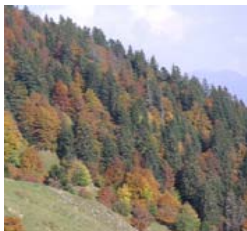




Roundwood market developments in the UNECE region



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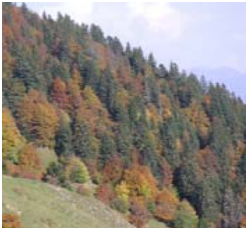
Highlights from 2007-2008 Forest Products Annual Market Review (1 of 3)



- Sawlog prices
 - Europe grew faster than the world average
 - Prices have fallen in North America.
- Pulp industry wood costs
 - Record high in 2008
 - Largest increases for softwood US, Spain, Chile, Finland and Japan.
- Industrial roundwood production in the UNECE region +4.3% to 1.17 billion m³ in 2007.



Highlights from 2007-2008 Forest Products Annual Market Review (2 of 3)



- Industrial roundwood consumption
 - UNECE region + 4.3% 2007
 - CIS +18%
 - Europe +10
 - - 2% in North America – lowest level since 2001
- 10% of roundwood production in the UNECE region exported
- European pulpwood
 - +4.1% 2007
 - New record of 162 million m³
 - Of which 121 million m³ was roundwood



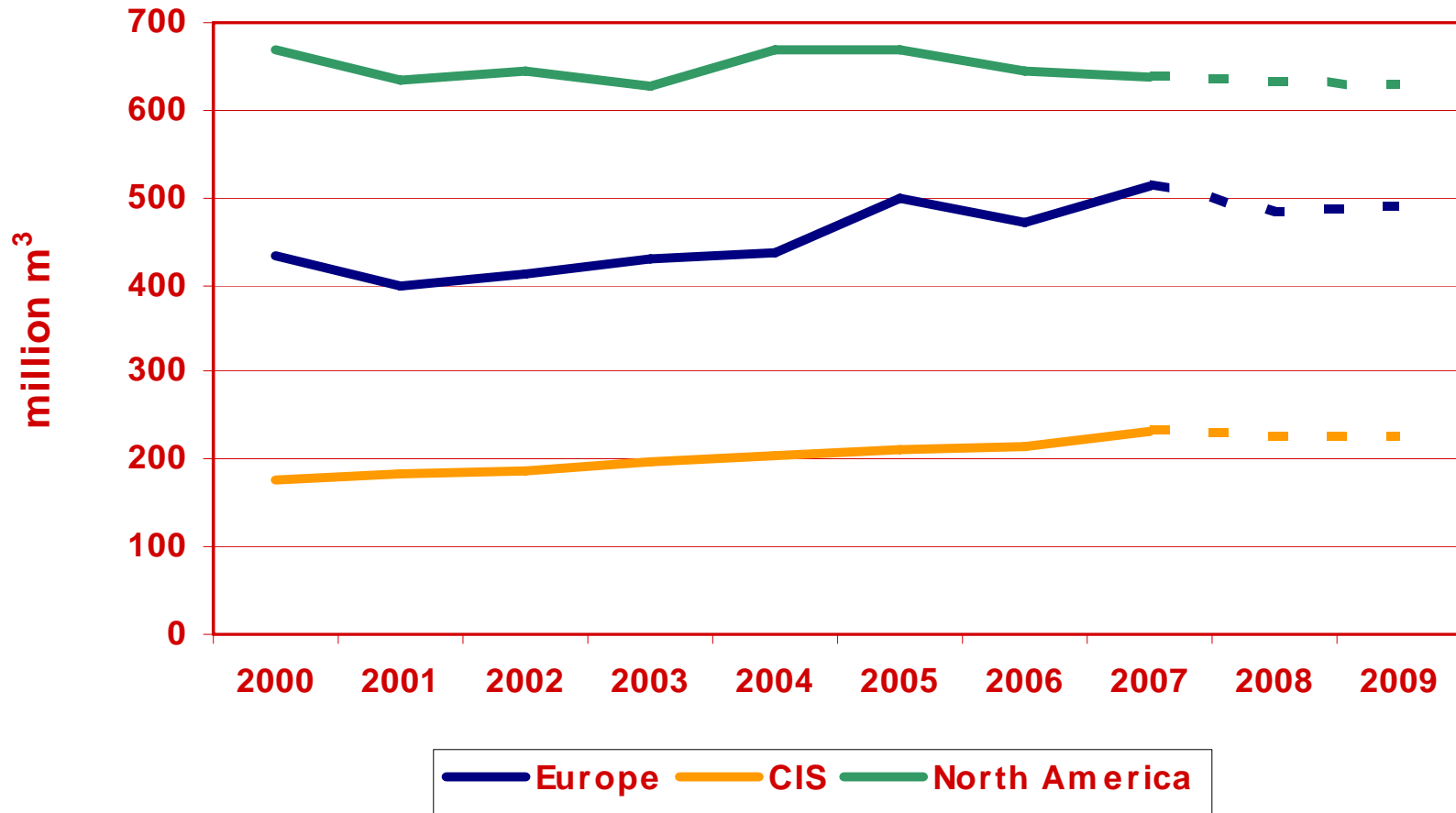
Highlights from 2007-2008 Forest Products Annual Market Review (3 of 3)



