



2016

Denis Jelačić

The Wood Products Sector in South East Europe: An Emerging Region



SLOVENIA: 20.200 km², 61.6 % under forests, 2 mil citizens, GDP 24.300 \$ per capita

CROATIA: 56.500 km², 43 % under forests, 4.5 mil citizens, GDP 14.400 \$ per capita

BOSNIA & HERCEGOVINA: 51.000 km², 43 % under forests, 4.6 mil citizens, GDP 4.300 \$ per capita

SERBIA: 77.500 km², 31% under forests, 7.1 mil citizens, GDP 5.900 \$ per capita

MONTENEGRO: 13.800 km², 61% under forests, 0.7 mil citizens, GDP 6.700 \$ per capita

KOSOVO: 11.000 km², ???, 2.1 mil citizens, GDP 2.300 \$ per capita

ALBANIA: 28.800 km², 28.2 % under forests, 3.5 mil citizens, GDP 3.700 \$ per capita

MACEDONIA: 25.700 km², 39.5 % under forests, 2.2 mil citizens, GDP 4.500 \$ per capita

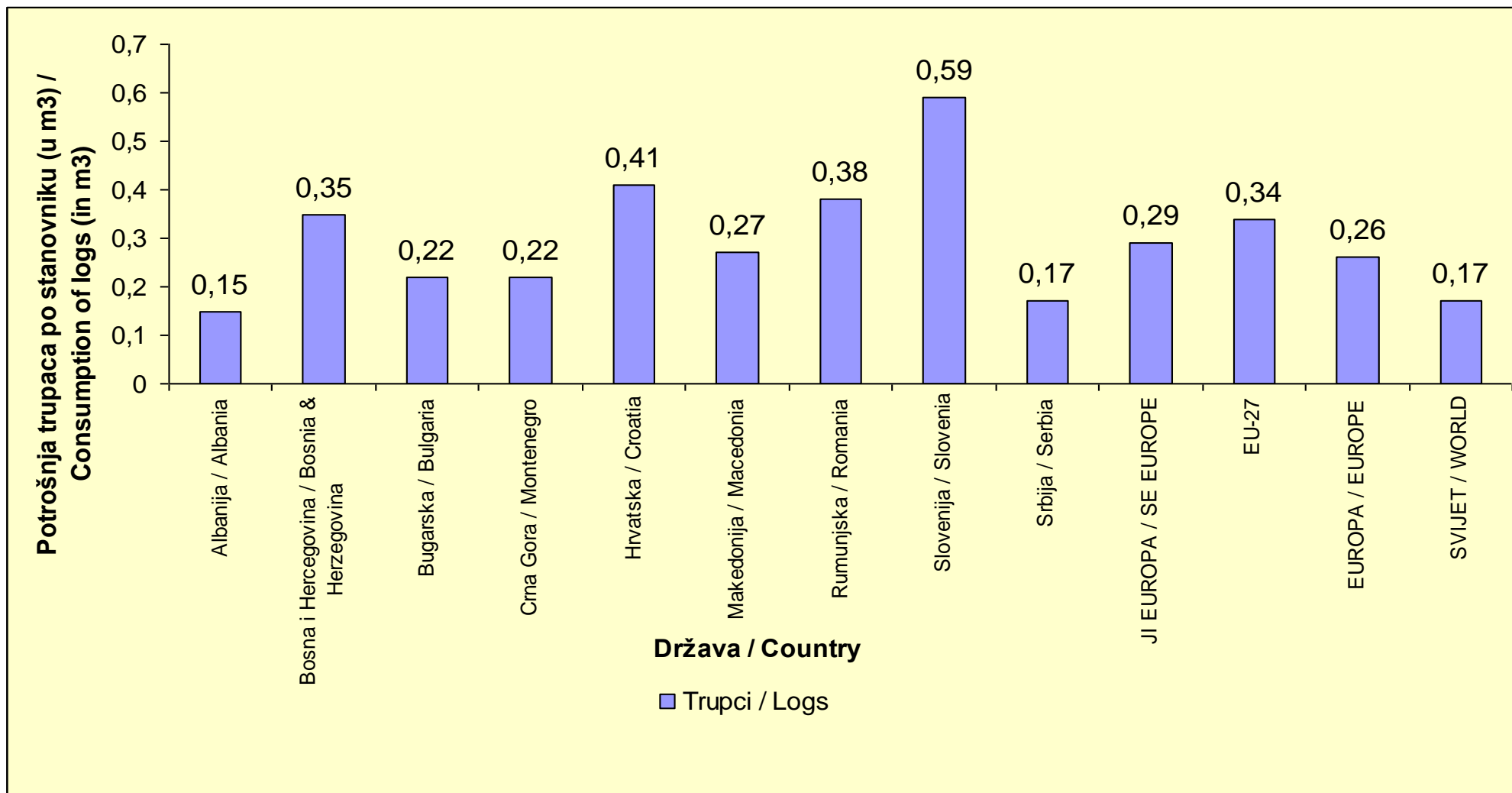
BULGARIA: 111.000 km², 46.5 % under forests, 7.6 mil citizens, GDP 6.700 \$ per capita

ROMANIA: 238.400 km², 33.1 % under forests, 22.2 mil citizens, GDP 7.900 \$ per capita

Total: 633.700 km², 56.5 mil citizens (Louisiana: 123.600 km², 4.6 mil citizens, 33.250 \$ per capita)

(Texas: 696.200 km², 25 mil citizens, 45.400 \$ per capita)

DRŽAVA/ COUNTRY	DRVNA ZALIHA (u 000 000 m ³ / GROWING STOCK (in 000 000 m ³)	PROIZVODNJA PILANSKIH I FURNIRSKIH TRUPACA (u 000 m ³ / SAWLOGS AND VENEER LOGS PRODUCTION (in 000 m ³)	UDIO (%) / SHARE (%)
Albania / Albania	79	15	0,02
Bosna i Hercegovina/ Bosnia and Herzegovina	391	1597	0,41
Bugarska / Bulgaria	568	1579	0,28
Crna Gora / Montenegro	72	192	0,27
Hrvatska / Croatia	352	2212	0,63
Makedonija/ Macedonia	63	84	0,13
Rumunjska / Romania	1347	8026	0,60
Slovenija / Slovenia	357	1514	0,42
Srbija / Serbia	362	1175	0,32



