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# France

# Solid Wood Products

# Annual

# 2002

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**Report Highlights:**
**The United States takes the lion's share of France's imports of temperate hardwood logs and lumber. Due to a strong dollar and competition from domestic and European suppliers, exports of U.S. wood products, especially hardwod lumber, decreased in 2001. In CY 2002, wood consumption remained stagnant as the economy slowed down, Moreover, French forecasts are even gloomier for CY 2003 as the economy growth is forecast to be less than one percent. Nevertheless, market opportunities will still exist, especially for U.S. cherry and maple exports for the furniture industry, for oak for barrel production, and because of their experience and expertise, for U.S. wooden home manufacturers in the growing French wooden housing sector.**

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Includes PSD changes: Yes
Includes Trade Matrix: Yes
Annual Report
Paris [FR1], FR

## Executive Summary

France’s forests cover more than 29 percent of the country. After centuries of loss to agriculture and urbanization, the French forest area has been steadily growing since the mid 20th century to 16 million hectares. In CY 2001, hardwood represented 63 percent of the French forest, while softwood represented 27 percent and mixed forest the remaining part.

The short-term impact of the 1999 hurricanes Lothar and Martin which destroyed about 148 million cubic meters of wood have worked its way through the system according to the French wood industry. After prices decreased in 2000, wood prices, especially for superior quality oak, have regained most of the lost ground since. However, availability of some quality French wood may be down for several years until new trees become usable for timber, thus opening opportunities for U.S. hardwood exporters.

The wood sector in France employed in 2000 (no CY 2002 data available) about 257,000 workers in 35,000 companies with a total revenue of about USD 37 billion (including USD 8 billion for the paper and cardboard industry). This sector is supported by the State through the Ministry of Agriculture and the Ministry of Industry, and by regions, counties and by the European Union. The wood industry came out in CY 1999 from the deep recession and had shown since a robust growth. After almost a decade of decline, employment increased. However, 2002 turned out to be gloomier. The French economy growth is expected to be less than 1.4 percent annually. Preliminary estimates for 2003 do not show a sharp recovery with economy growth forecasted around 1 percent. Uncertainty in the overall world situation, weak demand both domestically and abroad will likewise impact negatively on France’s wood industry sales and growth in 2003.

In CY 2001, total French wood and wood products exported amounted to USD 1.9 billion while imports reached 2.4 billion. Apart from some lumber and plywood trade (mostly with tropical hardwood), most French exports and imports are within the European Union. The United States provided about 5 percent of France’s total wood product imports (in value), but is the largest supplier to France of temperate hardwood lumber and a major supplier of hardwood logs for lumbering (Note that trade matrices include hardwood logs for pulpwood). The United States also supplied 3 percent of imported plywood (mostly softwood plywood) and a residual amount of imported softwood lumber. In the future, U.S. wood exporters will have to compete with either domestic wood producers, as domestic production of precious temperate hardwood increases (once the temporary shortage generated after the 1999 hurricanes ends), and with increasingly competitive EU and Eastern European countries. Imports of hardwood lumber and even finished products from Slovakia, Romania and Poland, especially when those countries join the European Union in May 2004, may impact negatively U.S. hardwood exports to France. On the other hand, most French importers say it is the strength of the dollar against the Euro that is the most dangerous threat to U.S. wood exports to France, However, the recent decline in the value of the U.S. dollar versus the Euro will certainly support U.S. wood exports in 2003.

While nearly 80 percent of U.S. hardwood exports to France are used in the furniture industry, U.S. hardwoods are also used for flooring, moldings and paneling. U.S. exporters are able to more consistently provide large volumes of logs and lumber, compared to the smaller domestic suppliers. Users also praise the quality of the U.S. wood, especially in the furniture industry. In France, U.S. wood products are imported either through agents or importers, who sell them to small and medium sized users, or directly from the United States by the largest users. Preliminary data for CY 2002 show that U.S. softwood lumber exports to France have continued to plummet, mainly because of strong competition from Northern Europe, while exports of hardwood logs and lumber have remained stable, despite strong domestic and foreign competition and the high value of the U.S.

dollar.

IMPORTANT NOTE: Data in this report are gathered from different sources. Production data come mainly from the French Ministry of Agriculture, the French Ministry of Industry and the Technical Center for Wood and Furniture. Trade data come mainly from Customs, French Ministry of Agriculture and French Wood Trade Associations. These data often present significant discrepancies, especially between PS&D and Trade Matrices. Post has chosen to use the most accurate and reliable data for the PS&Ds, while trade matrices, due to problems with the customs classifications and the conversion from metric tons to cubic meters, may not accurately gauge the volume of trade but instead should be used to reflect the relative shares of the different suppliers and customers of wood and wood products.

Average Exchange Rate used in this report for:
CY 1999: USD 1.00 = FF 6.15
CY 2000: USD 1.00 = FF 7.13 = Euro 0.924
CY 2001: USD 1.00 = Euro 0.896

