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# Poland

# Solid Wood Products

# Annual

# 2003

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**Report Highlights:**
**Poland's wood trade, virtually all with Europe continued to rise in 2001 and 2002 with 2001 exports valued at $1.1 billion and imports at $431 million. The construction sector continued to slump in 2001 consistent with the sluggish Polish economy. Construction firms and furniture manufacturers remain confident that EU integration in May 2004 is the key to economic resurgence.**

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

Many expect that Poland will be highly competitive in the wood sector once fully integrated in the European Union. In fact, Poland's 2001 forest products exports were valued at $1.1 billion (8.4 million to the U.S.- up 55 percent from 2000) while imports were valued at $431 million, up 6 percent from 2000 ($8.2 million from the U.S., decrease of 24 percent). This supports the notion that integration could stimulate economic growth. The Polish economy was as sluggish in 2002 as in 2001; just over 1 percent annual GDP growth. The construction sector continued to decline in 2002. On the other hand, the furniture sector continued to rebound in 2000 and 2001 after declining in 1998-1999.

# PRODUCTION

## Growing Resources

By the end of 2001 Poland had 8.9 million forested hectares (ha) which covered 28.4 percent of the country. Public forests accounted for 82.6 percent (7.34 million ha), including 7.26 million ha of forests administered by the government and 1.5 million ha of privately owned forests. The forest ownership structure has not changed much in recent years. The only noticeable change was an increase in forested area in national parks which accounted for one percent of national forested area in 1985 but two percent in 2001. Private forests are characterized by significantly dispersed ownership, lack of information on actual resources and wood cutting amounts, and little known economic activity.

Poland's forests are dominated by coniferous varieties – 76.3 percent of all forested area and 78.2 percent of wood volume, including scotch pine (together with larch, they represent 68 percent of forests), spruce (7.3 percent) and fir (3.2 percent). The composition of Polish forests changed considerably between 1945 and 2001 as broad-leaf varieties rose from 13.0 up to 22.7 percent among which are oak, ash, maple, beech, sycamore, birch and alder.

With its relatively high surface of forests and higher than European average resources, Poland's 1.9 billion CUM wood reserves ranks third in Europe (after Germany and France). Since 1967, Poland's wood resources have noticeably increased. It is estimated that in 2001, there were 1.7 billion (CUM), including 1.5 billion CUM in public forests and 189 million CUM in private forests. In terms of total forested area, average resources were 213 CUM per ha in public forests and 119 CUM per ha in private ones.

During the period 1980-January 2001 timber growth in public forests was around 890 million CUM. During this time 502 million CUM of timber were cut, which means that 388 million CUM of timber were added to total wood resources. The average growth of timber per ha in government owned forests over the past 20 years (1981-2001) is 6.55 CUM. The growth rate for the last three years averaged 7.89 CUM per ha. Increased resources are attributed to improved forestry management including improved harvesting and better reforestation (growth in resources outpaced cutting by 56 percent).

In 2001 timber production was 23.5 million CUM including around 3.7 million CUM of wind fallen or broken trees and deadwood.

**Solid Wood Products Situation/Outlook**

The wood market situation in Poland changed dramatically at the beginning of 2001 as the first sales decrease in10 years was registered. At the end of 2001, the Government of Poland (GOP) conducted an analysis of the raw wood market. Specifically, they reviewed the procedure for the sale of wood. The GOP decided that the quantity and price of wood could be negotiated. The GOP also established standards and classifications for different woods which were agreed to by the affected groups. Additionally, the sale estimates of State Forests were established at a more realistic level of 25 million CUM in 2002 as opposed to the unrealistic level of 27 million established in 2000. This more realistic level stablized the market.

Poland produces sawn wood (hard and soft), wood panels (fiberboard and particle board) as well as construction materials such as window and door frames and flooring. For the last few years, demand for these products in Poland has decreased as with the overall economy.

Polish plywood production continues a downward trend. Polish plywood production in 2001 was 88,500 CUM down from 96,200 CUM output in 2000. According to the Institute of Technology 40 percent of plywood production is softwood and 60 percent is hardwood. In the first 11 months of 2002 plywood production totaled 75,127 CUM.

