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Report Highlights:

The forestry sector is an important sector in Romania, the direct and indirect contributions to the wood industry for the economy reaches about 3.5 percent of GDP annually. The export market is the main driver for the wood processing industry, with furniture exports three times larger than furniture imports. Romania’s wood imports grew by 22 percent in 2016 and are forecast to continue the upward trend in 2017. U.S. wood exports to Romania consist mainly of veneer sheets, wood sawn, particle boards, and wooden furniture.

General Information:

Summary

Romania's forestry and wood processing sector development potential is very good, but low productivity and poor infrastructure hinder more rapid progress. Forestry legislation was amended in 2015 and 2016, when the rules for wood tendering were changed and more severe measures against illegal logging were introduced. The debates about the new forestry code in 2015 at the Government and Parliament level brought unpredictability to the industry and subsequent changes in forest utilization led to a deficit in logs. Additionally, prices for raw wood sold on the market by the major player, the National Forestry Administration, put extra pressure on the furniture industry. The industry continued investing in new cost-effective technologies in order to compete with larger world players. Furniture plays a major role in the trade balance, since furniture exports reach about 3.7 percent annually of Romania's total exports.

Area

The total forestry area in Romania covers 6.55 million hectares (HA) per 2015 data, about 27.5 percent of the country's total territory. This rate is lower than the European average of 32 percent. The forest area per inhabitant is 0.32 hectares, which matches the European average of 0.32 HA/inhabitant. In terms of geographical distribution about 60 percent of Romania's forests are located in the mountains, about 34 percent in hilly areas, with the remaining forests in the plains. By species, out of this total area, coniferous trees (spruce, fir, pine) represent about 26 percent, beech trees about 31 percent, oak about 16 percent, other hardwoods 20 percent, and other softwoods 7 percent (Table 1).

Table 1. Forest structure (2011-2015)

Categories of forests and other types of land (000 hectares)	**2011**	**2012**	**2013**	**2014**	**2015**
Total	6,521.8	6,529.1	6,538.5	6,544.6	6,555.1
Forests area	6,364.9	6,372.8	6,380.6	6,387.3	6,398.8
Coniferous	1,948.6	1,944.7	1,936.3	1,929.7	1,930.7
Deciduous	4,416.3	4,428.1	4,444.3	4457.6	4,468.2
Other woodlands	156.9	156.3	157.9	157.3	156.3

Source: National Institute of Statistics

In terms of age, a fifth of the area belongs to the age class of 21-40 years, followed by 61-80 years (about 19 percent), and 41-60 years (about 18 percent). Overall about 60 percent of the forestry area falls into the age classes of between 21 – 80 years. Young forests, aged 0-20 years, account for 11 percent of the total forest area.

Reforestation efforts annually cover around 10-11,000 hectares, which combined with natural forest regeneration, reforest annually about 28-29,000 hectares in total. According to some estimates, Romania has about 2.2 million HA of poor agricultural land which might be targeted for reforestation activities.

In terms of ownership, almost half (48.8 percent) of the forestry area belongs to the Romanian state, around 33.8 percent belongs to private entities, while 17.4 percent is managed by municipalities. The publicly held forests administered by the National Forestry Administration (Romsilva www.rosilva.ro) had fallen from 65 percent of total forests in 2004 to almost 50 percent in 2015, mainly due to forestry sales and restitutions made to former owners, such as private citizens and historical associations.

Legislation for forestry has been subject to frequent amendments in order to respond to various factors such as changes in forestry ownership structure and increasing expectations from civil society on the role forests play. The Forestry Code approved in 2008 was revised in 2015 (http://legislatie.just.ro/Public/DetaliiDocumentAfis/184301). According to this revised code, an economic operator/group of economic operators can buy at auction or via negotiation any wood materials only if it has the capacity to process at least 40 percent of the purchased timber. In addition in order to allow a large range of companies to purchase wood, the law states that an operator/group of economic operators may not acquire or process more than 30 percent of industrial timber placed for auction of each species over a year.

The Forestry Code also includes provisions in regard to superior wood manufacturing and includes measures to support rural development through supporting wood processing in rural areas. Nevertheless, the furniture industry claims these rules are not fully observed. In their view the National Forestry Administration should consider the degree of wood processing and the value added to the local area in terms of social and economic benefits when selecting the winners of public tenders.

