

Der Holzmarkt – Trends und Aussichten

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Agenda

- Produktion folgt der reduzierten Nachfrage
- Holzindustrie Österreichs ist in der Wertschöpfungstiefe weltweit TOP
- Holzindustrie exportiert 50% der Produktion, daher sind auch die internationale Märkte essentiell

Nationale Marktthemen von

KommR Wolfgang Hutter - FG Obmann Holzindustrie SBG

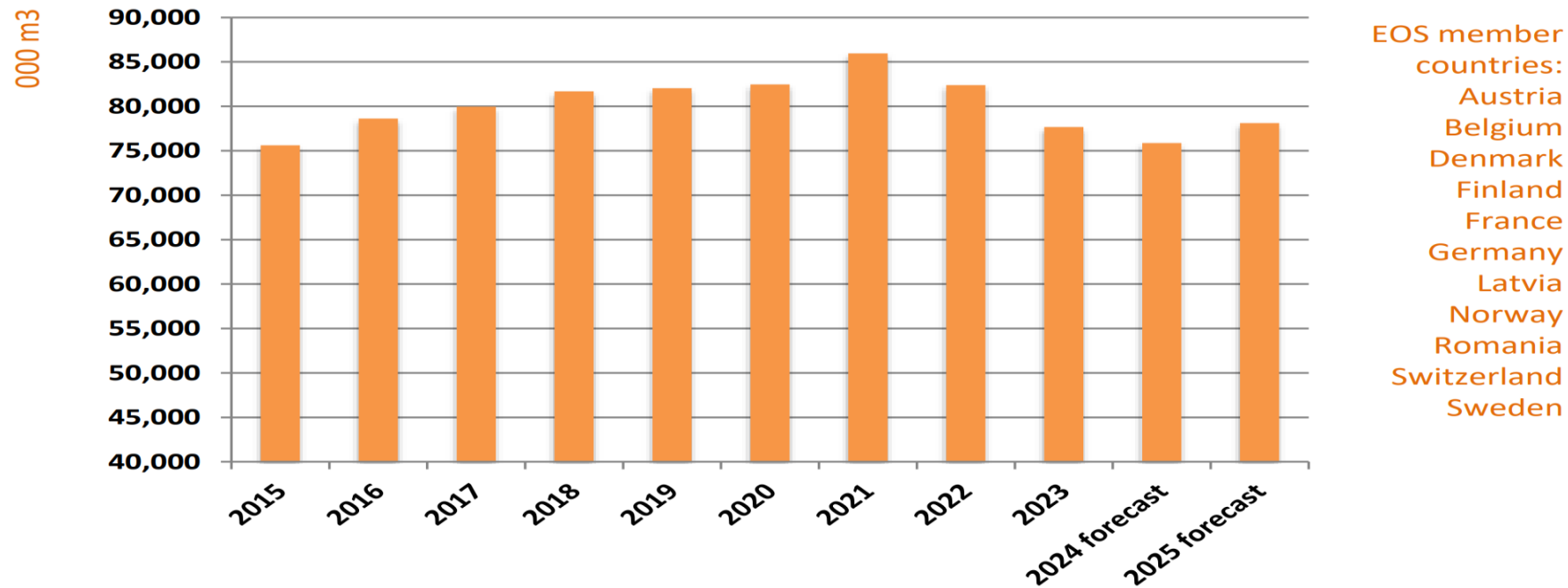
Ing. Ferdinand Reisecker - FG Obmann Holzindustrie OÖ

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EOS Production overview:

