

UNECE Timber Committee Market Discussions

Theme:

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

3-4 October 2006, Geneva



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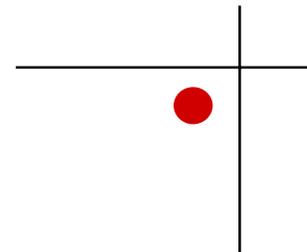


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Market Discussions, 3-4 October 2006





Today's topics

- Policy implications of forest products market developments
- China's forest products markets
- Sustainable forest products industry, carbon and climate change



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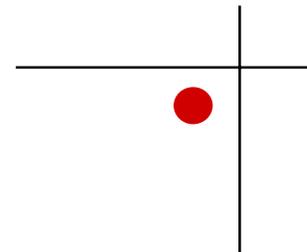


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Tomorrow's topics

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



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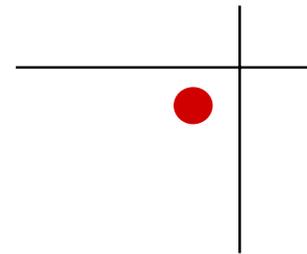


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Info sources

- Country forecasts for 2006 & 2007
- Country market statements
- UNECE/FAO *Forest Products Annual Market Review, 2005-2006*
- Expert presentations
- Delegates' interventions in discussions



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UNECE/FAO *Forest Products* *Annual Market Review, 2005-2006*

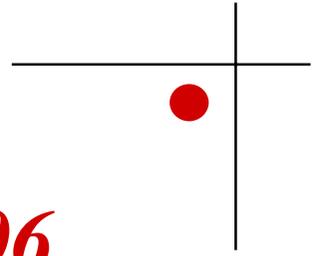


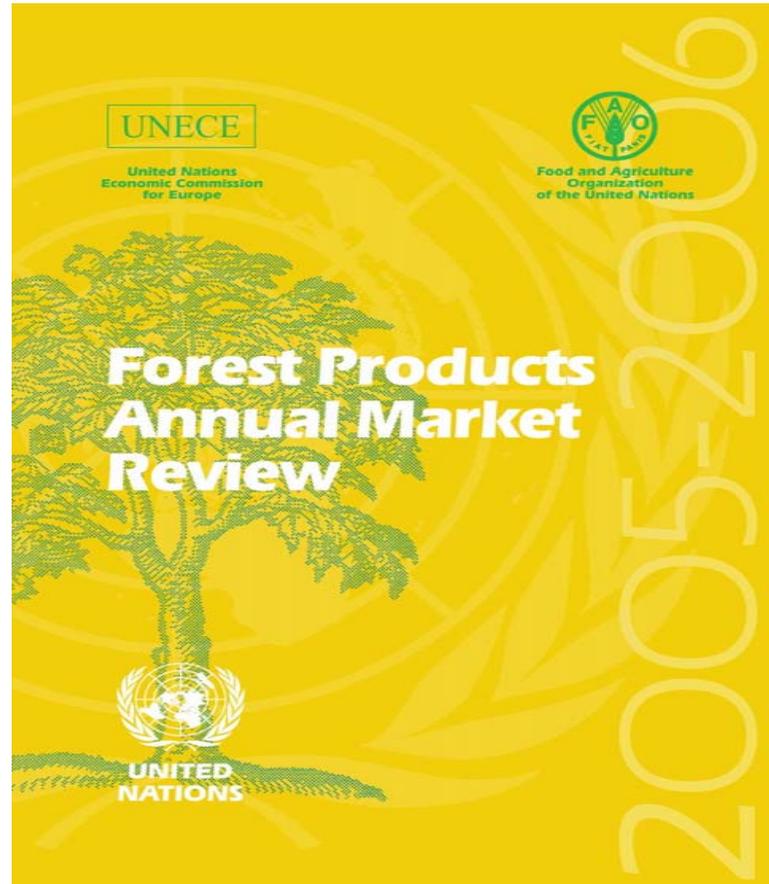
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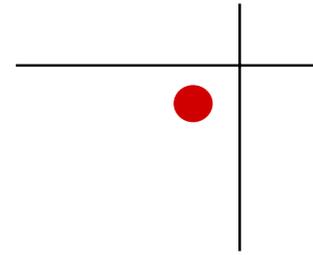
- Produced summer 2006
- On website in August
- Printed in September
- Russian in 5 months
- French in 7 months
- Executive summaries available in English and Russia



