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P O L A N D
STATEMENT ON THE WOOD MARKET
REVIEW AND PROSPECTS

Ministry of the Environment

1. GENERAL ECONOMIC TRENDS AFFECTING THE FOREST AND FOREST INDUSTRIES SECTOR

In Poland the year 2019 was characterised by a slow decrease in the GDP growth rate. GDP increased 4.1% in real terms (1.2 percentage points less than in 2018). Domestic demand was the primary stimulus of the growth and its contribution to GDP was 2.9 percentage points, despite clearly lower dynamics than in the previous year (3.0% compared to 5.6%). At the same time, the growth of public consumption was higher (4.9%) than of private consumption (3.9%). Net export also had a significant bearing on the GDP growth in real terms (1.2 percentage points). Although gross outlay on fixed assets was 7.2% higher than the year before (when it was 9.4%), gross accumulation decreased 0.7%. Gross added value increased 4.1%, as did GDP, and it was a growth of 1.2 percentage points lower than in 2018 – 4.2% in industry (compared to 5.2% in the previous year) and 3% in construction (compared to 11.7% in 2018). It is forecasted that, due to the economic crisis caused by the COVID-19 pandemic, GDP will decrease 4.6% in 2020 in Poland. The drop in domestic demand will be 4.8%. However, the scale of GDP decrease is to be limited by public consumption (it is anticipated that it will grow 2.5% in real terms in relation to 2019). In 2021 the economy is to gradually return to the growth path from before the pandemic, and GDP should increase 4%. After the period of recession, domestic demand in general and private consumption in detail, will be the primary stimuli of economic growth (their growth is anticipated to reach 4.1% and 4.4%, respectively). It is assumed that the investment demand growth will be stimulated by more effective than formerly use of the European Union funds, low cost of capital, and the actions of the government targeted at the growth of innovativeness and productivity of the economy.

In 2019 in Poland the growth of sold production of industry was 3.9%, in real terms, and of manufacturing 4.2%. Sold production in the wood sector was PLN 146.8 billion (\$ 38.2 billion, € 34.1 billion) and accounted for 8.9% of its value in industry in total and for 10.2% of its value in manufacturing. Sales dynamics in the wood sector in principle was lower than in industry on average and equalled 1.6% in the wood industry, 2.3% in the pulp and paper industry (together with paper processing), and 3.9% in the furniture industry. The branch structure of the wood sector sales did not change in 2019 – sales were dominated by the furniture industry with a more than 35% share, while the shares of the pulp and paper industry (together with paper processing) and the wood industry were 34% and approximately 30%, respectively. The wood industries also suffer from the consequences of the economic slowdown in 2020, but to various degrees (in H1 of 2020 sales in the pulp and paper industry remained at a level observed in the corresponding period of the previous year, while in the wood industry its decrease was 3.4% and the furniture industry recorded the highest fall in sales equalling 10.2%). It is assessed that of all wood industries it is the furniture industry that may suffer the most from the consequences of the crisis due to the decrease in demand for Polish furniture in the European countries, which are the main importers of it.

In 2019 the situation on the labour market in Poland was still relatively good. The registered unemployment rate was 5.2% at the end of the year (in 2018 it was 5.8%). The average employment in industry and manufacturing increased 1.2%. In the wood sector the increase was almost 1% (it is estimated that the sector employed 350 thou. people in 2019, of which 50% in the furniture industry, 31% in the wood industry, and 19% in the pulp and paper and paper processing industry). The share of the sector within total employment in industry and manufacturing was 12% and 13.8%, respectively. In 2019, approximately 45 thou. people were employed in forestry, of which 26.4 thou. people were employed by the State Forests. It is forecasted that situation on the labour market will deteriorate in the period 2020-2021, i.e. the unemployment rate will rise to 8% and 7.5%, respectively, and employment in the economy will decrease 2.4% and 0.7%, respectively. As to the labour market, the results for 2020 so far

suggest that a similar fall in employment may also be observed in the wood sector.

The deterioration in foreign trade observed in 2019 impacted the dynamics of Polish export (4.4% compared to 6.1% in 2018) and import (3% compared to 7.1%). Poland exported commodities of a value of PLN 1023.6 billion (\$ 267.1 billion, € 238.1 billion) and imported goods whose worth equalled PLN 1018.5 billion (\$ 265.8 billion, € 237 billion). As a result, the positive balance of foreign trade reached PLN 5.1 billion (\$ 1.3 billion, € 1.2 billion). The European Union states are the most important trade partners of Poland (of which primarily Germany), whose share within export was 80% and within import 58%. Wood and wood products are important goods in foreign trade – in 2019 they accounted for 8.7% of the export value (while the furniture's share within total Polish export was 4.7% and within export of wood and wood products 50%) and for 4% of the import value. It is forecasted that in 2020 Polish foreign trade will suffer from the consequences of the pandemic, i.e. export will decrease 9.3% and import 10.2%; however, it is assumed that due to a relatively large diversification of the export markets and a relatively well condition of Polish companies, already in 2021 export may rise 6.9% and import 7.3% (in relation to the previous year).

In 2019 the inflation rate increased to 2.3% in Poland (1.6% in 2018). The highest increase in prices concerned food and medical services, while a price drop was observed for, inter alia, apparel, footwear, and energy carriers. It is anticipated that in 2020 price index of consumer goods and services will increase to 3.3%; however, according to the assumptions, already in 2021 the inflation rate should decrease to 1.8%.

Situation in global and European economy is of key importance for the further growth of Polish economy. Already before the emergence of the coronavirus pandemic, global economy showed clear signs of a slowdown, and the trade war between the United States and China, *brexit*, climate crisis, and conflicts in the Middle East contributed to the escalation of uncertainty on the global market. *Lockdown*, which was introduced in many countries to countermeasure the pandemic, contributed to a significant reduction of their economic activity. Interestingly, thus far Polish economy has suffered less from the consequences of the pandemic than other European countries, which is due to, inter alia, lesser dependency on export, lesser degree of internationalisation (including weaker economic relations with China), greater diversification of production, and also a higher economic growth rate before coronavirus came into play. As to the wood sector, when individual countries isolate themselves and former supply chains are broken, the relatively high degree of self-supplies of Polish companies with wood from the domestic raw material base assures, at least for some time, maintenance of their production capacities. Despite the slow process of “opening” of European economies, there still is uncertainty as to the course and short- and long-term consequences of the pandemic. Entrepreneurs are redefining their business models and development strategies. They are trying to restore broken supply chains and accelerate changes in the sphere of digitalisation and automation, but the awareness of the need to operate in the conditions of limited demand and supply in the nearest months is growing. The actions taken in Poland should be supported by the European Union funds, which are to be used to finance undertakings connected with, inter alia, health protection, digitalisation, development of entrepreneurship, and climate protection. Since these funds are intended to finance the “green” and digital transformation, one should expect that wood companies will also benefit from them.