- Global trade of woody biomass
 - Primarily for energy
 - 11 million m.t. in 2007, up from 5.6 million m.t. in 2003
 - Major trade flows within Europe and
 - Between Canada and western Europe
- Russian Government's log export taxes accelerated
 - Softwood logs exports declined 2007
 - Fell additional 44% to Europe in 1Q 2008
 - Fell 15% to Asia in 1Q 2008
 - Proposed export taxes could halt exports in 2009.
- Consumption of softwood industrial roundwood in the US
 - - 6.8% to 266 million m³ in 2007
 - Due to record low housing starts



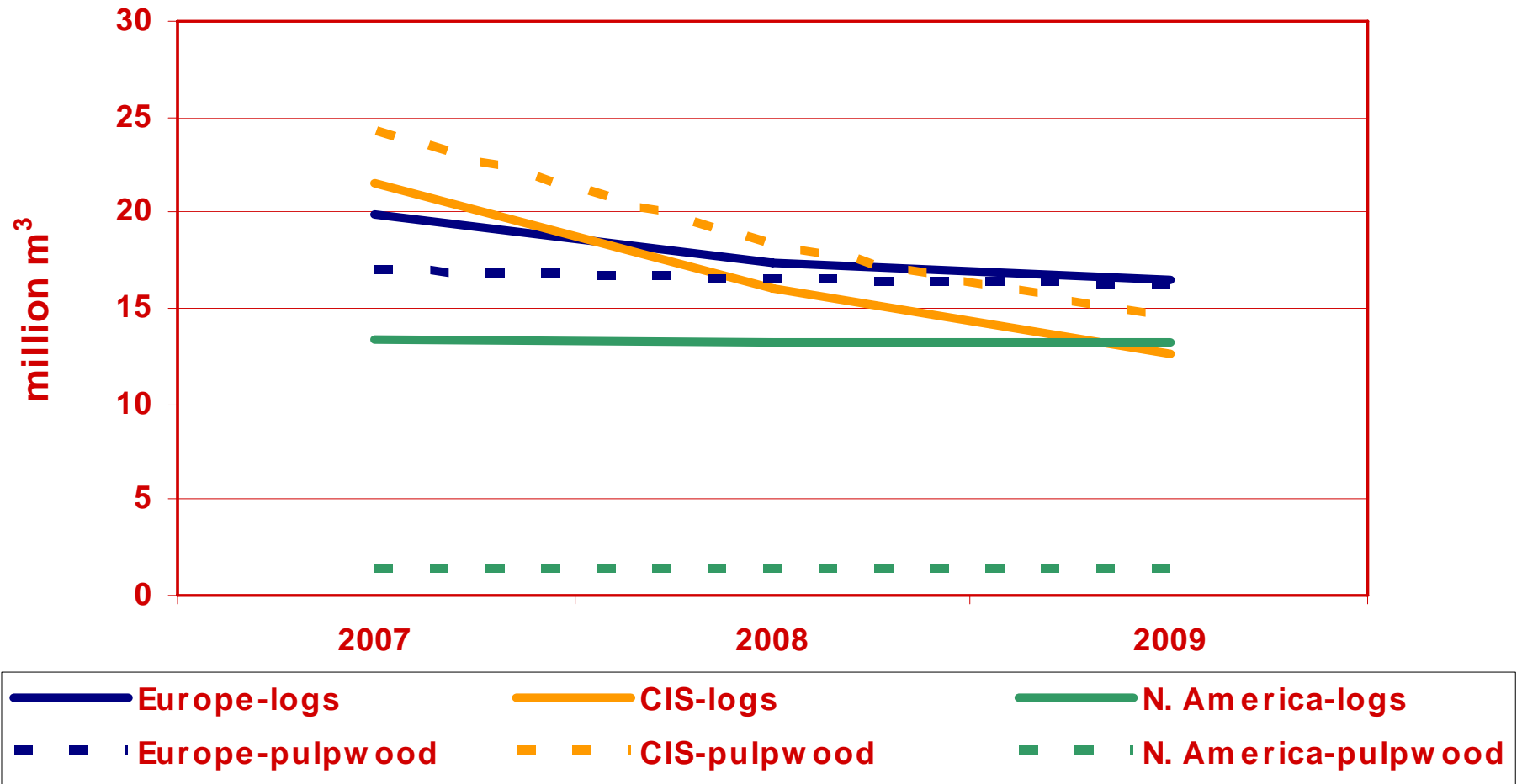
Roundwood removals



Joint Timber Committee and European Forestry Commission Market Discussions, Rome, 21-24 October 2008



