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## France

### Forest Products

### Forest Product Annual Report

### 1999

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#### Report Highlights:

**In CY 1999, the French wood sector has come out of a deep economic recession. Housing starts and building renovation are increasing, and so are wood uses, both in construction and furniture. The United States, although a marginal supplier of hardwood and softwood lumber to France, has gained some markets by providing high quality products praised by French importers. However, U.S. wood exports to France have suffered as the dollar has strengthened in 1998 and 1999. The severe storm of December 1999 will result in additional domestic supplies of wood, putting pressure on prices and on U.S. exports.**

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Includes PSD changes: Yes

Includes Trade Matrix: Yes

Annual Report

Paris [FR1], FR



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Acronyms used in this report:

CUM: Cubic Meter

GDP = Gross Domestic Product

MDF = Medium Density Fiberboard

FAS = Firsts and Seconds grade wood, used for high quality furniture, interior joinery and solid wood moldings

Sq. = Square

USD = U.S. dollar

TVA = Value Added Tax (20.6 percent, ad valorem)

FNB = French Wood Association

CTBA= French Technical Center for Wood

BNBA= Wood and Furniture Standardization Bureau

THL Temperate Hardwood Log

TPL Tropical Hardwood Log

THB Temperate Hardwood Lumber

TPB Tropical Hardwood Lumber

## EXECUTIVE SUMMARY

The wood sector in France employed in 1997 about 160,000 workers in 35,000 companies with a total turnover of about USD 23 billion. This sector is supported by the State through the Ministry of Agriculture and the Ministry of Industry, and by regions, counties and by the European Union. The wood industry suffered from the recession that hit the French economy between 1992 and 1996 which, in turn, reduced activity in the construction sector.

However, since the early months of 1998, a rebound in economic activity has led to a surge in housing starts, especially for single family dwellings. Preliminary data for 1999 show that the construction industry continues to improve, giving relief to the wood sector. Most wood subsectors including the joinery, wood panel and furniture industries will fare much better in CY 1999. By reducing the VAT on most building related work in September 1999, the Government of France (GOF) aims to enhance this trend. Moreover, recent studies show that consumers are using more wood products for housing and furniture. Wood is now perceived as a more “natural” and environmentally friendly material than plastic or metal.

In CY 1998, total French wood and wood products exported amounted to USD 3.1 billion while imports reached 4.2 billion. Apart from some lumber and plywood trade, most French exports and imports are within the European Union. The United States provided about 5 percent of France’s total wood product imports (in value), the lion’s share of France’s imports of temperate hardwood logs and lumber, 4 percent of imported plywood and a residual but growing amount of imported softwood lumber. In the future, U.S. wood exporters will have to compete with either domestic wood producers, as domestic production of precious temperate hardwood increases and as competition increases from EU and Eastern European countries.

While nearly 80 percent of U.S. hardwood exports to France are used in the furniture industry, U.S. hardwoods are also used for flooring, moldings and paneling. U.S. exporters are able to more consistently provide large volumes of logs and lumber, compared to the smaller domestic suppliers. Users also praise the quality of the U.S. wood, especially in the furniture industry. In France, U.S. wood products are imported either through agents, who sell them to small and medium sized users, or directly from the United States by the largest users. Preliminary data for CY 1999 show that U.S. wood exports to France will remain stagnant, due to the high value of the U.S. dollar and an increased competition from domestic suppliers, especially for oak.

**LAST MINUTE ADDITION:** Two very strong hurricanes hit France on December 26 and 27, 1999. Damages to forests are still being assessed, but it was estimated by December 29 that over 50 million CUM of trees were uprooted of which 31 million CUM of public forest. Both softwood and hardwood forests were affected by the gale, and many very old trees of high quality wood were damaged. Such large and unexpected supply is likely to depress domestic softwood and hardwood prices and further compete with imported wood. U.S. exports of hardwood in CY 2000 , which Post was forecasting to remain stagnant, are likely to decline because of the French supply situation. Revised PS&Ds will be provided when more information becomes available.

IMPORTANT NOTE: Data in this report are gathered from different sources. Production data come mainly from the French Ministry of Agriculture, the French Ministry of Industry and the Technical Center for Wood and Furniture. Trade data come mainly from Customs, French Ministry of Agriculture and French Wood Trade Associations. These data often present significant discrepancies, especially between PS&D and Trade Matrices. Post has chosen to use the most accurate and reliable data for the PS&Ds, while trade matrices, due to the problems with the custom classifications and errors and the conversion from metric tons to cubic meters, may not accurately gauge the volume of trade but instead should be used to reflect the relative shares of the different suppliers and customers of wood and wood products.