## TRADE

**Overview/Outlook**

In 2001, Poland's forest products exports were valued at $1.1 billion ($8.4 million to the U.S.- up 55 percent from 2000) while imports reached $431 million, up 6 percent from 2000 ($8.2 million from the U.S., decrease of 24 percent). The main exports were lumber ($130 million compared with $179 million in 2000), logs ($21 million, $3 million down from 2000), particle board ($123 million, almost the same as in 2000), wood joinery and carpentry items ($156 million, down 8 percent), and wood packing cases and pallets ($126 million, $10 million less). Among imports, the most important were fiberboard ($79 million, $5 million more), lumber ($72 million compared with $65 million in 2000), wood joinery and carpentry ($46 million), particle board ($60 million), logs ($41 million) and veneer sheets and sheets for plywood ($31 million).

During the first three quarters of 2002, exports of wood products were valued at $948 million, up 10 percent compared with the same period of 2001. Polish imports reached $340 million, 9 percent higher than the same period of 2001. Within the first nine months of 2002, the United States exported $6.6 million of wood products to Poland and Poland supplied the U.S. with $7.1 million of wood products. In both cases there were slight increases compared to the same period of 2001.

**Market Development Strategies**

U.S. hardwood lumber and log exporters may benefit from the continuing expansion of the Polish furniture industry. In addition to sawn lumber and veneers, Polish manufacturers also import U.S. oak logs. According to U.S. Census data, U.S. panel/plywood exports to Poland decreased from $3.5 million during the first eleven months of 2001 to $3.1 million during the same period in 2002. Hardwood lumber sales doubled from $216,000 in 2000 to $482,000 in 2001. However the figures for January-November revealed a significant decrease from $437,000 in 2001 down to $197,000 in 2002. Softwood lumber imports were valued at $82,000 in 2001 and $0 for eleven months of 2002. There were no registered exports of U.S. hardwood logs to Poland during the first eleven months of 2002. Continued demand by Polish furniture manufacturers makes hardwood logs, lumber and veneer the best market prospects for U.S. exporters. Increased hardwood flooring may also generate market potential.

## MARKET SEGMENT ANALYSIS

**Construction Sector**

According to the Polish Central Statistical Office, the rate of construction in Poland, which includes both new construction and modernization, decreased 10.4 percent between December 2000 and December 2001 but shot up 37.1 percent in the month of November 2002. Various companies experienced growth including civil engineering, subcontractors and installation firms.

The construction sector is the fourth most important sector of the economy. Other important sectors are trade and real estate/consulting services. The construction sector in 2002 included industrial construction (26 percent), infrastructure (24 percent), apartment buildings (22 percent) and commercial (18 percent).

The number of construction permits issued between January and October 2002 was 67,384 (28.2 percent down from 2001). The number of apartment units completed in 2002 was 66, 924 (16.7 percent down from the same period of 2001). These figures have generally remained consistent over past several years consistent with the slow down in the economy. It is estimated that another 2.2 million units, 200,000 per year, would need to be completed by 2010 to cover actual demand. This pace is 2.5-3 times that of actual construction.

At the end of 2002 the GOP adopted a law which provides preferential loans at a fixed interest rate of 7 percent on housing loans repayable over a period of 25 years. These loans will be available in April/May 2003. The law also provides for government housing loan subsidies to cover the difference between the preferential and market interest rates. This program is targeted at middle income earners. The government hopes this program will spur home sales and construction thereby boosting the economy.

In addition, the Social Housing Program targets lower income citizens. This program funds construction of homes for rent and is administered by the National Housing Fund and subsidized by the State at about $120 million annually.

Experts agree that the Polish construction sector may be saved by quicker accession to the European Union (EU) as

Polish firms believe that they will be very competitive on the European market. Polish EU accession is likely to occur in May 2004.

Since new construction and renovation are the most important sales opportunities for wood product manufacturers, it is noteworthy that more than 40 percent of existing buildings were finished after 1970 but are in very bad condition. According to the Institute of Apartment Building Economy, about 7.5 million of 12 million apartments need renovation. There are two million buildings (5 percent of which are municipal government owned) which should be completely renovated. Also, experts estimate that about 40 million windows should be replaced in Poland. There is a need for 1.8 - 2.5 million flats while only 60-80 thousand are finished every year.

