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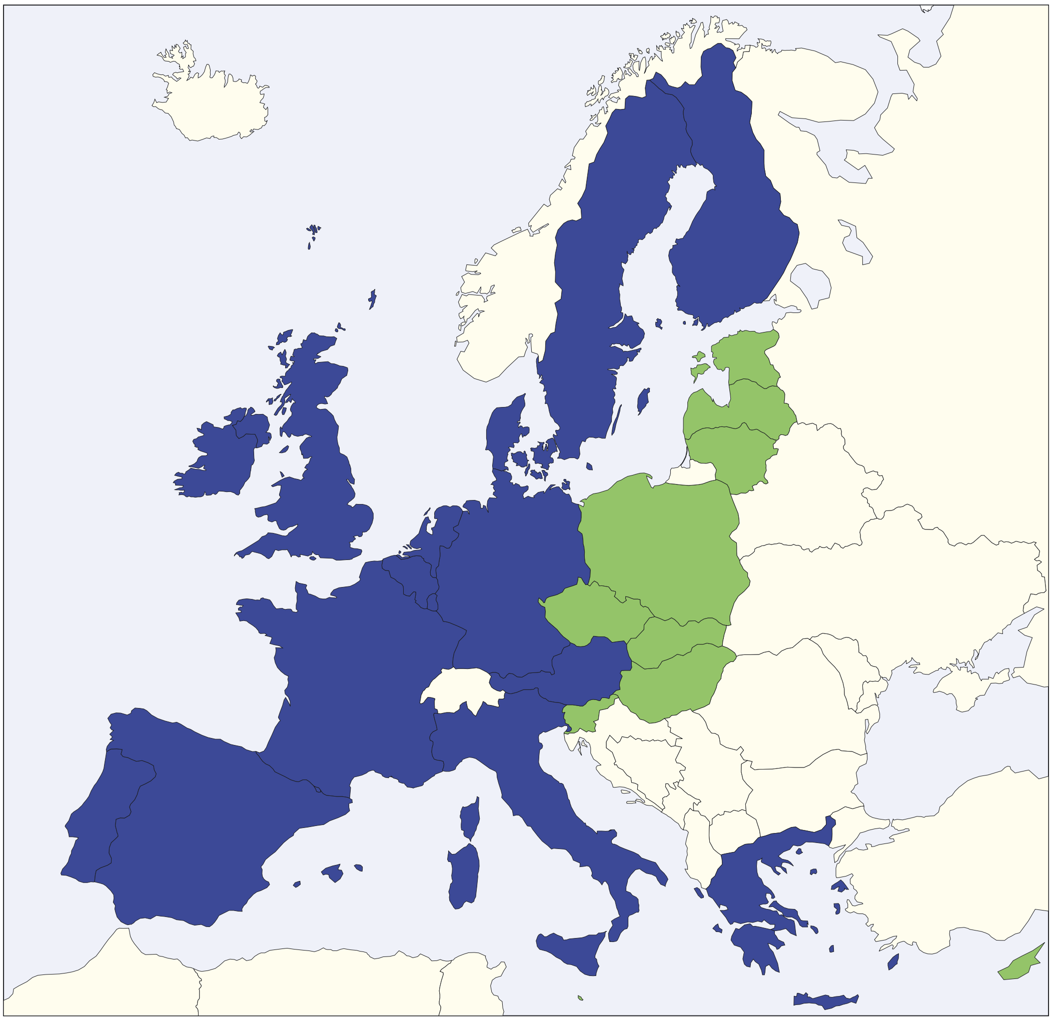
The EU enlargement in 2004: analysis of the forestry situation and perspectives in relation to the present EU and Sweden



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Skogsstyrelsen
NATIONAL BOARD OF FORESTRY

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The EU enlargement in 2004: analysis of the forestry situation and perspectives in relation to the present EU and Sweden

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During 2003 Mr. Arévalo participated in a Master's course
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This study was conducted during Mr. Arévalo's 10-week
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List of contents

SUMMARY

The European Union is to be enlarged with the accession of 10 new members on 1st May 2004. These countries are Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia.

Thus, 75 million people will be joining the common market, aimed to promote trade and to increase well-being and employment. The land area of the EU will be increased by 72 million hectares, i.e. a 25% increase.

With a total standing volume of about twice that in Sweden, the forest resources of the 10 new member countries are rather important. However, the features of their forests and products are rather different than Swedish ones.

In general, the trade of these countries with the EU has increased considerably during recent years. Nevertheless, with their accession in the EU, the levels of capital flow, trade and trans-national investments are expected to grow even more in coming years.

The enlargement is particularly relevant for Swedish forestry. The most important countries in terms of forest production and market of the 10 acceding countries are those that are close to Sweden: Estonia, Latvia, Lithuania, Poland, Czech Republic and Slovakia.

The conclusions of this report are highlighted in the following lines.

General

- Accession of 10 new members adds 75 million people to the European Union's Single Market. Poland (38 million) represents half of the acceding population.
- GDP per capita is much lower than in the present EU and Sweden. Enlargement is expected to increase the GDP of the accession countries as well as, to a lesser extent, the GDP of the current EU members.
- With 17% of the population, the acceding countries would have 26% of the votes in the European council according to Nice Treaty. Poland (27 votes) might represent for Sweden (10 votes) an important ally in forest-related strategies.

Forestry

- Accession of 10 new members adds 20% to the EU forest area.
- With a smaller forest area, the acceding countries have more wood in their forests than Sweden (standing volume per hectare and total). The closest new members to Sweden have especially well-stocked forests.
- Sustainable forest management will be a crucial task for acceding countries in coming years.
- Forests in acceding countries are more public-owned than the Swedish and EU average, although restitution processes are still occurring in some countries.

- Transitional arrangements allow the acceding countries to maintain their national legislation regarding purchase of forests by foreign individuals or companies.
- In general, and more to the centre-south (Hungary, Slovakia), the share of hardwood in acceding countries is bigger than in Sweden and the current EU.
- Harvests of industrial wood in all acceding countries together are 20% more than the harvests in Sweden.
- Poland, Czech Republic and Latvia are the largest harvesters of industrial wood. After them, Estonia, Slovakia and Lithuania also have important removals.

Forest industry and trade

- Acceding countries are net exporters of roundwood, mainly pulpwood but also logs. Latvia and Estonia are by far the largest exporters of pulpwood, and the Czech Republic is the largest exporter of logs.
- Swedish imports of pulpwood form Latvia (1 600 million SEK in 2002) are increasing every year, but it is due to the increasing transit of Russian wood.
- The foreseen drop in the Swedish imports of roundwood from the acceding countries might be replaced by (more) Russian roundwood, although the price is likely to rise.
- Except Hungary and Cyprus, the acceding countries are net exporters of sawnwood but net importers of pulp and paper. Hungary imports all forest products except furniture, whereas Cyprus imports all forest products.
- Latvia is the largest producer of sawnwood, both hard and softwood, followed by the Czech Republic and Poland. Latvia is the largest exporter of sawnwood, and Hungary the largest importer.
- The production of veneer sheets and wood-based panels is important in Poland (10% of the future European Union of 25 countries), and to a lesser extent in the Czech Republic.
- Although very far from Swedish production, pulp and paper production is relevant in Poland, Czech Republic and Slovakia, and only pulp in Slovenia and Hungary.
- Poland has a large trade in paper and wood-based panels.
- The furniture industry is very well-developed in the acceding countries. Poland, Czech Republic, Hungary and Slovakia are among the world's 15 largest exporters.

Trade perspectives

- Globalization is raising the trade of forest products as well as the "captive trade" within firms linked through Forest Direct Investments (FDI) or subcontracting.
- Even though trade statistics often obscure the captive trade, it seems to occur mainly in Poland with German investments, and in the Baltic States with Nordic ones.
- The geographical location of some current members, such as Germany, Austria, Sweden or Finland, will facilitate increased trade with the acceding countries.

- The exports of non-processed wood from forests from acceding countries are expected to decrease in a short and medium term as they shift towards more Value Added. In the case of the exports from Russia and other CIS (Commonwealth of Independent States) countries, this process will probably take more time.
- Estonia and Latvia will become an alternative EU access to Finland and other actual EU members for Russian timber.

Emerging markets

- In a global scale, a larger domestic market will increase the EU independence from others.
- Growth in consumption of forest products is forecasted to happen much faster in the acceding countries than in the current EU members.
- Countries where markets are especially interesting are Poland, the Czech Republic and Hungary, due to their larger population and in the last case also due to the dependency on imports of all forest products excepting furniture.
- Either through FDI or through subcontracting arrangements (including Original Equipment Manufacturers), there are, in the short and medium term, big opportunities for the needed transfer of technology.

Higher competitiveness

- From a business point-of-view, strong points of the acceding countries are low labour costs, availability of EU funding and well-developed forest education.
- Weak points are outdated production technologies, low energy efficiency, high energy dependency on fossil fuels and poor environmental performance.
- The competitiveness in the EU market of forest products will be much higher, especially due to the importer potential of Latvia, Estonia, Lithuania, Poland and the Czech Republic.
- In the short term, the competitiveness will increase rapidly in those sectors were less capital is needed: sawnwood, furniture and printing industries.
- The development of the pulp and paper industry in Estonia, Latvia and Lithuania will occur also in the short term, due to high competitiveness among foreign companies (FDI) and also among the three countries.
- In the medium and long term, the competitiveness will increase in general in those sectors where a very high capital is needed: wood-based panels, and pulp and paper.
- For current EU exporters, some ways to face this higher competitiveness are: To increase quality and specificity of products, to increase exports to non-EU current countries, to gain markets through certification and merchandising, or to invest in industries in the acceding countries (in order to make a profit, to enter into their markets, and to “captivate” trade for further processing or in order to avoid direct competition).

1. INTRODUCTION

1.1 EU expansion

On the 1st of May 2004, ten new member countries will join the European Union, forming a supra-national institution of 25 countries, 452 million people and 9 times the area of Sweden.

In addition, there are three other candidate countries for the European Union. Negotiations with Romania and Bulgaria are taking place, and 2007 is the most likely date for their incorporation. With the third candidate, Turkey, the negotiations have not yet started.

Many changes have happened since the French Foreign Minister, Robert Schuman, in 1950, proposed integrating the coal and steel industries of Western Europe. The European Coal and Steel Community was set up in 1951, with six members: Belgium, West Germany, Luxemburg, France, Italy and the Netherlands. A few years later, the same six countries decided to go further and integrate other sectors of their economies. In 1957, by means of the Treaties of Rome, the European Economic Community was created.

From the initial European Community of 6 countries to the European Community of 12, the incorporation of new members happened in the following sequence:

-Denmark, Ireland and the United Kingdom joined the European Community in 1973;

-the incorporation of Greece was in 1981;

-and Portugal and Spain acceded in 1986.

In 1990, the new East German *Länder* was incorporated. And in 1992, the Member States decided to form the European Union. Three years later, in 1995, Austria, Finland, and Sweden joined the EU, forming the present European Union of 15 countries (EU-15).

Finally, from May 2004 on, ten new members are about to join the European Union of 25 countries (EU-25). These countries are: Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia. These ten countries have been engaged in accession negotiations since 1998 (Cyprus, Estonia, Poland, the Czech Republic, Hungary and Slovenia) or 2000 (Malta, Latvia, Lithuania, Slovakia; also in the case of Romania and Bulgaria).

1.2 Results of the EU-acceding countries negotiations

One of the pillars of the European Union is the Single Market, formally completed at the end of 1992, although there are few exceptions (e.g. agriculture, financial services) where a truly free market among EU countries still does not exist. Nevertheless, the EU aims to create a genuine single market in which goods, services, people and capital can move around freely.

According to the European Commission's document *Report on the results of the negotiations on the accession of Cyprus, Malta, Hungary, Poland, the Slovak Republic, Latvia, Estonia, Lithuania, the Czech Republic and Slovenia to the European Union,* all acceding countries will take over and implement the EU regulations from the date of accession, although transitional arrangements limited in time and scope have been agreed individually with different acceding countries.

These transitional arrangements are numerous and should be studied carefully, although few of them seem to affect forestry, at least directly. As an example, in the case of free movements of persons, the real situation could be far from the theory, since all the current members are entitled to maintain their present requirements towards the nationals of all acceding countries excepting Malta and Cyprus, during 2 years and to review them up to 7 or more years. In addition, Germany and Austria can apply special measures in situations of serious disturbances of their labour market.

There are, also, delays in the application of the incompatible fiscal State aid, weights and dimensions of vehicles in Poland and Hungary, Nature protection, Integrated Pollution Prevention and Control (IPPC), etc.

A transitional arrangement in the free movement of capital clause allows the Czech Republic, Slovakia, Hungary, Lithuania, Latvia, Estonia and Poland to maintain their national legislation regarding the purchase of forests and agricultural land during 7 to 10 years, and 12 years in the case of Poland. Other measures affecting forestry are mainly related to rural development.

Also the financial assistance has been stipulated in the negotiations. Thus, the funding budgeted to assist the candidate countries over the period from 2000 to 2006 amounts to a total of 1 040 million Euro a year, through three different instruments: Phare (institutional building measures), ISPA (environment and transport) and Sapard (agricultural and rural development). In this case, one of the eligible measures for Sapard assistance is: "forestry and farm woodland projects, investments in private forest holdings, processing and marketing of forest products".