2. POLICY MEASURES TAKEN IN POLAND OVER THE PAST 18 MONTHS, WHICH MIGHT HAVE A BEARING ON TRADE AND MARKETS OF FOREST PRODUCTS OR FOREST MANAGEMENT

Lockdown introduced in Poland at the end of March 2020 caused an unprecedented reduction

of demand for and supply of practically all goods and services. To support entrepreneurs, also in the forest-based sector, the government drawn up a so-called “*Anti-crisis shield*”, i.e. a package of actions and legislative solutions whose aim was to reduce the negative economic effects of restrictions connected with the pandemic. The *Shield* is to stabilise Polish economy and provide it with an investment impulse. Its goal is also to: •protect jobs and assure employees’ safety, •financially support the entrepreneurs, •help health protection, •strengthen the financial system, and •aid public investments. The *Anti-crisis shield* was supplemented with the *Financial shield of the Polish Development Fund for Companies and Employees* (the so-called “financial shield”). The final aid package, resulting from a few modifications of the initial, earned a positive opinion of approximately 50% entrepreneurs so far. The wood companies strive for consideration of the wood industries’ specificity in the introduced protective regulations, especially as regards supply conditions of domestic raw wood material and its consumers, which are largely Western-European states – now in deep recession.

Due to the extraordinary situation of Polish economy caused by the COVID-19 pandemic, the government decided not to draw up the *Multiannual Financial Plan for Poland in 2020*; however, an abridged edition of the *Convergence programme. Revision 2020* was adopted, which normally is part of the *Plan*. This year, the document focuses on the actions taken within the framework of budgeted policy in response to the pandemic and presents a synthetic assessment of current economic situation as well as the perspectives of its development in 2021 (with the reservation, that in current situation the forecasts are burdened with a great risk of error). The *Strategy for Responsible Growth till 2020 (with a time horizon till 2030)* is still the basic strategic document, whose main goal is to support the inclusive economic growth, while maintaining long-term stability of public finance. The *National Programme of Reforms. Revision 2020/2021* defines the lines of the state’s actions aimed at the attainment of the goals of the “*Europe 2020*” strategy. The *Program* points to the most important actions taken in response to the COVID-19 epidemic, presents the assumptions of the investment strategy (according to which investments are to be one of the basic instruments of the return to economic stability and to focus on: •counteracting the negative climate change, •generation of “clean energy”, •sustainable, environmentally-friendly transport, •energy efficiency, and •support of circular economy), and includes the answer to the *Country report – Poland 2020* and recommendations of the European Council.

A vision of Polish economy development till 2030 will be presented in the *Productivity Strategy 2030*, which is being drawn up presently. The main goal of the *Strategy* is productivity growth, also in the forest-based sector, while the economy is neutral to the climate, circular, and data-based. The *Strategy* presents detailed goals in seven areas: natural resources, labour and human capital, investment, organisation and institutions, knowledge, data, and internationalisation. A part of the *Strategy* is the *Policy of Artificial Intelligence Development in Poland in the years 2019-2027*. The *Integrated Skill Strategy 2030* is also being prepared. The *Strategy* is to present the lines and priorities of actions taken to develop the competence important in the context of economic challenges, including digital transformation.

On the other hand, the new *National Security Strategy of the Republic of Poland*, adopted in 2020, defines the vision of building the national security and is a framework for the state’s actions regarding security and defence in the near future. The document points to four pillars of Poland’s security: •security of the state and citizens, •international security, •identity and national heritage, and •social-economic development and environmental protection. The *Strategy* also stresses the significance of cyber security, which becomes more and more important, also in the context of digitalisation and building of Industry 4.0 in the forest-based sector. Enhancing the level of resistance to cyber threats and improving information protection, as well as promoting good practices in this field, is also a goal of the *Cyber Security Strategy of the Republic of Poland for the period 2019-2024* effective since 2019.

Much importance is attached to the *Road map of Transformation towards a closed-loop economy (CLE)* adopted in September 2019, which contains a set of instruments facilitating implementation of a circular economy model in Poland. The document identifies the national CLE priorities, i.e. innovativeness and strengthening of science-industry cooperation, creation of a European recyclables market, assurance of high quality recyclables (as part of sustainable production and consumption), and development of the service sector.

Poland is also active when it comes to the activities of the Central-Eastern European states regarding research and innovation in agriculture and bioeconomy, and was the initiator of the Visegrad Group cooperation in this field as well as one of the creators of BIOEAST initiative. To support this initiative, an international consortium was established, which has been executing *Horizon 2020 BIOEASTsUP2* project since October 2019. There have also been some efforts made to establish a so-called “national cooperation platform”, which is to include an inter-ministerial working group (BIOEAST Ad-hoc Inter-Ministerial Group: BAIMG) and a national stakeholder working group (National Stakeholder Group: NSG) composed of, inter alia, representatives of the inter-ministerial working group, scientists (from research institutes and academia), experts, and representatives of non-governmental institutions.

3. MARKET DRIVERS

Actions taken in the area of the environment and climate are of importance for Polish forest-based sector. In the year 2020, 26 programmes aiding so-called “green investments” were launched. They were addressed not only to entrepreneurs, but also to self-governments and society. Companies can make use of the support for, inter alia: •the development and implementation of innovative technologies in the field of bio-gasworks, CHP plants, energy-saving construction, energy storage (the *New Energy* programme), •investments concerning energy generation from renewable sources and the development of highly effective industrial co-generation, and •investments in ecological electric delivery vans (this programme is addressed to micro, small- and medium-sized companies). Initiatives such as *Adaptation to climate change and mitigation of the environmental threats consequences*, within which the *Climatic city – “green-blue infrastructure”* programme was launched, are continued. This programme finances the best investment solutions concerning the green-blue infrastructure in cities which are to improve the residents’ quality of life and enhance the cities’ resistance to the climate change consequences. Entrepreneurs can also get support of their pro-environment activities from the *Environment, Energy and Climate Change* programme financed by Norwegian Funds. The programme addresses three areas: •renewable energy, energy efficiency, energy safety, •climate change mitigation and adaptation, and •the environment and ecosystems.

