

Sawn Softwood

Timber Committee forecasts by Dr. **Chris Gaston**, Group Leader, Markets and Economics, Forintek Canada

Expert presentation is by

- Mr. **Jan Wintzell**, Head, Global Solid Wood Products Business Area, Jaakko Pöyry, UK
 - Dr. **Nikolai Burdin**, General Director, OAO NIPIEIllesprom, Russian Federation
- Discussion

UNECE TIMBER COMMITTEE

Sixty-first session, 7-10 October 2003



Highlights of draft Forest Products Market Analysis 2002-2004 (1-3)

- Globalization is rapidly changing the production, consumption and trade dynamics of sawn softwood.
- The recent competitive price advantages that many sawn softwood producing regions have enjoyed in recent years are disappearing.
- Demand for sawn softwood products in most regions of the UNECE remains strong, especially in North America.

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Highlights of draft Forest Products Market Analysis 2002-2004 (4-6)

- The increased international flows of sawn softwood are also fuelling trade disputes.
- Two regions of the world continue to have the potential to significantly influence the global market dynamics of sawn softwood: Russia (on the supply side with record exports) and China (on the demand side with record imports).
- At 8.6 million m³ in 2002, Russia's exports of sawn softwood exceeded those of the entire former USSR for the first time.

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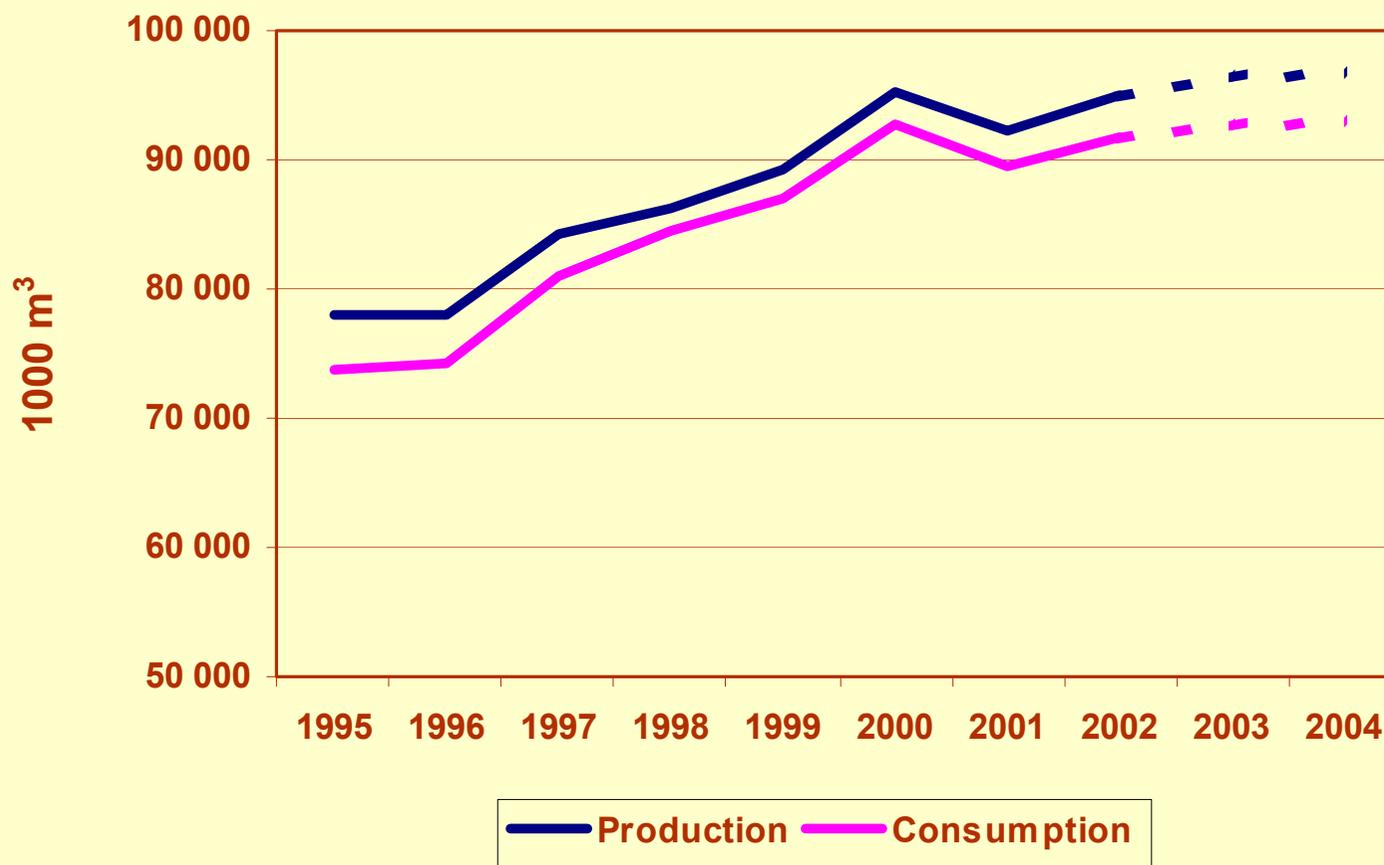


