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## Poland

## Solid Wood Products

## Annual

## 2001

Approved by:

**Jim Higgiston**

**U.S. Embassy, Warsaw**

Prepared by:

N. Koniuszewska, Agricultural Specialist

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**Report Highlights:** Polish exports of softwood lumber increased by almost 50 percent in 2000 with Germany being the largest market. Polish furniture exports increased to \$1.6 billion during the first three quarters of 2000. Poland imports lumber and logs as well as construction materials. Demand for housing and construction materials have increased.

U.S. exports to Poland of solid wood products (mainly sawn wood, veneer sheets, fibreboard, joinery and carpentry) decreased slightly during 2000.

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Includes PSD changes: Yes  
Includes Trade Matrix: Yes  
Annual Report  
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## EXECUTIVE SUMMARY

Poland is one of the leading producers and exporters of furniture in Central Europe. Domestic furniture sales improved to \$1.85 billion during the first eleven months of 2000 compared with \$1.6 billion during the same period in 1999. Polish furniture exports were \$1.6 billion during the first three quarters of 2000, a slight increase. Demand for housing has grown during the past several years in Poland as the economy has expanded and incomes have risen. Along with this growth, demand for panels and boards for construction has also increased.

Poland exports both lumber and logs primarily to the European Union and Central Europe. Exports of softwood lumber increased by almost 50 percent in 2000 with Germany being the largest market. Poland imports both lumber and logs as well as construction materials. Around 90 percent of all imported panels and boards, for example, are used by the construction and furniture industries.

U.S. exports of solid wood products to Poland (mainly sawn wood, veneer sheets and sheets for plywood, fibreboard, builders joinery and carpentry) decreased slightly during 2000 (approximately \$5 million during the first three quarters of 2000 compared with \$5.4 million during the same period in 1999).

## PRODUCTION

Poland has 8.85 million hectares of forest covering 28.3 percent of the country. The government owns over 80 percent of the forests and supplies 99 percent of the round wood used by the Polish wood products industry. In 1999 Poland cut 24.2 million cubic meters of wood, including 17.6 million cubic meters of softwood and 6.6 million cubic meters of hardwood.

Polish forests are dominated by coniferous varieties including Scotch Pine (68.4 percent of forests), Spruce (5.9 percent) and Fir (2.5 percent). However, there has been an increase in broad-leaf varieties which accounted for 23.2 percent of total forest area in 1999, of which Oak represented 6.2 percent, Beech - 4.6 percent, Birch - 6.1 percent. Almost 50 percent of Polish forests are considered young stand and only 17 percent of the stand can be cut annually. Air pollution, insects and fungi pose the primary threats to Polish forests. The most heavily damaged forests are in the southern part of Poland where sulphur emissions are the highest. The percentage of damaged forests decreased from 34.4 percent in 1998 to 30.4 percent in 1999. Moreover, according to some calculations, extreme weather conditions between November 1999 and April 2000 destroyed 3.8 million cubic meters of timber.

The Directorate of State Forests, which is a part of the Ministry of Environment, controls timber removal in all forests. Since 1998, the Directorate has auctioned timber from State forests. Sawmill representatives have been critical of the system, primarily because of the minimum prices set by the Directorate. A proposal to privatize the Directorate was rejected by the Parliament in 2000.

In 1995 the Polish government passed the "Law for the Afforestation of the Country" which requires that forested area be increased by almost 700,000 hectares by 2020 and an additional 33 percent by 2050. Between 1995-2000, approximately 107 thousand hectares was afforested. In 1999, the total budget for the project was \$16.8 million. The Ministry of Environment (\$13 million), the Directorate of State Forests (\$ 770 thousand), local administrations (\$ 0.5 million), the National Fund for Environmental Protection and Water Economy (\$1.2

million) financed the project. Funds were also made available by the World Bank and the European Bank for Reconstruction and Development. Approximately 19.0 thousand hectares was afforested in 2000 with \$15 - \$16 million spent on the project. The Directorate of State Forests and the Board of Polish National Parks administer 64 percent of afforested land. Private owners and local authorities are responsible for the remaining area. Afforestation of private land was partially funded by the government through loans and grants.