Average Exchange Rate used in this report for CY 1998: USD 1.00 = FF 5.90

**FOREST PRODUCT STRATEGIC INDICATOR TABLE**

FOREST PRODUCT						
STRATEGIC INDICATOR TABLES FOR FRANCE						
(Please do not add/delete rows or columns -- note and other info must be added below row 110 -- thank you!)						
CONSTRUCTION MARKET						
Country: FRANCE	Previous	Current	Following			
Report Year:	Calendar Year	Calendar Year	Calendar Year			
Total Housing Starts (thousand units)	N/A	N/A	N/A			
--of which, wood frame (thousand units)	N/A	N/A	N/A			
--of which, steel, masonry, other materials (thousand units)						
--of total starts, residential (thousand units)	285	300	315			
---of residential, single family (thousand units)	175	190	205			
---of residential, multi-family (thousand units)	125	135	150			
--of total starts, commercial (thousand units)	N/A	N/A	N/A			
Total Value of Commercial Construction Market (\$US mil)	N/A	N/A	N/A			
Total Value of Repair and Remodeling Market (\$US million)	N/A	N/A	N/A			
FURNITURE & INTERIORS MARKET						
Country: FRANCE	Previous	Current	Following			
Report Year:	Calendar Year	Calendar Year	Calendar Year			
Total Housing Starts (number of units)	N/A	N/A	N/A			
Total Number of Households)	23,500	23,500	23,500			
Furniture Production (\$US million)	3,068	3,220	3,350			
Total Furniture Imports (\$US million)	1,893	2,000	2,150			
Total Furniture Exports (\$US million)	1,014	1,100	1,200			
Interiors Market Size (\$US million)	3,947	4,120	4,300			
MATERIAL HANDLING MARKET						
Country: FRANCE	Previous	Current	Following			
Report Year:	Calendar Year	Calendar Year	Calendar Year			
Total Value of Industrial Output (\$US million)	N/A	N/A	N/A			
New Pallet Production (million units)	39,900	40,500	41,000			
FOREST AREA						
Country: FRANCE	Previous	Current	Following			

Report Year:	Calendar Year	Calendar Year	Calendar Year			
Total Land Area (million hectares)	54,919	54,919	54,919			
Total Forest Area (million hectares)	16,250	16,380	16,500			
--of which, Commercial ('000 hectares)	15,000	15,050	15,100			
---of commercial, tropical hardwood ('000 hectares)	0	0	0			
---of commercial, temperate hardwood ('000 hectares)	9,500	9,560	9,610			
---of commercial, softwood ('000 hectares)	4,800	4,840	4,880			
Forest Type						
--of which, virgin ('000 hectares)	N/A	N/A	N/A			
--of which, plantation ('000 hectares)	N/A	N/A	N/A			
--of which, other commercial (regrowth) ('000 hectares)	N/A	N/A	N/A			
Total Volume of Standing Timber (thousand cubic meters)						
--of which, Commercial Timber ('000 cum)						
Annual Timber Removal ('000 cum) 1/	34,000	34,000	84,000			
Annual Timber Growth Rate ('000 cum)	83,000	83,500	84,000			
Annual Allowable Cut ('000 cum)	N/A	N/A	N/A			
1/ If Removals exceeds growth rate, analyze impact in text.						
WOOD PRODUCTS SUBSIDIES						
Country: FRANCE	Previous	Current	Following			
Year of Report	Calendar Year	Calendar Year	Calendar Year			
Total Solid Wood Export Subsidy Outlay (\$US million)	0	0	0			
Is there a ban on the export of logs, lumber, or veneer? 1/	no	no	no			
Are there export taxes (yes/no)? 2/	no	no	no			
Total Wood Production Subsidy (\$US million)	421	430	450			
Scope (thousands of hectares)	N/A	N/A	N/A			
Are there other wood products export expansion activities? 1/	N/A	N/A	N/A			
1/ If yes, describe in report.						
2/ If yes, identify in Tariff and Tax Strategic Indicator Table.						
FOREST PRODUCT TARIFFS AND TAXES (percent)						
Country: FRANCE	Product	Tariff Current	Tariff Following	Other Import	Total Cost of Import 2/	Export Tax
Report Year:	Description 1/	Year	Year	Taxes/Fees		
	4401					
	4403					
	4404					

