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# **TIMBER PRODUCTS MARKET IN EUROPEAN COUNTRIES – CHARACTERISTICS AND TRENDS**



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IN WOOD PROCESSING AND FURNITURE MANUFACTURING**

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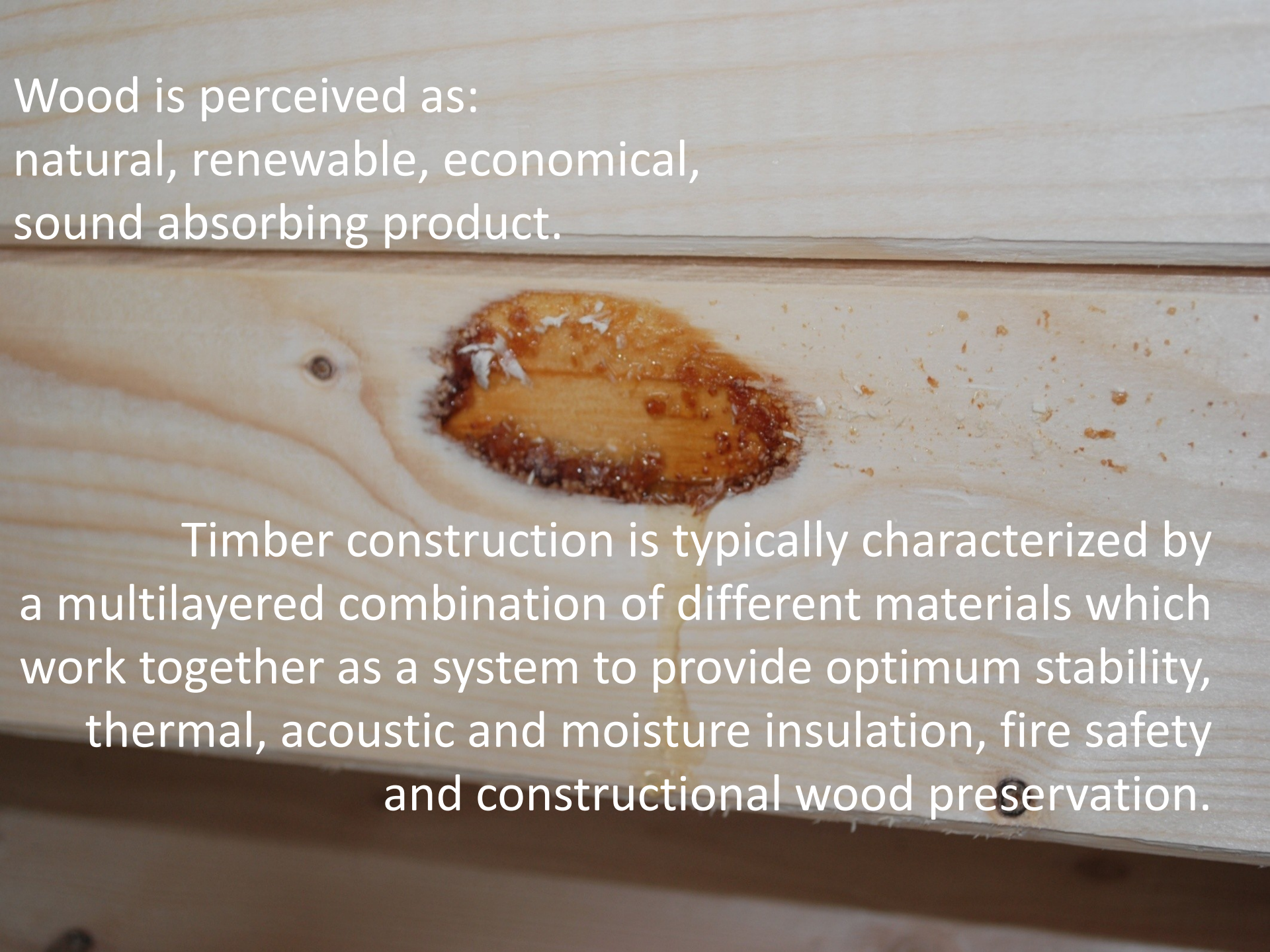
The main issues affecting the timber market comprise technical innovations, changes in design and consumer requirements and environmental issues. These, combined with the availability of timber and overall economic activity, drive the performance and prices in the timber market.

# The content of presentation:

- 1. Introduction.**
- 2. Characteristics of European timber markets strategies.**
- 3. “Verified legal” and “verified legal and sustainable” solid wood products.**
- 4. Analysis of trends on European timber markets.**
  - 4.1. Opportunities and threats.**
- 5. Conclusion.**



Wood is perceived as:  
natural, renewable, economical,  
sound absorbing product.



