

EATTA

25 September, 2013

# The UK

## 2012 Softwood Consumption

- Where we were

## 2013 Softwood Imports, UK Production, Consumption

- Where we are **-6%**
- Why we are where we are
- Where we may be @ end 2013

## 2014 Softwood Imports, UK Production, Consumption

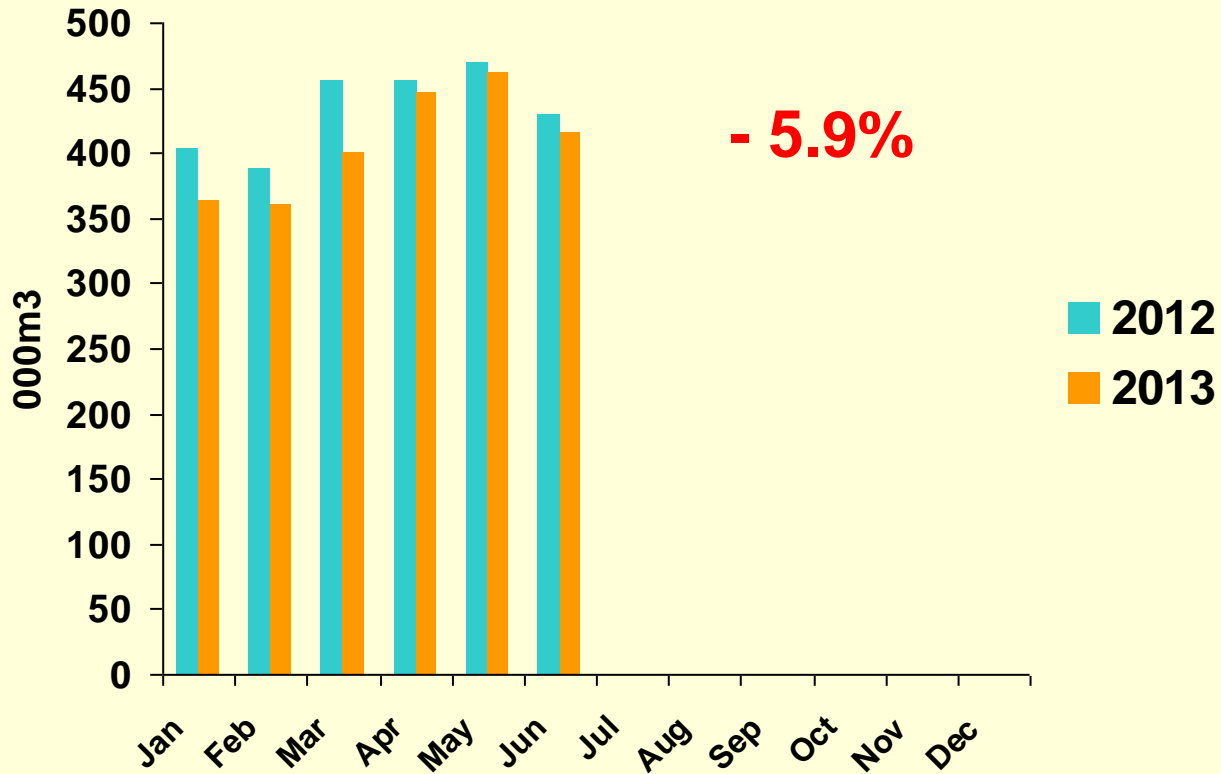
- Where we may be @ end 2014