4405						
4406						
4407						
44071010		15.00				
44071031, 44071033, 44071038		10.80				
44077071		13.80				
4407910		15.00				
44079131, 44079139		10.80				
44079150		15.00				
44079210, 44079250		15.00				
44079230		10.80				
44079910		15.00				
4407950		17.00				
4408						
44089011		17.40				
44089021		13.00				
44089025		3.40				
44089081		14.40				
4409						
4410						
4411		22.60				
4412						
441219		22.60				
4413						
4414						
4415						
4416						
44160010		7.60				
44160090		14.80				
4417						
4418						
4419						
4420						
4421						
44211000		3.40				
44219010		0.50				
44219030, 44219050		0.90				
44219070		16.90				
44219050		9.70				
44219091		1.00				

	4422					
	4423					
	4424					
	4425					
Pre-fabricated Houses, a subsection under chapter 96						
	94060010	pre-fabricated constructions, in wood	17.40			
1/ Insert additional lines for Commodity tariff identification should tariffs vary within the four-digit designation for major products exported by the U.S. (e.g., 4412.19: softwood plywood 3%, 4412.XX: other plywood, 9%).						
2/ Calculate as tariff plus other import taxes/fees assuming a commodity value of \$100.						

## WOOD SECTOR

### General outlook

The wood sector in general includes companies involved in activities from tree cultivation and harvesting, wood lumbering and wood trade, to the production of wood products such as furniture, wood frames, and joinery. It employed in 1997 (last data available) about 160,000 workers in 35,000 companies and has a total turnover of about USD 23 billion. Most of the companies are small: fewer than 1,900 of them are employing more than 20 workers.

The wood industry suffered from the recession that hit the French economy between 1992 and 1996. Employment has decreased by more than 10 percent since 1990 while the number of enterprises, especially in the construction and furniture sectors, has shrunk. However, investment remained high with an average USD 340 to 420 million invested yearly in this sector.

### Public support of the wood industry

Forest production in France has been encouraged by the State since the XVIth century when wood was a strategic material used to build warships. Today's French Republic continues to support wood planting. The Ministry of Agriculture itself manages more than 3.4 million hectares of state or city owned forests through a governmental organization, the "Office National des Forêts" (National Forest Office). The Ministry of Agriculture also manages the National Forestry Fund (FFN), a special treasury account. Its revenue comes from a tax on wood-based products and the land clearance tax. Since 1947, with the financial help of the FFN, private owners and cities have planted or replanted 2.2 million hectares of forest. These plantings have been carried out on farmland, meadows, fallow and heath. The annual plantation rate is about 20,000 hectares. In the early years of the FFN, most of the trees planted were coniferous, which led to a rise in softwood production of about 10 million CUM by 2010. However, since the early 1980's, temperate hardwood species have been more favored, including precious hardwoods such as red oak, cherry, ash, sycamore and timber walnut. The FFN also subsidizes building and improvement of forest tracks and roads. The Ministry of Agriculture also uses European Union (EU) rural development funds to improve forest management in rural areas. The French National Statistical Institute (INSEE) estimated in CY 1998 public support to productive forestry at USD 230 million.

The wood industry also benefits from supports from the State through the Ministry of Industry and Trade as well as from the regions and counties, to modernize its equipment. Details of such support are not available as they are given on a case-by-case basis.

## CONSTRUCTION SECTOR

### General

In 1998, residential housing starts totaled 285,000 units, up 9 percent from CY 1997. Commercial building starts totaled 320,025 sq.meters (unit figure is not available), up 9 percent from CY 1997. Collective residential housing starts were up by 32 percent. Preliminary estimates for CY 1999 show a surge in housing starts, driven by the end of the economic recession in France. The house renovation industry is also likely to have grown significantly in CY 1999, driven by a decrease in VAT on building and renovation related works initiated by the GOF in September 1999. All those trends will certainly lead to growth in the wood construction sector.

Wood demand in France for home construction, while growing, has been mainly for decorative purposes. French builders of wood homes are now trying to emphasize the other aspects of wood such as positive thermal, acoustic, and ecological qualities, cleaner work-sites and less construction delay.