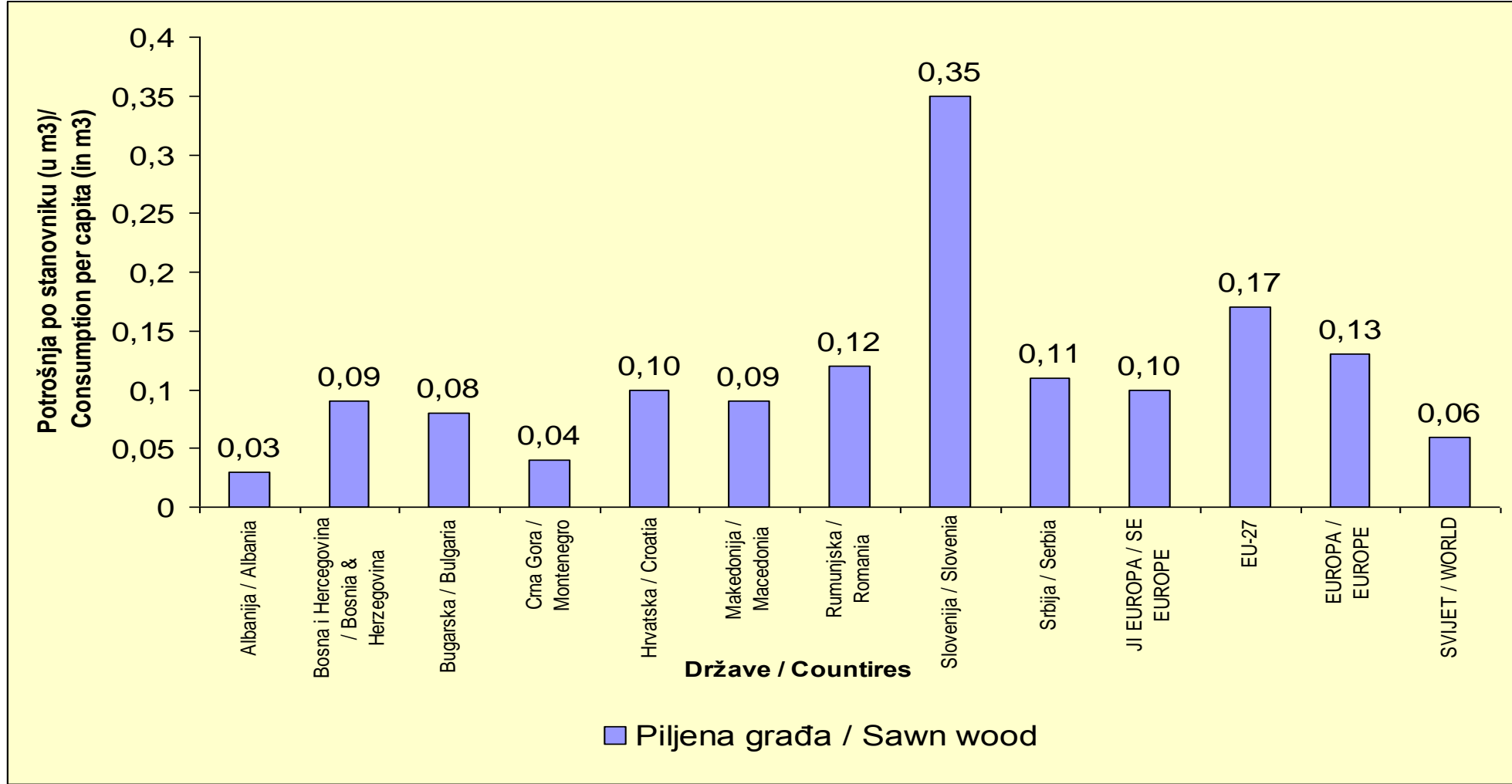
	2000	2005	2010	2011	2012	2013	2014
EU-28	411 764	447 502	427 611	433 657	433 173	434 326	425 351
EA (*)	236 540	232 925	234 993	237 590	237 347	237 044	225 127
Belgium	4 510	4 950	4 827	5 128	6 663	:	:
Bulgaria	4 784	5 862	5 668	6 205	5 973	5 804	5 570
Czech Republic	14 441	15 510	16 736	15 381	15 061	15 331	15 476
Denmark	2 952	2 962	2 669	2 583	2 669	3 180	3 180
Germany	53 710	56 946	54 418	56 142	52 338	53 207	54 356
Estonia	8 910	5 500	7 200	7 110	7 290	7 655	8 460
Ireland	2 673	2 648	2 618	2 635	2 580	2 760	2 831
Greece	2 245	1 523	1 048	1 196	:	:	:
Spain	14 321	15 531	16 089	15 428	14 657	15 758	15 911
France	65 865	52 499	55 808	55 041	51 495	51 671	51 671
Croatia	3 669	4 018	4 477	5 258	5 714	5 436	5 003
Italy	9 329	8 691	7 844	7 744	7 744	:	:
Cyprus	21	10	9	8	11	9	9
Latvia	14 304	12 843	12 534	12 833	12 530	12 242	12 597
Lithuania	5 500	6 045	7 097	7 004	6 921	7 053	7 351
Luxembourg	260	249	275	261	:	:	:
Hungary	5 902	5 940	5 740	6 232	5 946	6 027	5 671
Malta	0	0	0	0	0	0	0
Netherlands	1 039	1 110	1 081	982	8 063	1 108	1 337
Austria	13 276	16 471	17 831	18 696	18 021	17 390	17 089
Poland	26 025	31 945	35 467	37 180	38 015	38 939	40 565
Portugal	10 831	10 746	9 648	10 961	10 711	10 642	:
Romania	13 148	14 501	13 112	14 359	16 088	15 195	15 068
Slovenia	2 253	2 733	2 945	3 388	3 341	3 415	5 099
Slovakia	6 163	9 302	9 599	9 213	8 063	9 168	:
Finland	54 542	52 250	50 952	50 767	52 310	56 992	57 033
Sweden	63 300	98 200	72 200	71 900	69 499	69 600	70 100
United Kingdom	7 791	8 519	9 718	10 020	10 120	10 821	11 184
Iceland	0	0	:	3	4	:	:
Liechtenstein	:	:	25	26	23	19	19
Norway	8 156	9 667	10 443	10 291	10 572	11 598	12 386
Switzerland	9 238	5 285	4 938	4 861	4 466	4 577	4 709
Montenegro	:	:	364	364	915	915	915
FYR of Macedonia	:	822	631	631	779	691	691
Turkey	15 939	16 185	20 554	21 039	21 959	20 858	22 835
Brazil	:	255 743	271 501	284 019	284 985	264 443	264 443
Canada	201 845	203 121	142 013	148 178	152 594	152 076	154 259
China	:	302 037	291 251	288 466	285 135	347 512	347 512
India	:	328 677	332 499	331 969	331 436	357 226	357 226
Indonesia	:	123 791	113 849	117 994	115 623	115 232	115 232
Russia	158 100	185 000	175 000	220 224	216 379	194 461	203 000
United States	466 549	467 347	323 986	338 090	376 629	396 818	398 693