Initiatives addressing the improvement of the business environment quality and stimulation of entrepreneurship and investments are also important for the operation of companies in Poland, including companies in the forest-based sector. Among these activities and initiatives one will find: •continuation of digitalisation of public services (e.g. the *e-Tax Office* programme, whose aim is to create an effective online tool for comprehensive dealing with tax matters, mainly concerning VAT, PIT, and CIT), •the *Polish Agency for Enterprise Development Academy* (a project executed within the SME Development Centre) – the project facilitates access to online courses concerning legal, management, marketing and financial matters and helping to develop social skills, •the *Legal support for start-ups* programme, executed by the Polish Agency for Enterprise Development (PARP) and providing legal support for start-ups as regards their cooperation with investors and customers, and •a project of amendments to the *Commercial Partnerships Code* introducing to the legal order *the holding*

law, which regulates private-legal relations between the dominant partnership and its dependant partnerships in a way considering the interest of the creditors, partners and shareholders. Another initiative called *A New Chance Policy* is addressed to micro, small- and medium-sized companies and it introduces regulations on public aid provided in order to rescue or restructure companies having financial difficulties. It is a document which, in a comprehensive manner, describes management of a company in crisis (at various stages of a company's life). The document presents system solutions developed for company owners facing difficulties in running their businesses and for those who plan to start a business again. An amendment to the act *on supporting new investments* is also envisaged for 2020. Its goal is to lower the threshold of 50% of required outlay concerning reinvestment, accelerate and facilitate the issuance process of decisions concerning investment support, and to limit bureaucratic barriers. The tax law is also being revised in order to introduce new solutions, such as lump sum on the revenue of capital partnerships – so-called “*Estonian CIT*” (a modern way of taxation which promotes investments and minimises formalities connected with tax settling is to be effective as of 2021) or a *Slim VAT* package addressed to small- and medium-sized companies (a simple and modern tax which takes into account local specificity).

Support for innovativeness and digitalisation, especially when facing the crisis caused by the COVID-19 pandemic and fierce global competition, is of great importance for the enhancement of the competitiveness of Polish companies. Therefore, the *Accessibility +* programme, entitled *Things are for People*, finances activities in eight thematic areas: architecture, transport, education, health service, digitalisation, services, competitiveness, and coordination (including, inter alia, the projects of new, ergonomic furniture for people with special needs, e.g. sensory furniture), the *Innovativeness Incubator 4.0* programme stimulates commercialisation of scientific research results and the development of science-business cooperation, and the *100 best projects concerning digitalisation enhancement within a company* programme finances digitalisation of micro, small- and medium-sized companies. New regulations concerning tax relief for the purchase of robots, cobots, devices for additive production, software, sensors, and enhanced and virtual reality devices used in design, production or processing are also being drawn up.

4. DEVELOPMENTS IN FOREST PRODUCTS MARKETS SECTORS

4. (A) Wood raw materials

In 2019 43.5 million m³ of roundwood was harvested in Poland (including 0.9 million m³ of roundwood from afforested areas and 0.3 million m³ of forest chips), i.e. over 3 million m³ less than in 2018 (approximately 7%; the increase in harvesting in previous years, to some extent, resulted from the necessity of managing large amounts of roundwood from windfalls caused by the hurricane in 2017). Almost 96% of harvested roundwood (41.6 million m³, 6% less than in 2018) originated from public forests (including 40.9 million m³ originating from the major national supplier – State Forests National Forests Holding), and only 4% from private forests (1.9 million m³, approximately 20% less than the year before). 76% of harvested roundwood were coniferous species (33.3 million m³) and more than 88% of harvested wood was intended for material processing (38.5 million m³ compared to 41.4 million m³ in 2018). The assortment structure of the roundwood was dominated by pulpwood whose share was almost 54% (20.7 million m³, 9% less than in the previous year). Sawlogs accounted for approximately 44% (17 million m³; 4% less than in 2018), and the other industrial wood for 2% (0.8 million m³; 16% less than the year before). In 2019 also 5.1 million m³ of fuelwood was harvested in Poland (95% of the previous year's volume).

Almost 11% of roundwood harvested in Poland was exported in 2019 (4.6 million m³

compared to 5.6 million m³ in 2018). 96% of that roundwood was industrial wood (4.4 million m³; 17% less than in the previous year), of which almost 90% was coniferous wood (3.9 million m³) and 10% deciduous wood (0.5 million m³). 0.2 million m³ of fuelwood was also exported (and it was 16% less than in the previous year). On the other hand, 1.7 million m³ of roundwood was imported to Poland, which meant a 47% increase compared to 2018. Almost all import was industrial roundwood, of which 59% was softwood (0.9 million m³; 90% more than in the previous year), fuelwood import remained at the previous year's level and equalled 62 thou. m³. The import of hardwood increased 15% compared to the previous year and equalled 0.7 million m³, of which 1 thou. m³ was roundwood of tropical species.

For 2020, due to a significant slowdown of Polish economy caused by the coronavirus pandemic, a further drop in roundwood harvesting is forecasted – to 42.5 million m³ (2% less than in 2019), while a slight increase is anticipated no sooner than in 2021 (less than 1% compared to 2019). The assortment structure of harvested roundwood will still be dominated by wood for material processing (its share will remain at a level of more than 88%). As previously, approximately 54% of it will be pulpwood, 44% sawlogs, and 2% the other industrial roundwood. It is estimated that in the years 2020-2021 4.9 million m³ and 5.2 million m³, respectively, of fuelwood will be harvested in Poland. Trends in foreign trade in roundwood should be similar to those observed for roundwood harvesting. It is assumed that, after a drop to 4.3 million m³ in 2020 (a 6% drop compared to 2019), roundwood export will increase to 4.7 million m³ in 2021 (which will mean a 2% increase compared to 2019). Main exports should be roundwood for industrial processing, and fuelwood export will be approximately 0.2 million m³ annually. On the other hand, in the period 2020-2021 Poland should import 1.5 million m³ (13% less than in 2019) and 1.7 million m³ (the level of 2019) of roundwood, respectively. Almost all of it will be industrial roundwood (the quantities of fuelwood imported will be relatively small and will not exceed 100 thou. m³ in the analysed period).

