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COMMISSION OF THE EUROPEAN COMMUNITIES

Brussels, 27.2.2008
SEC (2008) 262

COMMISSION STAFF WORKING DOCUMENT

Annex to the

**COMMUNICATION FROM THE COMMISSION TO THE COUNCIL AND THE
EUROPEAN PARLIAMENT ON INNOVATIVE AND SUSTAINABLE FOREST-
BASED INDUSTRIES IN THE EU**

A contribution to the EU's Growth and Jobs Strategy

{COM(2008) 113 final}

FOREST-BASED AND RELATED INDUSTRIES IN THE EU

The forest-based industries account for a production value of € 365 billion, with a value added of around € 120 billion and have more than 3 million employees working in 344 000 enterprises. Many parts of the forest-based industries play an essential role in maintaining sustainable employment in rural areas. In the woodworking and printing sectors, SMEs are predominant while in the manufacture of pulp, paper and paperboard the presence of larger firms is significant. Some of the larger EU pulp and paper corporations operate on a global basis with production units in Asia and in North and South America in addition to the European ones.

Table 1: Forest-based industries in EU 27: Structural data

2004	Production value Billion €	Value-added Billion €	Number of employees	Number of enterprises	Apparent labour productivity (Gross value-added per person employed) (1000 €)
Woodworking	115.0	34.6	1 310 000	197 000	26.4
Pulp and paper & converting	150.0	42.6	749 500	19 700	56.6
Printing	100.0	41.0	1 000 000	127 000	41.2
Forest-based industries TOTAL	365.0	118.2	3 059 500	343 700	38.6
Forest-based industries as % of total manufacturing	6.5	7.4	8.7	15.4	-

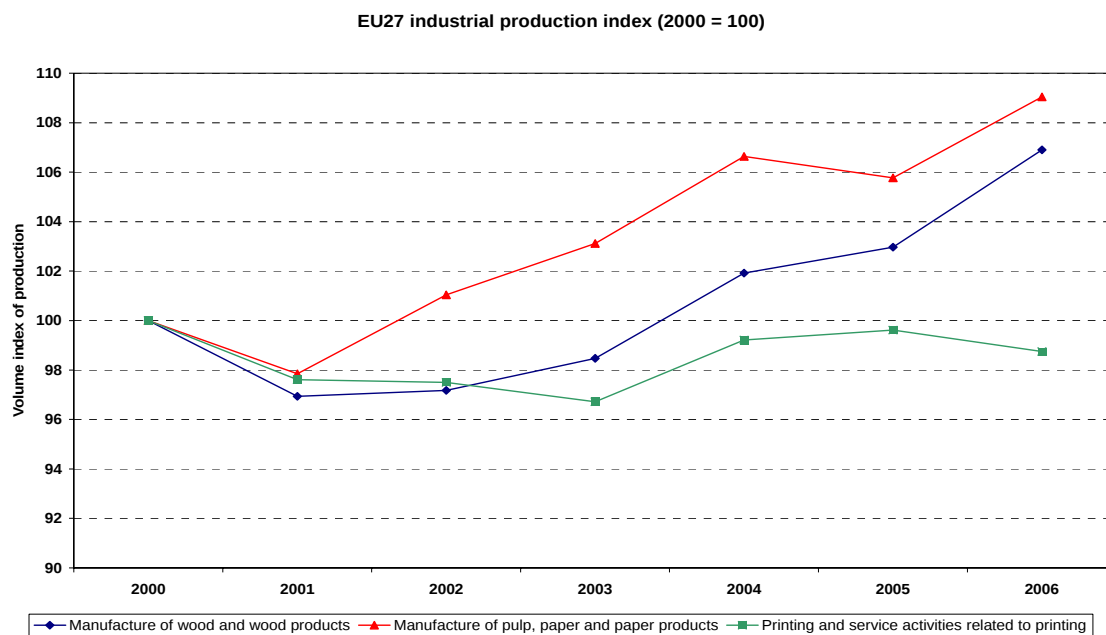
Source: Eurostat (Structural business statistics)

