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Poland

Solid Wood Products

Annual Report

2000

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Report Highlights:
After a decline in trade in late 1998 and early 1999 reflecting the Russian crisis, the Polish furniture manufacturing industry recovered at the end of 1999. Expected growth of production and trade in the furniture industry in 2000 could lead to imports of U.S. hardwoods.

Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Warsaw [PL1], PL

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EXECUTIVE SUMMARY

Furniture sales experienced a downturn following the Russian crisis in 1998 resulting in a build up of furniture inventories and reduction in furniture manufacturing. However, the wood products industry remains one of the fastest growing sectors in Poland driven largely by furniture manufacturing which recovered to pre-Russian crisis levels by the end of 1999. Roughly $ 1.6 billion worth of furniture sales were registered during the first eleven months of 1999 in Poland (compared to $ 1.7 in a similar period of 1998). While furniture sales to Russia remain depressed, Polish exporters have expanded their sales to the EU and other markets.

Imports of U.S. solid wood products were $5.4 million in 1999 (Jan.-Nov.). There is still growing demand for high-quality wood, particularly hardwood. In comparison to other suppliers of wood products, U.S. imports are at a disadvantage due to higher import tariffs (anywhere from 3 - 12 percent), while tariffs on products from less developed countries, Central and Eastern Europe and EU countries are zero.

PRODUCTION

Poland has 8.8 million hectares of forest covering 28 percent of the country. The government controls over 80 percent of the forests and supplies 99 percent of the roundwood used by the Polish wood products industry. In 1998 Poland harvested 24.9 million cubic meters of wood, including 16.9 million cubic meters of softwood and 6.3 million cubic meters of hardwood.

In 1997, the State Treasury approved a reprivatisation law under which 170,000 land ownership claims have been registered. Two bills drafted at the beginning of 1999 which would have compensated individuals for real estate and other claims which occurred under communist government were rejected by the Parliament.

Projects have been established to enlarge forest area in the next few years by afforesting around 300,000 hectares of former State farms taken over by the Directorate of State Forests. The structure of Polish forests is still dominated by coniferous varieties, particularly Scotch Pine and Spruce (around 80 percent of the stand). Almost 50 percent of the forests are young stand and forest cultivations, only 17 percent of the stand can be cut. Around 40 percent of Polish forests are damaged; half of which is completely or partially defoliated. Insects, particularly nun moth, air pollution, fire, floods and wildlife were the main cause of damage.

The afforestation process is limited by the budget that has been allocated for the task. In 1998, $15 million was spent on afforestation, $25 million was spent on removal of forest material from the 1997 flood, $14 million was spent on fire prevention and $100 million was spent on cultivation, nursery work and seed production.

A proposal to privatize the Directorate of State Forests is under consideration. The Directorate of State Forests controls the timber removal in all forests, as well as prices of timber and wood. In 1998 a tender system was introduced which the sawmill representatives have criticized because of the lack of transparency in the process in minimum prices set by the Directory.

There are many small sawmills which do not pay VAT tax (according to the existing fiscal law, there is no obligation to pay VAT tax from the annual turnover lower than PLN 80,000 ($20,000). When they reach this limit they close their activity and start a new one. This way they represent a big competition to the big sawmills whose production is more expensive. Big sawmills plan to consolidate their efforts by organizing a consortium which would negotiate wood prices with the Directorate of State Forest in the future and help the sector to recover.

Solid Wood Products Situation/Outlook

The sawing industry is the primary consumer of all raw wood products. The productivity in this industry in Poland is comparable to Western Europe. However, in comparison with the Western European industry, the Polish sawing industry is very labor intensive. Sawmill capacity is substantially larger than production. However, mill use is limited by local prices and access to imports (seasonal tariffs make it prohibitive to import logs between Spring and Fall).

Poland produces sawn wood (hard and soft), wood panels (fiberboard and particle board) as well as construction materials, including windows, door frames and floring. For the last few years, domestic demand has grown along with the rest of the economy. In particular, fiberboard and particle board are in great demand on the local market. Some production is exported, but boards and panels are also imported. Around 90 percent of all imported panels and boards are used by the construction and furniture industries.