State forests are still the main source of wood for Polish timber companies. Wood resources in State Forests are approximately 448.5 million cubic meters (209 cubic meters/hectare) compared with 188.6 million cubic meters (119 cubic meters/hectare) in private forests.

### **Solid Wood Products Situation/Outlook**

The majority of Polish saw mills are small and obsolete. Productivity in this sector is quite high despite being very labor intensive. The Directorate of State Forests proposed funding for modernizing the more profitable saw mills. However, the Polish Chamber of Wood Industry which represents saw mills lobbied against this proposal. The Chamber would rather see a decrease in the price of wood the government sells to mills.

The Polish Parliament introduced a 7 percent VAT tax on round wood in September 2000 which will be in force until the end of 2002. The VAT on sawn wood is 22 percent. The Polish Chamber of Wood Industry has requested similar VAT on both products either at the 22 percent or 7 percent level. The Directorate of State Forests believes the higher VAT will make the wood too expensive and encourage imports. Most small sawmills are exempt from VAT taxes due to low turnover. In 2000 the maximum limit for this exemption was PLN 80,000 (\$ 20,000). In 2001 the limit has been lowered up to PLN 39,800 (\$10,000). This exemption allows them to compete with larger mills. The larger sawmills are planning to organize consortium which would negotiate wood prices with the Directorate of State Forest in the future.

Poland produces sawn wood (hard and soft), wood panels (fiberboard and particle board) as well as construction materials, including windows, door frames and flooring. For the last few years, demand for these products in Poland has grown along with the rest of the economy. Fiberboard and particle board are in great demand. While some production is exported, some kinds of boards and panels, types not produced by Polish manufacturers, are also imported. Around 90 percent of all imported panels and boards are used by the construction and furniture industries.

Polish plywood production in 1999 was 127 thousand cubic meters (40 percent from softwood and 60 percent from hardwood). It is estimated that in 2000, plywood production was slightly lower by around 3 percent and was approximately 123 thousand cubic meters, including 73 thousand cubic meters of hardwood and 50 thousand cubic meters of softwood plywood. It is estimated that the 2001 production will remain stable. The wooden panel industry uses almost 25 percent of raw wood materials supplied directly from forests as well as rejected industrial wood.

## **TRADE**

## Overview/Outlook

Polish exports of wood and wood products reached \$867 million during the first three quarters of 2000 and were 2.5 percent higher compared with the same period in 1999 (\$846 million). Most production was exported to the European Union. Imports of wood and wood products increased by 13 percent from \$241 million during the first nine months of 1999 up to \$273 million during the same period of 2000. Polish exports of sawn wood in 1999 were 507.8 thousand cubic meters while imports were 210.9 thousand cubic meters. There is strong demand in Poland for wooden industrial pallets (Euro-pallets). Experts suggest around 800,000 - 1 million wooden pallets are needed every month.

The European Union is the major supplier of wood products (mainly wooden panels and boards) to Poland. Imports from the European Union represent 55 percent of the total. Twenty-three percent is from the former Soviet Union. Poland has eliminated the import tax on rough wood in 2001 from all suppliers. Nevertheless, U.S. exports are at a disadvantage due to higher import tariffs (anywhere from 3 - 9 percent), while tariffs on all wood products from Central and Eastern Europe, the European Union and less-developed countries are zero.

After a decrease in Polish furniture exports to Russia in 1998, the 1999 and 2000 showed improvement. Polish furniture manufacturers increased exports to the European Union and the United States.

## Market Development Strategies

Temperate hardwood lumber and logs: U.S. hard wood exporters may benefit from the expansion and continued success of the Polish furniture industry. In addition to sawn lumber and veneers, U.S. oak logs are also imported by Polish manufacturers. According to the U.S. Census, exports of U.S. hardwood logs to Poland in eleven months of 2000 were only \$19 thousand, while hardwood lumber sales were \$216 thousand. U.S. panel/plywood exports to Poland increased slightly from \$3.4 million during the first eleven months of 1999 to \$ 3.5 million during the same period in 2000. Continued strong demand for Polish furniture makes hardwood logs, lumber and veneer the best market prospects for U.S. exporters.