Highlights of draft Forest Products Market Analysis 2002-2004 (7-9)

- Prices for sawnwood in North America were under pressure in 2002, but have begun to recover in mid-2003.
- Prices for sawnwood in Europe rose steadily in 2002.
- Sawn softwood production increased by 6% in the UNECE region, rising in every subregion, and in the EU/EFTA subregion production rose to record levels in 2002.



Europe: Sawn softwood

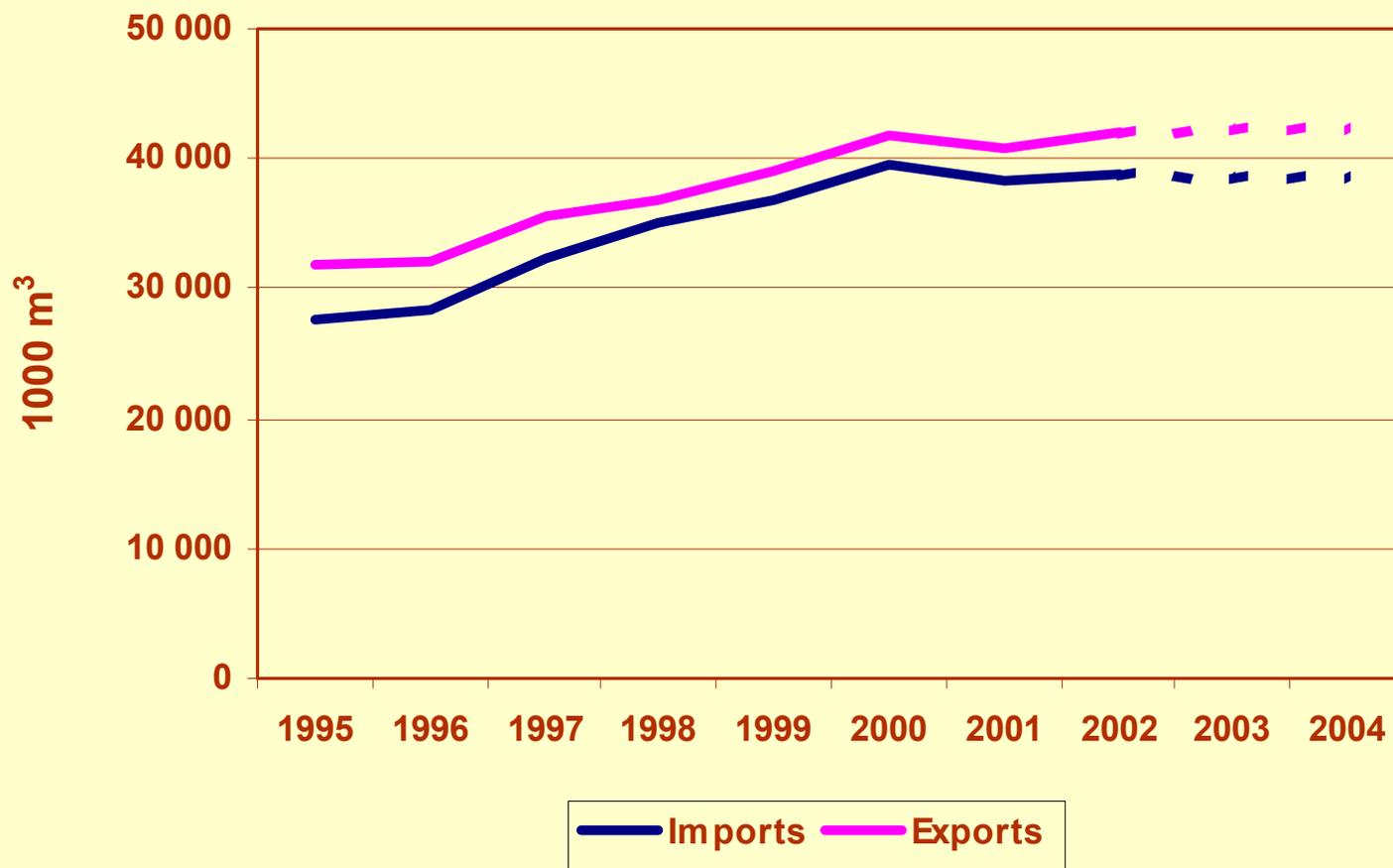


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Europe: Sawn softwood



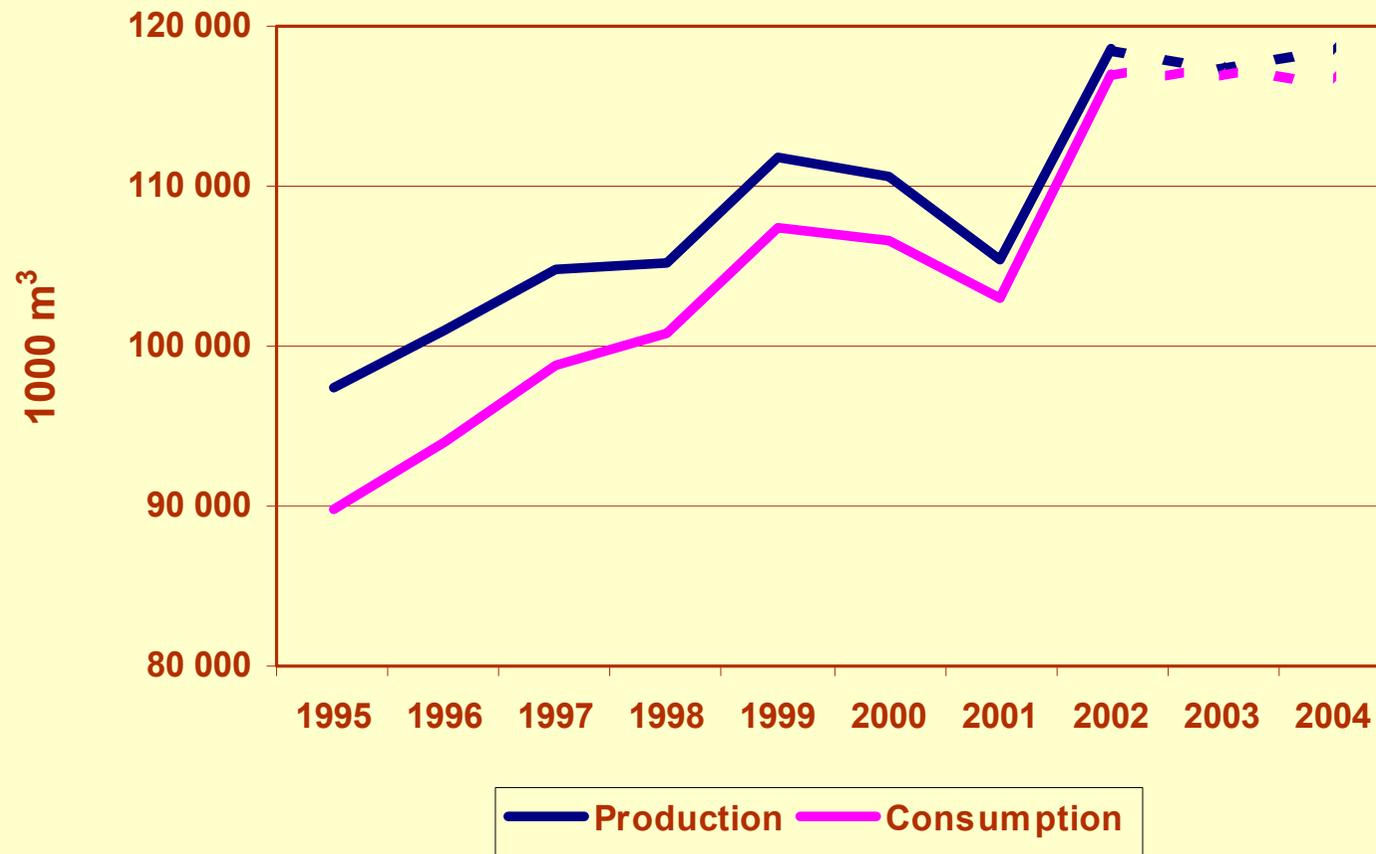
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North America: Sawn softwood