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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



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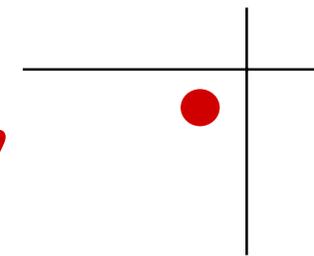
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And thanks to all contributors !



- 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



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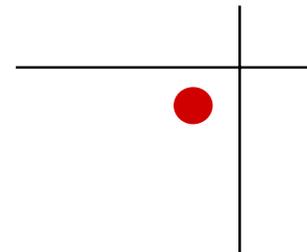


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Country market statements

- 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



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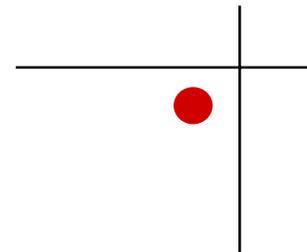


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Outcomes of today's discussions

- 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)



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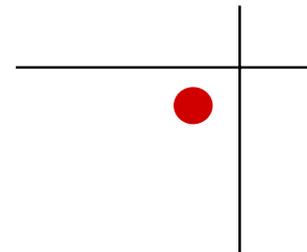


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Committee is invited to:

- 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*



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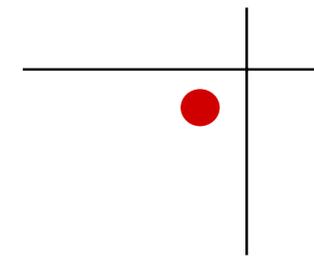


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Policy questions for TC Market Discussions and Policy Forum

- 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



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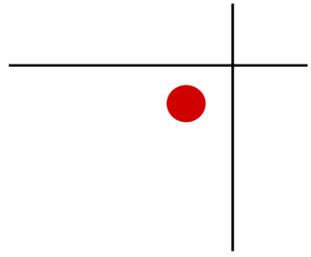
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Policy questions for TC Market Discussions and Policy Forum



- 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?



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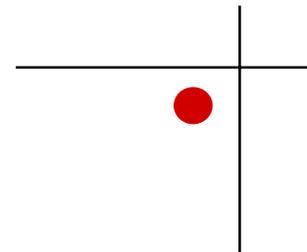


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Where in the world are the UNECE timber markets?

