

Hardwood Markets in 2003-2005

American Hardwood Export Council
12th Annual Convention

Venice, Italy 20-22 October 2004

by

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Hardwood Markets and Marketing
AHEC American Hardwood in Europe Convention
Venice, Italy 20-22 October 2004





Benvenuto a Venezia !

(Welcome to Venice!)



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Content of presentation

- Highlights of the hardwood chapter in the *Forest Products Annual Market Review, 2003-2004*
- Forecasts for 2004 and 2005
- UNECE Timber Committee market statement on hardwoods



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Sources of info

- UNECE/FAO *Timber Bulletin*, "Forest Products Annual Market Review, 2003-2004"
- UNECE Timber Committee market forecasts and statement, 2004-2005
- UNECE/FAO TIMBER database (forest products statistics)



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Hardwood chapter highlights

- Sawn hardwood production in the UNECE region rose during 2003
- Consumption of sawn hardwood in the UNECE region increased in 2003
- Exports fell, due to a weakening in demand from Asian markets
- Consumption of sawn hardwoods in western Europe increased by 9.1% in 2003

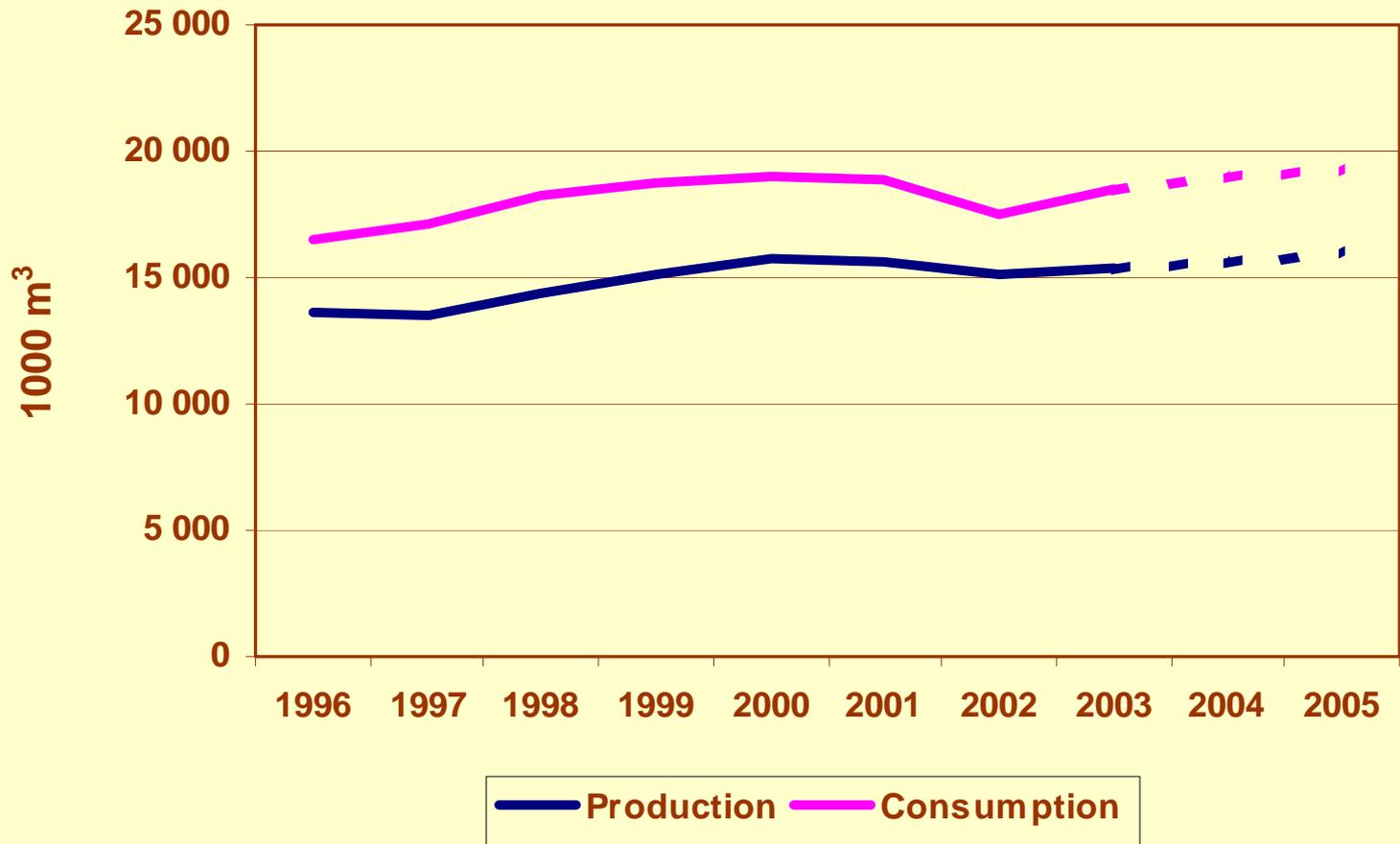


Hardwood chapter highlights

- EU production and consumption of hardwood flooring rose once again in 2003
- Production, trade and consumption of sawn hardwood all grew in central and eastern Europe
- CIS subregion production and consumption of sawn hardwoods are forecast to rise slowly
- US production of sawn hardwood increased in 2003



