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Netherlands

Solid Wood Products

Sustainably Produced Timber

2007

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Report Highlights:

An estimated 40% of the timber used in the Netherlands is sustainably produced timber, used for applications in the infrastructure industry and some for residential building projects. Industry sources expect that the demand for sustainably produced wood will continue to go up.

Includes PSD Changes: No
Includes Trade Matrix: No
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Introduction

Per year, an estimated 12.5 million M3 rwe (roundwood equivalent) wood and wood products is being used in the Netherlands. In order to meet the demand of the domestic and export markets for wood products, the Dutch industry depends heavily on imports. The construction and, to a lesser extent, the furniture and interior industries together use almost 60%, or almost 7.4 million M3 rwe, of the domestic demand. The remaining is used by the Dutch paper, paperboard and woodpulp industry.

Sustainably Produced Timber

The demand for sustainably produced timber is increasing. Within Europe, the Netherlands (together with the UK and Germany) ranks among the highest in the use for sustainably produced timber. The majority of this timber is used for applications in the infrastructure industry and some for residential building projects. Demand from other industries is picking up as well.

Currently an estimated 40% of the timber used is sustainably produced timber (an estimated 25% originates from sustainably managed forests and another estimated 15% is also accompanied by a Chain of Custody (CoC) certificate). More detailed information on CoC can be found at <http://www.keurhout.nl/english/background.htm>. Industry sources expect that the demand for sustainably produced wood will continue to go up, especially for softwood. The 2006 figures are expected to be published early 2008.

Table 1 gives an overview of the use of sustainably produced timber (including products from certified forests and products with a CoC certificate). Table 2 presents the market shares expressed in percentages.

Table 1: Use of Sustainably Produced Timber, '000 M3 rwe

	FSC	PEFC	MTCC	CSA	SFI	Rest*	Total
With CoC certificate	772	325	1	0	0	8	1,106
From certified forests	233	1,447	21	14	8	120	1,843
Total	1,005	1,772	22	14	8	128	2,949

Source: www.probos.net, FAS/The Hague estimates

*covers Keurhout products and products from certified forests without distinction

Table 2: Use of Sustainably Produced Timber, percentage

	FSC	PEFC	MTCC	CSA	SFI	Rest*	Total
With CoC certificate	10.5	4.4	0	0	0	0.1	15
From certified forests	3.2	19.6	0.3	0.2	0.1	1.6	25
Total	13.6	24.0	0.3	0.2	0.1	1.7	40

Source: www.probos.net, FAS/The Hague estimates

*covers Keurhout products and products from certified forests without distinction

The NTTA is the Netherlands Timber Trade Association. Its members handle an estimated 65% of the timber market. In its Policy Plan 2006-2009, the NTTA describes its two primary goals for timber traded by its members by 2009: 1) certainty about the origins of 100% of the timber and 2) 75% of traded timber originates from demonstrably sustainable forests. For more information on its policy plan can be found at <http://www.vvn.nl/main.php?id=226>.

The Keurhout System

Since the Dutch industry imports from various parts of the world (see Appendix I), products with different certifications sit side by side in the same marketplace. This can make it difficult for buyers to make an informed choice. The Dutch Keurhout ("value wood") system removes confusion by giving the guarantee with one independent and umbrella quality mark that the customer has indeed purchased sustainably produced timber.

The Keurhout system, an initiative from the wood trade and industry, and supported by the Dutch government, was introduced in 1996, coinciding with the formation of the Keurhout Foundation. After the Keurhout Foundation ceased its operations in 2003, the NTTA took over most of its activities under the name Keurhout. A good 4% of sustainably produced timber carries the Keurhout logo. More detailed information on the Keurhout system can be found at <http://www.keurhout.nl/english/index.htm>.

Additional information about the certificates mentioned in above tables can be found in Appendix II.

Contact List

Information on the industry's use of sustainably produced wood is provided by:
Netherlands Timber Trade Association (NTTA)

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Related Reports

Related reports from FAS Post in the European Union:

Country	Title	Date	Report Number
Finland	Solid Wood Products	11/05/2007	FI7004
Sweden	Solid Wood Products	9/28/2007	SW7015
Netherlands	Solid Wood Products	9/25/2007	NL7024
Poland	Solid Wood Products	1/25/2007	PL7005
France	Solid Wood Products	12/28/2006	FR6077
Denmark	Solid Wood Products	12/14/2006	DA6012
Germany	Solid Wood Products	12/14/2006	GM6148
EU-25	EU Procurement Policies Pose Challenges to US Wood Exports	6/21/2006	E36095

The GAIN Reports can be downloaded from the following FAS website:

<http://www.fas.usda.gov/scripts/attacherep/default.asp>

Appendix I

Netherlands Imports of Forest products,
excl. pulp/paper

Partner Country	US Dollars		
	2004	2005	2006
World	2,424,281,550	2,354,857,755	2,914,643,639
Germany	395,359,940	310,916,458	395,383,854
Belgium	342,611,201	355,288,706	385,598,170
Malaysia	164,465,163	165,014,276	239,603,255
Indonesia	148,130,115	179,093,357	230,019,756
Sweden	169,012,618	167,943,804	193,473,336
China	105,313,622	131,397,250	172,531,675
Finland	170,408,147	158,320,872	162,596,247
France	157,047,996	122,946,090	140,439,208
Russia	97,720,542	87,381,096	113,988,213
Brazil	92,606,634	95,938,326	112,652,349
Austria	41,960,857	50,670,593	61,775,199
Canada	45,874,716	42,028,011	57,369,710
Spain	20,321,962	29,093,456	54,632,900
Cameroon	36,005,835	36,469,123	51,748,484
Denmark	40,655,301	43,159,361	47,342,860
Poland	45,379,022	36,457,303	45,177,957
Latvia	22,771,650	22,108,103	36,343,966
United States	30,079,108	28,189,686	32,980,742
Estonia	17,702,847	20,145,489	25,257,943
United Kingdom	24,677,315	20,860,025	24,216,590
Czech Republic	13,733,532	15,918,161	23,267,625
Other	242,443,427	235,518,209	308,243,600

Source : www.gtis.com

Appendix II

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