1.3 Prospects of the enlargement

Three key objectives of the enlargement are, according to the EU leaders: To create a larger free trade area, to increase the dynamism of the enlarged Union's economy and to extend a zone of stability and prosperity on the European Continent.

A study of the European Communities (2001) estimated that enlargement could increase the growth of accession countries' GDP by between 1.3 and 2.1% annually, and for the existing members it could increase the level of GDP by 0.7% on a cumulative basis.

The expected growth is already happening in the acceding countries, due mainly to the increasing exportations to the EU and the investments and financial aid coming from EU during years. In 2001, the GDP growth was positive in all the acceding countries excepting Malta (-0.8%), varying from 1.0% in Poland to 7.9% in Latvia. The forecast for the year 2004 was that all acceding countries would grow at least 3.7%, whereas EU-15 would grow 2.4%. (Source: Task Force Enlargement. Statistical Annex, Sept. 2003. Directorate General for Information, European Parliament). However, the economy world situation might lower these optimistic percentages.

The balance of trade between the EU and the acceding countries is favourable to the EU, and this difference between exports and imports has increased slightly during the last years. From 1995 to 2002, both EU imports from acceding countries and EU exports to acceding countries have increased by about 2.5 times (Source: Eurostat).

The already considerable volume of trade was boosted with the signing of the Association Agreements with the candidate countries (also known as Europe Agreements; see table 1). The objective was to establish a free-trade area by 2002, i.e. two years before the date of accession, liberalising trade in industrial products and providing a basis for economic co-operation in a large number of sectors.

Table 1. The Association Agreements by signing country and year. Source: European Commission

Country	Year
Malta	1970
Cyprus	1972
Hungary	1991
Poland	1991
Czech Republic	1993
Slovakia	1993
Estonia	1995
Latvia	1995
Lithuania	1995
Slovenia	1996

1.4 Purpose of the study

The aim of this report is to compile relevant information on forest-related resources in the acceding countries, and to analyse it in relation to EU and the Swedish position and possibilities in the European and global market.

2. MATERIALS AND METHODS

The area covered by this report is the 10 member countries that are joining the European Union in May 2004 as well as the current European Union of 15 countries. The report is focussed on the 10 acceding countries, on Sweden and on the EU-15 and EU-25 as a whole.

For the introduction, general information about the enlargement was collected from the European Commission home-page, as well as some more specific information about trade.

The data contained in the Results and Discussion are based mainly on two different sources. These sources were considered the most reliable and updated in relation to Europe's forests. For the general data and forest statistics, the MCPFE (Ministerial Conference on the Protection of Forests in Europe) publication *State of Europe's Forests 2003* was consulted. This document is available online at www.mcpfe.org.

For the forest industry figures, data from United Nation's Timber Committee of the Economic Commission for Europe were used, particularly the data from year 2002. Also this information is available online at www.unece.org/trade/timber.

These and the other consulted sources are detailed in the references. In addition, help and advice was provided by Stefan Karlsson, Surendra Joshi, Björn Merkell, Bert-Åke Näslund and Peter Blombäck, and the whole report was supervised by Lennart Ackzell.

In the Results and Discussion, the intention is to give a general overview of the forestry situation in the above-mentioned countries and to try to foresee the possible influence on Sweden and the European Union of the EU enlargement. However, besides the inherent difficulty of any kind of forecast, the limitation of time has not allowed us to go into greater detail about many aspects that seem to be very relevant and complex.

3. RESULTS AND DISCUSSION

3.1 General

3.1.1 Population

On the 1st of May 2004, 10 countries and 75 million people will join the European Union. In other words, 17% of the population of the enlarged EU will be from the 10 acceding countries, with a total EU-25 population of 452 million inhabitants. The Swedish population in the EU-25 will represent 1.95% of the total, in comparison with 2.34% in the current EU-15 (Fig. 1).

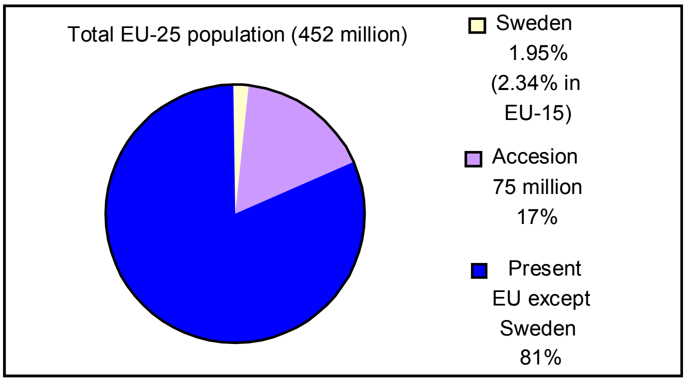

Fig. 1. Share of population in the enlarged EU-25: Sweden, acceding countries and present EU except Sweden. Source: MCPFE State of Europe's Forests 2003 (data from 2001).

By countries, three of the acceding ones are more populated than Sweden: Poland, the Czech Republic and Hungary. The 38 million Poles are about half of the total population of the 10 acceding countries, and more than 4 times the Swedish population. The populations of the Czech Republic and Hungary, 10 million, are slightly larger than Swedish one (Fig. 2).

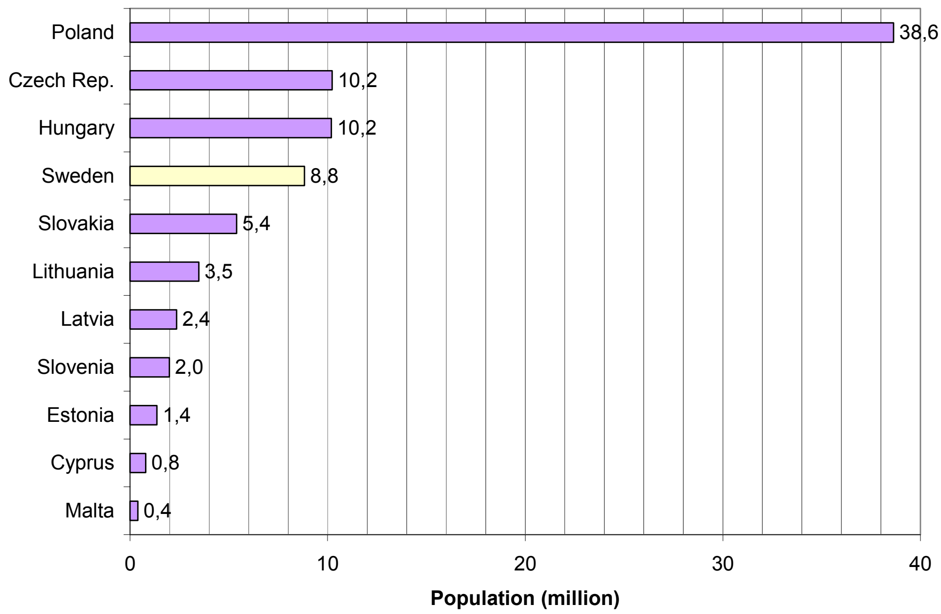

Fig. 2. Human population of the acceding countries and Sweden, in million inhabitants. Source: MCPFE State of Europe's Forests 2003 (data from 2001).

3.1.2 Land area

Sweden will still be the third largest country in the enlarged EU-25 (after France and Spain), due to the smaller size of the 10 acceding countries. Only Poland has a land area comparable with Sweden, 75% of the Swedish land area. About 20% of the EU-25 land area will be in the 10 acceding countries. Sweden's share of EU land area will drop from 13% to 11% (Figs. 3 and 4).

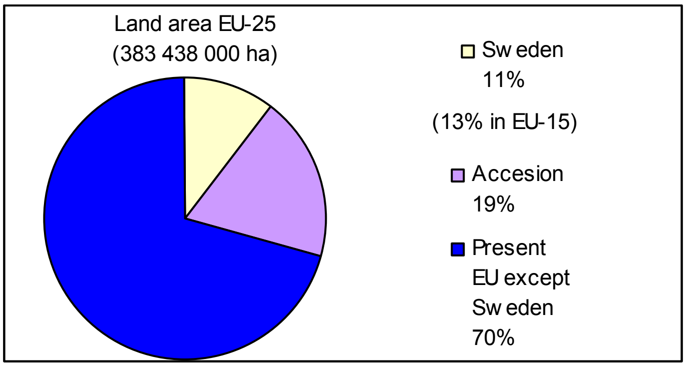

Fig. 3. Share of land area in the enlarged EU-25: Sweden, acceding countries and present EU except Sweden. According to FAO, "land area" refers to the total area of the country excluding inland water. Source: MCPFE State of Europe's Forests 2003.

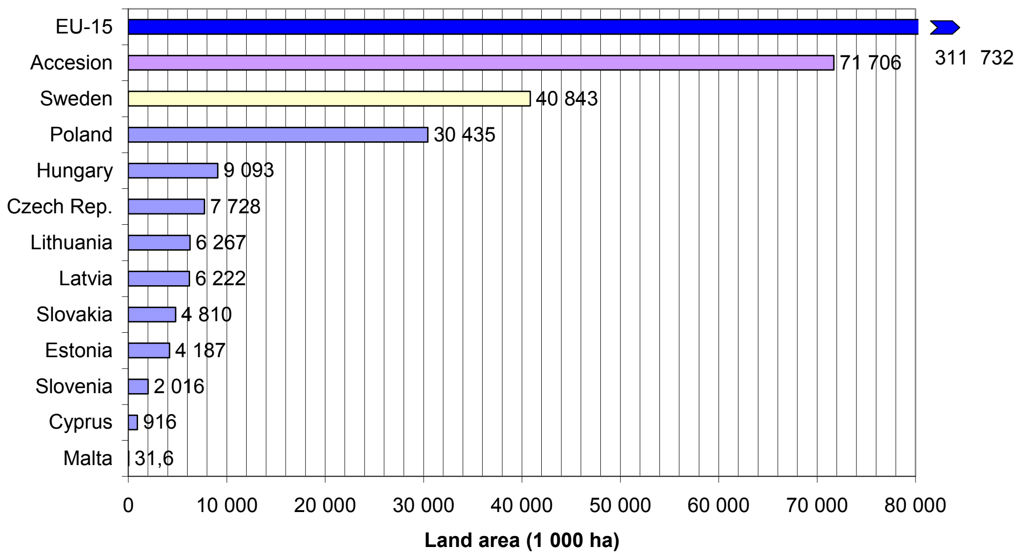

Fig. 4. Land area of the acceding countries, Sweden and present EU-15. According to FAO, "land area" refers to the total area of the country excluding inland water. Source: MCPFE State of Europe's Forests 2003.

3.1.3 GDP

The GDP per capita of the acceding countries is considerably lower than the Swedish and EU-15 ones, less than half on average (Fig. 5). Latvia has the lowest GDP per capita, 30% of the Swedish one, whereas Slovenia has the highest among the 10 acceding countries, nearly 70% of the Swedish GDP per capita.

The countries of the Baltic area are among the poorest, which means cheaper raw material (wood) and lower labour costs, but also less possibility for the purchase of Swedish forest products and technology. However, the forecasted rise of living standards in the acceding countries will increase the affordability of Swedish forest products.

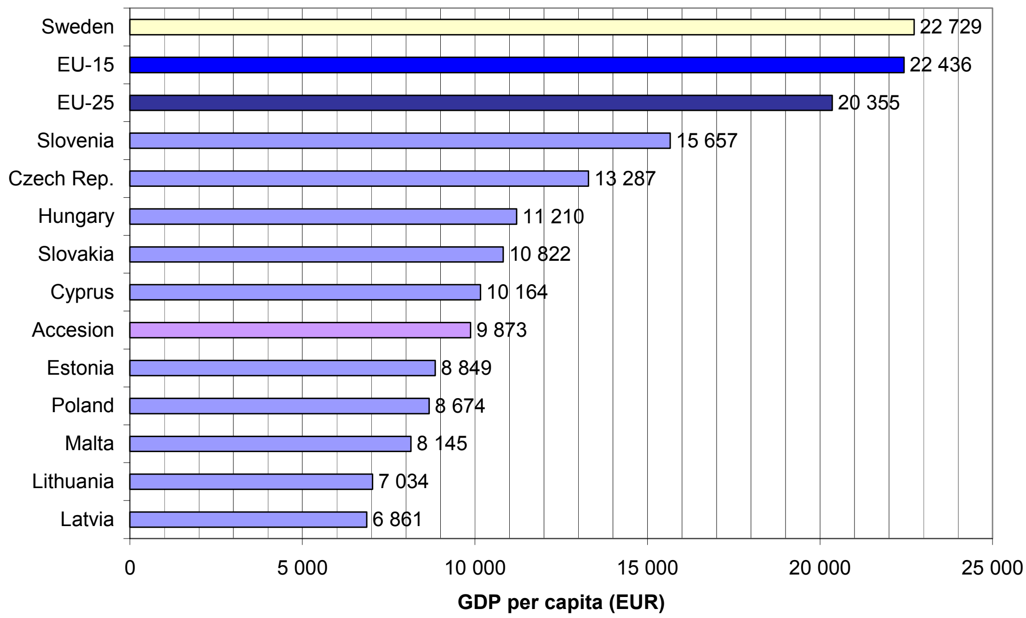

Fig. 5. GDP per capita of the acceding countries, Sweden, present EU-15 and future EU-25, in Euro. Source: MCPFE State of Europe's Forests 2003 (data from 2001).