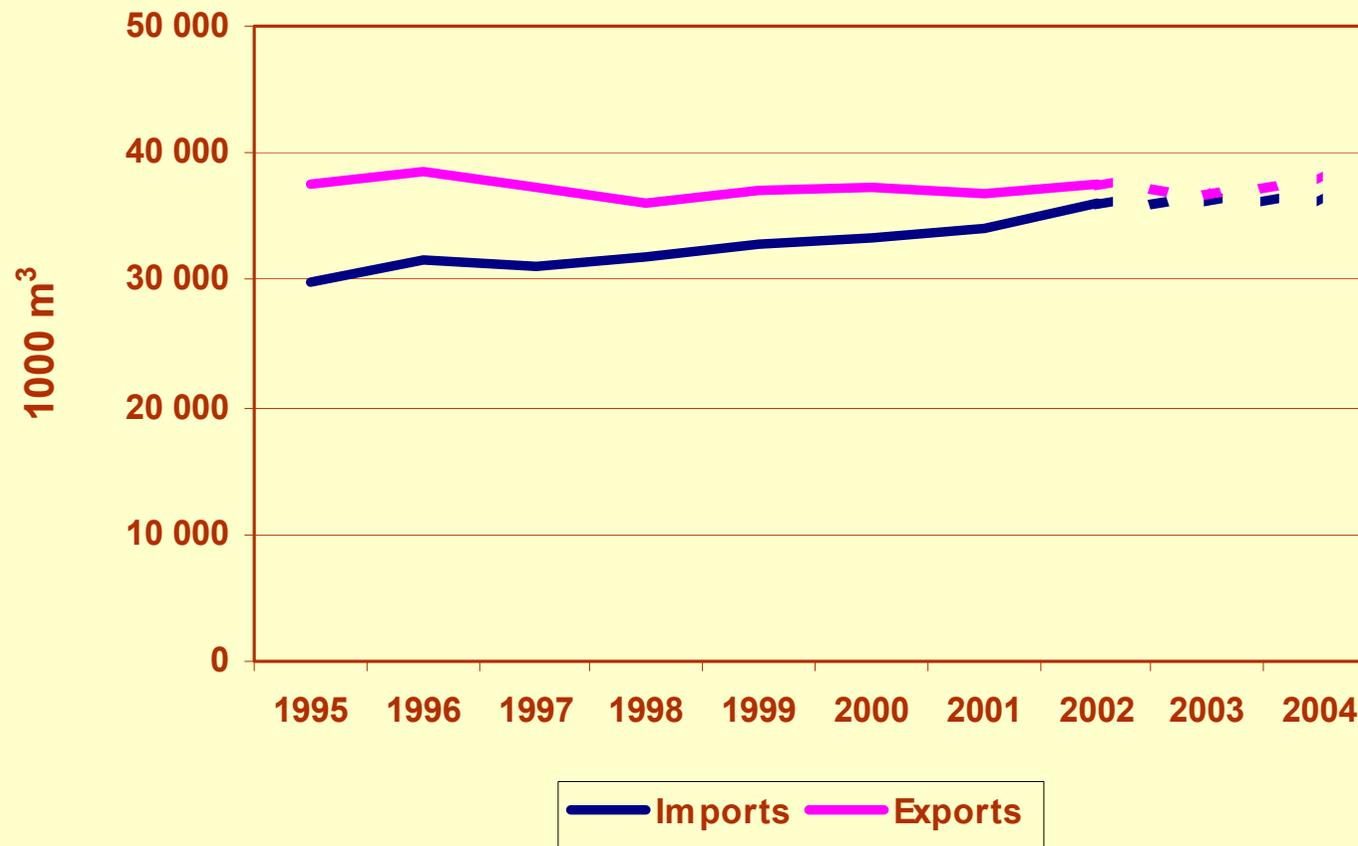
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North America: Sawn softwood