### **Wood Panel Sector**

In spite of a global surge in demand for plywood due to the growth in the construction and furniture industries, U.S. plywood exports to France decreased slightly in CY 1998. This decrease is mainly attributed to strength of the U.S. dollar and an increased competition from both domestic and EU suppliers. However, French plywood importers appreciate the ability of U.S. exporters to reliably provide large volumes of high quality softwood plywood.

### **Wood Frame Housing**

Data are not available for CY 96, 97 and 98. A total of 5,000 wood housing units was constructed during CY 1995, of which 2,500 were individual houses. Woods used in wood frame residential housing are generally of French origin, usually fir or spruce. If imported, the wood may come from Germany, Austria or Scandinavia, and the solid wood for housing construction usually is French, Scandinavian or Canadian. Logs and lumber of U.S. origin are usually too expensive compared to the price of domestic or northern European log and lumber.

### **Opportunities for U.S. Business**

U.S. home manufacturers, with their experience and expertise in the wooden home construction industry, now have opportunities in France. American expertise in the field of wood frame construction, starting at the sawmill and continuing all the way to the finished house, has greatly interested French industry experts. Moreover, French homebuilders are interested in using U.S. standards and specifications for their industry.

U.S. manufacturers and exporters interested in more information should contact

*Mr Loic de Saint Quentin, General Secretary,  
Association des Entreprises Françaises de Construction en Bois, (AFCOBOIS),  
10, rue du Débarcadère, 75017 Paris, Tel: (33) 1 40 55 14 98 Fax: (33) 1 40 55 14 97*

### **Joinery**

Beginning in the 1980's, French consumers have moved from wooden and metal frames to plastic polyvinyl chloride (PVC). PVC window frames were used primarily in the renovation market, with aluminum in multi-family housing and wood in individual homes. While PVC has been the fastest growing material used for windows, individual home owners still prefer wood. However, it appears now that durability of PVC window frames is shorter than previously expected. Moreover, some French insurance companies may follow their German counterparts by providing fire insurance discounts for houses using wood frame windows instead of PVC frames (which emit toxic fumes when burning).

Contacts for Interested U.S. Exporters

*Syndicat National de la Fabrication des Menuiseries Industrielles (SNFMI)  
30, avenue Marceau, 75008 Paris, Tel: (33-1) 47 20 17 32 Fax: (33-1) 47 20 76 31*

### **Wood Floor Industry**

Between 1990 and 1995, the French wood floor industry enjoyed double-digit growth figures. After a slowdown in

CY 1996 and 1997, it now seems likely that the upturn in the construction industry will benefit the wood floor industry in CY 1998 and 1999. However, due to the competition from Asian and Eastern European suppliers, prices are likely to remain sluggish, especially in the lower and middle-price part of the market. Nevertheless, according to consumer surveys, the high price of wood flooring is still a major brake on demand, despite a very good image of quality and durability.

In France, there is a demand for “ecological” and “natural” products, which helps sell wood, especially wood flooring. Most (50-70 percent) French wood floors are oak, but light wood species (such as maple and beech but not ash) are becoming more popular with the French public. Wood flooring used renovations represents 50 percent of total French wood floor consumption.

U.S. temperate hardwood is a good alternative for French flooring producers, who, above all, appreciate the ability of U.S. suppliers to provide large volumes of lumber of homogenous quality and precise thickness size (although some shipments reportedly have had inadequate sawn width sizes).

## FURNITURE INDUSTRY

### General

The growth in the furniture industry is closely linked with the growth of the construction industry. Furniture is often purchased during a first moving-in or, during a removal, to complete or replace existing furniture. As the construction sector is slowly rising from the deep recession of the past years, French furniture industry production grew by an estimated 8 percent in CY 1998. Estimates for CY 1999 show a continuation of the growth, both for the office furniture and for the household furniture.

### Furniture Distribution System in France

The four largest furniture distribution channels in France are large furniture outlets (45 percent of sales), smaller traditional furniture stores (20 percent), department stores (10 percent), and stores specializing in sales by mail (25 percent).

### Consumer Preferences

The type of wood species used in France for furniture changes with the fashion. Wild U.S. cherry used to be popular in France but now is more used in Denmark, Italy and Germany.

