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COVID-19 impacts on the forest sector in Eastern Europe, Caucasus and Central Asia



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ECE/TIM/DP/88

Timber Section, Geneva, Switzerland

GENEVA TIMBER AND FOREST DISCUSSION PAPER 88

COVID-19 impacts on the forest sector in Eastern Europe, Caucasus and Central Asia



UNITED NATIONS

Geneva, 2021

Note

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This work is co-published by the United Nations (UNECE) and FAO.

Abstract

This report summarizes the impacts that the COVID-19 pandemic had during 2020 in the forest sector of the countries in Eastern Europe, the Caucuses and Central Asia (EECCA) (Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan), focusing on production, export, import, consumption, prices and employment of the main wood products: roundwood, sawnwood, wood-based panels, wooden furniture, paper and paperboards. It also covers the recovery measures implemented by EECCA governments. Data from various sources, such as official statistics, international data bases, as well as interviews with forest products companies were used for their views on the impact of COVID-19.

ECE/TIM/DP/88

UNITED NATIONS PUBLICATION
eISBN 978-92-1-001293-5
ISSN 1020-7228
eISSN 2412-1304

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Acknowledgements

The secretariat of the UNECE/FAO Forestry and Timber Section wish to thank the author of this paper, Igor Novoselov for providing his insights and expertise on forest products markets and the forest products industry in the EECCA. In addition, the secretariat would like to thank Oliver Stefan Wolf for producing the graphics.

List of abbreviations

COVID-19	coronavirus disease of 2019
Q1	first quarter
Q2	second quarter
Q3	third quarter
Q4	fourth quarter
	Europe, Eastern Europe, Caucasus and Central
EECCA	Asia
m ³	cubic metre
m ²	square metre
YoY	year over the previous year
MDF	medium-density fibreboard
HDF	high-density fibreboard
OSB	oriented strand board
GDP	gross domestic product
IMF	International Monetary Fund
UNDP	United Nations Development Programme
n.a.	not available
km	kilometre
SMEs	small and medium sized enterprises

1. INTRODUCTION AND OVERVIEW

The COVID-19 pandemic impacted all industries and services around the world. However, according to tentative 2020 performance results, the timber sector will not likely be classified as a severely affected sector of Eastern Europe, the Caucasus and Central Asia (EECCA) national economies. Production and trade chains were disrupted, but most bigger companies were able to maintain operations and employment. Most of the governmental support measures were aimed at small and medium-sized enterprises (in all industries), without any special programs or support measures specifically aimed at the timber sector. The imposed quarantines led to significant reductions to personal income in the whole of 2020, however income levels were rebounding in Q3 – Q4 of 2020.

The economic shock to the global economy in 2020, resulting from the spread of COVID-19 is different from previous recessions. The key driver for reduced economic activity in 2020 was the imposition of restrictive measures in most countries of Eastern Europe, the Caucasus and Central Asia (EECCA). These measures were aimed at slowing the spread of the COVID-19 infection and metering the load on the healthcare system at a sustainable level. However, harsh lockdowns were not imposed in all countries, such as Belarus or Turkmenistan.

Restrictive measures adopted to prevent the spread of the COVID-19 epidemic had the effect of an initial shock, which led to a temporary gap in production, trade supply chains and slower activity in EECCA economies. The effect that these measures have had on production and consumption generally correlated with the severity of the restrictions.

In the Russian Federation, restrictive measures associated with Covid-19 had an extremely negative impact on demand for many timber products during the pandemic's first wave (April – May 2020), due primarily to inter-regional lockdowns imposed.

The Russian timber industry, being export oriented and strongly integrated in the global

market, also faced the imbalance between demand and supply and felt the disruption of global product supply chains. Timber product exports were temporarily halted in many locations, due to closure or suspension of operations at border-crossing stations.

The biggest urban centres in the Russian domestic market – the Saint Petersburg and Moscow metropolitan areas – were effectively closed for deliveries. Forest products were stockpiled at production sites and traders' warehouses. Numerous wood-processing companies moved their employees to remote work.

Nevertheless, the timber sector is not one of the most affected industries in EECCA countries. Challenges with selling finished products, however, were primarily experienced by plywood, other wood-based panels and furniture producers. During the April – May 2020 lockdowns, furniture and wood-based panels production in the Russian Federation dropped by 40-50% YoY (year over the previous year). Several wood-based panel plants were shut down completely. Many enterprises utilized the downtime for preventive maintenance, which made the best of a bad situation and helped avoid employee layoffs. The net result is that forest products production in 2020 rebounded strongly, almost making up for the declines caused in Q2 and Q3 of the year.

At the end of Q3 – beginning of Q4 2020, a strong shortage of particleboard/laminated particleboard, MDF/HDF and flooring materials occurred in the Russian market. According to WhatWood estimates, the volume of particleboard shortage was 30,000 – 40,000 m³ per month. The shutdown of several producers for reasons unrelated to COVID-19 also contributed to this and resulted in a shortage that caused prices to roughly double in August 2020 (WhatWood, 2020a).

The Russian sawmill sector continued purchasing raw materials throughout 2020, with sawnwood (softwood and hardwood) production growing by 2.2%. However, sawnwood exports dropped by 4.6% in 2020.

Russian pulp and paper mills did not suspend operations, as most were deemed necessary because they also produce power. Paper and paperboard production were up by 4.9% YoY in

2020, as was wood pulp production, (up by 6.9% YoY).

In general, the timber sector of EECCA countries performed well, in comparison to the general economic downturn. This was to the result of timely support measures by governments and a prompt response of timber industry companies, as well as specific features of the timber business. Demand for rural real estate and construction of country homes (predominantly wooden) remained much higher than in previous years. This spurred the demand for timber products.

This study is an ad hoc assessment of the effects of COVID-19 on the forest sector in the EECCA and had to rely on the information available as of early 2021.

