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ABSTRACT

The *Forest Products Annual Market Review 2019-2020* provides a comprehensive analysis of markets in the UNECE region and reports on the main market influences outside the UNECE region. It covers the range of products from the forest to the end user - from roundwood and primary processed products to value-added, housing and wood energy. Statistics-based chapters analyse the markets for wood raw materials, sawnwood, wood-based panels, paper, paperboard and woodpulp. Underlying the analysis is a comprehensive collection of data. The *Review* highlights the role of sustainable forest products in international markets. Policies concerning forests and forest products are discussed, as well as the main drivers and trends. The *Review* also analyses the effects of the current economic situation on forest products markets.

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FOREWORD

The forest sector is unaccustomed to rapid change. Tending a forest from seed to harvest can span decades in some places and more than a century in others. Most forest products today remain unchanged from 50 years ago; manufacturing processes have evolved and been mechanized, but the process and products change little from year to year and, when they do, always in a measured, incremental way. What we think of as “new” forest products, such as wood pellets for energy and cross-laminated timber, are not so new at all; wood pellets were first produced in the 1970s, and they were preceded by a similar product called “presto logs” as far back as the 1930s. Cross-laminated timber has been manufactured and used for almost 20 years now, although only recently has its versatility been fully recognized. In fact, one of the hallmarks of forest product markets is their consistency and predictability, which fits well with the “rear-view mirror” vantage of the *Forest Products Annual Market Review* because trends in one year have a good track record as an indicator of what to expect in the next.

By all measures, 2019 was a “normal and predictable” year for the forest products sector. A bark-beetle epidemic in central Europe created an overabundance of raw materials, which lowered prices and led to an increase in exports; it also has ramifications for future wood supply. But this type of event has happened before and will happen again, and the forest products industry knows what it must do to cope with such situations. This year, 2020, started as 2019 left off – but then COVID-19 hit. Initially, the forest sector in most of the UNECE region was less affected by the pandemic than many other industries. Most governments deemed forestry and forest products as essential industries and both continued to operate during lockdowns; surprisingly, too, there has been better-than-expected continuity in demand for most forest products. Nevertheless, the potential remains for far-reaching, longer-term effects.

COVID-19 has had short-term health and economic impacts on the forest sector related to worker well-being and availability; the impact of reduced incomes and economic activity on the purchase of forest products; and the effect of increased working from home on household purchases of certain forest products, such as office furniture and wood for do-it-yourself projects. The longer-term effects are unclear, but many questions arise: Will there be a glut of empty buildings in urban centres, dampening new construction, as a result of the success of working from home? Will there be an exodus from high-cost, long-commute urban centres such as Paris, New York and London, with people now able to work from home in areas with a lower cost of living? Will COVID-19 reduce demand for open-space buildings for those who stay in the office? Will the trend away from bricks-and-mortar retail buildings towards online shopping intensify? An answer of “yes” to any of these questions would have a strong impact on future demand for forest products.

This year’s *Forest Products Annual Market Review* sets out developments in the pre-COVID-19 forest sector in 2019, provides a first glimpse into the sector during the pandemic, and offers food for thought on what the future holds. As always, the publication benefited from the inputs of a group of leading experts as authors, who have combined their market intelligence and knowledge with the data gathered by the UNECE/FAO team.



Vladimir RAKHMANIN

Assistant Director-General,

Regional Representative for Europe and Central Asia of the
Food and Agriculture Organization of the United Nations