The forestry legislation in place (Government Decision 617/2016) states that for 2017 no more than 15 percent of the wood placed for auction by the National Administration Forestry can be finished wood for furniture and firewood purposes. The percentage is set to rise to 20 percent in 2018, but furniture makers find this percentage insufficient for their needs.

Production

The National Forestry Inventory is a research tool developed by the Institute for Research and Development in Forestry (http://www.icas.ro/) to collect, manage and analyze data and information regarding Romania's forest resources. The latest study provided by this institute showed that the total standing forest volume in Romania is 2.221 million cubic meters (m^3). This means a standing forest average of 322 m^3 /HA, which is higher than the EU average of 147 m^3/HA. The annual natural increment of 7.8 m^3/HA exceeds the EU average of 4.4 m^3/HA, per data furnished by the National Forestry Inventory (http://roifn.ro). The total standing forest volume consists of the following species: coniferous (31 percent), beech (39 percent), oak (14 percent) and various other species (16 percent).

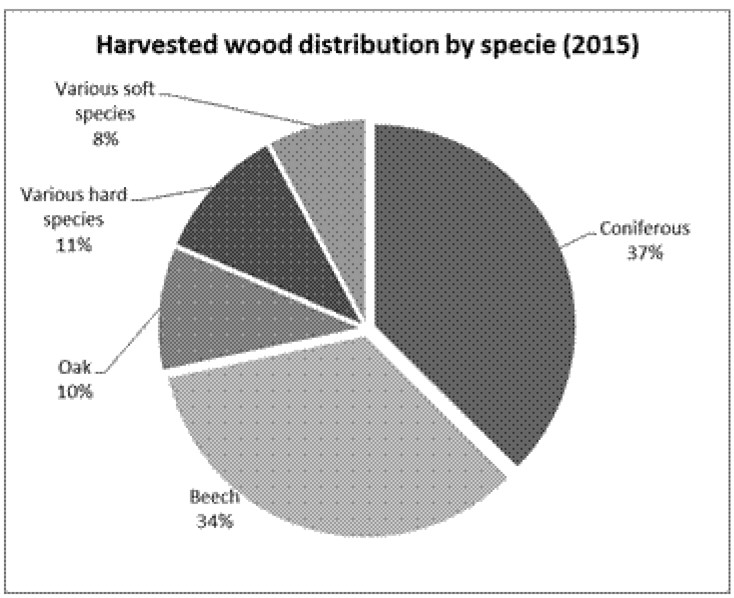
Annual wood harvesting volume is relatively stable from one year to another (Table 2). Out of the total round wood volume, in 2015 the largest percentage was for logs (56 percent), followed by fire wood (33 percent), with the balance for other types of round wood. Round wood is mostly utilized domestically. The largest share of harvested wood comes from the north eastern part of Romania with 26 percent, followed by the central part with 22 percent, and the west and north west each with 12 percent.

Table 2. Harvested Wood Volume in Romania

Species (000 cubic meters)	2011	2012	2013	2014	2015
Total, of which	**18,705.0**	**19,081,2**	**19,282.1**	**17,889.3**	**18,133.1**
Coniferous	7,521.2	7,615.1	7,921.8	7,225.0	6,782.2
Beech	6,174.9	6,332.1	6,226.5	5,836.6	6,215.5
Oak	1,747.2	1,687.1	1,741.6	1,664.1	1,768.6
Various hardwoods	1,946.3	2,014.4	1,968.9	1,876.0	1,950.6
Various softwoods	1,315.4	1,432.5	1,423.3	1,287.6	1,416.2

Source: National Institute of Statistics

The volume of harvested wood grew from 16.5 million cubic meters in 2009 to 18.7 million cubic meters in 2011, but dropped to 18.1 million cubic meters in 2015. In terms of species in 2015, coniferous species (fir, spruce, pine) represented about 37 percent, followed by beech, oak, various hardwood species (hornbeam, acacia, sycamore, birch) and softwoods (poplar, willow, lime) (graph below). As mentioned above, the National Forestry Administration is the main company marketing wood in Romania and is the main supplier to wood processing facilities. In 2015 the National Forestry Administration sold 8.97 million cubic meters of timber, as standing timber (72 percent), to third party operators (10 percent), or for self-cutting (18 percent).



Source: National Institute of Statistics

Prices

Domestic wood prices are set by the National Forestry Administration, as the major wood supplier. The National Forestry Administration organizes tender sessions for standing timber to be removed in the following year and establishes a minimum starting price. The rules set in 2015 for wood sales from publicly administered forests did not satisfy the wood processing and furniture industry. Prices grew substantially by several percentage points to double the previous years' prices in some areas. Following discussion between the furniture industry and legislators, a new regulation was approved in September 2016 setting new rules for organizing wood sales (Government Decision 617/2016 for approving the procedure to sell the wood from public forests).