(*) EA-11 for 2000. EA-12 for 2005. EA-16 for 2010. EA-17 for 2011–13. EA-18 for 2014.

The data that were not available were nevertheless estimated by Eurostat and are included in the EU-aggregates.

Source: Eurostat (online data codes: for_remov)

DRŽAVA/ COUNTRY	DRVNA ZALIHA (u 000 000 m ³ / GROWING STOCK (in 000 000 m ³)	PROIZVODNJA PILJENE GRAĐE (u 000 m ³ / SAWN WOOD PRODUCTION (in 000 m ³)	UDIO (%) / SHARE (%)
Albania / Albania	79	8	0,01
Bosna i Hercegovina/ Bosnia and Herzegovina	391	998	0,26
Bugarska / Bulgaria	568	451	0,14
Crna Gora / Montenegro	72	77	0,11
Hrvatska / Croatia	352	653	0,19
Makedonija/ Macedonia	63	2	0,0032
Rumunjska / Romania	1347	4800	0,36
Slovenija / Slovenia	357	776	0,22
Srbija / Serbia	362	574	0,16



	2000	2005	2010	2011	2012	2013	2014
EU-28	100 706	108 706	100 815	101 994	100 058	99 736	99 208
EA (*)	61 337	66 777	59 673	60 627	57 947	58 002	55 133
Belgium	1 150	1 285	1 383	1 388	1 342	:	:
Bulgaria	312	569	554	728	698	801	:
Czech Republic	4 106	4 003	4 744	4 454	4 259	4 037	3 861
Denmark	364	196	448	372	392.7	357.6	358
Germany	16 340	21 931	22 059	22 628	21 081	21 478	21 787
Estonia	1 436	2 063	1 771	1 503	1 491	1 558	1 600
Ireland	888	1 015	772	761	782	825	907
Greece	123	191	118	106	:	:	:
Spain	3 760	3 660	2 038	2 162	1 971	2 047	2 047
France	10 536	9 715	8 316	8 675	8 067	7 901	7 901
Croatia	642	624	677	754	851	877	780
Italy	1 630	1 590	1 200	1 250	1 370	1 360	1 430
Cyprus	9	4	4	3	3	2	2
Latvia	3 900	4 227	3 150	3 432	3 316	3 367	3 657
Lithuania	1 300	1 445	1 272	1 260	1 150	1 120	1 345
Luxembourg	133	133	94	78	:	:	:
Hungary	291	215	133	:	302	109	121
Malta	0	0	0	0	0	0	0
Netherlands	389	279	231	238	1 430	216	227
Austria	10 390	11 074	9 603	9 636	8 952	8 534	8 351
Poland	4 262	3 360	4 220	4 422	4 249	4 321	4 615
Portugal	1 427	1 010	1 045	1 044	1 097	872	:
Romania	3 396	4 321	4 323	4 442	5 500	5 532	5 762
Slovenia	439	527	760	703	660	660	700
Slovakia	1 265	2 621	2 576	2 204	1 430	1 750	:
Finland	13 420	12 269	9 473	9 750	9 440	10 440	10 940
Sweden	16 176	17 600	16 750	16 500	16 492	16 074	17 500
United Kingdom	2 622	2 780	3 101	3 279	3 409	3 581	3 764
Iceland	0	0	:	:	0	:	:
Liechtenstein	:	:	4	8	0	0	0
Norway	2 280	2 326	2 118	2 271	2 289	2 206	2 407
Switzerland	1 625	1 591	1 457	1 313	1 135	1 044	1 140
Montenegro	:	:	50	50	53	53	53
FYR of Macedonia	:	18	5	5	8	4	4
Turkey	5 528	6 445	6 243	6 461	6 682	6 405	6 635
Brazil	:	23 557	25 080	25 210	25 210	15 397	15 397
Canada	50 465	60 187	38 667	38 880	40 715	42 813	43 351
China	:	18 348	37 231	44 638	55 738	63 040	68 440
India	:	14 789	6 889	6 889	6 889	6 889	6 889
Indonesia	:	4 330	4 169	4 169	4 169	4 169	4 169
Russia	20 000	22 033	28 870	31 215	32 230	33 500	33 900
United States	91 076	97 020	57 629	60 185	64 246	71 115	74 803

(*) EA-11 for 2000. EA-12 for 2005. EA-16 for 2010. EA-17 for 2011–13. EA-18 for 2014.

Source: Eurostat (online data code: for_swpan)

The data not available were nevertheless estimated by Eurostat and are included in the EU-aggregates.

