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Netherlands

Solid Wood Products

Annual

2003

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Report Highlights:

This report is an overview of the Dutch Market for forest products

Includes PSD Changes: No
Includes Trade Matrix: No
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Executive Summary

The Netherlands has about 341,000 hectares of forest. Approximately 55 % is softwood whereas the remaining is hardwood. Over 35 % of Dutch harvest is scotch pine. Other important types are douglas fir, poplar/willow, Norway spruce and Japanese larch. The majority of the Dutch harvest is softwood, the type preferred best by the processing industry because it is easy to use for different purposes. The majority (57 percent) of the harvest is used as lumber and veneer. Another 17 and 16 percent are used as respectively plywood and firewood.

The Dutch wood processing industry exists of one newspaper factory, one fold cardboard factory and approximately 90 sawing mills. In addition to export to predominantly Belgium and Germany, the Dutch industry also imports roundwood. Approximately one third of the harvested wood ends up in a sawing mill, a quarter is used in the paper and chipboard industry and the remaining 40 percent is used for the production of wooden shoes and piles.

The total value of Dutch forest product imports in 2001 was US \$729 million, 10 percent lower than the preceding year. Based on the figures for the first 6 months, forest product imports in 2002 will again be lower.

Overall, the Netherlands imports 95 percent of its forest product needs. The domestic wood production is 865,000 M3. In addition, the Netherlands imports almost 20 million M3. Of total supply 6 million M3 is exported while 15 million M3 stays on the Dutch market.

Major suppliers of wood on the Dutch market are Sweden, Finland and Russia. The biggest trade flow is Softwood Lumber from the three above-mentioned countries to the Netherlands. Germany, Latvia and Belgium are albeit to a lesser extend important suppliers of Softwood Lumber. Another trade flow of significance is Finland's export of Softwood Plywood to the Netherlands. The only commodity where the US have a noticeable market share is in Temperate Hardwood Lumber, the US accounts for over 20 percent of Dutch import.

The total value of the Dutch forest product exports in 2001 was US \$ 470 million. The domestic market is by far the most important user market. The Netherlands re-exports some Softwood Lumber to Belgium. In addition, the Netherlands sells semi-manufactured products or final products to neighboring countries.

Production

Forest Situation and Outlook

The Netherlands has about 341,000 hectares of forest. The biggest forests are in the southern and eastern parts of the country with a concentration in the Veluwe. The area of remunerative forest is 316,000 hectares (93 percent of total forest). Approximately 173,000 hectares are softwood whereas the remaining is hardwood.

The area of remunerative forest in the Netherlands is equivalent to 10 percent of its total land area (3.4 million hectares). The percentage of wooded land is not very high compared to countries such as Germany (29%), France (25%) and Belgium (20%). To protect the Dutch forest and to expand it the government has developed a policy, which was laid down in the Forestry Policy Plan. Intentions are to increase the total area under trees by 75,000 in within the next 25 years. That is by 3,000 hectares a year. The increase will be realized by the government and by provinces, local authorities, trade and industry, farmers and private persons.

This has been an ambitious plan since so far, actual planting is far below the goal. Between 1995 and 1999, only 1,200 hectares of forest land were planted annually.

During the 20th century, the area of forest increased annually. Not only due to the planting of new trees but also by protecting the existing forests. The protection of Dutch forests has been established in 1917 in the first law for forests: the "Nood Boschwet". This law was transferred into the "Boswet" in 1962, a law which is currently still applicable.

The Boswet says that it is not allowed to decrease the area of total forest. If trees are cut, the area has to be replanted within 3 years. In some exceptional cases (e.g. improving infrastructure) the replanting can take place in other areas. The Dutch government has increasingly spent more time and money on forestry. The forest policy has gained importance at the agenda of the Ministry of agriculture.

Major plans for forests are the following:

- (1) protect of Dutch forests
- (2) increase the functions of forests
- (3) planting more trees
- (4) stimulate natural forests and wooded areas

(www.minlnv.nl).

The composition of the Dutch forest is slowly changing. The hardwood types are gaining share while the poplar acreage is declining. Except for the douglas fir, softwood types are losing share as well.