The revised system is still highly criticized by industry operators, who claim that the system's raw wood selling prices exceed world market prices, putting their furniture industry at risk of being unable to satisfy export demand. In 2015 the opening price for wood was 121.3 RON/m^3 (U.S. \$30/m^3) and the final price was 26 percent higher (U.S. \$38/m^3). The final price for the wood offered by the National Forestry Administration to be harvested in 2017 reached U.S. \$46/m^3, 7 percent higher than the price offered during the spring of 2016 (U.S. \$42/m^3). The volume offered for sale in 2017 was 12 percent lower, which along with the gap of 30 percent between the opening price, and the tendering price reflect a stressed market place. Analysts expect the market will remain under pressure due to the limited wood volume placed for harvest for both processing and firewood as a result of the price differential from world prices.

Illegal logging

Illegal logging represents a real threat to Romanian forestry. Economic and social changes and the continuing restitution process of forests to their historical owners, in the absence of adequate measures to offset the effects, place additional pressure on forests.

A report on this subject issued by the Ministry of Environment, Water and Forests in 2016 cites several factors which favor or contribute to illegal logging. One of the reasons for illegal cutting was illegal forest restitution. Inadequate legislation and inaccurate interpretation of the laws allowed "presumed" owners gain forest ownership rights, sometimes on forged ownership documents or inheritance papers.

Inadequate forest policies is another reason for uncontrolled forest cutting. Underfunded forest management, a lack of guidance provided to private forest owners, a lack of funding to support protection of forests in areas smaller than 100 hectares, or guarding for forested areas less than 30 hectares, all helped to increase illegal logging.

The deterioration of the economic and social environment in certain rural areas led to rising unemployment. Populations living in these areas had to generate some income, and the forest was one of the sources. Furthermore, the length of the judicial process in solving ownership disputes of the forest and wood processors' flexibility in accepting illegally logged wood were two other factors cited by the report for illegal logging.

Over time official authorities took up various approaches to ensure wood traceability and to mitigate illegal logging. According to the National Forestry Inventory, illegal cutting dropped in 2015 in both public and privately owned forests. In its view this is the result of the implementation of EU legislation in regard to obligations assumed by wood business operators and the implementation of measures to strengthen local monitoring capacity, such as the electronic system for monitoring wood material and Forest Guards. In 2016 a new public platform called "the forest inspector" (http://www.inspectorulpadurii.ro/) was created. This alert system enables authorities to monitor in real time any alteration on the forested areas and detect illegal cuttings. The Ministry of Environment and

Forests is hopeful that this new platform, along with high penalties and sanctions, will help them mitigate illegal forest exploitation.

Forest Certification

Forest certification is a voluntary process conducted at the request of the forest owner. The forest certificate attests that the wood products originate from forests which fulfilled certain economic, social and environmental criteria. According to the National Forestry Administration, the major forest owner, about 2.3 million hectares, or about 35 percent of total forestry area, is certified according to the Forest Stewardship Council (FSC) standards (https://ic.fsc.org/en/about-fsc). Considering the clear orientation of this industry to the export market, where forest certification is mandatory, it is expected that this certification process will accelerate in the upcoming years.

Market Analysis

The sector is viewed as having tremendous opportunities for future development. According to a study published by PricewaterhouseCoopers (PwC) in October 2016, the forestry and wood processing sector hires directly about 128,000 employees and another 186,000 employees in adjacent sectors. Over the past three years investments in wood processing grew steadily, from U.S. $204 million in 2013 to U.S. $222 million in 2015, per available figures from the National Institute of Statistics. Despite these investments labor productivity in this sector remains only half of the EU average level, and is due to poor forest transport infrastructure and outdated harvesting technology. The poor infrastructure (lack of roads, cableways and railways) typically limits the amount harvested at lower levels and leads to over logging in the easily reachable areas. In addition Government forestry management capacity is 2.4 times lower than the EU average, since one Government employee manages about 263 hectares as compared to the 632 hectares managed in the EU on average.

