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Poland

Forest Products

Forest Products Annual Report

1999

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Report Highlights:
Growth of Poland's wood products industry faltered in 1998 because of a 50% decline in furniture sales to Russia. Domestic demand for wood products continues to grow thanks to the strong Polish economy.

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

Executive Summary

The area of forests in Poland represents 8.8 million hectares or 28 percent of total territory. The government controls over 80 percent of forests and supplies 99 percent of the roundwood used by Polish wood products industry. This industry is one of the most rapidly growing sectors in Poland, specially production of furniture. This sector accounts for the majority of this growth with sales of US$ 1.5 billion in 1998 which was 50 percent less than in 1997 due to financial crisis in Russia, the biggest client of Polish furniture.

Basic wood articles produced in Poland are sawn wood (hard and soft), wood panels (fiberboard and particle board) as well as construction elements (construction structures, window and door frames). For the last few years a rapid increase in a local demand on basic wood products, mainly due to a good economic situation in the country as well as a return to natural and ecological raw materials. Fiberboards and particle boards are in great demand on local market.

Poland is self-sufficient in wood products. Some production is exported, but boards and panels are also imported and their imports are growing rapidly every year. The structure of production of wooden panels and boards in Poland is similar to the average European. Around 90 percent of all panels and boards is supplied to construction and furniture industry, but a prevailing share is used for furniture production. The introduction of new kinds of panels and boards, as well as an increase in their use, are very distinctive and profitable for Polish industry.

Polish wood products are becoming more popular in the European countries, as ecological and high standard products offered at relatively low prices.

Poland is a market for U.S. forest product exports. Imports of U.S. sawn wood, veneer sheets, plywood, particle board and fibreboard, densified wood, building joinery and carpentry of wood continue. Following resolution of a phytosanitary barrier to trade, Poland imported the first shipments of oak logs from the U.S. in 1997. In 1998, imports of “Logs and Chips” from the U.S. had grown to a record value of $643,000. There is strong interest in wooden industrial pallets size of Euro-pallets (around 800 000 - 1 million units every month), as well raw material for production of Euro-pallets.

In comparison to other suppliers of wood products, the U.S. imports are disadvantaged by higher import tariffs (anywhere from 3 - 12 percent), while tariffs on products from less developed countries, Central and Eastern Europe and EU countries are 0 percent.

Strategic Indicator Tables

Construction Market

STRATEGIC INDICATOR TABLE: CONSTRUCTION MARKET			
	1997	1998	1999
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	607200	640000	670000
--Of which, wood frame	2000	1500	2000
--Of which, steel, masonry, other materials	605200	638500	668000
--Of total starts, residential	602900	624500	650000
----Of residential, single family	567600	580000	590000
----Of residential, multi-family	35300	44500	60000
--Of total starts, commercial	4300	15500	20000
Total Value of Commercial Construction Market ($US million)	9763	9000	9000
Total Value of Repair and Remodeling Market ($US million)	3556	3500	3500
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?	equal	equal	equal
Are non-tariff barriers on plywood from the United States higher, equal or lower than plywood imported from other countries?	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.			
--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 availabity, etc.) high, medium or low? 2/	medium	medium	medium
Are consumer preferences for solid wood materials vis-a-vis non-wood materials in construction high, medium or low?	high	high	high
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high?	high	high	high
If price quotes for construction and structural wood products are available, identify the leading source(s)			

1/ According to different governmental agreements there is 0 percent tariff on wood and articles thereof imported to Poland from the EU, EFTA, Czech and Slovak Republics, Hungary, Slovenia, Roumania, Bulgaria, Lithuania, Latvia, Estonia, Israel and Farrow Islands.

2/ Timber frame construction of the U.S. style is generally acceptable. But the conditions are not the same. The mortgage is available from a few banks and it is not affordable for an average Polish family.