SLOVENIA: production - logs 4 times more coniferous, sawn wood 7 times more softwood

CROATIA: production - logs 3.5 times more non-coniferous, sawn wood 5.5 times more hardwood

BOSNIA & HERCEGOVINA: production - logs 2 times more coniferous, sawn wood 2 times more softwood

SERBIA: production - logs 4 times more non-coniferous, sawn wood 3 times more hardwood

MONTENEGRO: production - logs and sawn wood equally hard and soft wood

KOSOVO:

ALBANIA: production - logs 2 times more non-coniferous, sawn wood equally soft and hard wood

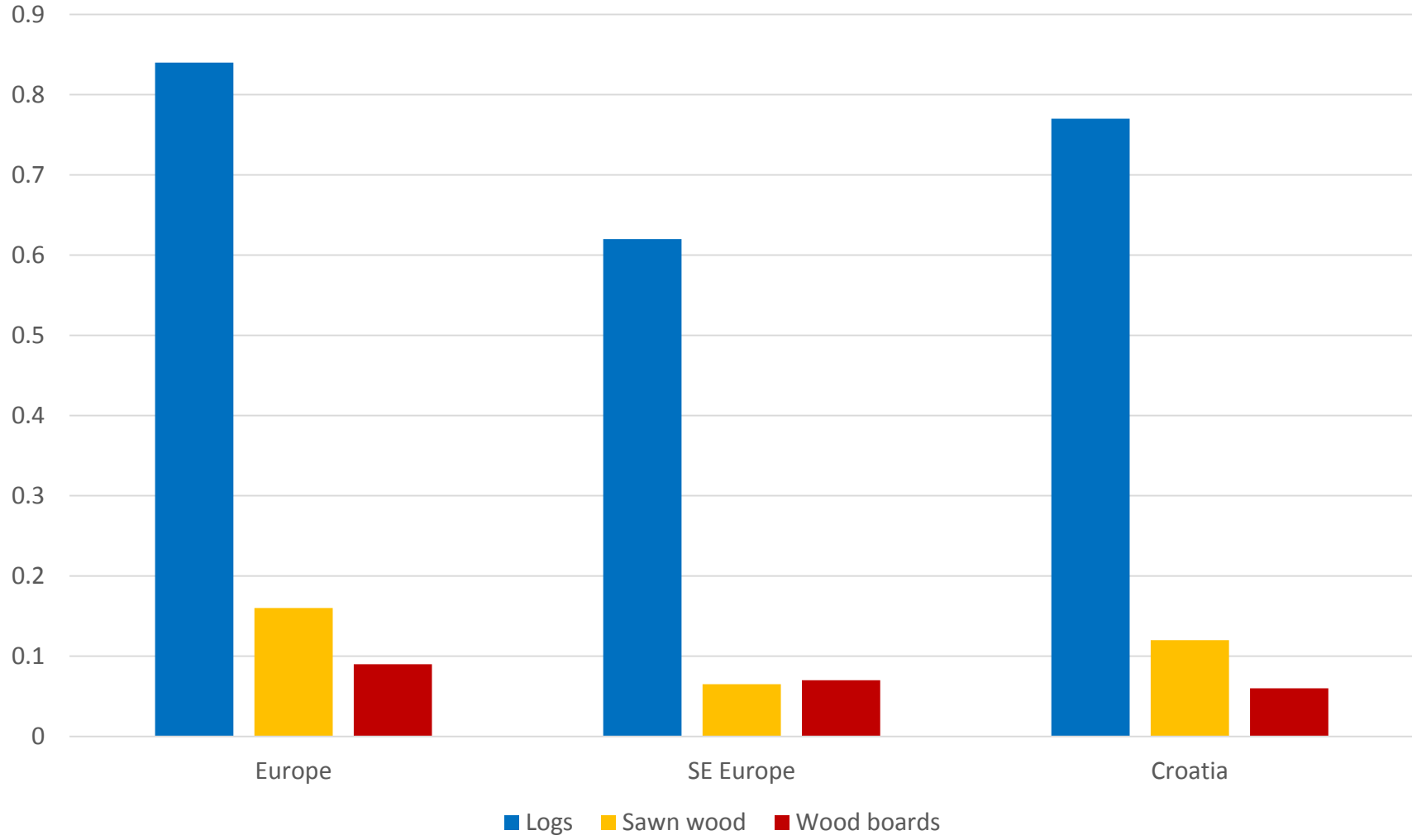
MACEDONIA: production - logs 2 times more non-coniferous, sawn wood 2 times more hardwood

BULGARIA: production - logs 2.2 times more coniferous, sawn wood 1.3 times more softwood

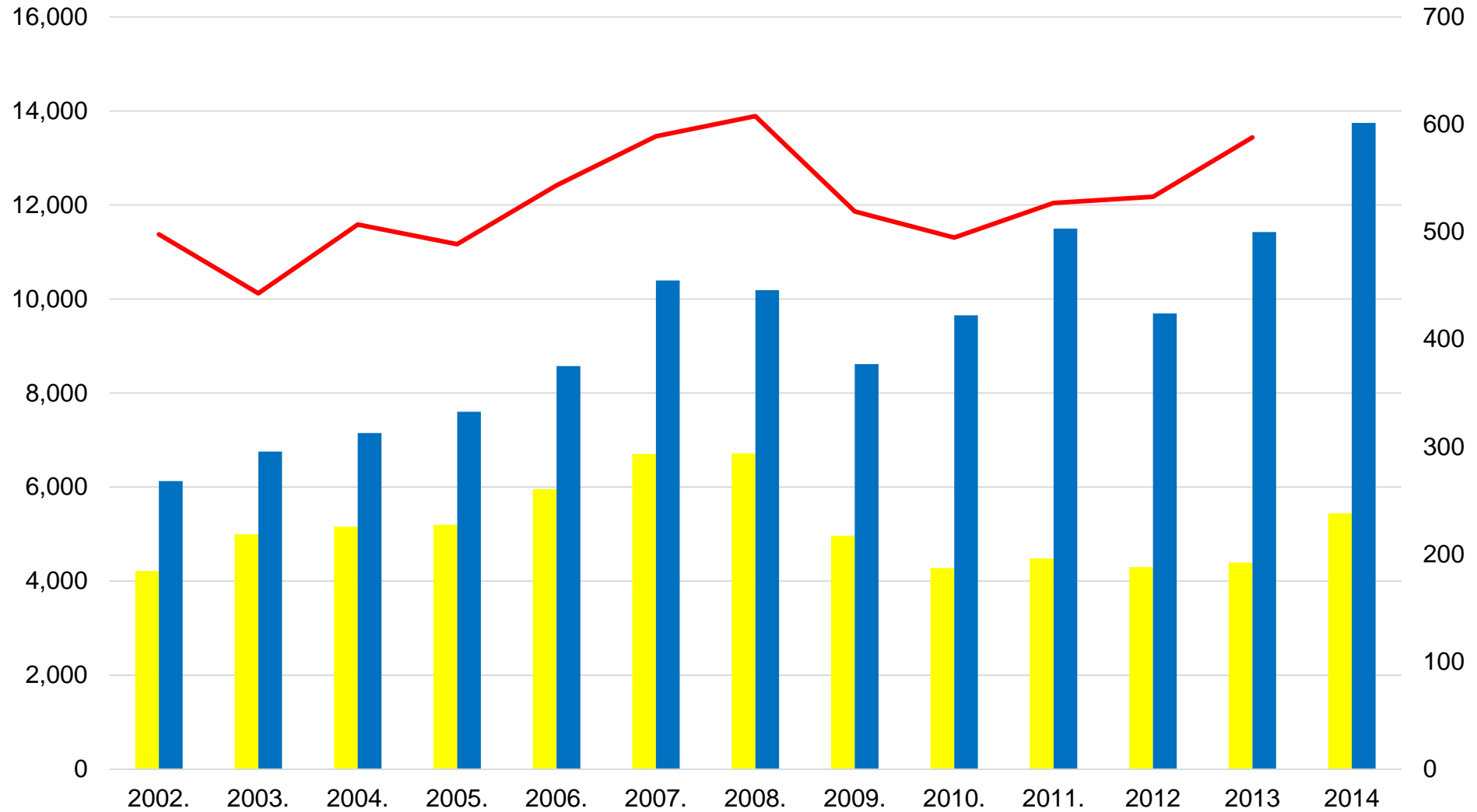
ROMANIA: production - logs and sawn wood equally hard and soft wood