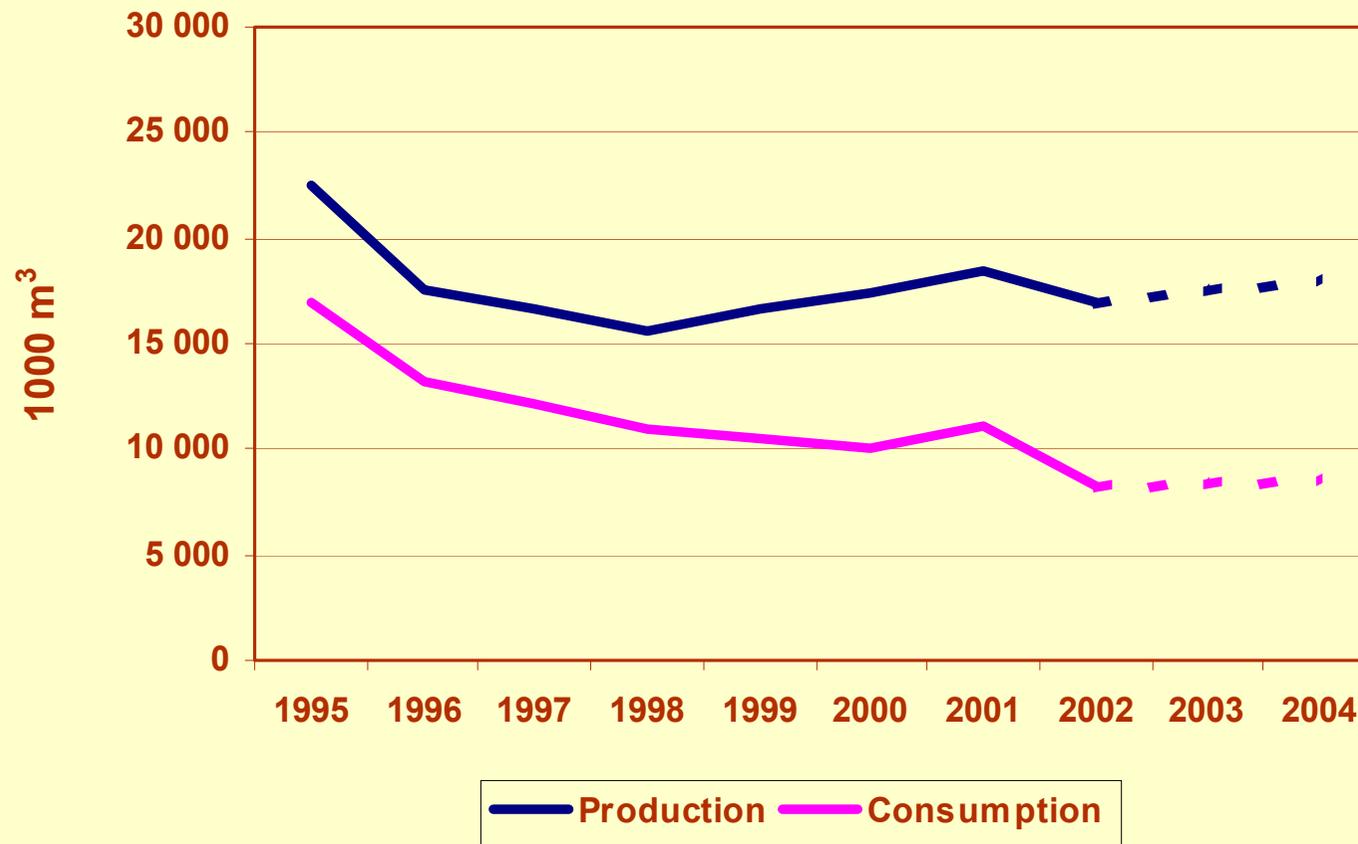


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Russian Federation: Sawn softwood

