td>
</tr>
<tr>
<td>3.3</td>
<td>Institutional framework</td>
<td>21</td>
</tr>
<tr>
<td>3.4</td>
<td>Forest industry</td>
<td>22</td>
</tr>
<tr>
<td>3.5</td>
<td>Trade of wood and wood products</td>
<td>23</td>
</tr>
<tr>
<td>(i)</td>
<td>Pulpwood and sawlogs</td>
<td>24</td>
</tr>
<tr>
<td>(ii)</td>
<td>Sawnwood</td>
<td>25</td>
</tr>
<tr>
<td>(iii)</td>
<td>Wood panels</td>
<td>25</td>
</tr>
<tr>
<td>(iv)</td>
<td>Pulp and paper</td>
<td>26</td>
</tr>
<tr>
<td>(v)</td>
<td>Markets for certified forest products</td>
<td>26</td>
</tr>
<tr>
<td>(vi)</td>
<td>Future developments and perspectives</td>
<td>26</td>
</tr>
</tbody>
</table>
### Chapter 4
#### NEW ZEALAND'S FOREST PRODUCTS MARKETS
- 4.1 Background to New Zealand's plantation forestry sector
  - (i) Indigenous forest
  - (ii) Increasing harvest levels
- 4.2 Market conditions
  - (i) Market overview
  - (ii) Market access
  - (iii) Asian situation
  - (iv) Trade Groupings
- 4.3 Forestry production and trade 1998/1999
  - (i) Roundwood
  - (ii) Sawn softwood
  - (iii) Wood pulp
  - (iv) Paper and paper products
  - (v) Wood panels
  - (vi) Other wood products

### Chapter 5
#### TRADE RESTRICTIONS AND THEIR FUTURE
- 5.1 Introduction
- 5.2 The question of market access
- 5.3 Trends in tariffs
  - (i) Current situation
  - (ii) Future trends in tariffs
- 5.4 Trends in non-tariffs measures (NTMs)
  - (i) Current situation
  - (ii) NTMs which may act as barriers to trade
  - (iii) Some of the NTMs which have most effect on forest products
- 5.5 Future trends in NTMs
- 5.6 Trade impediments
  - (i) Current situation
  - (ii) Future trends in impediments to trade
- 5.7 Where to from here for reductions?
- 5.8 Implications of further trade liberalization

### Chapter 6
#### FOREST PRODUCTS IN THE ELECTRONIC MARKET PLACE
- 6.1 Introduction
- 6.2 What types of sites are available on the WWW for forest products trade?
  - (i) Homepages
  - (ii) Electronic bulletin boards
  - (iii) Interactive forest products trading sites
- 6.3 North American electronic commerce
  - (i) How many forest products companies conduct electronic business in North America
  - (ii) Cost of electronic commerce
  - (iii) Why North American companies are enthusiastic about eBusiness
  - (iv) Impediments to implementation of electronic commerce
- 6.4 Electronic commerce in Europe
- 6.5 The role of the ECE Trade Division in electronique commerce
- 6.6 The future
Chapter 12  CERTIFIED FOREST PRODUCTS

12.1 Introduction ............................................................................................................................................. 105
12.2 What are CFPs? ...................................................................................................................................... 105
12.3 What volume or value of CFPs are traded? ............................................................................................. 105
12.4 Where is the demand for CFPs? ............................................................................................................ 105
(i) Demand in the Netherlands .................................................................................................................. 105
(ii) Demand elsewhere in Europe ................................................................................................................ 106
12.5 What is the supply of the CFPs ............................................................................................................ 106
12.6 What are the potential structural effects in European forest products market? .............................. 107
12.7 Why certify? ........................................................................................................................................... 107
12.8 Why produce and sell CFPs? ................................................................................................................. 108
12.9 What is new in certification systems? .................................................................................................. 109
12.10 Conclusion ........................................................................................................................................... 110

