

Wood Raw Materials

- Timber Committee forecasts by Mr. **Ed Pepke**, UNECE
- Expert presentation by Dr. **Håkan Ekström**, President, Wood Resources International, USA



Highlights of Forest Products Market Review, 2004-2005 (1-3)

- Total roundwood removals in the UNECE region reached record levels in 2004 reflecting a growing demand for both wood and paper products.
- Trade of roundwood continued to decline in both Europe and North America as a result of increased local processing of softwood and hardwood sawnwood.
- Huge storm hits northern Europe in early 2005, damaging 85 million m³ of timber, which will continue to impact harvests, trade flows and wood prices in Europe into 2006.



Highlights of Forest Products Market Review, 2004-2005 (4-5)

- Fuelwood removals in Europe were approximately 14% of total removals in 2004, and with the lack of affordable non-wood biomass in many countries, there has been a rise in trade of woodfuel, increasingly in the form of wood pellets.
- The CIS increased roundwood removals by 4.7% in 2004, with exports of raw material up by almost 12% compared with 2003, amounting to almost one third of the total industrial timber harvest.



Highlights of Forest Products Market Review, 2004-2005 (6-7)

- In addition to documented harvests and exports from Russia, there are substantial volumes of undocumented roundwood removals, from the eastern provinces in particular, destined for further processing in China, which are then exported to Europe, North America and other markets.
- In North America, the share of softwood industrial roundwood grew from 2002 to 2004, primarily as a result of a substantial increase of sawn softwood production.

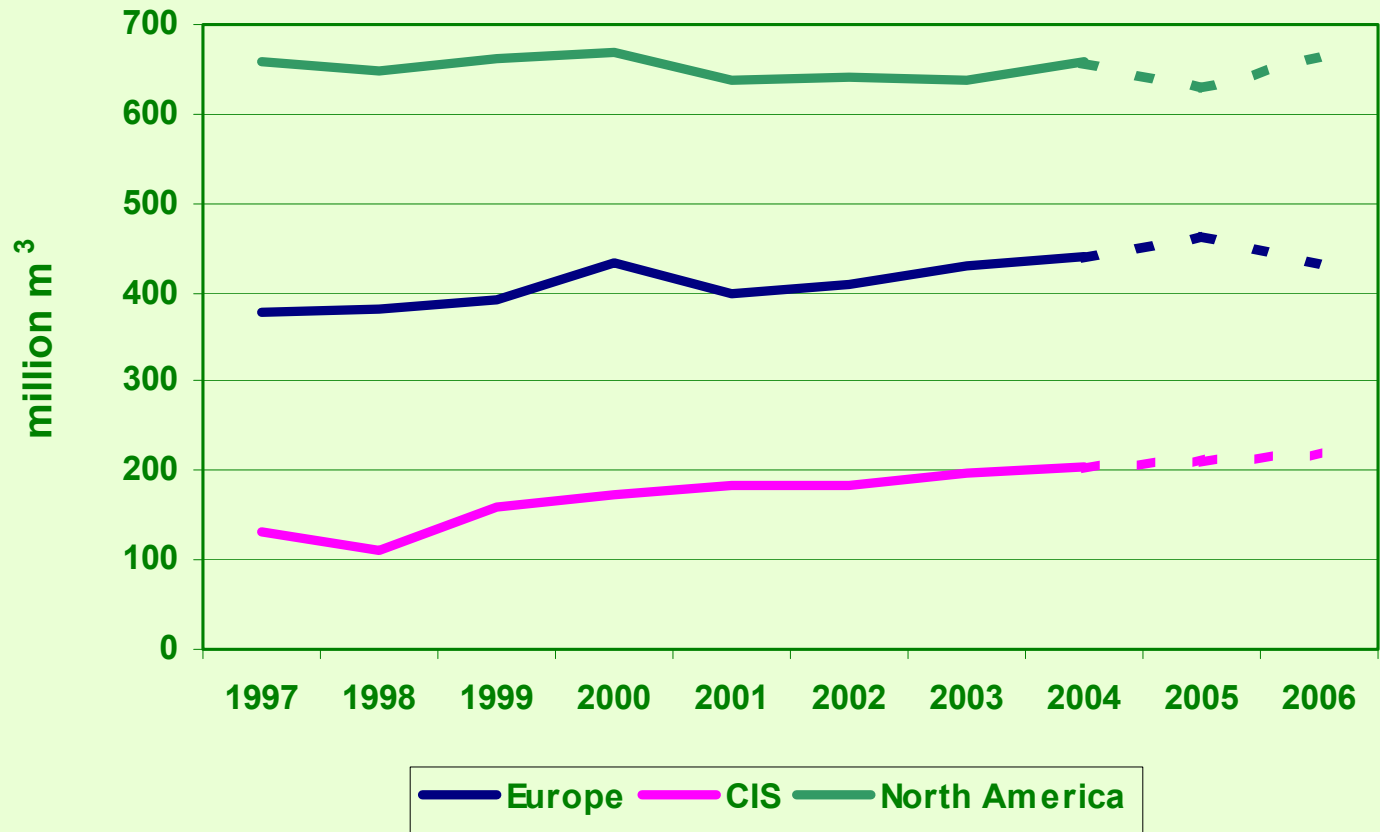


Highlights of Forest Products Market Review, 2004-2005 (8-9)

