UNECE Timber Committee
Market Discussions

Theme:
“China’s influence on forest products markets in the UNECE region”

3-4 October 2006, Geneva
Today’s topics

• Policy implications of forest products market developments
• China’s forest products markets
• Sustainable forest products industry, carbon and climate change
Tomorrow’s topics

- Certified forest products markets
- Economic background
- Wood raw materials
- Wood energy
- Sawn softwood
- Sawn hardwood
- Tropical timber
- Panels
- Paper & pulp
- Value-added
Info sources

- Country forecasts for 2006 & 2007
- Country market statements
- Expert presentations
- Delegates’ interventions in discussions
UNECE/FAO Forest Products

- Produced summer 2006
- On website in August
- Printed in September
- Russian in 5 months
- French in 7 months
- Executive summaries available in English and Russia
Thanks to the Geneva Review Team!

- Pauliina Leikoski & Matti Toivio – Assistants
- Douglas Clark & Florian Steierer – Technical reviews
- Alex McCusker – Statistics
- Maria Levina – Layout
- Sefora Kifle – Prices
- Cynthia de Castro – Administration
And thanks to all contributors!

- Kit Prins & Osamu Hashiramoto – Technical reviews
- Authors from UNECE/FAO Team of Specialists on Forest Products Markets and Marketing
- Christina O’Shaughnessy – Editing
- National statistical correspondents
- Contributors of information and statistics
- 40 people worked directly on the Review
- Plus translators, printers, sales department, distribution, administration
Country market statements

- National policy measures affecting forests and forest products markets
- Developments in forest products markets sectors (major emphasis)
- Market drivers
- Economic trends affecting the forest and forest industries sector
- Tables of forecasts and economic info
Outcomes of today’s discussions

• TC Market Statement
• Market press release
• Information to joint TC and European Forestry Commission website
  – Forecasts
  – Presentations
• Theme for 2007 TC Market Discussions (joint with International Softwood Conference)
Committee is invited to:

• Discuss how China’s forest products trade affects UNECE region markets
• Discuss how public procurement policies influence the trade in our region
• Discuss market and policy developments
• Draft a market statement
• Comment on *Forest Products Annual Market Review, 2005-2006*
Policy questions for TC Market Discussions and Policy Forum

- Questions circulated by e-mail last week
- Designed to stimulate discussion
- Results to be reflected in
  - TC Market Statement
  - Policy Forum report
  - Their press releases
Policy questions for TC Market Discussions and Policy Forum

- How is China’s forest products’ trade (imports and exports) affecting your country's markets?
- Have record high oil prices given incentive for your country to further develop wood energy promotion policies and stimulated new strategies by all players?
- How are your country's public procurement policies influencing your forest products markets (production, imports, exports)?
- What are your countries’ plans concerning national and subnational public procurement regulations requiring legal and sustainable harvested wood products?
Where in the world are the UNECE timber markets?

• Consumption in region
• Region’s trade
• Region’s share of production
• Region’s trade balance
• Abstracted from the *Forest Products Annual Market Review, 2005-2006*
Consumption of primary products
Imports of primary products

- Wood pulp
- Paper & paperboard
- Industrial roundwood
- Panels
- Sawnwood

UNECE region
Rest of the World
Exports of primary products
UNECE region’s trade balance

- Paper and paperboard
- Sawnwood
- Industrial roundwood
- Pulp
- Panels
State of markets & trade in UNECE region

- Record high levels
- Majority of consumption, production and trade, and growing
- Greatest imports = lead responsibility
  - Sustainable development
  - Sustainable management
- Fastest rate of change in eastern Europe and Russia
State of markets & trade in UNECE region

- Majority of world’s temperate forests
  - Growing more than consuming
  - Demand falling behind forests’ growth
- China’s forest products markets increasingly influencing UNECE region
Market demand drivers

- Favourable economic conditions
- US housing starts
- Increasing European residential construction
- China’s rapid expansion
- Public procurement policies
- Corporate social responsibility policies
Game rules for speakers

• Schedule is tight!
  – Be ready, come to head table ahead
  – Don’t exceed allotted time
• Green card = 5 minutes left
• Yellow card = 1 minute left
• Red card = STOP!
Next presentations

• Policy implications of forest products market developments, by Dr. Helmuth Resch and Dr. Jim Bowyer
• China’s forest products markets, by Ms. Jane Guo and Mr. Russ Taylor
• Sustainable forest products industry, carbon and climate change, by Mr. James Griffiths