4. (B) Wood energy, with a focus on government policies promoting wood energy

In 2018 the production of renewable energy in Poland decreased to 8.8 million toe from 9.1 million toe in 2017, i.e. 4% (the production of energy in total also decreased 4%). The share of renewable energy within total energy production was 14.31% (compared to 14.22% in the previous year) and within total consumption 8.22% (compared to 8.66% in 2017). As in previous years, the structure of renewable energy carriers was dominated by biomass, from which 6.0 million toe was generated (69% of energy generated from all renewable energy sources (RES)). Largely it was wood biomass. In 2020 the power potential of renewable energy sources in Poland increased to almost 10 GW. Presently, photovoltaics is the fastest developing RES sector – total power of the assembled photovoltaic installations exceeded 2.1 GW. On the other hand, the amount of energy generated by wind power increased to more than 6 GW, by biomass power stations to 1.5 GW and by water power stations to approximately 1 GW.

The renewable power industry sector has also been impacted by the economic slowdown caused by the coronavirus pandemic (closures or stoppages of factories manufacturing devices used in the renewable power industry cause delays in construction of installations and their connection to the electrical power grid, there are also problems with the availability of components manufactured in China). This is counteracted by successively introduced regulations included in the so-called “*Anti-crisis shield*”.

The definition of energy wood was broadened by an act of law (amendment to the act of July 2020 on renewable energy sources). From the 1st October 2020 till the 31st December 2021 energy wood is „raw wood material which does not constitute sawlogs and veneer/peeler logs, which are logs, sawlogs and veneer/peeler logs, and which does not constitute wood material created as a result of a purposeful grinding of said raw wood material” and “by-products which are the effect of raw wood material processing, and not contaminated with substances that are

not found naturally in wood”, and “*waste, which is the effect of raw wood material processing, and not contaminated with substances that are not found naturally in wood, and managed in accordance with the hierarchy of waste management manners*”, which is primarily to prevent the depreciation of the raw wood material remaining in forests due to the lesser demand for it from wood companies in consequence of the pandemic.

Presently, Poland is preparing an energy strategy till 2050. As a target, domestic power industry model will be based on nuclear energy and energy generated from renewable energy sources. Regulations, which will facilitate further acceleration of investments in RES, are being prepared. They include, inter alia, an amendment to regulations restricting the development of the land wind power industry (reduction of the hitherto required distance between a wind power installation and buildings, provided there is social acceptance).

The development of renewable energy sources is aided by programmes addressed to producers (prosumers), such as “*AgroEnergy*”, “*Energy Plus*” or “*My Current*”. “*AgroEnergy*” is a programme addressed to individual farmers, which is to reduce the negative influence of farming on the environment. Investments in new sources of electric and heat energy are co-financed (provided that certain conditions are fulfilled). The “*Energy Plus*” programme is targeted at entrepreneurs and supports initiatives aimed at reduction of harmful emissions to the atmosphere, reduction of the consumption of primary raw materials, improvement of energy efficiency, modernisation/development of heat grids, and the use of geothermal resources for energy generation. The addressees of the third programme, i.e. “*My Current*”, are households and its main goal is to increase the production of energy from photovoltaic micro sources, especially on under-urbanised areas (it is assumed that 200 thou. such installations will be assembled of total power of 1000 MW).

4. (C) Certified forest products

In Poland there are two certifications systems of forest management and wood products, i.e. *FSC – Forest Stewardship Council* and *PEFC – the Programme for the Endorsement of Forest Certification*. Almost 7 million hectares of forests (2020) is certified with FM certificate (*Forest Management Certification*) in the FSC system, i.e. more than 75% of their area in Poland (almost 7% of forests is FSC certified in Europe and 3.5% worldwide). Polish companies also have 2814 valid FSC CoC (*Chain of Custody*) wood product certificates, as in September 2020. On the other hand, FM certificates in the PEFC system cover 7.2 million hectares of forests, i.e. 77% of their area in Poland (approximately 6% of forests is PEFC certifies in Europe and more than 2% worldwide). At the same time, there are 307 valid PEFC CoC certificates in Poland which concern wood products. In the FSC system and the PEFC system alike, most of CoC certificates is held by production companies – primarily manufacturers of sawnwood (of various processing stages), pallets, flooring materials, wood-based panels, wood pulp, paper and paperboards, paper products, and also furniture.

4. (D) Value-added wood products

In Poland primary value-added wood product is furniture. In 2019 the value of its production was PLN 43.7 billion (\$ 11.4 billion, € 10.2 billion) and was 2% higher, in real terms, than in 2018. Almost 70% of furniture production was wooden furniture (PLN 30.3 billion, \$ 7.9 billion, € 7.1 billion), and wooden elements of furniture were of importance in this production for their share within it was 10% (PLN 3 billion, \$ 0.8 billion, € 0.7 billion). In relation to the previous year, the production of wooden furniture was more than 2% higher (in fixed prices). The assortment structure of wooden furniture was dominated (in value terms) by furniture for sitting (with a share of 32%) and furniture for dining rooms and living rooms (23%). More than 81% of wooden furniture manufactured in Poland was exported (PLN 24.6 billion, \$ 6.4 billion,

€ 5.7 billion), which meant an 8% increase in export compared to 2018 (in current prices, in national currency). Primary exported was furniture for sitting (its share within the wooden furniture export value was 35%) and furniture for dining rooms and living rooms (18%), as well as for bedrooms (14%). Poland imported wooden furniture of a value of PLN 2.4 billion (\$ 0.6 billion, € 0.6 billion), i.e. 20% higher than in the previous year (in current prices, in national currency). Import of wooden furniture accounted for 8% of the production value and was dominated by wooden furniture for dining rooms and living rooms and by furniture for sitting (with shares of approximately 17%).

Builder's carpentry and joinery products are also among the value-added wood products in Poland. In 2019 the value of their production was PLN 8.6 billion (\$ 2.2 billion, € 2 billion) and was 1% higher than in 2018 (in fixed prices). Among other things, 19.6 million m² of windows and doors were manufactured (however, it was 3% less than in the previous year), as well as 2.4 million m² of mosaic (in this case a 4% increase was observed) and 55.8 million m² of the other floor panels (10% less than in the previous year). Almost 65% (in value terms) of products from this group was exported (PLN 5.6 billion, \$ 1.5 billion, € 1.3 billion), which meant a 7% increase in their export compared to 2018 (in current prices, in national currency). Major exports were windows and doors. On the other hand, Poland imported builder's carpentry and joinery products of a value of PLN 0.8 billion (\$ 0.2 billion, € 0.2 billion). Their import was 17% higher than in the previous year (in current prices, in national currency) and accounted for 9% of the production value. Major imports were wooden windows and doors.