2. ECONOMIC IMPACTS IN THE EECCA

2.1 General economic impact

According to preliminary IMF estimates for 2020, the economies of most EECCA countries demonstrated negative performance in 2020, however, GDP trend in Tajikistan (+4.5%), Turkmenistan (+0.8%) and Uzbekistan (+1.6%) were positive (table 1) (IMF, 2021).

Turkmenistan. In 2020, GDP in Turkmenistan increased by 5.8%. Retail sales grew by 18%. These trends were supported by several government measures. Investments in various sectors were made, specifically in the chemical and polymer industries. Turkmenistan is actively developing trade with foreign countries, increasing its export of electrical energy, fertilizers, textile, petrochemical products, and natural gas. Exports of gas and petroleum products from Turkmenistan in 2020 were \$4.13 billion, with investments in the oil and gas industry at about \$2 billion during the first 11 months of 2019. The share of privately owned enterprises in Turkmenistan grew from 65.7% to 71.2% in 2020 (Voice of the CIS, 2021).

Tajikistan. In 2020, Tajikistan GDP grew by 4.5%. Industrial output increased by 9.7%, agriculture output grew by 8.8%; the foreign trade turnover was up by 0.8% and exports increased by 19.8%. Over 5.4 billion somoni (\$534 million) of foreign investment was made

in various industries of the national economy, including 1.3 billion (\$113 million) somoni of direct foreign investment. In 2020, the country built and commissioned 300 new industrial enterprises, creating 6,500 jobs: 157 regular schools, 108 healthcare institutions and more than 1.2 million square meters of residential space (Finmarket, 2021a).

Uzbekistan. As of the end of 2020, Uzbekistan's economy avoided a recession and grew by 0.6%. The output of agricultural, timber and fishing industries grew by 3%. The first surge in the number of people infected with COVID-19 occurred in this country in July 2020. The country's authorities began to relax COVID-19 quarantine measures step by step starting from August 15. The consumer price index in December 2020 was up 11.1% compared to December 2019. Foreign trade turnover dropped by 13.1%, down to \$36.3 billion. Exports were \$15.1 billion – down by 13.4%. Imports also dropped, by 12.8%, down to \$21.2 billion. Restrictive measures addressing the COVID-19 situation largely avoided complete shutdowns (Review.uz, 2021).

Over the first months of the lockdown, production and service from 196,000 enterprises dropped significantly, while about 95,000 individual businesses suspended their activities. The service sector was hit particularly hard: 13,000 public catering facilities, 45,000 retail and trade facilities, 19,000 service businesses and 7,000 transport enterprises were forced to curtail operations or lost a great deal of income (UNDP, 2020).

Ukraine. According to the Ministry of Economy, Ukraine's GDP dropped by an estimated 4.7% in 2020. The production index dropped by 5.2%. Additionally, the following indicators of economic activity declined: industry (–6.2%), mining industry (–3.8%); metal industry (–10.2%); processing industry (–7.8%); machine building (–19.9%); power engineering (–3.1%); textile industry (–9%) (all figures are YoY). The unemployment rate remained at 9.7% as of the end of 2020, 1% higher than in 2019 (State Service of Statistics of Ukraine, 2021).

Belarus. The GDP of Belarus dropped by 0.9% in 2020. Belarus industrial output declined by 0.7% in 2020; mining output, by 2.2%; processing output, by 0.2%. timber, paper products and printing (+14.7%), pharmaceutical

products (+10.1%), foodstuffs, beverages and tobacco products (+2.7%), vehicles and equipment (+5%) (all percentage comparisons are 2020 vs. 2019). The unemployment rate as of the end of 2020 was 4.6% (tut.by, 2021).

Russian Federation. Russian GDP declined by 3.1% in 2020 (the biggest drop in the past 11 years). Industrial output in the Russian Federation dropped by 2.9% in 2020. Consumer goods (+1.1%) and woodworking (+0.5%) increased slightly. Production of natural resources (oil and minerals) dropped by 7.0% based on the results of 2020; of which the oil and gas component was down by 8.1%. Coal production dropped by 6.3%. Electricity use dropped by 3.2%. Metal output declined by 2.4%. Based on the results of 2020, the unemployment rate in the country grew from 4.7% to 6.3% (all percentage comparisons are 2020 vs. 2019) (TASS, 2021a).

Kazakhstan. The GDP of Kazakhstan shrank by 2.6% in 2020. Growth rates in agriculture, timber and fishing industries increased by 5.6%; and construction by 11.2%. Industrial production dropped by 0.7%; retail turnover by 8.7% (Kursiv, 2021a). The country's unemployment rate remained at 5% in 2020 (Kursiv, 2021b) (all percentage comparisons are 2020 vs. 2019) (TASS, 2021b)).

Kyrgyzstan. The country's GDP dropped by 8.6% in 2020. Kyrgyzstan industrial output dropped by 6.6%. Petroleum products output dropped by 59%; timber and paper products and printing activity, by 13%; rubber and plastic goods, by 7%; foodstuffs (including beverages) and tobacco products, by 7%. Volume reduction in construction, as well as in wholesale and retail trade, reached 16%, while agricultural output grew by 1.1% (all percentage comparisons are 2020 vs. 2019) (National Statistical Committee of the Kyrgyz Republic, 2021).