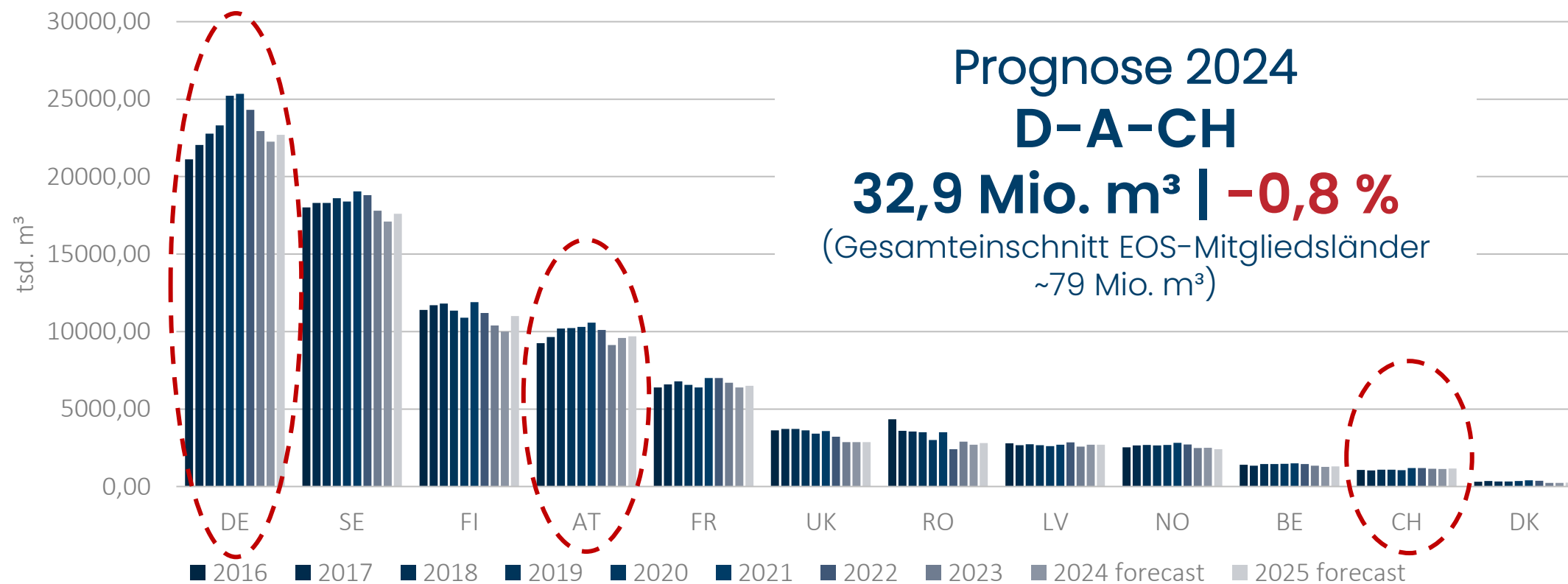


After peaking in 2021, production in the EOS countries declined significantly over the last few years to adjust to the demand decline. If forecasts for 2024 are confirmed, at the end of the year production will be 12% lower than in 2021. Next year production is expected to grow by 2-3%.