## STRATEGIC INDICATOR TABLE

| | | | |
|---|---|---|---|
| FOREST PRODUCT | | | |
| STRATEGIC INDICATOR TABLES FOR (COUNTRY) | | | |
| (Please do not add/delete rows or columns -- note and other info must be added below row 110 -- thank you!) | | | |
| | | | |
| CONSTRUCTION MARKET | | | |
| Country: France | Previous | Current | Following |
| Report Year: 2002 | Calendar Year | Calendar Year | Caler |
| Total Housing Starts (thousand units) | N/A | N/A | N/A |
| --of which, wood frame (thousand units) | 7 | 7 | |
| --of which, steel, masonry, other materials (thousand units) | | | |
| --of total starts, residential (thousand units) | 292 | 285 | |
| ----of residential, single family (thousand units) | 191 | 184 | |
| ----of residential, multi-family (thousand units) | 101 | 101 | |
| --of total starts, commercial (thousand units) | N/A | N/A | N/A |
| Total Value of Commercial Construction Market ($US mil) | 41,000 | 40,000 | 39, |
| Total Value of Repair and Remodeling Market ($US million) | 46,000 | 45,000 | 40, |
| | | | |
| | | | |
| FURNITURE & INTERIORS MARKET | | | |
| Country: | Previous | Current | Following |
| Report Year: | Calendar Year | Calendar Year | Caler |
| Total Housing Starts (number of units) | N/A | N/A | N/A |
| Total Number of Households) | 23,500 | 23,500 | 23, |
| Furniture Production ($US million) | 9,000 | 9,050 | 8, |
| Total Furniture Imports ($US million) | 3,000 | 3,020 | 2, |
| Total Furniture Exports ($US million) | 2,200 | 2,220 | 2, |
| Interiors Market Size ($US million) | | | |
| | | | |
| | | | |
| MATERIAL HANDLING MARKET | | | |
| Country: | Previous | Current | Following |
| Report Year: | Calendar Year | Calendar Year | Caler |
| Total Value of Industrial Output ($US million) | 1,450 | 1,500 | 1, |
| New Pallet Production (million units) | 44,000 | 45,000 | 42, |
| | | | |
| | | | |

| | | | |
|---|---|---|---|
| FOREST AREA | | | |
| Country: | Previous | Current | Following |
| Report Year: | Calendar Year | Calendar Year | Caler |
| Total Land Area (million hectares) | 55 | 55 | |
| Total Forest Area (million hectares) | 16 | 16 | |
| --of which, Commercial ('000 hectares) | 15 | 15 | |
| ----of commercial, tropical hardwood ('000 hectares) | 0 | 0 | |
| ----of commercial, temperate hardwood ('000 hectares) | 9 | 6 | |
| ----of commercial, softwood ('000 hectares) | 6 | 6 | |
| Forest Type | | | |
| --of which, virgin ('000 hectares) | N/A | N/A | N/A |
| --of which, plantation ('000 hectares) | N/A | N/A | N/A |
| --of which, other commercial (regrowth) ('000 hectares) | N/A | N/A | N/A |
| Total Volume of Standing Timber (thousand cubic meters) | | | |
| --of which, Commercial Timber ('000 cum) | 1,900,000 | 1,900,000 | 1,900, |
| Annual Timber Removal ('000 cum) 1/ | 25,000 | 30,000 | 30, |
| Annual Timber Growth Rate ('000 cum) | 80,000 | 80,000 | 80, |
| Annual Allowable Cut ('000 cum) | | | |
| | | | |
| 1/ If Removals exceeds growth rate, analyze impact in text. | | | |
| | | | |
| | | | |
| WOOD PRODUCTS SUBSIDIES | | | |
| Country: | Previous | Current | Following |
| Year of Report | Calendar Year | Calendar Year | Caler |
| Total Solid Wood Export Subsidy Outlay ($US million) | 0 | 0 | |
| Is there a ban on the export of logs, lumber, or veneer? 1/ | No | No | No |
| Are there export taxes (yes/no)? 2/ | No | No | No |
| Total Wood Production Subsidy ($US million) | 450 | 450 | |
| Scope (thousands of hectares) | N/A | N/A | N/A |
| Are there other wood products export expansion activities? 1/ | N/A | N/A | N/A |
| | | | |
| 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 |
| Country: | Product | Current | Following |
| Report Year: | Description 1/ | Year | Year |

| | | | |
|---|---|---|---|
| 4401 | | Same as | |
| 4403 | | European | |
| 4404 | | Union | |
| 4405 | | Tariff | |
| 4406 | | Rates | |
| 4407 | | | |
| 4408 | | | |
| 4409 | | | |
| 4410 | | | |
| 4411 | | | |
| 4412 | | | |
| 4413 | | | |
| 4414 | | | |
| 4415 | | | |
| 4416 | | | |
| 4417 | | | |
| 4418 | | | |
| 4419 | | | |
| 4420 | | | |
| 4421 | | | |
| 4422 | | | |
| 4423 | | | |
| 4424 | | | |
| 4425 | | | |
| Pre-fabricated Houses, a subsection under chapter 96 | | | |
| | | | |
| 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. | | | |

# FRANCE FOREST OUTLOOK,

**General**

France's forests cover more than 29 percent of the country. After centuries of loss to agriculture and urbanization, the French forest area has been steadily growing since the mid 20th century to 16 million hectares. In CY 2001, hardwood represented 63 percent of the French forest, while softwood represented 27 percent and mixed forest the remaining part. Hardwood timber is grown as high forest and coppices while softwood timber is almost exclusively grown as high forest.

Eleven species of pine cover 63 percent of all the softwood area. The maritime pine tops the list (1.4 million hectares) followed by the Scots pine (1.1 million hectares) and the Aleppo pine. Spruce and firs are equally

widespread.
Fourteen hardwood species occupy a minimum area of 50,000 hectares, which is a good indicator of the biological diversity of France's forests. Oak timber, mainly from the sessile and common oak species (4.2 million hectares for the two), covers half of the hardwood area. Beech timber covers 1.3 million hectares. Chestnut timber ranks third. The other hardwood species are much more scattered in forests.

## WOOD SECTOR

### General outlook

The wood sector in general includes companies involved in activities from tree cultivation and harvesting, wood lumbering and trade, to the production of wood products such as furniture, wood frames, and joinery. It employed in 2000 (no CY 2001 data available) about 257,000 workers in 35,000 companies and had about USD 37 billion in revenues (including USD 8 billion for the paper and cardboard industry). Most of the companies are small: fewer than 1,900 of them employ more than 20 workers. This characteristic weakens the French wood sector, since many companies are too small and have little investment capacity. It also limits their ablility to reduce production costs that could occur from economy of scale: structurally, most French wood processing companies are not competitive, and will face growing problems when EU norms are applied: for instance, too few French wood mills have up-to-date dryers for lumber, thus preventing their production to bear the CE mark in the future.