Composition of the Dutch Remunerative Forest (1999)			
Hectares Softwood	173,000	Hectares Hardwood	143,000
Scotch pine	103,000	Oak	52,000
Japanese larch	16,000	poplar / willow	25,000
Douglas fir	19,000	Beech	13,000
Norway spruce	13,000	Other	53,000
Other	22,000		

Source: Stichting Bos en Hout

Solid Wood Products Situation/Outlook

The wood processing industry, traditionally specialized in processing softwood, benefits from a sustainable supply of wood. However statistics show that the sustainable supply of important types is not guaranteed in the Netherlands. In the long run planting and harvesting are not in balance. This is already noticeable in the Scotch pine production where the harvested volume is already 6 percent higher than the annual growth.

Due to the Dutch Forestry Policy Plan, the gross annual growth of total Dutch wood is about 2.4 million M3 (7.6 M3/ha). Almost two third of this growth (1.5 million M3) is harvested so the net growth is almost 0.9 million M3. As a result, the standing stock per hectare has increased from 167 to 183M3 between 1995 and 1999. Total standing stock in 1999 was 57,384,000 M3.

Harvest 1999 by Type of Wood (1,000 M3)			
Softwood	1.080	Hardwood	467
Scotch Pine	508	Poplar/Willow	152
Douglas Fir	178	Oak	109
Norway Spruce	139	Beech	25
Japanese Larch	136		
Other	118	Other	182

Source: SBH

In the Netherlands, 36 percent of the harvest is scotch pine. Other important types are douglas fir, poplar/willow, Norway spruce and Japanese larch. The majority of the Dutch harvest is softwood, the type preferred best by the processing industry because it is easy to use for different purposes. The majority (57 percent) of the harvest is used as lumber (zaaghout) and veneer (fineerhout). Another 17 and 16 percent are used as respectively plywood (vezelhout) and firewood.

The Dutch wood processing industry exists of one news paper factory, one fold cardboard factory and approximately 90 sawing mills. In addition to export to predominantly Belgium and Germany, the Dutch industry also imports roundwood. Approximately one third of the harvested wood ends up in a sawing mill, a quarter is used in the paper and chipboard industry and the remaining 40 percent is used for the production of wooden shoes and piles (heipaal).

Round Wood in the Netherlands in 1,000 M3			
	Total	Softwood	Hardwood
Production	729	544	185
Import	351	161	190
Export	296	208	83
Domestic Use	784	497	292

Source: SBH

The Dutch mills together saw annually 400.000 M3 softwood which generates about 200.000 M3 wood products. The industry is quite diverse. Traditionally the majority of the Dutch mills have specialized in a type of wood. Furthermore the size of the Dutch mills is quite different. In addition, over 20 mills have not specialized themselves and saw different types of wood.

Structure Of The Dutch Milling Industry						
>70% of wood is	<1,000 m3	1,000 - 4,999 m3	5,000 - 9,999 m3	10,000 - 24,999 m3	>25,000 m3	Total
Poplar				2		
# Mills	1	6	3	34,108	2	14
Total Use	650	20,170	19,227	17,054	72,300	146,455
Use/Mill	650	3,362	6,409		36,150	10,461
Soft Wood						
# Mills	9	5	3	3	2	22
Total Use	4,317	13,073	20,100	41,900	302,632	382,022
Use/Mill	480	2,615	6,700	13,967	151,316	17,365
Hard Wood						
# Mills	8	17	3	3	0	31
Total Use	2,832	35,154	17,550	34,600	0	90,136
Use/Mill	354	2,068	5,850	11,533	0	2,908
Mixed						
# Mills	16	4	2	1	0	23
Total Use	4,136	10,485	15,000	23,000	0	52,621
Use/Mill	258	2,621	7,500	23,000	0	2,288
Total						
# Mills	34	32	11	9	4	90
Total Use	11,935	78,882	71,877	133,608	374,932	671,234
Use/Mill	351	2,465	6,543	14,845	93,733	7,458

Source: www.avih.nl

The majority of wood used in the processing industry is imported. This applies also to the construction, parquet and furniture industry. The use of Dutch wood for processing is limited because of the quantity offered but also due to differences in wood types and the quality of Dutch wood. There is only few oak or beech wood which has veneer quality. The volume of deal or pinewood suitable for window frames is also limited. Only the better parts of the Dutch oak, larch and douglas are suitable for wooden floors. Larch and douglas wood however are quite suitable for laminated wood constructions. Finally, Dutch deal and pinewood is an important input for the packing and pallet industry.

In general, wood products where Dutch wood is used are not recognizable as Dutch wood products. For the processor and the end user, the quality and possibilities are far more important than the origin.