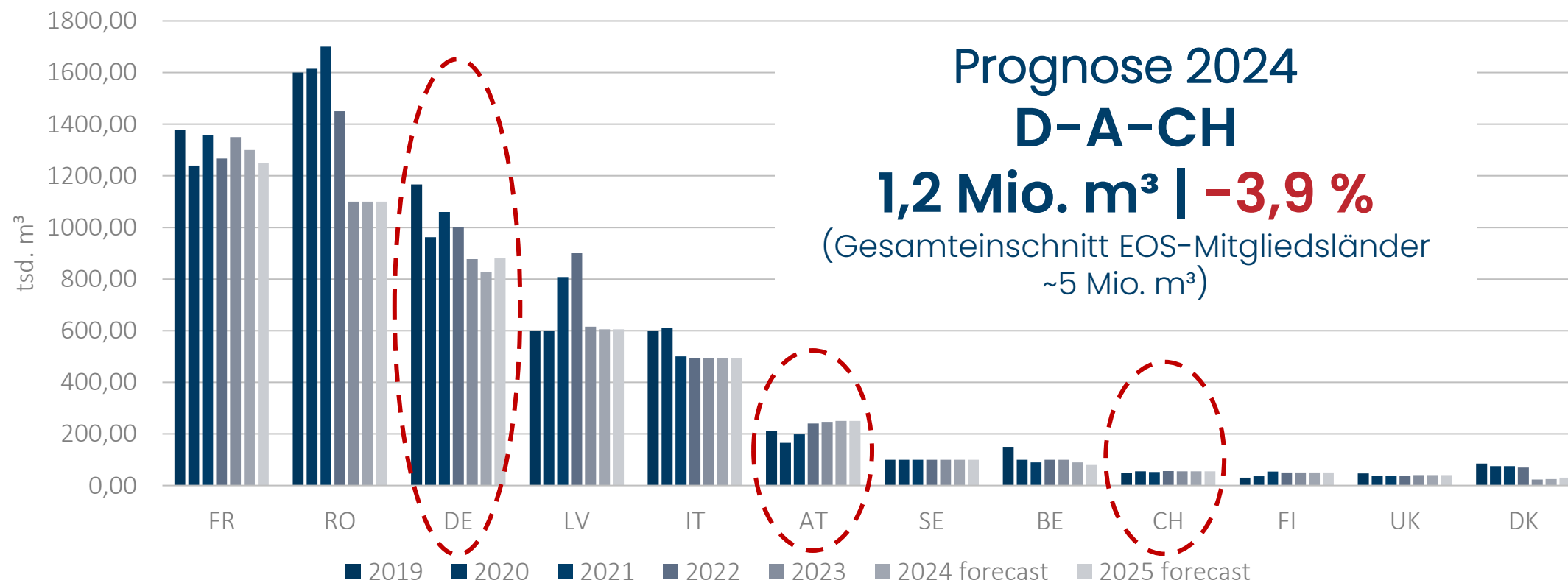
SAWN SOFTWOOD PRODUCTION OF EOS MEMBERS

Sawn Softwood Production in Europe



SAWN HARDWOOD PRODUCTION OF EOS MEMBERS

Sawn Hardwood Production in Europe

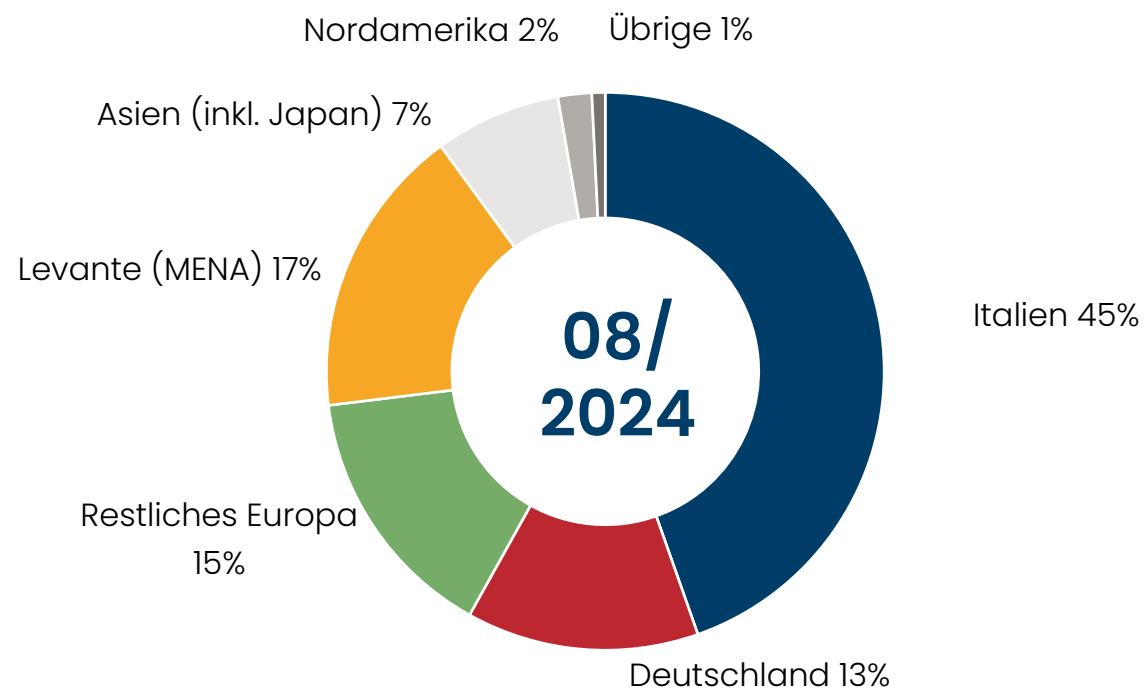


EXPORT 2024 (VORLÄUFIGE ZAHLEN)

Exportzahlen für Nadelschnittholz Aug. 2024

Angaben in m ³	01-08 2024	Diff.	01-08 2023
Italien	1 700 367	-0,2%	1 704 119
Deutschland	513 734	-2,9%	529 085
Restliches Europa	570 226	17,9%	483 638
Levante (MENA)	644 474	25,4%	514 110
Asien (inkl. Japan)	278 560	37,4%	202 743
Nordamerika	74 634	-14,7%	87 465
Übrige	29 384	-1,7%	29 889
Total	3 811 379	7,3%	3 551 049

* Übrige: Länder weltweit

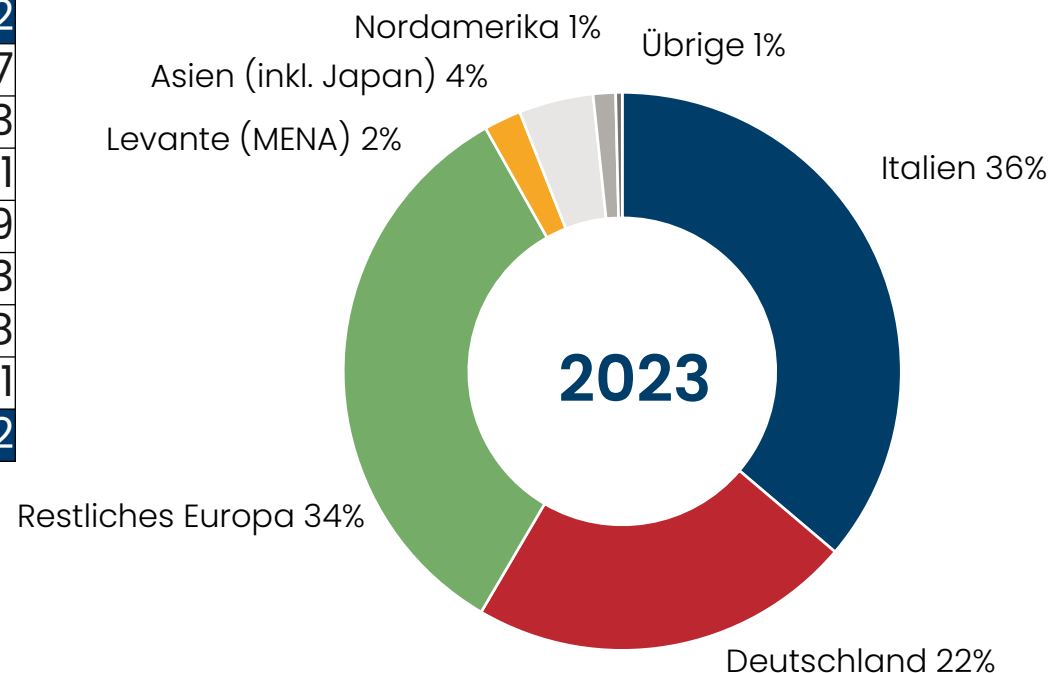


EXPORT 2023 (ENDGÜLTIGE ZAHLEN)

Exportzahlen für Lamellenholz 2023 : 2022

Angaben in m³	01-12 2023	Diff.	01-12 2022
Italien	672 781	-5,3%	710 157
Deutschland	413 550	-15,0%	486 593
Restliches Europa	620 941	2,2%	607 351
Levante (MENA)	40 154	-3,2%	41 469
Asien (inkl. Japan)	80 223	-34,9%	123 143
Nordamerika	24 106	30,4%	18 488
Übrige	7 080	-35,8%	11 031
Total	1 858 835	-7,0%	1 998 232