- Sawlog prices have been rising in most regions of North America and Europe in 2004 and 2005 as a result of higher log consumption by sawmills trying to meet the increased demand for sawnwood, mostly from the United States, Canada and central Europe.
- Prices for both pulp logs and residual chips were slightly higher in local currencies in Europe in 2004 than in 2003 and, as a result of the weaker US dollar, pulp manufacturers in Europe found themselves less competitive than many producers in the US.



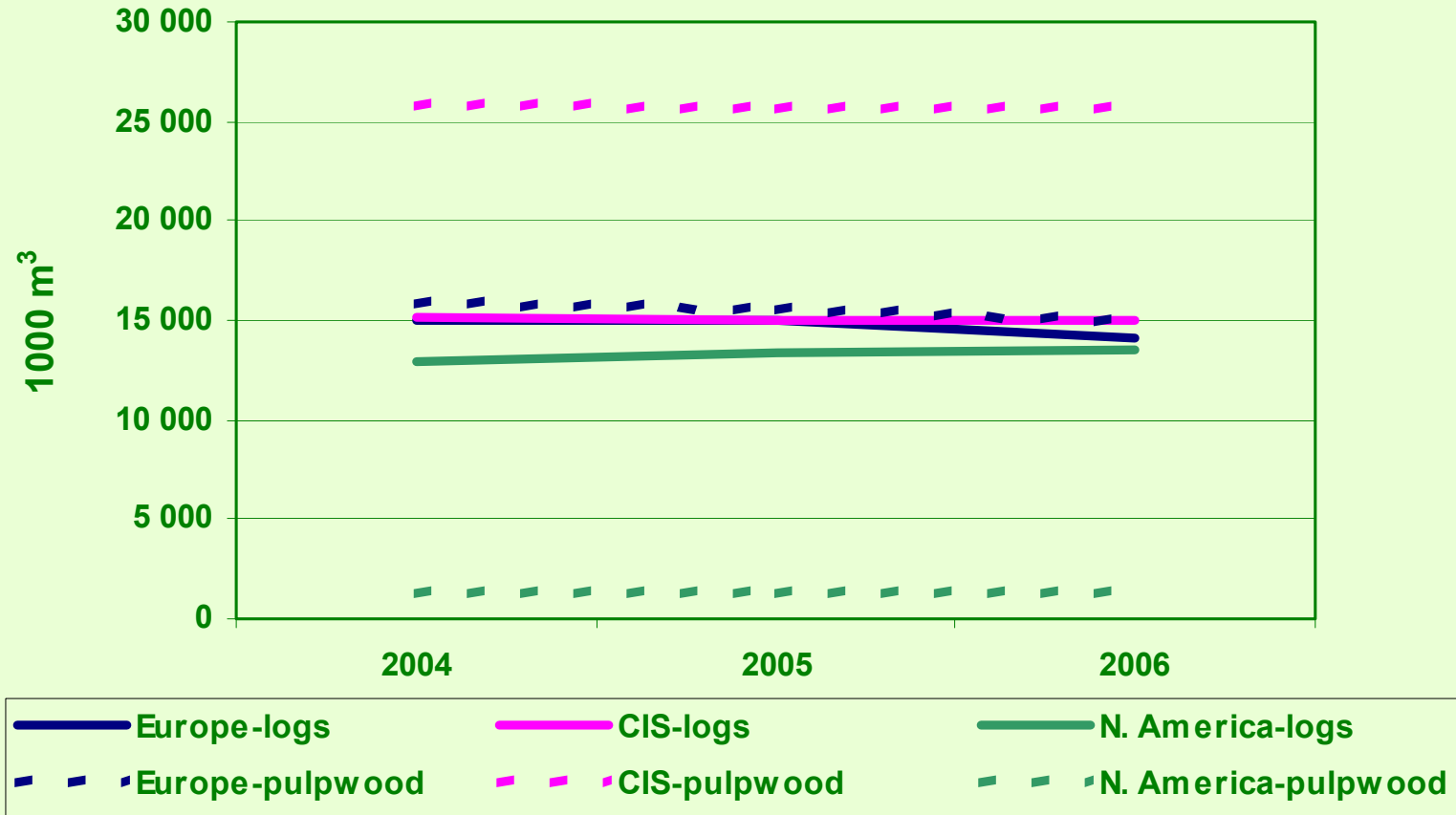
Roundwood Removals



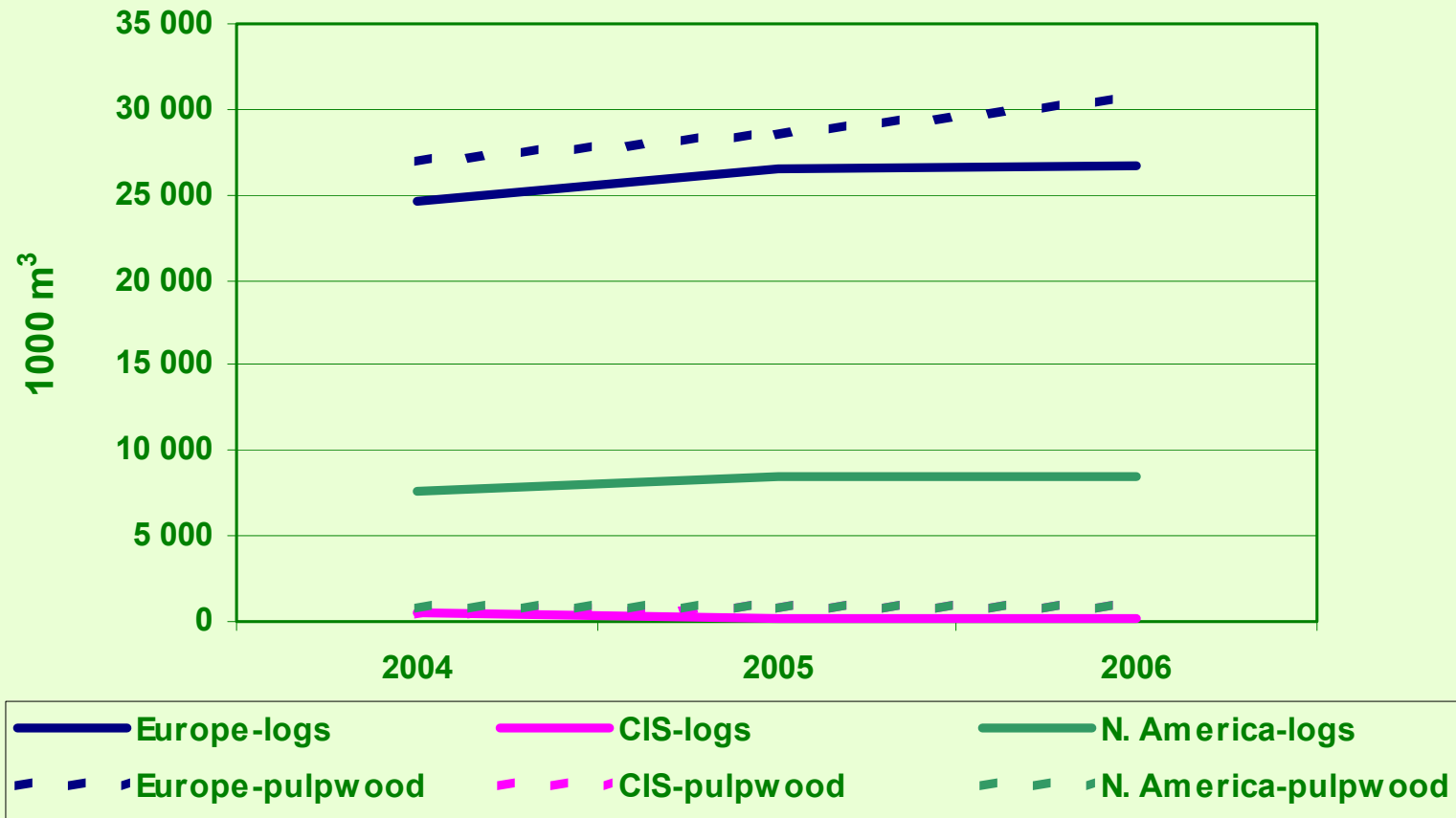
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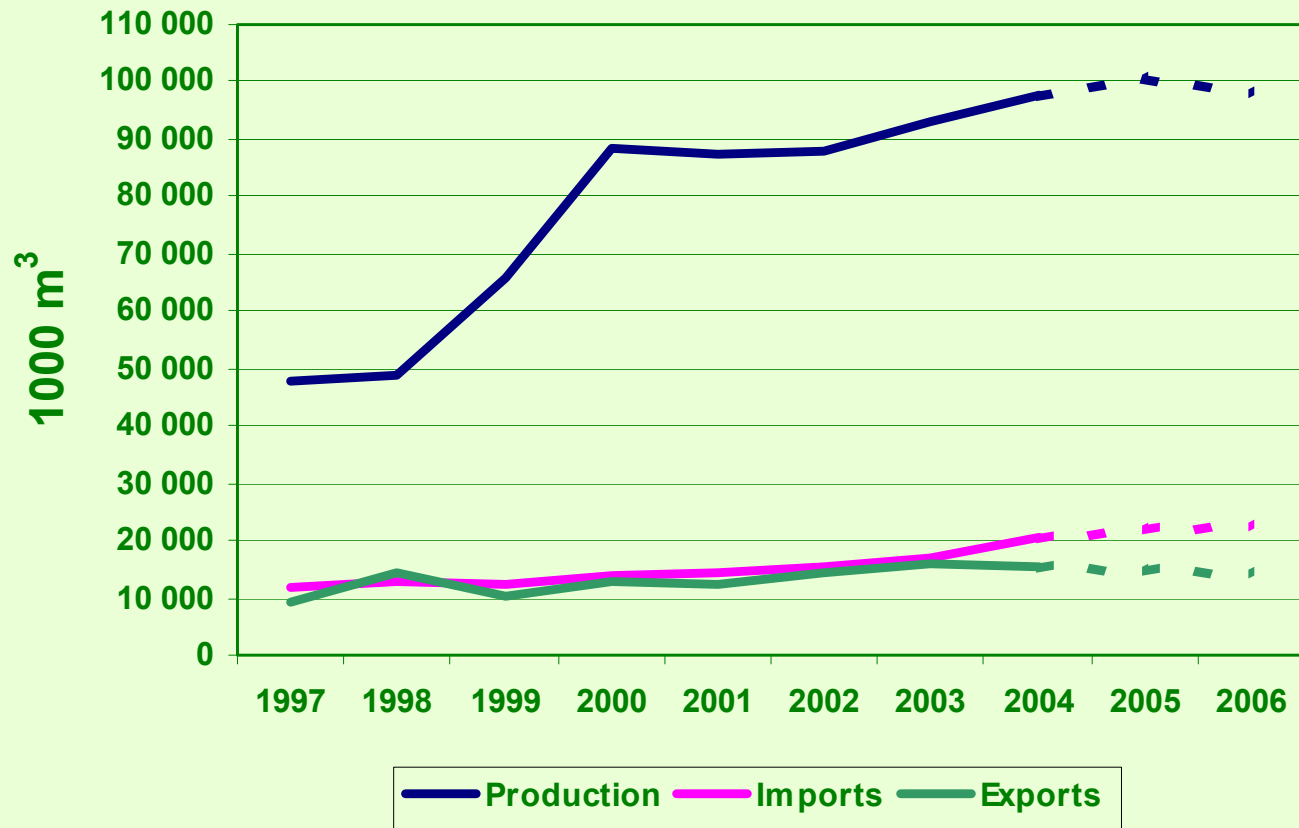
Log and Pulpwood Exports