The share of total GDP of the 10 acceding countries will be 8% in EU-25. By countries, Poland is the only one with a higher total GDP than Sweden, 40% more than Sweden. Among the others, only two countries, the Czech Republic and Hungary, have GDP levels that are greater than half of the Swedish GDP. Excepting Slovakia, the remaining 6 countries have less than a sixth of the Swedish GDP (Figs. 6 and 7).

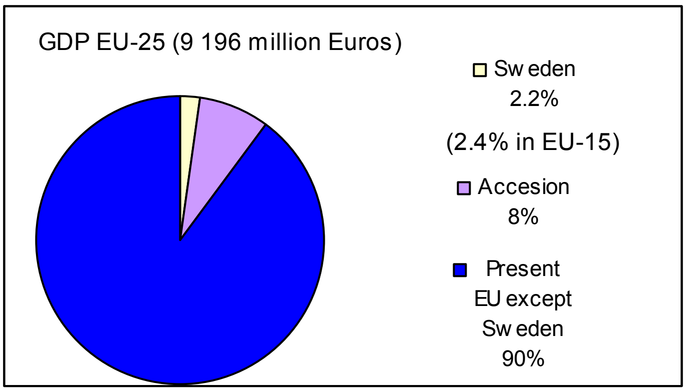

Fig. 6. Share of total GDP in the enlarged EU-25: acceding countries, Sweden and present EU except Sweden. Data of GDP per capita and population from MCPFE State of Europe's Forests 2003.

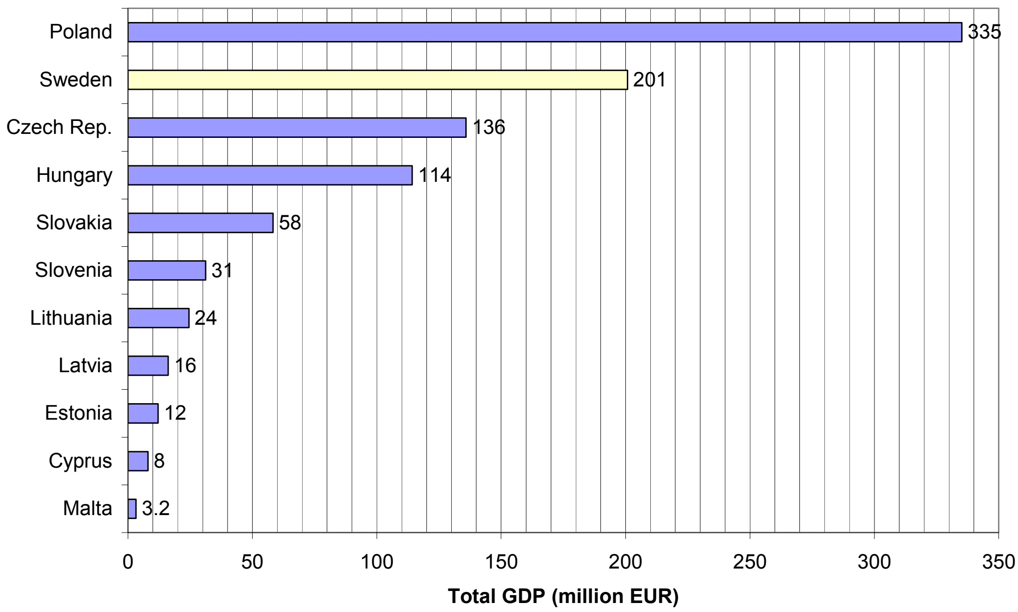

Fig. 7. Total GDP of the acceding countries and Sweden, in million Euro. Data of GDP per capita and population from MCPFE State of Europe's Forests 2003.

3.1.4 EU voting power

With 17% of EU-25 population, the acceding countries will have 26% of the votes in the European Council, according to Nice Treaty. The share of Swedish votes will drop from the current 4.6% (4 votes over a total of 87 in EU-15) to 3.1% (10 of 321). Three of the acceding countries, i.e. Poland (27 votes), Hungary and the Czech Republic (12 each) will have more strength than Sweden in the European Council, because of their bigger population (Fig. 8).

Among the acceding countries, only Poland (27 votes) could be considered as one of the so called "big countries". For Sweden, the enlargement could be a good opportunity for reinforcing its position and find new allies -especially Poland- in the Baltic region. However, this distribution of votes -and the weight of Poland- might change in the European Constitution, strengthening the power of Germany, UK, Italy and France.

The other two EU candidates, Romania and Bulgaria, would have 14 and 10 votes respectively, when they join the European Union, most likely in 2007. Then, the number of total votes will be 345, 24 more than in 2004.

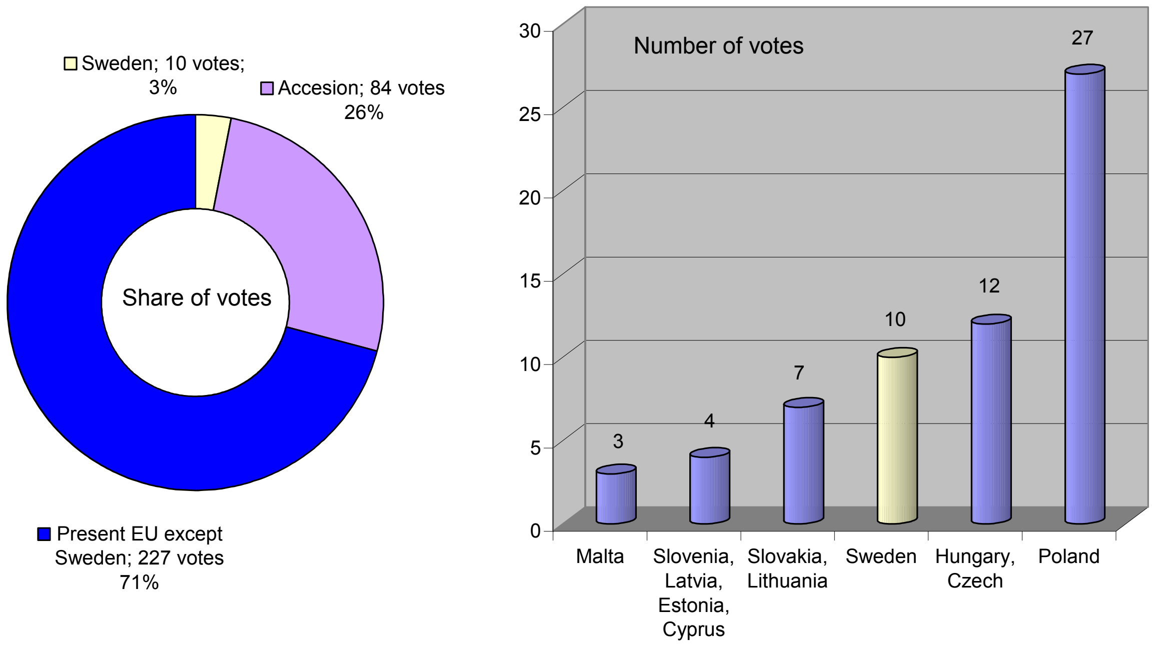

Fig. 8. Share and number of votes in 2004´s European Council according to Nice Treaty. Source: European Commission.

3.2 Forest statistics

Despite this report not focussing on the acceding forest management practises, it seems clear that sustainable forest management will be a crucial task for them. Illegal logging is still an important problem in some acceding countries, whereas a higher level of protection is needed in other acceding countries.

3.2.1 Forest area

Sweden has more forest area than all of the 10 acceding countries together. In the enlarged EU-25, Sweden will have 20% of the forest area, in comparison with 24% in the current EU-15, whereas the acceding countries will represent 17% of the forest area (Fig. 9).

By countries, Poland's forest area is about 40% of the forest area of all acceding countries, but only one-third of the Swedish forest area. After Poland, 6 countries (Latvia, Czech Republic, Slovakia, Lithuania, Estonia and Hungary) have between 3 and 1.8 million hectares of forests, representing 55% of the accession forest area. Slovenia has 1.1 million ha, whereas the forest area in Cyprus is 172 000 ha and in Malta only 350 ha (Fig. 10).

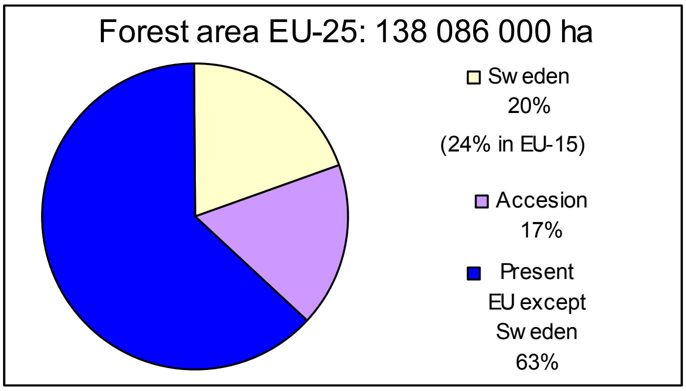

Fig. 9. Share of forest area in the enlarged EU-25: Sweden, acceding countries and present EU except Sweden. Source: MCPFE State of Europe's Forests 2003 (data from UNECE/FAO (2000) and updates).

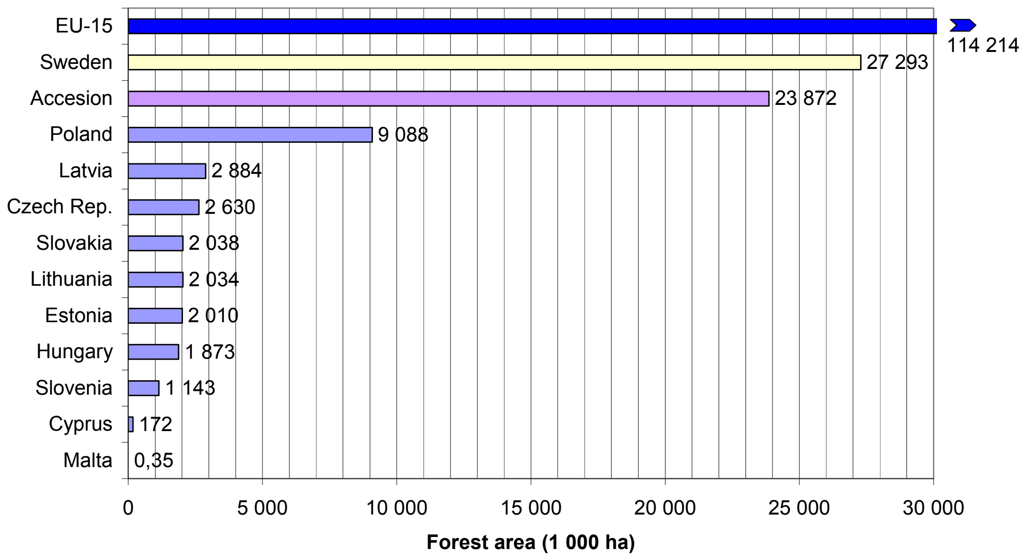

Fig. 10. Forest area of the acceding countries, Sweden and present EU-15, in thousand hectares. Source: MCPFE State of Europe's forests 2003 (data from UNECE/FAO (2000) and updates).

3.2.2 Share of forest and other wooded land in the total area

The share of forest and other wooded land (FOWL) in the total area of the country is shown in figure 11. Other wooded land, according to FAO's definition, refers to land either with shrub/bush or with a tree crown cover of 5-10%. On average, the share of FOWL in the total area is smaller in the acceding countries than in the current EU-15, and smaller therefore than in Sweden. The share is significantly lower in Malta (1%) and Hungary (20%). Other three countries have lower percentage than the EU-15 mean: Poland, Lithuania and Slovakia. The share in Poland, 29%, decreases significantly the mean of the acceding countries. Slovenia (68%), Estonia (48%) and Latvia (46%) have the highest shares of forest among the acceding countries, whereas Cyprus and Slovakia will have the same share (42%) of the current EU-15.

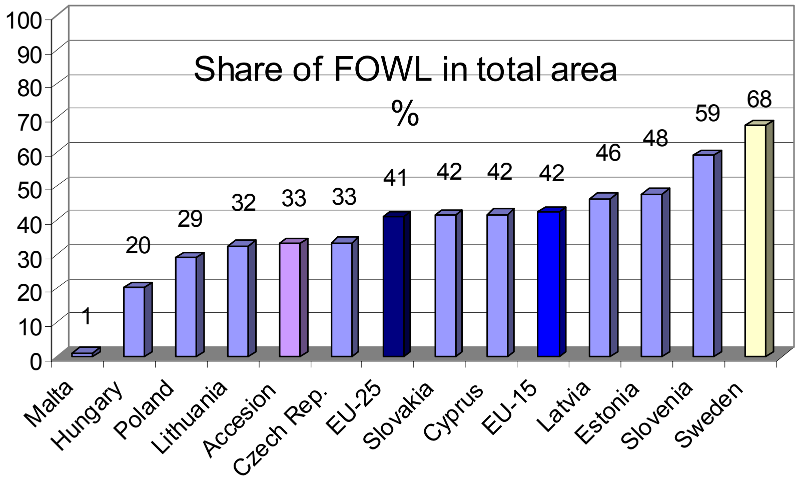

Fig. 11. Share of forest and other wooded land (FOWL) in the total area: Sweden, acceding countries, present EU-15 and future EU-25. Source: MCPFE State of Europe's Forests 2003 (data from UNECE/FAO (2000) and updates).