Azerbaijan. Industrial output in Azerbaijan was 5% lower in 2020. According to the Federal State Statistic Service (Interfax-Azerbaijan, 2021), the reduction was caused by production in the oil sector dropping by 6.9% over the reporting period. If the-oil sector was excluded, industrial output grew by 12.5% in 2020. The mining industry, which includes oil and gas, accounted for 61.3% of production output; manufacturing, for 32.5%; electrical energy, gas and steam

generation and distribution, for 5.3%; water supply, treatment and waste recycling, for 0.9%. Over the reporting period, growth within the processing industry was recorded in production of pharmaceuticals (+970%), electrical equipment (+860%), woodworking and timber goods (+67.4%), other vehicles (47%), paper and cardboard (+36.9%), cars, trailers and semitrailers (+35.7%), computers, electronics and optical products (+34.5%), clothes (+32.7%), chemical products (+20.5%), rubber and plastic goods (+13.5%), metal products (+11.9%), textile industry products (+7.4%), finished metal products (+7.3%), as well as leather, leather goods and shoes (+4.7%). In 2020, a reduction occurred in the output of the food industry (-2.1%), printed products (-2.3%), petroleum products (-3.6%), machine- and equipment-building (-5.1%), tobacco products (-7.9%), beverages (-13.7%), furniture (-26.2%); and also in machine and equipment installation and repair (-41.3%) and construction materials production (-0.1% (all percentage comparisons are 2020 vs. 2019) (Interfax, 2021).

Armenia. The Central Bank of Armenia (2021) estimates that GDP dropped by 7.8% in 2020 (Finmarket, 2021b). Industrial output shrank by 0.2%; of this: textile output, by 31% and printing operations, by 21.9%. A sharp decline in imports (17.7%) with moderately lower export (3.9%) reduced Armenian foreign trade deficit by 28.4%. The downturn in the Armenian economy was caused by a sharp reduction in consumption and investment (9% and 31% respectively), which were only partially offset by increased public spending and reduced import (all percentage comparisons are 2020 vs. 2019). The most severely affected sectors were construction and services, while the financial sector and the information & communications technology sector remained more stable (Finport, 2021).

Georgia. The Georgian GDP dropped by 6.1% in 2020. A significant downturn occurred in construction, the processing industry, entertainment and recreation sector, hospitality business, transport and warehousing sectors, as well as wholesale and retail trade. Growth was recorded in financial and insurance operations, in water supply, waste management, information & communications and the mining industry (Finmarket, 2021c).

Table 1 Real GDP growth (Annual percent change)

	1993-1995	1996-2000	2001-2005	2006-2010	2011-2015	2016-2020	2020	2021-2025*
Belarus	-10.1	6.36	7.50	7.36	1.22	0.26	-0.9	1.04
Russian Federation	-8.5	1.78	6.14	3.72	1.92	0.34	-3.1	2.66
Ukraine	-16.4	-1.84	7.70	1.40	-2.14	0.86	-4.2	3.72
Moldova	-11.2	-2.42	7.08	3.34	3.78	2.44	-7.5	4.22
Azerbaijan	-18.6	7.00	12.68	16.96	2.04	-0.64	-4.3	1.82
Armenia	-0.2	4.80	12.60	4.38	4.42	3.20	-7.6	3.78
Georgia	-12.4	5.76	7.36	5.38	4.96	2.52	-6.1	5.04
Kazakhstan	-10.0	2.56	10.38	6.28	4.72	2.22	-2.6	3.80
Kyrgyzstan	-12.7	5.64	3.82	4.32	4.94	1.00	-8.0	4.6
Tajikistan	-15.0	2.92	9.36	6.62	7.00	5.96	4.5	4.30
Uzbekistan	-2.8	4.42	5.36	8.28	7.48	4.46	1.6	5.36
Turkmenistan	-11.5	4.76	16.20	10.42	10.56	5.40	0.8	4.02

Note: * = forecast.

Source: IMF, 2021.

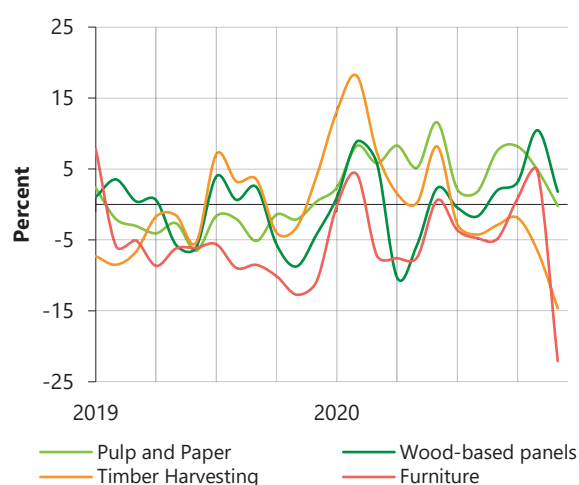
2.2 Forest industries impact

Most of the EECCA countries reduced the output and consumption of timber products during the peak of government restrictions put in place to address the COVID-19 pandemic. The recovery in production and consumption, began in the third and fourth quarters (Q3–Q4) of 2020, following the lifting of restrictions. The last quarter of 2020 was relatively calm, which allowed enterprises to regain the usual rhythm of activity and ramp up production. Thus, despite all the difficulties, the economies of the EECCA countries have shown resilience.

Russian Federation. The output of most types of wood products in the Russian Federation declined during the lockdown peak of April–May 2020 (graph 1 and table 2)). The output of wood-pulp, paper, and cardboard did not decline in any month of 2020. The output of particleboard and MDF fell by 30–40% in Russia in April–May 2020 vs. the same period of 2019. Some plants had to suspend their activities for two or more weeks. As of the end of 2020, production recovered in Q3–Q4 of 2020

and capacity utilization of all operating wood-based panel plants in November–December 2020 reached 100–110% (Bank of Russia, 2021).

Graph 1 Production of main timber products in the Russian Federation (compared to the same month the previous year)



Source: WhatWood, 2021.