Log and Pulpwood Imports



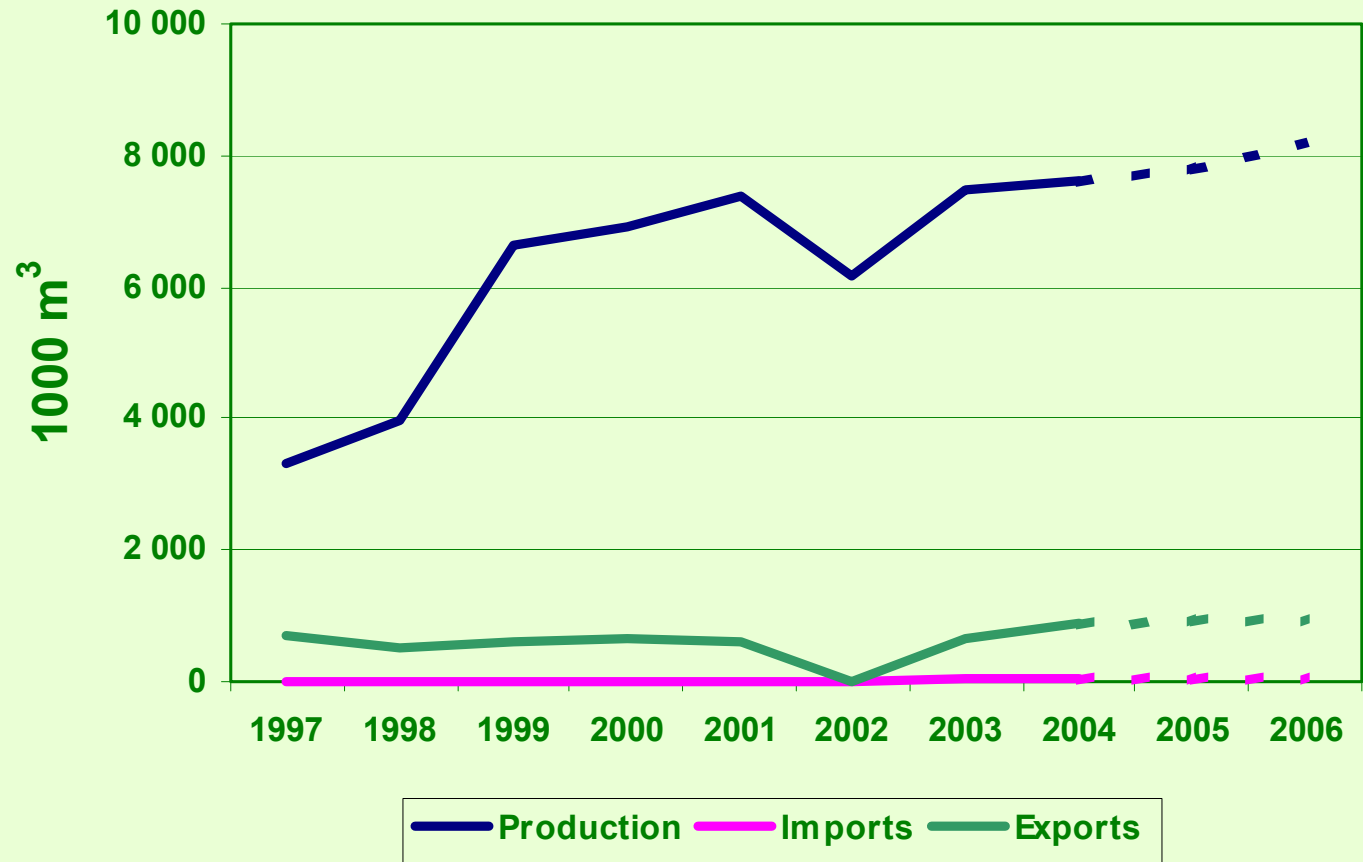
Chips, particles and residues - Europe