# UK Softwood Consumption – Where we were

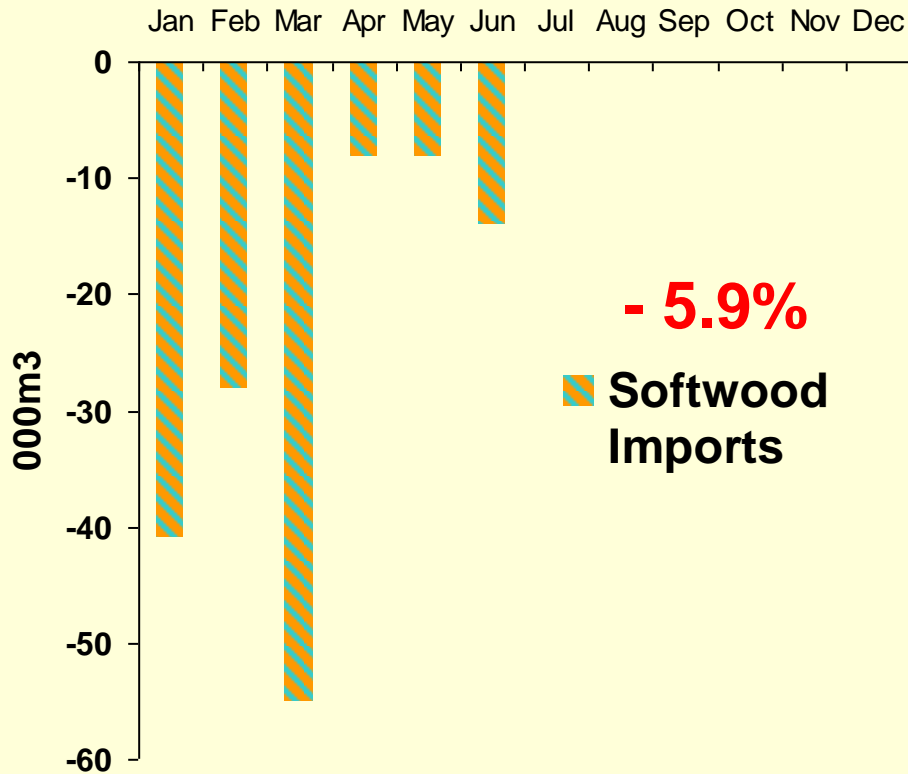
000m<sup>3</sup>

	2011	2012	% Change
Imports	4,526	4,756	+ 5.1%
UK Production	3,227	3,357	+ 4.0%
Exports	131	116	- 11.2%
Consumption	7,623	7,997	+ 4.9%

# Softwood Imports 2013 – Where we are

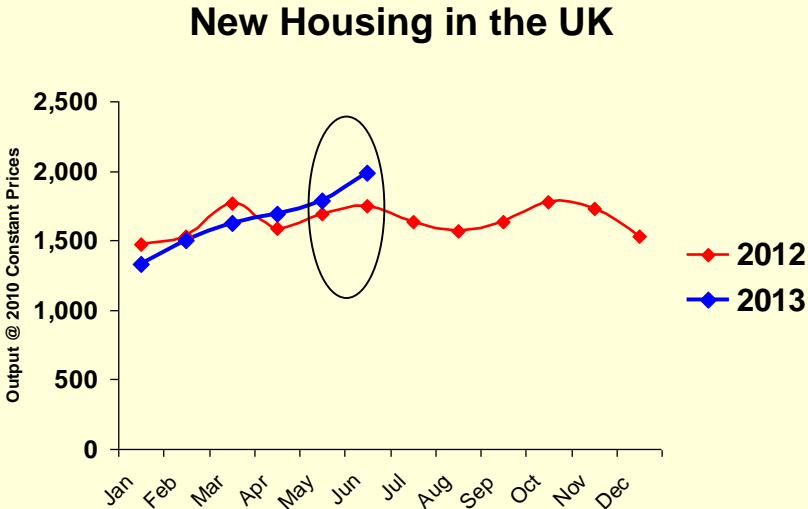
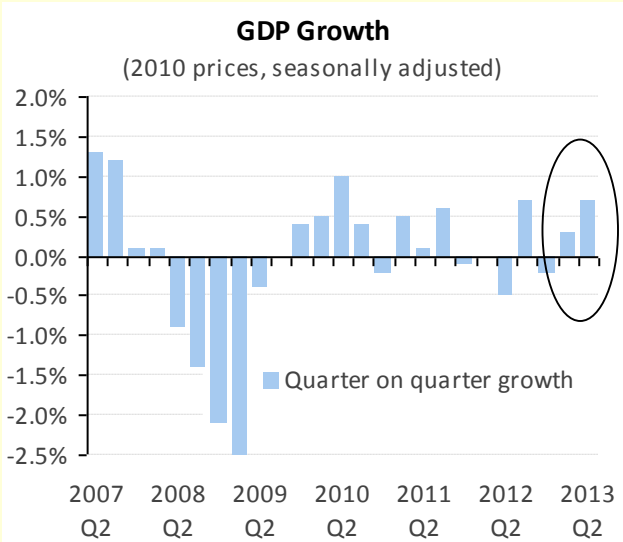


