

**DIGITALISATION AND CIRCULAR ECONOMY:  
forestry and forestry based industry implications**

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▶ **GLOBAL TRENDS  
AFFECTING THE EU  
TIMBER TRADE**



Authors

Michal Dzian

Hubert Paluš

Ján Parobek

# Introduction

- **Timber trade VS. GLOBALIZATION**
- **The EU share of the global timber market is almost 50%**
- **Impact on timber trade have the markets of Asia and South America**
- **China's entry to the WTO**

# Objectives

**Analyse the global trends affecting the timber market of EU.**

- **Objects of our study:** industrial roundwood, sawnwood, woodbased panels, pulp, paper and paper boards
- **We analysed four main factors:** production, consumption, export and import
- We analysed the development of these factors at **last 5 years.**



# **The EU market and trade with industrial roundwood**



## EU's market of Industrial roundwood

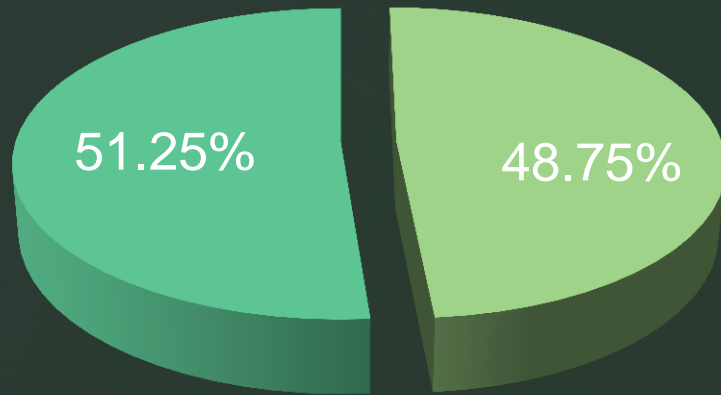
- The harvest of industrial roundwood has been **increasing during the last 5 years.**
- The countries with most extensive harvest were Finland, Sweden and Poland.
- The production of industrial roundwood in the EU **increased by 10% at the last 5 years.**
- The consumption of industrial roundwood **increased by 8%.**

## EU's trade of industrial roundwood

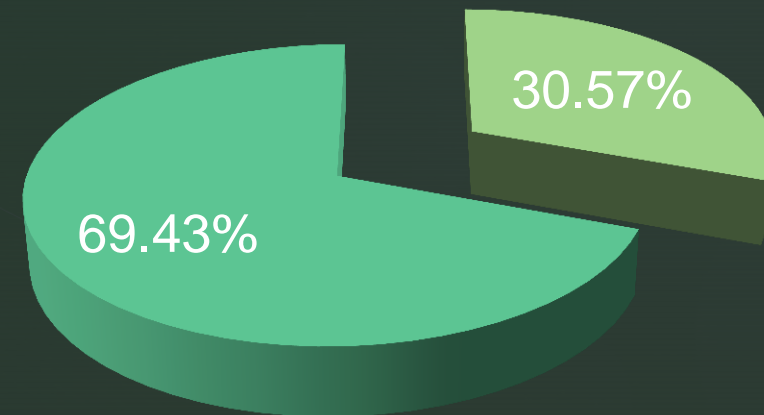
- The level of export was stable at last 5 years, import decreased.
- Export in the Czech republic increased by **43%** from the years **2015 to 2017**
- Main **export flows** from the Czech Republic– Austria, Germany, Slovakia, China and India.