The main species used in France are listed below:

USE	TYPE OF WOOD
Children's and low budget furniture	Pine, fir, spruce
Chairs, seats and institutional furniture	Beech, ash
Bedsprings and frame/supports furniture	Poplar
Traditional furniture (antique & country)	Oak, wild cherry
High quality antique furniture	Walnut

Indoor furniture	Chestnut and maple
Modern furniture	Elm (more and more scarce)

According to the American Hardwood Association (AHEC), some leading manufacturers of French furniture have shifted from buying mainly FAS grade (firsts and seconds), to more No 1 common and even No 2. Sap is always disliked, but some other characteristics like knots have become acceptable and even fashionable. The current cherry specifications are similar to white oak specifications. Maple is mainly specified F1. white and limited quantities of red oak are required in FAS for molding or when long lengths are required. More red alder is being used, possibly because of high cherry prices. Interest is increasing in tulipwood (known locally as tulipier), and there is currently more experimenting with new hardwood species (including Chilean lenga) than ever before. Some have expressed concerns over the number of furniture companies that recently invested in plants to use fiberboard/MDF instead of solid wood.

Both furniture and non-furniture sectors need logs and lumber, which are resawn to the lumber specifications of grade, thickness and width demanded by French manufacturers. Logs are often further dried to 10-12 percent moisture content (preferred in European countries) rather than the US standard of 6-8 percent.

### **Trade**

France has a net trade deficit in furniture, with imports about one-third greater than exports. France is the third largest EU exporter of furniture (after Italy and Germany). EU countries buy 62 percent of France's exports. EU countries, Brazil and Romania are the major suppliers of furniture to France.

### **Market Development Programs in France for Wood Products**

The Fédération Nationale du Bois (FNB), a private organization of about 2,000 members (composed mainly of wood traders and sawmill operations) has export promotion activities in foreign countries such as trade missions and seminars. FNB's budget is not available.

### **FRANCE: MARKET OPPORTUNITIES FOR U.S. EXPORTERS**

Many feel that there is great potential for U.S. wood products in France. France is the 6<sup>th</sup> largest customer for U.S. temperate hardwood. However, data for the first half of 1999 show that French imports of U.S. hardwood remained stagnant. Note that the American Hardwood Export Council (AHEC) reports that consumption of American hardwood is far larger in France than the official statistics of 50,000-60,000 cubic meters per year. The French Wood Importers Federation believe the real consumption of American hardwood in France is close to 100,000 cubic meters, with many shipments coming through third countries (mostly Belgium), and some direct sales to manufacturers that may be misclassified in the Customs data.

French wood buyers purchase predominantly white oak, although its share is declining due to a competition from French white oak, while red oak and western red alder are up. Cherry is more often purchased as logs, and cherry lumber and veneer imports to France are declining. In the future, U.S. wood exporters will have to compete with French wood producers, as domestic production of precious temperate hardwood increases and the development of an increased competition from other EU countries as well as from Eastern European countries continues

Now widely known by French furniture manufacturers, American hardwood species still need to be made more

popular with French architects, interior designers and joinery manufacturers. This is the current strategy of the [American Hardwood Export Council](#) .

One opportunity for U.S. exporters in France is to supply raw materials for the manufacture of wine barrels. Oak is used to manufacture 400,000 barrels per year (about 200,000 cubic meters of logs). Specifications for the type of wood differ by regions and by the type of wine the barrel will contain.

Contact for US exporters looking for an agent/importer in France:

Mr. Eric Boilley, Director

Federation Francaise des Bois Tropicaux et Americains

6, avenue de St Mande, 75012 Paris Tel: (33) 1.44.75.58.58 Fax: (33) 1.44.75.54.00

E-mail: [ffbta-ffibn@wanadoo.fr](mailto:ffbta-ffibn@wanadoo.fr)

### French Import Regulations for Furniture and Wood Products

CTBA develops and monitors French and EU standardization programs, and analyzes European rules and regulations in cooperation with the BNBA.

## TABLES

### Softwood Logs

PSD Table						
Country	France					
Commodity	Softwood Logs			1000 CUBIC METERS		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	14600	14000	14800	14900	0	15500
Imports	120	103	120	110	0	120
TOTAL SUPPLY	14720	14103	14920	15010	0	15620
Exports	270	282	270	280	0	280
Domestic Consumption	14450	13821	14650	14730	0	15340
TOTAL DISTRIBUTION	14720	14103	14920	15010	0	15620

(Note: The French Customs classification does not distinguish between trade in logs (used for construction, saw milling, etc.) and pulpwood. Therefore, while trade matrix data are given for softwood roundwood, the PS&D import and export data are still estimates of the trade in softwood logs).