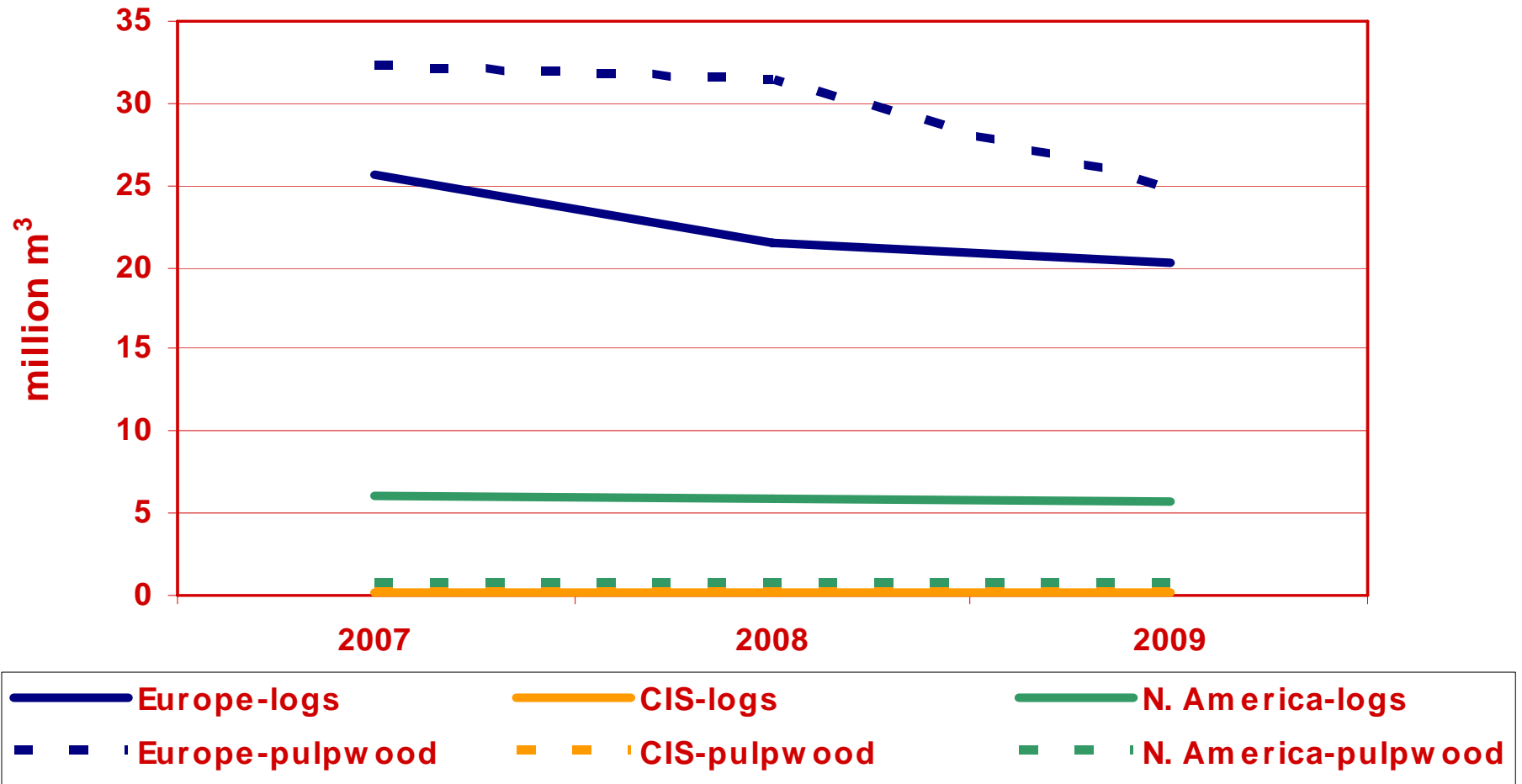
Log and pulpwood exports



Joint Timber Committee and European Forestry Commission Market Discussions, Rome, 21-24 October 2008