The wood industry came out in CY 1999 from the recession that hit the French economy since 1992. . After almost a decade of decline, employment increased and fewer companies disapeared. Since CY 1999, investment has jumped sharply. Innovation, research and development has also remained strong with more than 45 percent of the companies investing in new products and process. However, 2002 turned out to be gloomier. The French economy growth is expected to be less than 1.4 percent annually. Preliminary estimates for 2003 do not show a sharp recovery with economy growth forecasted around 1 percent. Uncertainty in the overall world situation, weak demand both domestically and abroad will likewise impact negatively on France's wood industry sales and growth in 2003.

For more information about the French wood industry:
**UIB** (Union des Industries du Bois)
33, rue de Naples, 75008 PARIS
Tel. : +33(0)1 53 42 15 50 Fax : +33(0)1 53 42 15 51
Internet: http://www.industriesdubois.com

### Public support of the wood industry

Forest management in France has been encouraged by the government since the XVIth century when wood was a strategic material used to build warships. Today's French Republic continues to support wood planting. The Ministry of Agriculture itself manages more than 3.4 million hectares of state or city owned forest through a governmental organization, the "Office National des Forêts" (National Forest Office) . The Ministry of Agriculture used to manage the National Forestry Fund (FFN), a special treasury account with revenue coming from a tax on wood-based products and the land clearance tax. Since 1947, with the financial help of the FFN, private owners and cities have planted or replanted 2.2 million hectares of forest. These plantings have been carried out on farmland, meadows, fallow and heath. In the early years of the FFN, most of the trees planted were coniferous, which will lead to a rise in softwood production of about 10 million CUM by 2010. However, since the early 1980's, temperate hardwood species have been more favored, including precious hardwoods such as red oak, cherry, ash, sycamore and timber walnut. The FFN also subsidized building and improvement of forest tracks and roads. In 2000, the FFN was abolished and replaced by direct funding from the State's budget.

The Ministry of Agriculture also uses European Union (EU) rural development funds to improve forest management in rural areas. The French National Statistical Institute (INSEE) estimated in CY 2000 (last data available) public support to productive forestry at USD 366 million.

The wood industry also benefits from supports from the State through the Ministry of Industry and Trade as well as from the regions and counties, to modernize its equipment. Details of such support are not available.

For more information about French public policy on the wood sector:

Ministry of Agriculture and Fisheries,
Direction de l'Espace Rural et de la Forêt
Sous-Direction de la Forêt *(Directorate for Forest)*
19, avenue du Maine, 75732 Paris cedex 15
Tel: 33.(0)1.49.55.51.19 Fax: 33.(0)1.49.55.41.97

Sous-Direction des Industries du Bois *(Directorate for wood industry)*
19, avenue du Maine, 75732 Paris cedex 15
Tel: 33.(0)1.49.55.51.88 Fax: 33.(0)1.49.55.40.76

Internet: http://www.agriculture.gouv.fr

**Promotion of French wood products**
In November 2001, various French wood organizations, under the umbrella of the French Wood Federation (Fédération Nationale du Bois) launched a promotion agency, called "French Timber". Similar to foreign structures such as AHEC or the Nordic Timber council, this agency will aim at promoting French wood and wood products worldwide, but will first target North African markets. By the end of 2001, no further details were available on its budget and structure.

**Wood Products Certification (PEFC and FSC schemes)**
In July 2001, France joined the PEFC scheme. As of August 2002, almost all regions have been certified in France under PEFC, for a total of 401,000 hectares both in private and public forests. The FSC scheme has been found unsuitable for French forest, because French forests are often too small and too divided between private owners. However, about 15,000 hectares of French forest have been certified under FSC scheme.

Under the pressure of NGOs, there is growing demand, especially from large Do It Yourself (DIY) superstores retailers, for certified wood products. As of December 2002, 46 French wood companies had certified their entire chain of supply.

To contact the French PEFC coordinator, Stéphane Marchesi:
PEFC France
6, avenue de St Mandé, 75012 Paris, France
Tel: 33.(0)1 43 46 57 15 Fax: 33.(0)1 43 46 39 72
pefc-france@wanadoo.fr

www.pefc.org

## CONSTRUCTION SECTOR

**General**

In 2001, residential housing starts totaled 303,000 units, down 2 percent from CY 2000. Commercial building starts totaled 40,000 sq. meters (unit figure is not available), stable from CY 2000. The house renovation industry continued to grow significantly in CY 2001, fueled by the decrease in the VAT (Value Added Tax) on building and renovation related works initiated by the GOF in September 1999. Estimates for 2002 are somehow mixed, with a slowdown in new construction starts, but strong growth in the renovation sector. The French building federation even forecast a 1 percent decrease in their activity in 2003, due to a sharp drop in the non-housing sector (offices, storagehouses, factories)

Wood demand in France for home construction, while growing, has been mainly for decorative purposes. French builders of wood homes are now trying to emphasize the other aspects of wood such as positive thermal, acoustic, and ecological qualities, cleaner work-sites and less construction delays.

In March 2001, the French Ministries for Agriculture, Environment, Housing, together with other public organizations, signed a charter to promote the use of wood in the construction sector. This charter aims at increasing the use of wood by 25 percent by 2010 (currently, wood represents about 10 percent of all material used for the construction sector). Such increase would mean the use of 4 million cubic meters more by 2010. Use of wood in the construction of public buildings, road works and social housing is especially targeted by this charter. The ultimate goal of this charter is to lower France's emission of green house gas by trapping it as wood in constructions. If achieved, this program would contribute to lower France's emission by 7 million MT of carbon dioxyd and account for 14 percent of France's emission reduction as agreed in the Kyoto agreement.

For more information about the promotion of wood in the construction sector:

**CNDB** Comité National pour le Développement du Bois
6, rue St Mandé, 75012 PARIS
Tel. : +33(0)1 53 17 19 60 Fax : +33(0)1 43 41 11 88
Internet: http://www.boisconstruction.org

**Wood Panel Sector**
**General**

Wood panels in France are produced by about 75 companies. Total sales amounted in CY 2001 to XXX million euros (USD1.5 billion). Plywood production uses mostly tropical logs (68 percent) and softwood logs (26 percent). More than half of French panel production is used in the building sector, 40 percent in the furniture industry and 10 percent for packaging and other uses. Preliminary data for CY 2002 show a decrease in sales, due to the downturn in the construction sector.