Chapter 13  TROPICAL TIMBER DEVELOPMENTS

13.1 Introduction ........................................................................................................................................... 111
13.2 Production ............................................................................................................................................. 111
(i) Logs .......................................................................................................................................................... 111
(ii) Sawnwood ............................................................................................................................................. 113
(iii) Veneer .................................................................................................................................................. 114
(iv) Plywood ................................................................................................................................................. 114
13.3 Exports ................................................................................................................................................. 115
(i) Logs ..........................................................................................................................................................
(ii) Sawnwood .............................................................................................................................................
(iii) Veneer ..................................................................................................................................................
(iv) Plywood .................................................................................................................................................
13.4 Imports ................................................................................................................................................. 120
(i) Logs ..........................................................................................................................................................
(ii) Sawnwood .............................................................................................................................................
(iii) Veneer ..................................................................................................................................................
(iv) Plywood .................................................................................................................................................
13.5 Tropical timber consumption ............................................................................................................... 123
13.6 Tropical timber price trends ................................................................................................................ 124
13.7 Strengthening Asian currencies .......................................................................................................... 125
13.8 Conclusion ........................................................................................................................................... 126

Annex table 1: Sawn softwood, Apparent consumption ............................................................................... 127
Annex table 2: Sawn hardwood, Apparent consumption ............................................................................ 128
Annex table 3: Particle board, Apparent consumption ............................................................................... 129
Annex table 4: Plywood, Apparent consumption ......................................................................................... 130
Annex table 5: Fibreboard, Apparent consumption ..................................................................................... 131
Annex table 6: Newsprint, Apparent consumption ....................................................................................... 132
Annex table 7: Other printing and writing paper, Apparent consumption .................................................. 133
Annex table 8: Chemical woodpulp, Apparent consumption .................................................................... 134

Some facts about the Timber Committee ................................................................................................. 135

UN-ECE/FAO Publications ......................................................................................................................... 136

Reader Survey .............................................................................................................................................. 138
Table

11.2.1 Production of woodpulp in Europe, the Russian Federation and North America, 1995 to 1998 ................................................. 96
11.3.1 Derived pulpwood requirements in Europe and North America, 1995 to 1998 ......................................................... 98
11.3.2 Derived pulpwood requirements in selected countries, 1995 to 1998 ........................................................... 99
11.3.3 Removals of pulpwood, 1995 to 1998 ........................................ 99
11.3.4 Exports and imports of wood residues, chips and particles, 1995 to 1998 .......................................................... 99
12.4.1 Status of buyers groups in Europe’s largest importing countries, 1999 ......................................................... 106
13.2.1 Tropical forest products production, 1996 to 1998 .......................................................... 112
13.3.1 Composition of exports by producing regions, 1996-1998 ............................................................................ 115
13.3.2 Tropical timber export ratios, 1996-1998 ....................................................................................... 116
13.3.3 Tropical forest products exports, 1996 to 1998 ................................................................................. 116
13.4.1 Decreases in Japanese timber imports in 1998 ............................................................................... 120
13.4.2 Value of some ITTO countries imports of tropical wood products, 1996 to 1997 .......................................................... 120
13.5.1 Tropical forest products consumption, 1997 and 1998 .............................................................................. 123

Graph

Production of woodpulp in Europe, the Russian Federation and North America, 1995 to 1998 ................................................. 96

List of graphs presented in the text

2.1.1 Changes in real GDP, 1994 Q1 - 1998 Q1 ................................................................. 6
2.1.2 Bilateral exchange rates, January 1996 to June 1999 ................................................................. 8
2.1.3 Euro reference rates, January 1996 - June 1999 ................................................................. 8
2.3.1 United States housing starts, 1995 and 1999 ................................................................. 15
2.3.2 Japanese housing starts, 1996 to 1999 ............................................................................. 16
3.1.1 Investments in fixed assets ......................................................................................... 20
3.1.2 Sawmwood production, 1992 to 1998 .......................................................................... 22
3.3.1 Production by company ownership in 1998 ..................................................................... 22
3.3.2 Veneer, fibreboard and particle board production, 1992 to 1998 ........................................... 23
3.4.1 Pulp and paper production, 1992 to 1998 ........................................................................ 23
3.5.1 Export of industrial roundwood .................................................................................. 25
3.5.2 Export of plywood, particle board and fibreboard, 1994 to 1998 ........................................ 25
4.3.1 Log exports to Japan and Korea ..................................................................................... 32
4.3.2 Japanese plywood imports, 1992 to 1997 ........................................................................ 35
7.1.1 FAO/ECE roundwood breakdown .............................................................................. 53
7.1.2 FAO/ECE pulpwood breakdown ................................................................................... 53
7.3.1 Finnish log prices, 1995 to 1999 .................................................................................... 56
7.3.2 German softwood log price indices, 1996 to 1999 ...................................................... 57
7.3.3 German hardwood log price indices, 1996 to 1999 ..................................................... 57
7.3.4 French beech log exports, 1995 to 1998 ......................................................................... 57
7.4.1 United States hardwood log prices, 1995 to 1998 ....................................................... 59
7.6.1 Japanese roundwood imports, 1990 to 1998 ...................................................................... 60
7.4.6 Tropical sawmwood prices, 1996 to 1998 ......................................................................... 63
8.2.1 Sawn softwood consumption, 1994 to 1998 ................................................................. 62
8.4.1 Swedish sawmwood price indices ................................................................................. 65
8.4.2 United States softwood import sources (without Canada) 1998 ........................................... 69
8.4.3 United States sawn softwood import sources from Europe, 1998 ........................................... 69
8.4.4 North American composite sawn softwood price ................................................................. 70
9.2.1 Sawn hardwood consumption, 1994 to 1998 ................................................................. 74
9.4.1 Beech sawmwood exports from France, 1995 to 1998 .................................................... 78
9.4.2 European beech sawmwood price indices, 1996 to 1999 ................................................ 78
9.4.3 United States sawn hardwood exports destinations, 1997 ................................................. 79
9.4.4 United States sawn hardwood exports destinations, 1998 ................................................ 79
9.4.5 United States sawn hardwood prices, 1995 to 1999 ................................................................. 80
Graph