The 1998 production of plywood was 133.7 thousand CUM (40 percent from softwood and 60 percent from hardwood). During the first 11 months of 1999, the production of plywood was 117 thousand CUM. Based on partial year figures, it is estimated that the 1999 production will be similar to 1998 or slightly lower. The wooden panel industry is using raw wood material directly from the forest as well as rejected industrial wood. The Polish wooden pallet industry uses almost 25 percent of raw wood material for industrial processing. There has been a systematic decrease in wood consumption by all wood processing sectors, mainly due to increasing prices of raw and primarily processed wood.

TRADE

Overview/Outlook

There is extremely strong demand for Polish exports of wood furniture in the European Union. The Russian crisis dampened Polish exports of furniture in 1998. As a result, furniture stocks increased at the end of 1998 and the beginning of 1999. According to the Main Statistical Office, 96 percent of wood products were exported to Western Europe in 1999, primarily furiniture.

There is strong demand in Poland for wooden industrial pallets (Euro-pallets). Experts suggest around 800,000 - 1 million wooden pallets could be used every month. Polish exports of sawn wood in 1998 represented 557.8 thousand CUM, which was 15 percent of total rough wood production. 159 thousand CUM of sawn wood was imported into Poland (mainly from the Central and Eastern European and EU countries).

Market Development Strategies

Temperate hardwood lumber and logs: U.S. hard wood exporters are in position to take advantage of the expansion and expected continued success of Poland's furniture manufacturing industry. In addition to sawn lumber and veneers, U.S. oak logs also are purchased by Polish importers. Following resolution of a phytosanitary concerns held by the Polish Plant Quarantine office which precluded imports of U.S. oak logs, the first import of U.S. oak logs was observed in 1997. Sales of U.S. hardwood logs continued to grow in 1998 to a record value of $643,000 according to the U.S. Census. Continuing strong demand from Western Europe, as well as from a local market, for Polish furniture make hardwood logs, lumber and veneer the best market prospects for U.S. exporters considering entry in the Polish wood market.

MARKET SEGMENT ANALYSIS

Construction Sector

The Polish construction sector constitutes approximately 6 percent of national GDP. Supported by government subsidies during communist times, this sector went into recession during the transition period in the early 1990s. Investment outlays in buildings and other facilities in Poland have been growing steadily since 1993.

Office building construction is expected to rise from $850 mln in 1999 up to $980 mln in 2000 and $2 bln before 2010. Warsaw, where 65 percent of investment is located, is currently the center of office building construction. Construction in other cities such as Katowice, Poznan, Krakow, Gdansk, Gdynia and Lodz will become more active as Poland's economy continues to grow.

It is estimated that retail construction sector will increase from $670 mln up to $ 800 mln in 2000 and $1.8 bln by 2010. Since 1996, construction of modern supermarkets has been one of the most vibrant and one which exemplifies the changes which are taking place in Poland There is also an increasing trend in construction of shoping centers. Another area of dynamic development are gas stations, resulted from a growing numbers of cars in Poland.

Plans for the development of hotel and tourist facilities are also impressive. In 1997, Poland ranked thirteenth in the world for income from tourism. But compared to Western Europe, the Polish hotel industry is still quite underdeveloped. According to the Institute of Tourism, approximately 170 new hotels will be built in Poland by the year 2005. There are also plans to renovate existing hotels.

Germany is the primary supplier of construction materials to Poland and it could be difficult for the American companies to be competitive for wood products due to tariff differentials. EU wood products are duty free, while 3 or 9 percent import duty is applied to American imports.

According to an analysis of the construction sector made by the Main Statistical Office covering the first 11 months of 1999, the results of construction industry in fixed prices were higher by 2.9 percent compared to the similar period in 1998. During Jan.-Nov. 1999, 58,542 apartments were finished; 12.8 percent less than in the same period of 1998. There were 1219 new dwellings finished in Jan-Oct 1999 of which 187 were constructed with wood frames within, on average, 12.6 months. The average construction time for all buildings finished in 1999 was 21.6 months and was slightly shorter compared to the previous year, due in some extent to light winter time. During Jan-Nov of 1999 the construction of 113,408 apartments was started, which was 29.2 percent more than in the similar period of 1998, mainly in individual construction.