Import Trade Matrix			
Country	France		
Commodity	Softwood Logs		
Time period	Jan-Dec	Units:	CUM

Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Germany	188099	Germany	129225
Belgium/Lux	46389	Belgium/Lux	63389
Switzerland	150404	Switzerland	143427
Spain	47050	Spain	60445
Total for Others	431942		396486
Others not Listed	19102		14218
Grand Total	451044		410704

Export Trade Matrix			
Country	France		
Commodity	Softwood Logs		
Time period	Jan-dec	Units:	CUM
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Italy	210936	Italy	224307
Belgium/Lux	72827	Belgium/Lux	107184
Spain	70494	Spain	130307
Germany	54077	Germany	76115
Switzerland	39107	Switzerland	36658
Total for Others	447441		574571
Others not Listed	37715		51251
Grand Total	485156		625822

### Softwood Lumber

PSD Table						
Country	France					
Commodity	Softwood Lumber				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	7700	7200	7800	7700	0	7800
Imports	1900	2073	1900	2100	0	2100
TOTAL SUPPLY	9600	9273	9700	9800	0	9900
Exports	450	506	450	550	0	600
Domestic Consumption	9150	8767	9250	9250	0	9300
TOTAL DISTRIBUTION	9600	9273	9700	9800	0	9900

Import Trade Matrix			
Country	France		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	CUM
Imports for:	1996		1997
U.S.	17059	U.S.	12351
Others		Others	
Finland	680597	Finland	798746
Sweden	422246	Sweden	441449
Germany	328747	Germany	341620
FSU	190022	FSU	234208
Baltic States (Estonia, Latvia, Lettonia)	80055	Baltic States (Estonia, Latvia, Lettonia)	94436
Belgium/Lux	55425	Belgium/Lux	80349
Canada	30529	Canada	33101
Norway	16239	Norway	14782
Austria	9224	Austria	4380
Poland	4200	Poland	8668
Total for Others	1817284		2051739
Others not Listed	68669		78863
Grand Total	1903012		2142953

Export Trade Matrix			
Country	France		
Commodity	Softwood Lumber		
Time period	Jan-dec	Units:	CUM
Exports for:	1997		1998

U.S.		U.S.	
Others		Others	
Belgium/Lux	119954	Belgium/Lux	103708
Spain	68444	Spain	105199
Italy	46109	Italy	66721
Germany	28892	Germany	25943
Netherlands	8282	Netherlands	5589
Total for Others	271681		307160
Others not Listed			89162
Grand Total	271681		396322

### Tropical Hardwood Logs

PSD Table						
Country	France					
Commodity	Tropical Hardwood Logs				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	0	0	0	0	0	0
Imports	700	886	850	820	0	820
TOTAL SUPPLY	700	886	850	820	0	820
Exports	5	31	11	40	0	40
Domestic Consumption	695	855	839	780	0	780
TOTAL DISTRIBUTION	700	886	850	820	0	820

Import Trade Matrix			
Country	France		
Commodity	Tropical Hardwood Logs		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
		Cameroon	208889
		Gabon	146817

		Liberia	61083
		Congo-Brazzaville	16112
		Republic of CenterAfrica	11346
		Myanmar	1548
Total for Others	0		445795
Others not Listed			49996
Grand Total	0		495791

### Tropical Hardwood Lumber

PSD Table						
Country	France					
Commodity	Tropical Hardwood Lumber				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	280	255	280	255	0	260
Imports	270	247	270	250	0	255
TOTAL SUPPLY	550	502	550	505	0	515
Exports	15	13	15	12	0	13
Domestic Consumption	535	489	535	493	0	502
TOTAL DISTRIBUTION	550	502	550	505	0	515

Import Trade Matrix			
Country	France		
Commodity	Tropical Hardwood Lumber		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Brazil	155349	Brazil	135494
Ghana	44468	Malaysia	59997
Malaysia	42951	Ghana	39109
Cote d'Ivoire	41618	Cote d'Ivoire	39109
Cameroon	33935	Cameroon	36176
Congo	11066	Congo	15755

Myanmar	10949	Myanmar	8886
Total for Others	340336		334526
Others not Listed	118368		47851
Grand Total	458704		382377

### Temperate Hardwood Logs

PSD Table						
Country	France					
Commodity	Temperate Hardwood Logs				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	8000	7913	8100	8240	0	8380
Imports	300	344	300	350	0	350
TOTAL SUPPLY	8300	8257	8400	8590	0	8730
Exports	1089	1126	1089	1120	0	1120
Domestic Consumption	7211	7131	7311	7470	0	7610
TOTAL DISTRIBUTION	8300	8257	8400	8590	0	8730

The two trade matrices below includes roundwood for pulp and therefore overestimates the real trade in temperate hardwood logs for lumbering and milling. French oak logs exports in CY 1997 are estimated at 240,224 MT of which 229,713 MT were sold to EU countries.