The construction sector of the Polish economy constitutes approximately 6 percent of national GDP. Supported by government subsidies during communist times, this sector went into recession during the transition process embracing the entire Polish economy in the early 1990s. Construction is now gradually recovering. 1997 and 1998 were the first two consecutive years of growth in the construction sector since 1990. The construction industry has been one of the most rapidly privatized sectors in the Polish economy, reaching 90 percent private ownership in 1996.

Investments outlays in building and other facilities in Poland had been growing since 1993 at the rate of about 30 percent annually (in current prices). This growth was largely attributable to increased demand on construction and modernization work, and its level was higher by 23.8 percent compared to 9.1 percent growth in 1996. The level of repair and renovation work was higher by 12.1 percent in 1997. In 1996 the highest outlays on buildings were allocated by enterprises, government institutions, local councils and households. Outlays by financial, insurance and non-commercial institutions were far lower. In 1997 and 1998 a significant change in this structure was observed.

Commercial construction increased in 1997 and 1998 as indicated by data relating to industrial buildings, offices, shopping facilities and building for agriculture. In comparison with 1996, a decrease was recorded only in the construction in the forestry sector, whereas the cubic capacity of all other categories of commercial buildings grew by a third or even by half. It is hard to estimate precisely the value of commercial projects constructed currently and planned for the next few years, but it most probably reaches several dozen billion zloties. New production, shopping and storage facilities, hotels, restaurants and offices are being built in all parts of Poland. Around 200 additional super and hypermarkets are planned to be built in Poland by the year 2000 worth around US$ 1.4 billion according to BOSS Agency. Investments in the construction of filling stations represents a similar value.

Plans for development of hotel and tourist networks are also impressive. According to the Institute of Tourism, approximately 170 new hotels will be built in Poland by the year 2004. Around 50 percent of the already existing hotels are planned to be renovated or refurbished.

The materials for renovation/reconstruction and wood-frame houses should increase demand for wood products. Poles still prefer traditional brick construction over wooden. Wood houses are still more expensive than those built from bricks and concrete. Higher initial construction cost and consumer habits will eventually change as heating costs rise and force consumers to factor heating costs into their housing construction decisions.

Germany is the primary supplier of construction materials and it could be difficult for the American companies to be competitive due to a difference in tariffs. EU wooden products are duty free, while 3 or 6 percent import duty is applicable to American products.

According to an analysis of the construction sector made by the Main Statistical Office for first 6 months of 1998, the output of construction industry was higher by 16.6 percent compared to the similar period in 1997. The biggest increase was observed among companies offering finishing services (by 51.8 percent) including construction carpentry (99,9 percent increase) and flooring services (83.2 percent increase).

Furniture

STRATEGIC INDICATORS TABLE: FURNITURE & INTERIORS MARKET			
	1997	1998	1999
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	607200	546480	601128
Total Number of Households	31776	31500	31300
Furniture Production ($US million)	1627	1600	1900
Interiors Market Size ($US million)	270	400	500
Total Furniture Imports ($US million)	88	200	250
Total Furniture Exports ($US million)	1488	1500	1700
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?	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)			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other.			
--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?	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.

Furniture production has grown rapidly over the past few years. Last year exports of furniture were hurt by the financial crisis in Russia. Now the situation appear to be stabilizing. 1999 production and exports are forecast to fall to 1996 levels. Poland is self-sufficient in softwood timber. Demand for imported hardwood timber like beech, maple and tropical wood is growing.

Use of fiberboard and particle board in the furniture industry grows each year. Use of fiberboard increased by 20 percent over the last four years, while the use of particle boards increased by 71 percent. Some production is exported, but boards and panels are also imported and their imports are growing rapidly every year. The structure of production of wooden panels and boards in Poland is similar to the average European: 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 construction and furniture industry, but a prevailing share is used for furniture production. In a group of fibreboard a production of MDF boards is growing very quickly: in 1994 it was only 1 percent of all fiberboards production, in 1997 - has risen up to 10 percent. 50 percent of all fibreboards are refined ones, and the majority of its production is used by the furniture industry. The introduction of new kinds of panels and boards, as well as an enlargement of its use, are very distinctive and profitable for Polish industry.