**Trade**

In CY 2001, French exports of wood panels decreased by 7 percent to Euros 550 million (USD 492 million). Imports amounted to Euros 533 million (USD 477 million). Belgium, Germany, Indonesia and increasingly Brazil are the largest suppliers of wood panels to France while Germany, Netherlands and the United Kingdom are the largest customers for French wood panels.

U.S. plywood exports to France decreased in CY 2001. This decrease is mainly attributed to strength of the U.S. dollar and an increased competition from both domestic and EU suppliers. However, French plywood importers appreciate the ability of U.S. exporters to reliably provide large volumes of high quality softwood plywood.

**Wood Frame Housing**

About 6,000 wood housing units are constructed annually, of which 4000 are wood frame units. It is estimated that this figure may double by 2010, as shown by the growing audience for the Wooden House Show held in Angers, in western France, every year (2003 edition will take place on October 3-6). The growing demand for wood frame houses is mainly linked to growing environmental awareness. Several Canadian and Scandinavian companies have recently started to develop their wood frame activities in France.

The CNDB has also launched several programs to boost the construction of wooden houses in France. It plans to teach architects, craftsmen and construction companies about the assets of wood houses, especially of wooden frame houses. Development of easy-to-use building kits by wood frame manufacturers will be encouraged to reduce construction costs. Recently, The French federation for construction, timber and flooring (FFBCMP) and the French association for wood builders (AFCOBOIS, which gathers 74 wood house builders) have decided a joined strategy in promoting wooden houses in France. While the current wood house offer is more targeted at the upper part of the market (houses over USD 100,000), they want to expand the market for more inexpensive houses (below USD 80,000)

Woods used in wood frame residential housing are generally of French origin, usually fir or spruce. If imported, the wood may come from Germany, Austria or Scandinavia, and the solid wood for housing construction usually is French, Scandinavian or Canadian. Logs and lumber of U.S. origin are usually too expensive compared to the price of domestic or northern European log and lumber.

*For more information about the Wooden House Show in Angers*: http://www.salon-maison-bois.com/

There is also a French publication (http://www.maisons-et-bois.com) which presents various examples of French wood frame houses.

**Opportunities for U.S. Business**

U.S. home manufacturers, with their experience and expertise in the wooden home construction industry, now have opportunities in France. American expertise in the field of wood frame construction, starting at the sawmill and continuing all the way to the finished house, has greatly interested French industry experts. Moreover, French homebuilders are interested in using U.S. standards and specifications for their industry.
U.S. manufacturers and exporters interested in more information should contact

*Association des Enterprises Françaises de Construction en Bois, (AFCOBOIS),*
*10, rue du Débarcadère, 75017 Paris, Tel: (33) 1 40 55 14 98 Fax: (33) 1 40 55 14 97*
*Internet: http://www.maisons-bois.org*

**Joinery**

Beginning in the 1980's, French consumers have moved from wooden and metal frames to plastic polyvinyl chloride (PVC). PVC window frames were used primarily in the renovation market, with aluminum in multi-family housing and wood in individual homes. While PVC has been the fastest growing material used for windows, individual home owners still prefer wood. However, it appears now that durability of PVC window frames is shorter than previously expected. Morever, some French insurance companies may follow their German counterparts by providing fire insurance discounts for houses using wood frame windows instead of PVC frames (which emit toxic fumes when burning).

Contacts for Interested U.S. Exporters
*Syndicat National de la Fabrication des Menuiseries Industrielles (SNFMI)*
*30, avenue Marceau, 75008 Paris, Tel: (33-1) 47 20 17 32 Fax: (33-1) 47 20 76 31*
*Internet:* http://www.snfmi-menuiserie.fr/

**Wood Floor Industry**
The upturn in the construction industry benefitted the wood floor industry in CY 2000 and to a lesser extent in CY 2001. However, due to the competition from Asian and Eastern European suppliers, domestic production only increased by 0.7 percent and prices remained sluggish, especially in the lower and middle-price part of the market. Nevertheless, according to consumer surveys, the high price of wood flooring is still a major drag on demand, despite a very good image of quality and durability.

In France, there is a demand for "ecological" and "natural" products, which helps sell wood, especially wood flooring. Most (50-70 percent) French wood floors are oak, but light wood species (such as maple and beech but not ash) are becoming more popular with the French public. Wood flooring used in renovations represents 50 percent of total French wood floor consumption.

U.S. temperate hardwood is a good alternative for French flooring producers, who, above all, appreciate the ability of U.S. suppliers to provide large volumes of lumber of homogenous quality and precise thickness size (although some shipments reportedly have had inadequate sawn width sizes). However, The growing demand for tropical hardwood flooring may in the future impact production of temperate hardwood flooring and ultimately reduce demand for U.S. hardwood for flooring.

## FURNITURE INDUSTRY

**General**
The growth in the furniture industry is closely linked with the growth of the construction industry. Furniture is often purchased during a first moving-in or, during a removal, to complete or replace existing furniture. As the construction sector is now rising from the deep recession of the past years, French furniture industry sales grew by an estimated 0.5 percent in CY 2001 to USD 4.9 billion. Estimates for CY 2002 show a decrease in furniture production, both for the office furniture and for the household furniture. No rebound is foreseen for 2003.

**Furniture Distribution System in France**
The four largest furniture distribution channels in France are large furniture outlets (45 percent of sales), smaller traditional furniture stores (20 percent), department stores (10 percent), and stores specializing in sales by mail (25 percent).

**Consumer Preferences**
The type of wood species used in France for furniture changes with the fashion. Wild U.S. cherry used to be popular in France but now is more used in Denmark, Italy and Germany.