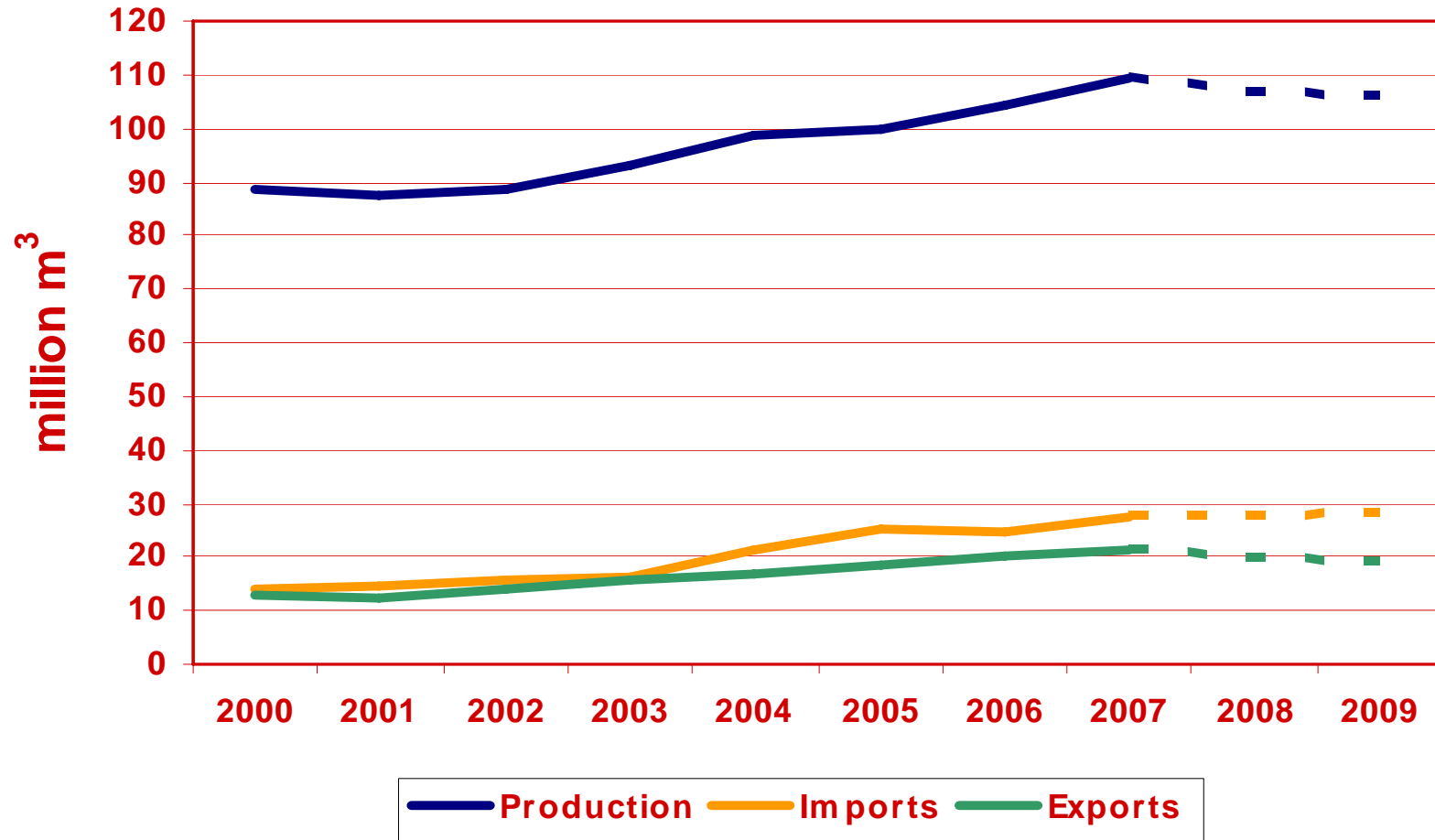
Log and pulpwood imports



Joint Timber Committee and European Forestry Commission Market Discussions, Rome, 21-24 October 2008