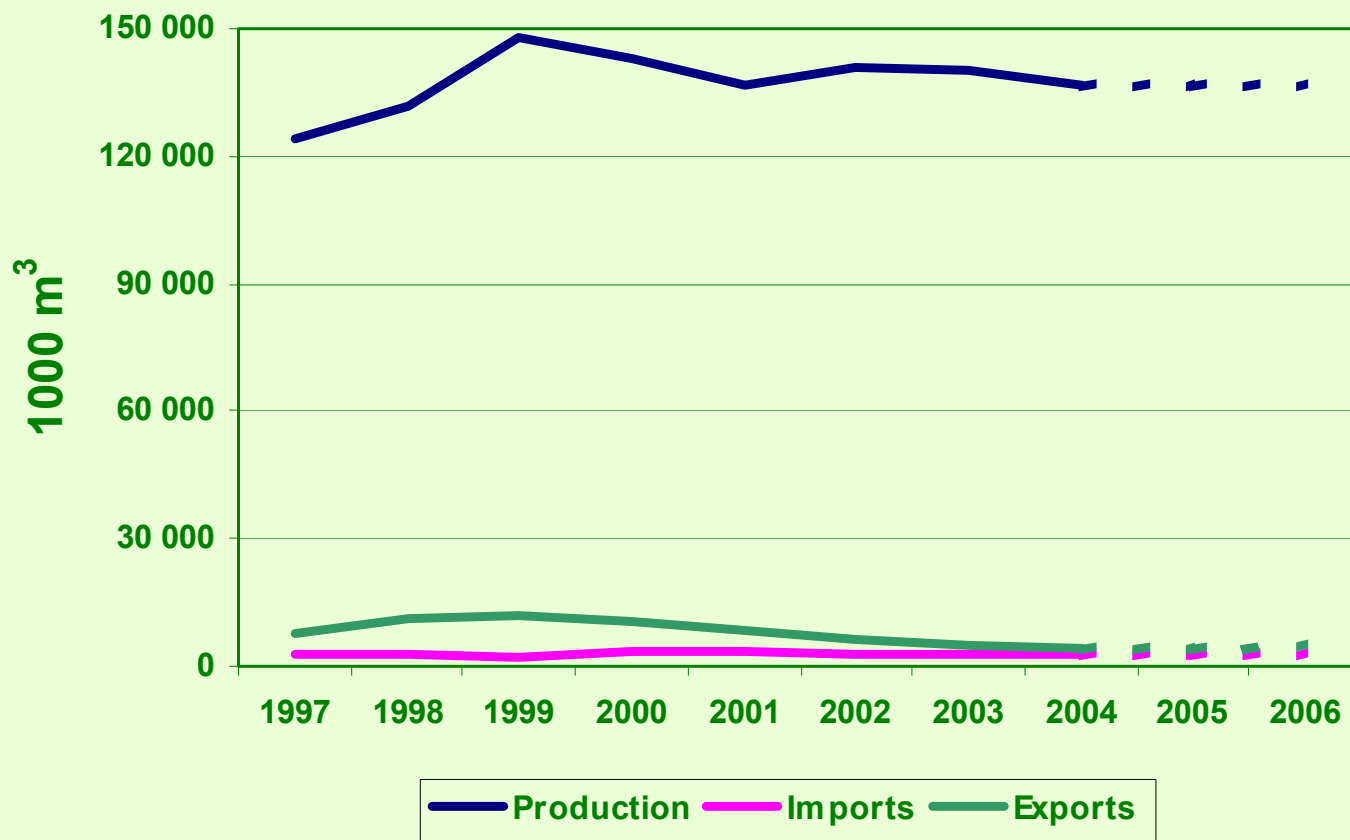
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Chips, particles and residues - CIS