U.S. exports of solid wood products (mainly sawn wood, veneer sheets and sheets for plywood, fibreboard, builders joinery and carpentry) to Poland were kept at the 1999 level (approximately \$5 million during the first three quarters of 2000 compared with \$5.4 during the same period in 1999). Total solid wood imports increased from \$ 262 million in the first three quarters of 1999 to \$ 300 million during the same period in 2000. There is still growing demand for high-quality wood, particularly hardwood in Poland. Hardwood is imported to Poland mainly from Germany, Denmark, Sweden, Russia, Lithuania, Estonia and Slovakia.

## MARKET SEGMENT ANALYSIS

### Construction Sector

The Polish construction sector constitutes almost 6 percent of GDP. The Ministry for Regional Development and Construction was created last year to regulate the sector and allocate funds for regional development and public housing. It will also administer foreign financial aid for regional development (the EU program PHARE, which in 2000 made available 130 million Euros and a projected 150 million Euros in 2001.) This money can be used mainly for infrastructure development in rural areas, creation of new jobs, and construction of roads and

public utility buildings.

The construction sector did not grow as expected in 2000. Although there was some growth during the first quarter, increases in interest rates and the lack of credit hurt the industry. Experts do not envision any new commercial incentives or government assistance to support the sale of new apartments which will dampen new construction. Interest rates on commercial loans remain high (20-22 percent). Residential building construction increased 7.7 percent in 2000. There were 87.6 thousand of apartments finished by the end of the year (3.3 percent more than in 1999). There were 21,245 new buildings finished in three quarters of 2000 of which 18,230 single-family dwellings. The majority of housing construction are two or three families dwellings done by individuals or private companies.

Wood-frame construction is not as popular in Poland primarily due to higher costs. Most residential housing is constructed with bricks and concrete. Specialists note the large potential for wood-frame construction in Poland, as it is cheaper and less time-consuming. This market, however, is developing very slowly.

Wooden door and window frames are becoming more popular in the residential construction industry. Poland produced 8.99 million square meters in 1999, which was 76 percent of all joinery production. This includes 3.1 million square meters of window frames (52 percent of all kinds of window frames) and 5.9 million square meters of doors. During the first eleven months of 2000, production of wooden joinery was 8.6 million square meters and could more than double by 2010.

The commercial construction sector flourished in 2000, especially in the Warsaw region. The growth in hyperstore construction accounted for a large portion of the growth. Office construction has begun to expand to other major cities in Poland and is expected to continue until 2010. The most dynamic areas outside Warsaw are Katowice region, Poznan, Krakow, Gdansk and Gdynia, Lodz. These areas are currently witnessing economic growth, mainly in the service and industrial sectors. Construction in medium and small cities will account for a large portion of office construction after 2001. In Poland, there are 20 cities with 200,000 or more inhabitants, and 40 cities with between 75,000 - 200,000 inhabitants. Most lack office facilities.

Along with hyperstores, hotel construction is expected to grow during the next several years. Excluding Warsaw there are very few international hotel chains in Poland. Moreover, there is an absence of medium and inexpensive hotels. French companies ACCOR and ENVERGURE, British Bass Hotels and Resorts and American Best Western plan to build around 70 hotels of economy class within next five years in Poland. Also Polish hotel chain ORBIS is in process of improving its 55 already existing hotels and build next 12 by the 2002. There will be a steady increase in the number of hotel beds from 99,000 in 2000 to 114 ,000 in 2004 with the biggest increase in medium and lower cost hotels.

Germany is the primary supplier of construction materials to Poland. Tariff differentials make it extremely difficult for U.S. companies to compete. EU wood products enter duty free while a 9 percent import duty is applied to all U.S. wood products, excluding lumber which is zero for all countries .