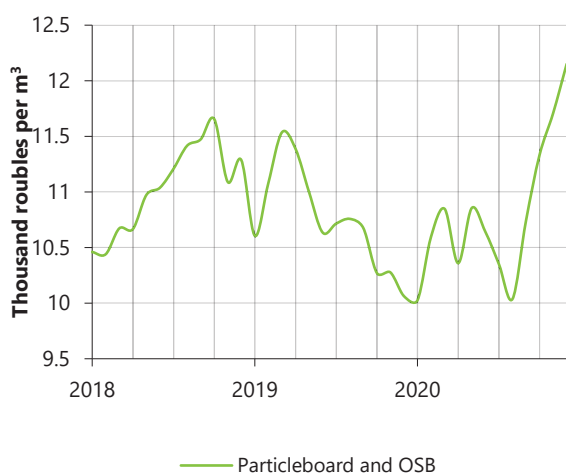
Table 2 Production of forest products growth in 2020 vs. 2019

	Change % 2019-2020
Paper and paperboard	4.9%
Wood pulp	6.9%
Fiberboard /MDF/HDF/	-6.3%
Forest harvesting	-0.6%
Sawn softwood and hardwood	2.2%
Particleboard and OSB	-2.5%
Plywood	-2.7%
Veneer	-10.8%
Wood chips	7.6%
Furniture	8.0%

Source: WhatWood, 2021.

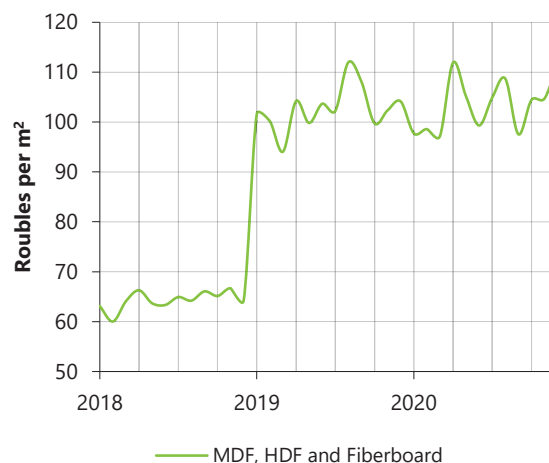
Prices. The rise in prices for all non-food goods in Russia accelerated in Q2 2020 (Worldbank, 2021). The rise in prices for forest products in the Russian Federation were not as strong as in other retail segments, on the whole. A particularly sharp surge in prices for wood-based panels occurred in Russia in Q2 2020 and another surge happened during Q4, the traditional high-demand season (graphs 2 - 6). Between July and November 2020, the retail prices for particleboard increased by 52%, for MDF – 43%, for laminated medium density fibreboard (LMDF) – 34%. High density fibreboard (HDF) prices increased by 70% for some items (WhatWood, 2020a).

Graph 2 Russian Federation: particleboard and OSB producer prices



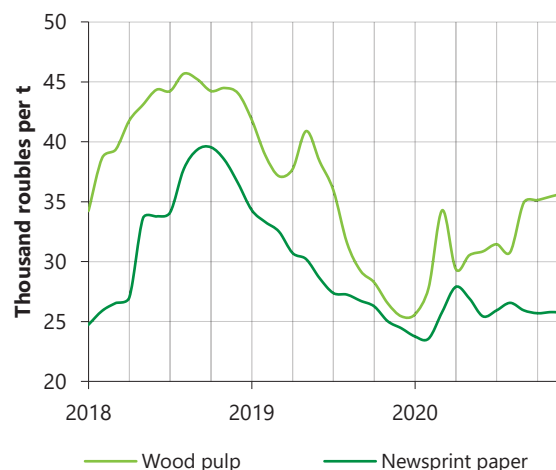
Source: WhatWood, 2021.

Graph 3 Russian Federation: MDF/HDF/Fiberboard producer prices



Source: WhatWood, 2021.

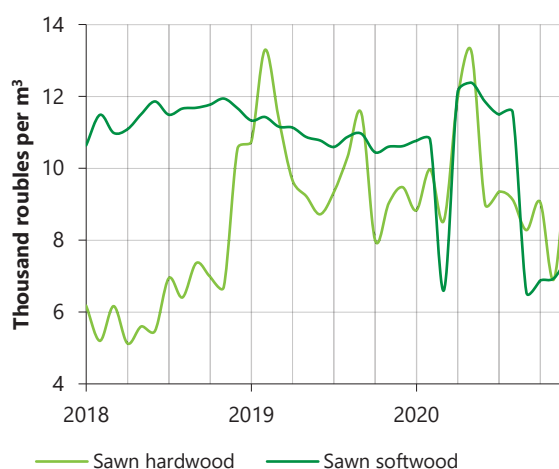
Graph 4 Russian Federation: wood pulp and newsprint producer prices



Note: Excludes VAT

Source: WhatWood, 2021.

Graph 5 Russian Federation: sawn softwood and hardwood producer prices



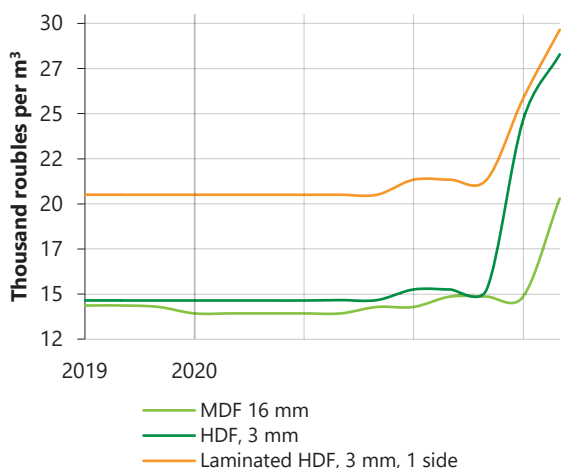
Note: Excludes VAT.

Source: WhatWood, 2021.

The increased demand for wood-based panels was the result of two categories of factors: seasonal demand and an increase unique to 2020:

- The seasonal demand for wood-based panels, furniture, decorative elements traditionally increases at the end of the construction season and upon commissioning of housing at the end of Q3 and Q4 each year;
- The atypical factors included pent-up demand for wood-based panels in the furniture segment stemming from the period of COVID-19 restrictions.