# EU's trade of industrial roundwood

The share of EU's import on industrial roundwood



The share of EU's export on industrial roundwood





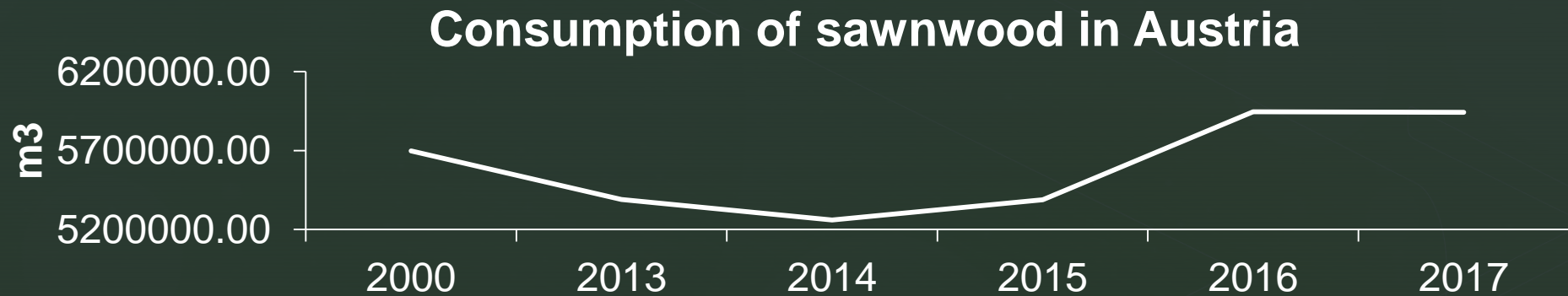
# The EU market and trade of wood products





# EU's sawnwood trade and market

- Production of sawnwood **increased by 10%** at the last 5 years
- Consumption of sawnwood increased **by 14%**
- The changes of consumption were most strongly in Austria and England

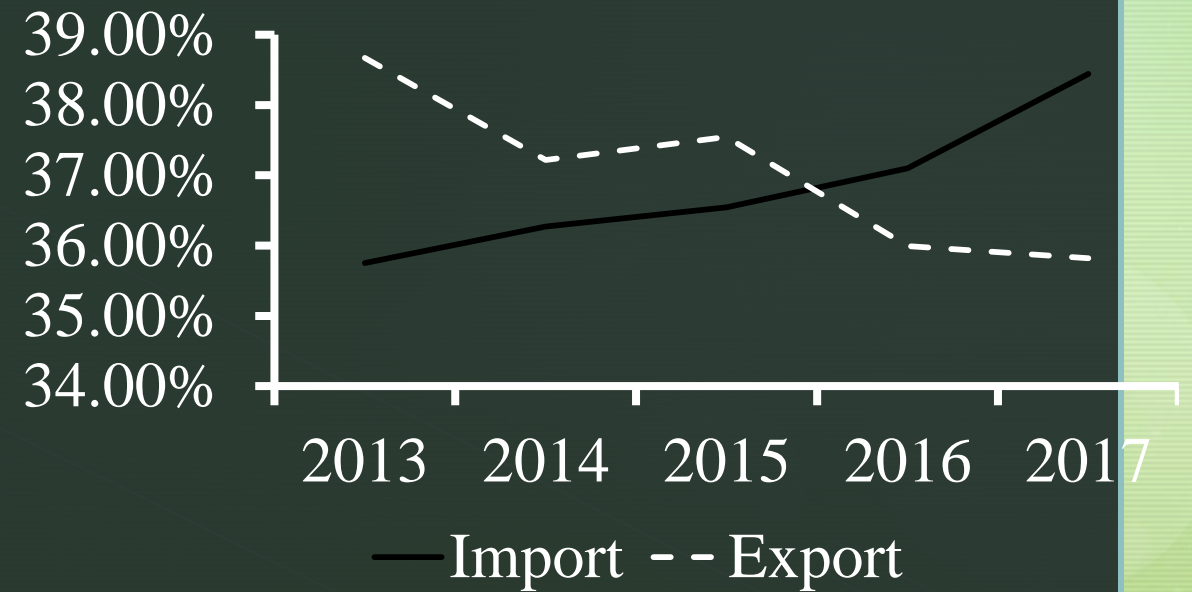


## EU's sawnwood trade and market

	Coniferous sawnwood	Non-coniferous sawnwood
Production	+ 10,5 %	+ 6 %
Consumption	+ 14 %	+ 2,5 %
Export	+ 13,4 %	+ 30 %
Import	+ 23 %	+ 14 %