Production of wooden packaging remained at a level similar to that of 2018 (in fixed prices) and equalled a value of PLN 2.4 billion (\$ 0.6 billion, € 0.6 billion), while pallet production decreased more than 5% (134.4 million pieces was manufactured). Production of crates, boxes and similar packaging increased almost 2% and equalled 60.6 thou. tonnes. Approximately 83% of wooden packaging production was exported (PLN 2 billion, \$ 0.5 billion, € 0.5 billion), meaning an approximately 1% drop in this group of wood products (in current prices, in national currency). At the same time, Poland imported wooden packaging in the amount equalling 13% of the production. The imports' worth was PLN 0.3 billion (\$ 0.08 billion, € 0.07 billion) and it was 9% more than in 2018 (in current prices, in national currency). Both export and import of wooden packaging was dominated by pallets.

Paper products can also be counted as value-added products. In 2019 their production value was PLN 29.5 billion (\$ 7.7 billion, € 6.9 billion) and was more than 6% higher, in real terms, than the year before. Its assortment structure, in value terms, was dominated by corrugated paper and paperboard together with packaging made of it (the share was 62%) and by household articles, toilet and sanitary products (26%). 36% of domestic production of paper products was exported (PLN 10.7 billion, \$ 2.8 billion, € 2.5 billion), and it was almost 10% more than in 2018 (in current prices, in national currency). The export of paper products was dominated by paperboard packaging (with a share of more than 39%). On the other hand, in 2019 Poland imported paper products of a value of PLN 5.4 billion (\$ 1.4 billion, € 1.3 billion), and it was a level similar to the level of the previous year. Again, paperboard products dominated imports to Poland (40% of the value of paper products import).

4. (E) Sawn softwood

In 2019 4.4 million m³ of sawn softwood (together with impregnated and non-impregnated sleepers) was produced in Poland. With a share of 89% it dominated total production of sawn wood. Sawn softwood production was similar to that of the previous year. Poland also imported sawn softwood in the amount of 1.1 million m³ (almost 25% of the production volume) and this amount was 12% larger than in 2018. Approximately 19% of domestic production of sawn softwood was exported (0.8 million m³, i.e. 3% more than in the previous year).

It is anticipated that sawn softwood production will decrease to 4.2 million m³

(approximately 5%) in 2020 and no sooner than in 2021 will it return to the level of 2019 (4.4-4.5 million m³). As in the case of most wood materials and products, this is an effect of the economic slowdown in Poland caused by the coronavirus pandemic. A similar situation will also be observed on the European markets, thus a significant slowdown in foreign trade is also anticipated, especially in 2020. In the period 2020-2021 sawn softwood import may amount to 1-1.1 million m³ and its export to 0.8-0.9 million m³ (which will be 86% and 100%, respectively, and 95% and 101%, respectively, of the levels of 2019).

4. (F) Sawn hardwood

In 2019 hardwood species accounted for approximately 11% (0.6 million m³) of total production of sawn wood in Poland (together with impregnated and non-impregnated sleepers). Sawn hardwood production decreased 8% compared to the previous year. Poland also imported 0.3 million m³ of sawn hardwood (48% of the production volume; 6% less than in 2018), of which 14.5 thou. m³ was sawn tropical wood (88% of the previous year's level). On the other hand, Poland exported 0.2 million m³ of sawn hardwood (34% of the production volume), i.e. over 3% more than the year before.

It is assumed that sawn hardwood production will decrease to 0.5 million m³ in 2020 and amount to almost 0.6 million m³ in 2021 (will not exceed the level of 2019). A slowdown in previous dynamics of foreign trade in sawn hardwood is also anticipated. In the period 2020-2021 sawn hardwood import may amount to 0.2-0.3 million m³ and its export should not exceed 0.2 million m³.

4. (G) Veneer sheets

In 2019 veneer production decreased to 47 thou. m³ in Poland, which meant an almost 20% decrease compared to 2018. Almost 56% of veneers were hardwood. Veneer import was similar to that of the previous year and amounted to 73 thou. m³ (which was 155% of the production volume). Tropical veneer import was insignificant and reached the level of 0.2 thou. m³. On the other hand, Poland exported 29% of domestic production of veneers (13.5 thou. m³; 10% more than the year before).

It is estimated that in the nearest future veneer production will still be lower than in the previous years and amount to 42 thou. m³ in 2020 and 45 thou. m³ in 2021. Polish veneer market will still be supplemented with imports (reaching a level of 71-74 thou. m³ in the years 2020-2021), while veneer export should not exceed 13 thou. m³ in the analysed period.

4. (H) Wood-based panels

In 2019 11.7 million m³ of wood-based panels was produced in Poland and it was 3% more than in 2018. As in previous years, the production assortment structure was dominated by particleboards with a share of 54% (6.3 million m³; their production was 8% higher than in 2018). 15% of them (0.9 million m³) were OSBs (4% less than the year before). The fibreboards' share within total production volume of wood-based panels in Poland was 42% (4.9 million m³ of boards; 1% less than in 2018). Dry-process boards dominated the production with a share of 75% (their production amounted to 3.7 million m³ and was 5% higher than in the previous year). The share of wet-process porous boards was 23% (1.1 million m³; 16% less than in 2018), and that of wet-process hardboards 2% (0.1 million m³; recently, production of these boards has been systematically declining and in 2019 it was 13% lower than the year before). Approximately 4% (0.5 million m³; 11% less than in 2018) of wood-based panel production was plywood. In 2019 Poland imported 3 million m³ of wood-based panels. Their import was 4% lower than in 2018 and corresponded to 26% of domestic production. Approximately 62% of import were particleboards (which amounted to 1.9 million m³ of

panels, meaning a 10% decrease in import compared to the previous year), while approximately 7% of them were OSBs (0.1 million m³). Poland also imported 0.8 million m³ of fibreboards (12% more than in 2018), and these were primarily dry-process fibreboards (0.6 million m³). Domestic production of plywood was supplemented with its import amounting to 0.4 million m³ (which meant a 4% decrease compared to the previous year). Almost 27% of domestic production of wood-based panels was exported (3.1 million m³; the level was similar to that of the previous year). The structure of export was dominated by fibreboards (with a share of 62%; 1.9 million m³), mainly dry-process boards and wet-process porous boards. Poland also exported 0.9 million m³ of particleboards (8% more than the year before, while 41% them were OSBs) and 0.3 million m³ of plywood (its export decreased 15% compared to 2018).

It is estimated that after a slight decrease in 2020 (to 11.5 million m³), wood-based panel production will increase to 11.8 million m³ in 2021. Production of all types of boards should demonstrate an upward trend. It is forecasted that in 2021 the production of particleboards will amount to 6.4 million m³, of fibreboards to 4.9 million m³, and of plywood to 0.5 million m³. No sooner than in 2021 will the import of wood-based panels return to the level of 2019 and amount to 3 million m³, while their export, after the anticipated drop to 2.8 million m³ in 2020, will probably reach a level of approximately 3 million m³ in 2021. The assortment structure of both export and import of wood-based panels should not change much in the analysed years.