Graph 6 Behaviour of prices for wood-based panels in the Russian Federation

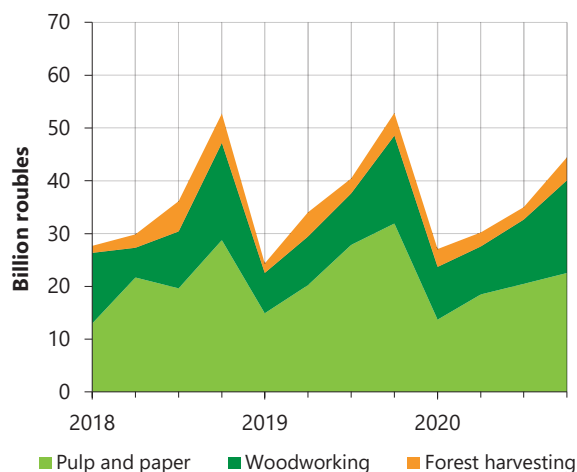


Source: WhatWood, 2021.

Another factor was the unused disposable household income that was not spent on travel or purchases (stifled by COVID-19 measures). Many households had unspent funds and used them for home improvements, repairs and purchase furniture (in the middle price segment). Significant pressure on the market was also exerted by the closure of some wood-based panel plants, limiting availability and pushing prices up.

Investments in the forest sector during 2020 declined to 136.7 billion rubles (\$1.9 billion) (graph 7) (-10% y-o-y) (Whatwood, 2021).

Graph 7 Investments by quarter in the Russian forest sector



Source: WhatWood, 2021.

2.3 External trade impact on forest products

Despite the significant strengthening of measures to prevent the spread of COVID-19, there was not a strong decline for the key items traded in the EECCA countries. Moreover, most of the items that declined, recovered in Q3–Q4 2020 (tables 3-5). This was largely a result of the rapid reopening of trade with China, the largest consumer of forest products exported from the EECCA countries.

Table 3 Export and import of the key forest products, the Russian Federation

Forest products(HS code)	Units	2017	2018	2019	2020	Change, %
Exports, Roundwood (4403)	\$1,000	1,468,522	1,461,668	1,115,340	1,022,417	-8.3
Exports, Roundwood (4403)	tonnes	15,714,619	15,608,685	13,071,679	13,219,057	1.1
Imports, Roundwood (4403)	\$1,000	324	485	260	120	-53.7
Imports, Roundwood (4403)	tonnes	1,409	3,919	1,105	679	-38.6
Exports, Sawnwood (4407)	\$1,000	3,943,584	4,504,455	4,506,757	4,218,703	-6.4
Exports, Sawnwood (4407)	tonnes	18,031,723	19,239,895	19,813,421	18,084,156	-8.7
Imports, Sawnwood (4407)	\$1,000	7,018	8,170	8,465	9,750	15.2
Imports, Sawnwood (4407)	tonnes	21,616	22,798	31,445	33,871	7.7
Exports, Particleboard and OSB	\$1,000	274,385	374,930	365,557	332,216	-9.1
Exports, Particleboard and OSB	tonnes	1,182,382	1,318,703	1,436,848	1,356,376	-5.6
Imports, Particleboard and OSB	\$1,000	145,609	153,758	102,343	122,976	20.2
Imports, Particleboard and OSB	tonnes	405,669	418,789	298,800	408,026	36.6
Exports, Fiberboard, MDF/HDF	\$1,000	280,701	341,037	339,955	319,044	-6.2
Exports, Fiberboard, MDF/HDF	tonnes	785,109	908,359	901,712	931,309	3.3
Imports, Fiberboard, MDF/HDF	\$1,000	211,069	221,002	198,552	202,286	1.9
Imports, Fiberboard, MDF/HDF	tonnes	366,921	370,301	360,243	386,995	7.4
Exports, Plywood (4412)	\$1,000	1,102,537	1,352,992	1,141,303	1,154,459	1.1
Exports, Plywood (4412)	tonnes	1,682,670	1,831,418	1,888,929	1,935,937	2.4
Imports, Plywood (4412)	\$1,000	37,752	42,947	34,170	43,866	28.3
Imports, Plywood (4412)	tonnes	41,758	39,372	32,704	43,301	32.4
Exports, pulp, and recovered	\$1,000	1,224,164	1,640,801	1,122,969	1,093,367	-2.6
Exports, pulp, and recovered	tonnes	2,605,161	2,624,350	2,435,726	2,622,847	7.7
Imports, pulp, and recovered	\$1,000	135,729	140,745	177,356	167,244	-5.7
Imports, pulp, and recovered	tonnes	205,199	178,463	246,624	313,825	27.3
Exports, Paper And Paperboard	\$1,000	2,200,794	2,742,383	2,491,262	2,410,373	-3.3
Exports, Paper And Paperboard	tonnes	3,275,368	3,461,399	3,498,190	3,990,781	14.1
Imports, Paper And Paperboard	\$1,000	2,401,417	2,657,065	2,454,115	2,305,633	-6.1
Imports, Paper And Paperboard	tonnes	1,635,225	1,705,348	1,661,000	1,524,038	-8.3

Source: TDM, 2021.

Table 4 Total exports of all products (\$ million)

Exporters	2016	2017	2018	2019	2020	Change, %
Russian Federation	285,491	357,083	449,347	422,777	335,470	-21%
Georgia	1,819	2,344	2,577	2,700	2,555	-5%
Kyrgyzstan	1,544	1,791	1,765	1,966	1,482	-25%
Kazakhstan	36,776	48,342	60,956	57,723	46,950	-19%

Source: Intracen, 2021.

Table 5 Total imports of all products (\$ million)

Importers	2016	2017	2018	2019	2020	Change, %
Russian Federation	182,262	226,966	238,151	243,781	231,552	-5%
Georgia	8,778	7,798	7,371	7,399	6,143	-17%
Kyrgyzstan	3,919	4,481	4,907	4,904	5,223	7%
Kazakhstan	25,175	29,305	32,534	38,357	38,081	-1%

Source: Intracen, 2021.