The timber industry is very important to Romania’s rural economy. The sector is viewed to have opportunities to compete in the global market place. Raw material availability (including multiple wood varieties appreciated in international markets, especially Europe and the U.S.), the still low labor costs, and geographical proximity to Western customers are the keys to its potential development. Table 3 below provides the latest figures on timber production in Romania, showing the clear predominance of coniferous timber (78 percent). Apart from coniferous and beech wood families, furniture makers use valuable species such as oak, cherry trees, elm trees, sycamore and ash trees.

Table 3. Romanian Timber Production (cubic meters)

	2011	2012	2013	2014	2015
Total timber, of which	5,144,917	5,174,965	5,835,732	5,909,161	5,867,947
Coniferous timber	4,147,920	4,175,364	4,747,341	4,807,268	4,599,709
Beech timber	690,677	702,269	793,682	819,485	932,814
Oak timber	242,322	240,420	239,909	219,170	254,730

Source: National Institute of Statistics

Trade in wood products

Romania has a trade surplus in wood and articles of wood with the world in both value and volume terms. The unpredictability in the industry that was installed during the debate about the new Forestry Code in 2015 and the subsequent change in forests' utilization led to a deficit in logs and a rise in prices as well as a drop in exports.

During 2013-2015 wood imports grew steadily. The changes in domestic legislation adopted in 2015 and the pressure exerted by Green organizations on wood processors concerning origin of sawn wood resulted in an import surge of 22 percent in 2016 compared to the previous year in value terms. Wood in the rough imports surged by 34 percent in 2015 and 7 percent during the first ten months of 2016.

Wood fiberboard accounts for the highest percentage among wood products, with a share of 21 percent in 2016 (Appendix 1 Table 1). Wood in the rough ranked second with a share of 17 percent in 2016, while builders' joinery followed with 14 percent. Wood sawn or chipped accounted for 12 percent in 2016. Other elements such as particle board, plywood, veneered panels and veneer sheets have smaller shares. The major wood supplier is Ukraine due to proximity and forest resources availability, followed at a distance by Poland, Germany and China (Appendix 1 Table 2).

In terms of wood exports, Romanian wood reaches every corner of the world. In 2016 Romania exported some type of wood to approximately 120 countries, but wood exports have been on a downward trend from their peak in 2013. Overall wood exports fell by 19 percent in 2015 and about 10 percent during the first ten months of 2016. This trend reflects the lower wood volumes available for cutting after the high pressure exerted by Green organizations on wood processors and an increase in domestic demand. Romania's main markets for wood products are equally the EU and third countries in terms of value, but are predominantly non-EU members such as Turkey, Egypt, China, United Arab Emirates, Japan, Lebanon, and South Korea in terms of volume (Appendix 1 Table 3).

The United States has a trade deficit with Romania in regard to wood products in direct exports. In general Romania imports veneer sheets, wood sawn, and wood packing products from the United States. Wood sawn ranks first among wood exports to United States, followed by plywood veneered panels, builders' joinery, and tableware.

Furniture and interiors market

In 2016 the furniture production in value terms reached an estimated U.S. $2.65 billion, representing approximately 7 percent growth as compared to the previous year. The domestic furniture market surged by 12 percent in 2016 and reached nearly U.S. $1 billion. Imports covered more than half of the domestic consumption.

According to data published by the furniture producers association, there were approximately 4,500 companies in 2014 producing furniture, of which about 3,000 were active. The sector employed on average 61,500 employees in 2016. Over the past 10 years the domestic wood resources and processing capacities attracted large international furniture players. Investment volume grew steadily from U.S. $85 million in 2012 to U.S. $100 million in 2014 and U.S. $115 million in 2015, enabling furniture producers to meet increasingly refined consumer tastes. Constant investments in the furniture industry helped the sector continue the positive dynamics in 2016 despite the raw wood crisis.

The limited availability of the workforce represents another constraint for the furniture sector apart from the price of wood material. In general the wage level in this sector is 30 percent lower than the average in the economy elsewhere and lower compared to other sectors such as construction and retail but similar food industry and food service. This difference led to workforce migration to other sectors or to the other EU countries during the past 5-10 years. Therefore, furniture makes must be creative and find a means to attract workers to this sector, such as higher salaries, provision of local transportation, relocation packages, and training sessions in order to gain more workers to support the rising personnel demand.

Romania has a positive balance in furniture trade as observed in the Table 4 below. Romanian furniture is strongly oriented towards export, with roughly 85 percent of furniture production going to foreign markets. High-value furniture items are exported, with EU being the destination for a large part of this segment of furniture. Two fifths of Romanian furniture exports reach Germany and France. Other major markets are Italy, United Kingdom, Czech Republic, and the Netherlands (Appendix Table 4).