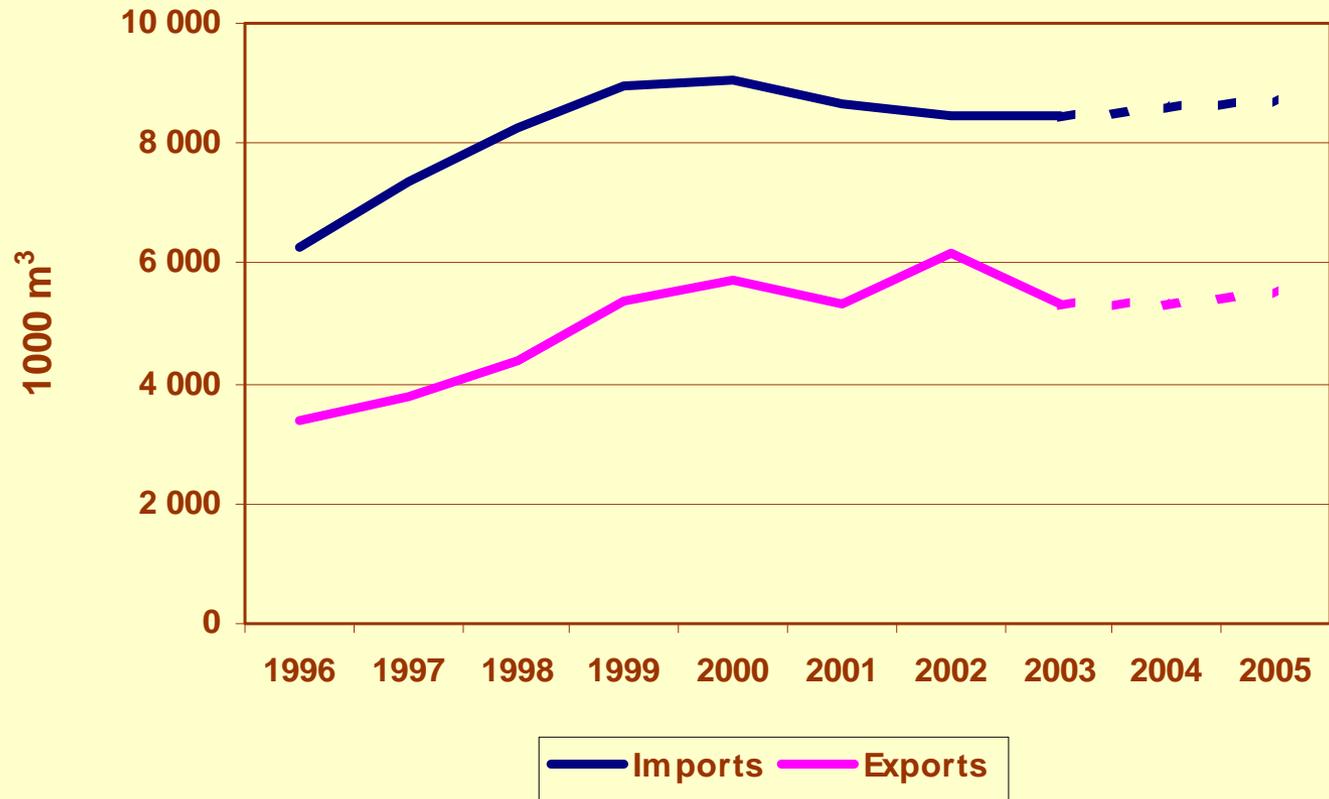
Europe: Sawn hardwood