Production of wood boards (all kinds) in Bulgaria, Romania and Slovenia is equal or similar to production of sawn wood, everywhere else is much, much lower.

Consumption (in m³ per person)



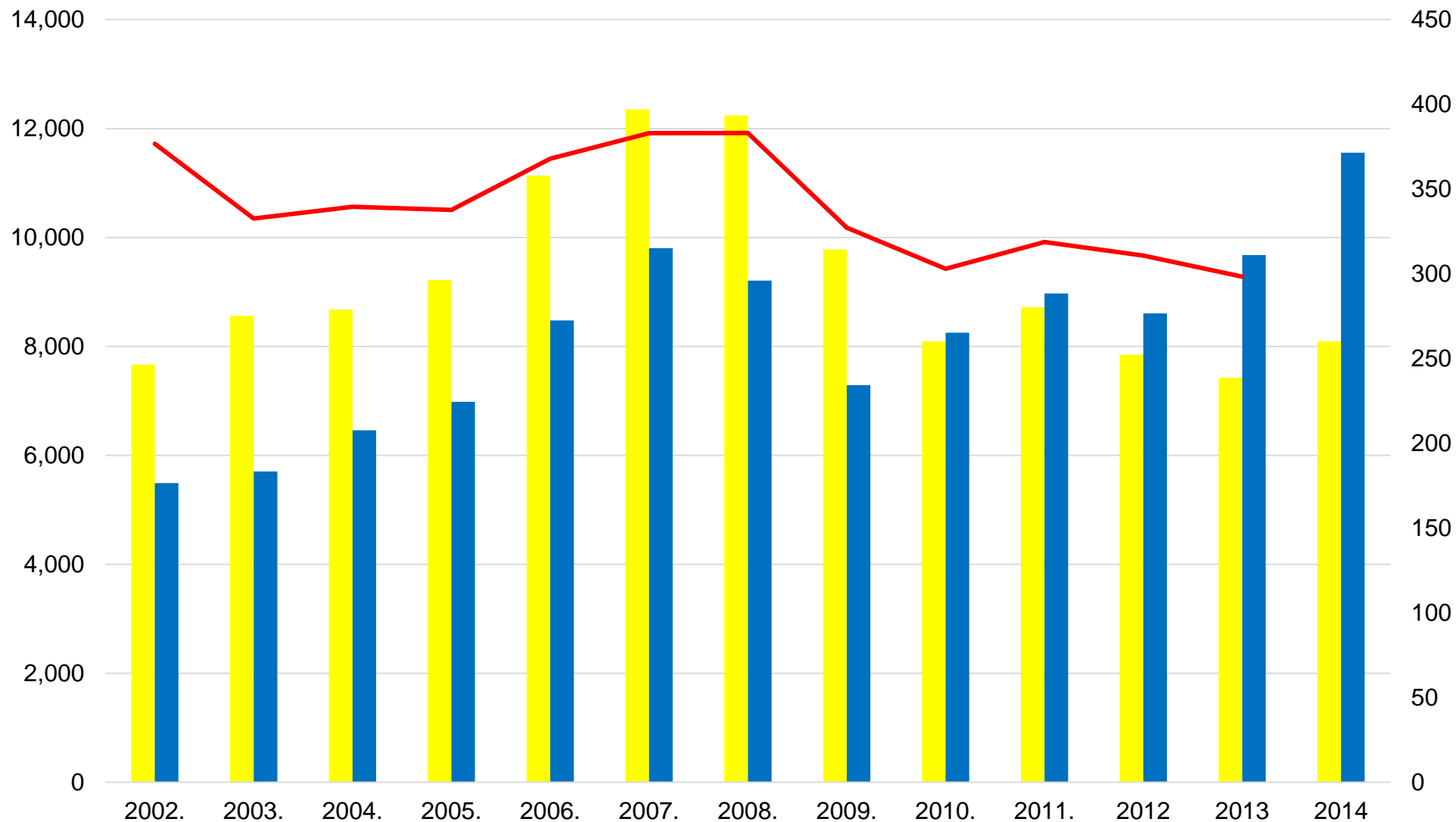
CROATIA C16 - Wood products without furniture
(employment, import - mil USD, export - mil USD)