# Softwood Imports 2013 – Where we are

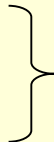


# Softwood Imports 2013

## - Why



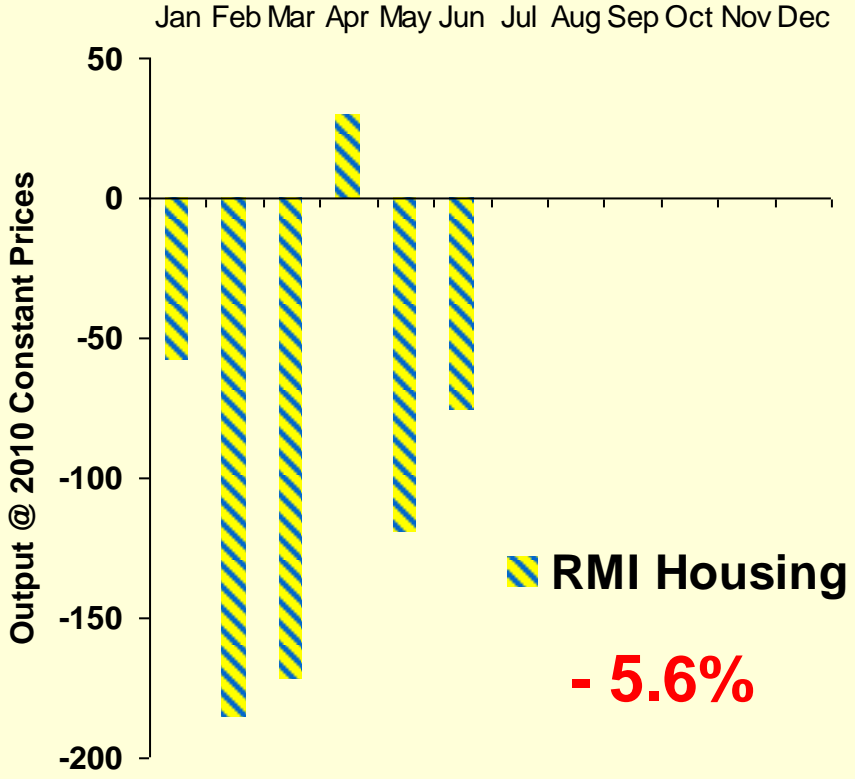
Pallets & Packaging  
Fencing & Outdoor



- 6%?