It is estimated that wood products used in construction represent about 8.5 percent of all raw materials. The slow down in the construction since 2000 resulted in reduced production of construction materials, especially ceramics, cement, lime and plaster, but also wood and carpentry products. The total value of wood construction materials sold in 2001 was PLN 2.7 billion ($0.6 billion), seven percent lower than in 2000.

As a result of the economic slow down in Poland since 2000, the pace of wooden window frame production could not be maintained. For wooden window frames, the market is divided almost equally between wood frames (50.5 percent) and plastic frames (49.5 percent). The production of wooden windows and doors represented 7.6 million square meters in eleven months of 2002, which was slightly lower than in the same period of 2001. The production of wooden windows and doors registered a 9 percent decrease in 2001 and represented 9.2 million square meters in 2001 compared to 10.1 million square meters in 2000. Wooden joinery represented 73.4 percent of the market (about 8.75 million square meters). The recession was felt deepest in the wooden window frame sector which decreased by 30 percent compared to its 2000 level. The wooden doors sector also survived the crisis, and suffered only a 2.3 percent decrease. Wooden doors represent 96 percent of the market while PVC doors make up the remainder. There are about 200 producers of wooden joinery in Poland. The Association of Construction Joinery Producers is optimistic about the market situation in the near term.

**Furniture & Interiors Sector**

As was the case in 2000, the furniture manufacturing sector continued to rebound in 2001 and 2002 after declining in 1998-1999. Production in almost all product categories rose in 2000. The biggest increase was in production of kitchen and den furniture during the first ten months of 2001. In addition, there was a noticable increase in kitchen furniture and bedroom sets (16 and 14 percent respectively).

Despite an unfavorable economic situation the furniture production sector did not suffer as other sectors did. Polish furniture 2001 exports were valued at $2.4 billion (12 percent increase and imports were $395 million (8 percent increase). The main furniture trading partners were EU countries: Germany, Sweden, France, Italy, and Netherlands. The export value of furniture to the U.S. totaled $62 million while imports of U.S. furniture increased to $3 million.

Furniture trade during the first three quarters of 2001 and 2002 saw exports of wooden chairs increase by 15 percent ($909 million in 2001 compared to $ 1.1 billion in 2002) while among other furniture, the increase was 7 percent ($801 million in 2001 compared to $862 million in 2002). Opinions about the future of the furniture sector are varied but mostly optimistic. There was a decrease in domestic sales in 2002 due to a slow down in the economy, increasing unemployment and decreasing individual savings. However, the majority of furniture produced is exported and there is no sign that exports will decline over the next few years. Experts are suggesting that future EU accession will make Poland among the biggest European producers of furniture after Germany, Italy, France and the UK.

**Material Handling Industry**

Exports of pallets in 2001 ($126 million) were 16 percent lower than in 2000. The majority of exports were to Europe. Exports to the United States were valued at $195,000. The production and sale of wooden pallets became increasingly unprofitable. Annual production of wood packaging materials is estimated at 2.5 million square meters. It is difficult to estimate how much of the total consists of pallets, but the National Association of Wood Pallet Manufacturers estimates that pallets make up the majority of the total.

By the end of 1999, there were 90 wood pallet producers in Poland. In the middle of 2001 their number declined to 40. According to the Association of Wooden Pallets Producers and Exporters, the situation in the pallet market is critical. This was caused by the generally bad economic situation in Poland and Europe, low production profitability, protracted price negotiations with the State Forests which supply the raw material. During these protracted negotiations, Poland lost its position in the European markets. The void left by Poland was filled by competitors from other Eastern and Central European countries. The production and sale of wood pallets also became unprofitable as many pharmaceutical manufacturers and food processors switched to plastic pallets for sanitary reasons. In addition, the price of wood increased by almost 20 percent, which made Polish pallets uncompetitive on the European market. This had a substantial impact since 82 percent of production is exported to EU markets. EU anti-dumping tariffs also resulted in decreased production and exports. Increased tariffs (10.6 percent) if export prices are lower than on the domestic market but (0 percent) if export and domestic prices are the same were valid until the end of 2002. If these measures are not extended, larger export opportunities will open for Polish pallet producers. Meanwhile, pallet market competition is intense and the shift to plastic pallets continues.