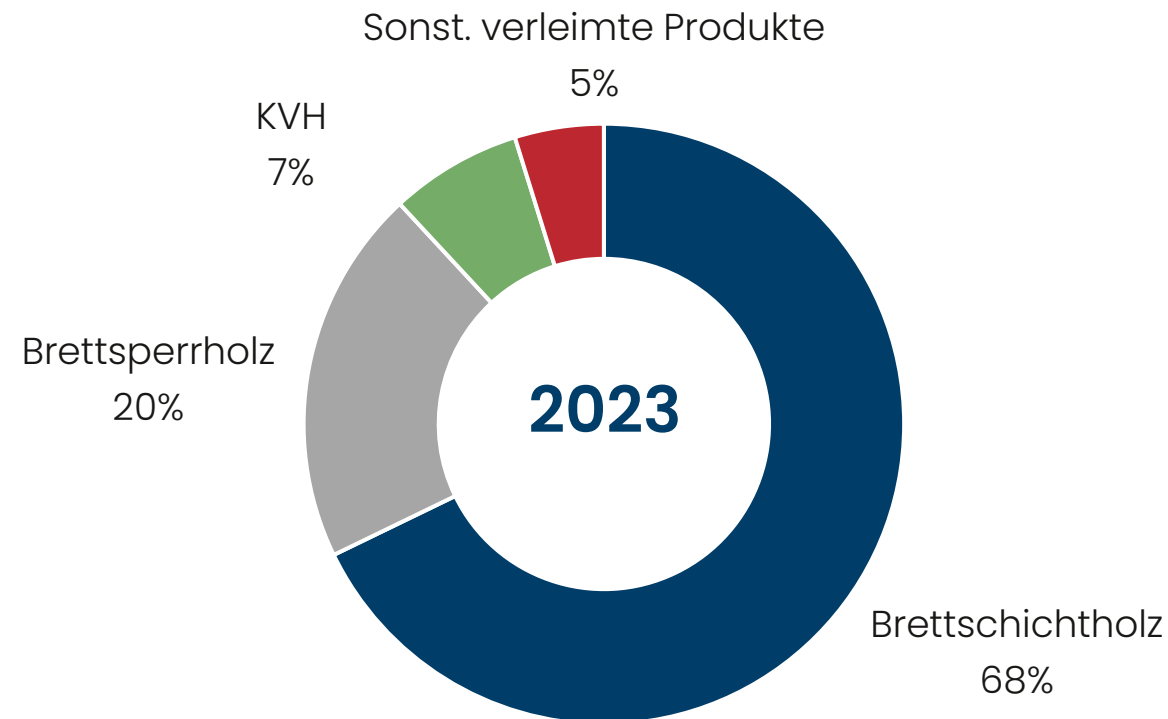
* Übrige: Länder weltweit



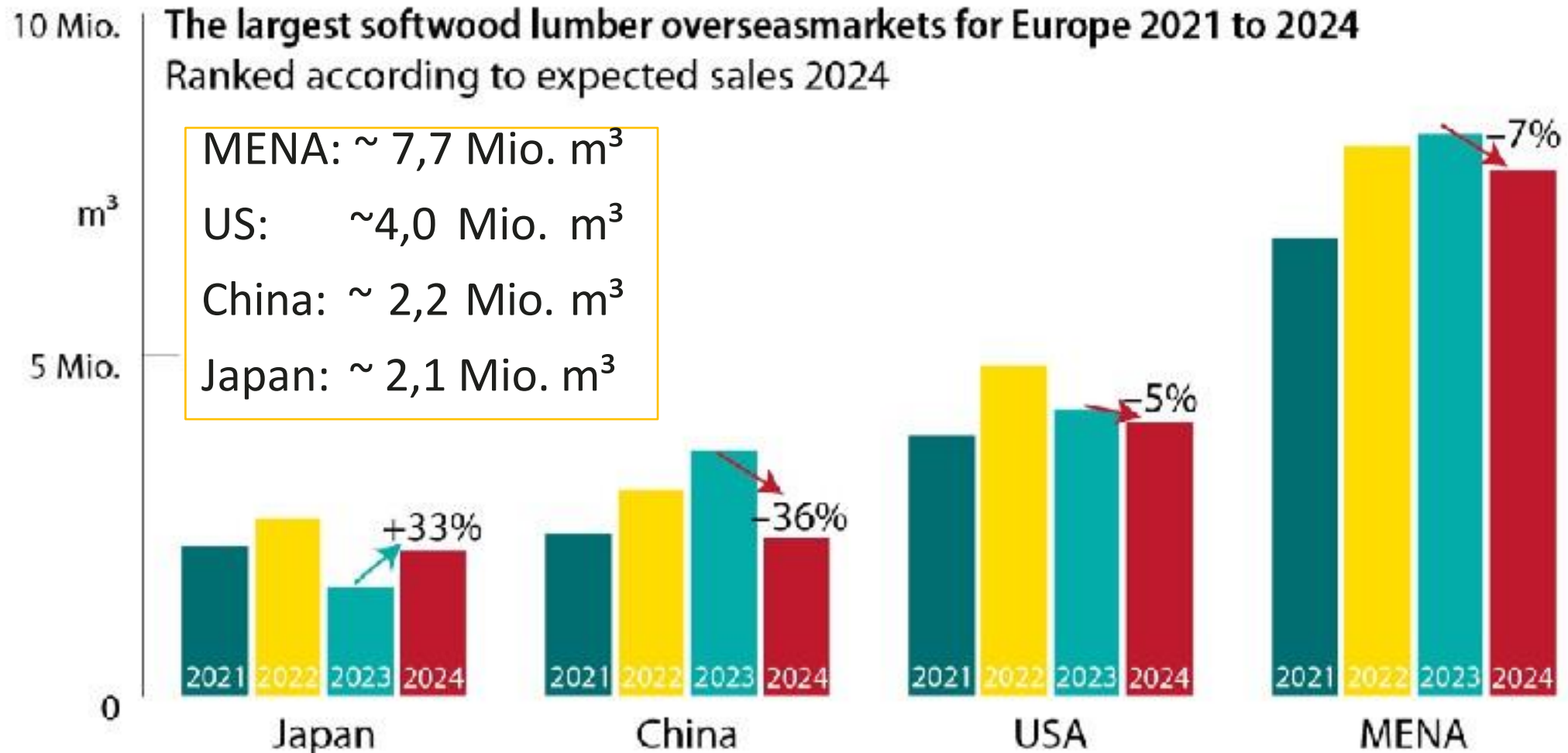
EXPORT 2023 (ENDGÜLTIGE ZAHLEN)