- 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*



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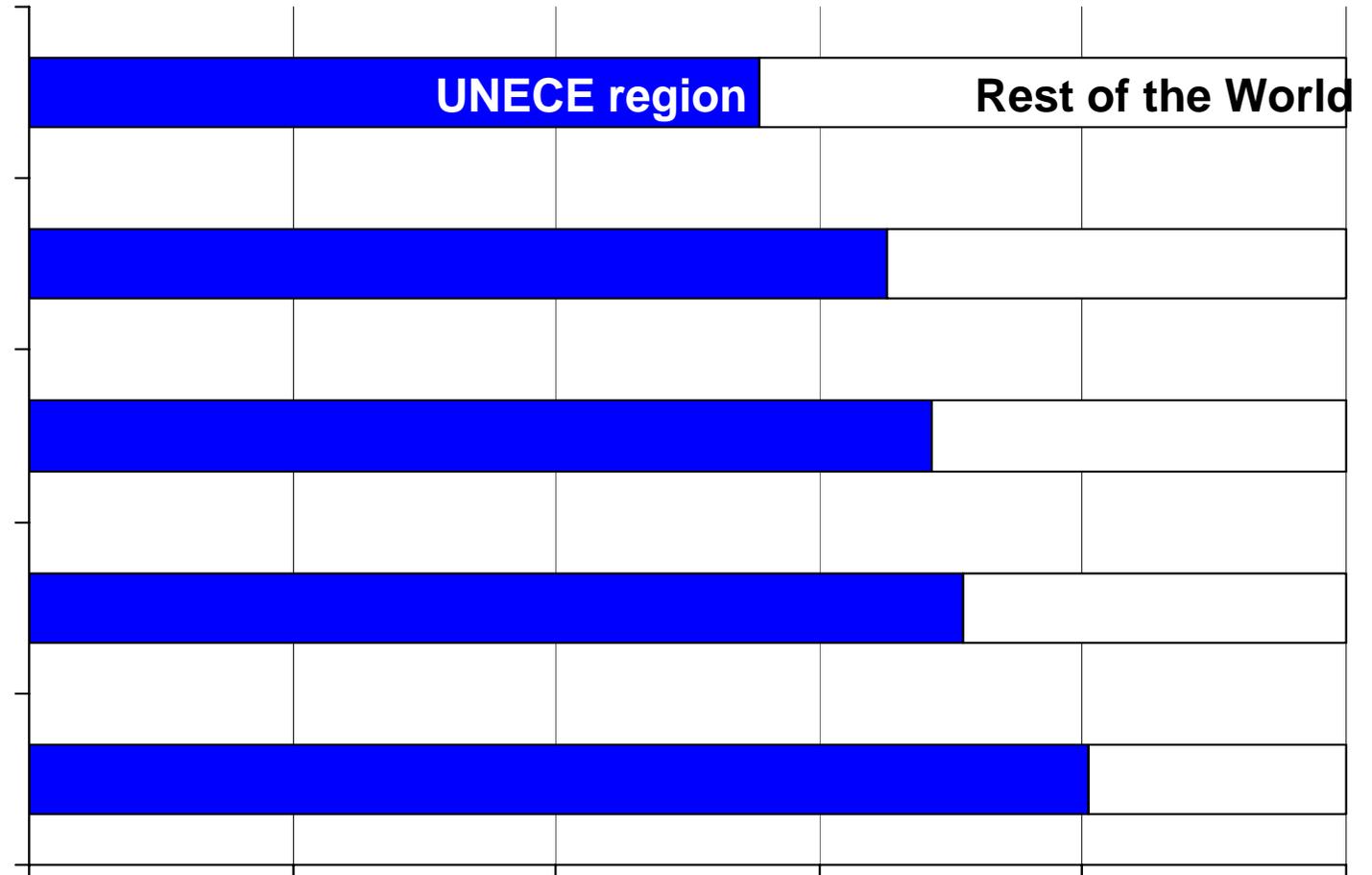
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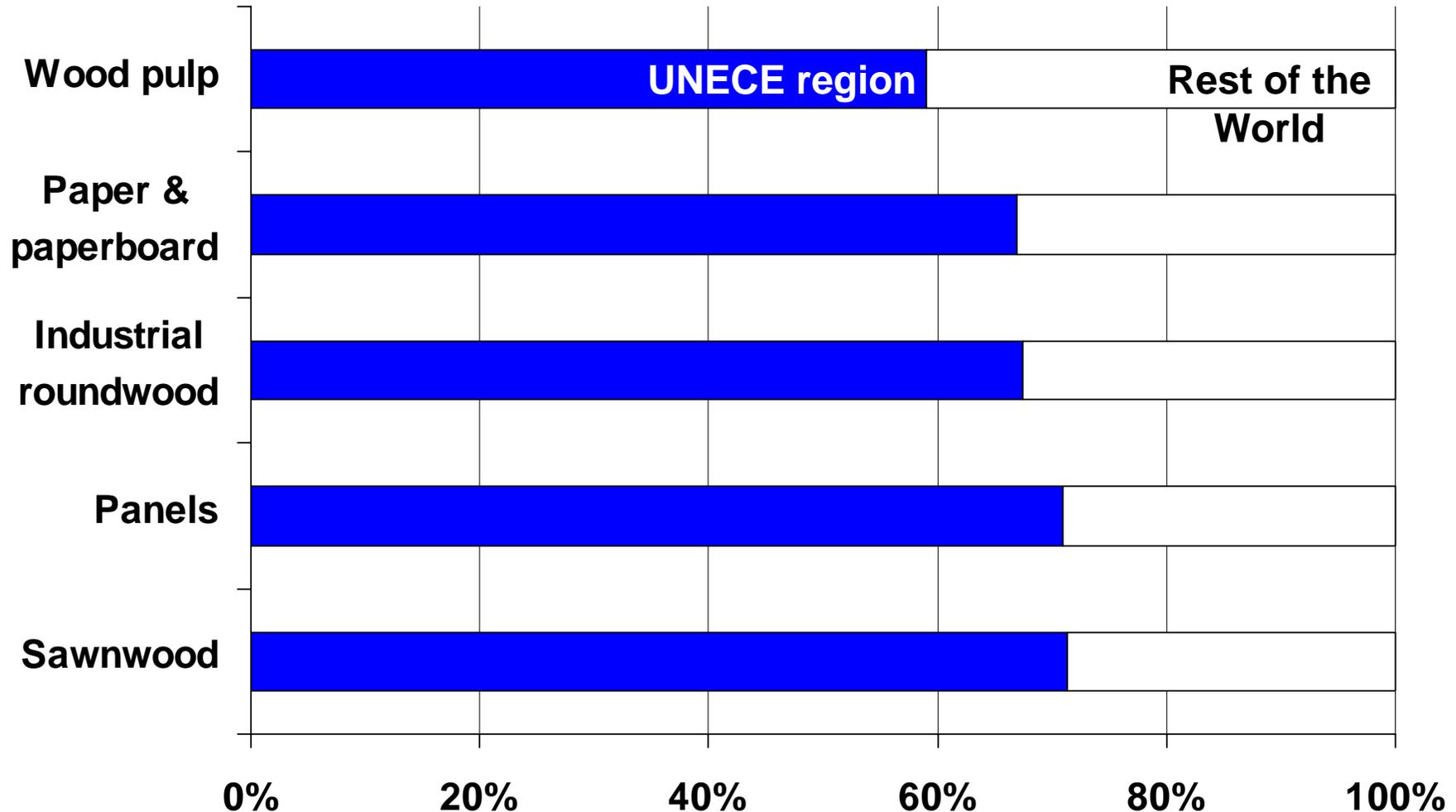
Consumption of primary products