The main species used in France are listed below:

| USE | TYPE OF WOOD |
|---|---|
| Children's and low budget furniture | Pine, fir, spruce |
| Chairs, seats and institutional furniture | Beech, ash |
| Bedsprings and frame/supports furniture | Poplar |
| Traditional furniture (antique & country) | Oak, wild cherry |
| High quality antique furniture | Walnut |
| Indoor furniture | Chestnut and maple |
| Modern furniture | Elm (more and more scarce) |

According to the American Hardwood Association (AHEC), some leading manufacturers of French furniture have shifted from buying mainly FAS grade (firsts and seconds), to more No 1 common and even No 2. Sap is always disliked, but some other characteristics like knots have become acceptable and even fashionable. The current cherry specifications are similar to white oak specifications. Maple is mainly specified F1. white and limited quantities of red oak are required in FAS for molding or when long lengths are required. More red alder is being used, possibly because of high cherry prices. Interest is increasing in tulipwood (known locally as tulipifera), and there is currently more experimenting with new hardwood species (including Chilean lenga) than ever before. Some have expressed concerns over the number of furniture companies that recently invested in plants to use fiberboard/MDF instead of solid wood.

Both furniture and non-furniture sectors need logs and lumber, which are resawn to the lumber specifications of grade, thickness and width demanded by French manufacturers. Logs are often further dried to 10-12 percent moisture content (preferred in European countries) rather than the US standard of 6-8 percent.

**Trade**
France has a net trade deficit in furniture, with imports about one-third greater than exports. France is the third largest EU exporter of furniture (after Italy and Germany). EU countries buy 62 percent of France's exports. EU countries, Brazil and Romania are the major suppliers of furniture to France.

**Market Development Programs in France for Wood Products**
The Fédération Nationale du Bois (FNB), a private organization of about 2,000 members (composed mainly of wood traders and sawmill operations) has export promotion activities in foreign countries such as trade missions and seminars. FNB's budget is not available.

**FNB**: Fédération Nationale du Bois
6, rue François 1er, 75008 PARIS
Téél. : +33(0)1 56 69 52 00 Fax : +33(0)1 56 69 52 09
Internet: http://www.fnbois.com

## FRANCE: MARKET OPPORTUNITIES FOR U.S. EXPORTERS

Many feel that there is great potential for U.S. wood products in France. France is the 7th largest customer for

U.S. temperate hardwood in Europe. While French imports of US hardwood declined sharply (by 33 percent) in 2001 due to the oversupply from domestic wood, preliminarydata for 2002 show that French imports of U.S. hardwood remained strong despite a high dollar value and increased competition from both domestic production and imports. Note that the American Hardwood Export Council (AHEC) reports that consumption of American hardwood is far larger in France than the official statistics of 50,000-60,000 cubic meters per year. The French Wood Importers Federation believe the real consumption of American hardwood in France is close to 100,000 cubic meters, with many shipments coming through third countries (mostly Belgium), and some direct sales to manufacturers that may be mis-classified in the Customs data.

French wood buyers purchase predominantly white oak, although its share is declining due to competition from French white oak, while red oak and western red alder are up. Cherry is more often purchased as logs, and cherry lumber and veneer imports into France are declining. In the future, U.S. wood exporters will have to compete with French wood producers, as domestic production of precious temperate hardwood increases. The U.S. are also facing increasing competition from other EU countries as well as from Eastern European countries, mainly former Yugoslavia, Slovakia, Czech republic and Romania.Such competition is likely to be strenghtened especially when some of those countries join the European Union in May 2004. However, trade sources indicate that French red cherry is likely to be both lower in quality and in quantity in forthcoming years, increasing the potential for U.S. red cherry exports to France. Sources also mentioned the inferior quality of red cherry imported from eastern Europe (Slovakia, Romania).

The development of FSC schemes in the United States can also be an asset for U.S. hardwood exporters as more and more French users, under pressure from retailers and distributors, require their suppliers to provide certified wood and wood products.

Now widely known by French furniture manufacturers, American hardwood species still need to be made more popular with French architects, interior designers and joinery manufacturers. This is the current strategy of the American Hardwood Export Council . AHEC exhibited at the 2004 Carrefour du Bois wood show in Nantes, together with several American wood companies, and will exhibit again at the 2004 edition which will take place in May 2004 in Nantes.

One opportunity for U.S. exporters in France is to supply raw materials for the manufacture of wine barrels. Oak is used to manufacture 400,000 barrels per year (about 200,000 cubic meters of logs). Specifications for the type of wood differ by regions and by the type of wine the barrel will contain.

On the other hand, exports of U.S. softwood lumber and products to France is becoming increasingly difficult because of the strong competition from northern Europe exporters, because of the weakness of the Euros versus the U.S dollar.

U.S. exporters willing to expand their sales to France can either sell their products through an agent (which will make the contact with a French buyer), an importer (which will buy the wood, stock it and resale it) or directly to an end-user (usually a large wood product manufacturer).

Contact for US exporters looking for an agent/importer in France:
Mr. Eric Boilley, Director
Fédération Francaise des Bois Tropicaux et Americains
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**French Import Regulations for Furniture and Wood Products**
The French Technical Center for Wood and Furniture (CTBA: http://www.ctba.fr) develops and monitors French and EU standardization programs, and analyzes European rules and regulations in cooperation with the BNBA (National Bureau for Wood and Furniture). According to EU Sanitary rules which may also apply, some wood need to be accompanied by sanitary certificates issued in the United States by APHIS (http://www.aphis.usda.gov). Upon entry, wood shipment will be subject to sanitary control, both on the papers and on the shipment.