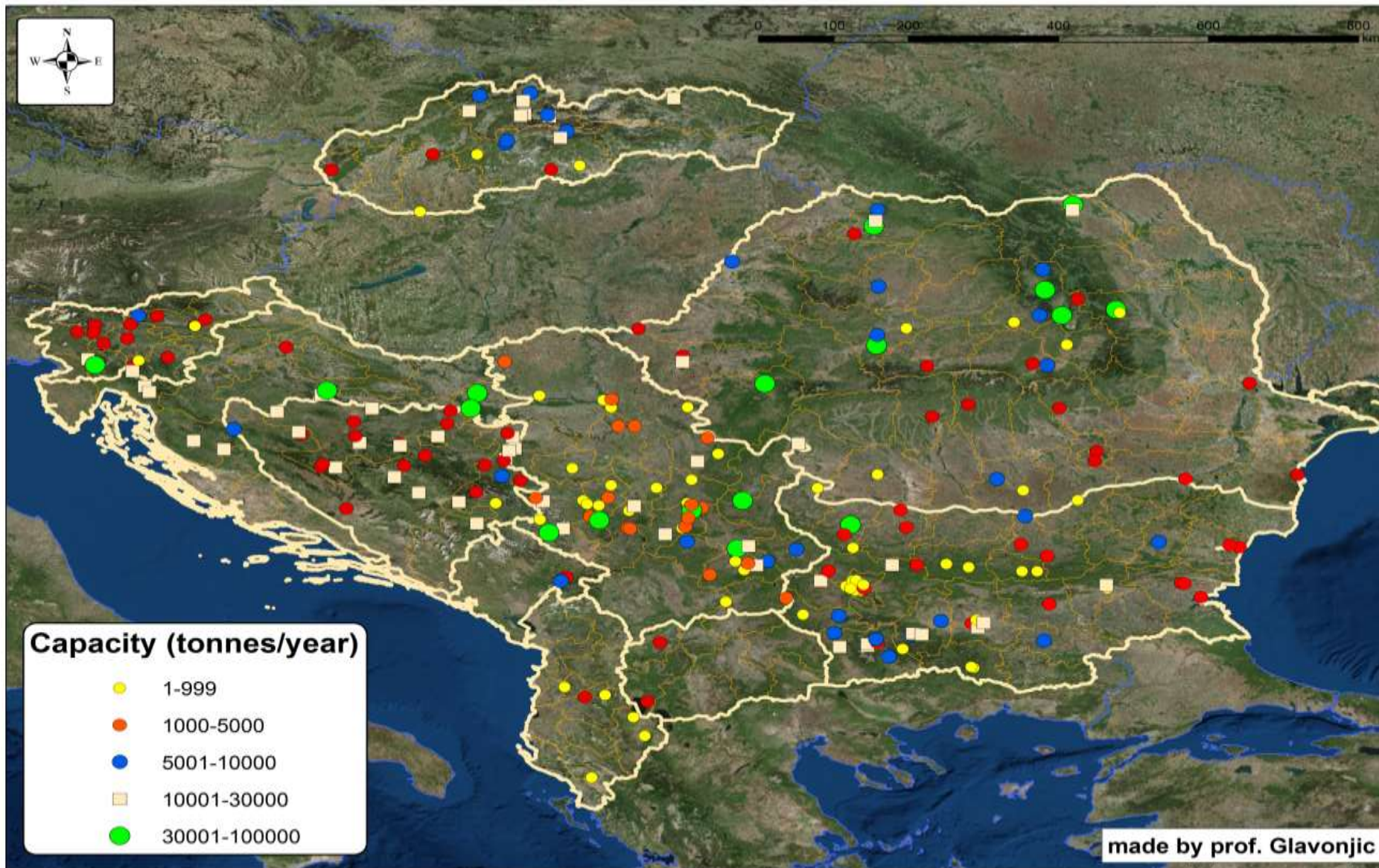


	Total consumption €million	Share of national production out of total consumption	Share of imports out of total consumption	Imports from intra-EU countries' share of consumption	Imports from extra-EU countries' share of consumption
Germany	18,794	49%	51%	36%	15%
France	12,079	52%	48%	35%	13%
United Kingdom	11,144	54%	46%	21%	25%
Italy	9,414	83%	17%	11%	6%
Spain	5,074	65%	35%	24%	11%
Netherlands	3,030	29%	71%	40%	31%
Belgium-Lux	3,007	23%	77%	60%	18%
Austria	2,856	29%	71%	61%	10%
Poland	2,749	66%	34%	25%	9%
Sweden	2,715	46%	54%	37%	18%
Denmark	1,587	32%	68%	43%	25%
Czech Republic	1,382	59%	41%	35%	6%
Finland	1,291	64%	36%	31%	5%
Portugal	803	38%	62%	58%	4%
Greece	715	69%	31%	19%	12%
Slovakia	646	60%	40%	38%	2%
Ireland	560	54%	46%	32%	14%
Romania	550	42%	58%	43%	14%
Hungary	432	24%	76%	63%	14%
Croatia	350	38%	62%	39%	23%
Slovenia	284	n.a.	n.a.	n.a.	n.a.
Lithuania	175	37%	63%	51%	13%
Estonia	165	57%	43%	35%	8%
Cyprus	156	47%	53%	35%	18%
Bulgaria	154	25%	75%	54%	21%
Latvia	148	20%	80%	64%	16%
Malta	78	50%	50%	36%	14%
EU 15	73,069	53%	47%	32%	15%
EU13	7,268	55%	45%	35%	10%
EU28	80,337	53%	47%	32%	15%