**Hardwood Logs, PSD**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | Poland | | | | | |
| Commodity | Temperate Hardwood Logs | | | | 1000 CUBIC METERS | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Production | 5300 | 6970 | 5400 | 7000 | 0 | 7000 |
| Imports | 90 | 682 | 90 | 550 | 0 | 600 |
| TOTAL SUPPLY | 5390 | 7652 | 5490 | 7550 | 0 | 7600 |
| Exports | 200 | 86 | 200 | 150 | 0 | 200 |
| Domestic Consumption | 5190 | 7566 | 5290 | 7400 | 0 | 7400 |
| TOTAL DISTRIBUTION | 5390 | 7652 | 5490 | 7550 | 0 | 7600 |

**Hardwood Logs, Import**

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Temperate Hardwood Logs | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Imports for: | 2001 | | 2002 |
| U.S. | 0 | U.S. | |
| Others | | Others | |
| Belarus | 224 | Ukraine | 115 |
| Ukraine | 147 | Belarus | 97 |
| Lithuania | 113 | Lithuania | 75 |
| Germany | 98 | Germany | 37 |
| Slovakia | 75 | Slovakia | 21 |
| Russia | 23 | Russia | 9 |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 680 | | 354 |
| Others not Listed | 2 | | 38 |
| Grand Total | 682 | | 392 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Hardwood Logs, Export**

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Temperate Hardwood Logs | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Exports for: | 2001 | | 2002 |
| U.S. | 2 | U.S. | |
| Others | | Others | |
| Denmark | 30 | Denmark | 21 |
| Sweden | 25 | Sweden | 18 |
| Austria | 8 | Germany | 14 |
| Germany | 6 | Italy | 4 |
| Latvia | 3 | Austria | 3 |
| Slovakia | 3 | Czech Rep. | 2 |
| China | 3 | China | 2 |
| Estonia | 2 | | |
| | | | |
| | | | |
| Total for Others | 80 | | 64 |
| Others not Listed | 4 | | 8 |
| Grand Total | 86 | | 72 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Hardwood Lumber, PSD**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | Poland | | | | | |
| Commodity | Temperate Hardwood Lumber | | | | 1000 CUBIC METERS | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Production | 560 | 444 | 560 | 450 | 0 | 450 |
| Imports | 90 | 99 | 90 | 80 | 0 | 80 |
| TOTAL SUPPLY | 650 | 543 | 650 | 530 | 0 | 530 |
| Exports | 100 | 64 | 100 | 64 | 0 | 64 |
| Domestic Consumption | 550 | 479 | 550 | 466 | 0 | 466 |
| TOTAL DISTRIBUTION | 650 | 543 | 650 | 530 | 0 | 530 |

**Hardwood Lumber, Export**

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Temperate Hardwood Lumber | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Exports for: | 2001 | | 2002 |
| U.S. | | U.S. | |
| Others | | Others | |
| Italy | 25 | Belgium | 9 |
| Germany | 20 | Germany | 8 |
| Sweden | 5 | Sweden | 6 |
| Belgium | 3 | The Netherlands | 5 |
| France | 2 | Finland | 5 |
| Denmark | 1 | Norway | 2 |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 56 | | 35 |
| Others not Listed | 8 | | 15 |
| Grand Total | 64 | | 50 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Hardwood Lumber, Import**