## **Furniture & Interiors Sector**

The furniture sector improved in 2000. Exports increased, especially to the United States, United Kingdom,

Belgium, France and Czech Republic. The Russian market has shown improvement, but slowly due to high import taxes (Euro 0.8 per kilogram) and the appreciation of the Polish zloty. Ukraine is considered a better market than where sales were twice as high as those to Russia. Exports of Polish furniture increased to \$1.0 billion during the first 6 months of 2000. Germany, Belgium, Sweden and France are main markets. Exports to the United States have doubled from \$15 million during the first six months of 1999 to \$31 million during the first six months of 2000 .

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

Particle board production represents 70 percent of all ligneous boards, fibreboard 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. From Jan - November 2000, 2.6 million cubic meters of particle board and similar wooden board were produced, as well as 116.7 million square meters of fiberboard.

### **Material Handling Industry**

There are 1200-1500 wooden pallet manufacturers in Poland. They produce around 1 million pallets a month with most of this production exported to Germany and other EU countries. Since 1997, the EU has imposed an anti-dumping duty of 10.6 percent (6.3 percent for new suppliers) on Polish pallets. Most exporters are members of EURO pallets Producers Association which negotiated 0 percent tariff on products delivered by its members (at the maximum price of Euro 5.6 per pallet).

## STATISTICAL INFORMATION

### Strategic Indicator Tables

FOREST PRODUCT						
STRATEGIC INDICATOR TABLES FOR POLAND						
(Please do not add/delete rows or columns -- note and other info must be added below row 110 -- thank you!)						
CONSTRUCTION MARKET						
Country:	Previous	Current	Following			
Report Year:	CY 1999	CY 2000	CY 2001			
Total Housing Starts (thousand units)	113	110	110			
--of which, wood frame (thousand units)	0	1	1			
--of which, steel, masonry, other materials (thousand units)	112	109	109			
--of total starts, residential (thousand units)	113	84	85			
----of residential, single family (thousand units)	77	56	55			
----of residential, multi-family (thousand units)	36	28	30			
--of total starts, commercial (thousand units)	0	0	1			
Total Value of Commercial Construction Market (\$US mil)	9,000	9,000	9,000			
Total Value of Repair and Remodeling Market (\$US million)	3,900	4,500	5,500			
FURNITURE & INTERIORS MARKET						
Country:	Previous	Current	Following			
Report Year:	CY 1999	CY 2000	CY 2001			
Total Housing Starts (number of units)	113,408	110,400	110,500			
Total Number of Households)	12,720	12,900	13,100			
Furniture Production (\$US million)	1,900	2,100	2,100			
Total Furniture Imports (\$US million)	340	350	350			
Total Furniture Exports (\$US million)	2,000	1,800	2,000			
Interiors Market Size (\$US million)	500	500	500			

MATERIAL HANDLING MARKET						
Country:	Previous	Current	Following			
Report Year:	CY 1999	CY 2000	CY 2001			
Total Value of Industrial Output (\$US million)	117,352	104,987	107,500			
New Pallet Production (million units)	35	36	37			
FOREST AREA						
Country:	Previous	Current	Following			
Report Year:	CY 1999	CY 2000	CY 2001			
Total Land Area (million hectares)	31	31	31			
Total Forest Area (million hectares)	9	9	9			
--of which, Commercial ('000 hectares)	8,491	8,550	8,650			
----of commercial, tropical hardwood ('000 hectares)	0	0	0			
----of commercial, temperate hardwood ('000 hectares)	1,937	1,950	2,000			
----of commercial, softwood ('000 hectares)	6,554	6,600	6,650			
Forest Type						
--of which, virgin ('000 hectares)	0	0	0			
--of which, plantation ('000 hectares)	63	65	66			
--of which, other commercial (regrowth) ('000 hectares)	20	20	21			
Total Volume of Standing Timber (thousand cubic meters)	1,607	1,637	1,660			
--of which, Commercial Timber ('000 cum)	725	750	770			
Annual Timber Removal ('000 cum) 1/	24,268	25,800	27,000			
Annual Timber Growth Rate ('000 cum)	90,000	90,000	90,000			
Annual Allowable Cut ('000 cum)	26,000	27,000	29,000			
1/ If Removals exceeds growth rate, analyze impact in text.						
WOOD PRODUCTS SUBSIDIES						
Country:	Previous	Current	Following			
Year of Report	CY 1999	CY 2000	CY 2001			