3. POLICIES TO MITIGATE COVID-19 EFFECTS ON THE FOREST INDUSTRY

Based on the preliminary results, the global economies will be recovering; presumably, for at least another year. However, it may be said that the timber industry of the EECCA countries has not been amongst the most affected sectors of the economy, as a result of the effects of COVID-19. The drop in domestic demand for wood-based panels and furniture in April–May 2020, for example, was more than offset in Q3–Q4. The plants are operating at full capacity and as of early 2021 have orders through Q2 2021. The demand for timber and forest products remains stable and demand is even growing in some segments such as tissue, sanitary and hygiene products, packaging cardboard. Remote working has accelerated the process already underway of replacing writing and newsprint paper with digital data media.

3.1 Russian Federation

The forest industry was not targeted as needing assistance by the Russian Government, as a result of being affected by the deteriorating situation due to the spread of the COVID-19 pandemic, while the furniture industry has been (WhatWood 2020a).

In 2020, the Government of the Russian Federation approved a list of 35 timber enterprises and 18 furniture companies as being eligible for state aid, including: tax and insurance contribution deferrals, state guarantees for loans as well as subsidies for production operations. The companies applying for the aid will have to undergo a stress test; its results will then be discussed at the meetings of the Russian Government Commissions for economic development and sustainability enhancement (Russian Federation Government, 2020b; and WhatWood, 2021).

In mid-May 2020, the WhatWood agency conducted a survey of the largest timber industry companies about how the COVID-19 restrictions affected their production activities and the sales situation. The survey showed that

the domestic market dipped by 50%. Furniture factories and enterprises as well as furniture retail centres were closed. The COVID-19 situation is obviously affecting demand in several key markets, but the situation is tolerable for the time being, with no significant curtailments on the horizon. The pandemic has affected global markets, but Russian companies have been able to maintain production and sales. (WhatWood, 2020b).

The furniture industry and the production of wood-based panels have been the most effected segments of the forest sector. About 41% of the Russian furniture producers had no sales revenue in April and more than 30% reported that revenues were down by over 50% (RBC, 2021). More than two-thirds of Russian furniture enterprises may go bankrupt due to the forced production downtime and lack of state support, with most stating that they have less than a six week “financial cushion”. Only one-fourth of furniture enterprises were sure that they would survive the current crisis, another 6% hoped to last six months, and 3% of the plants have already closed. Forced downtime due to non-working days the lack of state support, and non-payments could lead to the bankruptcy of two-thirds of the furniture producers in the Russian Federation over the next two months (Amedoro, 2021).

In 2020, the government adopted measures to support important enterprises by providing them targeted aid. As of December 03, 2020, the list included 1,392 companies. The selection criteria for the companies of the Russian timber industry were as follows: revenue – at least 5 billion rubles (\$69 million), number of employees – at least 500. 34 companies meet these criteria. The listed enterprises which have been affected by the COVID-19 epidemic can obtain the following support measures at the federal level:

- Soft loans for working capital financing and saving jobs. The interest rate on these loans will be subsidized and will not exceed 5%.; About 400 billion rubles (\$5.5 billion) are estimated to have be allocated for the program, with about 50% of the loans secured by government guarantees. Soft loans will be granted on a priority basis to enterprises from the most affected industries. This includes transport, heavy

engineering, metallurgy, retail sale of non-food products, etc. Enterprises can use the loans, among other things, to pay salaries, insurance premiums, rentals for premises and equipment.

- A six-month moratorium on bankruptcy has been put in place. The same conditions apply to important enterprises, as to all companies of the most affected sectors of the economy: within six months, courts will not accept petitions for bankruptcy from creditors, proceedings on initiated cases under which the bankruptcy procedure have not yet been launched will be suspended, debtors will not be charged penalties and sanctions for late payments, enforcement proceedings on property-related claims will be suspended as well.
- Deferred or instalment payments for taxes due in 2020, with some exceptions for mineral extraction tax, excise taxes, and tax on additional income from hydrocarbon production, should the income decrease by 10% or more. Should revenue fall by over 50%, companies can be provided with an instalment plan for up to 5 years.
- Important enterprises from the list which are subject to excessive risks can also apply for subsidies to cover business losses. In addition, they can request government guarantees for existing or new loans, including bond loans.
- Loans at preferential rates are also available, not only to the listed important companies/enterprises but to their subsidiary companies as well. The total amount of a loan granted to a group of companies must not exceed 3 billion rubles (\$41.6 million) nor – 5% interest rates per annum. The loan subsidies are applicable for 1 year from the date of the loan agreement.

Authorities of some regions of the Russian Federation provided forestry enterprises involved in the timber industry with an option to defer the payment for forest use. Other significant measures adopted regionally for the timber industry included supporting forest tenure holders with forest regeneration and the provision of materials for road rehabilitation. In some regions, the adopted measures included the requirement to use only locally produced wood for construction.

3.2 Belarus

When the crisis caused by COVID-19 began, Belarus was experiencing slow economic growth. The sluggish growth over recent years had been a result of an export-oriented economy vulnerable to fluctuations in energy prices, inefficient public enterprises, and a high dependence on foreign currency. In 2019, its GDP grew by only 1.2%, followed by a 0.3% contraction in Q1 of 2020. This was the result of temporary interruption in oil supplies from the Russian Federation, which in turn led to a 16% drop in Belarusian export revenues (vs. 2019), mainly from a reduction in the export of petroleum products and fertilizers. The weakening of the national currency led to financial issues for many enterprises, as about half of all outstanding loan balances are denominated in a foreign currency.

To limit the inflationary effects of currency devaluation, the government set a limit on price increases for basic goods at 0.5% in Q2 of 2020.

Policy responses and measures by the government to the economic shocks caused by the COVID-19 pandemic included the allocation of additional funds for the healthcare sector, approval of tax incentives, and tax and rental deferrals. The decision on their application is taken mainly at the local level. Monetary authorities eased some requirements for the banking sector, including those for asset classification and foreign currency loans.