4. (I) Pulp and paper

In 2019 wood pulp production amounted to 1.2 million tonnes in Poland and it was 4% less than in 2018 (without pulp from fibres other than wood and pulp from recycled fibres – their production was twice as high as the year before and amounted to 0.1 million tonnes). The production structure was dominated by cellulose with a share of 77% (0.9 million tonnes), semi-chemical pulp and mechanical pulp accounted for almost 18% (0.2 million tonnes), and cellulose pulp for chemical processing for approximately 5% (0.06 million tonnes). In 2019, as in previous years, the import of wood pulp was significant and amounted to 1.1 million tonnes (which was 90% of domestic production); however, it was 6% lower than in 2018 and dominated by cellulose. On the other hand, wood pulp export was relatively insignificant and amounted to 0.1 million tonnes (which was 23% less compared to the previous year and corresponded to less than 10% of domestic production). Similarly to wood pulp import, the export was also almost entirely cellulose.

In the nearest future no significant changes on the wood pulp market are forecasted. Its production should remain at a level of approximately 1.2 million tonnes. Trends similar to those formerly observed should also continue as regards foreign trade in wood pulp. In 2021 wood pulp import may increase to 1.1 million tonnes, and export will probably be 0.1 million tonnes.

In 2019 paper and paperboard production in Poland amounted to 4.9 million tonnes, and it was a production level similar to that reached in the previous year. The assortment structure of the production was dominated by packaging paper (69%, 3.4 million tonnes, a 4% production increase compared to 2018). Approximately 17% of manufactured paper was graphic paper (0.8 million tonnes (including 0.7 million tonnes of non-wood paper), but its production was 1% lower than the year before), and 11% paper for households and sanitary purposes (0.5 million tonnes; also in this case an approximately 5% decrease in production was observed). For many years Polish market in paper and paperboard has been relatively heavily supplemented with import. In 2019 the import volume was 4.3 million tonnes and equalled almost 89% of domestic production (compared to 2018 the import increased almost 1%). Packaging and graphic paper was major imports. On the other hand, Poland exported 2.4 million tonnes of paper (50% of domestic production and 1% less than in 2018). Export was dominated by packaging and graphic paper.

It is forecasted that till 2021 paper and paperboard production will increase to 5 million

tonnes (more than 2% compared to 2019). As regards foreign trade in paper and paperboard in said period, an insignificant increase in both export (to 2.5 million tonnes) and import (to 4.4 million tonnes) is anticipated.

4. (J) Innovative wood products

Modern wood materials have a wide range of applications, are characterised by increasingly better properties, lower emission, biodegradability, resistance to biological factors, and by higher durability. The innovativeness in the wood industry is facilitated by the ecology development and changes in the approach to product aesthetics.

The outlay on innovative activity in Polish wood sector amounted to PLN 1.9 billion (€ 0.4 billion, \$ 0.5 billion) in 2018, which was approximately 9% of its value in industry and almost 11% in manufacturing. The outlay was 30% lower (in current prices) than the year before. More than 63% of it was the outlay of the wood industry (PLN 1.2 billion, an almost two-fold increase compared to 2017), 26% of the pulp and paper industry together with paper processing (PLN 0.5 billion, 70% less than in the previous year), and almost 11% of the furniture industry (PLN 0.2 billion, a 48% decrease compared to the previous year). In 2018 approximately 14% of wood industry companies, 28% of pulp and paper industry companies (including paper processing), and 19% of furniture manufacturers were innovatively active (in manufacturing the percentage was 27%). The outlay on innovations in the wood sector was mainly intended for investments in fixed assets and intangible assets and amounted to 90% of the outlay in the wood industry, to 84% in the pulp and paper industry together with paper processing, and to 42% in the furniture industry (the percentage in industry in general was 53% and in manufacturing 47%). The innovations were primarily financed by own resources of wood industry companies (approximately 71%). Net income from the sale of new or improved products was 10% of total net income in the wood industry, 15% in the pulp and paper industry (together with paper processing) an almost 7% in the furniture industry, while the percentage for industry was 10% and for manufacturing almost 12%.

4. (K) Housing and construction

In 2019 construction and assembly production increased 1.1% in real terms in Poland (compared to 14.6% in the previous year) and equalled PLN 224.2 billion (€ 52.2 billion, \$ 58.4 billion). The increase concerned all categories and it was the greatest in the case of construction of civil engineering facilities (2.1%). Employment in construction also increased slightly (1.8%; 652 thou. people).

Housing also developed relatively well in 2019. The number of dwellings completed increased 12.1% compared to the previous year (as regards dwellings intended for sale or let the increase was 17%). The increase in the number of dwellings whose construction had been commenced was 6.9% and the increase in the number of dwellings with issued construction permits or a filed construction project 4.4%. The number of dwellings under construction increased 3.8%.

In H1 of 2020 an economic slowdown was observed in construction, as was in entire economy. The worse economic conditions resulted from the coronavirus pandemic and temporary stoppage of the economy. The construction and assembly production sales increased only 2.3% compared to the corresponding period of the previous year (however, in the category “erection of buildings” a 1.8% decrease was recorded), and the increase in the number of dwellings completed was also only 2.7%. A decrease in numbers was observed in the case of dwellings whose construction had been commenced and dwellings with issued construction permits (13.4% and 5.5%, respectively). A favourable factor was that the number of dwellings under construction was still 1.5% higher than the year before.

In H2 of 2020 the general economic conditions in construction are assessed less and less negatively, mainly due to better than before forecasts for the development of the economy in general and also due to a package of domestic and foreign orders as well as the financial situation of construction companies. These companies point to the sustaining uncertainty as to the general economic situation in Poland and abroad and to the increase in employment costs as major barriers to their development. Construction industry uses approximately 77% of its production capacity (July 2020), which is 10 percentage points less than the year before. Most of companies (74%) are willing to take actions to mitigate the negative effects of the pandemic (if the pandemic-related restrictions will be maintained, then only approximately 35% of companies assume that they can survive in the market for more than six months).