Table 4. Romania Furniture Trade

U.S. $ Million	Years				Year To Date		
	2012	2013	2014	2015	10/2015	10/2016	%Change
Exports	1,775	2,129	2,429	2,202	1,851	1,981	7
Imports	429	496	556	531	431	524	22

Source: Global Trade Atlas

Furniture import value dropped in 2015 by 4.4 percent compared to the previous year, but it rose by 22 percent in the first ten months of 2016. The main suppliers are Poland and China for more affordable priced products, and Germany and Italy for high-end products. The structure of furniture imports is dominated by finished furniture, such as living or dining room, bedroom or office furnishings with a share of 51 percent, followed by seats with 38 percent, and mattress support (Appendix Table 5).

The United States has a small, but increasing share in furniture imports. In 2015 furniture imports from the United States reached U.S. $1 million, which was an increase of 28 percent compared to the previous year. The positive trend continued in 2016 when imports doubled from U.S. $0.9 million to U.S. $1.8 million during January – October 2016. Chairs represent the largest item category imported from the United States.

In terms of furniture marketing channels, there are three major categories of stores which sell furniture: specialized stores (bedroom furniture, living furniture, or bathroom furniture), the second type is stores offering a much larger portfolio of items while the third category is taken by retail and do-it-yourself chains, which are able to offer large volumes from foreign partners.

Furniture producers expect that the sector will continue to grow moderately in 2017. The success of this industry will depend on the ability of the furniture producers in adapting their offer to consumer tastes in terms of both prices and design.

Construction market

The furniture market is influenced by the dynamics of the construction sector. According to the latest figures provided by the National Institute of Statistics, the construction market fell in 2016 by 4.8 percent compared to the previous year, when it surged by 10 percent. The market is currently estimated at U.S. $18 billion. Per the estimates of the Eastern European Construction Forecasting Association (EECFA), the construction market is forecast to recover in 2017 and see an increase of 5.2 percent. The driving forces for this growth will be positive developments in the residential and non-residential segments. Limited growth is expected in civil engineering due to delays in public tenders for infrastructure projects funded from the European Union (EU). In 2016 the residential and civil engineering (roads, bridges, highways) segments accounted each for about 38 percent of the total construction market. The non-residential segment covers the balance of 24 percent.

Office space remains a very dynamic segment. In 2016 an area of 280,000 sqm of office space was delivered, which is triple the volume compared to the total volume delivered during the past three years in total (2013-2015). Analysts remain optimistic in regard to the developments for the current year. As the capital city, Bucharest remains the main pole of attraction for construction of new commercial space, but smaller cities have become increasingly attractive for investors as well. New office space will increase pressure on owners of existing space and prompt them to show flexibility in terms of lease contract provisions and boost willingness to renovate and redesign old space in order to compete.

The residential market has been steadily growing. In 2015 Romania had 448 dwellings per 1,000 inhabitants as compared to 433 dwellings per 1,000 inhabitants five years earlier. That is due to both an increase in the number of dwellings and a reduction in number of inhabitants. Industry analysts estimate an increase of 20 percent in the number of dwellings finalized in 2016 compared to the previous year. The capital city of Bucharest and its suburbs account for nearly half of the number of new dwellings (43 percent) built in 2016. In the most recent years, real estate developers started targeting the lower to middle-income population rather than building luxurious houses. In 2016 about 40 percent of the number of residential projects targeted the middle-income class.

Overall the construction sector is continuing the recovery process. As mentioned above the growth is supported by the demand for both residential and non-residential space. The rate of growth will accelerate when large infrastructure projects are launched in the future.

Appendix 1

Table 1. Romania Import Statistics (U.S. $)
Commodity: 44, Wood And Articles Of Wood; Wood Charcoal by type

	Description	Years			Year To Date		
		2013	2014	2015	10/2015	10/2016	% Change
44	Wood And Articles Of Wood; Wood Charcoal	509,704,062	575,463,860	581,645,500	487,307,072	595,355,659	22.17

4411	Fiberboard Of Wood Or Other Ligneous Materials	125,845,831	135,833,158	127,981,253	108,308,614	125,720,503	16.08
4403	Wood In The Rough, Stripped Or Not Of Sapwood	59,673,752	85,903,571	114,358,410	97,017,105	103,479,569	6.66
4418	Builders' Joinery And Carpentry Of Wood	69,135,354	79,016,353	83,172,777	69,762,680	81,211,300	16.41
4407	Wood Sawn Or Chipped Length, Sliced Etc, Ov6Mm Th	32,812,520	38,427,218	43,697,326	33,611,642	70,500,558	109.75
4410	Particle Board & Similar Board Of Wood Etc.	39,488,135	42,615,573	39,722,212	32,349,454	47,925,595	48.15
4412	Plywood, Veneered Panels & Similar Laminated Wood	31,352,292	38,318,349	35,009,547	30,192,720	30,742,402	1.82
4408	Veneer Sheets Etc, Not Over 6 Mm Thick	32,510,908	34,781,776	34,285,338	30,305,011	25,164,356	-16.96
44MM	Intra-Comm. Trade Broken Down At Chapter Lev. Only	24,670,972	29,984,243	24,348,509	20,602,902	28,599,096	39
4415	Packings Etc, Wood; Pallets, Collars Etc, Of Wood	25,064,117	24,986,301	21,995,131	18,064,254	20,973,888	16
4401	Fuel Wood In Logs Etc; Wood In Chips, Etc.	24,793,018	23,708,822	15,596,430	12,231,504	18,407,363	50
4421	Articles Of Wood, Nesoi	15,604,647	13,828,707	14,872,982	12,629,357	14,377,265	14
4409	Wood, Continuously Shaped (Tongued, Grooved Etc.)	14,956,734	15,762,861	14,096,421	12,052,262	11,965,792	(1)
4419	Tableware And Kitchenware, Of Wood	2,957,254	3,175,018	2,923,570	2,360,636	3,433,979	45.47
4420	Wood Marquetry Etc; Jewel Case Etc & Wd Furn Nesoi	1,786,495	2,265,536	2,627,969	2,139,332	2,136,837	-0.12
4414	Wooden Frames Paintings, Photographs, Mirrors, Etc	3,178,593	1,526,919	1,265,443	1,002,473	1,861,988	85.74
4413	Densified Wd Blocks/Plates/Strips/Profile Shapes	1,606,915	1,430,240	1,248,537	1,089,295	1,894,361	73.91
4417	Tools/Tool & Broom Bodies Etc Shoe Last/Trees Wood	1,283,860	1,533,420	1,181,993	1,033,375	1,159,838	12.24
4402	Wood Charcoal, Whether Or Not Agglomerated	351,671	342,693	1,172,284	752,146	4,136,539	449.96
4406	Railway Or Tramway Sleepers (Cross-Ties) Of Wood	1,271,619	853,373	781,523	693,646	375,571	-45.86
4404	Hoopwood; Split Poles; Pickets And Stakes Etc	424,961	473,093	642,217	490,122	423,312	-13.63
4416	Casks, Barrels, Vats, Etc. And Parts, Of Wood	887,522	614,001	590,201	548,232	656,312	19.71
4405	Wood Wool (Excelsior); Wood Flour	46,891	82,633	75,426	70,309	209,235	197.59

Source: Global Trade Atlas

Table 2. Romania Import Statistics (U.S. $)
Commodity: 44, Wood And Articles Of Wood; Wood Charcoal

Partner Country	Years				Year To Date		
	2012	2013	2014	2015	10/2015	10/2016	%Change

World, of which	469,895,882	509,704,062	575,463,860	581,645,500	487,307,072	595,355,659	22
Ukraine	77,495,351	92,221,177	118,788,816	146,893,815	121,969,849	142,678,471	17
Poland	44,413,555	54,085,731	64,385,960	74,695,187	63,915,078	85,206,897	33
Germany	75,978,686	86,385,041	88,867,922	74,340,489	62,322,133	74,488,630	20
China	56,053,399	55,344,213	62,247,062	54,891,096	46,437,729	49,796,425	7
Hungary	37,808,203	38,150,263	40,300,485	37,413,511	30,917,288	38,644,929	25
Italy	38,421,014	35,019,062	34,394,529	31,761,352	26,588,829	26,372,137	(1)
Austria	33,204,241	35,782,342	33,611,061	30,070,897	24,812,684	29,062,603	17
Belarus	4,934,424	6,073,421	7,488,211	12,756,639	10,086,848	23,685,047	135
Turkey	5,198,483	5,770,475	9,291,079	11,068,609	9,034,890	12,056,435	33
Belgium	7,259,871	7,393,211	9,659,776	9,189,383	7,912,358	9,544,422	21
Czech Republic	7,550,336	7,189,686	9,683,298	8,460,037	6,974,719	7,956,017	14
Cote d Ivoire	5,881,791	5,738,829	6,960,132	8,429,558	7,793,562	4,536,826	(42)
Bulgaria	14,336,494	7,531,696	9,428,126	7,945,485	6,504,761	6,858,867	5
Slovenia	6,187,920	6,866,696	9,088,421	7,939,699	6,660,313	6,476,583	(3)
France	7,445,749	9,250,533	8,240,996	6,359,532	5,578,316	6,624,992	19
Serbia	3,302,416	3,379,949	5,428,954	6,352,588	5,229,152	8,563,718	64
Sweden	5,102,263	7,184,749	8,420,373	6,216,493	5,266,818	4,213,181	(20)
Russia	2,272,300	3,730,299	4,080,070	5,483,248	4,038,196	18,287,248	353

Source: Global Trade Atlas

Table 3. Romania Export Statistics (U.S. $)

Commodity: 44, Wood And Articles Of Wood; Wood Charcoal

Partner Country	Years				Year To Date		
	2012	2013	2014	2015	10/2015	10/2016	%Change
World, of which	2,070,064,137	2,496,659,154	2,472,804,647	2,008,269,116	1,717,078,593	1,545,885,393	-9.97
Italy	210,898,074	247,687,277	247,151,999	194,288,561	166,839,686	164,801,265	-1.22
Japan	179,417,756	235,155,190	208,634,801	164,216,607	138,889,944	149,467,374	7.62
Egypt	146,974,733	117,923,945	131,419,169	139,860,897	120,875,042	71,381,727	-40.95
China	96,158,333	157,432,422	158,252,715	138,542,365	122,379,072	110,507,046	-9.7
Turkey	177,386,727	174,150,490	154,455,102	134,095,430	111,475,796	72,325,276	-35.12
Germany	131,094,870	154,784,264	149,179,234	123,491,510	105,743,445	104,942,901	-0.76
Austria	117,419,957	154,070,996	141,743,853	94,212,497	82,241,870	55,905,317	-32.02
United Arab Emirates	67,086,870	77,877,928	95,119,997	71,163,819	59,172,692	51,715,127	-12.6
Hungary	56,205,769	77,044,566	83,799,071	70,341,878	59,909,149	65,093,832	8.65
France	68,691,056	75,004,496	85,800,306	63,495,631	54,778,106	51,048,220	-6.81
Saudi Arabia	85,330,658	80,877,064	76,193,278	63,443,452	54,614,608	35,567,822	-34.87
Poland	55,354,316	74,125,252	75,207,614	63,300,356	55,813,175	44,998,039	-19.38
Lebanon	42,617,382	39,827,256	48,567,053	40,062,346	32,414,755	32,979,210	1.74
Greece	35,055,335	45,340,647	43,389,973	38,814,062	31,781,241	32,632,690	2.68
Bulgaria	30,298,767	36,789,048	41,770,776	37,143,788	31,738,937	35,848,015	12.95
United States	5,596,899	14,865,776	19,455,745	34,205,389	30,698,487	18,236,456	-40.59
Korea, South	37,831,179	35,371,604	27,417,659	32,889,465	31,437,816	22,577,867	-28.18
United Kingdo	26,475,021	32,321,489	32,081,708	31,609,705	27,236,070	28,858,300	5.96

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Israel	25,511,070	38,105,381	37,022,784	28,138,042	24,228,800	18,381,296	-24.13
Serbia	21,408,842	28,770,533	36,758,647	28,084,559	23,309,782	32,896,424	41.13
Sweden	13,228,726	25,379,225	30,293,116	26,103,720	22,260,673	33,169,727	49.01
Spain	22,995,712	30,593,225	24,950,163	25,306,389	21,168,768	21,372,442	0.96

Source: Global Trade Atlas

Table 4. Romania Export Statistics (U.S. $)
Commodity: Furniture, Furniture 9401, 9403, 9404

Partner Country	Years			Year To Date		
	2013	2014	2015	10/2015	10/2016	%Change
World, of which	2,129,091,731	2,429,228,220	2,202,112,508	1,850,717,212	1,980,811,140	7
Germany	464,649,830	495,298,298	435,042,276	367,648,051	391,142,858	6
France	293,773,141	329,298,604	297,780,719	244,795,903	292,567,387	20
Italy	194,553,013	243,941,122	245,157,273	205,124,226	225,979,424	10
United Kingdom	165,417,506	194,890,463	171,432,233	144,437,364	132,442,607	(8)
Czech Republic	96,649,271	147,632,417	163,605,437	135,562,184	160,507,917	18
Netherlands	114,283,284	132,644,574	117,109,774	98,434,805	105,743,536	7
Austria	86,049,258	118,641,786	100,291,535	85,521,321	74,555,933	(13)
Belgium	91,129,436	92,078,624	70,173,393	59,440,922	59,110,078	(1)
Spain	65,758,190	78,008,878	67,981,619	57,547,397	58,567,972	2
Hungary	54,654,625	59,177,390	60,776,903	52,769,490	37,425,031	(29)
Sweden	49,885,998	45,628,736	52,141,781	44,291,454	52,978,786	20
Poland	43,730,784	57,713,239	48,877,507	41,777,334	36,101,900	(14)
United States	32,903,905	41,629,577	44,665,397	36,579,754	44,833,213	23
Slovakia	42,735,764	45,927,386	43,002,454	35,929,394	47,927,001	33
Switzerland	36,276,548	36,251,053	32,752,104	27,281,497	28,309,721	4
Serbia	40,221,899	34,850,374	27,474,938	23,891,965	22,119,019	(7)
Russia	59,929,227	48,227,950	22,569,707	19,089,817	10,054,618	(47)
Slovenia	9,092,532	14,413,973	16,163,605	13,703,225	13,287,659	(3)
Portugal	21,193,250	26,487,258	13,666,253	12,895,676	11,811,497	(8)
United Arab Emirates	13,673,983	14,035,423	13,141,928	11,051,197	17,621,948	59
China	7,304,198	10,747,428	12,343,407	10,522,799	13,366,239	27

Source: Global Trade Atlas

Table 5. Romania Import Statistics (U.S. $)
Commodity: Furniture, Furniture 9401, 9403, 9404

Partner Country	Years			Year To Date		
	2013	2014	2015	10/2015	10/2016	%Change
World, of which	496,382,978	552,569,844	530,972,409	430,069,771	524,344,804	22
Poland	90,714,112	104,107,045	125,900,231	100,413,925	130,938,394	30
Germany	68,710,302	77,269,728	58,040,737	45,517,467	54,329,117	19
Italy	66,020,294	63,215,676	57,479,208	45,935,322	47,017,865	2
China	50,706,996	62,797,169	54,985,422	46,479,725	58,219,493	25
Turkey	28,125,112	46,390,732	36,761,455	29,438,887	38,855,095	32
Hungary	42,753,330	37,431,225	31,456,092	26,236,372	44,867,596	71
Serbia	11,609,658	15,610,923	16,095,654	12,011,306	15,644,445	30
Macedonia	6,650,298	4,195,966	14,486,609	11,666,187	2,773,800	(76)
South Africa	935,047	11,576,153	12,800,078	10,788,389	7,732,540	(28)

France	18,961,961	15,560,160	12,155,883	9,883,532	10,466,529	6
Bulgaria	5,817,650	9,018,138	10,562,814	8,055,398	9,699,864	20
Czech Republic	7,104,489	10,900,149	10,386,641	8,087,727	9,515,190	18
Spain	7,635,391	8,420,933	9,147,059	8,124,062	7,121,399	(12)
Moldova	8,377,026	8,383,991	8,856,072	7,044,346	9,440,416	34
Austria	11,441,582	9,359,688	8,274,740	6,431,933	6,474,678	1
Slovakia	11,313,527	11,317,608	7,437,801	6,400,049	9,031,079	41
Netherlands	5,990,731	5,231,714	6,351,003	5,357,391	7,297,853	36
Belgium	5,759,656	6,703,659	6,301,371	5,447,365	5,007,351	(8)
Greece	4,235,829	3,709,220	4,256,021	4,065,209	1,745,495	(57)
Portugal	5,630,550	3,951,414	3,529,740	3,350,905	2,846,224	(15)
United Kingdom	2,378,246	2,722,553	3,518,952	2,869,777	4,497,313	57

Source: Global Trade Atlas

Appendix 2

List of wood processors, imports and furniture manufacturers

Members of the organization Romanian Furniture Producers Association

http://www.apmob.ro/catalog.html

Bedroom Furniture Manufacturers Directory

http://www.apmob.ro/en/bedroom.html

Wood processors – includes importers

http://www.apmob.ro/materiale.html

Wood and wooden articles traders

http://www.apmob.ro/comert.html

End of the report.