## Statistical Tables

### Softwood Logs

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| 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 | 18000 | 16834 | 15000 | 13000 | 0 | 13000 |
| Imports | 120 | 239 | 120 | 120 | 0 | 150 |
| TOTAL SUPPLY | 18120 | 17073 | 15120 | 13120 | 0 | 13150 |
| Exports | 800 | 800 | 400 | 400 | 0 | 500 |
| Domestic Consumption | 17320 | 16273 | 14720 | 12720 | 0 | 12650 |
| TOTAL DISTRIBUTION | 18120 | 17073 | 15120 | 13120 | 0 | 13150 |

| Import Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Softwood Logs | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | | U.S. | |
| Others | | Others | |
| Switzerland | 289211 | Switzerland | 329731 |
| Germany | 159568 | Germany | 153630 |
| Belgium | 74652 | Belgium | 62344 |
| Spain | 53188 | Spain | 135040 |
| | | | |

| | | | |
|---|---|---|---|
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 576619 | | 680745 |
| Others not Listed | 51393 | | 63645 |
| Grand Total | 628012 | | 744390 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Softwood Logs | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Exports for: | 2000 | | 2001 |
| U.S. | | U.S. | |
| Others | | Others | |
| Spain | 1130996 | Spain | 1089702 |
| Belgium | 423345 | Portugal | 554408 |
| Portugal | 400713 | Germany | 304134 |
| Germany | 313673 | Belgium | 280907 |
| Italy | 268596 | Italy | 268286 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 2537323 | | 2497437 |
| Others not Listed | 208478 | | 428292 |
| Grand Total | 2745801 | | 2925729 |

**Temperate Hardwood Logs**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| 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 | 9000 | 7876 | 8000 | 7000 | 0 | 6500 |
| Imports | 385 | 273 | 390 | 224 | 0 | 250 |
| TOTAL SUPPLY | 9385 | 8149 | 8390 | 7224 | 0 | 6750 |
| Exports | 1400 | 2053 | 1200 | 958 | 0 | 700 |
| Domestic Consumption | 7985 | 6096 | 7190 | 6266 | 0 | 6050 |
| TOTAL DISTRIBUTION | 9385 | 8149 | 8390 | 7224 | 0 | 6750 |

The two trade matrices below includes roundwood for pulp and therefore overestimates the real trade in temperate hardwood logs for lumbering and milling.

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Temperate Hardwood Logs | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | 17295 | U.S. | 24392 |
| Others | | Others | |
| Belgium | 667858 | Spain | 193337 |
| Spain | 172283 | Belgium/Lux | 129014 |
| Germany | 138525 | Germany | 90959 |
| Brazil | 46699 | Brazil | 32834 |
| Canada | 4147 | Switzerland | 14794 |
| Switzerland | 8763 | Netherlands | 6241 |
| | | Canada | 3361 |
| | | | |
| | | | |
| | | | |
| Total for Others | 1038275 | | 470540 |
| Others not Listed | 22286 | | 17497 |
| Grand Total | 1077856 | | 512429 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Temperate Hardwood Logs | | |
| Time period | Jan-Dec | Units: | Cubic Meters |

| Exports for: | 2001 | | 2002 |
|---|---|---|---|
| U.S. | 4337 | U.S. | 3601 |
| Others | | Others | |
| Belgium | 841385 | Belgium | 677292 |
| Italy | 593310 | Italy | 483779 |
| Germany | 500497 | Germany | 330359 |
| Spain | 254695 | Spain | 316313 |
| China | 205900 | Portugal | 109710 |
| Portugal | 139242 | China | 108614 |
| HongKong | 61420 | Luxemburg | 41758 |
| Luxemburg | 48710 | United Kingdom | 29625 |
| Switzerland | 31681 | Canada | 18617 |
| Austria | 18782 | Switzerland | 17589 |
| Total for Others | 2695622 | | 2133656 |
| Others not Listed | 105187 | | 105850 |
| Grand Total | 2805146 | | 2243107 |

**Tropical Hardwood Logs**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| Commodity | Tropical 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 | 0 | 0 | 0 | 0 | 0 | 0 |
| Imports | 860 | 735 | 860 | 457 | 0 | 500 |
| TOTAL SUPPLY | 860 | 735 | 860 | 457 | 0 | 500 |
| Exports | 40 | 29 | 40 | 17 | 0 | 20 |
| Domestic Consumption | 820 | 706 | 820 | 440 | 0 | 480 |
| TOTAL DISTRIBUTION | 860 | 735 | 860 | 457 | 0 | 500 |

| Import Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Tropical Hardwood Logs | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2001 | | 2002 |

| | | | |
|---|---|---|---|
| U.S. | | U.S. | |
| Others | | Others | |
| Gabon | 473941 | Gabon | 438835 |
| Liberia | 120445 | Liberia | 92840 |
| Equatorial Guinea | 97298 | Cameroon | 52375 |
| Cameroon | 51818 | Equatorial Guinea | 46136 |
| Congo | 27016 | Congo | 33018 |
| Central African Republic | 11502 | Central African Republic | 11894 |
| Dem. Rep. of Congo | 10499 | Dem. Rep. of Congo | 4138 |
| Belgium | 8472 | | |
| | | | |
| | | | |
| Total for Others | 800991 | | 679236 |
| Others not Listed | 8925 | | 17303 |
| Grand Total | 809916 | | 696539 |

**Softwood Lumber**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| 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 | 8000 | 7547 | 8000 | 7500 | 0 | 7450 |
| Imports | 2500 | 2369 | 2500 | 2344 | 0 | 2350 |
| TOTAL SUPPLY | 10500 | 9916 | 10500 | 9844 | 0 | 9800 |
| Exports | 700 | 726 | 700 | 767 | 0 | 800 |
| Domestic Consumption | 9800 | 9190 | 9800 | 9077 | 0 | 9000 |
| TOTAL DISTRIBUTION | 10500 | 9916 | 10500 | 9844 | 0 | 9800 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Softwood Lumber | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Exports for: | 2000 | | 2001 |

| | | | |
|---|---|---|---|
| U.S. | 379 | U.S. | 15 |
| Others | | Others | |
| Spain | 223699 | Spain | 277131 |
| Belgium | 91041 | Belgium | 97165 |
| Italy | 70149 | Italy | 76980 |
| Germany | 56786 | Germany | 52294 |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 441675 | | 503570 |
| Others not Listed | 180174 | | 98887 |
| Grand Total | 622228 | | 602472 |