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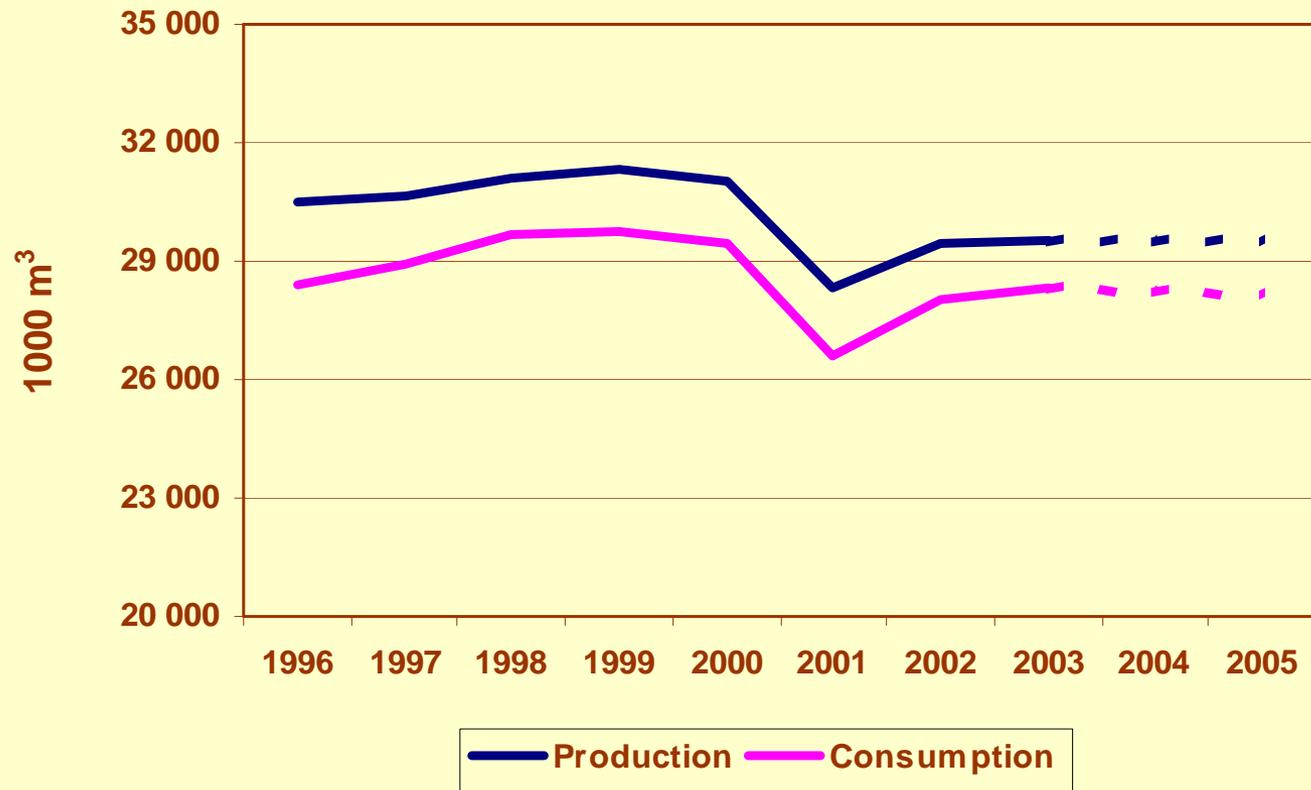
Europe: Sawn hardwood