3.2.3 Standing volume

There is a high standing volume (amount of wood or growing stock) in the acceding countries´ forests, representing 26% of the future EU-25. In comparison with Sweden, in all these 10 countries together there is 40% more standing volume than in Sweden. By countries, Sweden still has more standing volume than any individual acceding country, and only Poland is comparable to Sweden with 70% of the Swedish standing volume. The closest countries to Sweden are especially well stocked in wood. In addition to Poland, three countries, the Czech Republic, Slovakia and Latvia have over 500 million m^3 of standing volume, whereas Lithuania, Hungary, Slovenia and Estonia have over 300 million m^3. Cyprus and Malta have very low standing volumes in relation to the other countries (Figs. 12 and 13).

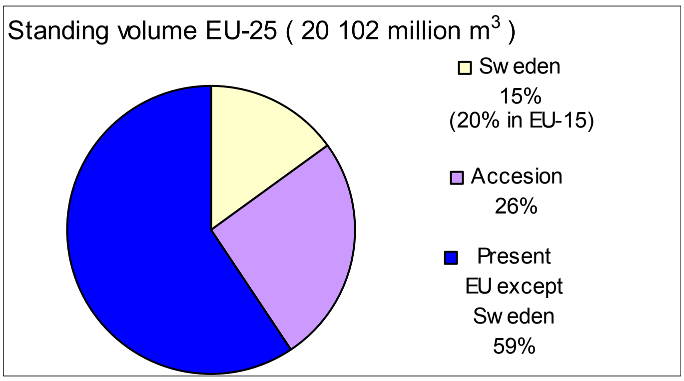

Fig. 12. Share of standing volume in EU-25´s forests: Sweden, acceding countries and present EU-15 except Sweden. Source: MCPFE State of Europe's Forests 2003 (data from UNECE/FAO 2001).

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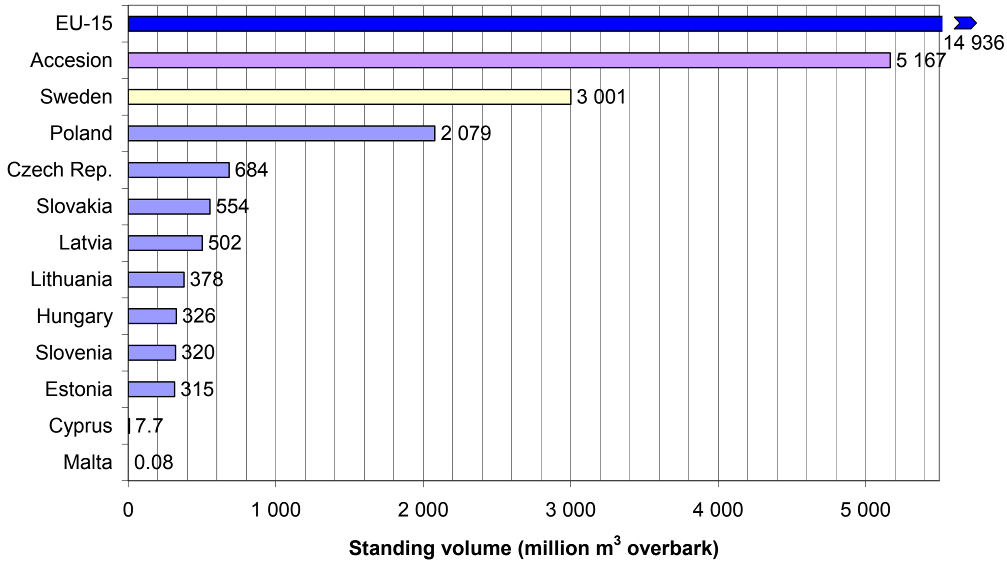

Fig. 13. Standing volume of the acceding countries, Sweden and present EU-15, in million m^3 over bark. Source: MCPFE State of Europe's Forests 2003 (data from UNECE/FAO 2001).

The reason for the high standing volume in relation to the forest area in the acceding countries is the high density of trees in their forests, with the only exception of Cyprus. Five of these countries (Slovenia, Slovakia, Czech Republic, Malta and Poland) have more than twice the stem volume per hectare in comparison with Sweden (Fig. 14).

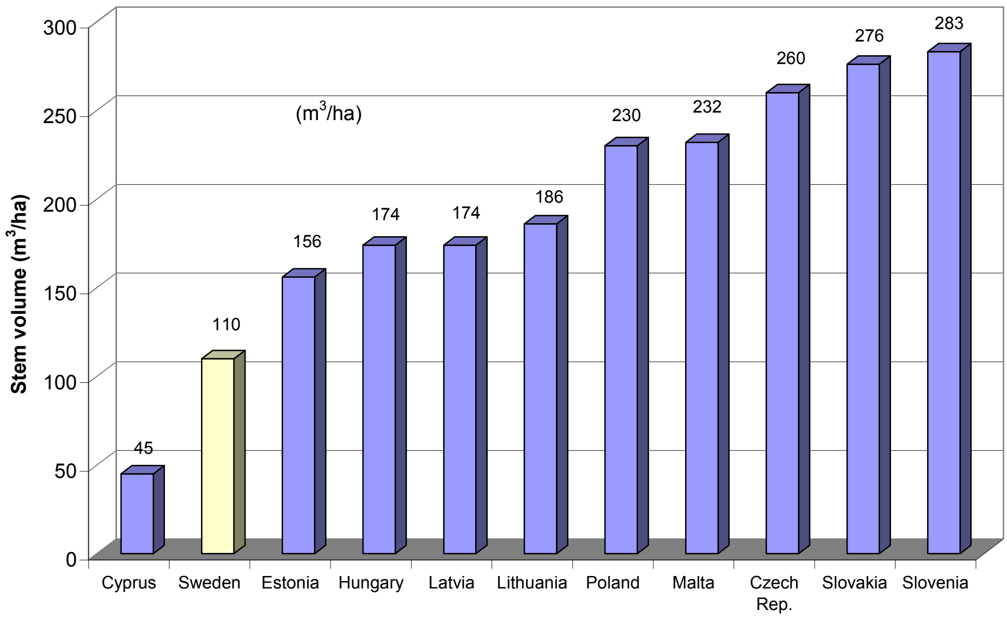

Fig. 14. Stem volume per hectare (m^3/ha) in the forests of the acceding countries and Sweden. Source: MCPFE State of Europe's Forests 2003 (data from UNECE/FAO 2001).

3.2.4 Ownership

In terms of forest ownership, the share of public forests in the EU will be increased with the enlargement. The public FOWL (forest and other wooded land) of the 10 acceding countries is larger than the average of EU (equal to the average in Slovenia), and all of them are larger than Swedish one. The share of public forests varies between 29% in Slovenia to 100% in Malta (Fig. 15). In most acceding countries the size of this public forest is a heritage of their former communist systems. However, in some of the countries a land restitution process has increased (Latvia to 49% according to the latest information) or is still increasing (e.g. Lithuania, with 50% estimated by the end of the process) the privately-owned forests. Due to this process, a category of “forests reserved for restitution” can be found for the time being, managed generally by the state forest service. In Estonia, 30% of forests remain in this category, and will probably be added to the state-owned forest if ownership rights are not provided.

Most of the acceding countries have negotiated with the European Commission the maintenance of their national legislation regarding purchase of forests for at least 7 years, in a transitional arrangement to the EU’s free movement of capital clause, aiming to avoid the purchase of cheap forest by other European individuals or companies.

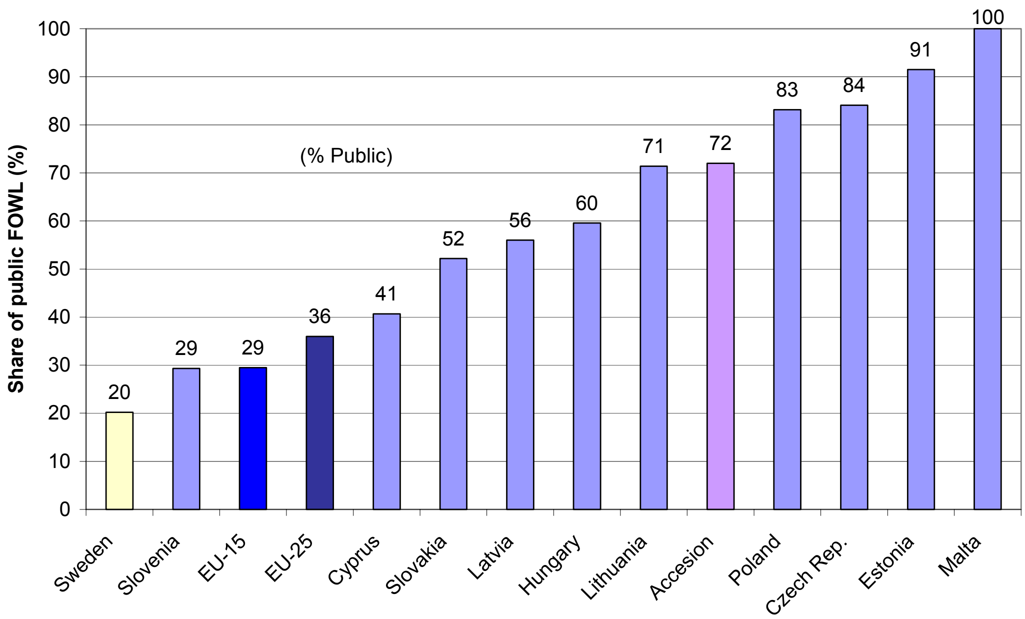

Fig. 15. Share of public forest and other wooded land (FOWL) in Sweden, acceding countries, present EU-15 and future EU-25. Source: MCPFE State of Europe’s Forests 2003 (data from UNECE/FAO (2000) and updates). The data included in this chart do not contain the latest figures, and changes in ownership may have occurred, especially in those countries involved in restitution processes (e.g. Latvia, Estonia or Lithuania).

3.3 Forestry

3.3.1 Harvests

3.3.1.1 Harvest of wood fuel

The total amount of wood harvested is classified according to UNECE/FAO in wood fuel and industrial wood. The category wood fuel includes chips and particles produced from wood in the rough and used for energy purposes, which has increasing importance and represents about 9% of the use of the wood in Sweden. However, observing the important differences among the acceding countries, it is unclear whether the figures on wood fuel in the acceding countries refer to the same type of use as in Sweden (domestic consumption such as firewood, etc). Analysing the share of wood fuel in the total wood harvested, we found that in the acceding countries it ranges between 4% in Slovakia till 41% in Hungary. The average of the acceding countries is 12%, more than the 9% of Sweden. The countries with a higher share of wood fuel than Sweden, in addition to Hungary, are Lithuania (23%), Estonia (18%) and Slovenia (12%) (Fig. 16).

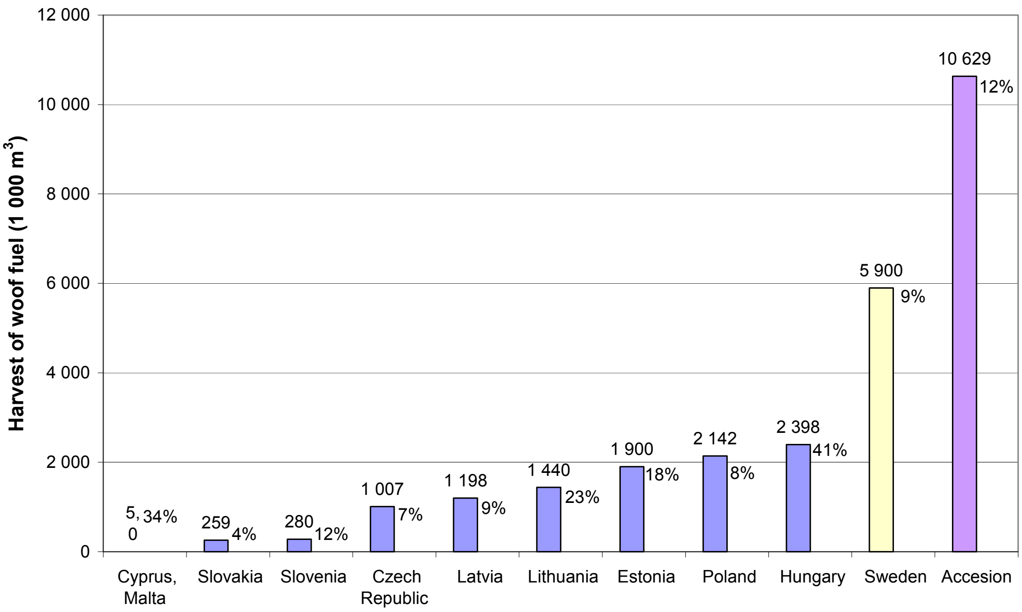

Fig. 16. Harvests of wood fuel in the acceding countries and Sweden, in thousand cubic meters. Wood fuel includes chips and particles produced from wood in the rough and used for energy purposes. The share of wood fuel in the total harvest (wood fuel + wood for industrial use) is also shown. Source: UNECE, Timber Committee. Data from 2002.