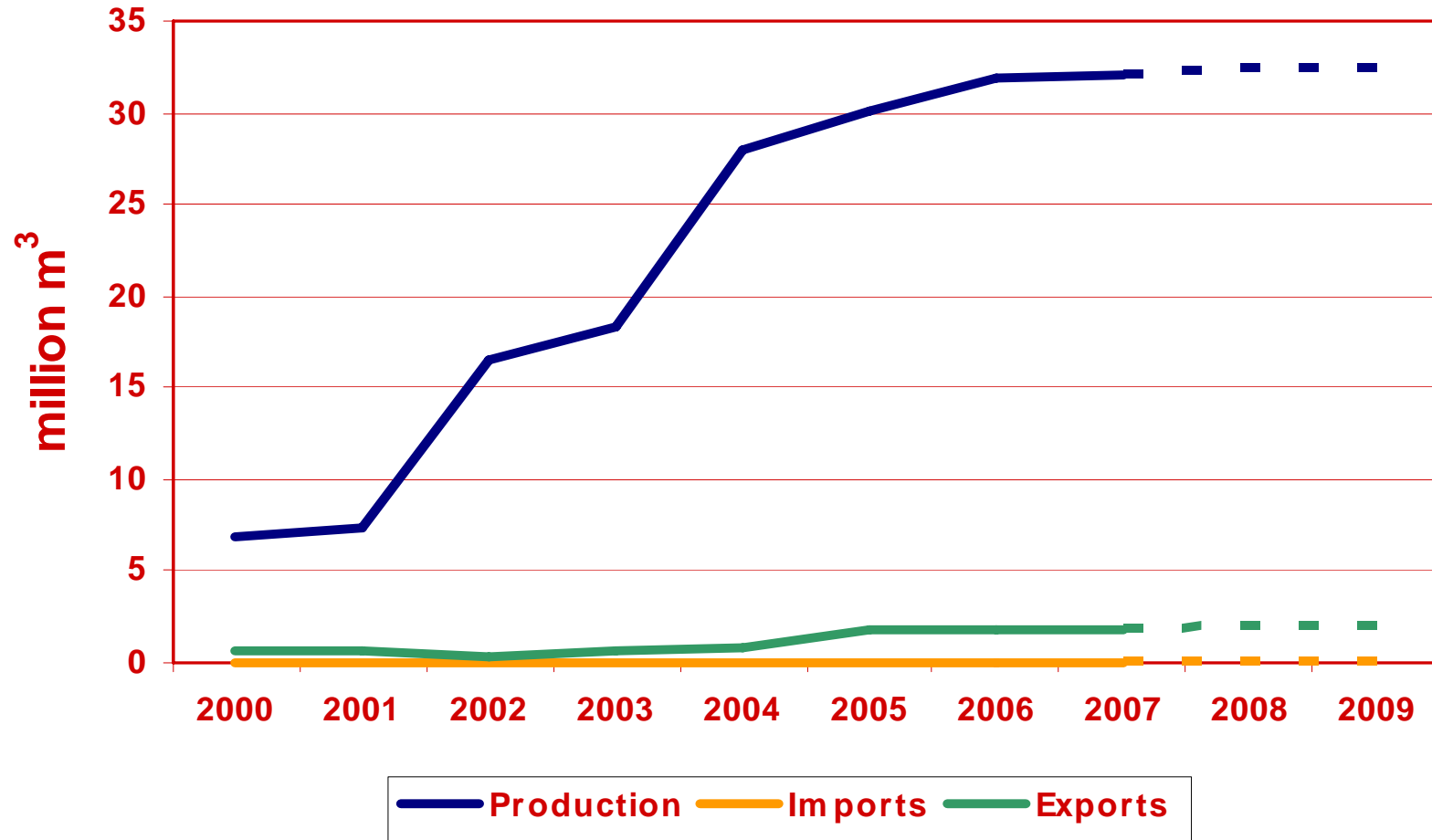
Chips, particles and residues - Europe



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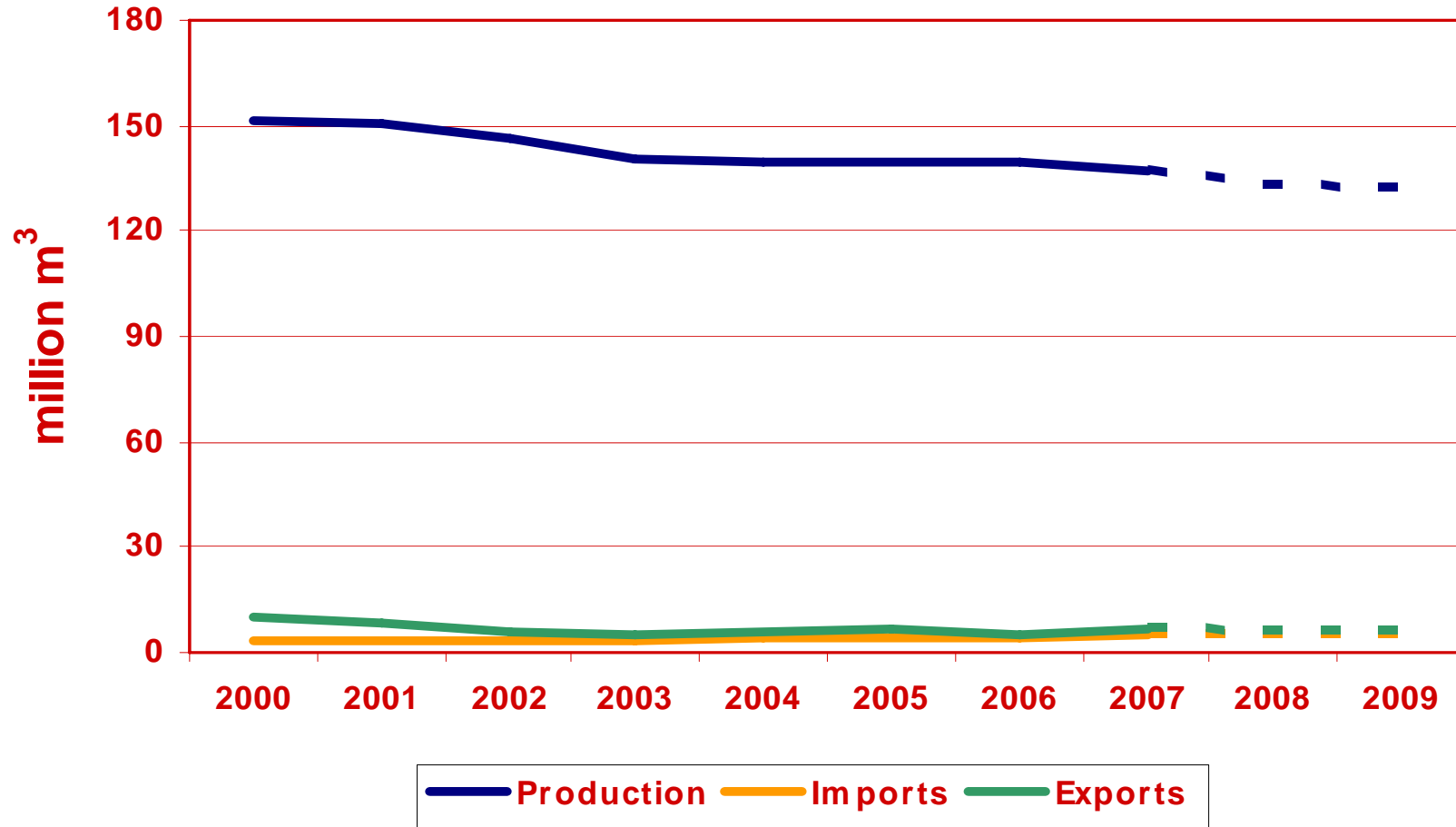
Chips, particles and residues - CIS