10.2.1 Consumption of particle board, 1994 to 1998 ................................................................. 87
10.3.1 North American structural panel composition, 1996 to 1999 ........................................... 87
10.4.1 Consumption of plywood, 1994 to 1998 ............................................................................. 88
10.5.1 Consumption of fibreboard, 1994 to 1998 .......................................................................... 90
11.2.1 Swedish export price for chemical pulp, 1996 to 1999 ..................................................... 95
11.2.2 Import price index for chemical pulp in Germany, 1996 to 1999 ....................................... 95
11.2.3 Prices of old corrugated containers and waste paper in the United States, 1996 to 1999 .... 97
11.3.1 Pulpwood prices in Germany, 1995 to 1999 ..................................................................... 100
11.3.2 Pulpwood prices in Finland, 1995 to 1999 ........................................................................ 102
11.3.3 Pulpwood prices in Austria .................................................................................................. 102
11.3.4 Export unit price of chips from British Columbia, 1995 to 1999 ......................................... 102
11.3.5 Swedish prices for wood energy .......................................................................................... 103
12.5.1 Estimated potential production of FSC-certified roundwood, 1999 .................................. 107
12.8.1 Acceptance of premium CFPs, 1998 .................................................................................. 108
13.2.1 Major tropical log producers, 1996 to 1998 ..................................................................... 112
13.2.2 Major tropical sawnwood producers, 1996 to 1998 .......................................................... 113
13.2.3 Major tropical veneer producers, 1996 to 1998 ................................................................. 114
13.2.4 Major tropical plywood producers, 1996 to 1998 ............................................................ 114
13.3.1 Major tropical log exporters, 1996 to 1998 ...................................................................... 117
13.3.2 Major tropical sawnwood exporters, 1996 to 1998 ........................................................... 118
13.3.3 Major tropical veneer exporters, 1996 to 1998 ................................................................. 119
13.3.4 Major tropical plywood exporters, 1996 to 1998 ............................................................ 119
13.4.1 Imports of tropical wood products, 1994 to 1998 ............................................................. 120
13.4.2 Major tropical log importers, 1996 to 1998 ..................................................................... 121
13.4.3 Major tropical sawnwood importers, 1996 to 1998 .......................................................... 122
13.4.4 Major tropical veneer importers, 1996 to 1998 ................................................................. 122
13.4.5 Major tropical plywood importers, 1996 to 1998 ............................................................ 123
13.5.1 Consumption of tropical wood products, 1994 to 1998 ..................................................... 124
13.6.1 Tropical log price, 1997 to 1999 ......................................................................................... 124
13.6.2 Tropical sawnwood prices, 1997 to 1999 .......................................................................... 124
13.6.3 Tropical plywood prices, 1997 to 1999 ............................................................................. 125
13.7.1 Trends in exchange rates for Asian currencies, 1998-1999 .............................................. 125
13.7.2 Currency fluctuations for Asian currencies, 1998-1999 .................................................. 126
PREFACE

The ECE/FAO Forest Products Annual Market Review, 1998-1999 provides a statistical analysis and general information on forest products markets in the UN-ECE region, including Europe, North America and the Commonwealth of Independent States, for the period beginning 1998 through mid 1999. The Review serves as a background document for the ECE Timber Committee’s annual market discussions which will be held on 28 September, 1999. Furthermore it provides readers with comprehensive analysis on recent developments in the forest and forest product sector in the ECE region as well as in other regions important for the ECE region trade.