3.3.1.2 Harvest for industrial use

In 2002, the harvest of industrial wood in the 10 acceding countries was 75.2 million m^3, more than the 60.6 million m^3 of harvest of Sweden. The amount of industrial wood harvested in the 10 acceding countries would be 24 % of the future EU-25, and it is quite obvious that the volume of removals will increase in the near future. By countries, Poland harvested approximately one-third of the industrial wood of the acceding countries, equivalent to 40% of the Swedish harvest. Another third was harvested by the Czech Republic and Latvia, whereas the last third is the contribution of the remaining 7 countries, especially Estonia, Slovakia and Lithuania (Figs. 17 and 18). Thus, the main forestry activity in the acceding countries takes place in the north and central parts of Eastern Europe: Poland, Estonia, Latvia, Lithuania, Czech Republic and Slovakia.

Due to the rather low values of Cyprus and particularly Malta, their data will not always be present in the forest industry figures.

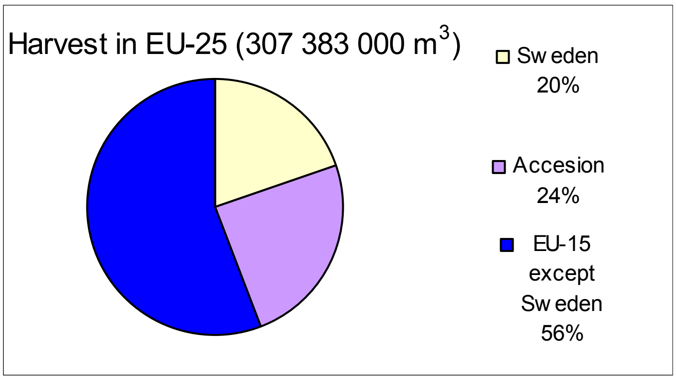

Fig. 17. Share of harvests of industrial wood in the enlarged EU-25: acceding countries, Sweden and present EU-15 except Sweden. Source: UNECE, Timber Committee. Data from 2002.

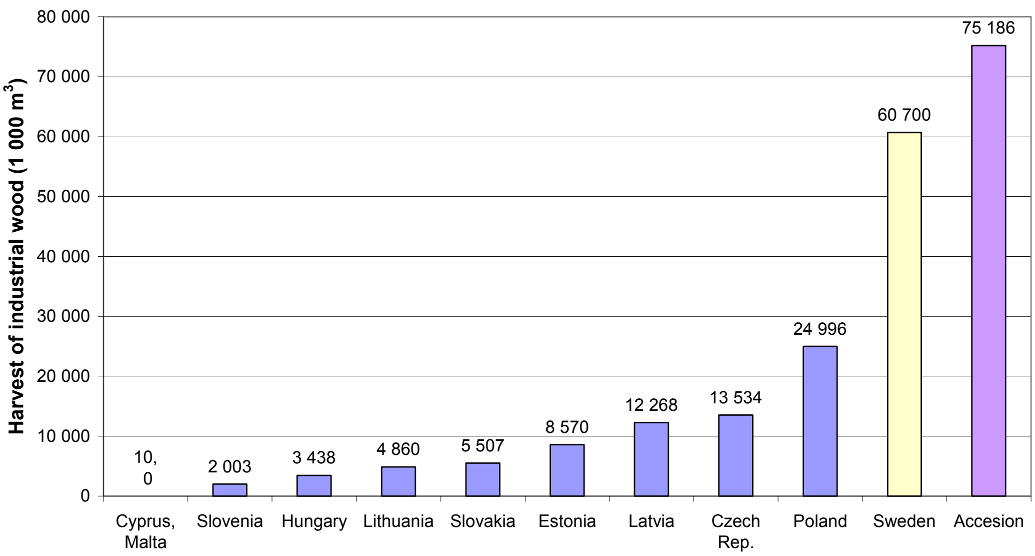

Fig. 18. Harvests of industrial wood in the acceding countries and Sweden, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002.

In figure 19, harvests of industrial wood are separated into hardwood and softwood. In acceding countries, 31% of the harvests were hardwood, which is more than the 19% in the current EU-15, and much more than the 6% of hardwood harvested in Sweden in 2002. By countries, most of the Hungarian harvests (83%) and half of the Slovakian harvests were hardwood. In Lithuania, Latvia, Slovenia and Estonia the percentage varied between 43% and 32%, whereas in Poland the share of hardwood was 25%. Finally, the Czech Republic had a lower proportion of hardwood harvest, 9%, being still larger than the Swedish proportion (6%).

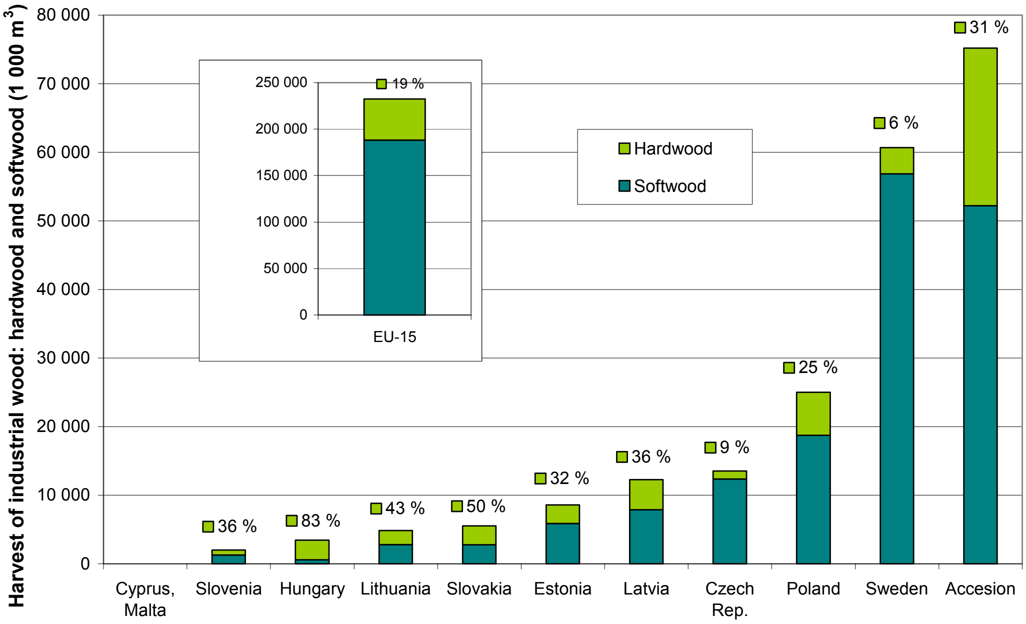

Fig. 19. Harvests of industrial softwood and hardwood in the acceding countries, Sweden and the EU-15, in thousand cubic meters, and share of hardwood. Source: UNECE, Timber Committee. Data from 2002.

In figure 20, the harvest of industrial wood is divided into pulpwood and logs (for sawn wood). Whereas in most of the countries, as well as Sweden, harvests are more for logs, the situation is the contrary in Poland, Estonia and Slovakia.

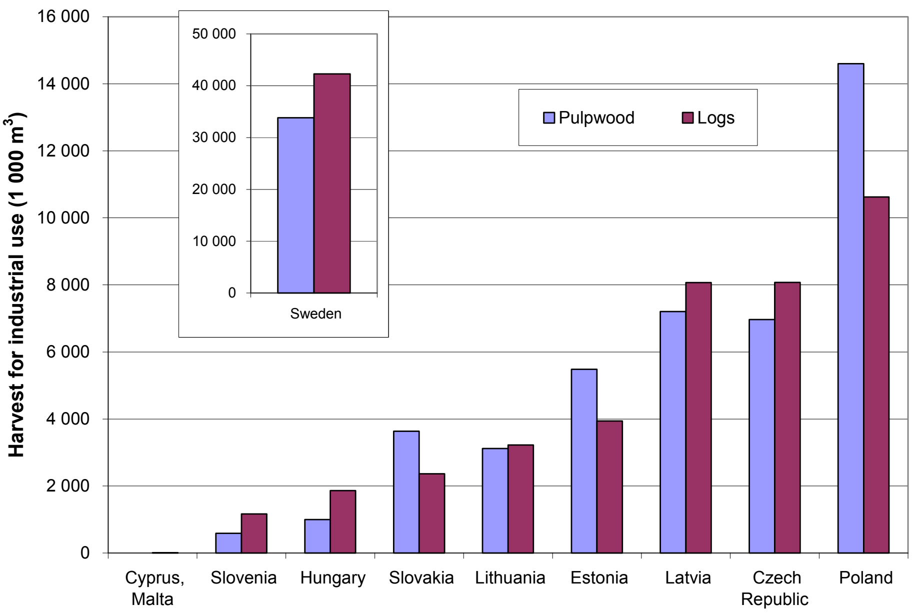

Fig. 20. Harvests of industrial wood in the acceding countries and Sweden, divided into pulpwood and logs, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002.

Thus, the amount of wood harvested for industrial use in all the ten acceding countries together was larger than in Sweden, approximately 20% more, and this difference is mainly due to the acceding hardwood logs, whereas the quantity of both pulpwood and softwood logs is rather similar (data not shown).

3.3.2 Production

The forest industry products under analysis have been divided into three categories: sawnwood, veneer sheets and boards, and pulp, paper and paperboard. Due to the time limitation, only furniture among the secondary processed forest products is mentioned in the report.

3.3.2.1 Sawnwood

The production of total sawnwood in all acceding countries together is approximately the same as in Sweden, about 18% of the production of the enlarged EU-25. Most of EU production, both in EU-15 and EU-25, is sawn softwood, 90%, and only 10% is hardwood. However, the share of sawn hardwood in the acceding countries is 20%, higher than in the present EU-15. Therefore, in the enlarged EU-25, 30% of the sawn hardwood will be from the new EU members, in comparison with only 2% from Sweden (Fig. 21).

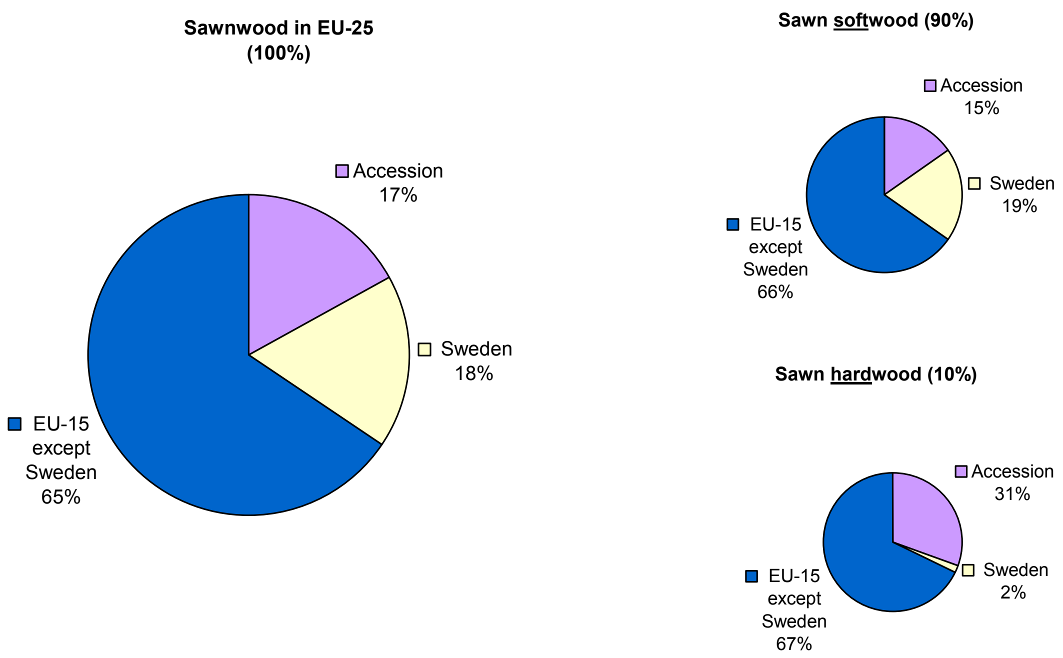

Fig. 21. Share of sawnwood production in the enlarged EU-25: acceding countries, Sweden and present EU-15 except Sweden, in total, softwood and hardwood. Source: UNECE, Timber Committee. Data from 2002.

By countries, Latvia and Czech Republic, followed by Poland, are the biggest sawnwood producers among the acceding countries, although none of these countries reach 25% of Sweden's production. The biggest sawn hardwood producers are Latvia and Poland, whereas the largest shares of sawn hardwood in the total sawnwood are in Slovakia (one-third) and Hungary (two-thirds) (Fig. 22). Sweden only produces more hardwood than 3 of the acceding countries: Slovenia, Cyprus and Malta.