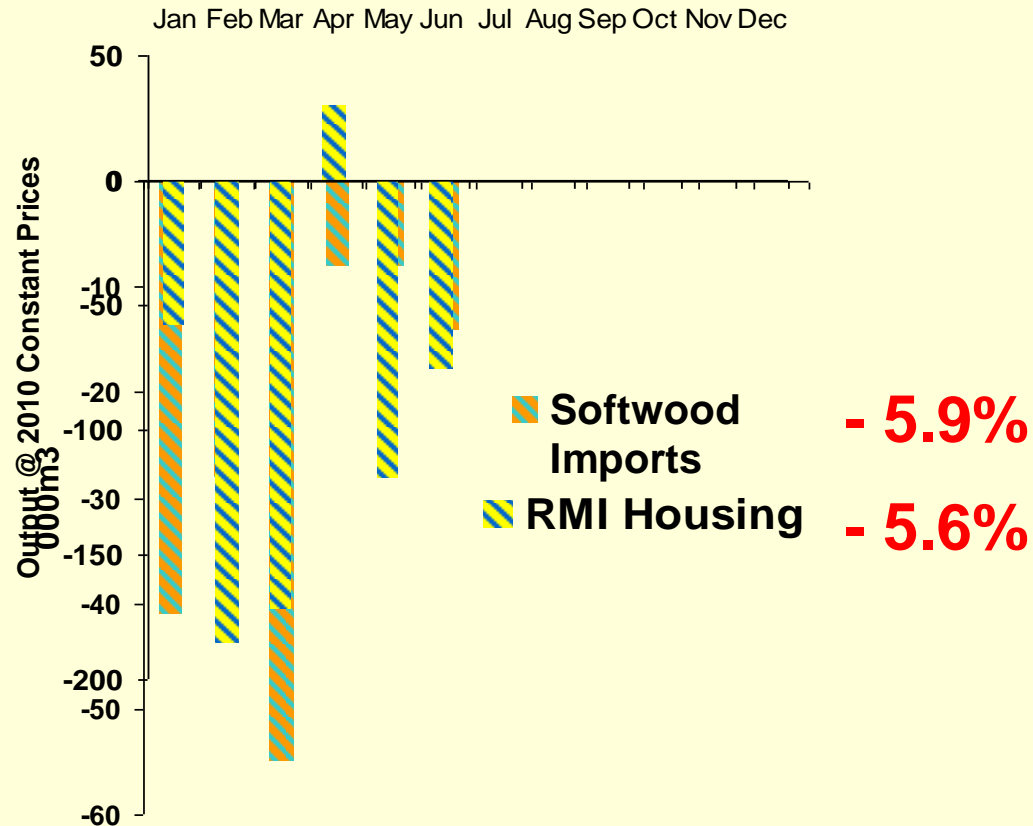
# Softwood Imports 2013

## - Why



# Softwood Imports 2013

- Why we are where we are





# Softwood Imports 2013

## - Where we might be

000m<sup>3</sup>

	2011	2012	2013	% Change
Imports	4,526	4,756	4,581	- 3.7%
UK Production	3,227	3,357	3,442	+ 2.5%
Exports	131	116	130	+ 12.1%
Consumption	7,623	7,997	7,893	- 1.3%

# 2013 Softwood Import Forecast

Market/ Country	Construction		Pallets & Packaging	Fencing & Outdoor	Other Markets	Total All Markets
	New Housebuilding	All Other Construction				
Sweden						2,183,171
Finland						629,056
Latvia						570,618
Ireland						370,658
Germany						262,273
Russia						225,000
Estonia						88,010
Others						252,498
Total						4,581,284