Ownership of the Dutch Remunerative Forest (1997)			
Private Persons	State	Provincial/Local	Nature Conserv. Org.
31 %	37 %	14 %	18 %

Source: Stichting Bos en Hout

The ownership of Dutch forests is equally shared among government and private.

Certifying

According to research from the World Nature Fund (WNF) published in November 2001, most Dutch timber traders do not care if wood is certified or not. Although 75 percent of the Dutch consumers say they support durable forestry, about 80 percent of the timber traders do not know the origin of their wood. Most traders want the freedom to buy their wood wherever it is available. This means that no trader can guarantee that he exclusively trades in wood which is legally harvested. According to WNF, Forest Stewardship Council (FSC) wood is still the only reliable quality mark for certified wood.

Different systems of certifying wood in the world:

Pan European Forest Council	37 %
Forest Stewardship Council	25 %
Sustainable Forest Initiative	22 %
America Tree Farm System	9 %
Canada's National Sustainable Forest Management System Standard	7 %

Source: SBH

The following hectares of wood are certified globally, in Europe and the Netherlands.

Certified Wood, 2002	
	Certified wood (*1,000 hectares)
World	119,482
Europe	62,645
The Netherlands	103

Source: SBH

In the Netherlands about a third Dutch forest is certified. 'Staatsbosbeheer' has the biggest share of certified wood.

Certified Wood in the Netherlands, 2002	
	# hectares
Staatsbosbeheer / Government	87,605
Local Government	1,003
Private	5,017
Rest	9,900
Total	103,525

Source: Goedhout

for more information on the Forest Stewardship Council see www.fscoax.org

Trade

The total value of Dutch forest product imports in 2001 was US \$729 million, 10 percent lower than the preceding year. Based on the figures for the first 6 months, forest product imports in 2002 will again be lower.

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The Netherlands:	Value of Total Imports of Forest Products*					
	Description	Jan - Dec	Jan - Dec		Jan-Jun	Jan-Jun
		2000	2001		2001	2002
		--- 1,000 Euros ---			--- 1,000 Euros ---	
Softwood Logs		7,018	15,190		8,638	8,608
Temperate Hard. Logs		8,965	7,951		4,725	3,790
Softwood Lumber		511,675	428,586		211,329	181,701
Temperate Hard. Lumber		109,368	94,933		55,302	38,259
Temperate Hard.Veneer		9,299	7,529		3,800	2,850
Softwood Plywood		93,246	90,387		52,702	30,430
Other plywood		170,215	171,783		79,882	76,325
Total		909,786	816,359		416,378	341,963
The Netherlands:	Value of Imports of U.S. Forest Products*					
Description	Jan - Dec	Jan - Dec		Jan-Jun	Jan-Jun	
	2000	2001		2001	2002	
	--- 1,000 Euros ---			--- 1,000 Euros ---		
Softwood Lumber	6,158	5,248		3,277	2,436	
Temperate Hard. Lumber	25,931	22,251		13,408	9,267	
Temperate Hard.Logs	277	152		102	-	
Temperate Hard.Veneer	205	175		1	110	
Softwood Plywood	7,722	2,014		1,908	74	
Other Plywood	148	1		0	0	
Total	40,441	29,841		18,696	11,887	
Total in Dollar equivalent	\$37,278	\$26,715		\$16,950	\$10,538	
% U.S. of Total Value	4.45	3.66		4.49	3.48	
* Revised (Euro's not guilders)						
US\$ 1= Euro	1.085	1.117		1.103	1.128	

SOURCE: Stichting Bos & Hout Statistics

Market Segment Analysis

Social-Economic situation in the Netherlands

The gross domestic product is still increasing but it is estimated that growth in 2002 and 2003 will drop to less than 1 percent. At the same time, unemployment will increase by 5 percent in 2003. Both factors indicate a declining demand for the building production. On the other hand, interest has been low during 2002 and 2003, which in general attracts people to spend money on housing.

The Netherlands: Economic Development					
	1999	2000	2001	*2002	*2003
Gross Domestic Product (%)	4.00	3.30	1.30	0.50	0.75
Unemployment (%)	4.00	3.60	3.30	4.00	5.00
Consumer price inflation (%)	2.20	2.60	4.50	3.50	2.50
Average buying power (%)	-0.21	1.00	6.80	0.25	0.25
Total private consumption (%)	4.70	3.60	1.20	1.25	1.50

Source: Bureau For Economic Policy Analysis (CPB) and 2002 Netherland Central Bank Quarterly Report.