Table 2: Forest-based industries production in EU27

	Sawnwood	Wood-based panels	Pulp Production	Paper and paper board production	Recovered paper utilisation
2006	(1000 m³)	(1000 m³)	(1000 t)	(1000 t)	(1000 t)
Austria	10 507	3 449	1 928	5 213	2 384
Belgium	1 520	2 695	509	1 897	1 136
Bulgaria	569	347	135	326	225
Cyprus	4	3	0	0	5
Czech Republic	5 080	1 519	762	1 042	456
Denmark	196	345	0	423	168
Estonia	2 030	423	136	73	7
Finland	12 227	2 740	13 067	14 149	734
France	9 950	6 657	2 408	10 006	6 050
Germany	24 420	17 400	2 938	22 655	15 244
Greece	191	842	0	510	358
Hungary	186	720	0	553	419
Ireland	1094	937	0	45	0
Italy	1 748	5 740	502	10 008	5 578
Latvia	4 320	450	0	57	39
Lithuania	1 466	378	0	119	140
Luxemburg	133	450	0	0	0
Malta	0	0	0	0	0
Netherlands	265	10	109	3 367	2 346
Poland	3 607	7 356	1 061	2 857	1 019
Portugal	1 010	1 306	2 065	1 644	340
Romania	4 470	1 290	148	392	263
Slovakia	2 440	664	626	888	197
Slovenia	580	443	112	759	372
Spain	3 806	5 091	2 104	6 354	5 371
Sweden	18 000	841	12 240	12 066	2 037
United Kingdom	2 895	3 498	287	5 589	4 172
Total EU 27	112 715	64 927	41 137	100 992	49 061