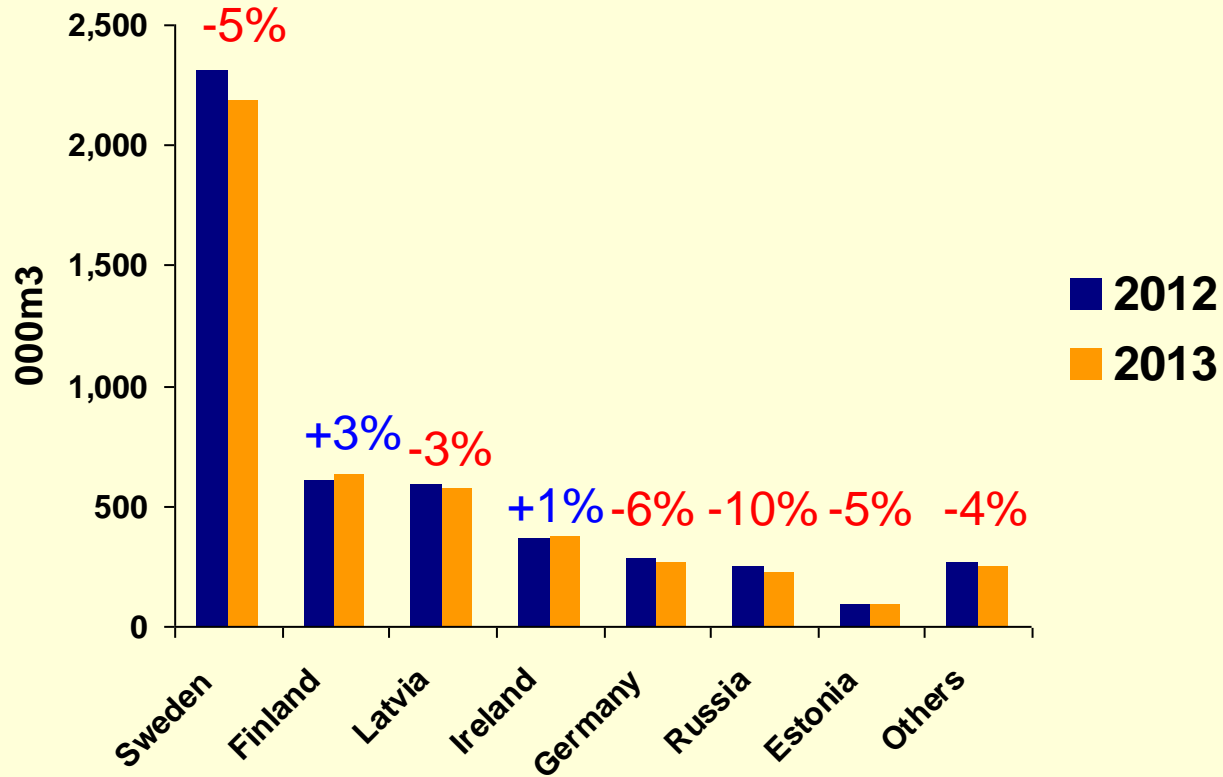
# 2013 Softwood Import Forecast

Market/ Country	Construction		Pallets & Packaging	Fencing & Outdoor	Other Markets	Total All Markets
	New Housebuilding	All Other Construction				
Sweden	167,955	1,923,042	39,524	31,000	21,650	2,183,171
Finland	34,875	584,853	4,821	2,500	2,007	629,056
Latvia	1,350	298,698	155,570	54,000	61,000	570,618
Ireland	16,483	233,495	63,930	32,500	24,250	370,658
Germany	21,390	231,016	4,568	2,500	2,800	262,273
Russia	2,250	68,750	56,250	82,750	15,000	225,000
Estonia	2,580	53,955	19,475	6,240	5,760	88,010
Others	3,586	187,263	33,715	14,449	13,486	252,498
<b>Total</b>	<b>250,468</b>	<b>3,581,072</b>	<b>377,852</b>	<b>225,939</b>	<b>145,952</b>	<b>4,581,284</b>

# UK Softwood Consumption by Market in 2013

000m <sup>3</sup>	2013 Forecast	%
Construction	4,779	61%
Pallets & Packaging	1,396	18%
Fencing & Outdoor	1,476	19%
Other	242	3%
Total Consumption	7,893	100%

# UK Softwood Imports by Country - 2013/2012



# Softwood Imports 2014

## - Where we might be

000m<sup>3</sup>

	2011	2012	2013	2014	% Change
Imports	4,526	4,756	4,581	4,661	+ 1.7%
UK Production	3,227	3,357	3,442	3,577	+ 3.9%
Exports	131	116	130	135	+ 3.8%
Consumption	7,623	7,997	7,893	8,103	+ 2.7%