Due to a significant shortage of dwellings in Poland (the estimate is 1.3-2.2 million), wooden construction is an important, a priority even, element of the housing support programmes recently. Wooden construction is in line with the actions envisaged in the National Housing Programme (an instrument for the implementation of the *Responsible Development Strategy*), which are based on the *Dwelling Plus* package. The programme assumes erection of single-family wooden houses and apartments in multi-family wooden houses. These investments are being executed by Polskie Domy Drewniane company (PDD S.A.), whose main line of business is „*energy-saving wooden construction encompassing erection of residential buildings, management of these buildings and letting of residential buildings or apartments with the option of their sale*”. Despite this, according to experts, wooden houses still account for only 6-7% of single-family buildings completed annually in Poland.

The energy-saving construction, including wooden construction, is also in line with the *Energy-saving construction. Reduction of energy consumption in construction* programme, which can finance (till 2022) initiatives such as thermal modernisation of public buildings (museums, hospitals, culture centres, religion centres, education and scientific centres etc.) and equipping them with devices complying with the highest standards of energy efficiency or with energy management systems.

Table 1

Economic indicators

Indicator	2014	2015	2016	2017	2018	2019
	% change on previous year (in real terms)					
Gross Domestic Product	103.3	103.8	103.1	104.9	105.3	104.1
Sold production of industry	104.1	106.0	103.6	106.2	105.4	103.9
Construction and assembly production	105.9	103.7	97.6	110.9	114.7	101.1
Dwellings completed	98.6	103.2	110.6	109.2	103.8	112.1
Dwellings under construction	100.7	103.0	101.5	103.8	104.9	103.8
Average paid employment						
- total	101.4	101.3	103.1	102.9	101.9	101.5
- in the enterprises sector	100.6	101.3	102.8	104,5	103.5	102.7
Registered unemployment rate (at the end of the year) ¹	11.4	9.7	8.2	6.6	5.8	5.2
Average monthly gross real wages and salaries						
- total	103.2	104.5	104.3	103.7	105.4	104.8
- in the enterprises sector	103.7	104.5	104.4	103.9	105.4	104.1
Price indices of consumer goods and services (inflation)	100.0	99.1	99.4	102.0	101.6	102.3
Investment outlays	109.5	107.1	88.8	106.5	115.4	106.9
Trade						
millions of PLN, current prices						
Exports	693471.6	750835.8	803477.8	882619.5	951324.2	1023591,4
Imports	704567.5	740973.3	786470.1	880078.4	970830.8	1018479,0
Balance of trade	-11095.9	+9862.5	+17007.7	+2541.1	-19506.6	+5112,4
millions of USD, current prices						
Exports	222339.4	200342.8	205047.7	231591.3	264786.0	267062,9
Imports	225898.5	197682.1	200672.4	231034.9	270157.6	265758,7
Balance of trade	-3559.1	+2660.7	+4375.3	+556.4	-5371.6	+1304,2
millions of EUR, current prices						
Exports	165773.6	179578.2	184842.9	206647.3	223596.4	238147,5
Imports	168432.3	177232.9	180924.6	206084.4	228172.3	236976,0
Balance of trade	-2658.7	+2345.3	+3918.3	+562.9	-4575.9	+1171,5

¹ as a ratio of registered unemployed persons to the economically active civil population



TF1

TIMBER FORECAST QUESTIONNAIRE Roundwood

Country: Poland	Date: 11.09.2020
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Product Code	Product	Unit	Historical data		Revised	Estimate	Forecast
			2018	2019	2019	2020	2021
1.2.1.C	SAWLOGS AND VENEER LOGS, CONIFEROUS						
	Removals	1000 m ³ ub	14963,692	14 342	14269,008	14 100	14 300
	Imports	1000 m ³ ub	140,075	200 #	256,507	200	250
	Exports	1000 m ³ ub	1625,860	1 000 #	1808,871	1 700	1 800
	Apparent consumption	1000 m ³ ub	13477,907	13 542	12716,644	12 600	12 750
1.2.1.NC	SAWLOGS AND VENEER LOGS, NON-CONIFEROUS						
	Removals	1000 m ³ ub	2830,018	2 780	2730,698	2 600	2 800
	Imports	1000 m ³ ub		80 R#			
	Exports	1000 m ³ ub		150 R#			
	Apparent consumption	1000 m ³ ub		2 710			
1.2.1.NC.T	of which, tropical logs						
	Imports	1000 m ³ ub	0,780	1 #	1,137	1	1
	Exports	1000 m ³ ub	0,066	0 #	0,074	0	0
	Net Trade	1000 m ³ ub	0,714	1	1,063	2	1
1.2.2.C	PULPWOOD (ROUND AND SPLIT), CONIFEROUS						
	Removals	1000 m ³ ub	17366,632	15 933	15780,956	15 500	15 900
	Imports	1000 m ³ ub	358,700	600 #	690,316	600	700
	Exports	1000 m ³ ub	3076,274	1 600 #	2133,888	2 050	2 200
	Apparent consumption	1000 m ³ ub	14649,058	14 933	14337,384	14 050	14 400
1.2.2.NC	PULPWOOD (ROUND AND SPLIT), NON-CONIFEROUS						
	Removals	1000 m ³ ub	5258,586	4 922	4886,371	4 700	5 000
	Imports	1000 m ³ ub		560 R#			
	Exports	1000 m ³ ub		75 R#			
	Apparent consumption	1000 m ³ ub		5 407			
3	WOOD CHIPS, PARTICLES AND RESIDUES						
	Domestic supply	1000 m ³	10523,775 N	10 650 C	9393,206	9 200	9 500
	Imports	1000 m ³	2155,120	2 796 C	3004,478	2 800	3 000
	Exports	1000 m ³	868,682	562 C	665,278	600	550
	Apparent consumption	1000 m ³	11810,213	12 884	11732,406	11 400	11 950
1.2.3.C	OTHER INDUSTRIAL ROUNDWOOD, CONIFEROUS						
	Removals	1000 m ³ ub	875,421 N	818 N	726,671	650	700
1.2.3.NC	OTHER INDUSTRIAL ROUNDWOOD, NON-CONIFEROUS						
	Removals	1000 m ³ ub	58,370 N	58 N	58,327	50	60
1.1.C	WOOD FUEL, CONIFEROUS						
	Removals	1000 m ³ ub	2685,746 N	2 636 N	2504,929	2 400	2 550
1.1.NC	WOOD FUEL, NON-CONIFEROUS						
	Removals	1000 m ³ ub	2672,760 N	2 595 N	2563,973	2 500	2 600

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These data are flagged with E, R, N or C for secretariat estimate, repeat, national estimate or calculated totals (from subitems). If there is no flag, this indicates officially supplied

