



Roadmap 2010 for the European Woodworking Industries



Background

- 1999, CEI-Bois and EU Commission study on the EU woodworking industry
 - Evaluation of the competitiveness of the EU woodworking industry vis-à-vis competitors
 - Conclusions and recommendations as to future prospects
- 1999-today: Ongoing consolidation process
 - Need for an increased European approach towards in promotion, R & D, lobbying and competence
 - CEI-Bois Chairman Bo Borgström launches idea for a "Roadmap 2010" study for the European woodworking industries



Vision 2010

Wood and wood products
to become the leading
material in construction
and interior solutions by
2010



Aim of Roadmap 2010

- To produce an updated analysis on key factors and challenges affecting the woodworking industries
- To identify the opportunities
- To describe the ideal position
- To produce an action program for the European woodworking industries towards 2010



Progress

- Presentation to CEI-Bois Board, General Assembly and Round table of industrialists
- Tender to main consultancy firms
- Agreement on basic financing
 - Nordic Timber Council, Austrian Woodworking association, European Panel Federation
- Results to be used by CEI-Bois and CEI-Bois members



The study

- Main work packages
 - General co-ordination
 - Environmental analyses and wood and fibre availability
 - Developments of the European markets
 - Developments of the non-European markets, incl. Russia
 - Barriers to the enhanced use of wood in Europe
 - “Perception” analyses
 - Overall conclusions and development of an action programme
 - Verification and dissemination



WP 0 General co-ordination of the study and the consultancy work. Quality supervision

- Steering group
 - Decides on basic concepts of the study
 - Policy decisions
- Composition
 - Bo Borgström, Moelven/Finnforest, Chairman
 - Mikael Eliasson, Assidomän,
 - Kim Holmström, EU Commission
 - Jan Söderlind, NTC
 - Dr Guy Van Steertegem, CEI-Bois
 - Dr Erich Wiesner, Austrian association/Wiehag



WP 0 General co-ordination of the study and the consultancy work. Quality supervision

- Project group
 - Day-to-day follow-up of progress
 - Evaluation of all documents prepared by the consultants - Suggestions
 - Control of deliverables (timing, content, results, reporting)
- Composition
 - Filip De Jaeger, CEI-Bois, Chairman,
 - Aila Janatuinen, FFIF
 - Eva Janssens, EPF
 - Dieter Lechner, Austrian association
 - Matti Sihvonen, Finnforest/NTC
 - Jeremy Wall, EU Commission
 - Mikael Westin, SFIF



WP 1 Environmental analyses and wood and fibre availability

- WP1.1 Environmental catalogue for wood-based products
 - CO₂ sequestration potential (forest, wood based and paper products,...)
 - Recycling possibilities (recycled wood, recycled paper,...)
 - Energy consumption, energy savings
 - LCA's
 - Case studies for typical applications
 - Sustainability: forest and forest product certification;
 - Health & safety issues



WP 1 Environmental analyses and wood and fibre availability

- WP 1.2 Study of the global fibre supply
 - Demand/supply analyses in the EU (Western and Eastern Europe)
 - Prospects 2005/2010/2020
 - Subdivision in : logs (hardwood/softwood), small sized timber, industrial residues, “recovered” wood;
 - Impact of increasing wood consumption for bio-energy applications;
 - Impact of subsidies/ investment incentives
 - Import/export opportunities
 - Effect of logistics (practical availability of the raw material, work forces, transport regulations, introduction of new “road” taxes,...).



WP 2 Developments of the European markets (Western and Eastern Europe, excluding Russia)

- WP 2.1 Analyses of the markets
 - Factual description (history and forecasts)
 - For primary products (sawn softwood, sawn hardwood, plywood, OSB, particleboard, MDF, glulam, LVL, I joists);
 - For secondary products (joinery, wood furniture, flooring, fencing + gardening, packaging, transportation, building components);
 - Trade flows
 - Main economic drivers (demographic evolution, GDP, ...)