Total Solid Wood Export Subsidy Outlay (\$US million)	n.a	n.a	n.a			
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)	15	15	15			
Scope (thousands of hectares)	20	20	20			
Are there other wood products export expansion activities? 1/						
1/ If yes, describe in report.						
2/ If yes, identify in Tariff and Tax Strategic Indicator Table.						
FOREST PRODUCT TARIFFS AND TAXES (percent)		Tariff	Tariff	Other		
Country:	Product	Current	Following	Import	Total Cost	Export
Report Year:	Description 1/	Year	Year	Taxes/Fees	of Import 2/	Tax
4401	Wood Chips	3	3	0	3%	none
4403	Logs	0	0	7/22	7% - 22%	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/Orie nted 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 utensils 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
4422						none
4423						none
9403.3, 9403.40, 9403.50, 9403.60	Wooden furniture	12	12	22	34 %	

9406	Pre-fabricated Houses, a subsection under chapter	6	6	22	28 %	
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.						

**PS&D Tables and Trade Matrices**

(Trade data for 2000 represents estimates, based on first nine months figures available).

**Temperate Hardwood Lumber**

PSD Table						
Country	Poland					
Commodity	Temperate Hardwood Lumber			1000 CUBIC METERS		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	600	581	600	590	0	610
Imports	120	104	90	110	0	100
TOTAL SUPPLY	720	685	690	700	0	710
Exports	170	65	110	80	0	90
Domestic Consumption	550	620	580	620	0	620
TOTAL DISTRIBUTION	720	685	690	700	0	710

Import Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	000 CUM
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	43	Germany	52
Ukraine	22	Ukraine	30
Slovakia	14	Slovakia	15
Russia	11	Russia	10
Total for Others	90		107
Others not Listed	14		3
Grand Total	104		110

Export Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	1000 CUM
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	25	Latvia	30
Sweden	15	China	24
Denmark	11	Denmark	14
Spain	4	Germany	8
Austria	3		
Total for Others	58		76
Others not Listed	7		4
Grand Total	65		80

**Temperate Hardwood Logs**

PSD Table						
Country	Poland					
Commodity	Temperate Hardwood Logs			1000 CUBIC METERS		
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	5400	5400	5400	5400	0	5200
Imports	300	92	600	84	0	100
<b>TOTAL SUPPLY</b>	<b>5700</b>	<b>5492</b>	<b>6000</b>	<b>5484</b>	<b>0</b>	<b>5300</b>
Exports	300	238	540	190	0	200
Domestic Consumption	5400	5254	5460	5294	0	5100
<b>TOTAL DISTRIBUTION</b>	<b>5700</b>	<b>5492</b>	<b>6000</b>	<b>5484</b>	<b>0</b>	<b>5300</b>

Import Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	000 CUM
Imports for:	1999		2000
U.S.	2	U.S.	
Others		Others	
Slovakia	22	Germany	20
Germany	19	Slovakia	15
Ukraine	12	Ukraine	10
Latvia	6	Lithuania	6
Bielorus	5	Latvia	5
Lithuania	5	Bielorus	4
Russia	3	Russia	4
Total for Others	72		64
Others not Listed	18		20
Grand Total	92		84

Export Trade Matrix			
Country	Poland		
Commodity	Temperate Hardwood Logs		
Time period	Jan-Dec	Units:	000 CUM
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	59	Italy	50
Denmark	20	Germany	43
Sweden	20	Sweden	18
Italy	18	Denmark	12
Belgium	12	Spain	9
Austria	11	Netherlands	9
Netherlands	10	Belgium	8
Spain	6	Austria	7
France	6	France	6
Finland	6	Finland	6
Total for Others	168		168
Others not Listed	70		22
Grand Total	238		190