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Temperate Hardwood Lumber | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Imports for: | 2001 | | 2002 |
| U.S. | 1 | U.S. | |
| Others | | Others | |
| Germany | 34 | Ukraine | 29 |
| Ukraine | 22 | Germany | 12 |
| Slovakia | 10 | Slovakia | 3 |
| Latvia | 8 | Lithuania | 1 |
| Belarus | 8 | | |
| Lithuania | 5 | | |
| Russia | 5 | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 92 | | 45 |
| Others not Listed | 6 | | 6 |
| Grand Total | 99 | | 51 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Softwood Logs, PSD**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | Poland | | | | | |
| Commodity | Softwood Logs | | | | 1000 CUBIC METERS | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Production | 15350 | 18047 | 15300 | 18000 | 0 | 18000 |
| Imports | 408 | 331 | 400 | 300 | 0 | 300 |
| TOTAL SUPPLY | 15758 | 18378 | 15700 | 18300 | 0 | 18300 |
| Exports | 480 | 288 | 500 | 480 | 0 | 500 |
| Domestic Consumption | 15278 | 18090 | 15200 | 17820 | 0 | 17800 |
| TOTAL DISTRIBUTION | 15758 | 18378 | 15700 | 18300 | 0 | 18300 |

**Softwood Logs, Export**

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Logs | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Exports for: | 2001 | | 2002 |
| U.S. | 0 | U.S. | |
| Others | | Others | |
| Austria | 74 | Austria | 170 |
| Czech Rep. | 54 | Czech Rep. | 120 |
| Italy | 44 | Germany | 86 |
| Germany | 16 | Italy | 25 |
| | | Sweden | 8 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 188 | | 409 |
| Others not Listed | 100 | | 16 |
| Grand Total | 288 | | 425 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Softwood Logs, Import**

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Logs | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Imports for: | 2001 | | 2002 |
| U.S. | | U.S. | |
| Others | | Others | |
| Lithuania | 203 | Lithuania | 64 |
| Belarus | 53 | Ukraine | 50 |
| Ukraine | 44 | Belarus | 32 |
| Russia | 23 | Slovakia | 32 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 323 | | 178 |
| Others not Listed | 8 | | 10 |
| Grand Total | 331 | | 188 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Softwood Lumber, PSD**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | Poland | | | | | |
| Commodity | Softwood Lumber | | | | 1000 CUBIC METERS | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Production | 2800 | 2136 | 2800 | 2070 | 0 | 2000 |
| Imports | 148 | 174 | 140 | 150 | 0 | 170 |
| TOTAL SUPPLY | 2948 | 2310 | 2940 | 2220 | 0 | 2170 |
| Exports | 609 | 410 | 610 | 420 | 0 | 420 |
| Domestic Consumption | 2339 | 1900 | 2330 | 1800 | 0 | 1750 |
| TOTAL DISTRIBUTION | 2948 | 2310 | 2940 | 2220 | 0 | 2170 |

**Softwood Lumber, Export**

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Lumber | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Exports for: | 2001 | | 2002 |
| U.S. | | U.S. | |
| Others | | Others | |
| Germany | 97 | Germany | 90 |
| Netherlands | 80 | The Netherlands | 32 |
| Spain | 45 | France | 18 |
| France | 40 | Italyt | 10 |
| Italy | 30 | Tailand | 9 |
| Belgium | 48 | Czech Rep. | 2 |
| Denmark | 20 | Switzerland | 1 |
| Sweden | 15 | | |
| | | | |
| | | | |
| Total for Others | 375 | | 162 |
| Others not Listed | 35 | | 39 |
| Grand Total | 410 | | 201 |

**Softwood Lumber, Import**

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Lumber | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Imports for: | 2001 | | 2002 |
| U.S. | 1 | U.S. | 1 |
| Others | | Others | |
| Germany | 28 | Russia | 34 |
| Belarus | 24 | Germany | 12 |
| Russia | 18 | Belarus | 10 |
| Ukraine | 8 | Ukraine | 8 |
| Slovakia | 5 | Latvia | 3 |
| Latvia | 4 | Czech Rep. | 3 |
| Estonia | 4 | Denmark | 2 |
| Czech Rep. | 2 | | |
| Denmark | 2 | | |
| | | | |
| Total for Others | 95 | | 72 |
| Others not Listed | 78 | | |
| Grand Total | 174 | | 73 |
| | | | |
| 2002 data covers Jan-Sept period. | | | |