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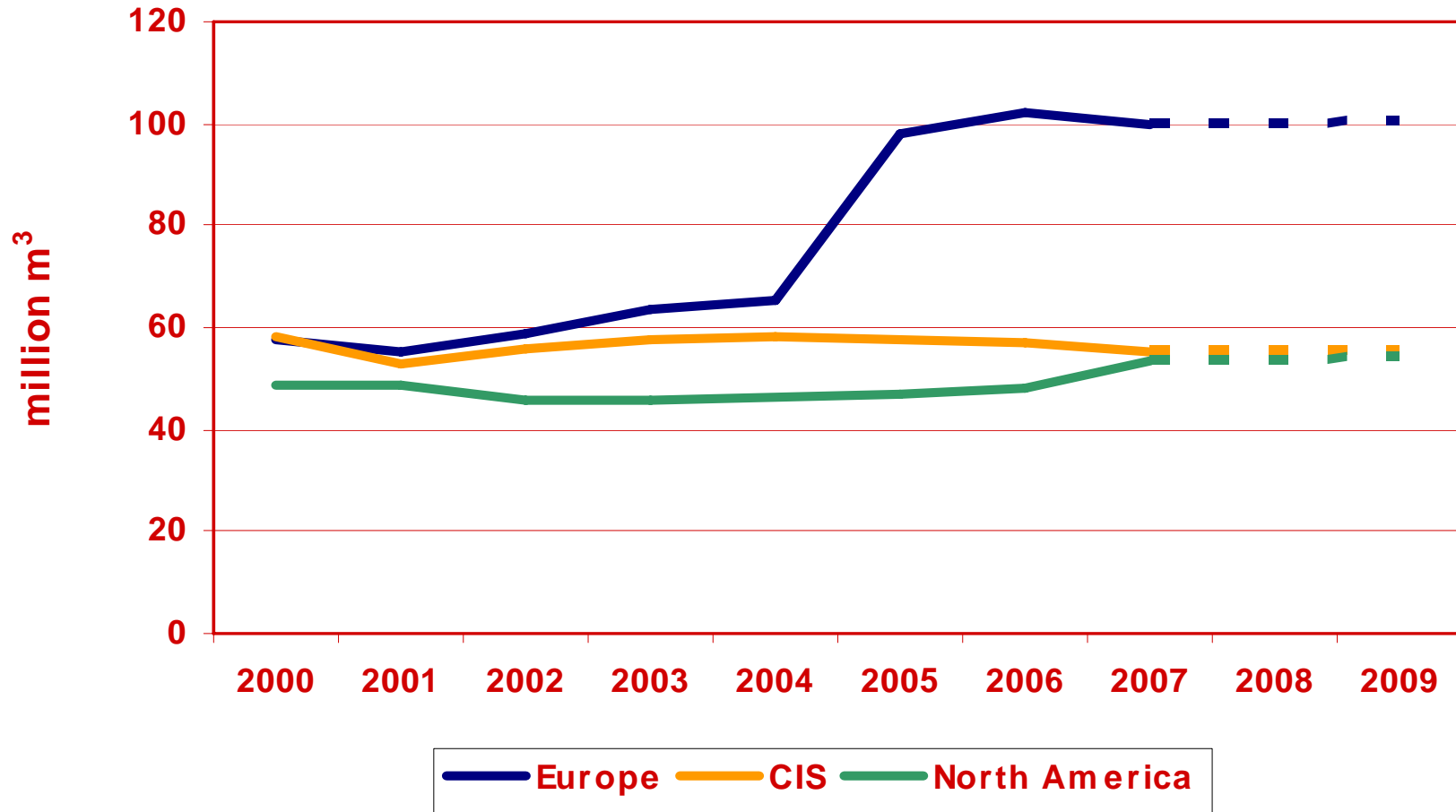
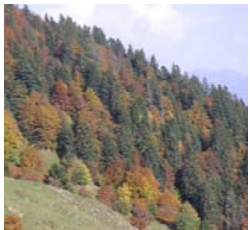
Chips, particles and residues – N. America