Material Handling

STRATEGIC INDICATOR TABLE: MATERIAL HANDLING MARKET			
	1997	1998	1999
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Value of Industrial Output ($US million)	383	400	450
New Pallet Production (million units)	25	30	35
Are consumer preferences for solid wood pallets and packaging materials vis-a-vis non-wood materials high, medium or low?	high	high	high
Are industry/trade preferences for repaired/recycled pallets over new pallets low, medium or high? 1/	low	low	low
From Post's experience, is the willingness of U.S. suppliers to deliver product per importers' specifications low, medium or high?	n.a.	n.a.	n.a.
Identify leading source(s) of price quotes:			
Are there market development programs for the materials handling market expansion funded by foreign governments?			
If yes, identify the following:			
--Which Countries?			
--Form(s) of competition: Export subsidy, trade show, trade servicing, permanent market representative (number), permanent office (location), or other.			
--Estimated annual market expansion outlay ($US million) by country			

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

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.

Subsidies

There are no subsidies on production or exports of wood products in Poland and there are no plans to introduce subsidies in the near future.

Tariffs and Taxes

STRATEGIC INDICATOR TABLE: FOREST PRODUCT TARIFFS AND TAXES (percent)						
		1999	2000			
		Tariff	Tariff	Other		
Country: Poland	Product	Current	Following	Import	Total Cost	Export
Report Year: 1999	Description	Year	Year	Taxes/Fees VAT	of Import	Tax
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
9403.30/40/50/60	Wooden furniture	12	12	22	34 %	none
9406.00.10	Pre-fabricated Houses	6	n/a	22	28 %	none

Forest Area

STRATEGIC INDICATOR TABLE: FOREST AREA (million hectares/million cum)			
	1997	1998	1999
Country:	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	9	9.1
--of which, Commercial	8.7	8.8	8.9
----of commercial, tropical hardwood	0	0	0
----of commercial, temperate hardwood	1.9	2	2
----of commercial, softwood	6.8	6.7	6.7
--of forest area, non-commercial	0.1	0.2	0.2
Forest Type	8.8	9	9.1
--Of which, virgin	0.1	0.1	0.1
--Of which, plantation	0.05	0.06	0.07
--Of which, other commercial (regrowth)	0.01	0.01	0.02
Forest Ownership			
--Nationally owned and no commercial access	0.1	0.1	0.1
--Nationally owned, commercial logging permitted	6.9	7	7
--Other publicly owned land, no commercial access			
--Other publicly owned, logging permitted	0.2	0.2	0.3
--privately owned commercial forest	1.6	1.7	1.7
Total Volume of Standing Timber	1,607	1,607	1,607
--Of which, Commercial Timber	1,370	1,370	1,370
Annual Timber Removal	21.7	21.5	22
Annual Timber Growth Rate	30	31	32
Annual Allowable Cut	22	22	22

Forest Area

Poland has 8.8 million hectares of forests, which represents 28 percent of total Polish territory. The are projects to enlarge the forest area in the next few years by around 300 000 hectares due to the land of former collective farms which were overtaken by the State Forests. Over 80 percent of forest area is still controlled by the State. The rest is privately owned. 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 forest is damaged; half of which is completely or partially defoliated. Insects, particularly nun moth, air pollution, fire and wildlife were the main cause of damage.

In 1997 the Ministry of State Treasure approved a new reprivatisation law. According to the new law former forest owners or their heirs could reclaim their properties. The current forest owners and ecologists are against such a regulation. They say once the forest is in private hands it would be cut which will undermine the governmental program for protection of the forests.

Compounding the problem, budgetary expenditures on forest management are not enough. The budget on forestry and environment for 1999 is even lower than in previous year.

