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Issue 8

Die österreichischen Holzmärkte

Größenordnungen - Strukturen - Veränderungen

The Austrian Wood Markets

Magnitudes - Structures - Changes

Peter Schwarzbauer

Der vorliegende Band "Die österreichischen Holzmärkte" enthält eine kompakte Zusammenfassung und Aufbereitung öffentlich zugänglicher Daten über österreichische und internationale Holzmärkte. Die Studie versucht der Tatsache Rechnung zu tragen, dass es wegen der zersplitterten Datenlage oft auch für "Insider" schwer ist, sich eine breite Übersicht über Größenordnungen, Strukturen sowie nationale und internationale Stellung dieser Wirtschaftszweige zu verschaffen.

Im Vordergrund steht die Darstellung folgender Roh- und Halberzeugnisse aus Holz:

- Rohholz (inkl. Sägenebenprodukte)
- Schnittholz (inkl. Schwellen und Behauholz)
- Holzplatten (Faser-, Spanplatten, Sperrholz, Furniere, Massivholzplatten)
- Holzstoff, Zellstoff, Altpapier
- Papier und Pappe

Aufgrund der dynamischen Entwicklungen auf Holzmärkten haben Veröffentlichungen über das Marktgeschehen eine relativ kurze "Halbwärtszeit". Um der zu raschen Veralterung etwas entgegen zu wirken, stehen nicht so sehr die in den meisten Datenquellen publizierten jährlichen bzw. kurz-fristigen Veränderungen, sondern vielmehr lang- und mittelfristige Entwicklungen im Vordergrund.

The present volume "The Austrian Wood Markets" contains a compact description and analysis of publicly available data on Austrian and international wood markets. The study tries to overcome the fact that because of very fragmented data even "insiders" sometimes have a hard time to get a broad overview on magnitudes, structures as well as the internaitonal position of these economic branches.

The following forest products are focused upon:

- Roundwood (incl. sawmill residues)
- Sawnwood (incl. sleepers)
- Wood-based panels (fibre-, particleboard, plywood, veneer sheets, laminated sawnwood panels)
- Pulp and waste (recycled) paper
- Paper and paperboard

Because of wood market dynamics, publications about markets are generally quickly outdated. To counteract this fact this study mainly focuses on mid- and long-term rather than on short-term/annual changes.

Summary

This study contains a description of the scope, structure and long term development of the Austrian forest sector. Only marketable goods based on wood are included.

Position of the forest sector within the general Austrian economy

The position of the forest sector within the overall Austrian economy can be characterized as follows:

- The measurable economic contribution of the forest sector to the general economy is relatively small (4.3% of GDP in 2002) with the exception of foreign trade (9% of all exports).
- The relative share of the forest sector of the overall economy has - congruent with the share of the entire production sector - substantially decreased over the last decades. Nevertheless, the wood industry was able to increase its share within the production sector.

Forest resources

Expressed in absolute figures and relative shares, Austria is one of the most important "forest countries" internationally seen, although it holds only 2.3% of the European forest area and 0.1% of the world's forests. Forests cover 47% of the entire Austrian land base, a share which is high above the European share (31%), the European-Union-15 share (36%) and the world share (27%). Furthermore, Austria is one of the leading countries in growing stock per hectare; its share of European growing stock is more than twice as high as its share in forest area (four times higher worldwide). 85% of Austrian forests are available for timber supply, a percentage far above that of most other countries.

Roundwood production

In roundwood production, Austria ranks 8th in Europe and 40th worldwide. Coniferous sawlog production amounts to 7% of European-Union-15 and 1% of world production. Per-capita production has increased over the past decades in Austria and Europe, but has decreased globally (population growth in developing countries). The growth of Austrian pulpwood production per-capita since 1966 (+54%) is remarkably high. Fuelwood production differs significantly from other European countries; per-capita production is far above the European average and even higher than the world average.

Production of wood products

In coniferous sawnwood production Austria ranks 4th European-wide and 8th globally. In 2002, Austria produced 14% of the coniferous sawnwood in the European-Union-15, 8% of wood based panels and 5% of paper and paperboard. World production shares lie between 1% (paper) and 4% (coniferous sawnwood). Per-capita production of coniferous sawnwood is twenty-five times higher than the world average, fourteen times higher for wood based panels and eleven times higher for paper and paperboard. Furthermore, production increases during the last decades are far above those of most other regions.

Domestic consumption of wood products

In 2002, Austria consumed 7% of coniferous sawnwood, 3% of panels and 3% of paper in the European-Union-15. World shares are about 1-2%. Per-capita consumption of wood products is higher than the European average and lies many times above the worldwide average.

Between 1965 and 1998, Austrian domestic wood consumption (measured in roundwood equivalents) more than doubled (+118%). During the same period, European consumption only increased by 30%, worldwide consumption by 25%.

Foreign trade

Austria is a net-importer of roundwood. In 2002, Austria (net-)imported about one third of the coniferous industrial roundwood of the whole European-Union-15 (in terms of net-imports). This amounts to 6% of total world roundwood imports. In terms of roundwood imports, Austria ranks 7th globally and 3rd in Europe.

Austria is a net-exporter of wood products. Net-exports of coniferous sawnwood in 2002 amounted to eight times the net-exports of the European-Union-15, or 5% of total world exports. Worldwide, Austria is the 5th biggest exporter of coniferous sawnwood.

Long-term future perspectives

International studies by the UN-ECE/FAO predict increases in production of and demand for wood products in Austria and Europe as a whole. One general important finding is that Austrian production of wood products can only be increased if net-imports of roundwood, sawmill residues, waste paper and pulp rise significantly. The share of raw material net-imports of total Austrian wood and fibre supply is expected to increase from about 27% (2000) to 33-37% (2020). The share of domestic removals of the total Austrian wood and fibre supply is expected to decrease from about 48% (2000) to 37-40% (2020). Regarding these aspects, the Austria' future is in line with the results for Europe as a whole.

Another general finding is that in terms of growth, Austria performs better than the entire current EU/EFTA region, but less well than the CEEC and CIS countries. This indicates that Austria may lose some of its competitiveness to Eastern Europe. However, compared to Europe as a whole (incl. CEEC and CIS) Austrian growth rates are quite similar.

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An die

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