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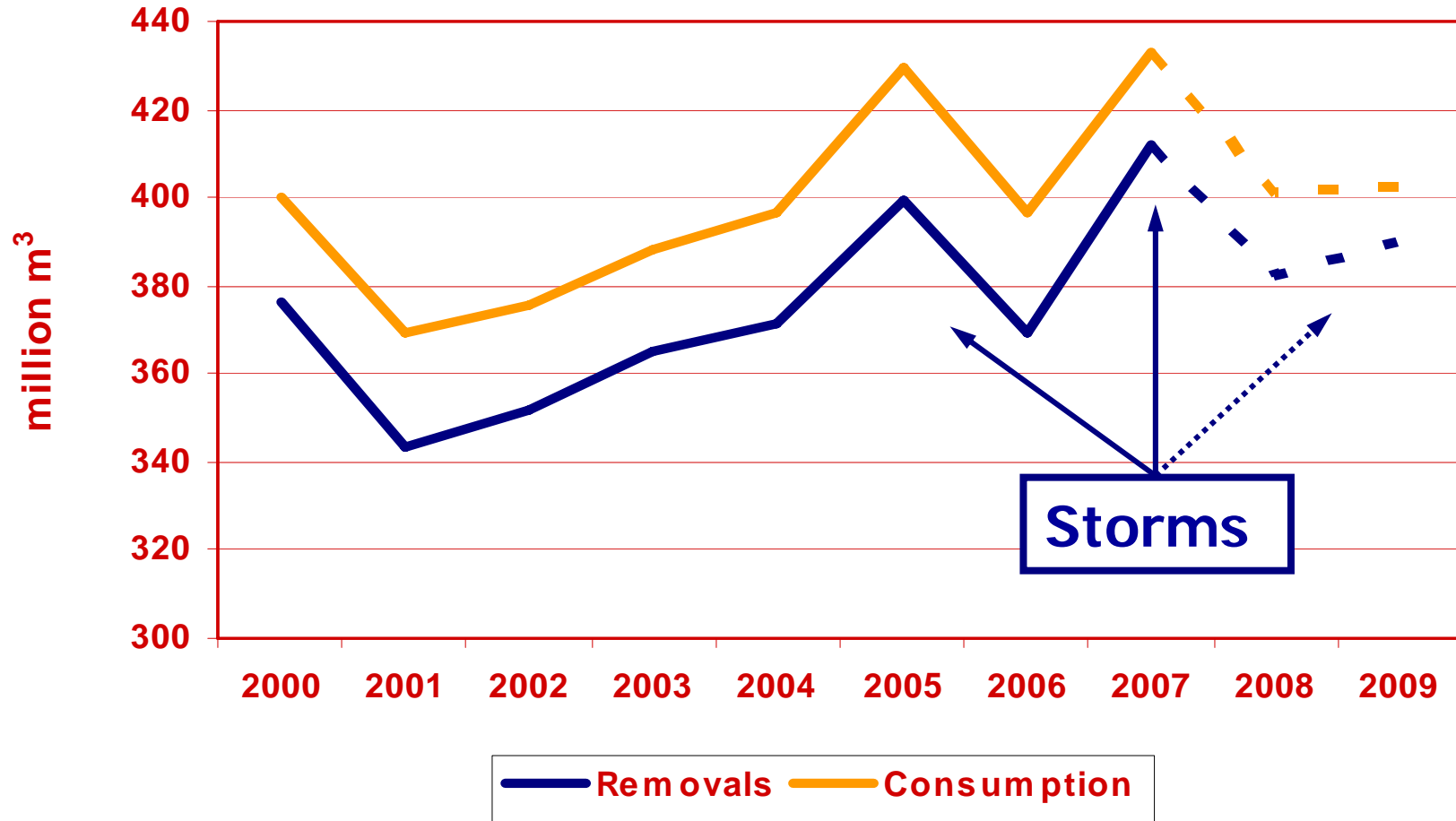
Woodfuel production



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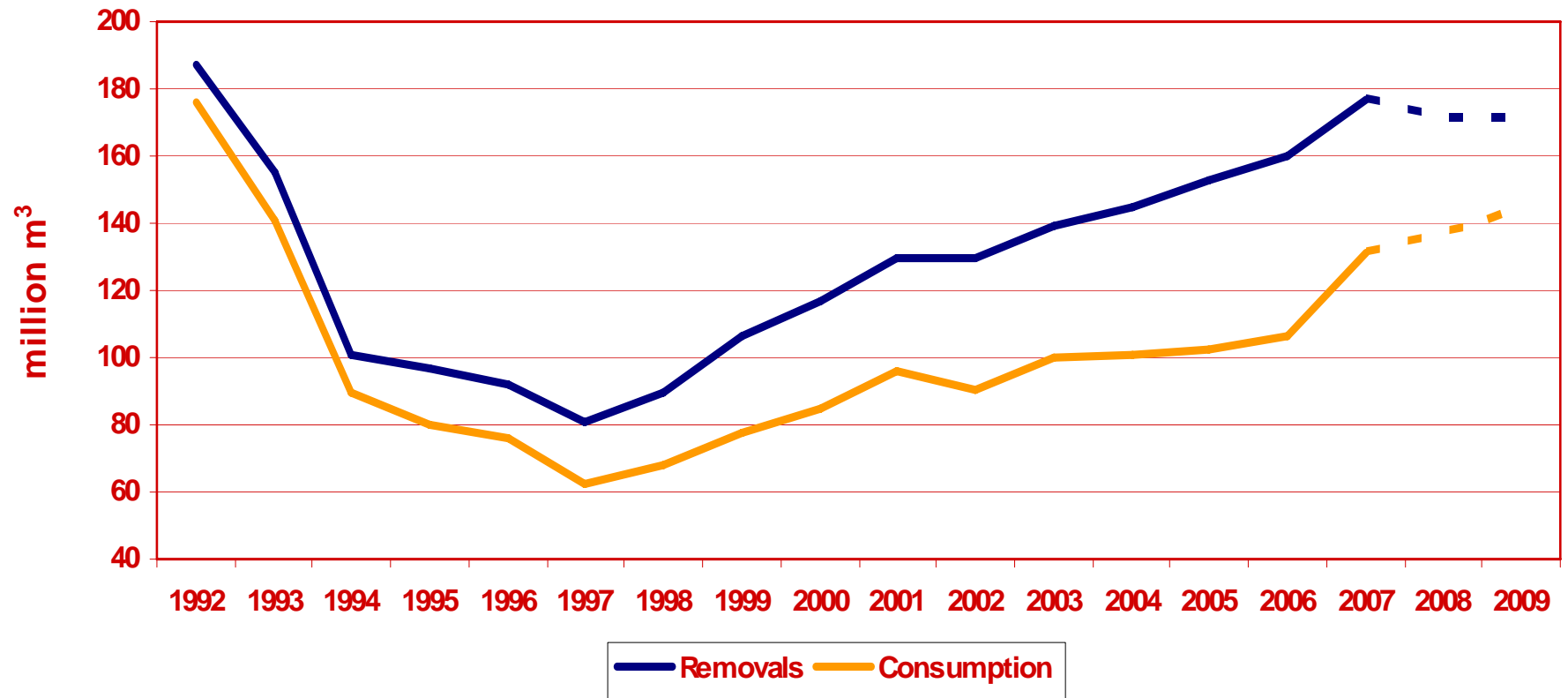
Industrial roundwood removals - Europe