Furniture & Interiors Sector

Furniture production has grown rapidly over the past few years. Exports of furniture in 1998 were dampened by the financial crisis in Russia. However, Polish furniture exporters appear to have successfully refocused on the EU market. As a result, production in the furniture sector is up over 40 percent (Dec. 99 vs. Dec. 98) and furniture output is back up to pre-1998 levels. Production and exports in 1999 are forecast to be at 1997 levels with around 2.2 million furniture sets produced. Driven by the strong performance of the furniture manufacturing sector, demand for imported hardwood timber of high quality, like beech, maple and tropical wood is still growing.

Use of fiberboard and particle board in the furniture industry is also growing. There are four large producers of particleboard, two of fiberboard and one of plywood in Poland. Some production is exported, but boards and panels are also imported in amounts increasing every year.

The structure of production of wood panels and boards in Poland is similar to the average European standard: particle board represents 70 percent of all ligneous boards, fibreboard represents 25 percent, and laminated panels and plywood - 5 percent. Around 90 percent of all panels and boards is supplied to the construction and furniture industries, with a majority used for furniture production.

Production of MDF boards is growing very quickly. In 1994 MDF represented only 1 percent of all fiberboard production while in 1997, MDF represented 10 percent. Fifty percent of all fibreboards are of the “refined” type. The majority of “refined” fiberboard production is used by the furniture industry. Introduction of new kinds of panels and boards and enlargement of their use has become one of the more profitable areas within the wood products sector.

Material Handling Industry

There are 1200-1500 wooden pallet manufacturers in Poland. They produce around 1 million pallets a month and most of this production is exported mainly to Germany and other EU countries. Since 1997, the EU introduced an anti-dumping duty on Polish pallets. Most of the exporters are members of EURO pallets Producers Association which negotiated 4 percent tariff on products delivered by its members.

STATISTICAL INFORMATION

Strategic Indicator Tables

A. Construction Sector

STRATEGIC INDICATOR TABLE: CONSTRUCTION MARKET			
	1998	1999	2000
Country: Poland	Previous	Current	Following
Report Year:	CY	CY	CY
Total Housing Starts (number of units)	90100	113408	120000
--Of which, wood frame	1500	500	650
--Of which, steel, masonry, other materials	88600	112908	119350
--Of total starts, residential	90000	113109	119500
----Of residential, single family	54300	76609	82000
----Of residential, multi-family	35700	36500	37500
--Of total starts, commercial	100	299	500
Total Value of Commercial Construction Market ($US million)	9000	9000	9000
Total Value of Repair and Remodeling Market ($US million)	3500	3900	4500
Are tariffs on softwood from the United States higher, equal or lower than softwood imported from other countries? 1/	higher	higher	higher
Are tariffs on plywood from the United States higher, equal or lower than plywood imported from other countries? 1/	higher	higher	higher
Are non-tariff barriers on softwood from the United States higher, equal or lower than softwood imported from other countries? 1/	equal	equal	equal
Are non-tariff barriers on plywood from the United States higher, equal or lower than plywood imported from other countries? 1/	equal	equal	equal
Are there market development programs for construction, softwood or plywood imports funded by foreign governments?	no	no	no
If yes, identify the following:			
--Country(ies)			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/			
--Estimated annual market expansion outlay ($US million) by country			
Is the acceptability of U.S. style timber frame construction (i.e., per building codes, mortgage availability, etc.) high, medium or low? 3/	medium	medium	medium
Are consumer preferences for solid wood materials vis-a-vis non-wood materials in construction high, medium or low? 3/	high	medium	medium
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 3/	high	high	high
If price quotes for construction and structural wood products are available, identify the leading source(s)			

1/ Under trade agreements, Poland has a zero tariff on wood and articles thereof imported from the EU, EFTA, Czech and Slovak Republics, Hungary, Slovenia, Roumania, Bulgaria, Lithuania, Latvia, Estonia, Israel, Farrow Islands and Turkey.