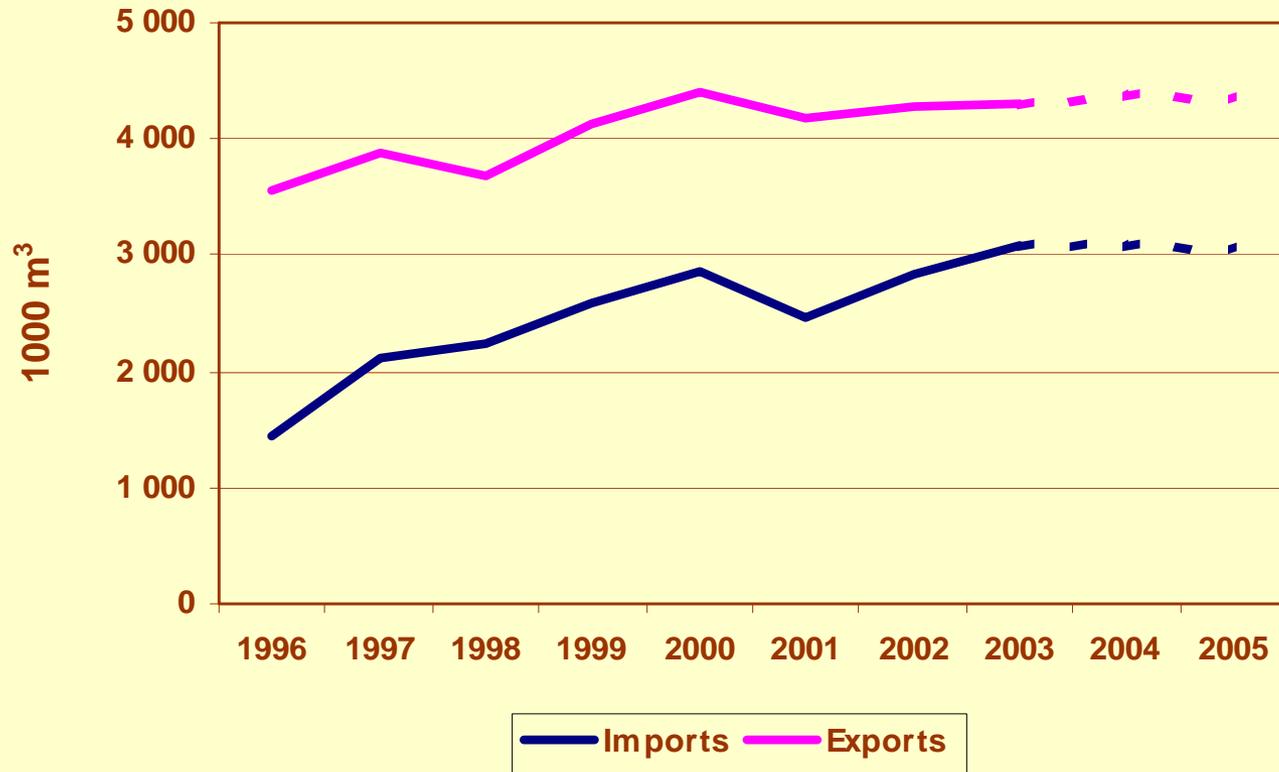
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North America: Sawn hardwood



North America: Sawn hardwood



Hardwood at the 2004 Timber Committee

- Sawn hardwood markets are forecast to grow in Europe, confirming market recovery
- Trade is active and forecast to grow in 2004 and 2005
- US exports approaching 3 million m³



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Hardwood at the 2004 Timber Committee

- Some European producers, e.g. Romania, are forecasting fast growth in production and exports
- Certified hardwood markets are driven by architects' demand, especially for publicly-financed projects



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Sunset?

No, sunrise !

8 9 2004



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