Over 200 million Belarusian rubles (\$82.3 million) were invested in the forest sector in the first 8 months of 2020, which is a 72% increase from the same period of 2019. All scheduled forest management activities were performed in full. In 2020, forest regeneration and cultivation were carried out on over 40,000 ha. The forest industry harvested over 14 million m³ of marketable timber, which was 12% more than targeted. Proceeds from forestry and hunting amounted to 315 million rubles (\$129.6 million) compared to the target of 264 million rubles (\$108.6 million), an 8% increase over the same period of the last year. The industry also fulfilled its obligations to build at least 100 km of forest roads per year.

3.3 Ukraine

The Government of Ukraine adopted a range of financial and economic aid measures to support the citizens and businesses which were impacted by COVID-19 in 2020.

The Cabinet of Ministers of Ukraine gradually introduced initiatives aimed at supporting small and medium enterprises (SMEs) in April and May of 2020 and modified existing support programs. Here are the key initiatives applicable to the forest sector:

- Exemption from payment of penalties and fines for violation of tax legislation during the quarantine.
- Exemption from payments (of taxes and rental) for state and communal land (this is available for some forestry enterprises, especially state-owned working on state-owned land).
- Exemption from the accrual of single social security contributions to entrepreneurs during the quarantine (a significant share of micro and small enterprises in the forest sector operate as sole proprietors).
- Underemployment aid: reimbursement of parts of the salary to employees who had to scale back temporarily to part-time work during the quarantine.
- Refinancing existing loans of up to 3 million hryvnias (\$111 thousand) for up to 5 years, at 0% interest rates), loans for working capital financing were allowed (up to 3 million hryvnias (\$111 thousand, for up to 2 years, at 3% interest rates).

3.4 Kazakhstan

Many businesses in Kazakhstan were negatively impacted by the lockdowns and related measures taken against the COVID-19 virus:

- About 300,000 business entities suspended their activities;
- Roughly, 1 million business entities, mainly in the tertiary and trade sectors, were directly affected by the pandemic;
- Over 1.6 million people were placed on unpaid leave;

- About 14,000–15,000 business entities with loans granted by second-tier banks applied for a deferral;
- 4.5 million people received social insurance benefits of about 42,500 tenge each (\$103) during 2020.

To support the affected businesses, the Government of Kazakhstan adopted a package of anti-crisis measures including:

- Lending/financing:
 - low or no interest loans of 600 billion tenge (\$1.45 billion) for SMEs for working capital;
 - loans for priority projects;
 - subsidized interest rates and government guarantees;
 - suspension of payments on loan principal and interests.
- Industry-specific funding and grants:
 - manufacturing industry support;
 - Nurly Zher Housing Program, Nurly Zhol Transport Program for 2020–2025;
 - state program for agricultural industrial development;
 - purchase guarantees through forward contracts (offtake agreements);
 - subsidizing coupon rates of interest on carrier bonds.
- Various tax payment deadlines were deferred, tax audits were suspended and there was a reduction on the VAT for food (from 12% to 8%). The following taxes were temporarily suspended:
 - customs duties on the export of petroleum products;
 - excise taxes on the export of fuels and lubricants;
 - property tax;
 - land tax;
 - income tax.
- Other miscellaneous aid and stimulants were provided as well, such as:
 - state program for the development of productive employment and mass entrepreneurship;
 - employment roadmap;

- sale of fuels and lubricants at reduced prices;
- unemployment compensation;
- deferral of rental payments.

The Nurly Zher Program (aimed at improving the affordability and comfort of housing and increasing housing infrastructure) was expanded by 219 billion tenge (\$530 million) to 5,056 billion tenge (\$12.2 billion). The construction industry is one of the key consumers of timber industry products and by supporting the construction industry, the Government of Kazakhstan is stimulating the consumption of timber products.

3.5 Armenia

The impact of COVID-19 on Armenia put significant pressure on the population and economy. Healthcare service and public institutions were under pressure to mobilize resources to cope with the pandemic, while the slowdown in economic activity negatively impacted public finances. Economic activity in Armenia has weakened significantly since March 2020 when the country's borders were closed and a national lockdown was imposed.

In addition, the country is being negatively affected by the decline in global and household demand, as well as tourism. Remittances (financial transfers from Armenia's diaspora abroad), which account for a high share of the country's household revenues will likely decline. The Government of Armenia initially put in place 19 key measures aimed at stabilizing the social and economic impacts from COVID-19. Three additional measures were later added. All of these measures were intended to mitigate the economic and social consequences of the pandemic. The value of state aid is estimated at 150 billion drams (\$307 million) (about 2.3% of GDP). During the first two months of the anti-crisis program, 84.4 billion drams (\$173 million) were allocated. The main recipients of this support were SMEs (owner-proprietor, agriculture, high-tech, etc.) that were the most affected by the 6-week lockdown. Some of the measures were aimed at preserving jobs and providing financial support for employees who could not work.

The measures adopted to mitigate the consequences of the pandemic were fully

applicable to the timber industry of Armenia. To receive state aid, companies must meet the certain criteria for the targeted small and medium-sized enterprises (The Government of the Republic of Armenia, 2021).

3.6 Uzbekistan

Uzbekistan put in place large-scale measures to stimulate economic growth and investment activity, as well as to ramp up production. However, agriculture, forestry, and the fishing industry were some of the least affected sectors in the country: they managed to continue their activities and maintain or even increase production and payrolls. It should be noted that these sectors consist mainly of small businesses (2021). The demand for agricultural products generally remained unchanged. The main problem faced by entrepreneurs were related to distribution bottlenecks, i.e. delivery of goods to markets.

According to research by the Center for Economic Research and Reforms together with the UN Development Program in Uzbekistan (UNDP, 2020) the greatest impact on the operations of enterprises in the first months of the lockdown was exerted by:

- decreased demand for goods and services of enterprises;
- reduced sales channels/market access;
- closure of enterprises, as a result of the aforementioned.