* Estimated

Construction Sector

The construction production in 2001 grew by 2.5 percent to EURO 64.5 billion. Although production grew, during the same year there were indications that 2001 would be the last year of ongoing production growth. For 2002, the building production will be EURO 63.4 billion and this trend is expected to continue into 2003 (EURO 62.3 billion).

In 2001, the housing construction production decreased by 2 percent while the utility construction and infra structure production still grew by respectively 3 and 6 percent. In 2002, the utility construction and infra structure is forecast to decrease as well. For 2003 this trend will continue. The decrease in the housing construction production is driven by less building permits and a downswing in the Dutch conjuncture.

The utility construction production grew steadily from EURO 10.1 billion in 1998 to 12.2 billion in 2001. A change is forecasted for 2002. Unfavorable economical forecasts and its consequences will result in a decrease by 1.5 percent to EURO 12.0 billion for 2002.

The investments in infra structure grew by 5.7 percent in 2001. Investments in 2002 will be similar to the ones in 2001. After 2002, investments will decrease due to lower investments from public utility companies.

Industrial, flexible and easily dismantled construction (IFD) is popular in The Netherlands. Therefore, the use of prefabricated wooden elements is increasing. The most popular US wood used in the Dutch construction industry is Western Red Cedar. This type of wood is mainly used for exterior wall paneling and to some extent for window frames. Douglas Fir is becoming increasingly popular in the Dutch construction industry, especially in the housing industry.

In 1997, the Netherlands signed the "Kyoto agreement", designed to significantly reduce the emission of CO². An important element in this objective is the promotion of wood as a prime building material. The Dutch government had already launched the action plan "20 Percent More Wood in the Construction Industry" in 1995, with the aim to increase the use of wood in the construction industry by 430,000 m³ by 2000. A condition of using wood exclusively from forests under responsible, long-term management programs was included, which therefore excluded the use of most tropical hardwoods. Unfortunately, the goal was not reached in 2000. However, economic growth resulted in a relative increase of more

expensive and larger houses, which caused a slight increase of wood use per house between 1996 and 2000. In addition, the volume of wood used in wooden frame construction increased 29 percent between 1995 and 1997, while the share of plywood grew 37 percent.

To continue the action plan "20 Percent more Wood in the Construction Industry", the Dutch Ministry of Housing, Spatial Planning and Environment launched "Use Durable Produced Wood 2000-2004" program in 2000. Under this program, 27 projects were developed to increase the use of durable wood in the Dutch construction industry. The Dutch Wood Information Center (Centrum Hout) is coordinating these projects. The action plan excludes the use of most tropical hardwoods, so softwood could be used to fill this gap. By itself, softwood is not durable and, as a building material, has to be protected. Currently, around 25 percent of the wood used in the Netherlands is treated with preservative by specialized companies. The modern Dutch timber preservation industry is leading the rest of Europe.

With reference to the action plan "20 Percent more Wood in the Construction Industry", the Dutch government and the Dutch construction industry are developing the implementation plan "More Wood for Construction". This plan would increase the use of wood in the construction industry to decrease the use of concrete sand and mortal sand. The reason behind this objective is the increasing pressure from Dutch environmental groups to slow down the mining of concrete sand, mortal sand and gravel to safeguard the Dutch landscape. To increase the use of wood, the government supports wooden skeleton construction (HSB), wooden floors, wooden carry-constructions, prefabricated wooden elements, timber-piles and wooden bridges.

A possible impact of the above measures on U.S. exports of forest products to the Netherlands is an increase of FSC wood, like certified Western Red Cedar, Douglas Fir, Redwood and Hemlock.

The Netherlands: Building Production by Sector in Million Euro (2,000 prices)				
	2002	2003	2004	2005
Housing Construction	14,910	14,760	15,300	17,580
New Houses	9,320	9,170	9,650	11,060
Renovations	5,590	5,590	5,650	6,520
Utility Construction	11,980	11,480	11,440	11,440
New Buildings	8,060	7,360	7,100	6,900
Renovations	3,920	4,120	4,340	4,540
Infra Structure	7,630	7,400	6,850	6,680
Public Sector	4,130	4,050	3,800	4,050
Market Sector	3,500	3,350	3,050	2,630
TOTAL	34,520	33,640	33,590	35,700
US\$ 1 = Euro	1.060	-	-	-

Source: Ministry of Housing, Special Planning & the Environment

The Dutch Wood Processing Industry

Furniture and Interiors Sector

Dutch furniture industry sales were US \$2.0 billion in 2001. Producers of furniture are doing very well at the moment, however the Dutch furniture industry is facing a challenging future. Low cost countries like Central and Eastern European countries, China and Indonesia have better access to cheap raw material and have cheaper but qualified employees. In addition, the domestic demand for furniture is decreasing due to the current Dutch economy, although demand is expected to increase again in 2004. To compete with lower cost countries, the Dutch furniture industry will increasingly concentrate on the middle and higher segments of the market and try to add value through innovative design, better quality and services.