WP 2 Developments of the European markets (Western and Eastern Europe, excluding Russia)

- WP 2.2 Economic analyses of the European construction market (Western and Eastern Europe, including Russia)
 - Factual situation 1990, 1995, 2000 and 2002. Forecasts 2003, 2004, 2005, 2006, 2010
 - For residential applications (new construction, renovation and maintenance markets)
 - For non-residential applications (new construction and renovation and maintenance markets)
 - Market shares of wood based products



WP 2 Developments of the European markets (Western and Eastern Europe, excluding Russia)

- WP 2.3 Structural changes of the market
 - Industry structure (largest players in each of the sub-sectors,...)
 - Comparison to other competing industrial sectors, situation with the supplying industry;
 - Company integration
 - Cost competitiveness (wood, energy, labour, capital, chemicals, transport,;...)
 - Product substitution (within the wood chain and outside)
 - Effects of changes in distribution/retail channels
 - Investments
 - State of technology



WP 3 Developments of the non-European markets, including Russia

- WP 3.1 Economic development of the woodworking industries in North America, China, Japan, Russia
 - Basic description (history and forecast)
 - For primary products
 - For secondary products
 - Trade flows (export opportunities, exchange rates,...)
 - Main economic drivers (demographic evolution, GDP, ...)
 - Industry structure (major players)



WP 3 Developments of the non-European markets, including Russia

- WP 3.2 Fibre and wood supply situation in non-European markets
 - Analyses of the major developments in Russia, North America, Argentina, Brazil, Chile, Australia, New Zealand, South East Asia (Indonesia, Malaysia, China,...), South-Africa



WP 4 Barriers to enhanced use of wood in Europe

- Analyses of main constraints (regulatory matters, building codes, recycling regulations, packaging regulations, energy regulations, environmental regulations, health & safety regulations, traditions, sanitary + phytosanitary matters)
- Competition with other material
- Taxes and subsidies (e.g. effect of lower VAT rates)
- Innovation
- Functionality, standardisation, Ce-marking
- Competition aspects

Link to European Working Group on “Enhanced use of wood”, EUW



WP 5 “Perception” analyses

- WP 5.1 Views on the (future) development of the woodworking industry
 - Inventory of “wood promotion campaigns”
 - Studies on public perception (youngsters, consumers,...) at selected key national markets and at European level
 - Interviews with governmental and non-governmental bodies, education and research institutes, specifiers, consumers



WP 5 “Perception” analyses

- WP 5.2 Verification with key players
 - Advices of “Captains of industry” (field interviews)



WP 6 Overall conclusions and development of an action programme

- Best strategic opportunities for the future
- Development of action programmes for industry, federations and authorities
- Proposals for campaigns on building with wood, living with wood, packaging and transportation



WP 6 Overall conclusions and development of an action programme

- Actions on promotion, lobbying (environment, product standards, building codes, health standards recycling, reuse, bio-energy, taxes and subsidies,...), R&D (innovation in products and processes, standardisation, sustainability, “pan-European building systems), competence (education and vocational training, skill development, technological breakthroughs, knowledge transfer,...)



WP 7 Verification and dissemination

- Development of website, discussion forum with federations and enterprises (particularly Sme's).
- Validation of the action programmes.
- Presentation towards Cei-bois and sponsoring bodies (NTC, Austrian association, Epf, ...)
- Preparation of summaries of the different studies
- Publication of these summaries, for the attention of the executives



Conclusions and Action programme

- Action programme:
 - Recommendation of actions, in principal divided by:

Action area \ Receiver	Industry	CEI-Bois	Authorities
Promotion	X	X	X
Research and Development	X	X	X
Lobbying	X	X	X
Competence	X	X	X



Deadline

- First presentation at European Wood Day on 19.11.2003
- Final document towards end 2003
- Implementation of action plan shortly after



Main project consultants

Timwood AB

JAAKKO PÖYRY

Jaakko Pöyry Consulting





For further info:

info@cei-bois.org

filip.de.jaeger@cei-bois.org

TP +32 2 556 25 85

TF +32 2 556 25 95