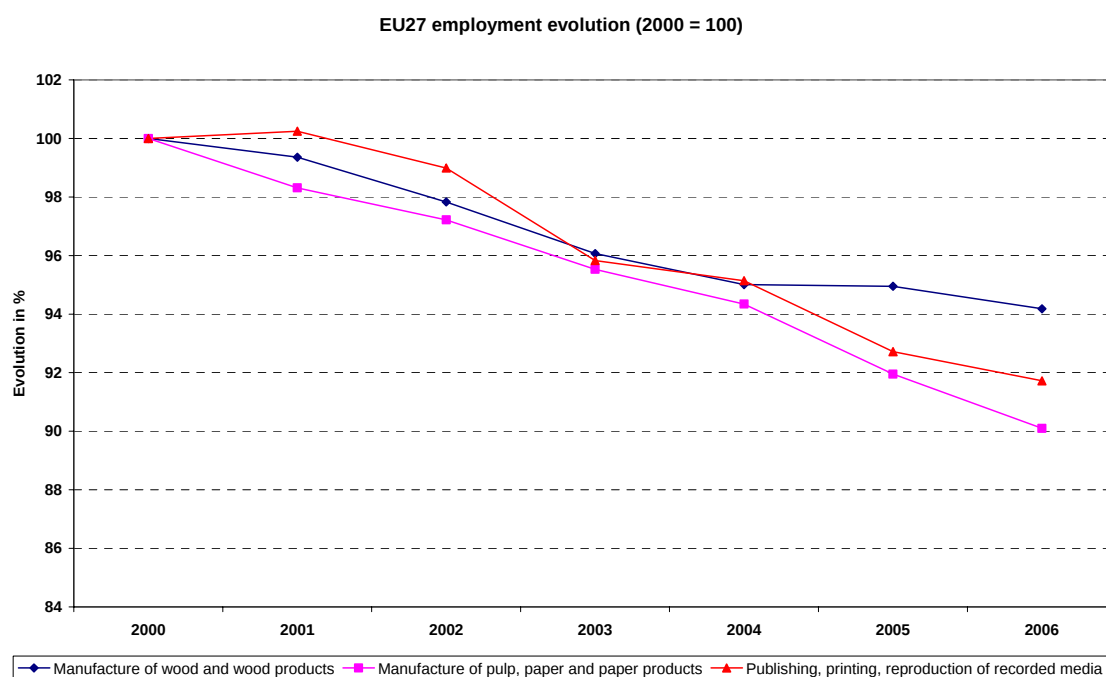
Source: Eurostat&CEPI

Figure 1: Forest-based industries production 2000 -2006 in EU 27



Source: Eurostat

Figure 2: Forest-based industries employment 2000-2006 in EU 27



Source: Eurostat

Table 3: Forest-based industries in EU 27. International trade 2000-2007

VALUE : 1000 €

	2000	2001	2002	2003	2004	2005	2006	2007*
WOOD AND WOOD PRODUCTS								
IMPORT	10 353 884	9 731 707	9 249 667	9 108 407	9 929 856	10 602 258	11 491 808	13 361 632
EXPORT	6 454 839	6 488 353	7 143 296	6 829 007	7 637 211	8 101 559	8 797 970	9 360 036
Balance	-3 899 045	-3 243 354	-2 106 371	-2 279 400	-2 292 644	-2 500 699	-2 693 838	-4 001 597
CORK AND CORK PRODUCTS								
IMPORT	106 404	88 468	69 793	84 973	80 538	66 776	68 548	64 509
EXPORT	479 114	489 909	495 376	462 658	453 711	420 224	421 366	443 751
Balance	372 709	401 441	425 583	377 685	373 173	353 448	352 817	379 242
PULP OF WOOD OR OF OTHER FIBROUS CELLULOSIC MATERIAL; RECOVERED PAPER OR PAPERBOARD								
IMPORT	6 371 202	5 182 850	4 547 561	4 166 742	4 242 637	4 387 404	4 724 911	4 842 470
EXPORT	1 118 446	1 025 435	1 078 468	1 145 018	1 445 471	1 554 533	1 966 828	2 276 367
Balance	-5 252 756	-4 157 415	-3 469 093	-3 021 724	-2 797 165	-2 832 871	-2 758 083	-2 566 103
PAPER AND PAPER PRODUCTS								
IMPORT	6 627 100	6 914 504	6 513 900	6 233 621	6 256 991	6 544 334	6 607 543	7 653 523
EXPORT	14 949 437	14 979 993	15 431 297	15 477 330	16 568 257	16 673 165	18 515 100	18 715 233
Balance	8 322 337	8 065 489	8 917 397	9 243 709	10 311 266	10 128 831	11 907 557	11 061 710
PRINTED PRODUCTS								
IMPORT	2 768 347	2 662 070	2 582 233	2 361 828	2 557 481	2 776 410	2 997 099	3 160 351
EXPORT	5 162 409	5 328 395	5 332 583	5 103 293	5 286 236	5 321 681	5 613 675	5 803 146
Balance	2 394 063	2 666 325	2 750 350	2 741 466	2 728 755	2 545 271	2 616 576	2 642 795

Source: Eurostat.

* Estimated

Table 4: Top 3 suppliers to EU 27 of wood, paper and printed products (1000 €)

		2000		2001		2002		2003		2004		2005		2006		2007*	
		Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share
TOP 3 SUPPLIERS OF WOOD AND WOOD PRODUCTS																	
EXTRA EU 27		10 353 884	100.0	9 731 707	100.0	9 249 667	100.0	9 108 407	100.0	9 929 856	100.0	10 602 258	100.0	11 491 808	100	13 361 632	100
Russia	1	1 440 702	13.9	1 433 947	14.7	1 491 669	16.1	1 573 616	17.3	1 770 255	17.8	1 999 223	18.9	2 122 914	18	2 508 318	18.8
China	2	530 417	5.1	590 296	6.1	654 710	7.1	738 054	8.1	968 447	9.8	1 324 508	12.5	1 686 231	15	2 277 288	17
Brazil	3	744.493	6.9	754.226	7.5	697.405	7.2	689.740	7.2	841.845	8.1	841.890	7.6	872 112	8	1 115 076	8.3
TOP 3 SUPPLIERS OF PAPER AND PAPER PRODUCTS																	
EXTRA-EU 27		6 627 100	100.0	6 914 504	100.0	6 513 900	100.0	6 233 621	100.0	6 256 991	100.0	6 544 334	100.0	6 607 543	100	7 653 523	100
Switzerland	1	1 397 663	21.1	1 496 080	21.6	1 469 488	22.6	1 505 054	24.1	1 454 100	23.2	1 415 455	21.6	1 372 790	21	1 376 836	18
USA	2	1 539 680	23.2	1 438 327	20.8	1 237 356	19.0	1 101 468	17.7	1 049 306	16.8	1 134 193	17.3	1 114 960	17	1 247 272	16.3
China	3	337.397	5.1	379.960	5.5	377.559	5.8	425.731	6.8	510.707	8.2	691.441	10.6	815 550	12	1 187 700	15.5
TOP 3 SUPPLIERS OF PRINTED PRODUCTS																	
EXTRA EU 27		2 768 347	100.0	2 662 070	100.0	2,582,233	100.0	2 361 828	100.0	2 557 481	100.0	2 776 410	100.0	2 997 099	100	3 160 351	100
USA	1	1 296 028	46.8	1 235 072	46.4	1 120 651	43.4	956 428	40.5	907 843	35.5	979 105	35.3	1 064 675	36	1 016 146	32.2
China	2	239 825	8.7	272 181	10.2	305 123	11.8	370 214	15.7	454 914	17.8	550 711	19.8	642 053	21	757 300	24
Switzerland	3	353 609	12.8	336 912	12.7	317 714	12.3	295 215	12.5	321 238	12.6	332 512	12.0	346 835	12	332 550	10.5