**Softwood Plywood, PSD**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | Poland | | | | | |
| Commodity | Softwood Plywood | | | | 1000 CUBIC METERS | |
| | Revised | 2001 | Preliminary | 2002 | Forecast | 2003 |
| | Old | New | Old | New | Old | New |
| Market Year Begin | | 01/2001 | | 01/2002 | | 01/2003 |
| Production | 50 | 60 | 50 | 55 | 0 | 55 |
| Imports | 18 | 9 | 15 | 15 | 0 | 10 |
| TOTAL SUPPLY | 68 | 69 | 65 | 70 | 0 | 65 |
| Exports | 20 | 32 | 25 | 30 | 0 | 30 |
| Domestic Consumption | 48 | 37 | 40 | 40 | 0 | 35 |
| TOTAL DISTRIBUTION | 68 | 69 | 65 | 70 | 0 | 65 |

**Softwood Plywood, Export**

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Plywood | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Exports for: | 2001 | | 2002 |
| U.S. | 4 | U.S. | 2 |
| Others | | Others | |
| Germany | 10 | Germany | 5 |
| Sweden | 5 | Sweden | 5 |
| Denmark | 4 | Norway | 2 |
| Norway | 3 | Denmark | 2 |
| Belgium | 2 | Belgium | 1 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 24 | | 15 |
| Others not Listed | 4 | | 3 |
| Grand Total | 32 | | 20 |
| | | | |
| 2002 data covers a Jan - Sept period | | | |

**Sofwood Plywood, Import**

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | Poland | | |
| Commodity | Softwood Plywood | | |
| Time period | Jan-Dec | Units: | 000 CUM |
| Imports for: | 2001 | | 2002 |
| U.S. | 0 | U.S. | |
| Others | | Others | |
| Finland | 3 | Finland | 3 |
| Lithuania | 2 | Germany | 2 |
| Czech Rep. | 1 | Lithuania | 1 |
| | | Czech Rep. | 1 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 6 | | 7 |
| Others not Listed | 3 | | 4 |
| Grand Total | 9 | | 11 |
| | | | |
| 2002 data covers a Jan - Sept period | | | |

**Strategic Indicators Tables for Poland**

| | | | | | | |
|---|---|---|---|---|---|---|
| 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 2001 | CY 2002 | CY 2003 | | | |
| Total Housing Starts (thousand units) | 114 | 97 | 97 | | | |
| --of which, wood frame (thousand units) | 0 | 0 | 0 | | | |
| --of which, steel, masonry, other materials (thousand units) | 114 | 97 | 97 | | | |
| --of total starts, residential (thousand units) | 86 | 72 | 72 | | | |
| ----of residential, single family (thousand units) | 55 | 40 | 40 | | | |
| ----of residential, multi-family (thousand units) | 36 | 31 | 31 | | | |
| --of total starts, commercial (thousand units) | 28 | 25 | 25 | | | |
| Total Value of Commercial Construction Market ($US mil) | 8,500 | 8,000 | 8,000 | | | |
| Total Value of Repair and Remodeling Market ($US million) | 6,000 | 5,800 | 5,800 | | | |
| | | | | | | |
| | | | | | | |
| FURNITURE & INTERIORS MARKET | | | | | | |
| Country: | Previous | Current | Following | | | |
| Report Year: | CY 2001 | CY 2002 | CY 2003 | | | |
| Total Housing Starts (number of units) | 114,415 | 97,138 | 97,000 | | | |
| Total Number of Households) | 12501* | 12501* | 12501* | | | |
| Furniture Production ($US million) | 3,256 | 2,200 | 2,500 | | | |
| Total Furniture Imports ($US million) | 395 | 400 | 450 | | | |
| Total Furniture Exports ($US million) | 2,400 | 2,400 | 2,500 | | | |
| Interiors Market Size ($US million) | 500 | 500 | 500 | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |
| | | | | | | |
| MATERIAL HANDLING MARKET | | | | | | |
| Country: | Previous | Current | Following | | | |
| Report Year: | CY 2001 | CY 2002 | CY 2003 | | | |
| Total Value of Industrial Output ($US million) | 117,273 | 118,563 | 125,000 | | | |
| New Pallet Production (million units) | 10 | 6 | 4 | | | |
| | | | | | | |
| | | | | | | |
| FOREST AREA | | | | | | |
| Country: | Previous | Current | Following | | | |
| Report Year: | CY 2001 | CY 2002 | CY 2003 | | | |
| Total Land Area (million hectares) | 31 | 31 | 31 | | | |
| Total Forest Area (million hectares) | 9 | 9 | 9 | | | |
| --of which, Commercial ('000 hectares) | 8,650 | 8,760 | 8,800 | | | |
| ----of commercial, tropical hardwood ('000 hectares) | 0 | 0 | 0 | | | |
| ----of commercial, temperate hardwood ('000 hectares) | 2,000 | 2,000 | 2,000 | | | |
| ----of commercial, softwood ('000 hectares) | 6,650 | 6,760 | 6,800 | | | |
| Forest Type | | | | | | |
| --of which, virgin ('000 hectares) | 0 | 0 | 0 | | | |
| --of which, plantation ('000 hectares) | 70 | 71 | 72 | | | |
| --of which, other commercial (regrowth) ('000 hectares) | 21 | 21 | 21 | | | |
| Total Volume of Standing Timber (thousand cubic meters) | 1,736 | 1,760 | 1,800 | | | |
| --of which, Commercial Timber ('000 cum) | 770 | 770 | 780 | | | |
| Annual Timber Removal ('000 cum) 1/ | 23,471 | 23,000 | 23,000 | | | |
| Annual Timber Growth Rate ('000 cum) | 89,000 | 89,000 | 90,000 | | | |
| Annual Allowable Cut ('000 cum) | 28,350 | 28,700 | 28,700 | | | |
| | | | | | | |
| 1/ If Removals exceeds growth rate, analyze impact in text. | | | | | | |
| | | | | | | |