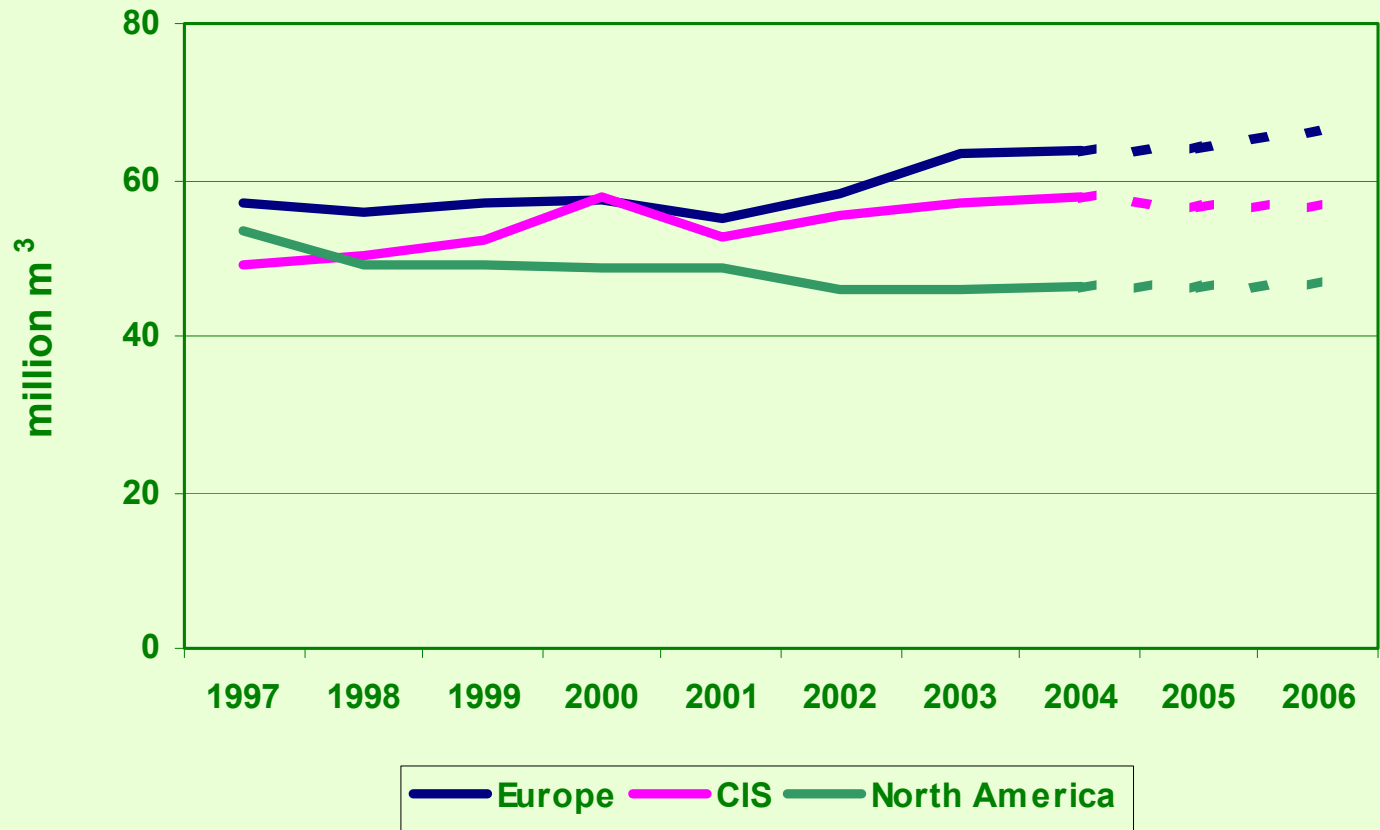
Chips, particles and residues – North America