2/ The North American wood frame housing construction style is generally acceptable. However, it has met with only limited popularity because the quality of local construction wood is not very high. Often the quality of local wood housing construction material suffers due to insufficient drying. High-quality, kiln dried wood must often be imported which adds to the cost of wood frame house construction compared to traditional brick or concrete slab houses. Additionally, mortgages are only available from a few banks with terms that are generally not affordable for an average Polish family. In 1997, when several neighborhoods in wood frames were constructed and sold, the constructors were very optimistic that this trend would be kept within following years. In fact, the construction of 500- 600 houses a year is more realistic. Despite the problems, there is an increasing interest in wood frame construction in Poland. The Polish Home Builders Association estimates there will be a steady increase of about 25-30 percent in this form of housing in the future.

B. Furniture & Interiors Sector

STRATEGIC INDICATOR TABLE: FURNITURE & INTERIORS MARKET			
	1998	1999	2000
Country: Poland	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	90100	113408	120000
Total Number of Households (thousand)	12620	12720	12800
Furniture Production ($US million)	1880	1900	2100
Interiors Market Size ($US million)	400	500	600
Total Furniture Imports ($US million)	336	340	400
Total Furniture Exports ($US million)	1910	2000	2500
Are tariffs on hardwood from the United States higher, equal or lower than hardwood imported from other countries? 1/	higher	higher	higher
Are non-tariff barriers on hardwood from the United States higher, equal or lower than hardwood imported from other countries? 1/	equal	equal	equal
Are there market development programs for furniture or interiors market expansion funded by foreign governments?	no	no	no
If yes, identify the following:			
--Country(ies) 2/			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 3/			
--Estimated annual market expansion outlay ($US million) by country			
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 4/	high	high	medium
If price quotes for furniture and interiors products are available, identify the leading source(s)			

1/ The tariffs on hardwood imported from the U.S. and former Soviet republics are the same, while the EU products, according to the EU accession agreement, are duty free.

The value of furniture production has risen in 1999 compared to 1998 results but the volume was lower by 10 percent. This was a result of a 1998/99 decrease in exports to Russia and former soviet republics.

C. Material Handling Sector

STRATEGIC INDICATOR TABLE: MATERIAL HANDLING MARKET			
	1998	1999	2000
Country: Poland	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Value of Industrial Output ($US million)	400	450	450
New Pallet Production (million units)	30	35	35
Are consumer preferences for solid wood pallets and packaging materials vis-a-vis non-wood materials high, medium or low? 1/	high	high	high
Are industry/trade preferences for repaired/recycled pallets over new pallets low, medium or high? 1/	low	low	low
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high? 1/	n.a.	n.a.	n.a.
Identify leading source(s) of price quotes:			
Are there market development programs for the materials handling market expansion funded by foreign governments?	n.a.	n.a.	n.a.
If yes, identify the following:			
--Which Countries?			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other. 2/			
--Estimated annual market expansion outlay ($US million) by country			
1/ If low or medium, explain in text of report.			
2/ If "other", explain in text of report.			

1/ As there is no pallet recycling industry in Poland, there is no choice or preference for new or second-hand pallets.