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Imports of primary products



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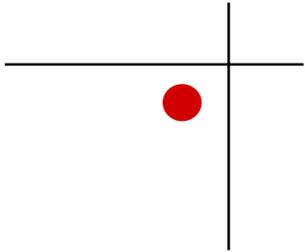
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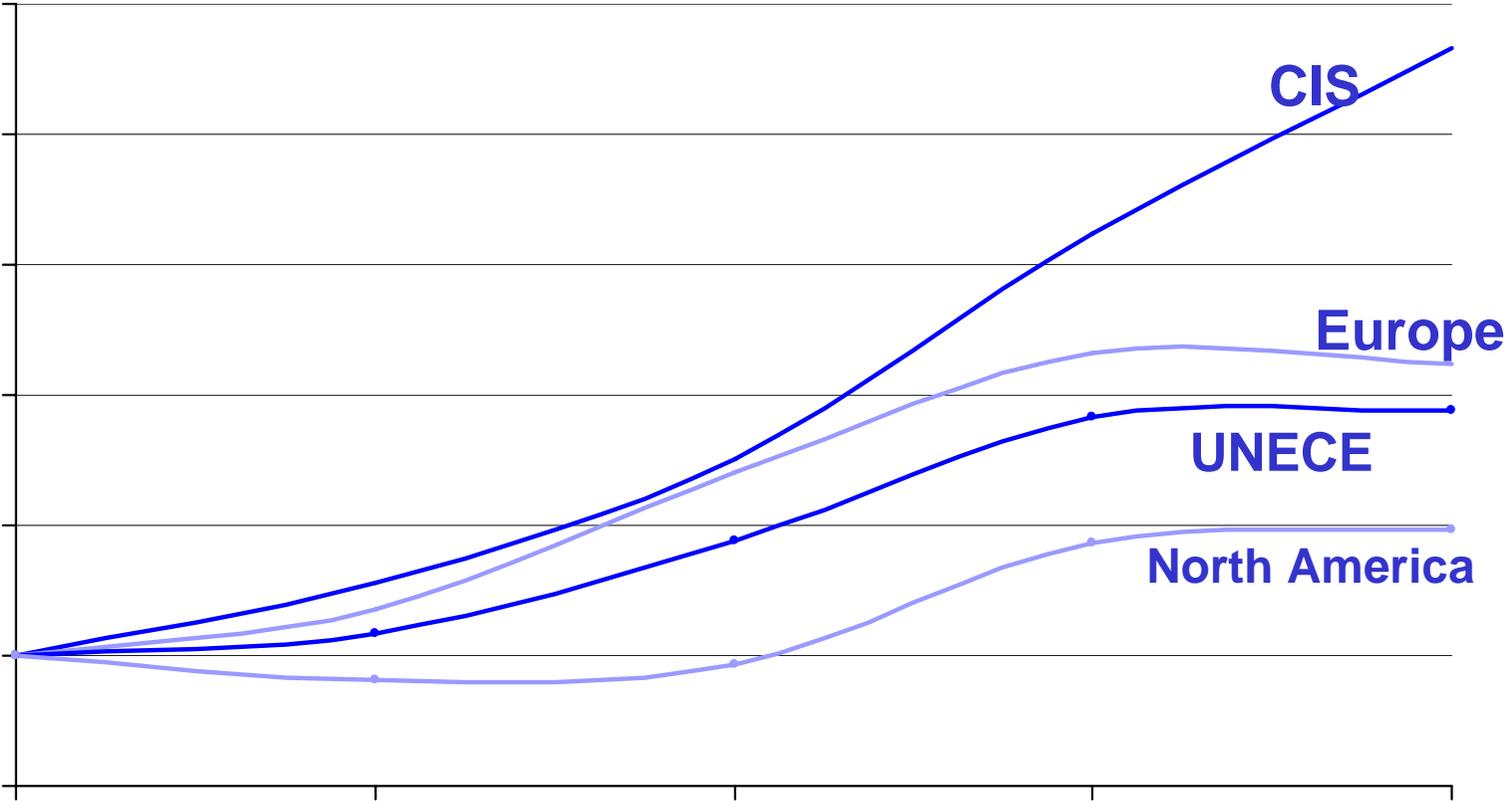
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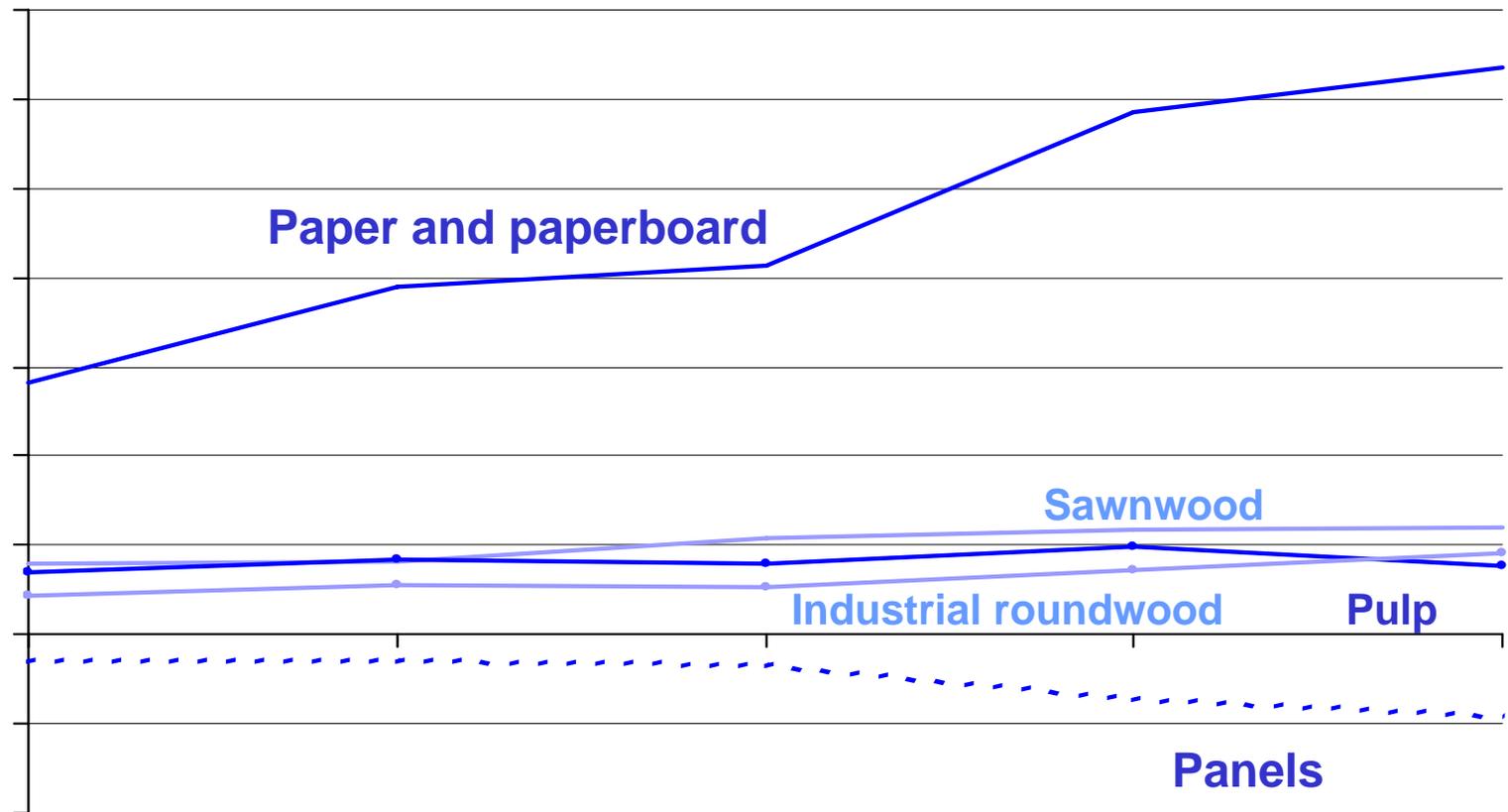
Exports of primary products