Import Trade Matrix			
Country	France		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.	23163	U.S.	35350
Others		Others	
Spain	251824	Spain	236785
Germany	180771	Germany	171501
Belgium/Lux	113138	Belgium/Lux	151609
Canada	43089	Canada	14168
Italy	1024	Italy	8215
United Kingdom	1442	United Kingdom	1358

Total for Others	591288		583636
Others not Listed	26097		52427
Grand Total	640548		671413

Export Trade Matrix			
Country	France		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	CUM
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Belgium/Lux	820196		803283
Germany	330595		220692
Italy	950524		323880
Spain	333843		324646
Total for Others	2435158		1672501
Others not Listed	415576		374519
Grand Total	2850734		2047020

**Temperate Hardwood Lumber**

PSD Table						
Country	France					
Commodity	Temperate Hardwood Lumber			1000 CUBIC METERS		
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	2620	2495	2720	2595	0	2640
Imports	260	282	260	310	0	320
TOTAL SUPPLY	2880	2777	2980	2905	0	2960
Exports	520	520	535	548	0	570

Domestic Consumption	2360	2257	2445	2357	0	2390
TOTAL DISTRIBUTION	2880	2777	2980	2905	0	2960

(Note: Discrepancies between the PS&D and trade matrices is mainly due to the fact that different products including TPB are listed as TPB trade in customs data while some THL trade is listed under other categories. It can also explained by the fact that Post has used an average conversion coefficient to convert MT into CUM.)

Import Trade Matrix			
Country	France		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.	52681	U.S.	61467
Others		Others	
Belgium/Lux	18787	Belgium/Lux	21850
Canada	17599	Canada	19980
Germany	13683	Germany	23433
Spain	3406	Spain	3675
Italy	2099	Italy	4962
Total for Others	55574		73900
Others not Listed	39100		86554
Grand Total	147355		221921

Export Trade Matrix			
Country	France		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	CUM
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Belgium/Lux	105458	Belgium/Lux	101529
Germany	59010	Germany	55709
Italy	30766	Italy	24790
Spain	92282	Spain	95920

Morocco	33096	Morocco	14015
Netherlands	48759	Hongkong	22886
Hongkong	20373	Netherlands	47288
Total for Others	389744		362137
Others not Listed	80984		79530
Grand Total	470728		441667

### Total Plywood

The PS&D and trade matrices below pertain to total plywood production and trade. No specific data were available for softwood and hardwood plywood production and trade.

PSD Table						
Country	France					
Commodity	Hardwood Plywood				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	500	472	500	460	0	480
Imports	350	380	350	390	0	400
TOTAL SUPPLY	850	852	850	850	0	880
Exports	600	260	600	270	0	290
Domestic Consumption	250	592	250	580	0	590
TOTAL DISTRIBUTION	850	852	850	850	0	880

Import Trade Matrix			
Country	France		
Commodity	Hardwood Plywood		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.	24359	U.S.	19030
Others		Others	
Indonesia	84445	Indonesia	97467
Finland	61912	Finland	58076
FSU	28755	FSU	16594
Brazil	27935	Brazil	23722
Germany	23562	Germany	26534
Belgium/Lux	17810	Belgium/Lux	25718

Total for Others	244419		248111
Others not Listed	95795		113332
Grand Total	364573		380473

Export Trade Matrix			
Country	France		
Commodity	Hardwood Plywood		
Time period	Jan-Dec	Units:	CUM
Exports for:	1997		1998
U.S.		U.S.	
Others		Others	
Germany	84026	Germany	77394
Netherlands	72387	Netherlands	71855
Italy	35573	Italy	38656
Spain	21398	Spain	23068
Switzerland	13204	Switzerland	11973
United Kingdom	10518	United Kingdom	12362
Belgium/Lux	11454	Belgium/Lux	11855
Total for Others	248560		247163
Others not Listed	13879		13029
Grand Total	262439		260192

### Harwood veneer

Data for hardwood veneer should be regarded cautiously as it seems that many veneer producers, importers and exporters either are too small to be polled by the Ministry of Industry (thus are not included in official statistics) or mix their veneer data with other wood products data when they send their data to the Ministry. Moreover, conversion factors from MT to cubic meters and from square meters to cubic meters vary from one source to another. Post has chosen to use the following conversion factors

From MT to cubic meters : 3.2

From square meters to cubic meters: 1.6

Also note that, when calculated in value and not in volume, there are fewer differences between production and trade

figures. Such discrepancies must be caused by biased conversion factors (see table below).