Temperate Hardwood Lumber

PSD Table						
Country:	Poland					
Commodity:	Temperate Hardwood Lumber					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	590	605	590	600	0	600
Imports	120	61	130	100	0	120
TOTAL SUPPLY	710	666	720	700	0	720
Exports	35	133	40	150	0	170
Domestic Consumption	675	533	680	550	0	550
TOTAL DISTRIBUTION	710	666	720	700	0	720

Temperate Hardwood Lumber - Trade

- Imports

Import Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.		U.S.	15
Others		Others	
Belarus	45	Belarus	20
Lithuania	40	Germany	10
Germany	15	Ukraine	7
Ukraine	10	Latvia	3
		Lithuania	3
Total for Others	110		43
Others not listed			3
Grand Total	110		61

- Exports

Export Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:			
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
Germany	22	Italy	45
Sweden	8	Austria	26
Norway	5	Sweden	14
The Netherlands	3	Germany	12
Italy	2	The Netherlands	9
		Belgium	6
		France	6
Total for Others	40		118
Others not listed			15
Grand Total	40		133

Temperate Hardwood Logs

PSD Table						
Country:	Poland					
Commodity:	Temperate Hardwood Logs					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	5350	5350	5400	5400	0	5400
Imports	300	240	320	270	0	300
TOTAL SUPPLY	5650	5590	5720	5670	0	5700
Exports	300	965	360	310	0	300
Domestic Consumption	5350	4625	5360	5360	0	5400
TOTAL DISTRIBUTION	5650	5590	5720	5670	0	5700

Temperate Hardwood Logs - Trade

- Imports

Import Trade Matrix			
Country:		Units:	cubic m
Commodity:			
Time period:			
Imports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Belarus	97	Belarus	173
Lithuania	37	Germany	28
Estonia	33	Ukraine	24
Ukraine	25	Russia	5
Germany	16	Lithuania	3
Russia	13	Estonia	2
		Slovakia	1
Total for Others	221		236
Others not listed	10		4
Grand Total	231		240

- Exports

Export Trade Matrix			
Country:		Units:	cubic m
Commodity:			
Time period:			
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
Austria	28	Latvia	630
Germany	7	Germany	123
Denmark	5	Sweden	52
Latvia	5	Austria	50
Czech Rep.	3	Denmark	46
Spain	1	Czech Rep.	20
Total for Others	49		920
Others not listed	5		45
Grand Total	54		965

Softwood Lumber

PSD Table						
Country:	Poland					
Commodity:	Softwood Lumber					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	4700	3154	4750	3200	0	3500
Imports	300	68	300	80	0	100
TOTAL SUPPLY	5000	3222	5050	3280	0	3600
Exports	940	493	950	500	0	700
Domestic Consumption	4060	2729	4100	2780	0	2900
TOTAL DISTRIBUTION	5000	3222	5050	3280	0	3600

Softwood Lumber - Trade

- Imports

Import Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:	Jan-Dec		
Imports for	1996		1997
U.S.	0	U.S.	0
Others		Others	
Latvia	34	Germany	150
Germany	16	Sweden	111
Sweden	12	Latvia	83
Lithuania	9	Belarus	35
Austria	2	Russia	16
		Estonia	11
Total for Others	73		406
Others not listed			
Grand Total	73		406

- Exports

Export Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
Germany	180	Germany	238
The Netherlands	30	Belgium	74
Belgium	50	The Netherland	50
France	40	Czech Rep.	2
Austria	40	Iran	2
Italy	25		
Denmark	17		
Total for Others	382		366
Others not listed	24		127
Grand Total	406		493

Softwood Logs

PSD Table						
Country:	Poland					
Commodity:	Softwood Logs					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	15080	15080	15100	15100	0	15100
Imports	50	372	50	400	0	450
TOTAL SUPPLY	15130	15452	15150	15500	0	15550
Exports	580	436	590	500	0	500
Domestic Consumption	14550	15016	14560	15000	0	15050
TOTAL DISTRIBUTION	15130	15452	15150	15500	0	15550