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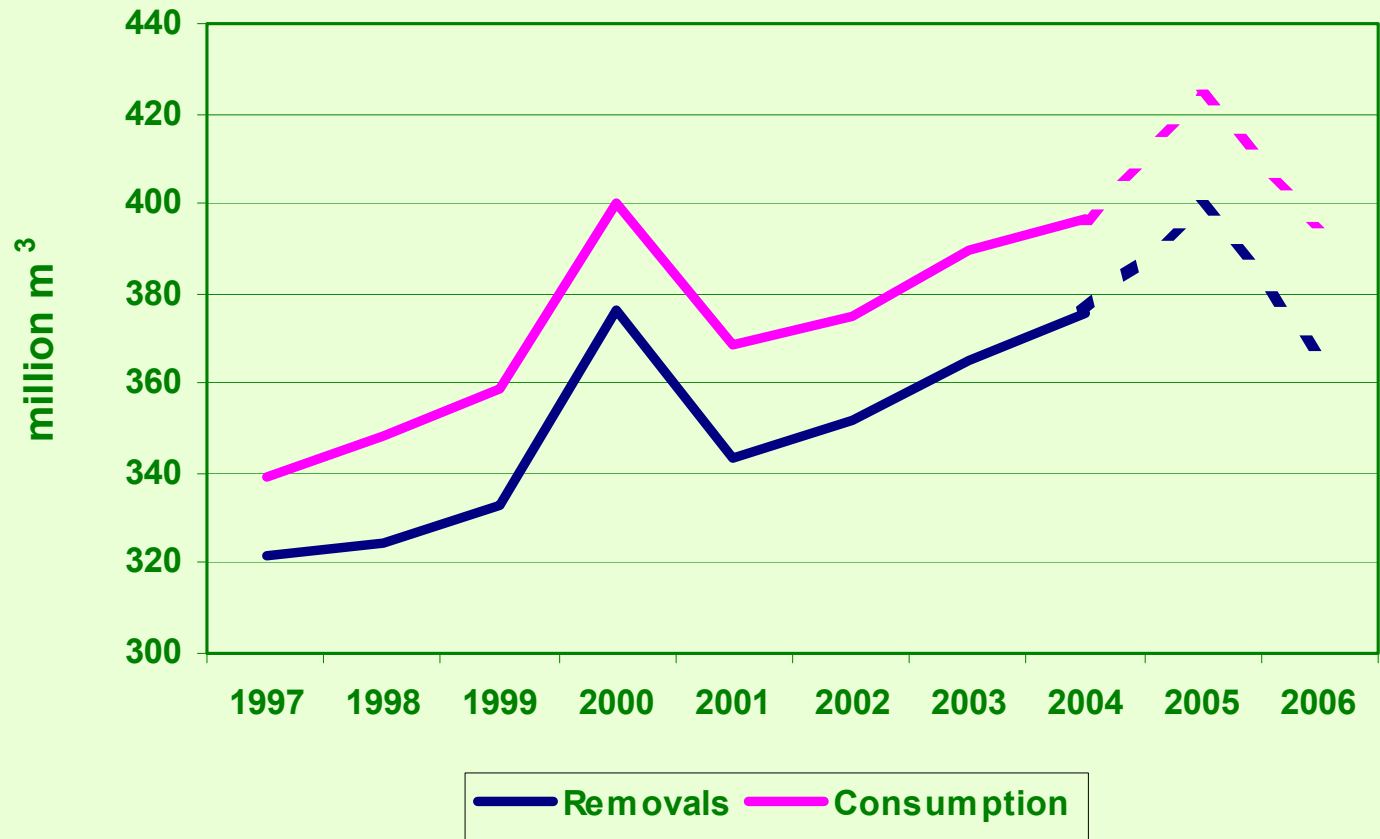
Wood Fuel Removals



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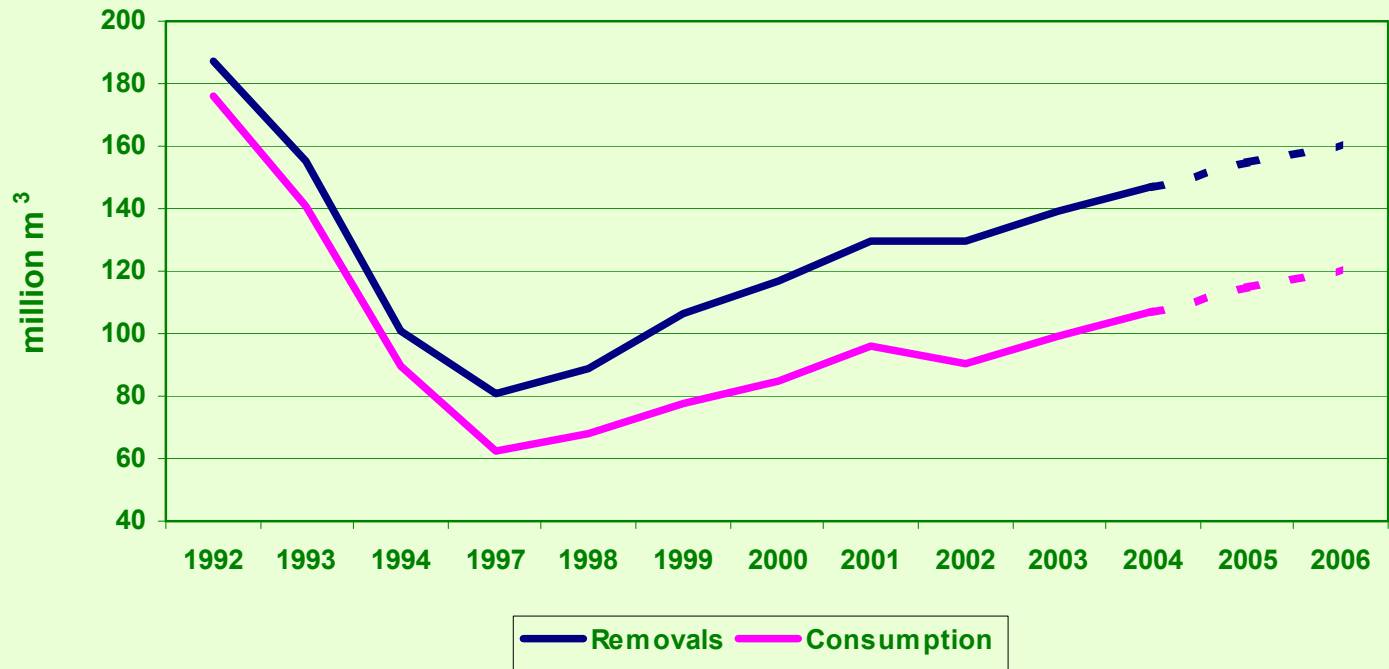
Industrial Roundwood - Europe