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Softwood Lumber | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | 8124 | U.S. | 6138 |
| Others | | Others | |
| Finland | 817312 | Finland | 815026 |
| Germany | 611571 | Germany | 661904 |
| Russia | 446715 | Russia | 424166 |
| Sweden | 386652 | Sweden | 403896 |
| Belgium | 155386 | Belgium | 179373 |
| Estonia | 133667 | Estonia | 113813 |
| | | Latvia | 81236 |
| | | | |
| | | | |
| | | | |
| Total for Others | 2551303 | | 2679414 |
| Others not Listed | 314433 | | 218463 |
| Grand Total | 2873860 | | 2904015 |

**Tropical Hardwood Lumber**

| PSD Table | | | | | | |
|---|---|---|---|---|---|---|
| Country | France | | | | | |
| Commodity | Tropical 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 | 250 | 223 | 250 | 180 | 0 | 200 |
| Imports | 450 | 396 | 420 | 306 | 0 | 350 |
| TOTAL SUPPLY | 700 | 619 | 670 | 486 | 0 | 550 |
| Exports | 40 | 40 | 40 | 26 | 0 | 30 |
| Domestic Consumption | 660 | 579 | 630 | 460 | 0 | 520 |
| TOTAL DISTRIBUTION | 700 | 619 | 670 | 486 | 0 | 550 |

| Import Trade Matrix | | | |
|---|---|---|---|
| Country | France | | |
| Commodity | Tropical Hardwood Lumber | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2001 | | 2002 |
| U.S. | | U.S. | |
| Others | | Others | |
| Brazil | 110847 | Brazil | 128316 |
| Cameroon | 67269 | Cameroon | 82790 |
| Malaysia | 52722 | Ivory Coast | 45612 |
| Ghana | 40377 | Ghana | 40572 |
| Ivory Coast | 34944 | Malaysia | 37619 |
| Belgium | 16864 | Belgium | 25060 |
| | | | |
| | | | |
| | | | |
| | | | |
| Total for Others | 323023 | | 359969 |
| Others not Listed | 52632 | | 69208 |
| Grand Total | 375655 | | 429177 |

**Temperate Hardwood Lumber**

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| 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 | 3000 | 2395 | 3000 | 2320 | 0 | 2100 |
| Imports | 350 | 267 | 360 | 199 | 0 | 150 |
| TOTAL SUPPLY | 3350 | 2662 | 3360 | 2519 | 0 | 2250 |
| Exports | 800 | 546 | 800 | 540 | 0 | 370 |
| Domestic Consumption | 2550 | 2116 | 2560 | 1979 | 0 | 1880 |
| TOTAL DISTRIBUTION | 3350 | 2662 | 3360 | 2519 | 0 | 2250 |

(Note: Discrepancies between the PS&D and trade matrices is mainly due to the fact that different products including tropical hardwood lumber are listed as temperate hardwood lumber trade in customs data while some temperate hardwood lumber trade is listed under other categories. It can also explained by the fact that Post has used an average conversion coefficient to convert MT into Cubic Meters)

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Temperate Hardwood Lumber | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | 45869 | U.S. | 33813 |
| Others | | Others | |
| Belgium | 23914 | Belgium | 16593 |
| Germany | 20436 | Canada | 13082 |
| Canada | 14496 | Germany | 15192 |
| Poland | 8930 | Italy | 10757 |
| Italy | 5555 | Poland | 9103 |
| Slovakia | 4726 | Slovakia | 8320 |
| Switzerland | 3397 | Russia | 7079 |
| Spain | 1444 | Switzerland | 6851 |
| | | Spain | 6358 |
| | | Romania | 5873 |
| Total for Others | 82898 | | 99208 |
| Others not Listed | 91352 | | 94914 |

| | | | |
|---|---|---|---|
| Grand Total | 220119 | | 227935 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Temperate Hardwood Lumber | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Exports for: | 2000 | | 2001 |
| U.S. | 2232 | U.S. | 2464 |
| Others | | Others | |
| Spain | 218004 | Spain | 179505 |
| Belgium | 168168 | Belgium | 151063 |
| Germany | 156342 | Germany | 118338 |
| China | 103466 | Netherlands | 97986 |
| Netherlands | 100047 | China | 97602 |
| Italy | 72882 | IUnited Kingdom | 71806 |
| Portugal | 66521 | Morocco | 46507 |
| United Kingdom | 75730 | Italy | 44009 |
| Hongkong | 65235 | Portugal | 32273 |
| Morocco | 45275 | Luxemburg | 28262 |
| Total for Others | 1071670 | | 867351 |
| Others not Listed | 89703 | | 150369 |
| Grand Total | 1163605 | | 1020184 |

**Total Plywood**

The PS&D and trade matrices below pertains to total plywood production and trade. No specific data were available for softwood and hardwood plywood production.

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| Commodity | Hardwood 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 | 480 | 508 | 480 | 503 | 0 | 500 |
| Imports | 400 | 356 | 390 | 340 | 0 | 340 |
| TOTAL SUPPLY | 880 | 864 | 870 | 843 | 0 | 840 |

| | | | | | | |
|---|---|---|---|---|---|---|
| Exports | 290 | 200 | 300 | 183 | 0 | 200 |
| Domestic Consumption | 590 | 664 | 570 | 660 | 0 | 640 |
| TOTAL DISTRIBUTION | 880 | 864 | 870 | 843 | 0 | 840 |