The Netherlands: Turnover Furniture Industry* in millions of Dutch Guilders				
	1998	1999	2000	2001
Sales	4,764	5,041	5,091	4,833

* Wood & metal

Source: Central Bureau of Statistics

The popularity of (European) oak is currently high, while darker wood varieties are slowly becoming more accepted in The Netherlands. Of the light wood varieties, white oak, beech, cherry, alder and birch are used the most in the Dutch furniture industry. The darker varieties, like walnut and dark oak, increased their market share but it is still small compared to the market share of light wood. However, the trend for the next five years is expected to be darker colors like red, brown and pink. The demand for tropical hardwood like teak, wengé, padoek and palissander is increasing too. Combining wood with rattan, metal, synthetics or glass is getting more attention, partly due to the increasing demand for hard design. In addition, the consumer is looking for comfort and multi-functionality.

The Netherlands: Production of Wooden Furniture and Interiors -----in millions Euros -----				
	1998	1999	2000	2001
Chairs, couches, etc.	554	568	546	599
Office and store furniture, & inter.	637	749	748	641
Bedroom furniture	161	155	153	154
Living room furniture	223	256	240	238
TOTAL	1,575	1,728	1,687	1,632

*

Source: CBS

Both massive wood and veneer find their way to the Dutch furniture industry and they have almost an equal share. The use of multi-plywood is decreasing. In general, veneer wood competes with synthetic, laminated and foliated sheet materials, like MDF. In 2001, the Dutch furniture industry used 205,000 m³ of lumber, 24,000 m³ of imported wooden components and 355,000 m³ of wooden sheet materials. Hardwood has a 64 percent share in total lumber used, with softwood the remaining 36 percent. The most popular lumber species for the furniture industry are deal (30%), European oak (26%), beech (13%), cherry (8%), American oak (7%) and pinewood (6%).

Due to the better exchange rate past six months, exports of U.S. oak to the Netherlands might pick up. The most popular wooden sheet materials are chipboard (48%), MDF (26%), and plywood (21%) with the best prospects for MDF.

Material Handling Industry

The Dutch material handling industry is quite concentrated. Annual total sales of the industry is about US \$ 280 million, with approximately 18 million pallets produced each year. These pallets are used for limited and multiple use, packaging-cases and crates (for vegetables, fruit and wine), and industrial and export packages. The demand for multiple use pallets is increasing, at the expense of limited use pallets. Therefore, there is a shift from the use of hardwood to the use of high quality softwood. Demand for synthetic pallets is also increasing but the market share is small and they only used for specific applications. The most popular lumber species for the material handling industry are deal (62%), pinewood (23%), poplar (8%), and beech (3%). The most popular wooden sheet materials are chipboard (80%), hardboard (7%) and plywood (6%).

The Netherlands: Industrial Sales of Wooden Packaging Material					
----- in millions of guilders -----					
	1997	1998	1999	2000	2001
Wooden Pallets	341	353	327	393	346
One-way Pallets	224	242	223	262	245
Returnable Pallets	118	111	104	132	102
Box Pallets	51	75	65	57	51
Crates	86	88	79	-	-

Source: Central Bureau of Statistics

Strategic Indicator Tables for The Netherlands

Forest Product			
Strategic Indicator Tables for The Netherlands			
CONSTRUCTION MARKET			
	2001	2002	2003
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (thousand units)	73	66	64
--of which, wood frame (thousand units)	7	6	6
--of which, steel, masonry, other materials (thousand units)	66	60	58
--of total starts, residential (thousand units)	--	--	--
----of residential, single family (thousand units)	80%	80%	80%
----of residential, multi-family (thousand units)	20%	20%	20%
--of total starts, commercial (thousand units)	N.A.	N.A.	N.A.
Total Value of Commercial Construction Market (\$US mil)	\$8,712	\$8,792	\$9,755
Total Value of Repair and Remodeling Market (\$US million)	\$5,126	\$5,274	\$5,947
FURNITURE & INTERIORS MARKET			
	Previous	Current	Following
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Housing Starts (number of units)	73,000	66,000	64,000
Total Number of Households ('000 households)	6,867	6,941	7,014*
Furniture Production (\$US million)	\$1,975	\$2,005	\$2,217
Total Furniture Imports (\$US million)	\$1,541	\$1,452	\$1,604
Total Furniture Exports (\$US million)	\$587	\$583	\$645
Interiors Market Size (\$US million)	N.A.	N.A.	N.A.
* FAS estimates			