**Softwood Lumber**

PSD Table						
Country	Poland					
Commodity	Softwood Lumber				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	3500	2905	3200	3000	0	3200
Imports	100	107	100	111	0	115
TOTAL SUPPLY	3600	3012	3300	3111	0	3315
Exports	700	443	600	618	0	620
Domestic Consumption	2900	2569	2700	2493	0	2695
TOTAL DISTRIBUTION	3600	3012	3300	3111	0	3315

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	1000 CUM
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Lithuania	60	Lithuania	70
Bielorus	18	Bielorus	19
Russia	11	Russia	13
Ukraine	4	Ukraine	2
Germany	3	Germany	1
		Latvia	1
Total for Others	96		106
Others not Listed	11		5
Grand Total	107		111

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	000 CUM
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Austria	180	Germany	247
Czech Rep.	154	Czech Rep.	133
Italy	45	Denmark	105
Germany	35	Austria	58
Belgium	8	Italy	28
UK	5	Netherlands	11
France	5	France	3
		Belgium	1
		UK	1
Total for Others	432		587
Others not Listed	11		31
Grand Total	443		618

**Softwood Logs**

PSD Table						
Country	Poland					
Commodity	Softwood Logs				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	15100	15100	15300	15300	0	15400
Imports	450	400	400	410	0	400
TOTAL SUPPLY	15550	15500	15700	15710	0	15800
Exports	500	400	600	524	0	600
Domestic Consumption	15050	15100	15100	15186	0	15200
TOTAL DISTRIBUTION	15550	15500	15700	15710	0	15800

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Logs		
Time period	Jan-Dec	Units:	000 CUM
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Russia	126	Germany	120
Sweden	95	Russia	119
Germany	64	Sweden	99
Netherlands	37	Netherlands	45
Ukraine	22	Ukraine	15
Total for Others	344		398
Others not Listed	56		12
Grand Total	400		410

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Logs		
Time period	Jan-Dec	Units:	000 CUM
Exports for:	1999		2000
U.S.		U.S.	
Others		Others	
Germany	182	Germany	250
Netherlands	78	Netherlands	98
Belgium	69	Belgium	45
Denmark	22	Denmark	15
Italy	10	UK	10
France	8	France	10
Austria	3	Hungary	7
Spain	3	Czech Rep.	2
Total for Others	375		437
Others not Listed	25		87
Grand Total	400		524

**Softwood Plywood**

PSD Table						
Country	Poland					
Commodity	Softwood Plywood				1000 CUBIC METERS	
	Revised	1999	Preliminary	2000	Forecast	2001
	Old	New	Old	New	Old	New
Market Year Begin		01/1999		01/2000		01/2001
Production	50	70	80	50	0	50
Imports	30	14	14	15	0	15
TOTAL SUPPLY	80	84	94	65	0	65
Exports	30	26	80	25	0	25
Domestic Consumption	50	58	14	40	0	40
TOTAL DISTRIBUTION	80	84	94	65	0	65

Import Trade Matrix			
Country	Poland		
Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	000 CUM
Imports for:	1999		2000
U.S.		U.S.	
Others		Others	
Finland	7	Finland	7
Spain	2	Germany	2
Russia	2	Bielorus	1
Germany	1	Indonesia	1
Bielorus	1		
Total for Others	13		11
Others not Listed	1		4
Grand Total	14		15

Export Trade Matrix			
Country	Poland		
Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	000 CUM
Exports for:	1999		2000
U.S.	2	U.S.	2
Others		Others	
Germany	7	Germany	8
Austria	2	Sweden	3
Sweden	2	Norway	2
Norway	1	Denmark	1
Ukraine	1	Slovakia	1
Total for Others	13		15
Others not Listed	11		8
Grand Total	26		25