## EU's wood based panels market and trade

	Wood based panels
Production	+ 11 %
Consumption	+ 18 %
Export	- 3 %
Import	+ 3 %



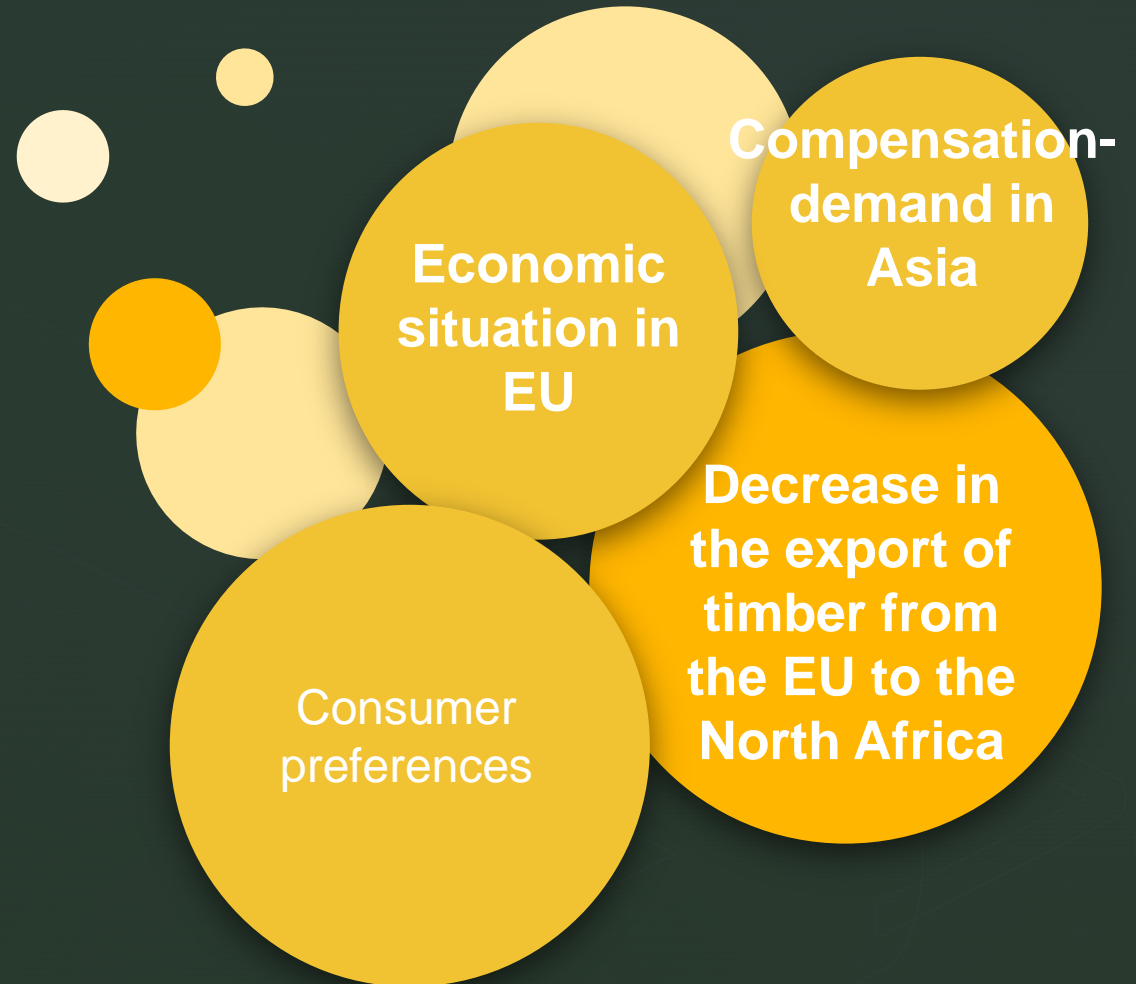
## EU's pulp and paper market and trade

	Paper and paper board	Pulp
Production	+ 1 %	+ 2,5 %
Consumption	+ 1 %	+ 1 %
Export	+ 5,5 %	+ 4,5 %
Import	+ 5 %	+ 1 %

# Factors affecting the **global** timber trade



Factors affecting the **global** timber trade



Factors affecting the **global** timber trade

Pulp market is stable

Decrease of demand for paper in China

Increase of digital communication



Thank you for your attention!