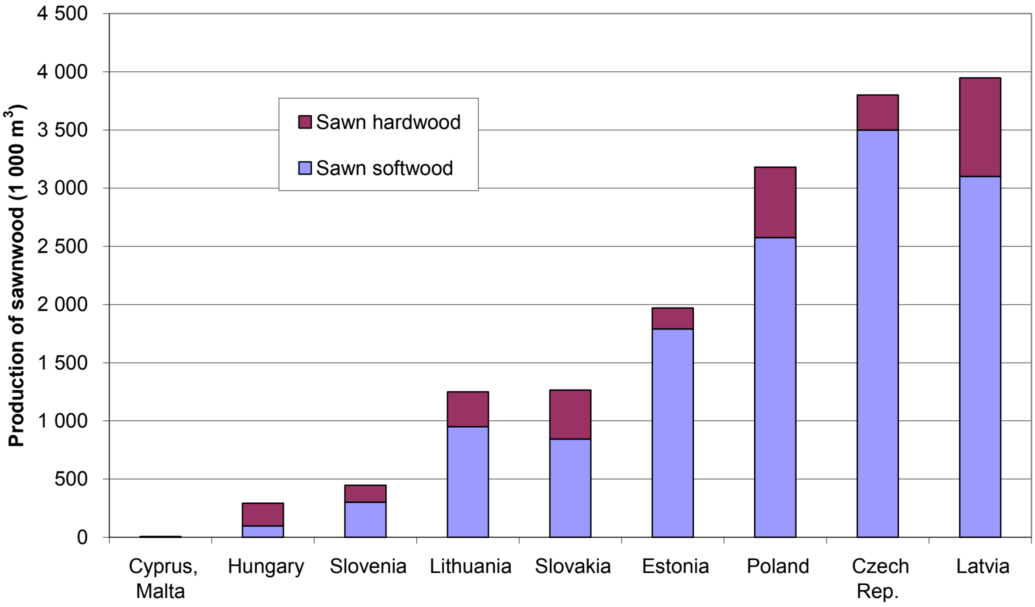

Fig. 22. Production of sawnwood in the acceding countries: total, softwood and hardwood, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002.

3.3.2.2 Veneer sheets and boards

The production of veneer sheets, plywood, particle board and fibreboard is rather low in Sweden and in all acceding countries with the exception of Poland. The Polish production would be 10% of the enlarged EU-25, whereas the production of the other 9 countries together would be 6%, and the Swedish production only 2% (Fig. 23).

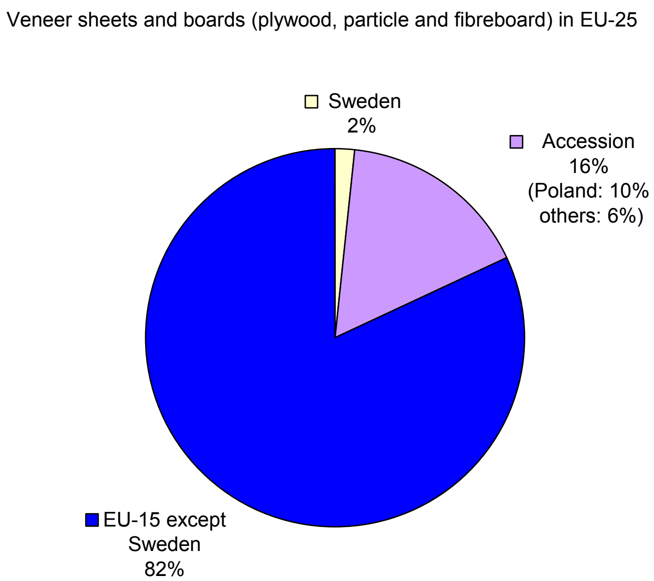

Fig. 23. Share of veneer sheet and board production in the enlarged EU-25: acceding countries, Sweden and present EU-15 except Sweden. Source: UNECE, Timber Committee. Data from 2002.

The production and consumption of this type of product is very concentrated in a few European countries, mainly Germany, Italy and UK. Panel manufacturing needs a high investment threshold.

By countries, Poland has the biggest production among the acceding countries in the four categories under analysis in this epigraph: veneer sheets, plywood, particle board and fibreboard; especially in the last two products, particle board and fibreboard, where the Polish production is, respectively, 55% and 80% of the total production in acceding countries. After Poland, only the Czech Republic has a slightly larger production than Sweden among the acceding countries in the accumulation of the four categories (Fig. 24).

By categories, in addition to Poland, other four countries (Estonia, Hungary, Slovenia and Slovakia) produced in 2002 more veneer sheets than Sweden. In plywood, Poland, Latvia and Czech Republic had larger production than Sweden.

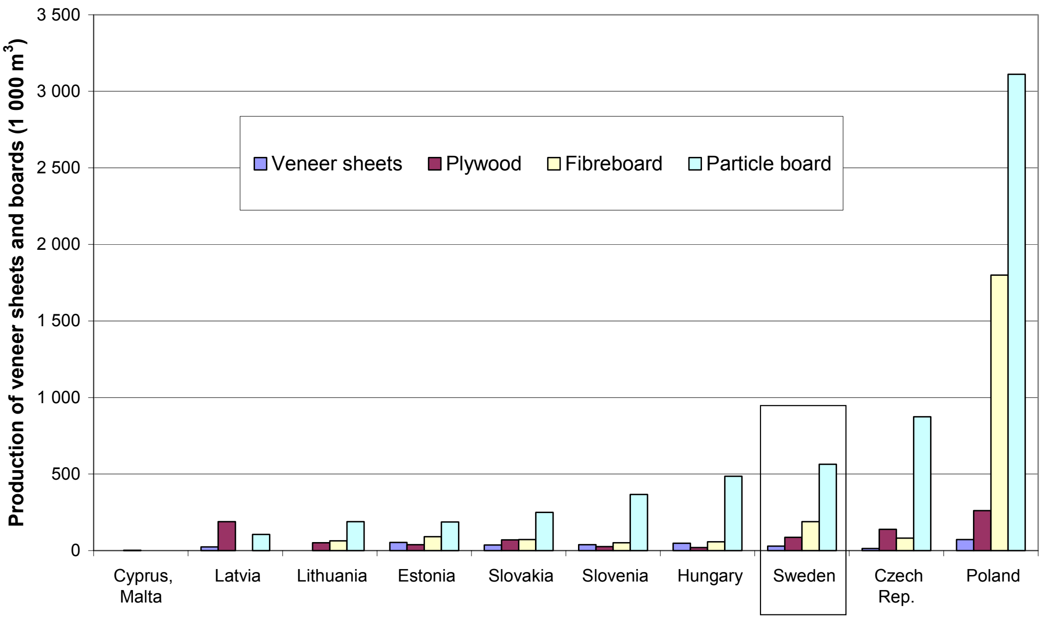

Fig. 24. Production of veneer sheets, plywood, fibreboard and particle board in the acceding countries and Sweden. Source: UNECE, Timber Committee. Data from 2002.

3.3.2.3 Pulp and paper

Although far from Swedish production, pulp, paper and paperboard production is significant in Poland, and to a lesser extent, in the Czech Republic and Slovakia.

In an enlarged European Union of 25 countries and with data from 2002, the share of pulp production of all acceding countries would be 7% of the total EU-25, very far from the 31% share of Swedish pulp production. Regarding paper and paperboard production, the share of the acceding countries drops slightly to 6%, whereas Sweden's share falls to 12% (Fig. 25).

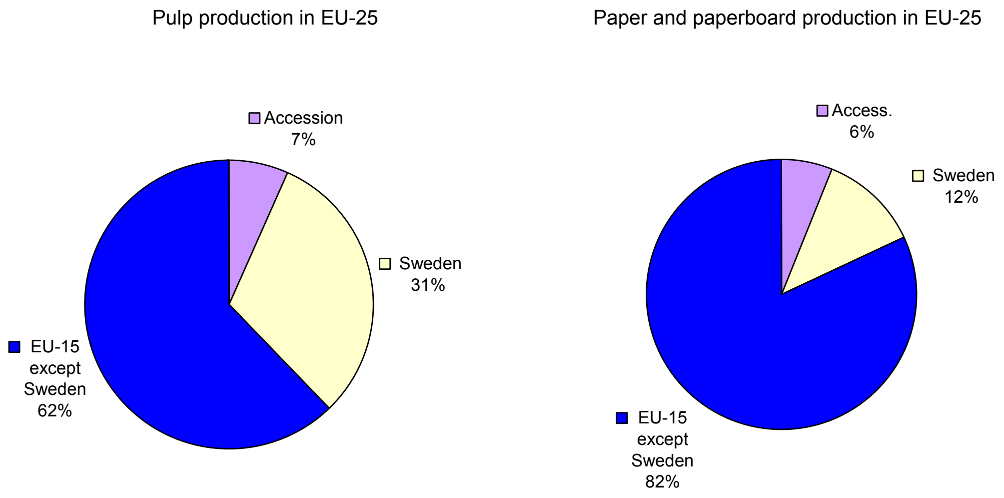

Fig. 25. Share of pulp, and paper and paperboard production in the enlarged EU-25: acceding countries, Sweden and present EU-15 except Sweden. Source: UNECE, Timber Committee. Data from 2002.

By countries, Poland is the biggest producer of both pulp, and paper and paperboard, although far from Swedish production (5 and 10 times smaller than Sweden, respectively), followed by Czech Republic and Slovakia. Also Slovenia and Hungary have some production of pulp (Fig. 26).

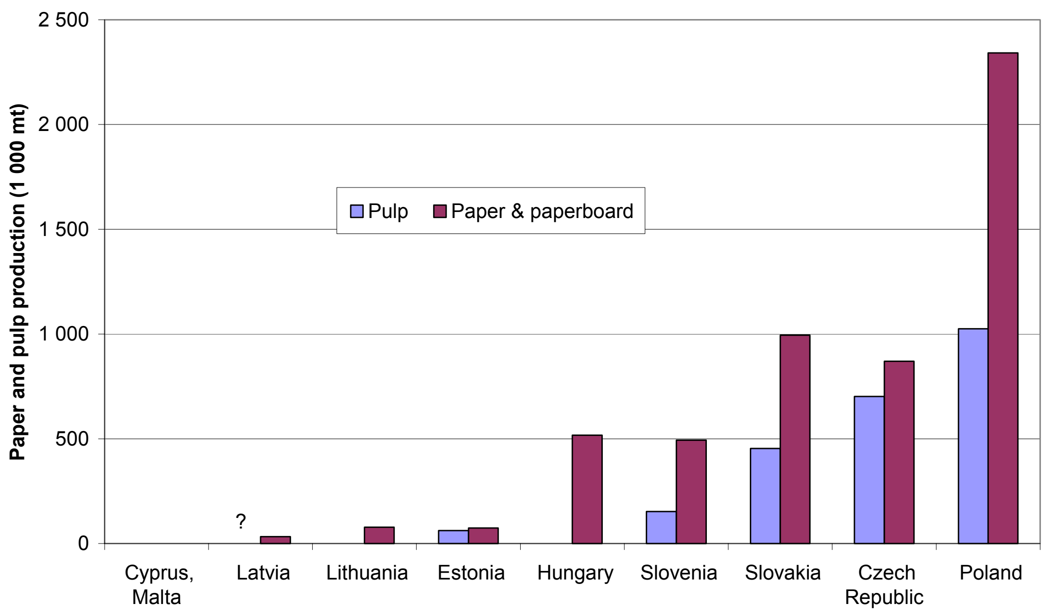

Fig. 26. Production of pulp, and paper and paperboard in the acceding countries. Data on Latvia's pulp production were not available. Source: UNECE, Timber Committee. Data from 2002.

3.3.3 Trade

3.3.3.1 Industrial roundwood

In terms of industrial roundwood trade, the acceding countries are mainly exporters of pulpwood, approximately 30% of their removals. The main exporters are Latvia and Estonia. Smaller exporters of roundwood are the Czech Republic (pulpwood and softwood logs), Lithuania (pulpwood) and Slovakia (pulpwood).

These exports are quite relevant for Sweden, since the Swedish imports of pulpwood are roughly 20% of the industrial consumption. Latvia and Russia, and to lesser extent, Estonia and Lithuania, are nowadays important suppliers of wood for Sweden. Swedish imports from Latvia are increasing every year (as those from Russia decrease and instead come through Latvia) and in 2002 were worth 1 600 million SEK. However, the trend to shift towards more Value Added in the acceding countries will increase in the future the exports of final products, and decrease the exports of roundwood from their forests.

This trend will probably take much more time in the case of the Russian exports, due to their huge forest resources, lower investments and capability, and less-developed infrastructures. A larger import of Russian roundwood - either directly from Russia or transiting through other countries - could replace the foreseen drop in the exports of roundwood from Estonia, Latvia and Lithuania to Sweden. However, the price of the Russian roundwood is likely to raise due to reasons such increasing demand and possible taxes charging the exports of non-processed wood.