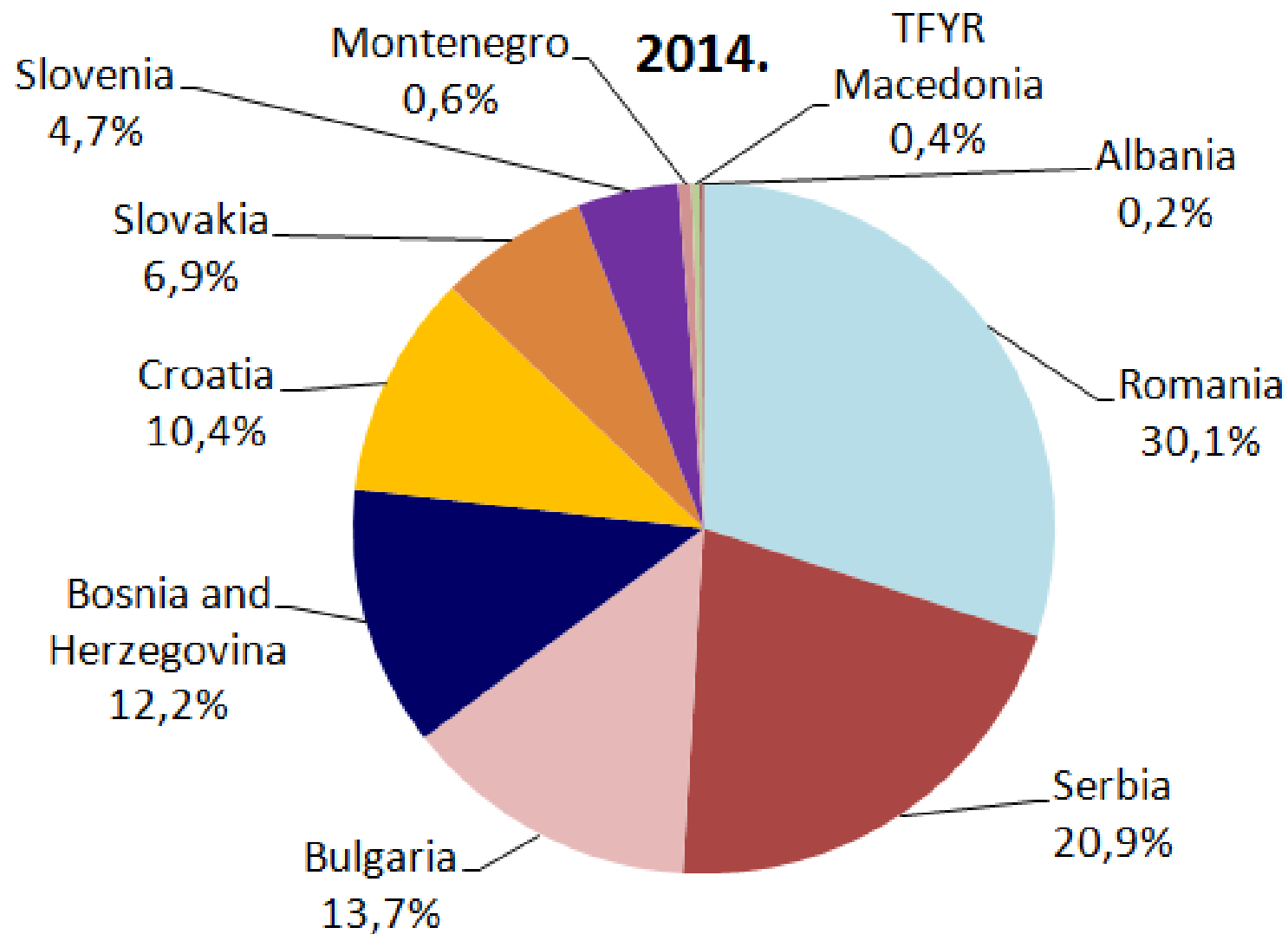
	Emillion	Share of EU total	Average yearly growth rate 2003-2012
Germany	17,738	21%	1.5%
Italy	15,950	19%	-2.1%
Poland	8,323	10%	7.4%
France	7,929	9%	0.2%
United Kingdom	7,022	8%	-2.5%
Spain	4,611	5%	-4.8%
Sweden	3,021	4%	2.4%
Denmark	2,147	3%	-2.2%
Netherlands	2,119	3%	-0.7%
Austria	2,115	3%	-0.4%
Belgium-Lux	1,953	2%	-0.6%
Romania	1,594	2%	6.3%
Czech Republic	1,459	2%	1.5%
Portugal	1,354	2%	-0.4%
Lithuania	1,090	1%	11.2%
Hungary	1,017	1%	1.8%
Finland	929	1%	-2.6%
Slovakia	928	1%	6.6%
Slovenia	619	1%	-3.4%
Greece	532	1%	-7.9%
Ireland	376	0%	-3.5%
Estonia	373	0%	2.0%
Croatia	369	0%	1.8%
Bulgaria	268	0%	2.6%
Latvia	188	0%	-0.3%
Cyprus	82	0%	-4.1%
Malta	41	0%	-3.4%
EU15	67,796	81%	-1.0%
EU13	16,351	19%	5.1%
EU28	84,147	100%	-0.1%

CROATIA C31 - Furniture (employment, import - mil USD, export - mil USD)