Exportzahlen für verleimte Produkte 2023 : 2022

Angaben in m³	01-12 2023	Diff.	01-12 2022
Brettschichtholz	1 357 001	-5%	1 435 262
Brettsperrholz	405 908	-7%	434 374
KVH	142 171	-42%	244 685
Sonst. verleimte Produkte	95 925	-25%	128 595
Gesamt	2 001 006	-11%	2 242 917



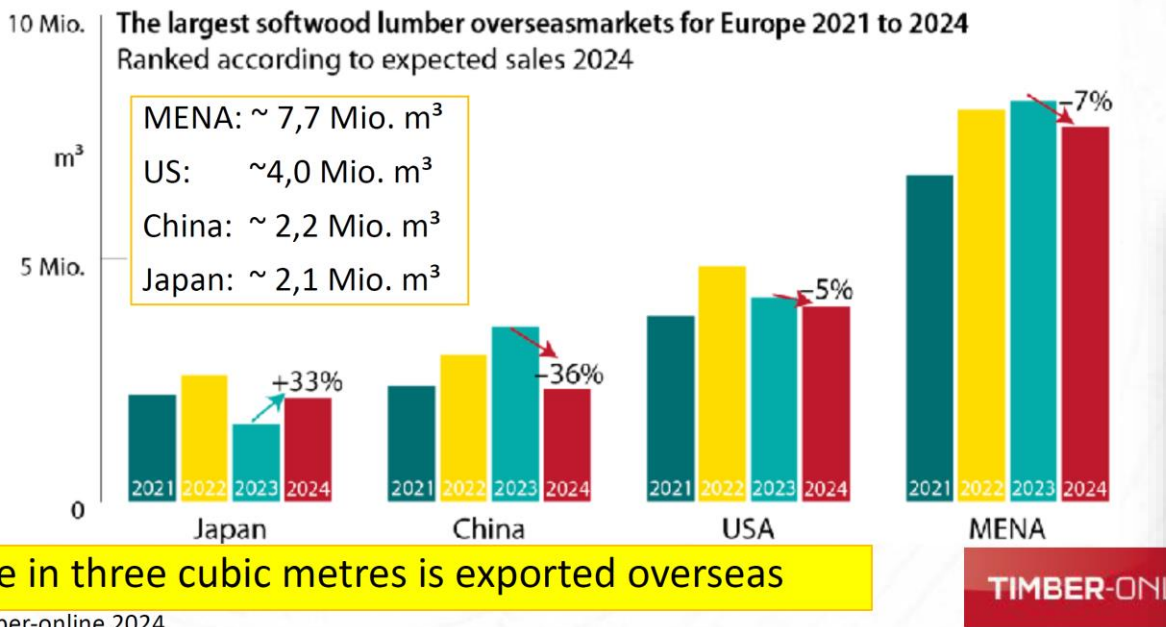
Shifting Markets for European Softwood Lumber



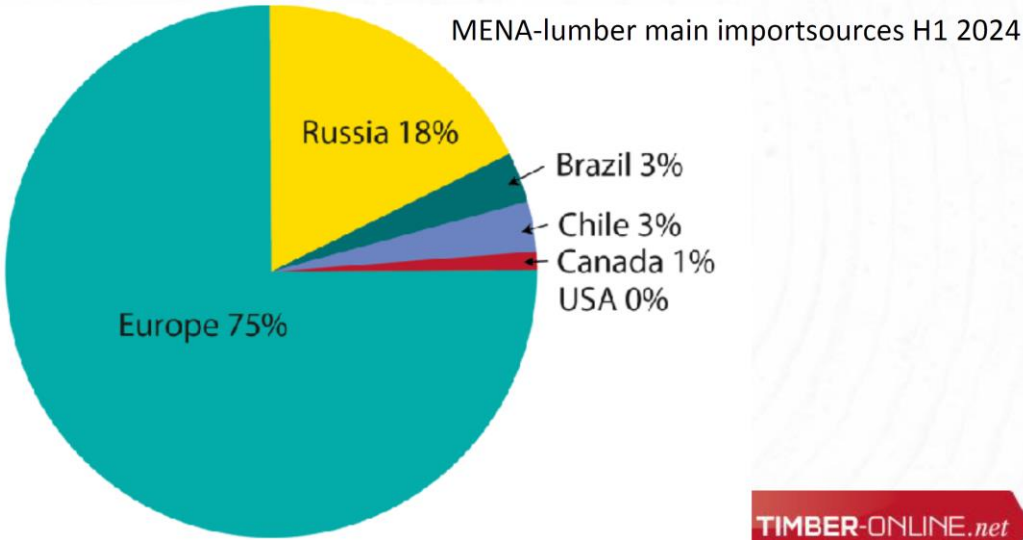
One in three cubic metres is exported overseas