The Review begins with an overview of the forest products markets, followed by a general appraisal of economic conditions which have directly or indirectly influenced ECE region markets. This economic chapter ends with an analysis of demands for wood and wood products and their substitutes from housing construction and related furniture and flooring demand. In-depth discussion of sector developments follows for roundwood, sawn softwood, sawn hardwood, wood-based panels, woodpulp, pulpwod and paper as well as tropical timber markets. A new regular chapter discusses markets for certified forest products – a new market sector covered in the annual Timber Committee discussions.

Four special chapters are included in this year’s Review: “Estonia’s forest products markets”, “New Zealand’s forest products markets”, “Trade restrictions and their future” and “Forest products in the electronic marketplace.” The chapter on Estonia’s markets is the first of a new addition to the Review, that is, a focus on one ECE region country. The authors of the Review extend their gratitude to Mr. Erik Kosenkranius, Director, Estonian Department of Forestry, for authoring this enlightening chapter.

“New Zealand’s forest products markets,” is the first of a new annual series of chapters in the Review to highlight an important forest products trading country from outside the ECE region. As forest products are increasingly traded globally, competition for markets is no longer regional and is influenced greatly by countries which have fast-growing forest resources such as New Zealand. We thank Messrs. John Eyre and James Barton, New Zealand Ministry of Agriculture and Forestry, the authors of this special chapter.

“Trade restrictions and their future” was written by Dr. I. J. Bourke, Senior Forestry Officer, FAO Forestry Department. This timely chapter is an excellent introduction to the Timber Committee’s special topic discussion at this year’s session on “trade and the environment.” We would like to express our gratitude to him for this comprehensive description of the tariff and non-tariff barriers affecting forest products trade worldwide.

The last special chapter, “Forest products in the electronic marketplace” describes the new marketing channel using the Internet and its prospects in the future.

Regular readers of the Review will notice that tropical timber is treated differently than in the past. Formerly tropical timber markets had been analysed in the hardwood chapter. Last year part of the tropical timber market was reported under a special chapter on “The effects of the Asian crisis on forest products markets in the ECE region” while the rest was treated under the hardwood chapter. This year the follow-up of the Asian crisis and discussion of the tropical timber markets are the subject of a new chapter written by Drs. Steve Johnson and Michael Adams of the International Tropical Timber Organisation. The authors of the Review appreciate this co-operative effort and the ITTO expertise.

The sources of information for this Review are mainly the responses to a new questionnaire sent out jointly by the ECE Timber Section, the FAO Forestry Department, EUROSTAT and ITTO. National correspondents from the 55 countries in the ECE region received the questionnaire and the tables and graphs result directly from their statistics. The secretariat acknowledges their important and timely work in supplying 1998 statistics following the first quarter of the year. It should be mentioned that some national correspondents had to make estimates for unavailable or partial statistics. We sincerely appreciate the extra effort made by some statisticians to supply advance data. All correspondents had the ability to revise former statistics for 1997 and thus there may be small differences in regional totals from the last Review.
In addition to the primary data, the Review is based on a wealth of secondary data obtained through trade journals, trade associations, annual reports, and other printed sources. In other words, many important statistics and ideas and other information came from trade journals and in such cases the secretariat does not claim originality. Attempts were made throughout the Review to appropriately cite sources of printed information and the authors did not intentionally leave out any sources. Readers’ suggestions for additional sources of information are welcome. Sometimes we have quoted sources that are quoted by another journal or website — we would be especially grateful for direct links to some of these sources.

Increasingly valuable market information is available on the World Wide Web and we thank the generous contributors who upload information for international use. The Timber Section has established a Market Information System on the Timber Committee website and aside from publications like this Review, the site will be gradually developed with important links to more market information. Readers’ suggestions of additional web sources are welcome.

Another important source of information comes from the individual contributors to the review who are listed separately. The authors sincerely appreciate their contributions and regret if anyone was unintentionally left off the list.