| | | | | | | |
|---|---|---|---|---|---|---|
| | | | | | | |
| WOOD PRODUCTS SUBSIDIES | | | | | | |
| Country: | Previous | Current | Following | | | |
| Year of Report | CY 2001 | CY 2002 | CY 2003 | | | |
| 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 | Tariff | Other | | |
| Country: | Previous | Current | Following | Import | Total Cost | Export |
| Report Year: | Year | Year | Year | Taxes/Fees | of Import 2/ | Tax |
| 4401 | 3 | 3 | 3 | 0 | 3% | none |
| 4403 | 0 | 0 | 0 | 7/22 | 7% - 22% | none |
| 4404 | 9 | 9 | 9 | 7/22 | 16% - 31% | none |
| 4405 | 9 | 9 | 9 | 7/22 | 16% - 31% | none |
| 4406 | 9 | 9 | 9 | 7/22 | 16% - 31% | none |
| 4407 | 9 | 9 | 9 | 22 | 31 % | none |
| 4408 | 9 | 9 | 9 | 22 | 31 % | none |

| | | | | | | |
|---|---|---|---|---|---|---|
| 4409 | 9 | 9 | 9 | 22 | 31 % | none |
| 4410 | 9 | 9 | 9 | 22 | 31 % | none |
| 4411 | 9 | 9 | 9 | 22 | 31 % | none |
| 4412 | 9 | 9 | 9 | 22 | 31 % | none |
| 4413 | 9 | 9 | 9 | 22 | 31 % | none |
| 4414 | 9 | 9 | 9 | 22 | 31 % | none |
| 4415 | 9 | 9 | 9 | 22 | 31 % | none |
| 4416 | 9 | 9 | 9 | 22 | 31 % | none |
| 4417 | 9 | 9 | 9 | 22 | 31 % | none |
| 4418 | 9 | 9 | 9 | 7/22 | 16% - 31% | none |
| 4419 | 9 | 9 | 9 | 22 | 31 % | none |
| 4420 | 9 | 9 | 9 | 22 | 31 % | none |
| 4421 | 9 | 9 | 9 | 22 | 31 % | none |
| 9401, 9403.30, 9403.40, 9403.50, 9403.60 | 12 | 12 | 12 | 22 | 34 % | none |
| | | | | | | |
| 9406 | 6 | 6 | 6 | 22 | 28 % | none |
| | | | | | | |

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.

* 1995 data. The results of 2002 census will be available in the middle of 2003.