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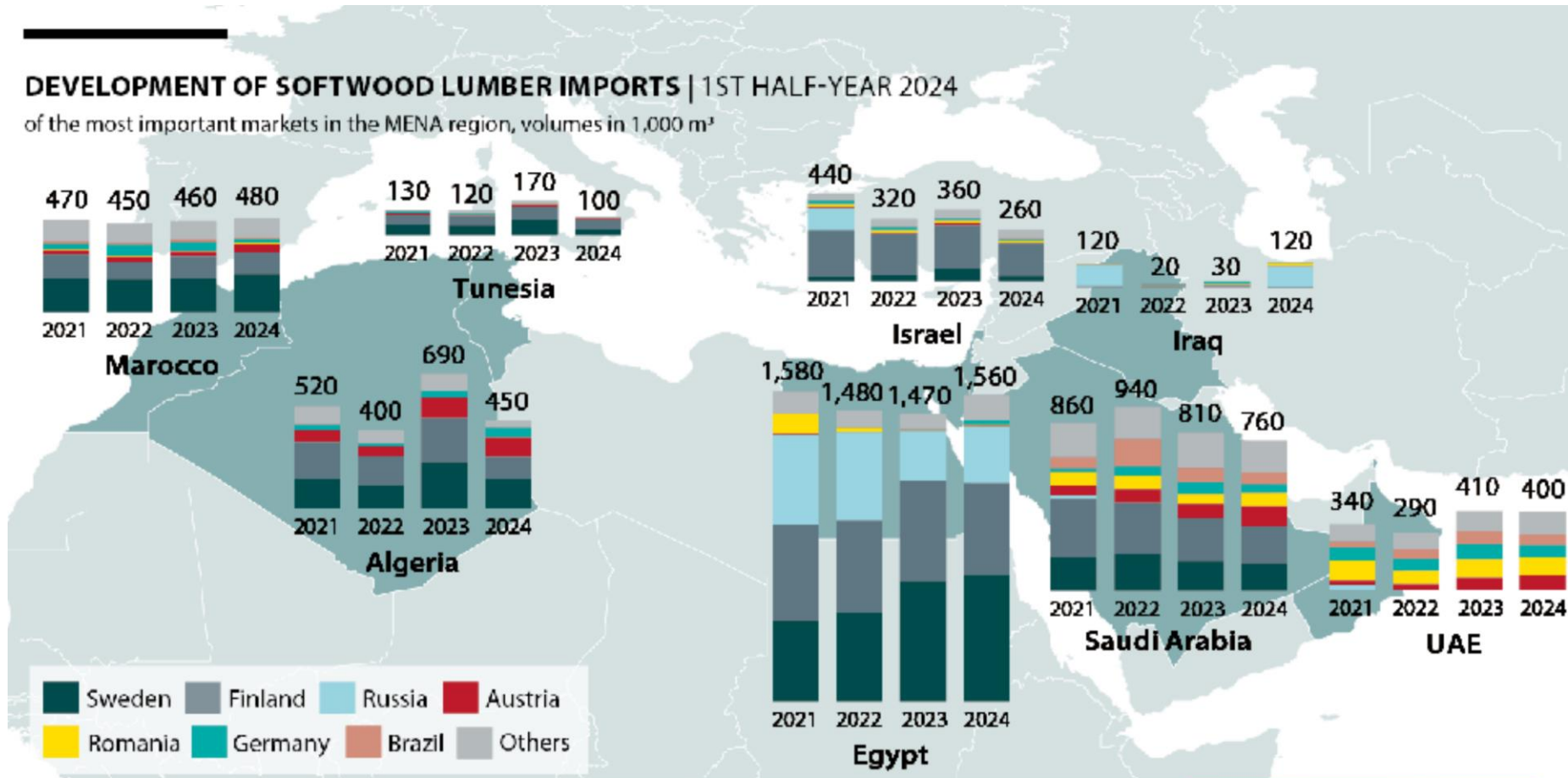
Shifting Markets for European Softwood Lumber