The enlargement is likely to increase the trade of the acceding countries with Russia and the other CIS countries. Providing that the amount of wood (standing volume) of the Russian Federation is four times the wood of the whole EU-25, the future of the commercial relations between EU countries and Russia is crucial. At this respect, Latvia and Estonia could become an alternative to Finland and other actual EU members for the Russian exports of roundwood to the EU.

In figures 27 and 28 the exports and imports of roundwood (pulpwood and logs) of the 10 acceding countries are shown. Comparing the figures, the status of most of these future EU members as being exporters is clear.

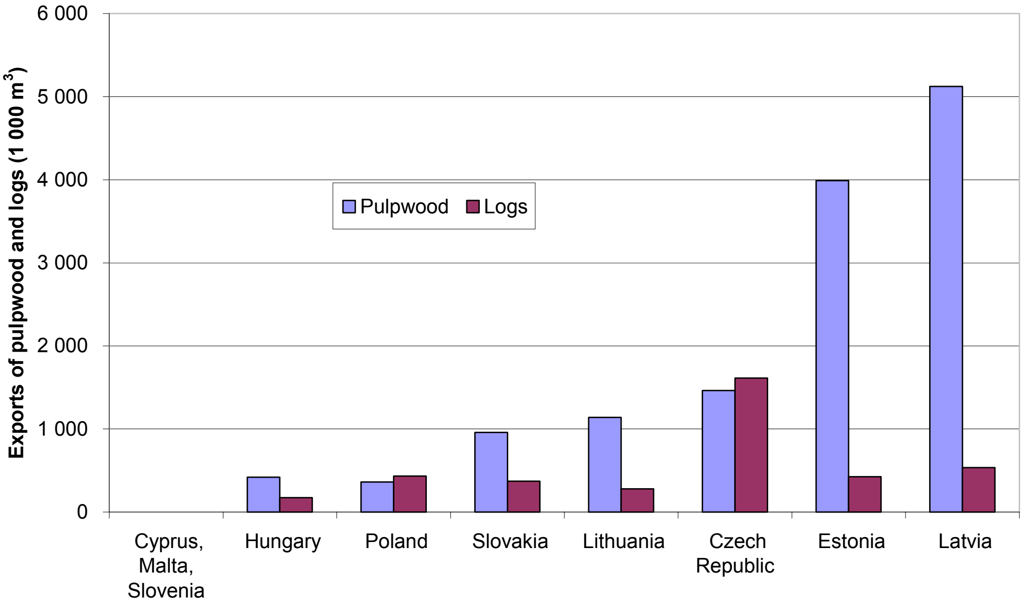

Fig. 27. Exports of pulpwood and logs in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002.

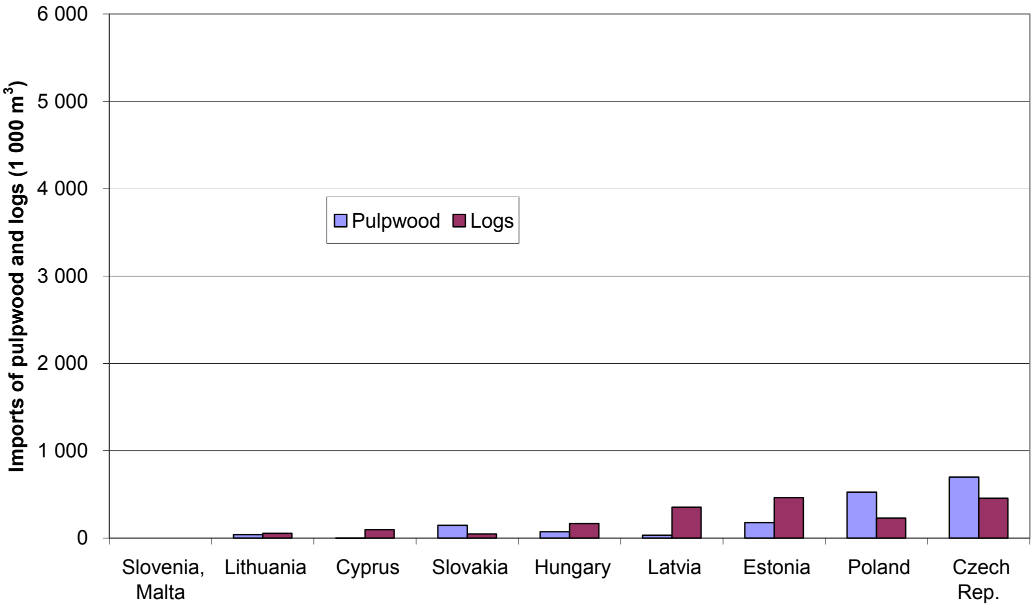

Fig. 28. Imports of pulpwood and logs in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002.

3.3.3.2 Sawnwood

Sawnwood is the most exported forest product from the acceding countries. The main producer and exporter is Latvia, exporting 70% of their production; also Czech Republic, Estonia, Lithuania, Slovakia and Poland are notable exporters. The exports of sawnwood of the acceding countries are also much bigger than the imports for all the countries excepting Hungary and Cyprus, where imports of sawnwood are larger than exports (Fig. 29 and 30). In Hungary, however, there is a net export of sawn hardwood.

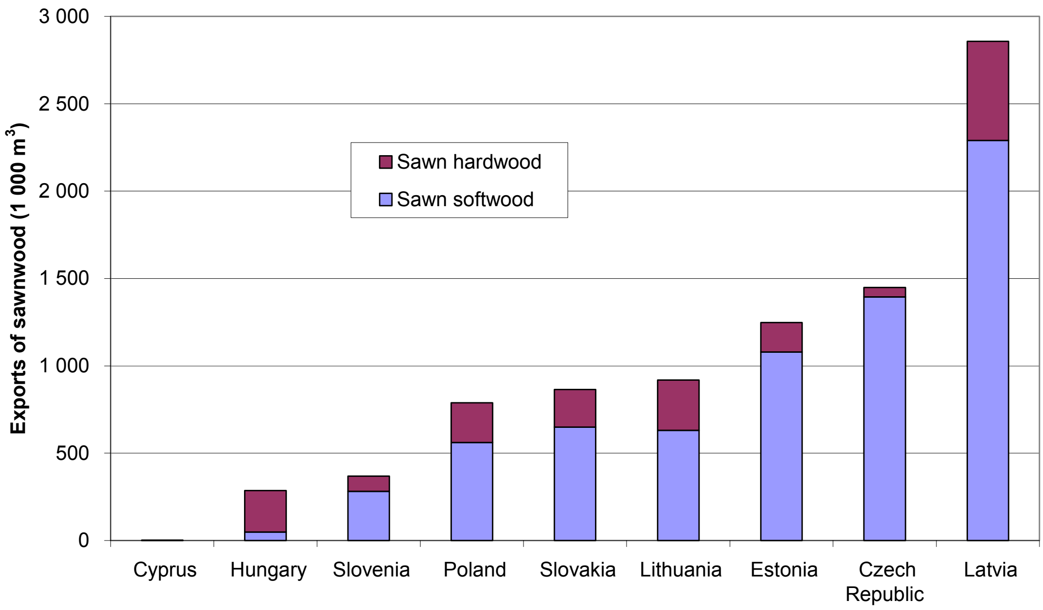

Fig. 29. Exports of sawnwood, hardwood and softwood, in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002. Data from Malta not available.

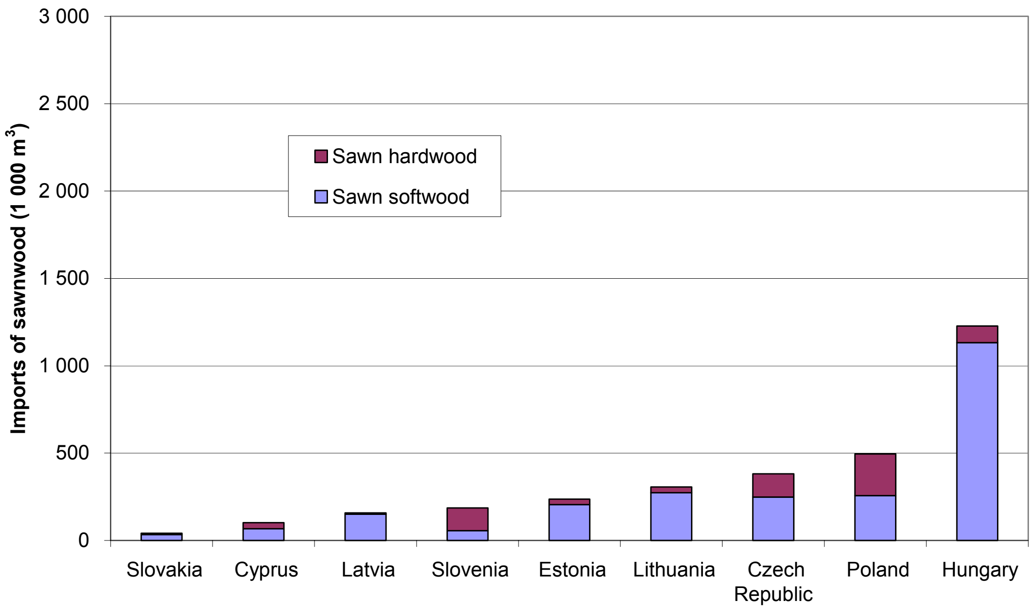

Fig. 30. Imports of sawnwood, hardwood and softwood, in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002. Data from Malta not available.

3.3.3.3 Veneer sheets and boards

Neither the exportation nor the importation of veneer sheets and boards (wood based panels) is important in the acceding countries, with some exceptions in certain products in Poland, the Czech Republic and Hungary. These exceptions are fibreboard and particle board in Poland and Czech Republic, and only particle board in Hungary. Poland is the largest exporter of fibreboard and particle board among the acceding countries, and also the largest importer (Figs. 31 and 32). The accession of the new member countries might increase the market of exports for current EU producers as well as for Poland

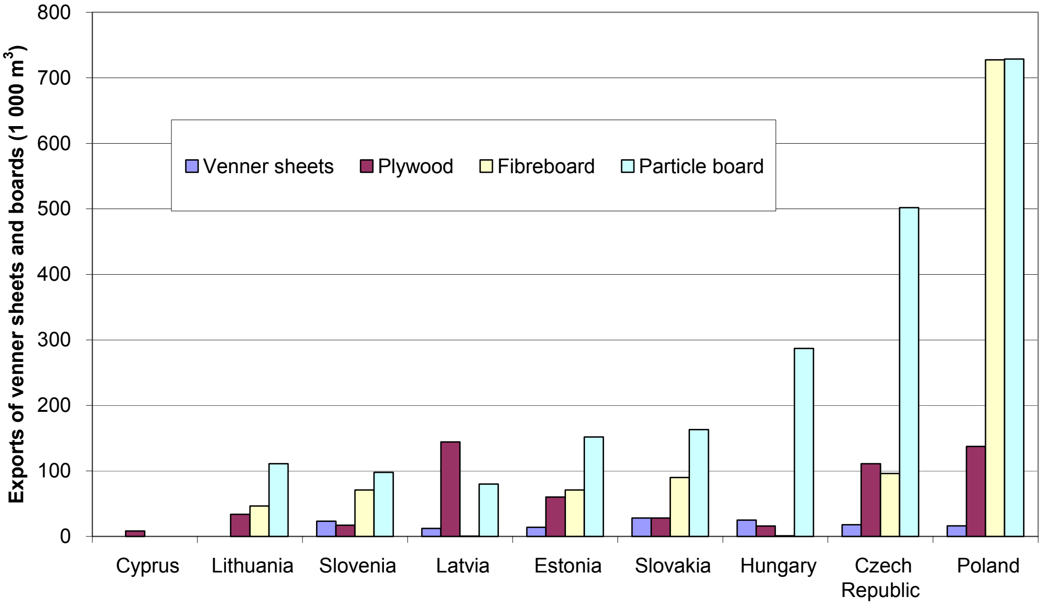

Fig. 31. Exports of veneer sheets and boards in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002. Data from Malta not available.

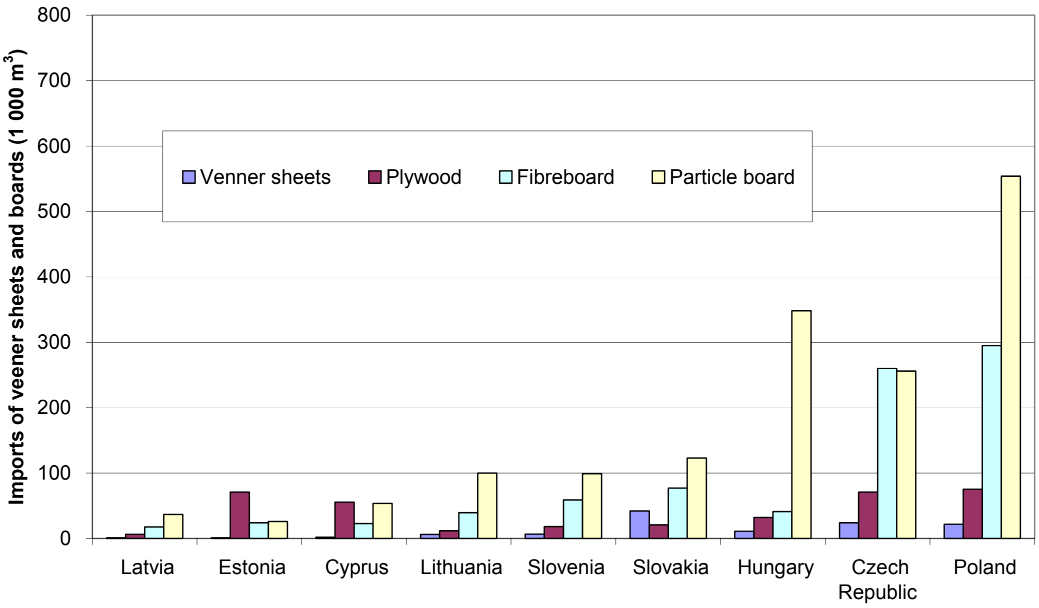

Fig. 32. Imports of veneer sheets and boards in the acceding countries, in thousand cubic meters. Source: UNECE, Timber Committee. Data from 2002. Data from Malta not available.