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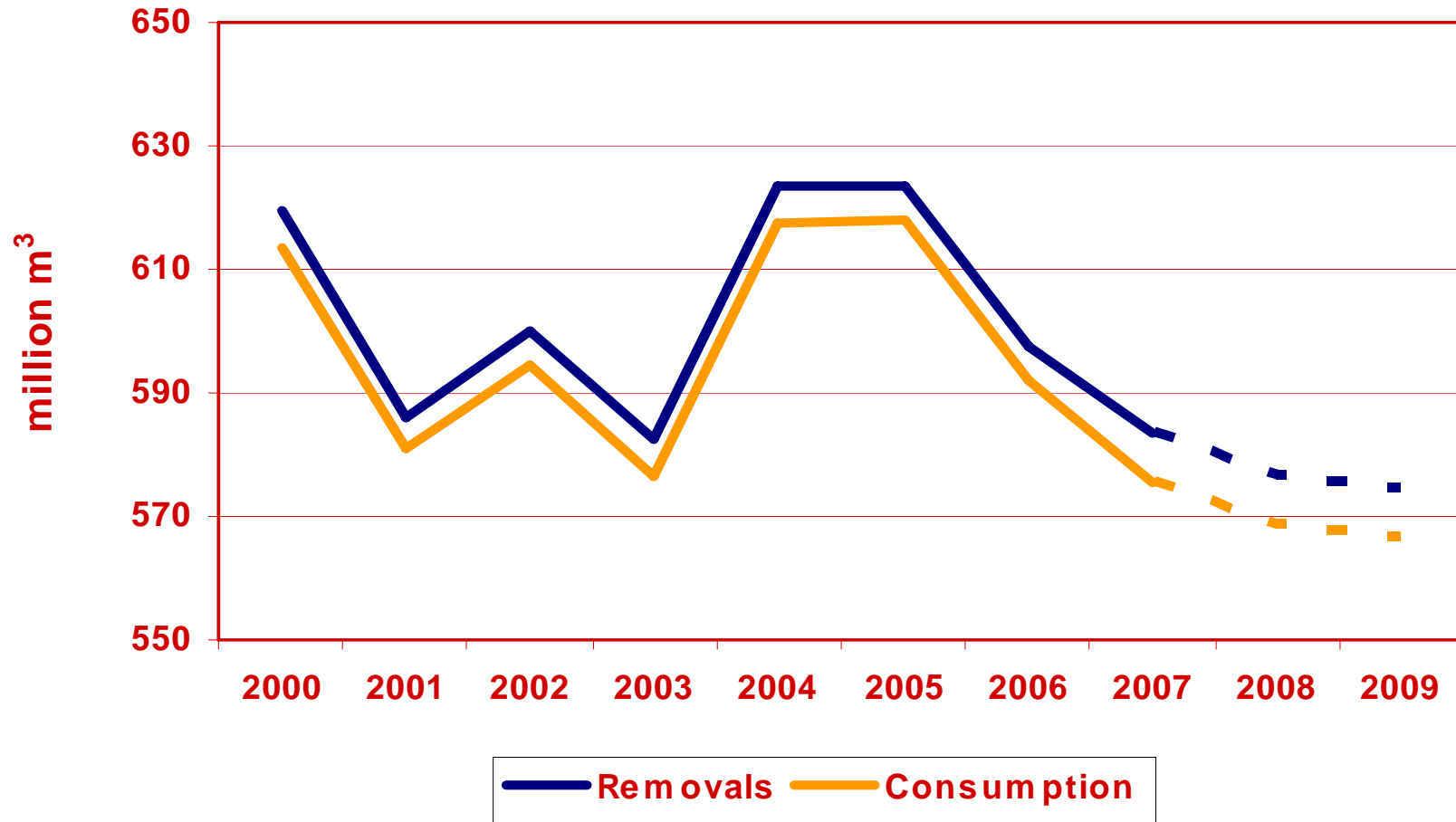
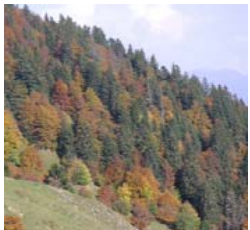
Industrial roundwood removals - CIS



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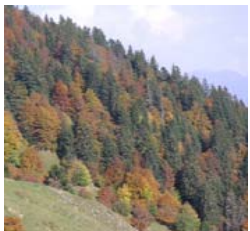


Industrial roundwood removals – N. America



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