Closures of enterprises, declining demand, difficulties in the delivery of goods to markets, and the fact that some companies had to lower prices for their goods and services resulted in a decline in revenues.

The decline in demand for goods varied by sector. Hotels and restaurants suffered the most. Demand in agriculture, forestry, and the fishing industry remained unchanged.

Preliminary figures indicate that businesses in Uzbekistan produced goods worth 322.3 trillion soums (\$32 billion) in January–November 2020, virtually identical (100.1%) to the same period of 2019. The largest share in output was from manufacturing (83.1%). The key declines came from a decrease in mining and quarrying (22.5% drop), as well as in the water, sewer, waste collection and disposal (6.2% drop). At the same

time, the output in manufacturing grew by 6.3%; and power, gas, steam supply, and air conditioning grew by 12.9%.

The total output (January–September 2020) in agriculture, forestry, and the fishing industry amounted to 180.1 trillion so‘ms (\$17.9 billion), which is a 3.4% increase compared to the corresponding period of 2019. Of this total, crop and livestock, hunting, and related services in these fields amounted to 174.8 trillion so‘ms (\$17.4 billion), forestry – 4.5 trillion so‘ms (\$447 million), in the fishing industry – 0.8 trillion so‘ms (\$79.5 million). Forestry accounts for 2.5% of the total output in this segment and outputs were up in all reported categories vs. the same period the previous year.

A resolution of the Cabinet of Ministers of the Republic of Uzbekistan, No. 526 “on Measures to restore economic growth in 2020–2021 and continue systemic structural reforms in the sectors of the economy” of 29 August, 2020, provides for the adoption of the Roadmap. This action plan for 2020–2021 aims at implementing the stipulated measures to restore and continue structural reforms in the economy (Ministry of Investment and Foreign Trade of the Republic of Uzbekistan, 2021).

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SOME FACTS ABOUT THE EUROPEAN FORESTRY COMMISSION

The European Forestry Commission (EFC), which was created in 1947, is one of six Regional Forestry Commissions established by the Food and Agriculture Organization of the United Nations (FAO) to provide a policy and technical forum for countries to discuss and address forest issues on a regional basis.

The purpose of EFC is to advise on the formulation of forest policy and to review and coordinate its implementation at the regional level; to exchange information; to advise on suitable practices and actions to address technical and economic problems (generally through special Subsidiary Bodies); and to make appropriate recommendations in relation to the foregoing. The EFC meets every two years and its official languages are English, French and Spanish.

The EFC has a number of associated subsidiary bodies, including the Working Party on the Management of Mountain Watersheds and the Working Party on Mediterranean forestry issues (*Silva Mediterranea*). It shares with the United Nations Economic Commission for Europe (UNECE) the ECE/FAO Working Party on Forest Statistics, Economics and Management.

FAO encourages the wide participation of government officials from forestry and other sectors as well as representatives of international, regional and subregional organizations that deal with forest-related issues in the region, including non-governmental organizations and the private sector. Accordingly, the EFC is open to all Members and Associate Members whose territories are situated wholly or in part in the European Region or who are responsible for the international relations of any non-self-governing territory in that region. Membership comprises such eligible Member Nations as have notified the Director-General of their desire to be considered as Members.

The EFC is one of the technical commissions serving the FAO Regional Office for Europe and Central Asia (REU), and the EFC Secretary is based in Geneva. EFC work is regulated by its Rules of Procedures, which were adopted by the FAO Conference in 1961 and amended at the Eighteenth Session of the EFC in 1977.

SOME FACTS ABOUT THE COMMITTEE ON FORESTS AND THE FOREST INDUSTRY

The UNECE Committee on Forests and the Forest Industry (COFFI) is a principal subsidiary body of the United Nations Economic Commission for Europe (UNECE) based in Geneva. It constitutes a forum for cooperation and consultation between member countries on forestry, the forest industry and forest product matters. All countries of Europe, Eastern Europe, Caucasus and Central Asia, the United States of America, Canada and Israel are members of the UNECE and participate in its work.

The UNECE Committee on Forests and the Forest Industry shall, within the context of sustainable development, provide member countries with the information and services needed for policymaking and decision-making with regard to their forest and forest industry sectors, including the trade and use of forest products and, where appropriate, it will formulate recommendations addressed to member governments and interested organizations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those developments offering possibilities for facilitating international trade and for enhancing the protection of the environment;
2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;
3. Provide a framework for cooperation, for example by organizing seminars, workshops and ad hoc meetings and setting up time-limited ad hoc groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries required for the development and implementation of policies leading to the sustainable development of the sector and the protection of the environment in their respective countries;

4. Carry out tasks identified by the UNECE or the Committee on Forests and the Forest Industry as being of priority, including the facilitation of subregional cooperation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic perspective; and
5. Keep under review its structure and priorities and cooperate with other international and intergovernmental organizations active in the sector, and in particular with FAO (the Food and Agriculture Organization of the United Nations) and its European Forestry Commission, and with the International Labour Organization, in order to ensure complementarity and to avoid duplication, thereby optimizing the use of resources.

More information about the work of the EFC and COFFI may be obtained by contacting:

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COVID-19 impacts on the forest sector in Eastern Europe, Caucasus and Central Asia

This report summarizes the impacts that the COVID-19 pandemic had during 2020 in the forest sector of the countries in Eastern Europe, the Caucasus and Central Asia (EECCA) (Armenia, Azerbaijan, Belarus, Georgia, Kazakhstan, Kyrgyzstan, Moldova, Russian Federation, Tajikistan, Turkmenistan, Ukraine and Uzbekistan), focusing on production, export, import, consumption, prices and employment of the main wood products: roundwood, sawnwood, wood-based panels, wooden furniture, paper and paperboards. It also covers the recovery measures implemented by EECCA governments. Data from various sources, such as official statistics, international data bases, as well as interviews with forest products companies were used for their views on the impact of COVID-19.

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