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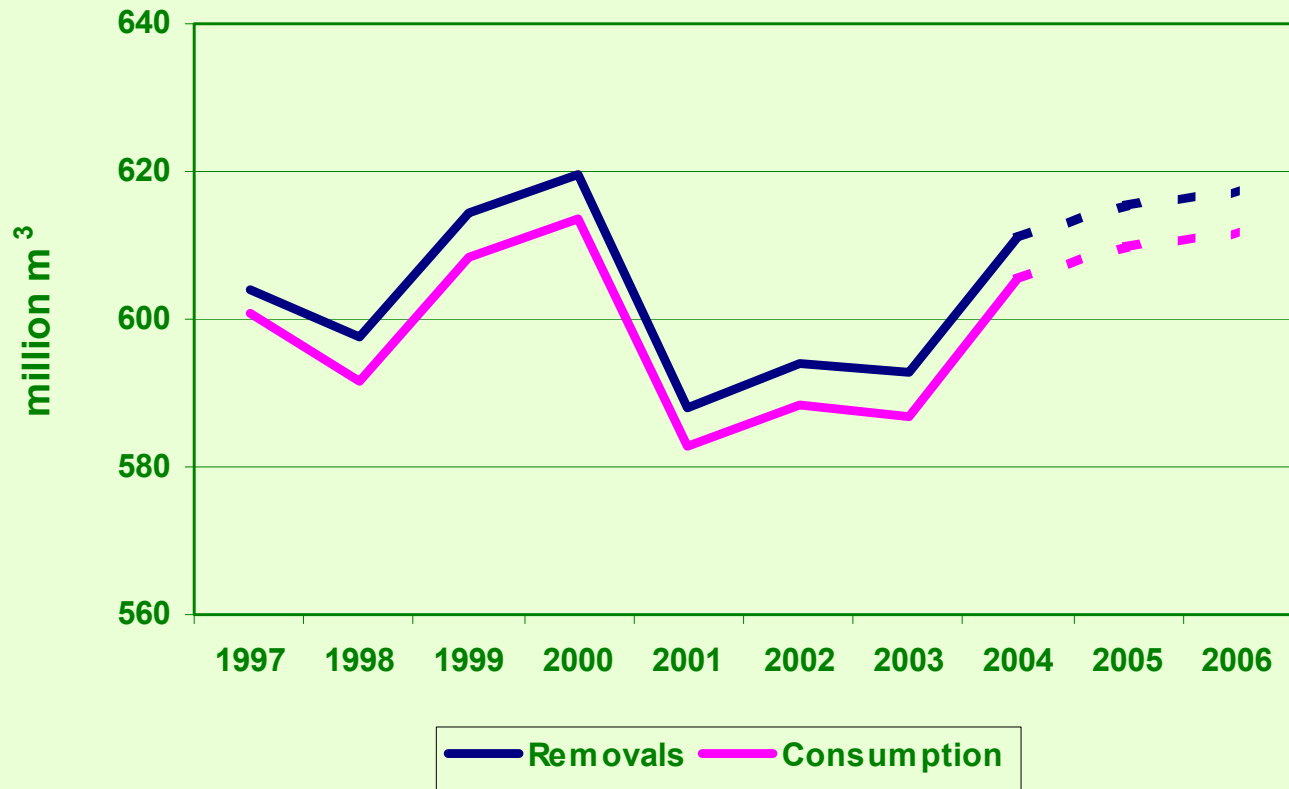
Industrial Roundwood - CIS



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Industrial Roundwood – North America



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Next Presentation

- Wood energy and other wood raw materials, Dr. Håkan Ekström, President, Wood Resources International, Washington, USA



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