MATERIAL HANDLING MARKET			
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Value of Industrial Output (\$US million)	\$393	\$399	\$405
New Pallet Production (million units)	N.A.	N.A.	N.A.
FOREST AREA			
Country:	Previous	Current	Following
Report Year:	Calendar Year	Calendar Year	Calendar Year
Total Land Area (million hectares)	3.4	3.4	3.4
Total Forest Area (million hectares)	0.3	0.3	0.3
--of which, Commercial ('000 hectares)	314	314	314
---of commercial, tropical hardwood ('000 hectares)	0	0	0
---of commercial, temperate hardwood ('000 hectares)	155	155	155
---of commercial, softwood ('000 hectares)	159	159	159
Forest Type ('000 hectares)	300	300	300
--of which, virgin ('000 hectares)	0	0	0
--of which, plantation ('000 hectares)	100	100	100
--of which, other commercial (regrowth) ('000 hectares)	239	239	239
Total Volume of Standing Timber (thousand cubic meters)	61,702	60,785	59,881
--of which, Commercial Timber ('000 cum)	57,384	56,532	55,684
Annual Timber Removal ('000 cum) 1/	1,500	1,500	1,500
Annual Timber Growth Rate ('000 cum)	2,400	2,400	2,400
Annual Allowable Cut ('000 cum)	N.A.	N.A.	N.A.
1/ If Removals exceeds growth rate, analyze impact in text.			
WOOD PRODUCTS SUBSIDIES			
Country:	Previous	Current	Following

Year of Report	Calendar Year	Calendar Year	Calendar Year
Total Solid Wood Export Subsidy Outlay (\$US million)	No	No	No
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)	0	0	0
Scope (thousands of hectares)	--	--	--
Are there other wood products export expansion activities? 1/	No	No	No
1/ If yes, describe in report.			
2/ If yes, identify in Tariff and Tax Strategic Indicator Table.			
2/ Calculate as tariff plus other import taxes/fees assuming a commodity value of \$100.			
FOREST PRODUCT TARIFFS AND TAXES TABLE The same for all European Union Countries			

Statistical Tables

Softwood Lumber – PSD & Trade Matrices

PSD Table						
Country	Netherlands					
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	301	221	367	350	0	354
Imports	3023	2669	3090	2535	0	2500
TOTAL SUPPLY	3324	2890	3457	2885	0	2854
Exports	337	211	365	201	0	201
Domestic Consumption	2987	2679	3092	2684	0	2653
TOTAL DISTRIBUTION	3324	2890	3457	2885	0	2854

Import Trade Matrix				Import Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Softwood Lumber			Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Imports for:	2000		2001	Imports for:	2001		2002
U.S.	6,851	U.S.	6,255	U.S.	4,069	U.S.	2,702
Others		Others		Others		Others	
Belgium	115,330		108,409	Belgium	51,168		44,603
Germany	266,311		231,038	Germany	114,915		85,754
Sweden	809,799		831,039	Sweden	349,550		274,981
Norway	110,793		78,358	Norway	41,136		29,800
Finland	576,473		541,918	Finland	272,722		237,527
Russia Fed	559,427		433,908	Russia Fed	194,200		130,163
Latvia	149,618		118,402	Latvia	68,620		50,035
Estonia	82,547		94,257	Estonia	56,805		44,130
Hungary	2,633		773	Belarus	36,359		34,573
Belarus	69,828		71,391	Hungary	346		44,032
Total for Others	2,742,759		2,509,493	Total for Others	1,185,821		975,598
Others not Listed	207,163		153,664	Others not Listed	87,907		83,837
Grand Total	2,956,773		2,669,412	Grand Total	1,277,797		1,062,137

Export Trade Matrix				Export Trade Matrix			
Country	Netherlands						
Commodity	Softwood Lumber			Commodity	Softwood Lumber		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Dec	Units:	m3