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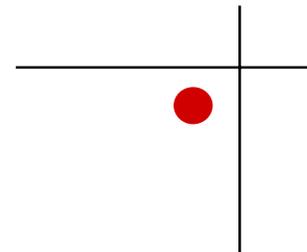


UNECE region's trade balance



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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



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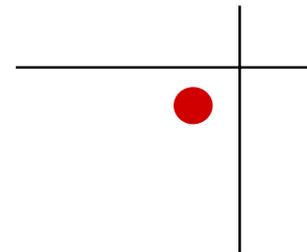


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State of markets & trade in UNECE region

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



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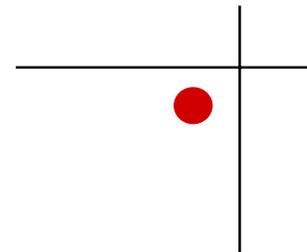


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Market demand drivers

- Favourable economic conditions
- US housing starts
- Increasing European residential construction
- China's rapid expansion
- Public procurement policies
- Corporate social responsibility policies



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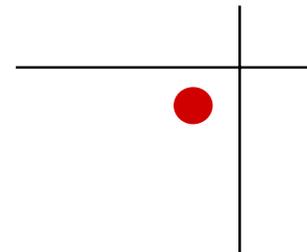


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Game rules for speakers

- 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 !



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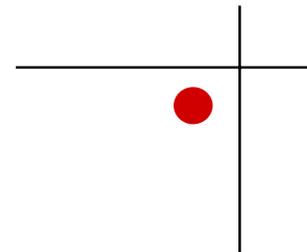


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Next presentations

- 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



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