Source: Eurostat

*Estimated

Table 5: Top 3 export markets for wood, paper and printed products from EU 27 (1000 €)

		2000		2001		2002		2003		2004		2005		2006		2007*	
		Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share	Value	Share
TOP 3 MARKETS OF WOOD AND WOOD PRODUCTS																	
EXTRA EU 27		6 454 839	100.0	6 488 353	100.0	7 143 296	100.0	6 829 007	100.0	7 637 211	100.0	8 101,559	100.0	8 797 970	100	9 360 036	100
Norway	1	634 615	9.8	649 344	10.0	693 096	9.7	704 227	10.3	743 486	9.7	837 431	10.3	908 568	10	1 169 818	12.5
USA	2	911 370	14.1	1 104 513	17.0	1 416 370	19.8	1 257 536	18.4	1 581 742	20.7	1 815,014	22.4	1 660 607	19	1 120 159	12
Switzerland	3	768 553	11.9	750 187	11.6	754 917	10.6	782 723	11.5	838 446	11.0	890 339	11.0	1 005 845	11	1 085 091	11.6
TOP 3 MARKETS OF PAPER AND PAPER PRODUCTS																	
EXTRA EU 27		14 949 437	100.0	14 979 993	100.0	15 431 297	100.0	15 477 330	100.0	16 568 257	100.0	16 673 165	100.0	18 515 100	100	18 715 233	100
Russia	1	840 568	5.6	1 094 743	7.3	1 160 121	7.5	1 232 538	8.0	1 408 587	8.5	1 668 127	10.0	2 041 498	11	2 255 879	12.1
USA	2	2 607 666	17.4	2 399 463	16.0	2 456 435	15.9	2 411 927	15.6	2 531 513	15.3	2 420 307	14.5	2 491 952	13	2 194 867	11.7
Switzerland	3	1 653 364	11.1	1 696 741	11.3	1 704 787	11.0	1 629 101	10.5	1 647 881	9.9	1 624 538	9.7	1 718 257	9	1 772 992	9.5
TOP 3 MARKETS OF PRINTED PRODUCTS																	
EXTRA EU 27		5 162 409	100.0	5 328 395	100.0	5 332 583	100.0	5 103 293	100.0	5 286 236	100.0	5 321 681	100.0	5 613 675	100	5 803 146	100
Switzerland	1	1 054 433	20.4	1 050 033	19.7	1 032 557	19.4	1 009 057	19.8	1 052 871	19.9	1 085 432	20.4	1 149 481	20	1 110 846	19.1
USA	2	1 073 320	20.8	1 090 649	20.5	1 027 249	19.3	936 218	18.3	954 617	18.1	848 698	15.9	870 264	16	842 808	14.5
Russia	3	210 296	4.1	270 745	5.1	290 591	5.4	317 853	6.2	366 646	6.9	364 034	6.8	444 296	8	558 700	9.63

Source: Eurostat

*Estimated