Exports for:	2000		2001		Exports for:	2000		2001
U.S.	611	U.S.	4,013		U.S.	1,049	U.S.	8,171
Others		Others			Others		Others	
Belgium	136,208		120,097		Belgium	52,770		65,172
Germany	51,243		25,605		Germany	11,735		13,934
France	18,857		11,993		France	5,823		6,987
Japan	34,218		33,305		Japan	26,399		4,539
Total for Others	240,526		191,000		Total for Others	96,727		90,632
Others not Listed	27,971		16,053		Others not Listed	8,111		5,870
Grand Total	269,108		211,066		Grand Total	105,887		104,673

Softwood Plywood - PSD & Trade Matrices

PSD Table						
Country	Netherlands					
Commodity	Softwood 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	0	0	0	0	0	0
Imports	310	288	350	274	0	274
TOTAL SUPPLY	310	288	350	274	0	274
Exports	16	18	18	17	0	17
Domestic Consumption	294	270	332	257	0	257
TOTAL DISTRIBUTION	310	288	350	274	0	274

Import Trade Matrix				Import Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Softwood Plywood			Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Imports for:	2000		2001	Imports for:	2001		2002
U.S.	25,680	U.S.	6,754	U.S.	6,594	U.S.	251
Others		Others		Others		Others	
France	20,669		12,925	France	6,601		4,620
Belgium	19,669		14,063	Belgium	5,270		5,178
Ireland	14,351		18,088	Ireland	8,314		3,949

Denmark	0		13,986		Denmark	10,601		4,638
Canada	15,892		8,986		Canada	8,986		217
Brazil	13,459		47,994		Brazil	35,366		30,731
Russia Fed	11,608		25,879		Russia Fed	18,226		14,974
Finland	124,617		117,266		Finland	53,330		32,103
Secret	10,262				Chile	6,430		7,617
Total for Others	230,527		259,187		Total for Others	153,124		104,027
Others not Listed	18,098		21,618		Others not Listed	8,319		3,393
Grand Total	274,305		287,559		Grand Total	168,037		107,671

Export Trade Matrix				Export Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Softwood Plywood			Commodity	Softwood Plywood		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Exports for:	2000		2001	Exports for:	2001		2002
U.S.	153	U.S.	33	U.S.	28	U.S.	24
Others		Others		Others		Others	
Belgium	7,684		6,576	Belgium	3,402		2,548
Germany	4,303		4,195	Germany	2,248		
France	1,812		4,467	France	2,010		375

Total for Others	13,799		15,238		Total for Others	7,660	2,923
Others not Listed	793		2,630		Others not Listed	2,130	792
Grand Total	14,745		17,901		Grand Total	9,818	3,739

Other Plywood - Trade Matrices

Import Trade Matrix				Import Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Other Plywood			Commodity	Other Plywood		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Imports for:	2000		2001	Imports for:	2001		2002
U.S.		U.S.	88	U.S.		U.S.	
Others		Others		Others		Others	
France	79,667		77,799	France	33,464		28,733
Belgium	72,394		70,406	Belgium	36,197		27,696
Finland	36,439		36,113	Finland	15,989		12,764
Indonesia	15,480		24,319	Indonesia	9,546		18,014
Russia Fed	10,585		5,984	Russia Fed	4,840		4,003
Israel	8,343		6,513	Israel	4,711		0
Morocco	0		24,810	Morocco	12,932		10,607
Ukraine	2,472		8,068	Ukraine	4,071		3,807
Gabon	0		5,895	Gabon	3,553		3,209
Secret	41,548			China	0		9,088
Total for Others	266,928		259,907	Total for Others	125,303		117,921
Others not Listed	23,612		32,898	Others not Listed	15,770		17,818
Grand Total	290,540		292,893	Grand Total	141,073		135,739

Export Trade Matrix		Export Trade Matrix	
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Country	Netherlands			Country	Netherlands		
Commodity	Other Plywood			Commodity	Other Plywood		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Exports for:	2000		2001	Exports for:	2001		2002
U.S.	89	U.S.	113	U.S.	54	U.S.	252
Others		Others		Others		Others	
Belgium	20,658		18,685	Belgium	8,690		7,960
Germany	3,987		3,814	Germany	2,073		1,139
France	5,635		5,301	France	1,284		2,189
Italy	1,309		1,419	Italy	322		0
Total for Others	31,589		29,219	Total for Others	12,369		11,288
Others not Listed	2,777		2,883	Others not Listed	1,726		1,503
Grand Total	34,455		32,215	Grand Total	14,149		13,043