Timber construction is typically characterized by a multilayered combination of different materials which work together as a system to provide optimum stability, thermal, acoustic and moisture insulation, fire safety and constructional wood preservation.





Timber building is perceived as a efficiency part of **future energy-efficient building (passive building)** because the wood is: sustainable, CO<sup>2</sup> neutral and a highly effective insulator, creating excellent living conditions.

One of the most specific advantage of wood is its ability of energy using reduction.

*From materials of Instytut Budownictwa Pasywnego  
(Polish Institute of Passive Building) . . .*





The timber construction has a higher heat insulation value than conventional construction methods, even with lower wall thicknesses.

An external wall constructed using timber may have only half the thickness of a brick or concrete wall, yet provide double the thermal insulation value, while at the same time avoiding the thermal bridging common with other construction methods.



Raw materials and by-products consist of round wood, sawn wood, veneer and densified wood. Value-added products consist of wood-based panels, builder's joinery and carpentry of wood (mouldings, door frames, windows and window frames, stairs and staircases and a considerable amount of the parquetry, which are imported in unfinished or semi-finished stages).



**CHARACTERISTICS  
OF  
EUROPEAN TIMBER MARKETS STRATEGIES**

# The Austrian timber industry in its marketing point on advantages such as:

- wood does not produce any waste and it is totally recyclable,
- wood has just one tenth of the weight of steel,
- extraordinary structural-physical characteristics,
- wood is CO<sub>2</sub>-neutral,
- wood is light,
- wood is the material with the best rate of insulation and heat storage and saves heating costs for every housing space,
- wood burns, but the breakdown of wood in case of a fire is exactly accountable – an advantage that not all materials have,
- the insulation effect of an (a) 10 cm thin massive wood wall complies with a 160 cm thick concrete wall,
- Austrian companies and institutions are worldwide leaders in the development of wood composites as well as in modern wood manufacturing and processing technology,
- surfaces of wood strongly contribute to a comfortable room climate, since wood regulates air humidity efficiently,
- building with wood is simple but demanding at the same time – architects, designer and construction workers feel gratification, because they can treat a renewable, philanthropic resource,
- living with wood – ageless beauty.



**Irish Timber Frame Manufacturers Association** in promoting timber frames were following:

- Timber is environmentally friendly and will help Ireland to fulfil its Kyoto commitments,
- Timber frame is warmer than masonry and delivers „huge“ financial savings on energy,
- **Timber frames are faster to construct and saves money for the builder (Masonry is a „dinosaur“ technology etcetera),**
- Technically – they say that both timber frame and masonry comply with the building regulations and therefore that timber frame is „equivalent“ to masonry.

**The Swedish timber industry** in its marketing of multi-storey buildings with timber frames is following:

- **timber frame is an eco-friendly alternative**, emitting less carbon dioxide,
- buildings constructed on a timber frame are lightweight and well suited to poorer ground conditions,
- It is cheaper to build using a timber frame than it is with concrete or steel,
- **timber is a natural, Swedish material**,
- research and the development of joists now permit timber-framed houses to have acoustic insulation to equal that of a house built of concrete. Measures have also been taken to deal with the risk of damp and mould,
- it is quicker to build with timber since no lengthy drying periods are required, such as those linked to concrete,
- developments in the use of timber frames for constructing multi-storey buildings leads to regional growth and increased employment.



**Belgium woodworking industry** took off to promote the timber industry and to inform the advantages of using timber frames:

- energy economics,
- positive influence on health,
- fire resistance,
- an eco-friendly alternative,
- emitting less carbon dioxide, producing oxygen.

Promotion campaigns in Belgium was presented on the example of the Belgian Woodforum - a building of 1700 m<sup>2</sup> in the heart of Brussels (L' Arsenal 2, Avenue des Volontaires, 1040 Bruxelles) named "The Home of Wood".

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Nielegalny wyrąb lasów, pozyskiwanie drewna niewiadomego pochodzenia lub z nielegalnych źródeł to największe **problemy rynku sprzedaży drewna**. Nieuczciwy obrót drewnem niszczy gospodarkę leśną, zaburza funkcjonowanie ekosystemów, powoduje niekontrolowane wylesianie i starty finansowe poszczególnych państw. Teraz Unia Europejska podjęła kroki, by te nielegalne procedury ukrócić.

Nieuczciwości przeciwdziałać mają nowe przepisy zdefiniowane w rozporządzeniu dotyczącym sprzedaży drewna w całej UE. Co prawda zaczną obowiązywać dopiero 3 marca 2013 roku, już teraz jednak poszczególne kraje członkowskie mogą się do tych zmian przygotować.