We apologise to those readers who relied on a paper copy, or on a version in French or Russian, in preparation of the Timber Committee. The document was completed late which delayed translation, printing, duplication and distribution. We hope that those delegates who have the electronic version in August 1999 find this method of distribution agreeable.

We would like your feedback on this Review and its improvements from previous reviews. A simple reader survey is attached at the end which can either be returned by fax or e-mail. An ongoing user survey has documented that changes to the Review’s layout and content have been appreciated by readers, but additional improvements are possible.

The Review will be complemented in October 1999 by the Timber Bulletin issue No. 6, Forest Products Markets in 1999 and Prospects for 2000, which will contain the results of the Timber Committee’s market discussion. All statistics collected in the new joint ECE/FAO/EUROSTAT/ITTO questionnaire are presented systematically in issue No. 2, Forest Products Statistics, 1994-1998. The other issues of the Timber Bulletin are listed at the end of the Review.

This publication is available on the Timber Committee website at: http://www.unece.org/trade/timber. Eventually the site will include the statistical database, TIMBER, used in the Review. Until then, the database is available from the secretariat.

Mr. Claude Huysbrechts, who was the Timber Section statistician for over 20 years, has retired. However his legacy lives on as the TIMBER database, which he created, was updated and used for this Review. Readers familiar with past Reviews will also notice that the graphics and tables in this year’s Review have a new look as a result of more advanced desktop publishing techniques. The secretariat would like to express its gratitude to Messrs. Topi Sarpakunnas and Petteri Vuorinen, forest products marketing graduate students at University of Helsinki, who were interns with the Timber Section during the production of the Review. Our experience of engaging interns during the production of the publication, which has grown enormously in scope and time, has been extremely positive and prospective interns are encouraged to apply to work with the secretariat.
The Review is produced as a joint effort by the Geneva Timber Section and Ed Pepke led and coordinated the work. The individual chapters had the following principal authors: 1. Ed Pepke; 2. Kit Prins (drawing on the Economic Survey of Europe prepared by the Division of Economic Analysis of ECE); 3. Erik Kosenkranius (Estonia); 4. John Eyre and James Barton (New Zealand); 5. I.J. Bourke (FAO, Rome); 6. Ed Pepke; 7. Kit Prins; 8. Ed Pepke; 9. Ed Pepke; 10. Jorge Najera; 11. Kit Prins; 12. Ed Pepke; 13. Steve Johnson and Michael Adams. Messrs. Topi Sarpakunnas and Petteri Vuorinen produced all the graphics and were assisted by Ms. Sefora Kifle. Mr. Philippe LeMay-Boucher was responsible for preparation, formatting, integration and presentation of the text, tables and graphs. Mlle. Claire Pages produced the statistics tables. This manuscript was completed on 6 August 1999. More information may be obtained by contacting:

Ed Pepke  
Forestry Officer--Marketing  
Timber Section  
UN/ECE Trade Division  
Palais des Nations  
CH - 1211 Geneva 10, Switzerland  
Tel. + 41 22 917 2872 or 917 1234  
Fax: + 41 22 917 00 41  
info.timber@unece.org
CONTRIBUTORS TO THE PUBLICATION

The secretariat would like to express its appreciation for the information received from the following people in preparation for the Forest Products Annual Market Review. The base data were supplied by country correspondents, who are acknowledged by name in the companion issue of the Timber Bulletin "Forest Products Statistics, 1994-1998." We regret any omissions.