D. Tariffs and Taxes

STRATEGIC INDICATOR TABLE: FOREST PRODUCT TARIFFS AND TAXES (percent)						
		2000	2001			
		Tariff	Tariff	Other		
Country: Poland	Product	Current	Following	Import	Total Cost	Export
Report Year: 1998	Description 1/	Year	Year	Taxes/Fees	of Import	Tax
				VAT		
4401.2	Wood Chips	3	3	0	3%	none
4403	Logs	3	3	7/22	10% - 25%	none
4404	Hoopwood; split poles; piles, pickets and stakes of wood	9	9	7/22	16% - 31%	none
4405	Wooden wool, wooden meal	9	9	7/22	16% - 31%	none
4406	Railway Ties and Sleepers	9	9	7/22	16% - 31%	none
4407	Wood, sawn	9	9	22	31 %	none
4408	Veneer Sheet	9	9	22	31 %	none
4409	Moldings Wood, Dowels, etc.	9	9	22	31 %	none
4410	Particle Board/Oriented Strand Bd.	9	9	22	31 %	none
4411	Fiberboard	9	9	22	31 %	none
4412	Plywood and Veneered Panels	9	9	22	31 %	none
4413	Densified Wood	9	9	22	31 %	none
4414	Wooden Frames	9	9	22	31 %	none
4415	Pallets, Packing Cases, and Boxes	9	9	22	31 %	none
4416	Wooden Containers	9	9	22	31 %	none
4417	Wooden instruments and handles	9	9	22	31 %	none
4418	Builders' Joinery	9	9	7/22	16% - 31%	none
4419	Kitchen ustensils in wood	9	9	22	31 %	none
4420	Wood marquetry and inlaid wood	9	9	22	31 %	none
4421	Other articles on wood	9	9	22	31 %	none
0.07836083333333	Wooden furniture	12	12	22	34 %	none
9406.00.10	Pre-fabricated Houses	6	6	22	28 %	none

The product value plus FOB costs of transport create the value for VAT tax calculation.

F. Forest Area

STRATEGIC INDICATOR TABLE: FOREST AREA (million hectares/million cum)			
	1998	1999	2000
Country: Poland	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Land Area	31.3	31.3	31.3
Total Forest Area	8.8	8.9	9
--of which, Commercial	5.4	5.5	5.6
----of commercial, tropical hardwood	0	0	0
----of commercial, temperate hardwood	2	2	2
----of commercial, softwood	5.2	5.3	5.4
--of forest area, non-commercial	3.4	3.4	3.4
Forest Type			
--Of which, virgin	0.1	0.1	0.1
--Of which, plantation	0.004	0.004	0.004
--Of which, other commercial (regrowth)	0.06	0.06	0.06
Forest Ownership			
--Nationally owned and no commercial access	3.3	3.3	3.3
--Nationally owned, commercial logging permitted	5.3	5.3	5.3
--Other publicly owned land, no commercial access	0.1	0.1	0.1
--Other publicly owned, logging permitted	0.1	0.1	0.1
--privately owned commercial forest	1.5	1.5	1.5
Total Volume of Standing Timber	1,607	1,607	1,607
--Of which, Commercial Timber	1,402	1,402	1,402
Annual Timber Removal 1/	24.9	24.9	25
Annual Timber Growth Rate	31	31	31
Annual Allowable Cut	25	25	25
1/ If Removals exceeds growth rate, analyze impact in text.			

PS&D Tables and Trade Matrices

Temperate Hardwood Lumber

PSD Table						
Country	Poland					
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	600	582.5	600	600	0	600
Imports	100	77.6	120	80	0	90
TOTAL SUPPLY	700	660.1	720	680	0	690
Exports	150	100.5	170	100	0	110
Domestic Consumption	550	559.6	550	580	0	580
TOTAL DISTRIBUTION	700	660.1	720	680	0	690

Import Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	1000 cum
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Belarus	25	Sweden	14
Germany	23	Belarus	11
Lithuania	7	Germany	7
Ukraine	6	Yugoslavia	6
Bosnia&Hercegovina	2	Ukraine	4
Russia	1	Lithuania	3
		Slovakia	2
Total for Others	64		47
Others not Listed	13.6		18
Grand Total	77.6		65

Export Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	1000 cum
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Italy	45	Germany	24
Germany	10	Italy	10
Czech Rep.	7	Switzerland	5
Austria	5	Austria	4
Denmark	3	Denmark	3
Norway	2.5	Sweden	2
Switzerland	2		
Sweden	1		
Total for Others	75.5		48
Others not Listed	25		25
Grand Total	100.5		73

Temperate Hardwood Logs

PSD Table						
Country	Poland					
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	5400	5400	5400	5400	0	5400
Imports	270	485	300	600	0	600
TOTAL SUPPLY	5670	5885	5700	6000	0	6000
Exports	310	652	300	600	0	540
Domestic Consumption	5360	5233	5400	5400	0	5460
TOTAL DISTRIBUTION	5670	5885	5700	6000	0	6000