Na mocy nowych przepisów administracja państwowa zobowiązana będzie do regularnego kontrolowania **handlu drewnem**. W jej obowiązkach leżało będzie też egzekwowanie nowych przepisów. Ich głównym celem jest bardziej dokładny monitoring drewna przeznaczonego na sprzedaż. Handel nielegalnie pozyskanymi surowcami będzie w całej Wspólnocie zabroniony.

Firmy, które prowadzą sprzedaż drewna będą musiały bardziej szczegółowo filtrować swoich współpracowników. Do rejestru będą musiały wprowadzać informacje dotyczące zarówno dostawców drewna, jak i nabywców drewna, a także gotowych produktów drewnianych. Będą musiały także sprawdzać źródło, z którego dostarczane jest im drewno.

Nowe zasady mają pomóc krajom członkowskim w prowadzeniu zrównoważonej gospodarki leśnej a także minimalizować straty powodowane przez nielegalną wycinkę lasów.



The term “**verified timber**” is used when referring to products supplied through any of the programs such as: Forest Stewardship Council (FSC), Programme for Endorsement of Forest Certification (PEFC). Forest certification programs combined several elements typically taken to involve:

- establishment of forestry and chain of custody standards through a balanced consensus-building multi-stakeholder process;
- alignment of forestry standards with international principles of sustainable forestry management;
- independent third party assessment of on-ground forestry performance and chain of custody management systems against these standards;
- conformance of accreditation and certification bodies with, at minimum, appropriate ISO standards.

The term “**certified timber**” is used when referring to products which are verified under the terms of one or other of the international, national or regional forest certification frameworks identified in.

The term “**verified legal timber**” is used when referring either to products verified under the terms of one or other of the private sector legality verification or phased certification programs or to products covered by a FLEGT VPA license.

**Table 1. The EU-27's 10 leading wood product manufacturers**

**Source: Eurostat**

	<b>Softwood sawn</b>	<b>Hardwood sawn</b>	<b>Plywood</b>	<b>Veneer</b>	<b>MDF</b>	<b>Particle board</b>
Germany	24028	1142	229	392	4380	10928
Sweden	18490	110	92	55	85	627
France	8300	1890	378	80	1180	4841
Austria	11027	235	258	23	650	2670
Finland	12400	77	1410	59	0	400
Poland	2844	461	440	89	1726	5330
Spain	2180	1152	450	60	1160	3295
Italy	900	800	420	470	1155	3600
Czech R.	5187	267	175	19	94	1428
UK	3100	45	0	0	865	2684
<b>EU-27</b>	<b>102330</b>	<b>11734</b>	<b>4497</b>	<b>1546</b>	<b>13098</b>	<b>44690</b>

The are some implications for the timber trade result from analysis presented above:

- **Certification and verification reduces importers' risk,**
- **More marketing efforts downstream needed,**
- **Due diligence – a way to reduce risk,**
- **Trade associations have a key role.**



## **Trends and developments affecting EU consumption and EU production are following:**

- The short-term prospects for the EU timber market, mostly concerning the professional market (i.e. professionals/ service providers working in the timber industry), are rather negative. Hardwood consumption has been especially hit by the current economic downturn, thus increasing competition among exporters to, and traders in, the EU.
- Global competition in the timber trade increased in the past few years. Demand is growing, driven by the growth in wood-processing industries in some Asian countries (particularly China) and Eastern Europe, as well as the increased importance of wood as a sustainable energy source. European government officials and key experts foresee a shortage of sustainably managed timber in the near future.
- Relocation of existing wood production capacities to developing countries.
- Annual growth in production in Eastern Europe is expected to be about twice the level of growth in Western Europe across all product categories. Nevertheless, Western Europe is expected to remain the largest producer of timber.

## SOURCES:

### CBI MARKET SURVEY:

#### THE TIMBER AND TIMBER PRODUCTS MARKET IN THE EU

Source: CBI Market Information Database • URL: [www.cbi.eu](http://www.cbi.eu) • Contact: [marketinfo@cbi.eu](mailto:marketinfo@cbi.eu) • [www.cbi.eu/disclaimer](http://www.cbi.eu/disclaimer)

### ENGINEEREDWOOD PRODUCTS IN IRELAND

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EU market conditions for “verified legal” and “verified legal and sustainable” wood products





A woman with reddish-brown hair, wearing a denim jacket and jeans, stands in the foreground. She is holding a yellow folder or book and has a black bag slung over her shoulder. Behind her is a large, two-story wooden house that is tilted at a significant angle, appearing to be built on a slope or a special foundation. The house has several windows and a stone-like roofline. In the background, there are other buildings, including one with a sign that says 'CONTINENTAL Apartamenty' and 'MARGO'. A group of people is gathered near the buildings, and the scene is set in a wooded area with tall trees.

**Thank you for your attention**

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