N - National estimate

Residues - production excluding recovered wood

Trade turnover is based only on data from the SAD document and Intrastat declaration; real data, without estimation of values of trade turnover realized by those parties which are

Roundwood: sawlogs and veneer logs and pulpwood and wood fuel - with removals from trees and shrubs outside the forest, including forest chips, with stump

Roundwood removals underbark

red colour - corrected data



UNECE
TF2
TIMBER FORECAST QUESTIONNAIRE
Forest products

Country: Poland Date: 11.09.2020
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Product Code	Product	Unit	Historical data		Revised 2019	Estimate 2020	Forecast 2021
			2018	2019			
6.C	SAWNWOOD, CONIFEROUS						
	Production	1000 m ³	4400,468	4 400	4442,500	4 200	4 450
	Imports	1000 m ³	983,939	1 077	1105,454	950	1 100
	Exports	1000 m ³	822,360	862	845,142	800	850
	Apparent consumption	1000 m ³	4562,047	4 615	4702,812	4 350	4 700
6.NC	SAWNWOOD, NON-CONIFEROUS						
	Production	1000 m ³	612,375	600	563,184	500	550
	Imports	1000 m ³	285,477	277	267,872	220	250
	Exports	1000 m ³	183,622	179	190,118	140	160
	Apparent consumption	1000 m ³	714,230	698	640,938	580	640
6.NC.T	of which, tropical sawnwood						
	Production	1000 m ³	0,012	0	0,000	0	0
	Imports	1000 m ³	16,553	15	14,488	14	15
	Exports	1000 m ³	1,859	2	1,956	2	2
	Apparent consumption	1000 m ³	14,706	13	12,532	12	13
7	VENEER SHEETS						
	Production	1000 m ³	59,077	57 C	47,140	42	45
	Imports	1000 m ³	73,843	77 C	73,204	71	74
	Exports	1000 m ³	12,310	17 C	13,524	12	13
	Apparent consumption	1000 m ³	120,610	117	106,820	101	106
7.NC.T	of which, tropical veneer sheets						
	Production	1000 m ³	0,565	1	0,550	1	1
	Imports	1000 m ³	0,202	0	0,214	0	0
	Exports	1000 m ³	0,025	0	0,017	0	0
	Apparent consumption	1000 m ³	0,742	1	0,747	1	1
8.1	PLYWOOD						
	Production	1000 m ³	583,166	590 C	518,746	480	530
	Imports	1000 m ³	385,342	372 C	369,031	340	370
	Exports	1000 m ³	335,983	414 C	286,245	250	300
	Apparent consumption	1000 m ³	632,525	548	601,532	570	600
8.1.NC.T	of which, tropical plywood						
	Production	1000 m ³	3,124	4	3,225	3	3
	Imports	1000 m ³	5,450	5	4,193	4	5
	Exports	1000 m ³	0,422	0	0,254	0	0
	Apparent consumption	1000 m ³	8,152	9	7,164	7	8
8.2	PARTICLE BOARD (including OSB)						
	Production	1000 m ³	5863,518	6 250	6327,494	6 350	6 380
	Imports	1000 m ³	2063,037	2 043	1871,806	1 750	1 850
	Exports	1000 m ³	829,857	867	898,312	840	870
	Apparent consumption	1000 m ³	7096,698	7 426	7300,988	7 260	7 360
8.2.1	of which, OSB						
	Production	1000 m ³	975,394	1 100	938,055	950	990
	Imports	1000 m ³	110,367	123	124,257	100	120
	Exports	1000 m ³	386,511	409	364,100	380	410
	Apparent consumption	1000 m ³	699,250	814	698,212	670	700
8.3	FIBREBOARD						
	Production	1000 m ³	4921,938	4 850 C	4867,641	4 650	4 910
	Imports	1000 m ³	700,804	752 C	783,674	752	805
	Exports	1000 m ³	1936,989	1 960 C	1922,401	1 700	1 800
	Apparent consumption	1000 m ³	3685,753	3 643	3728,914	3 702	3 915
8.3.1	Hardboard						
	Production	1000 m ³	117,013	100	102,345	100	100
	Imports	1000 m ³	156,260	15 E	141,820	140	160
	Exports	1000 m ³	416,640	42 E	406,542	300	300
	Apparent consumption	1000 m ³	-143,367	72	-162,377	-60	-40
8.3.2	MDF/HDF (Medium density/high density)						
	Production	1000 m ³	3485,279	3 450	3655,906	3 500	3 700
	Imports	1000 m ³	535,083	721 E	628,498	600	630
	Exports	1000 m ³	719,361	1 068 E	659,558	600	650
	Apparent consumption	1000 m ³	3301,001	3 103	3624,846	3 500	3 680
8.3.3	Other fibreboard						
	Production	1000 m ³	1319,646	1 300	1109,390	1 050	1 110
	Imports	1000 m ³	9,461	17	13,356	12	15
	Exports	1000 m ³	800,988	849	856,301	800	850
	Apparent consumption	1000 m ³	528,119	467	266,445	262	275
9	WOOD PULP						
	Production	1000 m.t.	1258,312	1 235 C	1210,883	1 220	1 240
	Imports	1000 m.t.	1161,964	1 063 C	1087,446	1 060	1 090
	Exports	1000 m.t.	149,384	97 C	114,321	110	120
	Apparent consumption	1000 m.t.	2270,892	2 201	2184,008	2 170	2 210
12	PAPER & PAPERBOARD						
	Production	1000 m.t.	4856,027	4 860 C	4879,733	4 880	5 000
	Imports	1000 m.t.	4288,355	4 321 C	4322,588	4 300	4 350
	Exports	1000 m.t.	2449,097	2 484 C	2425,412	2 400	2 450
	Apparent consumption	1000 m.t.	6695,285	6 697	6776,909	6 780	6 900
5.1	WOOD PELLETS						
	Production	1000 m.t.	1174,436	1 300 E	1405,800	1 400	1 450
	Imports	1000 m.t.	188,643	144	251,447	200	240
	Exports	1000 m.t.	751,194	404	743,008	700	750
	Apparent consumption	1000 m.t.	611,885	1 040	914,239	900	940

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N - National estimate

Sawnwood - with sleepers (impregnated and non-impregnated)

Trade turnover is based only on data from the SAD document and Intrastat declaration; real data, without estimation of values of trade turnover realized by those parties which

Plywood (product code 8.1) - no bamboo plywood

Wood pulp (product code 9) is reported in metric tonnes (no air-dry weight)

Wood pulp - excluding pulp from fibres other than wood and excluding pulp from recovered fibre pulp

red colour - corrected data