Import Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	1000 CUM
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Belarus	183	Sweden	143
Germany	126	Belarus	113
Lithuania	70	Germany	68
Ukraine	54	Yougoslavia	56
Bosnia &Herc.	24	Ukraine	36
Slovakia	2	Lithuania	31
		Croatia	18
		Slovakia	15
		Russia	1
Total for Others	459		481
Others not Listed	26		22
Grand Total	485		503

Export Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	1000 CUM
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Italy	271	Germany	136
Germany	74	Italy	79
Czech Rep.	73	Switzerland	20
Austria	51	Austria	18
Denmark	27	Denmark	18
Norway	25	Sweden	13
Switzerland	18	Czech Rep.	2
Sweden	12		
Total for Others	551		286
Others not Listed	101		37
Grand Total	652		323

Softwood Lumber

PSD Table						
Country	Poland					
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	3200	3076	3500	3100	0	3200
Imports	80	81	100	90	0	100
TOTAL SUPPLY	3280	3157	3600	3190	0	3300
Exports	500	458	700	500	0	600
Domestic Consumption	2780	2699	2900	2690	0	2700
TOTAL DISTRIBUTION	3280	3157	3600	3190	0	3300

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	1000 CUM
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	14	Germany	11
Sweden	11	Sweden	8
Lithuania	10	Lithuania	4
Latvia	1	Russia	4
Netherlands	1	Netherlands	3
Russia	1	Belarus	2
		Finland	1
Total for Others	38		33
Others not Listed	43		24
Grand Total	81		57

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	1000 CUM
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Germany	120	Germany	160
Belgium	72	Belgium	80
Netherlands	56	Netherlands	75
France	22	Denmark	25
Denmark	15	Spain	14
Spain	10	Italy	9
Italy	6	France	7
Total for Others	301		370
Others not Listed	157		50
Grand Total	458		420

Softwood Logs

PSD Table						
Country	Poland					
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	15100	15100	15100	15100	0	15300
Imports	400	146	450	400	0	400
TOTAL SUPPLY	15500	15246	15550	15500	0	15700
Exports	500	476	500	400	0	600
Domestic Consumption	15000	14770	15050	15100	0	15100
TOTAL DISTRIBUTION	15500	15246	15550	15500	0	15700

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Logs		
Time period	Jan-Dec	Units:	1000 CUM
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Lithuania	124	Lithuania	112
Germany	9	Belarus	30
Russia	8	Russia	27
Bielorus	3	Estonia	26
		Sweden	0.3
Total for Others	144		195.3
Others not Listed	2		46.7
Grand Total	146		242

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Logs		
Time period	Jan-Dec	Units:	
Exports for:	1998		1999
U.S.		U.S.	
Others		Others	
Austria	188	Czech Rep.	84
Germany	128	Austria	79
Denmark	97	Italy	34
Czech Rep.	37	Germany	12
Italy	16		
Total for Others	466		209
Others not Listed	10		4
Grand Total	476		**213**

Softwood Plywood

PSD Table						
Country	Poland					
Commodity	Softwood 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	50	70	50	80	0	80
Imports	20	84	30	50	0	70
TOTAL SUPPLY	70	154	80	130	0	150
Exports	25	120	30	50	0	100
Domestic Consumption	45	34	50	80	0	50
TOTAL DISTRIBUTION	70	154	80	130	0	150

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	1000CUM
Imports for:	1998		1999
U.S.		U.S.	
Others		Others	
Indonesia	75	Germany	6
Germany	2	Finland	2
Finland	2	Russia	2
Total for Others	79		10
Others not Listed	5		2
Grand Total	84		12

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	1000 CUM
Exports for:	1998		1999
U.S.	57	U.S.	2
Others		Others	
Germany	89	Germany	117
Norway	81	Denmark	39
Sweden	25	Sweden	6
		Norway	3
Total for Others	195		165
Others not Listed	19		26
Grand Total	271		193

All trade data for 1999 refer to first three quarters of the year. Source of information - The Polish Main Statistical Office, Quarterly Bulletin I-III quarters of 1999, Production in I-III quarters of 1999.