# Softwood Import Forecast 2014

Market/ Country	Construction		Pallets & Packaging	Fencing & Outdoor	Other Markets	Total All Markets
	New Housebuilding	All Other Construction				
Sweden						2,189,286
Finland						649,831
Latvia						600,427
Ireland						377,486
Germany						270,983
Russia						225,000
Estonia						91,192
Others						256,898
Total						4,661,103

# Softwood Import Forecast 2014

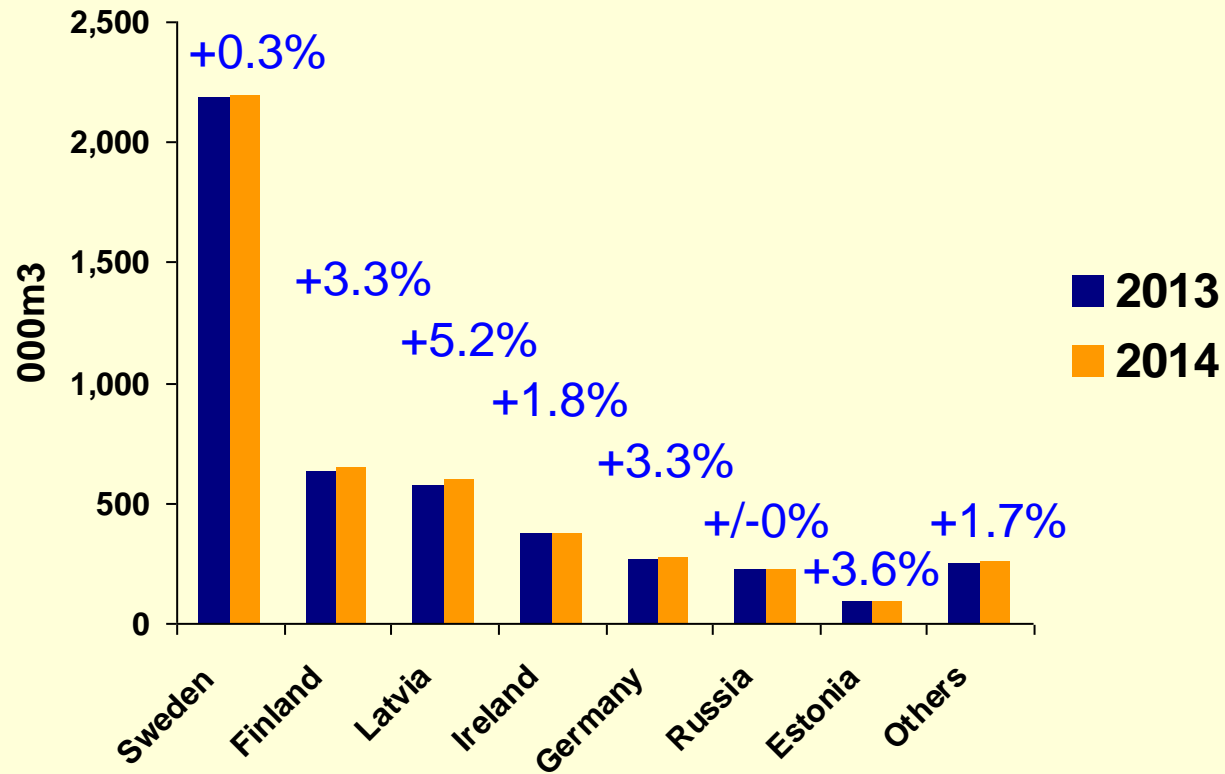
Market/ Country	Construction		Pallets & Packaging	Fencing & Outdoor	Other Markets	Total All Markets
	New Housebuilding	All Other Construction				
Sweden	174,602	1,921,890	39,724	31,210	21,860	2,189,286
Finland	35,833	604,453	4,935	2,563	2,047	649,831
Latvia	1,404	316,620	161,793	57,780	62,830	600,427
Ireland	16,682	238,235	65,527	32,675	24,368	377,486
Germany	22,064	238,782	4,692	2,569	2,877	270,983
Russia	2,250	68,750	56,250	82,750	15,000	225,000
Estonia	2,632	56,113	19,670	6,614	6,163	91,192
Others	3,649	190,525	34,302	14,701	13,721	256,898
Total	259,116	3,635,368	386,891	230,862	148,865	4,661,103