Mostly Europe, Some Russia, Little Else



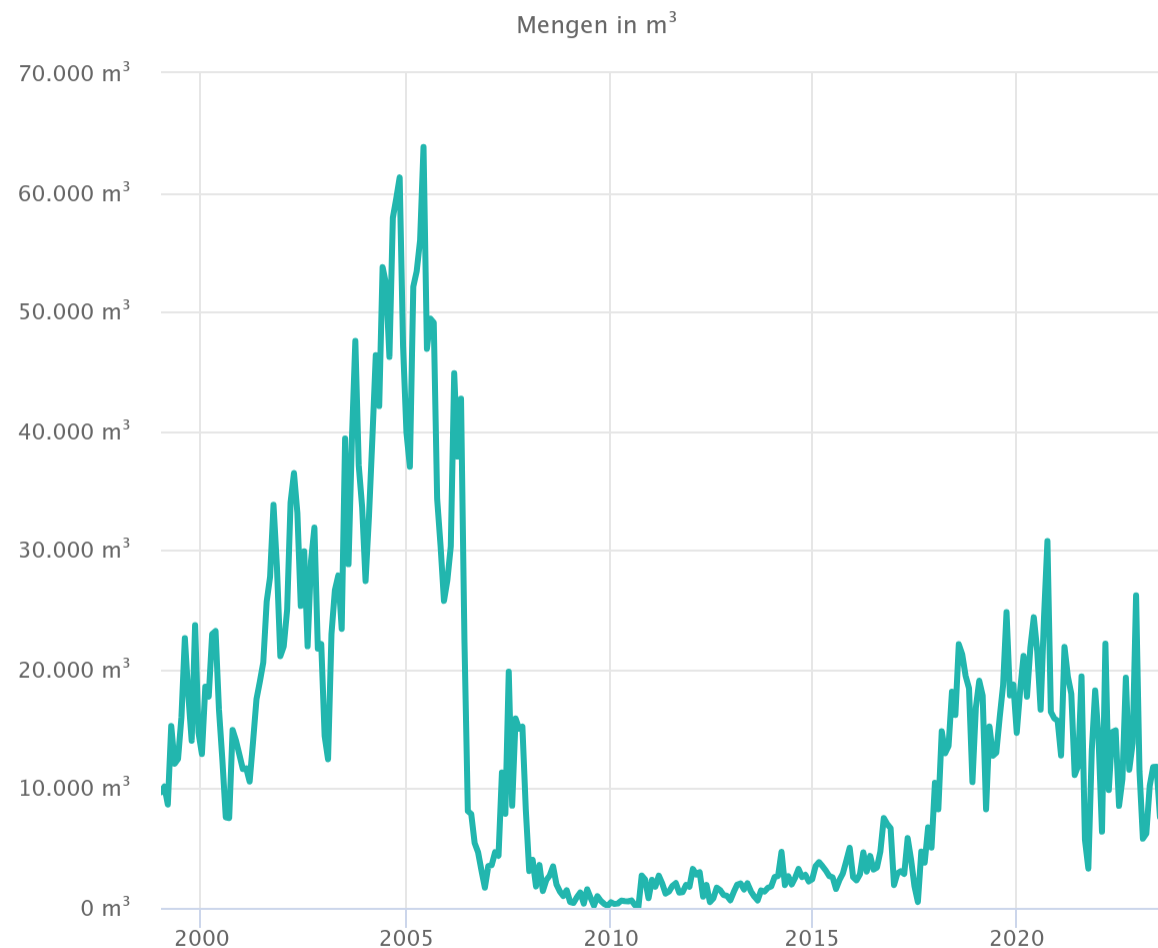
Softwood Conference 2024



EXPORTENTWICKLUNG 1999-2023

Exporte von Nadelschnittholz in die USA aus Österreich

1: Österreich Exporte Nadelschnittholz inkl. Hobelware 1999-2023



Quelle: Statistik Austria, Holzkurier 11.11.2024

— USA — USA

Quelle: Statistik Austria © Holzkurier.com

New Market Opportunities

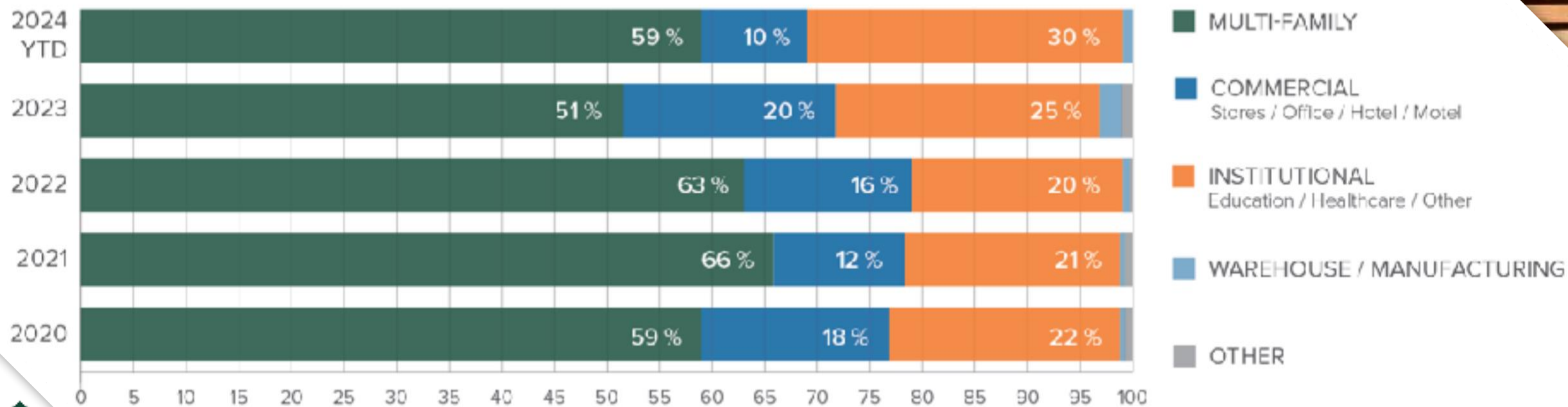
- Nearly 700 million square feet of annual conversion opportunity
- Wood utilization in the U.S. is heavily driven by the residential market segment, including remodeling and single-family new construction



Graph courtesy of WoodWorks Wood Products. Source: Dodge Analytics 2022

U.S. Softwood Lumber Outlook

Opportunities continue to be strong in several sectors.

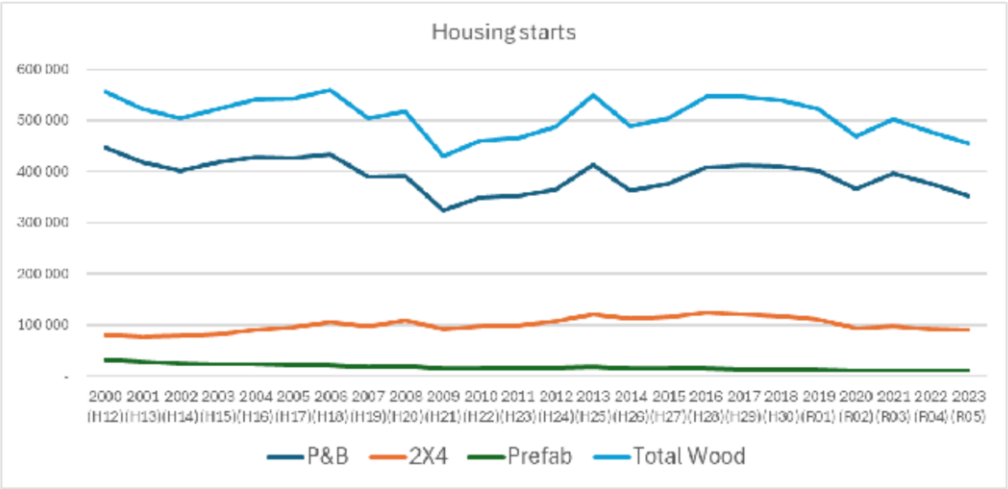


Indefinite and Permanent Mill Closures



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Wooden residential houses – Slightly downward trend