3.3.3.4 Pulp and paper

Regarding the trade of paper and paperboard, Poland is by far the largest importer and exporter, with a global negative balance. Other importing countries of paper are the Czech Republic and Hungary. In addition, Latvia, Estonia, Lithuania and Cyprus are importer countries of paper and paperboard.

In pulp, the largest exporter is the Czech Republic, and net importers are Poland, Hungary and Slovenia (Figs. 33 and 34).

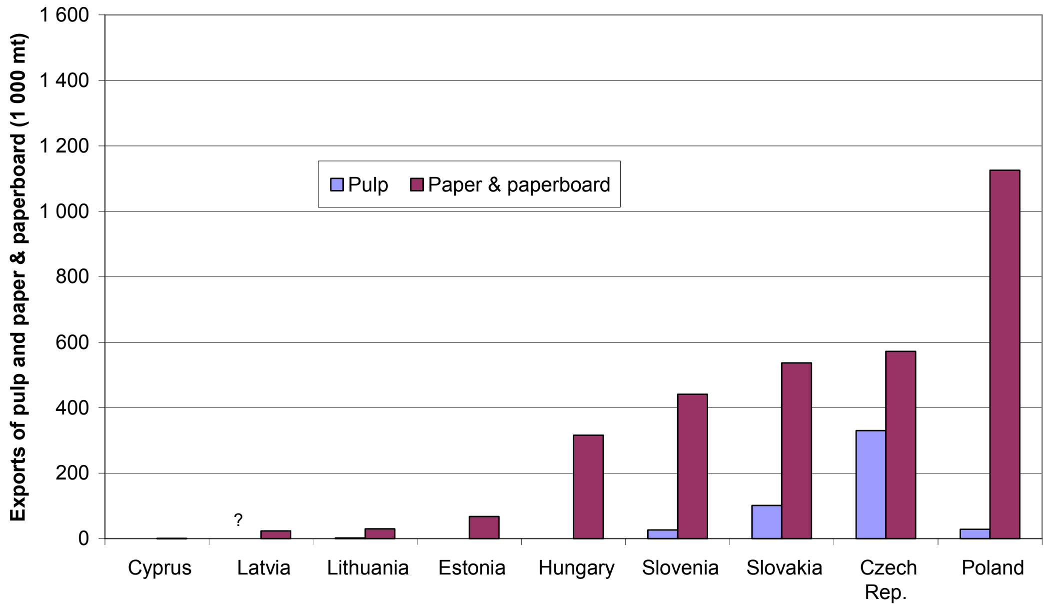

Fig. 33. Exports of pulp and paper & paperboard in the acceding countries, in thousand tons. Source: UNECE, Timber Committee. Data from 2002. Data of Malta and from pulp of Latvia not available.

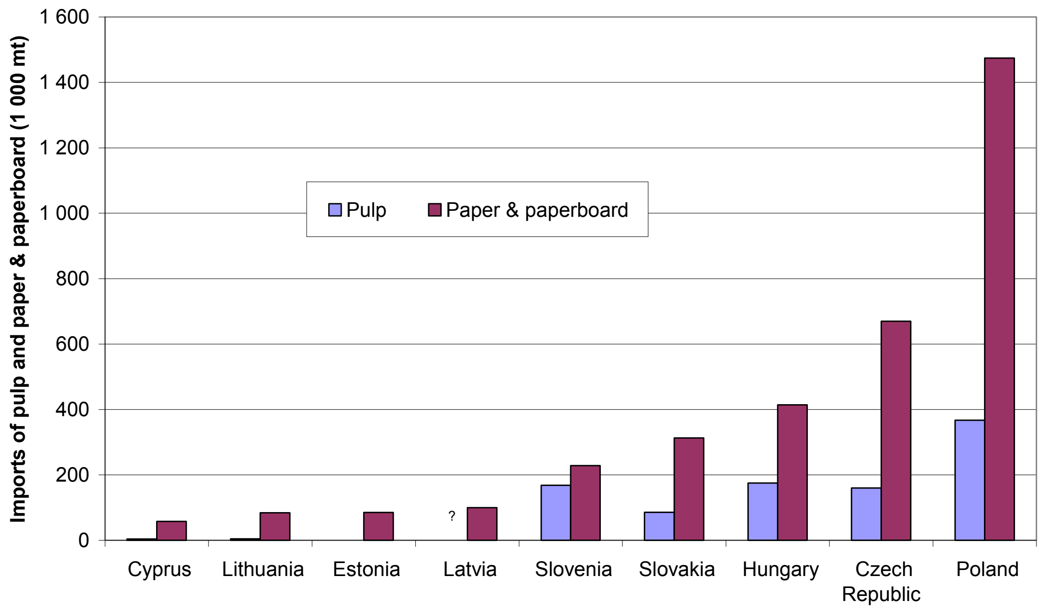

Fig. 34. Imports of pulp and paper & paperboard in the acceding countries, in thousand tons. Source: UNECE, Timber Committee. Data from 2002. Data of Malta and from pulp of Latvia not available.

In the pulp and paper sector, the enlargement will mean access to an important market for the current EU countries, where the consumption of pulp and paper is increasing rather rapidly. The very high capital investments needed for building new pulp and paper mills might retard the development of local-funded industries in the short term, but in many cases the capital will be FDI (e.g. projects of pulp and paper mills in Latvia and Estonia, with Swedish, Finnish and Norwegian investors). Most opportunities in this short term will be then for transferring technology, not only setting up new industries but also enhancing energy efficiency and environmental issues in the existing ones. In the medium term, the competitiveness in the pulp and paper sector will increase significantly.

3.3.3.5 Furniture

Furniture manufacturing is well developed in some of the acceding countries. In Poland, furniture production quadrupled between 1990 and 1999 and furniture exports increased tenfold in the same period, four-fifths of the biggest firms being controlled by German investors. In addition, in 1999 the Czech Republic, Hungary and Slovakia were among the world top 15 furniture exporters (ILO, 2001). The furniture industry in the acceding countries is forecasted to keep growing, most likely at the expense of domestic production in the EU.

3.4 Final considerations

Trade perspectives

Even though trade barriers were removed during recent years, an increasing trade between current EU and acceding countries is expected. The trade with countries such as Germany and Austria, because of their geographical proximity and in some cases common border, is expected to grow more importantly than with other EU members. Finland, Sweden and Denmark will also experience a higher increase of trade in the Baltic area.

On a worldwide scope, globalization is raising the trade of forest products much more than the production, in part due to the falling tariffs. However, the trade is increasingly a “captive trade” (similar to exclusive rights for exporting the products from a mill), within firms that are linked through Foreign Direct Investment (FDI) or through subcontracting arrangements, including those by original equipment manufacturers (OEMs) (ILO, 2001). Even though trade statistics often do not reflect this captive trade, it seems clear that German investors are moving mainly towards Poland, as Nordic ones do to Estonia, Latvia and Lithuania.

Emerging markets

Growth in consumption of forest products is forecasted to be much faster in the acceding countries than in the traditional producer countries of the EU. However, due to the potential of their forest industry and to their proximity to Russia - and its large stock of relatively cheap wood - they might become net exporters of forest industry products rather than importers in the medium and long term

Countries where markets are especially interesting are Poland, the Czech Republic and Hungary, due to their larger population. In the case of Hungary, and with the exception of the furniture industry, their dependency on importation of most of their forest products is most likely to continue in the future.

Either through FDI or through subcontracting arrangements (including OEMs), there are big short and medium term opportunities for business in the transfer of technology to the acceding countries, setting up the new industries.

Competitiveness

Forest-based industries are ranked among the top three industry sectors in Estonia, Latvia, Lithuania, Poland and Slovenia. Forest industries are also relevant on the acceding countries level in the Czech Republic and Slovakia.

From a business point-of-view, strong points of the acceding countries are low labour costs, availability of EU funding (ISPA and Sapard) and high level of technical qualifications, whereas weak points are outdated production technologies, low energy efficiency and poor environmental performance.

Subcontracting of labour-intensive operations and relocations to low-wage countries (such as some acceding countries) seem to be an unstoppable trend. For large firms, market access is the main motive of relocation, whereas medium-size enterprises invest in acceding countries primarily because of lower wage costs.

Competitiveness has already increased and will continue growing in the short term in those industries where lower capital investments are needed: Sawnwood, furniture and printing industries. In the medium and long term, local and foreign investment may develop and increase the competitiveness in other forest industry sectors: Wood-based panels, pulp, and paper and paperboard.

The competitiveness in the European and global market of forest products will be higher, due mainly to the importer potential of Latvia, Estonia, Lithuania, Poland and Czech Republic in forest products. With two-thirds of the Swedish exports going to the EU, the increase of the exports of forest products from the acceding countries to the EU - also their main market - will raise significantly the competitiveness within the Single Market.

Alternatives for Swedish forest industry are various: To increase the quality and specificity of the products, to increase their exports to other countries different than EU, to gain market through certification and merchandising, or to take strategic positions in the acceding countries as well as in Russia through FDI or joint ventures with local companies. By means of the last alternative, apart from entering in emerging markets, the so-called captive trade could be established, on one hand avoiding direct competition for the same markets and on the other hand allowing the possibility of a further industrial processing in Swedish mills (e.g. building pulp mills in Eastern Europe and exporting the pulp to Sweden for producing paper).

On a global scale, a larger domestic market will increase the EU independence from others.

For the whole industry of the acceding countries, the high energy dependency on fossil fuels or nuclear power plants seems to be an important problem in order to face the future and to fulfil the Kyoto Protocol commitments. Energy supply might be a limiting factor for the development of forest-based industries. On the other hand, as it happens in the present EU countries, the use of wood and other biomass in energy production is likely to increase.

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2001:4	Resultat från Skogsstyrelsens ekenkät 2000
2001:5	Effekter av kalkning i utströmningsområden *med kalkkross 0 - 3 mm*
2001:6	Biobränslen i Söderhamn
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2001:8A	Skogspolitisk historia
2001:8B	Skogspolitiken idag - en beskrivning av den politik och övriga faktorer som påverkar skogen och skogsbruket
2001:8C	Gröna planer
2001:8D	Föryngring av skog
2001:8E	Fornlämningar och kulturmiljöer i skogsmark
2001:8F	Ännu ej klar
2001:8G	Framtidens skog
2001:8H	De skogliga aktörerna och skogspolitiken
2001:8I	Skogsbilvägar
2001:8J	Skogen sociala värden
2001:8K	Arbetsmarknadspolitiska åtgärder i skogen
2001:8L	Skogsvårdsorganisationens uppdragsverksamhet
2001:8M	Skogsbruk och rennäring
2001:8N	Ännu ej klar
2001:8O	Skador på skog
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2001:11D	Urvalskriterier för bedömning av markförsurning
2001:11E	Effekter på kvävedynamiken av markförsurning och motåtgärder
2001:11F	Effekter på skogsproduktion av markförsurning och motåtgärder
2001:11G	Effekter på tungmetallers och cesiums rörlighet av markförsurning och motåtgärder
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2001:11I	Ännu ej klar
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2003:8 Ej klar
2003:9 Ej klar
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1993:2	Virkesbalanser 1992
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1994:1	Plantinventering 89
1995:1	Skogsvårdsorganisationens årskonferens 1994
1995:2	Gallringsundersökning 92
1995:3	Kontrolltaxering av nyckelbiotoper
1996:1	Skogsstyrelsens anslag för tillämpad skogsproduktionsforskning
1997:1	Naturskydd och naturhänsyn i skogen
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1998:4	Miljöhänsyn vid föryngringsavverkning - Delresultat från Polytax
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1998:8	Gallringsundersökning 1997
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On the 1st of May 2004, the biggest enlargement in the history of the European Union will take place with the accession of ten new members: Cyprus, Czech Republic, Estonia, Hungary, Latvia, Lithuania, Malta, Poland, Slovakia and Slovenia.

From a forestry point of view, these ten countries have important resources. Their forest industry is expected to develop and expand in the coming years, increasing the competitiveness in the EU market.

For current EU members, the enlargement also represents the access to a very attractive market, where the growth in the consumption of forest products is forecasted to be among the highest in the world.

This report analyses these and other aspects of the enlargement related to the forestry sector.

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