Michael Adams, International Tropical Timber Organisation
Martti Aarne, Finnish Forest Research Institute
George Barrett, Hardwood Publishing Co.
Scott Berg, American Forest & Paper Association
Eric Boilley, Fédération française des Bois Tropicaux et Américains
Michael Buckley, American Hardwood Export Council
Jim Bourke, FAO
Jorge Casquilho, European Paper Industry Confederation
Centro Studi Industria Leggera (CSIL), Italy
Dave Darr, USDA Forest Service
Pierre-Marie Declos, Consultant
Katarina Ekberg, Swedish National Forestry Board
Jean Fayes, European Organisation of the Sawmill Industry
Keith Forsyth, LTS, International
Alfonso Froncillo, Federazione Nazionale dei Commercianti del Legno
Miroslav Gecovic, Slovakian Forest Research Institute
Bruce Hansen, USDA Forest Service
Hermann Huckert, Federal Ministry of Food, Agriculture & Forestry
Peter Hvid, Special, Danish Ministry of Environment and Energy
Peter Ince, USDA Forest Service, Forest Products Laboratory
Steve Johnson, International Tropical Timber Organisation
Pekka Kallio-Mannila, Finnish Forest Industries Federation
Hikojiro Katsuhisa, Japan Wood-Products Information and Research Center
Eric Kosenkranus, Estonian National Forestry Board
Giedrius Leliuga, Lithanian Center of Forest Economics
Mike Long, Ohio Division of Forestry
Bill Luppold, USDA Forest Service
Steve Lawser, Wood Component Manufacturers Association
Emil Mossiman, European Organisation of the Sawmill Industry
Antonio Leite, Direcao-Geral dasFlorestas, Portugal
John McLoughlin, Coillte/Irish Forestry Board
Heiner Ollmann, Federal Research Centre for Forestry and Forest Products.
Mr. T. J. Peck, European Forest Institute
Monika Reinwand, European Organisation of the Sawmill Industry
Dave Sanders, Council of Forest Industries, Canada
Topi Sarpakunnas, University of Helsinki
Jeff Serveau, Industry Canada
Yrjö Sevola, Finnish Forest Research Institute
Matti Sihvonen, Finnish Forest Industries Federation
Kenneth Skog, USDA Forest Service, Forest Products Laboratory
Henry Spelter, USDA Forest Service, Forest Products Laboratory
Jarkko Taskinen, North Karelia Polytechnic, Finland
Ilse van den Akker, European Panel Federation
Richard Vlosky, Louisiana State University
Petteri Vuorinen, University of Helsinki
Mikael Westin, Swedish Wood Exporters’ Association
EXPLANATORY NOTES

“Apparent consumption” is calculated by adding a country’s production to imports and subtracting exports. Since data are not universally available, the apparent consumption volumes are not adjusted for changes in the level of stocks.

“Net trade” is calculated as the balance of exports and imports and is shown as “+” for net exports, when exports exceed imports and is shown as “-” for net imports, when imports exceed exports. Trade data for fifteen European Union countries include intra-EU trade, which is often estimated by the countries.

The countries of the former USSR and other former centrally planned countries of central and eastern Europe are referred to collectively as “transition economies”. The term “central and eastern Europe”, used exclusively for presentational convenience, includes Albania, Bosnia and Herzegovina, Bulgaria, Croatia, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Poland, Romania, Slovakia, Slovenia, The former Yugoslav Republic of Macedonia and Yugoslavia. Due to a change in statistical methods in producing this Review, the European totals do not include the Baltic Countries of Estonia, Latvia and Lithuania — this will be rectified in future Timber Bulletins.

The term “softwood” is used synonymously for “coniferous.” “Hardwood” is used synonymously for terms “non-coniferous” or “broadleaved” wood.

When no data were available, the previous year’s figure is used to calculate the regional total. As a convention in the analysis, one time period, for example first quarter of 1998, is compared to the analogous time period, continuing this example, the first quarter of 1997.

Statistics were received on the basis of joint ECE/FAO/ EUROSTAT/ITTO questionnaires to official statistical contacts in the 55 countries in the ECE region in early 1999. Correspondents had the opportunity to update their 1997 statistics and thus slight changes may occur from statistics reported in last year’s Timber Bulletin. The secretariat is grateful for correspondents diligence to provide actual statistics for 1998 and in the absence of formal statistics, their best estimates. Therefore all statistics for 1998 can be categorised as preliminary and subject to confirmation next year.

SYMBOLS AND ABBREVIATIONS USED

- nil or negligible
... not available
* secretariat estimate or unofficial figure
$ United States dollar unless otherwise specified
C$ Canadian dollar
c.i.f. customs + insurance + freight included
CIS Commonwealth of Independent States
EU European Union (currently 15 States)
f.a.s. free alongside ship
FOB free on board
GDP gross domestic product
IMF International Monetary Fund
m3 cubic metre (solid volume of roundwood or processed product)
m.t. metric ton
MW/h Megawatt per hour
N.A. Not available
NIEs Newly industrializing economies
OPEC Organisation of Petroleum Exporting Countries
Q Quarter
T Trimester
USDA United States Department of Agriculture
WWF World Wide Fund for Nature