Olga ALGAYEROVA

Under-Secretary-General of the United Nations,

Executive Secretary of the United Nations
Economic Commission for Europe

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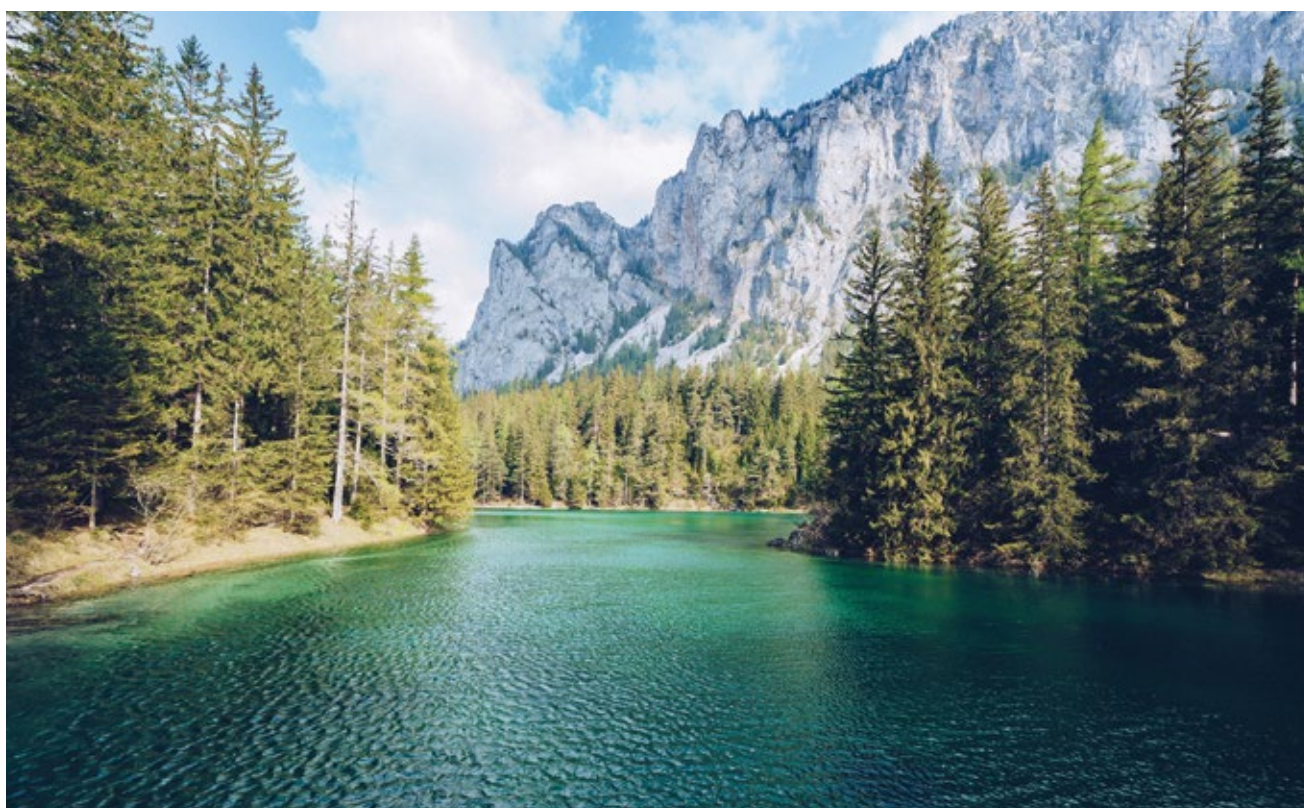
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The *Forest Products Annual Market Review* is the result of a cooperative effort involving a network of official country correspondents, authors, reviewers, editors, the UNECE/FAO Team of Specialists on Sustainable Forest Products and a team of people working in the Forestry and Timber Section in Geneva and in FAO, Rome. In combination, this network provides an unrivalled source of expertise and knowledge, which is the hallmark of the *Review*.

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The authors are as follows:

Orifjon Abidov	Kathryn Fernholz	Frances Maplesden
Francisco Aguilar	Christopher Gaston	Igor Novoselov
Eduard Akim	Branko Glavonjić	Tapani Pahkasalo
Delton Alderman	Antti Koskinen	José Palacín
Matthew Bumgardner	Klaus Kottwitz	Russ Taylor
Ivan Eastin	William Luppold	Michel Valois
Håkan Ekström	Warren Mabee	

In the UNECE/FAO Forestry and Timber Section, Alex McCusker analysed the data and trends; and Gianluca Sambucini and Paola Deda proofread the chapters.

The project was managed by Florian Steierer. Matt Fonseca provided guidance on content and proofread the text. The chapters were reviewed at FAO by Pierre Bouillon, Thais Juvenal, Alicja Kacprzak, Arvydas Lebedys, Zuzhang Xia and Ekrem Yazici.

The manuscript was checked by Eoin O'Driscoll, Marketing Consultant, Drima Marketing Research. Alastair Sarre edited the text. The Printing Section of the United Nations Office Geneva provided layout and printed the publication.

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