Temperate Hardwood Lumber - PSD & Trade Matrices

PSD Table						
Country	Netherlands					
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	127	131	114	85	0	80
Imports	271	237	266	225	0	225
TOTAL SUPPLY	398	368	380	310	0	305
Exports	206	32	194	30	0	30
Domestic Consumption	192	336	186	280	0	275
TOTAL DISTRIBUTION	398	368	380	310	0	305

Import Trade Matrix				Import Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Temperate Hardwood Lumber			Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Imports for:	2000		2001	Imports for:	2001		2002
U.S.	30,048	U.S.	24,897	U.S.	14,766	U.S.	10,931
Others		Others		Others		Others	
Germany	50,502		38,988	Germany	20,291		12,441
France	41,271		36,475	France	20,533		13,938
Belgium	25,955		28,671	Belgium	14,711		6,405

Latvia	26,909		20,255		Latvia	15,841		4,576
Lithuania	17,589		18,893		Lithuania	10,642		8,826
Poland	12,786		10,017		Poland	5,683		4,790
Ukraine	10,241		9,181		Ukraine	5,671		4,790
Czech Rep	8,029		6,518		Czech Rep	4,451		1,484
Canada	7,899		3,503		Canada	2,038		1,390
Hungary	7,218		5,005		Hungary	3,043		2,480
Total for Others	208,399		177,506		Total for Others	102,904		61,120
Others not Listed	38,842		34,489		Others not Listed	21,327		13,332
Grand Total	277,289		236,892		Grand Total	138,997		85,383

Export Trade Matrix				Export Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Temperate Hardwood Lumber			Commodity	Temperate Hardwood Lumber		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Exports for:	2000		2001	Exports for:	2001		2002
U.S.	630	U.S.	173	U.S.	170	U.S.	61
Others		Others		Others		Others	
Belgium	10,177		14,791	Belgium	7,520		3,872
Germany	7,663		4,504	Germany	2,722		1,853
France	6,343		3,953	France	2,199		1,175
United Kingdom	3,260		2,126	United Kingdom	1,303		777
Japan	9,238		1,260	Japan	1,098		0

Total for Others	36,681		26,634		Total for Others	14,842	7,677
Others not Listed	8,366		5,589		Others not Listed	2,939	2,914
Grand Total	45,677		32,396		Grand Total	17,951	10,652

Temperate Hardwood Veneer - PSD & Trade Matrices

PSD Table						
Country	Netherlands					
Commodity	Hardwood Veneer (Temperate)				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	8	7	8	7	0	7
TOTAL SUPPLY	8	7	8	7	0	7
Exports	2	4	2	4	0	4
Domestic Consumption	6	3	6	3	0	3
TOTAL DISTRIBUTION	8	7	8	7	0	7

Import Trade Matrix				Import Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Hardwood Veneer (Temperate)			Commodity	Hardwood Veneer (Temperate)		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Imports for:	2000		2001	Imports for:	2001		2002
U.S.	123	U.S.	85	U.S.	1	U.S.	60
Others		Others		Others		Others	
Germany	3120		2384	Germany	1132		665
Belgium	2361		2400	Belgium	348		455
France	308		254	France	174		188

Poland	423		354		Poland	126		105
Hungary	554		731		Hungary	348		468
Total for Others	6766		6123		Total for Others	2128		1881
Others not Listed	902		549		Others not Listed	361		112
Grand Total	7791		6757		Grand Total	2490		2053

Export Trade Matrix				Export Trade Matrix			
Country	Netherlands			Country	Netherlands		
Commodity	Hardwood Veneer (Temperate)			Commodity	Hardwood Veneer (Temperate)		
Time period	Jan-Dec	Units:	m3	Time period	Jan-Jun	Units:	m3
Exports for:	2000		2001	Exports for:	2001		2002
U.S.	33	U.S.	49	U.S.	36	U.S.	32
Others		Others		Others		Others	
Belgium	417		263	Belgium	148		0
Spain	442		525	Spain	365		61
Italy	179		150	Italy	69		0
Ireland	163		189	Ireland	117		0
Germany	98		501	Germany	336		19
Poland	362		338	Poland	184		36

Portugal	62		99		Portugal	35		34
Total for Others	1723		2065		Total for Others	1254		150
Others not Listed	245		2243		Others not Listed	330		356
Grand Total	2001		4357		Grand Total	1620		538