Panels

Timber Committee forecasts by Mr. Jorge Najera, UNECE/FAO Timber Branch

Expert presentation by
Mr. John Guerin, General Manager, Weyerhauser Darbo SAS, France

Discussion, including Ms. Eva Janssens, European Panel Federation
Highlights of draft Forest Products Market Analysis 2002-2004

- Other Europe subregion boosting the European medium density fibreboard (MDF) industry with massive growth in production.

- Other Europe subregion and the Russian Federation rapidly expanding their export markets.
## EUROC
Total Wood-based Panels

<table>
<thead>
<tr>
<th>% change</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparent consumption</td>
<td>-1.9</td>
<td>+0.9</td>
</tr>
<tr>
<td>Production</td>
<td>0.0</td>
<td>+0.8</td>
</tr>
<tr>
<td>Imports</td>
<td>-1.4</td>
<td>+0.8</td>
</tr>
<tr>
<td>Exports</td>
<td>+2.8</td>
<td>+0.6</td>
</tr>
</tbody>
</table>
Highlights of draft Forest Products Market Analysis 2002-2004

- Russian wood-based panels industry beating all growth records on the back of vigorous domestic demand.

- Other Europe subregion and the Russian Federation rapidly expanding their export markets.
<table>
<thead>
<tr>
<th>% change</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparent</td>
<td>+13.2</td>
<td>+7.8</td>
</tr>
<tr>
<td>consumption</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Production</td>
<td>+12.6</td>
<td>+8.3</td>
</tr>
<tr>
<td>Imports</td>
<td>+13.0</td>
<td>+5.7</td>
</tr>
<tr>
<td>Exports</td>
<td>+11.2</td>
<td>+8.9</td>
</tr>
</tbody>
</table>

RUSSIAN FEDERATION
Total Wood-based Panels

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Sixty-first session, 7-10 October 2003
Highlights of draft Forest Products Market Analysis 2002-2004

- North American panel industry picked up well after serious distress, but particle board overcapacity continues to overload the weak markets.
### NORTH AMERICA
Total Wood-based Panels

<table>
<thead>
<tr>
<th>% change</th>
<th>2003</th>
<th>2004</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apparent consumption</td>
<td>- 0.8</td>
<td>+ 0.3</td>
</tr>
<tr>
<td>Production</td>
<td>- 0.2</td>
<td>0.0</td>
</tr>
<tr>
<td>Imports</td>
<td>+ 0.8</td>
<td>+ 0.9</td>
</tr>
<tr>
<td>Exports</td>
<td>+ 3.8</td>
<td>- 0.6</td>
</tr>
</tbody>
</table>
Europe: Particle board (including OSB)

Production, Imports, Exports
Europe: OSB

Production, Imports, Exports
Europe: Fibreboard
Europe: MDF

European OSB, MDF and particle board prices 2000-2003

Notes: OSB/3 18mm, MDF standard 16-19mm, particle board V100 PF 19mm. Prices from Austria, Germany and Switzerland.
Source: EUWID Wood Products and Panels, 2003
Highlights of draft Forest Products Market Analysis 2002-2004

- Plywood exports from outside the UNECE region continue to expand rapidly in Europe and North America.
North America: Structural panel production

![Graph showing structural panel production from 1995 to 2004 for OSB and Plywood.](image)
OSB prices in the United States 1995-2003

Note: On a 7/16 inch basis.
Highlights of draft Forest Products Market Analysis 2002-2004

• A recent development in the North American structural panel sector is the rapid market share growth of newcomers, in part due to current exchange rates.

• Oriented strand board (OSB) exports from EU/EFTA climbed steeply as the fledgling industry found offshore markets.
United States imports of structural panels, excluding Canada 1997-2002

Notes: Total US imports of OSB were 7.5 million m³ in 2002. Total US imports of softwood plywood were 821,000 m³ in 2002. Source: US Department of Commerce, Census Bureau, Foreign Trade Statistics, 2003
North America: Particle board (without OSB)

.production
.imports
.exports
Particle board prices in the United States 
1995-2003

Note: Underlayment grade on a 3/8-inch basis.
Source: Random Lengths Yardstick, 2003
North America: Fibreboard

Production
Imports
Exports

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North America: MDF

The graph shows the production, imports, and exports of MDF in North America from 1995 to 2004. The production line is represented by a dark blue line, imports by a pink line, and exports by a green line. All data are in 1000 cubic meters (m³).

Production has shown a steady increase over the years, with a slight decrease in 2003. Imports have fluctuated with a peak in 2001, while exports have remained relatively constant with a slight increase in the last few years.
Next presentation

Mr. John Guerin, General Manager, Weyerhauser Darbo SAS, France