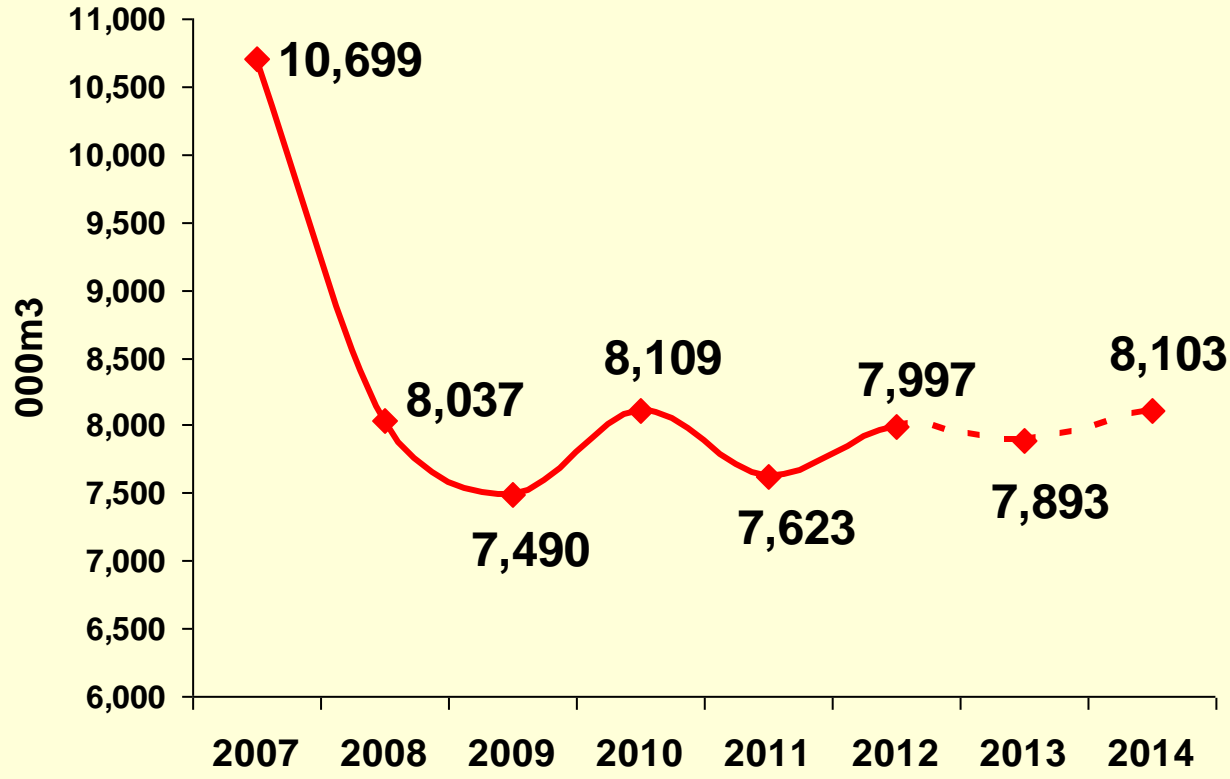
# UK Softwood Consumption by Market in 2013 & 2014

000m <sup>3</sup>	2013	2014	% Diff
Construction	4,779	4,879	+ 2.0%
Pallets & Packaging	1,396	1,445	+ 3.5%
Fencing & Outdoor	1,476	1,530	+ 3.7%
Other	242	248	+ 2.8%
Total Consumption	7,893	8,103	+ 2.7%

# UK Softwood Imports by Country - 2014/2013



# UK Softwood Consumption Trends



LONG  
HARD  
ROAD