1998 hardwood veneer figures (in million USD, conversion factor: one USD for 5.90 FF)

Production:	111.9
Imports:	91.9
Exports:	114.2
Consumption:	89.6

(Source SESSI, CTBA)

Due to the huge discrepancies in production and trade figures, it is difficult to assess properly the hardwood veneer sector. However, some trends show a surge in imports, exports and consumption, driven by the recent growth in the furniture sector. Such growth is forecast to continue through 1999 and into 2000.

PSD Table						
Country	France					
Commodity	Hardwood Veneer				1000 CUBIC METERS	
	Revised	1998	Preliminary	1999	Forecast	2000
	Old	New	Old	New	Old	New
Market Year Begin		01/1998		01/1999		01/2000
Production	159000	159000	165000	165000	0	168000
Imports	15000	15000	16000	16000	0	16500
TOTAL SUPPLY	174000	174000	181000	181000	0	184500
Exports	5000	5000	7000	7000	0	8000
Domestic Consumption	169000	169000	174000	174000	0	176500
TOTAL DISTRIBUTION	174000	174000	181000	181000	0	184500

Import Trade Matrix			
Country	France		
Commodity	Hardwood Veneer		
Time period	Jan-Dec	Units:	CUM
Imports for:	1997		1998
U.S.		U.S.	
Others		Others	
Portugal	48339	Portugal	44490
Finland	46540	Finland	54147
Congo	25462	Congo	16157
Spain	24294	Spain	25603

Germany	14515	Germany	15366
Cote d'Ivoire	11187	Cote d'Ivoire	9344
Belgium/Lux	10912	Belgium/Lux	13200
Total for Others	181249		178307
Others not Listed	53592		62790
Grand Total	234841		241097

Export Trade Matrix			
Country	France		
Commodity	Hardwood Veneer		
Time period	Jan-Dec	Units:	CUM
Exports for:	1997		1998
U.S.	1491	U.S.	1213
Others		Others	
Italy	67136	Italy	81462
Germany	24874	Germany	26269
Spain	12182	Spain	7814
Belgium/Lux	10278	Belgium/Lux	10905
United Kingdom	3722	United Kingdom	4534
Portugal	3565	Portugal	2774
Austria	3008	Austria	2678
Denmark	2442	Denmark	6874
Switzerland	960	Switzerland	1053
Croatia	787	Croatia	826
Total for Others	128954		145189
Others not Listed	18009		18888
Grand Total	148454		165290

## Particle Board

Production of particle board increased by 15 percent in 1998, driven by increased exports (up 2 percent) and booming consumption. Belgium remains France's largest supplier while Germany remained its largest customer. Nota that an unaccounted part of imports from Belgium are in fact imports from non EU countries (including the United States) which are unloaded and Customs-cleared at the port of Antwerp. Expectations for 1999 and 2000 are for continuing growth in production and exports due to a surge in domestic consumption driven by the recent economic rebound and the growth in the building and furniture sectors in France

## Particle board (including OSB) PS&D table and trade matrices

Year	1998	1999	2000	Units
Production	2,003	2,100	2,150	'000 Cubic Meters
Imports	647	700	750	'000 Cubic Meters
Total Supply	2,650	2,800	2,900	'000 Cubic Meters
Export	1,082	1,200	1,250	'000 Cubic Meters
Dom. Consumption	1,568	1,600	1,650	'000 Cubic Meters
Total Uses	2,650	2,800	2,900	'000 Cubic Meters

OSB/Particle board exports 98	Units: MT
country	
USA	
Others countries:	
Belgium	60758
Netherlands	41681
Germany	177581
UK	95425
Spain	160638
Swiss	48997
Total of others countries	585080
Others not listed	91431
Total	676511

OSB/Particle board imports 98	Units: MT
country	
USA	
Others countries	
Belgium	201883
Germany	130232
Sweden	6220
Austria	22699
Switzerland	23446
Spain	109677
Total of others countries	377157
Others not listed	48621

Total	425778
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