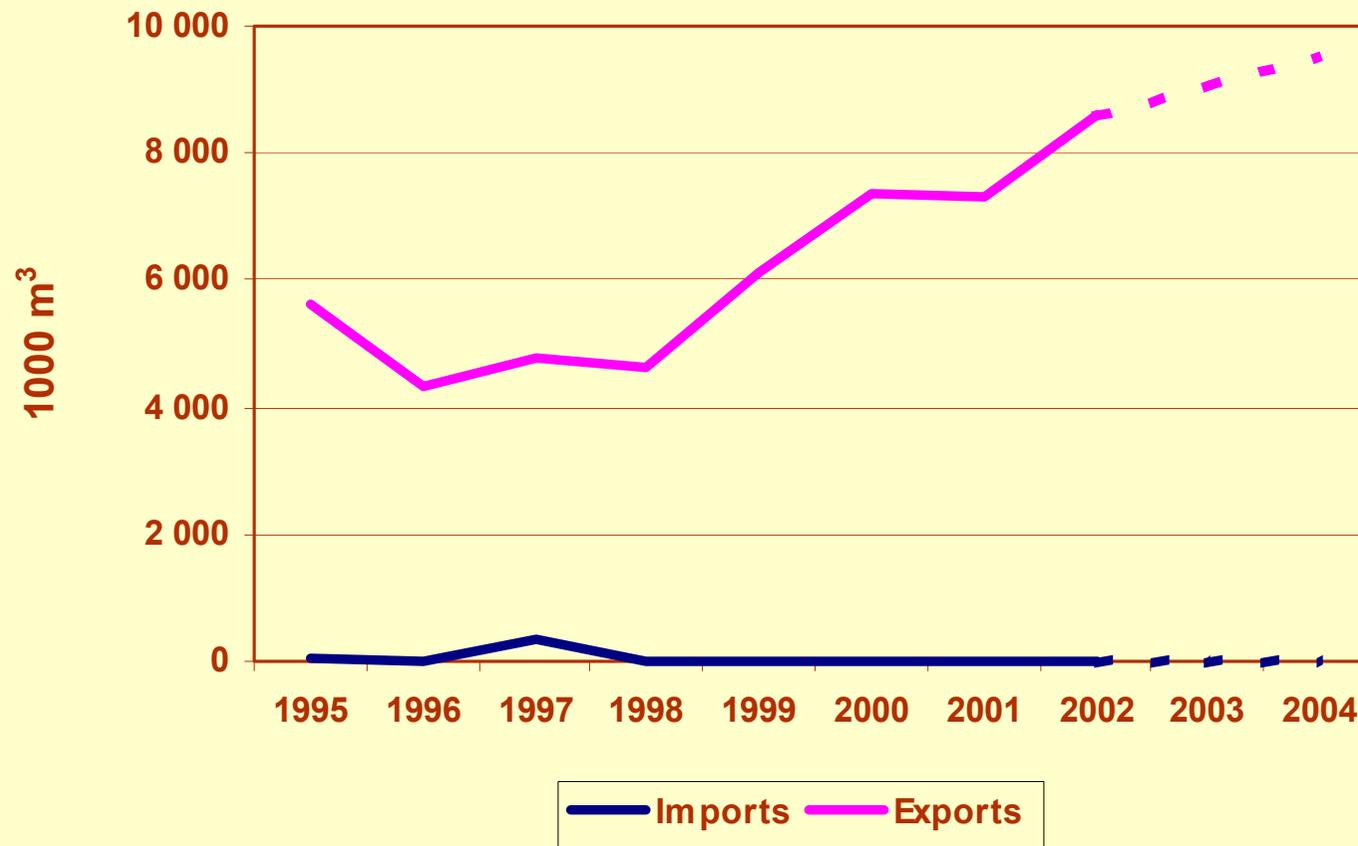


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Russian Federation: Sawn softwood



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Next presentation

Mr. **Jan Wintzell**, Head, Global Solid Wood Products Business Area, Jaakko Pöyry, UK



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