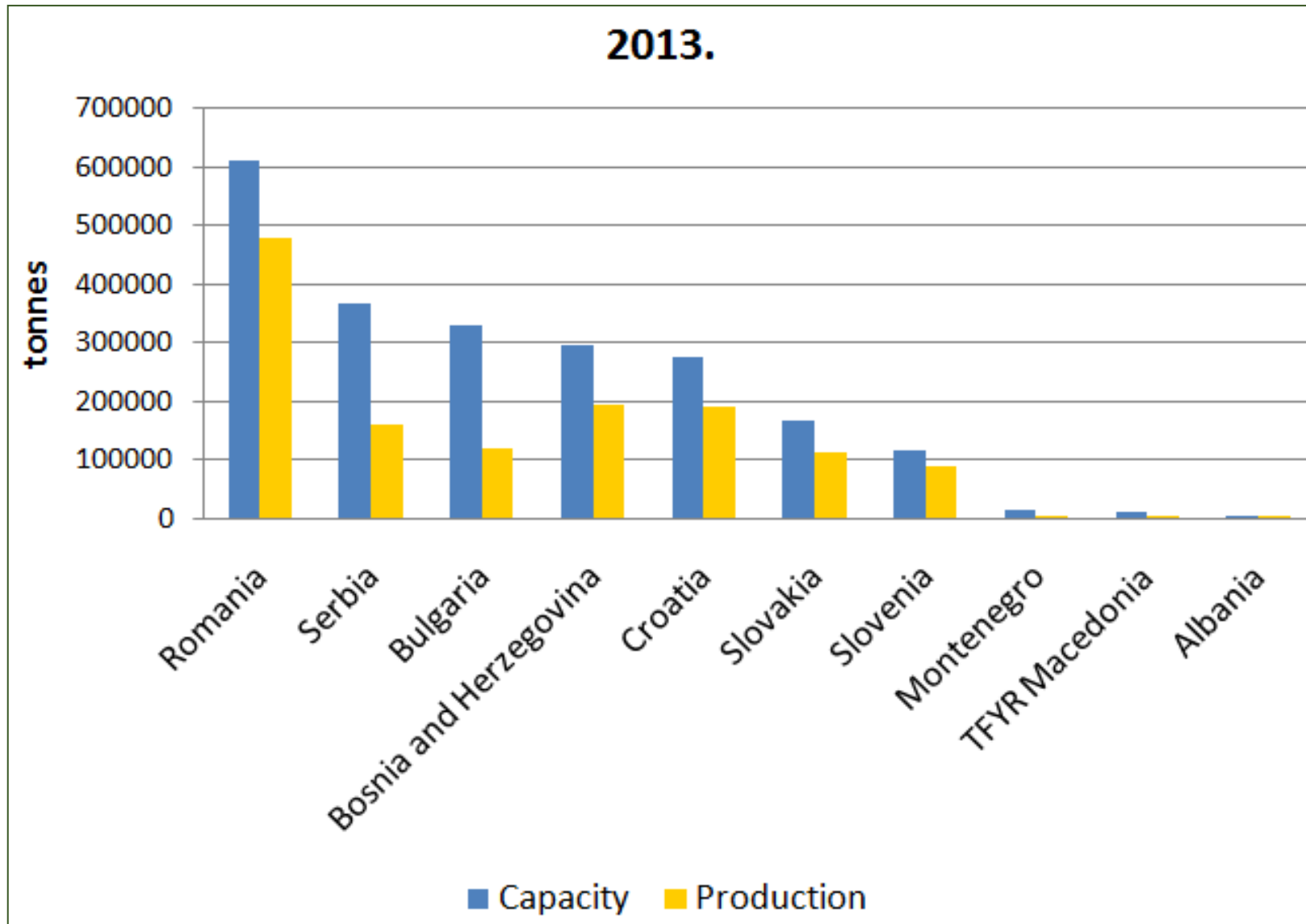




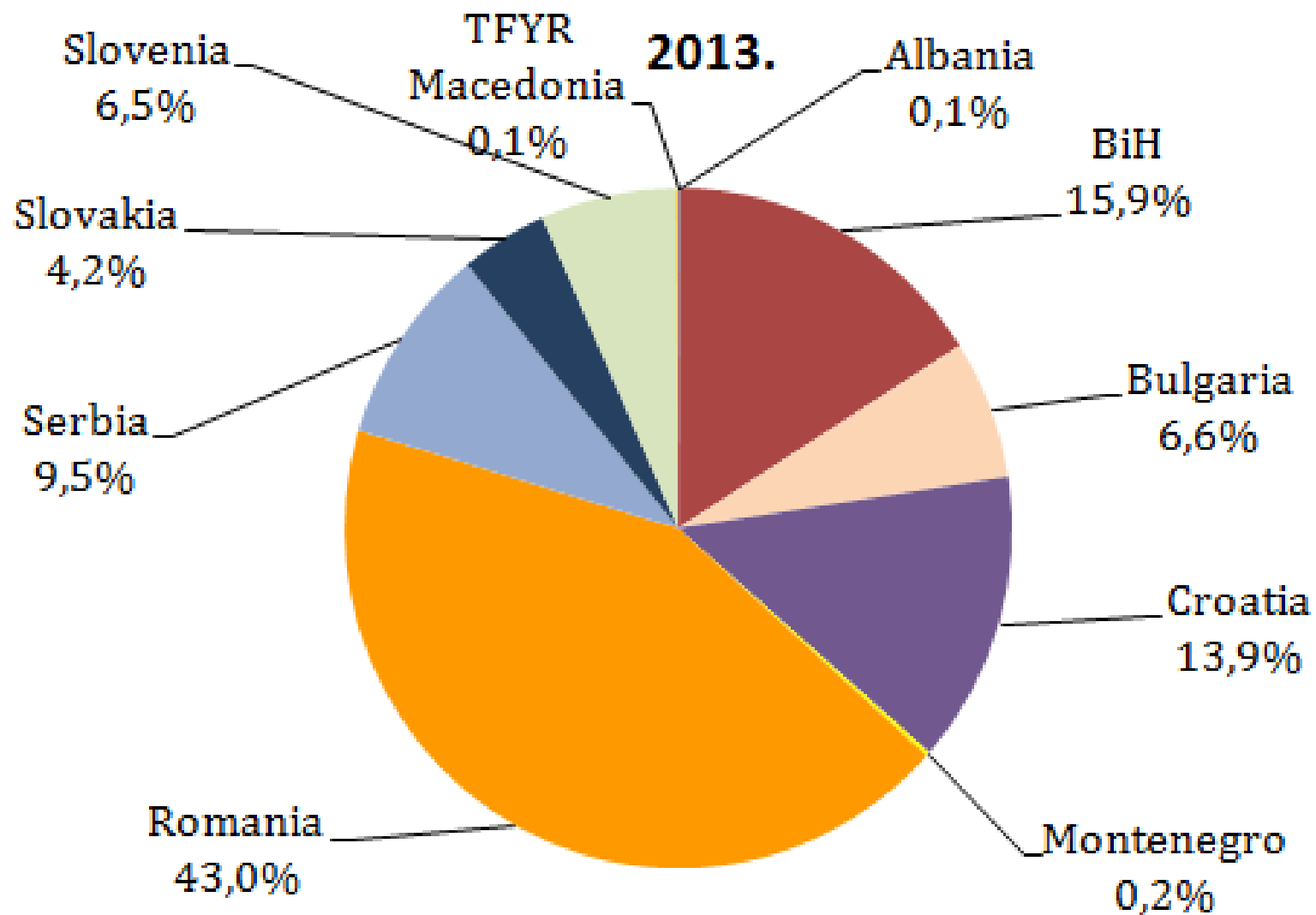
Map of wood pellet producers in South East Europe



Share of total installed capacities for the production of wood pellets per countries in the Region



Relations between production of wood pellets and installed capacities in the selected countries of the Region



Export of wood pellets from South East Europe by country of origin



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Thank you for your attention !