... Less m2 built



Wooden houses and m2, as index, year 2000 = 100



-20% in area per unit since 2000

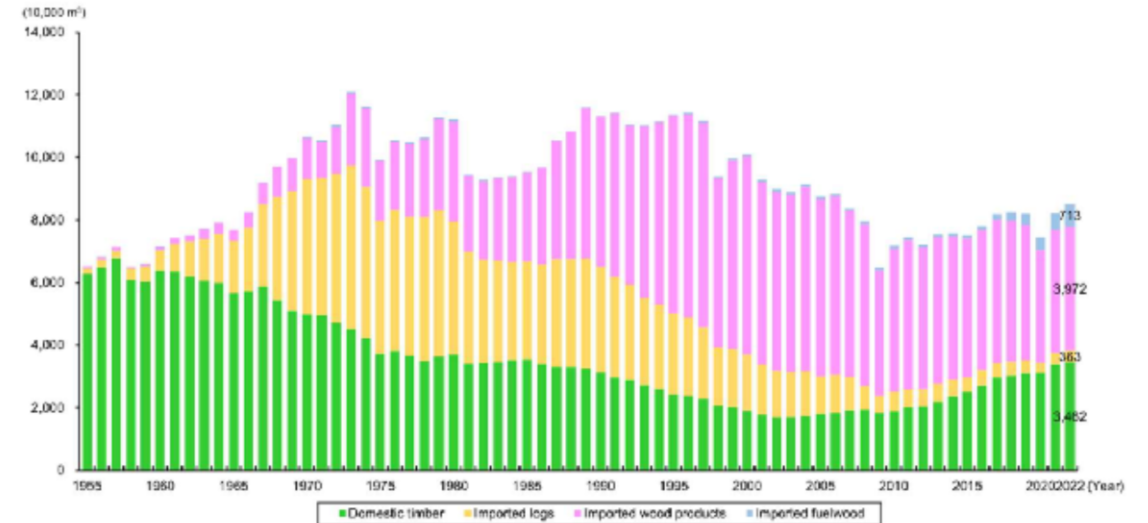
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Non residential



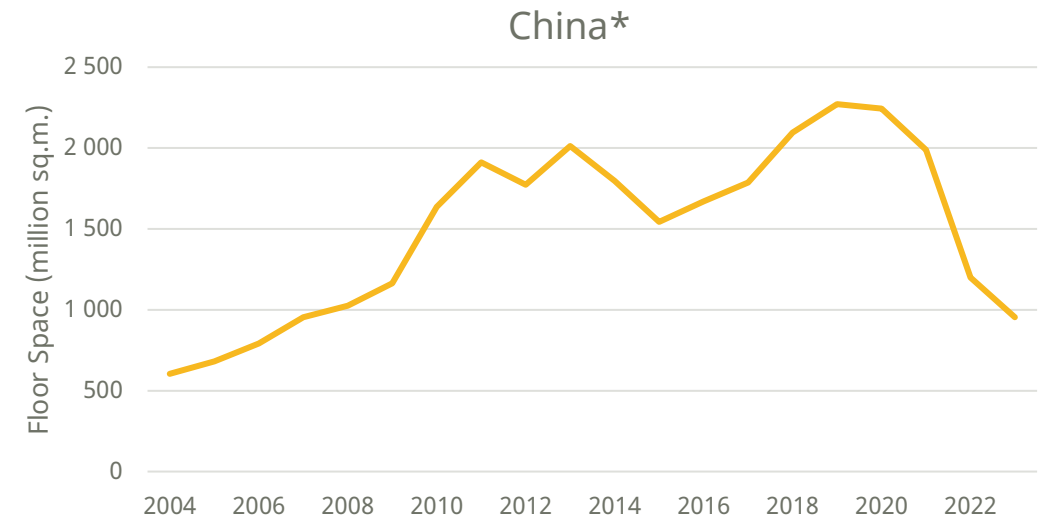
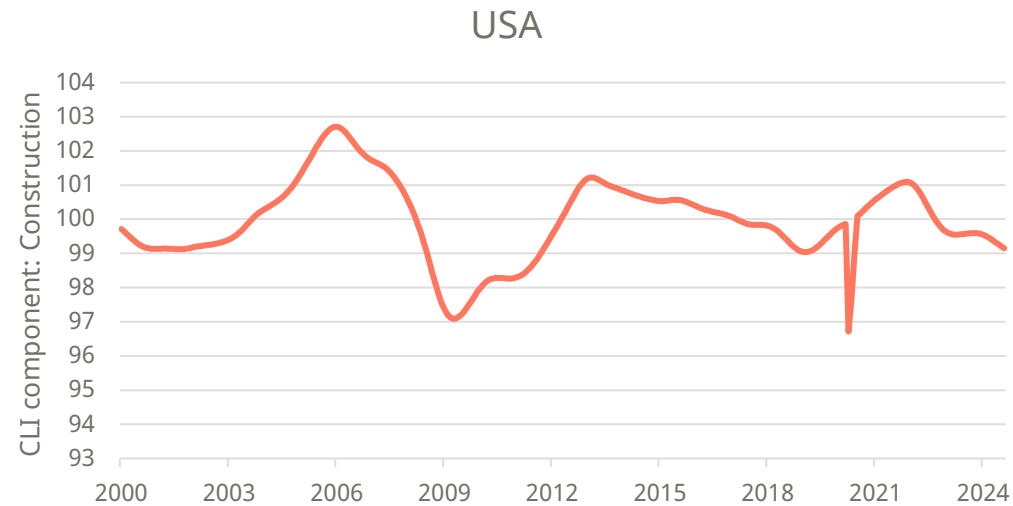
- 8% of m2 are wooden structures
- