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Wood Products Sector Update

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Report Highlights:

The Bulgarian forest sector has developed successfully in the last five years with growing timber production and stock, increased forest certification, introduction of more efficient and transparent trade mechanisms (electronic public timber tenders) and reforms addressing illegal logging and improving timber traceability.

Due to environmental, infrastructural and economic challenges, the supply of high quality hardwood is limited, followed by certain types of softwood. A thriving furniture sector demands more and better quality raw materials to meet the consumption of furniture makers, especially those targeting export markets. As a result, hardwood imports have skyrocketed and in 2016 (as of September) it was 35% more than in the previous year. Furniture exports have continued to expand and in 2016 (September) were 13% more vs. 2015.

General Information:
Overview of the Forest Sector

Forest Land

Forestry has long traditions in the country and plays an important economic, environmental and social role. Bulgaria has diverse terrain and several mountains which are the main source of timber. The country is the third richest in biodiversity in Europe and forests have increasingly important environmental and recreational role.

Total forest land in Bulgaria is 4.22 MHA and it covers 37% of the country's territory. The latest inventory shows that forests cover 3.84 MHA or 91% of total forest land (source: Agrarian Report, Ministry of Agriculture, 2016). Forests account for 31% of the national territory which ranks Bulgaria 19th in Europe. The forest land has grown and in 2015 it was 8% more than in 2000 (3.91 MHA) and 18% more than 1985. In 2016 the forest land increased by 21,000 HA compared to 2015 due to self-afforested agricultural areas which were qualified as forests.

At the end of 2015 the European ecological network Natura 2000 covered 4.1 MHA or 34% of the country's territory, third in Europe after Slovenia (35.5%) and Croatia (34.8%). Natura 2000 includes 1,012 protected territories of which 90 reservations, 3 national parks, and 11 natural parks. About 48% of the forest territories (2.0 MHA) are in Natura 2000 which are subject to special timber harvesting rules.

Forests are divided in two major categories - first, timber producing forests with 1.59 MHA (38%); and second, the protective, recreational and in protected territories forests with 2.63 MHA (62%). The lower share of timber producing forests on the expense of expanding recreational/protected forests has reduced the potential for more intensive timber production and made sourcing of local timber more challenging and expensive.

Forests are traditionally owned mainly by the state. Privatization was completed several years ago. As of 2016 about 73% of forests are state forests, 13% are municipal forests, and 11% are in private hands.

Forest Characteristics

The timber-line reaches 2,200 meters above sea-level. The deciduous forests today are 69% of the total forests vs. coniferous forests at 31% compared to 67% vs 33% 15 years ago.
Forests with one dominating tree species are 46%, followed by mixed forests (5-6 tree species) at 44% and forests with 2-3 tree species at 10%.

Oak forests rise up to 1,200 m altitude, beech forests rise up to 1,600 m and the coniferous stretches up to 2,200 m. Among coniferous the most economically important are White Pine (Pinus Sylvestris) at 15%, Scotch Pine at 16%, Black Pine (Pinus Nigra) at 8%, Norway Spruce (Picea Excelsa) at 4%, Fir Tree (Abies Alba) at 1%, and the Balkan Pine (Pinus peuce). The deciduous forests are composed of

Beech (Fagus Sylvatica) at 17%, Oak (Quercus spp.) at 23%, Turkey Oak (9%), Poplar (Populus spp), Ash-tree (Fraxinus spp.) and other.

A study published in 2016 (Forest Magazine, October 2016) showed the dynamics of changes in the forest structure in the period 1985-2015. The coniferous forests declined from 1.2 MHA to 1.05 MHA including the White Pine whose area decreased from 569,800 HA to 553,612 HA. Deciduous forests' area grew: beech's area from 546,000 HA to 621,000 HA, and oak's area from 798,000 HA to 955,078 HA in 2015. Mixed forests area increased by 22% for this period to reach 1.9 MHA and in 2015 it accounted for 44% of all forested land.

The average age of forests is 57 years. The average age of coniferous forests in 2015 was 54 years, deciduous high-stalk forests age was 81 years and deciduous low-stalk forests was 36 years. For coniferous forests, the highest was the share of 21-40 years age, 42%, while the share of coniferous forests of age above 80 years was 20%.

Timber Stock

The annual increment [1] of Bulgarian forests is 14.4 million m^3 or 3.86 m^3 per hectare compared to 4.7 m^3/HA for the EU. The annual increment per hectare for coniferous forests is 6.2 m^3/HA compared to 3.7 m^3 for deciduous forests.

The total timber volume (stock) is 680 million m^3 (2015) or average 177 m^3/HA ranging from 50 m^3 to 1,200 m^3/HA. The average timber volume per hectare is above that in the EU (105 m^3/HA) and in the world (130 m^3). This index has grown for coniferous forests more than for deciduous forests. In 2015 timber volume was 29% more than in 2000 (526 million m^3) and 202% more than in 1985. About 42% of total timber volume is concentrated in the category of protective, recreational and in protected territories forests.

[1] Note: The Annual Increment is the volume of wood growing on one hectare of forest during one year (m^3/ha/year) on average since the forest has been established.

Timber Harvesting and Wood Production

Timber harvesting is carried out through three major types of cuttings: thinning, regeneration, and selective. Clear cutting is not practiced in the country. Bulgaria, unlike some other countries [2] in the region, does not have a history of overcutting forests. The public is highly sensitive on this issue and foresters usually adopt stringent sylviculture norms.

Illegal cutting has been a challenge and a number of control mechanisms have been introduced to address the problem in the last five years. Currently illegal cutting is estimated to account for 10% to 20% of timber production in various forest regions, which generates grey trade and undermines timber prices.

The forest roads network is not very well developed or maintained. Per World Bank information, there are 28,000 km forest roads with an average density of 7.9 m/HA. This is comparable to Romania but considerably lower than in other EU countries (Austria 36 m/HA, France 26 m/HA, Germany 45 m/HA). Due to underdeveloped infrastructure, some forests remain non-harvested/ less harvested while other forests which are easier to access tend to be overharvested and/or subject to illegal cutting.

Timber harvesting is labor intensive due the mountainous terrain, lack of developed logging infrastructure, and low levels of modern logging equipment use. On this index (annual work units per 1,000 hectares forest land), Bulgaria is in one group with countries such as Romania, Czech Republic, and Croatia. Logging companies are usually small/medium sized, use outdated logging equipment and transportation and have a limited ability for new investments. In the last 3-4 years, several larger companies made investments in advanced logging technology and the current prospects are for gradual improvements.

Annual timber harvesting is usually lower than the annual increment, at 50% - 65% of the annual growth. This ranks Bulgaria among countries in the EU with lower percentage of this index along with Italy, Slovenia, Greece, Estonia, Germany, Spain, and Slovakia. This is due to complex environmental and nature-protective reasons related to management of forests with specialty functions, and partly due to infrastructural and technological weaknesses. On the other hand, it opens an opportunity for a growth of timber harvesting in the future.

Over the last ten years the annual timber production varied between 6 million m^3 and 8 million m^3 standing timber. Usually 4.6 - 5.6 million m^3 of timber is produced by state farms, 550,000 to 730,000 m^3 by municipal forests, and 900,000 to 1.4 million m^3 by private forests.

In 2015 the annual harvesting was at 8.4 million m^3 (standing timber) which was 99% of the annual forest management plan (8.46 million m^3). This was 67% of the annual increment of 14.1 million m^3. Production was 15% more than in 2014 (7.3 million m^3), see Table 1.

Out of total harvested timber in 2015, 4.0 million m^3 were provided through regeneration cutting (48%) and 4.4 million m^3 through thinning cutting (52%). Usually, about 50%-60% of timber harvesting comes from regeneration cutting and 40%-50% from thinning.

Table 1. Timber Harvesting in 2014

Timber Harvesting in 2014							
Ownership	**Timber Harvest, m^3**			**Area, HA**			
	Harvested	**Planned**	**%**	**Total**	**%**	**Forests**	**%**
State (public)	5,493,341	6,426,068	85.5%	3,151,073	75.0	2,842,400	74.1
Municipal	760,733	1,072,338	70.9	553,189	13.2	517,579	13.5
Private, physical persons	883,008	665,930	132.6%	434,822	10.3	418,867	10.9
Private, corporate	62,914	58,664	107.2%	40,711	1.0	37,530	1.0
Church	27,119	30,812	88.0%	22,220	0.5	19,529	0.5
Total	7,281,587	8,331,212	87.4%	4,202,015	100	3,835,905	100
Source: MinAg data							

Timber is sold through sales of standing timber or through tenders for already harvested timber. Sales of standing timber can be in three forms: through sales for individual use to physical persons; through tenders to companies and through sales to forest sector's employees. In 2015, 51% of timber sales were carried out through sales of harvested timber (2.55 million m³) and 49% through sales of standing timber (2.51 million m³).

Total sales of timber from all categories of forest land in 2015 were at 6.9 million m³ or 88% of the annual plan. The state forest enterprises sold 5.14 million m³ of timber or 106% of its planned quantity compared to 4.6 million m³ produced in 2014 or 12% more than in the previous year. Municipal forest produced 820 000 m³ or 85% of their plan and private forests produced 970 000 m³ or 50% above their annual plan. Timber sold through public tenders was 538 000 m³ or 11.7% more than in 2014.
In 2015 the most sought were technological wood and fuelwood which accounted for 76% of sales of standing timber and 64% of sales of harvested timber. The average price of harvested timber ex-warehouses of forest farms was 69 leva/m³ (U.S. $55/m³), and for standing timber 35 leva/m³ (U.S.20/m³).

The structure of harvested timber in various categories of large, medium sized, small and fuelwood vary but is on average 20:20:5:55. For coniferous timber this index is approximately 37:32:7:25, and for deciduous timber is 11:11:2:75. This illustrates the deficit of quality hardwood since 75% of produced hardwood is of quality of fuelwood. The market for softwood offers better quality product with 69% of timber in higher quality classes compared to 22% for hardwood. In 2015 out of total 4.0 million m³ produced hardwood, 79% was sold for fuelwood and only 11% for furniture making and construction purposes.

Forest Certification

Forest certification is carried out under FSC (Forest Stewardship Council). Currently, there are 109 certified forest enterprises and organizations with a total area of 810,000 HA or 19% of the total forest land. Certified state forest land is 28% of all state forests. This is a sharp increase compared to 230,000 HA certified at the end of 2012. Due to stronger export orientation of the wood processing and furniture sector, this trend will likely be preserved or accelerated.

There are 112 wood processors certified under PEFC Chain of Custody for timber traceability.

Forest Sector Organizational Structure and Administration

Organizational structure of the forest sector includes the Executive Forest Agency under the MinAg with 16 regional forest directories and a National Council of Forests. There are several specialized territorial units such as 2 seed control stations, 3 forest protection stations, 11 nature park directorates, and a poplar station.

The economic functions in the sector are performed by 137 forest enterprises (or often called forest farms) and 28 state hunting enterprises united in 6 regional state forest companies. These companies are the main harvesters of logs, either on their own or through contracting with private loggers as they also supervise private harvesting. The state forest companies organize sales of timber through public tenders. These companies sell non-timber products as well, perform hunting and fishing management duties, carry out forest protection (fires and pests), maintain roads and take care of sylviculture activities.

The Executive Forest Agency performs policy and control functions, carries out forest inventory, supports private forest owners through an extension service, coordinates erosion and forest fire management, provides nature park management and seed control.

Forest Legislation and Strategy

The major legislation is the Forest Act, in force from April 9, 2011, with more than 20 implementing regulations. Other legislation includes the Hunting and Game Management Act with one implementing regulation. There are also Regional Plans for the Development of Forest Territories.

There are several strategic national documents which outline the framework for the development of the sector, as follows:

- National Strategy for the Development of the Forest Sector 2014-2020;
- Strategic Plan for the Development of Forest Sector 2014-2023;
- National Development Program of Bulgaria 2020;
- Third National Climate Change Action Plan 2013-2020;
- National Action plan for Energy from Renewable Sources;
- National Long-Term Program for Promotion of the Utilization of Biomass for the Period 2008-2020.

The above documents establish longer term goals for the development of the forest sector such as: sustainable development through an optimal balance between the ecological functions of the forests and ability to provide long-term material benefits and services; enhancing the role of forests for an economic growth and more balanced social-economic development; and increasing the contribution of the forest sector in the green economy.

Forest Policy

Over the last two years the MinAg undertook a number of initiatives to implement long-due reforms in the forest sector. Transparency and dialogue with stakeholders, industry and non-governmental organization was improved. The revenue of forest enterprises increased substantially.

Several initiatives were introduced to address illegal logging and more efficient and transparent timber sales:

- In April 2015 the MinAg introduced electronic tickets for transportation of harvested logs which allowed for online tracking of logs. The new system was made available for the public to guarantee transparency and prevention of illegal harvesting;
- In 2015 the MinAg adopted a new regulation about timber sales. The regulation introduced electronic public tenders both for standing timber and for already harvested timber;
- In 2016 the MinAg introduced unique identification numbers for marking of timber/logs;

- The MinAg introduced an electronic recording for tracking the origin of timber. After its successful pilot project launch in 2016, new electronic records were introduced in all 4000 wood processing and furniture enterprises on January 1, 2017. This was the first step to a complete digitalization of the forestry sector. The electronic records contain detailed information about incoming and outgoing timber and wood products at each wood processing enterprise;
- Changes in timber sales regulation is planned for 2017. The intention is to introduce preferences for wood processors at timber tenders.

In 2016 the MinAg initiated purchases of private forests through tenders. Although privatization of forests years ago was successful, the resulting fragmentation and small size of private forests, lack of infrastructure, experience, knowledge and capital, as well as the fact that most owners live in urban areas, made the management of private forests challenging. In some regions private forest owners were unable to effectively implement forest management plans or could not protect their forests against illegal loggers. Often, they were unwilling to wait for longer term benefits, thus clear cutting in such regions became a norm. This caused public outrage and many private owners began to look for ways to sell their forests, including to the government. As a result, in 2016 the MinAg decided to offer purchases through public tenders.

As of December 2016, 56 purchases of private forests were finalized, 156 parcels of forests on 111 HA were sold at an average price of 5,200 leva/HA (U.S. $2,800/HA) which was 71% of the average price of agricultural land in the country. The price varied considerably depending on the region, tree species, and infrastructure. The interest of private owners was high, especially in regions where wood processing and infrastructure are less developed. The MinAg 2017 budget for purchases of private forests was doubled so that the MinAg can make forests consolidation and provide better forest management this year.

Wood Processing and Furniture Manufacturing

Roundwood Production and Wood Processing

According to the latest official data (Eurostat, 2014, see Table 2), total round wood production (under bark) from all tree species was 5.6 million m^3. This was 10% less than in the previous year. The share of fuel wood was 45% (2.53 million m^3). Since 2010, the share of fuel wood ranges from 45% to 47%. This is a much higher index compared to the EU average of 25% which creates serious competition among wood processors and furniture makers. Rural areas and small towns rely mainly on fuel wood as the major energy source in the winter season.

The highest was the share of industrial round wood, 55% (3.04 million m^3), since 2010 the share of this type of wood has been from 53% to 55%. In the structure of industrial wood, saw logs and veneer logs account for 47% (1.4 million m^3), and 51% was for pulpwood. In the last 5 years, saw logs and veneer logs share has been consistently lower than pulpwood ranging from 44% to 47% compared to 46% to 54% for pulp wood. Thus higher quality raw material softwood and hardwood, available for furniture makers in 2015, was only 26% of total wood production. This share has been stable at 23% to 26% for the last 5 years or from 1.3 to 1.6 million m^3.

Coniferous timber (mainly softwood) accounted for 44% (2.5 million m^3) of total round wood production which is the highest compared to 34%-38% for the previous 5 years. Industrial round wood was 81% (2.0 million m^3) of all softwood (77%-87% in 2010-2015), much above the share of fuelwood (19%). Within industrial round wood, saw log and veneer logs had a dominant share of 54% over pulpwood (44%) or higher quality softwood (44% of total softwood production).

Deciduous timber (mainly hardwood) accounted for 56% (3.1 million m^3) of total round wood production which is the lowest compared to the previous 5 years. This index has declined every year from 65% in 2010. In absolute volume, production decreased from 3.7 million m^3 (2010) to 3.1 million m^3 (2014), or by 26%, which has gradually **created a deficit market for hardwood in the country**. In addition, the volume of industrial round wood also declined from 1.3 million m^3 to 1.0 million m^3 in 2015 or by 23%. The share of industrial round wood dropped from 36% in 2010 to 33% in 2012-2014. Finally, the share of higher quality saw logs and veneer logs is lower than that of pulpwood at 34% in 2015 (30%-31% in 2010-2013) and production was at 357 000 m^3 compared to 397 000 m^3 in 2010, a decline of 10%. Thus the higher quality hardwood was only 11.5% of total hardwood production.

Furniture Industry

The wood processing and furniture industry consists of a large number of small and medium sized companies, about 3,600 of which about 2,100 are furniture markers. The industry is fragmented and this often makes trade challenging.

Most wood processors are small companies with up to 10 employees (78%), and among furniture makers the situation is similar where this category accounts for 70% of market players. Companies with 10-50 employees account for 19% of wood processors and 24% of furniture makers while those with more than 250 employees are 0.3% of wood processors and 0.6% of furniture makers. In recent years, the number of smallest companies has declined compared to those those with 10-50 employees.

The industry is concentrated in 10 out of 28 country regions, mainly in Southern Bulgaria close to forests and/or larger cities. Since 2007 the labor force in the sector has decreased. Furniture makers currently employ about 21,000 workers, compared to 27,000 in 2007. Today the deficit of labor is one of the biggest challenges for the industry.

The industry has attracted a number of international players. Foreign investment in the wood processing industry is higher than in the furniture sector. It is increasingly challenging for local players to compete on the basis of quality, technological innovations and pricing, as well as marketing. The number of ISO-certified companies has grown sharply as this is one of the key requirements for successful exports.
The economic crisis in 2009-2012 had a negative impact on the furniture industry. Before this period the domestic demand was focused mainly on premium furniture products. Today the industry is still struggling with economic challenges as consumer demand has slowly but steadily recovered. Production has grown steadily since 2012 and was positively affected by changing consumer preferences domestically and for exports.

Local customers have adopted a more rational and income conservative approach preferring medium-priced furniture. Manufacturers in this category of products began to enhance their production processes to increase productivity and lower costs, along with expanding their portfolios. At the same, manufacturers of prime quality furniture began to focus on export markets.

Furniture makers working in the medium-priced segment increased their demand for wood-based panels such as particle boards which are easy to assemble and lower manufacturing costs. Solid wood is sought mainly for those working for exports. Per industry experts, wood-panel based furniture is not export competitive due to the dominance of other regional players (mainly Poland).

Most industry experts believe that recent industry growth will be sustained and furniture manufacturing will grow by 5% in the next 3 years.

The types of produced furniture are very diverse and have changed over time. At present, it is estimated that 17% of total production is furniture for office and retail outlets/showrooms, 13% is kitchen furniture and 68% is other types of furniture. The most dynamic has been chair production, followed by kitchen furniture, however, the prospects for the next three years are related mainly to the production of office and retail/showroom furniture. Chair production has stagnated lately due to lack of a **competitive supply of hardwood**. In the structure of wood products, the highest is the share of production of plywood, followed by builders' carpentry and joinery, and wooden containers.

According to industry estimates, locally made furniture accounts for 25% of total furniture sales on the domestic market while imports account for 75% (compared to an average index of 47% for the EU). Imports of furniture originating from the EU account for 54% of total sales while imports from non-EU countries account for 21% of sales.

In the period 2006 - 2009 the construction industry boomed and stimulated demand for various types of lower-end wood products. During the same period, the tourist industry also skyrocketed with opening of new hotel outlets which stimulated production of hotel furniture. In 2014-2016 the construction industry began to recover after the economic crisis and renewed its demand while tourism has continued to thrive and demand higher quality furniture products.

Exports of furniture have always dominated over domestic market sales as a source of more stable revenue. After the economic crisis 2009-2012, the export orientation has strengthened to compensate for the weaker domestic demand. While in 2009 20% of furniture production was exported (per industry sources), in 2010 this index grew to 23% and to 50% in 2015.

According to the Bulgarian Timber Chamber, the main challenges facing the furniture industry today are:

- Deficit of sustainably-sourced, quality and price competitive raw materials, especially hardwood;
- Energy efficiency, energy costs account for 2.5% of final production costs compared to the EU average of 1.4%;
- Labor costs and deficit of skilled labor. Labor costs account for 11.4% of production costs compared to 18.7% average for the EU. The wages are reportedly the lowest in the EU which is a competitive advantage but also makes the industry unattractive for skilled labor.
- Production costs are 82.1% of final production value compared to 73.3% average for the EU.
- Need for technology investment, innovations, R&D etc.

Timber Chamber data shows that investment in equipment and technology in the industry is 49% of total investment compared to 71% average for the EU. Investments in design became increasingly important due to pressure coming from Asian furniture imports. Currently, local manufacturers rely mainly on design to make their products recognizable and differentiate from competition. Design is also the main tool applied in production of high-end furniture.

Trade in Wood Products and Furniture

Bulgaria has a positive trade balance in trade with forest products (excluding pulp), see Tables 5 and 6.

Imports by value peaked in 2014 to U.S. $215 million but dropped by 8% in 2015, and increased again in 2016 (September) by 7%. Major origins of imports are Romania, Germany and Italy.
Exports also peaked in 2014 reaching U.S. $430 million, however, it declined by 16% in 2015 and by another 7% in 2016 (September) thus narrowing the trade balance by 24% for 2016. This is due mainly to the decrease in exports to Turkey which is the major export market with over 30% share. Exports to Turkey dropped by 25% in 2015 and by 35% in 2016 (September). Exports to Greece, the second main export market, were stagnant. The main products exported to these two markets are logs and lumber. Italy is the third main export market which registered a growth of 8% in 2016.
Imports of hardwood lumber (Table 7) have stable and steady growth trend since 2011. In 2015 imports were at U.S. $6.2 million or 2% over 2014 and 29% more than in 2011. In 2016 (September), imports skyrocketed with 35% growth. The main source of hardwood is Ukraine, followed by Romania and Bosnia & Herzegovina. In 2016 imports from Ukraine and Romania grew sharply by 61% and 67%, respectively.

Exports of hardwood lumber (Table 8) reached U.S. $14.2 million in 2014 but have declined since then by 13% in 2015 and by 9% in 2016. Italy, Greece, Turkey and Germany are the main export destinations and all four have seen reduced exports in 2015/2016 as one of the reasons is the more favorable local demand.

Imports of softwood lumber (Table 9) peaked in 2012 at U.S. $3.6 million but declined since then to U.S. $2.9 million in 2015. In 2016 (September) imports were further 20% downward. Major origins of softwood lumber are Romania, Austria and Germany. Exports of softwood have grown and peaked in 2014 at U.S. $59 million (Table 10). Since then it declined to U.S. $51 million in 2015 and in 2016 it was 21% less vs. 2015.

Exports of furniture are under three major categories and tariff numbers HS#9401, HS#9403, and HS#9404. Between 2001 and 2011 total furniture exports grew from U.S. $87 million in 2001 to U.S. $122 million in 2011. During this period, the highest share in exports was under HS#9403 (Furniture and Furniture Parts) 47%, followed by HS#9401 (Seat Furniture) with 42% and HS#9404 (Mattresses), 11%. In 2011 exports under HS#9401 (Seat Furniture) reached U.S. $66 million or 48% of total furniture exports and it made Bulgaria to be known for its exports of wooden chairs.
In 2015 exports under the three respective categories were at U.S. $467 million – 382% more than in 2011 (U.S. $233 million, U.S. $145 million, and U.S. $89 million, respectively). Exports were lead

again by the first category (Seats Furniture) with 50% share.

Exports continued to expand in 2016 (data as of September) by 13%. Major export products in 2016 were HS#9401 chairs and seating furniture (U.S. $198 million) at 50% of total exports, followed by wooden furniture HS#9403 at 29%, and Matrasses (20%). The annual growth rates of the three categories were of 14%, 5% and 24%, respectively. The main export markets were Germany, France, The United Kingdom, Italy, Czech Republic and Denmark. The fastest growing export markets (double digit growth) in 2016 were the UK, Czech Republic, Poland, France, Italy and Sweden.

Table 2. Timber Production in Bulgaria 2010-2014

Timber Production in Bulgaria 2010-2014, thousand cubic meters					
	2010	**2011**	**2012**	**2013**	**2014**
Total, all species					
Roundwood, under bark	5,668	6,205	6,092	6,154	5,570
Roundwood, over bark	6,605	7,215	7,076	7,058	NA
Fuelwood, under bark	2,657	2,841	2,836	2,778	2,534
Fuelwood, over bark	3,160	3,378	3,369	3,264	NA
Industrial roundwood, under bark	3,011	3,364	3,256	3,396	3,036
Industrial roundwood, over bark	3,445	3,836	3,707	3,793	NA
Sawlogs and veneer logs, under bark	1,320	1,520	1,488	1,563	1,432
Sawlogs and veneer logs, over bark	1,491	1,713	1,676	1,759	NA
Sanwood	554	728	698	801	NA
Pulpwood, round and split, under bark	1,613	1,754	1,593	1,573	1,544
Pulpwood, round and split, over bark	1,865	2,021	1,947	1,953	NA
Other industrial round wood, under bark	78	90	82	70	60
Other industrial roundwood, over bark	88	101	84	81	NA
Coniferous Timber					
Roundwood, under bark	1,960	2,310	2,348	NA	2,465
Roundwood, over bark	2,156	2,541	2,583	2,883	NA
Fuelwood, under bark	278	305	313	349	465
Fuelwood, over bark	306	335	392	505	NA
Industrial roundwood, under bark	1,682	2,005	1,821	1,851	2,000
Industrial roundwood, over bark	1,850	2,205	2,191	2,379	NA
Sawlogs and venner logs, under bark	923	1,101	1,000	1,014	1,075
Sawlogs and venner logs, over bark	1,015	1,211	1,200	1,281	NA
Pulpwood, round and split, under bark	701	834	758	783	876
Pulpwood, round and split, over bark	771	917	927	1,035	NA
Other industrial roundwood, under bark	58	70	64	54	50
Other industrial roundwood, over bark	64	77	64	63	NA
Deciduous (Non-Coniferous) Timber					
Roundwood, under bark	3,708	3,895	3,744	3,532	3,104
Roundwood, over bark	4,449	4,674	4,493	4,174	NA
Fuelwood, under bark	2,379	2,536	2,602	2,429	2,068

Fuelwood, over bark	2,854	3,043	2,977	2,758	NA
Industrial roundwood, under bark	1,329	1,359	1,234	1,174	1,035
Industrial roundwood, over bark	1,594	1,630	1,516	1,414	NA
Sawlogs and venner logs, under bark	397	419	381	368	357
Sawlogs and venner logs, over bark	476	502	476	479	NA
Pulpwood, round and split, under bark	912	920	835	789	668
Pulpwood, round and split, over bark	1,094	1,104	1,020	917	NA
Other industrial roundwood, under bark	20	20	18	16	11
Other industrial roundwood, over bark	24	24	20	17	NA
Source: Eurostat					

Table 3. Production of Wood Products 2010-2014

Production of Wood Products, thousand cubic meters					
	2010	**2011**	**2012**	**2013**	**2014**
Sawn wood	554	728	697	803	NA
Wood based panels	876	953	986	951	961
Particle boards, OSB, MDF etc)	772	831	863	828	NA
Veneer sheets	22	23	20	20	22
Plywood	29	NA	39	39	64
Source: Eurostat					

Table 4. Trade in Wood Products 2010-2014

Trade in Wood Products (thousand euro)					
	2010	**2011**	**2012**	**2013**	**2014**
Imports					
Industrial round wood	2,279	2,281	2,084	1,632	2,004
- Coniferous	445	485	574	402	1,298
- Non- coniferous	1,834	1,795	1,510	1,230	707
Exports					
Industrial round wood	21,972	22,553	25,023	16,646	31,464
- Coniferous	8,554	9,035	7,528	7,687	8,709
- Non- coniferous	13,417	13,518	17,494	8,959	22,755
Imports Sawnwood	4,882	4,888	7,675	6,550	6,330
Exports sawnwood	27,460	44,297	41,561	51,325	55,057
Imports veneer sheets	5,232	7,489	8,045	8,462	8,968
Exports veneer sheets	4,031	3,726	3,541	3,525	3,267
Source: Eurostat					

Table 5. Imports of Forest Products 2011-2016 (September)

Bulgaria Import Statistics

Commodity: Forest Products exc Pulp/Paper, Group 15 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	181,345	194,767	198,999	214,677	197,673	145,292	156,163	7.48
Romania	25,105	29,933	36,569	41,980	39,236	29,463	32,183	9.23
Germany	28,262	29,365	27,468	26,932	25,118	18,847	20,832	10.54
Italy	8,538	22,124	24,729	24,745	22,516	14,401	16,440	14.16
China	17,384	17,515	15,252	20,772	18,152	13,723	12,700	-7.45
Poland	12,124	8,902	11,286	14,502	14,048	10,991	11,283	2.65
Turkey	11,195	9,837	10,924	14,200	13,391	9,606	11,593	20.68
Austria	15,123	12,381	14858	11,937	9,211	6,755	7,050	4.36
Greece	17,905	16,645	11910	8,290	8,011	5,690	5,133	-9.8
Serbia	5,435	7,857	6,442	6,498	6,243	4,531	4,190	-7.52
Hungary	2911	4,378	5,965	5,052	5,206	3,735	3,495	-6.42
Ukraine	2,413	3,657	2,808	4,520	4,895	3,421	7,073	106.73
Czech Republic	5,622	5,612	5,166	5,711	4,735	3,622	3,718	2.65
United States	4,540	3,824	4,872	8,686	4,426	3,486	2,580	-25.97
Russia	3,059	4,069	3,481	3,876	4,149	2,986	4,972	66.49
Spain	2,915	1,575	1,558	1,714	2,451	2,142	720	-66.36
France	2,852	2,792	2,658	1,458	2,307	1,653	1,809	9.44
Switzerland	1,872	1,639	2,001	1,855	1,794	1,469	1,407	-4.23

Source: WTA

Table 6. Exports of Forest Products 2011-2016 (September)

Bulgaria Export Statistics								
Commodity: Forest Products exc Pulp/Paper, Group 15 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	344,910	360,381	370,240	430,255	365,655	269,574	250,537	-7.06
Turkey	116,178	125,927	121,543	146,516	110,714	84,766	55,272	-34.79
Greece	71,630	85,206	93,054	106,09	98,487	70,983	71,361	0.53

				5				
Italy	32,265	37,836	47,204	63,248	59,176	42,748	46,314	8.34
Germany	8,128	9,384	10,375	13,267	18,572	11,730	15,673	33.61
Macedonia	18,665	12,990	12,206	12,249	11,006	7,941	8,827	11.15
Romania	14,698	14,252	8,017	13,811	10,936	8,274	8,224	-0.61
France	8,623	9,204	10,557	10,807	10,285	7,607	7,734	1.67
Serbia	9,743	9,680	8,044	7,329	6,333	4,870	6,070	24.63
Algeria	7,798	5,224	5,737	11,684	5,760	4,200	4,903	16.72
United Kingdom	4,847	5,439	4,987	5,106	4,383	3,232	3,311	2.43
Cyprus	1,433	967	1,202	2,961	1,990	1,665	1,044	-37.31
Israel	1,054	1,422	2,005	1,886	1,915	1,495	2,131	42.57
Netherlands	1,360	1,598	1,776	1,884	1,915	1,389	1,004	-27.67
Czech Republic	1,600	1,720	2,188	1,973	1,825	1,510	1,335	-11.59
Austria	8,023	4,722	7,030	5,486	1,706	1,334	1,110	-16.79
China	1,736	1,074	1,028	1,498	1,456	904	2,282	152.31
Morocco	1,230	1213	1,164	1,322	1,375	947	1,087	14.78
Hungary	1,239	1,741	806	474	1,208	983	579	-41.03

Source: WTA

Table 7. Imports of Hardwood, 2011-2016 (September)

Bulgaria Import Statistics								
Commodity: Hardwood Lumber, Group 13 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	4,860	6,275	5,413	6,151	6,282	4,460	6,045	35.53
Ukraine	1,400	1,465	1,223	2,074	1,666	1,248	2,010	61.04
Romania	1,199	1,830	1,207	1,157	1,303	947	1,584	67.27
Bosnia & Herzegovina	332	510	590	650	627	437	418	-4.28
Austria	206	352	481	522	579	401	427	6.43
Greece	258	306	608	363	502	322	231	-28.41
United States	224	126	395	476	344	234	201	-13.99
Italy	219	387	206	87	315	183	110	-39.76
Serbia	11	27	7	17	199	147	89	-38.85
Germany	143	180	107	50	152	75	310	309.77
France	95	169	65	39	130	130	85	-34.15
Congo	0	13	0	21	87	67	60	-9.58

Croatia	235	188	104	1	75	52	82	56.91

Source: WTA

Table 8. Exports of Hardwood 2011-2016 (September)

Bulgaria Export Statistics								
Commodity: Hardwood Lumber, Group 13 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	12,736	11,023	12,554	14,176	12,357	9,396	8,567	-8.82
Italy	3,122	2,796	2,714	3,925	3,743	2,675	2,609	-2.46
Greece	3,433	2,717	3,268	3,782	3,141	2,474	2,095	-15.29
Turkey	803	986	1,642	1,700	1,856	1,446	1,364	-5.67
Germany	778	1,114	1,415	1,231	808	626	493	-21.17
Jordan	449	163	409	282	760	648	294	-54.65
China	740	927	916	720	500	410	289	-29.41
Japan	215	230	229	260	381	277	143	-48.45
Tunisia	764	583	749	598	284	192	57	-70.06
Israel	79	53	123	312	200	134	201	50.6
Spain	53	139	136	203	166	120	101	-15.73
Vietnam	217	65	107	46	77	55	11	-79
United Kingdom	59	286	2	56	73	28	116	305.3
Hungary	0	0	0	0	43	43	36	-15.23
Switzerland	3	7	1	0	38	38	14	-63.26
United States	17	28	5	21	30	30	0	-100

Source: WTA

Table 9. Imports of Softwood, 0211-2016 (September)

Bulgaria Import Statistics								
Commodity: Softwood and Treated Lumber, Group 12 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	1,997	3,606	3,304	2,236	2,877	2,341	1,876	-19.85
Romania	587	1,732	1,126	1,056	918	674	638	-5.41
Austria	220	182	254	331	485	417	318	-23.65
Netherlands	101	289	114	39	369	369	0	-100

Germany	456	457	37	283	293	240	271	13.09
Ukraine	57	79	28	75	188	139	280	101.39
Montenegro	0	0	0	0	155	155	0	-100
Russia	105	117	77	14	115	98	159	61.64
Czech Republic	112	221	108	20	92	81	12	-84.03
Finland	56	162	137	85	78	71	117	65.43
Spain	0	0	15	39	43	19	0	-100
United States	38	32	7	70	43	9	17	84.28
Turkey	106	110	83	106	38	29	37	26.02
Denmark	0	0	0	0	19	4	0	-100
France	47	42	45	42	17	17	18	5.27
Italy	10	4	79	25	16	12	0	-100

Source: WTA

Table 10. Exports of Softwood, 2011-2016 (September)

Bulgaria Export Statistics								
Commodity: Softwood and Treated Lumber, Group 12 (2012)								
Annual Series: 2011 - 2015, Year To Date: 09/2015 & 09/2016								
Thousand United States Dollars								
Partner Country	**Calendar Year**					**Year To Date**		
	2011	**2012**	**2013**	**2014**	**2015**	**09/2015**	**09/2016**	**%Change**
World	49,102	42,176	55,573	59,018	50,581	37,951	30,151	-20.55
Turkey	27,994	29,075	39,361	41,163	31,749	24,985	17,108	-31.53
Greece	12,535	8,871	11,858	13,171	15,594	10,556	10,287	-2.55
Macedonia	6,094	3,448	2,930	2,300	1,689	1,244	1,297	4.28
Italy	633	282	272	919	642	541	927	71.13
Tunisia	12	0	39	65	402	299	132	-55.96
Romania	19	18	1	59	156	116	98	-15.35
Germany	26	0	2	1	86	0	0	-100
Albania	7	0	14	20	78	51	198	285.44
Vietnam	0	0	9	12	54	54	0	-100
Sudan	0	0	11	127	25	25	11	-56.64
Iraq	0	32	6	29	17	17	0	-100
United Kingdom	122	0	0	13	16	0	0	-100
France	0	0	0	6	16	5	50	840.56
Qatar	0	0	29	20	9	9	0	-100

Source: WTA

End of Report