Softwood Logs - Trade

- Imports

Import Trade Matrix			
Country:		Units:	cubic m
Commodity:			
Time period:			
Imports for	1996		1997
U.S.	1	U.S.	
Others		Others	
Belarus	90	Belarus	250
Russia	23	Russia	52
Lithuania	63	Latvia	37
Germany	17	Lithuania	24
		Germany	6
Total for Others	193		369
Others not listed	10		3
Grand Total	204		372

- Exports

Export Trade Matrix			
Country:		Units:	000 cum
Commodity:			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.		U.S.	
Others		Others	
Austria	132	Austria	136
Italy	19	Germany	77
Germany	6	Belgium	62
France	5	Italy	48
Sweden	1	France	42
		Czech Rep.	32
		Sweden	1
		Norway	1
		Egypt	0
Total for Others	163		400
Others not listed	11		36
Grand Total	174		436

Softwood Plywood

PSD Table						
Country:	Poland					
Commodity:	Softwood Plywood					
		1997		1998		1999
	Old	New	Old	New	Old	New
Market Year Begin		01/1997		01/1998		01/1999
Production	36	53	38	50	0	50
Imports	50	5	50	20	0	30
TOTAL SUPPLY	86	58	88	70	0	80
Exports	32	29	32	25	0	30
Domestic Consumption	54	29	56	45	0	50
TOTAL DISTRIBUTION	86	58	88	70	0	80

Softwood Plywood - Trade

- Imports

Import Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:			
Imports for	1996		1997
U.S.		U.S.	1
Others		Others	
Ukraine	25	Germany	2
Belarus	10	Russia	1
Germany	5	Finland	1
Finland	5		
Total for Others	45		4
Others not listed			
Grand Total	45		5

- Exports

Export Trade Matrix			
Country:		Units:	1000 cum
Commodity:			
Time period:	Jan-Dec		
Exports for	1996		1997
U.S.	0	U.S.	1
Others		Others	
Norway	10	Sweden	3
Sweden	7	Norway	7
Germany	6	Denmark	6
Denmark	5	Belgium	4
		Germany	4
Total for Others	28		24
Others not listed	3		4
Grand Total	31		29

Production

In 1997 Poland harvested 23.5 million cubic meters of wood, putting Poland at the fourth place in Europe - over 6 percent of the total European wood harvest and almost 9 percent of the amount harvested by the European Union. A considerable harvest and a positive trade balance in wood show that Poland is generally self-sufficient.

The 1997 production of plywood was 131.7 thousand CUM (40 percent from softwood and 60 percent from hardwood). During the first 10 months of 1998 the production of plywood was 102.6 thousand CUM. Based on partial year figure we expect 1988 production to be similar to 1997.

Consumption

The sawing industry is the biggest consumer of wood which is using almost 50 percent of industrial raw material. The material efficiency in this industry in Poland is 65 - 68 percent. These indices are comparable to the European figures but compared to the European, Polish sawing industry is very labor intensive.
The wooden panels industry is using wood raw material directly from the forest as well as industrial wood rejects. The Polish wooden pallet industry is using almost 25 percent of wood raw material for industrial processing.

In all wood processing sectors in Poland a systematic decrease of wood consumption is observed. Compared to 1990 these indices decreased in 1996 by 5 percent in fibreboard production, by 2 percent in plywood production and by 1 percent in particleboard production. It could be due to the increasing interest and popularity of PVC carpentry. Poland produces 46 percent of wooden window frames, 35 percent of PVC frames and 19 percent of aluminium window frames. Every year a production of wooden frames decreases. One of the factor is the increasing price on wood (during 1998 the wood price has risen by 50 percent).

Trade

Wood as the raw material is not very important for Polish foreign trade. Imports and exports of sawn wood have no big impact on the Polish wood industry either. Polish exports of wood in 1997 represented only 370 thousand CUM, which was 1.6 percent of a total wood production. 270 thousand CUM of sawn wood was imported into Poland (mainly from the Central and Eastern European and EU countries).

Temperate hardwood lumber and logs: 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 U.S. Census statistics. Continuing strong demand from Western Europe for Polish furniture and generally strong domestic demand support continued growth in imports of hardwood logs and lumber.