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Hardwood Plywood | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | 11218 | U.S. | 10457 |
| Others | | Others | |
| Indonesia | 86362 | Indonesia | 75229 |
| Finland | 68697 | Finland | 61530 |
| Brazil | 42646 | Brazil | 48292 |
| Belgium | 25998 | Belgium | 34072 |
| Germany | 25684 | Germany | 28642 |
| Russia | 19112 | Italy | 21060 |
| Italy | 14909 | Russia | 13794 |
| Spain | 13277 | Baltic States | 12238 |
| Ivory Coast | 11752 | Ivory Coast | 11752 |
| Malaysia | 10715 | Malaysia | 10889 |
| Total for Others | 319152 | | 317498 |
| Others not Listed | 67406 | | 83321 |
| Grand Total | 397776 | | 411276 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Hardwood Plywood | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Exports for: | 2000 | | 2001 |
| U.S. | | U.S. | |
| Others | | Others | |
| Netherlands | 94634 | Netherlands | 80109 |
| Germany | 73307 | Germany | 60907 |
| Italy | 35107 | Italy | 31516 |
| Spain | 21654 | Spain | 20009 |

| | | | |
|---|---|---|---|
| Belgium | 14218 | Switzerland | 10620 |
| Switzerland | 11667 | Belgium | 8425 |
| United Kingdom | 5392 | United Kingdom | 6747 |
| | | | |
| | | | |
| | | | |
| Total for Others | 255979 | | 218333 |
| Others not Listed | 17017 | | 14485 |
| Grand Total | 272996 | | 232818 |

**Total Veneer**

Data for hardwood veneer should be regarded cautiously as it seems that many veener producers, importers and exporters either are too small to be polled by the Ministry of Industry (thus are not included in official statistics) or mix their veneer data with other wood products data when they send their data to the Ministry. Moreover, conversion factors from MT to cubic meters and from square meters to cubic meters vary from one source to another. Post has chosen to use the following conversion factors

From MT to cubic meters : 3.2
From square meters to cubic meters: 1.6

Also note that, when calculated in value and not in volume, there are fewer differences between production and trade figures. Such discrepancies must be caused by biased conversion factors (see table below).

| | | | | | | |
|---|---|---|---|---|---|---|
| PSD Table | | | | | | |
| Country | France | | | | | |
| Commodity | Hardwood Veneer | | | | 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 | 158000 | 141 | 155000 | 140 | 0 | 140 |
| Imports | 17000 | 275 | 17000 | 280 | 0 | 280 |
| TOTAL SUPPLY | 175000 | 416 | 172000 | 420 | 0 | 420 |
| Exports | 8200 | 172 | 8500 | 180 | 0 | 190 |
| Domestic Consumption | 166800 | 244 | 163500 | 240 | 0 | 230 |
| TOTAL DISTRIBUTION | 175000 | 416 | 172000 | 420 | 0 | 420 |

| | | | |
|---|---|---|---|
| Import Trade Matrix | | | |
| Country | France | | |
| Commodity | Hardwood Veneer | | |

| | | | |
|---|---|---|---|
| Time period | Jan-Dec | Units: | Cubic Meters |
| Imports for: | 2000 | | 2001 |
| U.S. | | U.S. | |
| Others | | Others | |
| Finland | 44556 | Gabon | 76956 |
| Gabon | 44156 | Finland | 53734 |
| Portugal | 35033 | Portygal | 25843 |
| Spain | 26083 | Spain | 25462 |
| Belgium | 15200 | Belgium | 12284 |
| Germany | 13440 | Germany | 11795 |
| Italy | 11516 | Italy | 9276 |
| | | | |
| | | | |
| | | | |
| Total for Others | 189984 | | 215350 |
| Others not Listed | 51849 | | 60512 |
| Grand Total | 241833 | | 275862 |

| | | | |
|---|---|---|---|
| Export Trade Matrix | | | |
| Country | France | | |
| Commodity | Hardwood Veneer | | |
| Time period | Jan-Dec | Units: | Cubic Meters |
| Exports for: | 2000 | | 2001 |
| U.S. | 1235 | U.S. | 2003 |
| Others | | Others | |
| Italy | 84041 | Italy | 94374 |
| Germany | 25769 | Germany | 15414 |
| Belgium | 12329 | Belgium | 10675 |
| Spain | 7190 | Spain | 8563 |
| HongKong | 5830 | Denmark | 4704 |
| Portugal | 5622 | United Kingdom | 3603 |
| Austria | 5260 | HongKong | 3568 |
| Denmark | 4505 | Portugal | 3017 |
| United Kingdom | 4259 | Austria | 2646 |
| | | | |
| Total for Others | 154805 | | 146564 |
| Others not Listed | 29944 | | 23925 |

| | | | |
|---|---|---|---|
| Grand Total | 185984 | | 172492 |

**Particle Board**

Note that an unnacounted part of imports from Belgium are in fact imports from non EU countries (including the United States) which are unloaded and Customs-cleared at the port of Antwerp.

**Particle board (including OSB) PS&D table and trade matrices**

| Year | 2001 | 2002 | 2003 | Units |
|---|---|---|---|---|
| Production | 3,814 | 3,700 | 3,400 | ‘000 Cubic Meters |
| Imports | 705 | 700 | 570 | ‘000 Cubic Meters |
| Total Supply | 4,519 | 4,400 | 3,970 | ‘000 Cubic Meters |
| Export | 1,255 | 1,318 | 1,300 | ‘000 Cubic Meters |
| Dom. Consumption | 3,264 | 3,082 | 2,670 | ‘000 Cubic Meters |
| Total Uses | 4,519 | 4,400 | 3,970 | ‘000 Cubic Meters |

| OSB/Particle board exports | Units: MT | |
|---|---|---|
| | 2000 | 2001 |
| country | | |
| USA | | |
| Others countries: | | |
| Belgium | 60774 | 71032 |
| Netherlands | 33523 | 23359 |
| Germany | 162301 | 112720 |
| UK | 63395 | 82462 |
| Spain | 233978 | 189551 |
| Swiss | 54483 | 32560 |
| Total of others countries | 608454 | 511684 |
| Others not listed | 98253 | 122558 |
| Total | 706707 | 634242 |

| OSB/Particle board imports | Units: MT | |
|---|---|---|
| | 2000 | 2001 |
| country | | |
| USA | | |
| Others countries | | |
| Belgium | 201382 | 221780 |
| Germany | 83048 | 109392 |
| Austria | 16230 | 17705 |
| Total of others countries | 300660 | 348877 |
| Others not listed | 117349 | 80816 |
| Total | 418009 | 429693 |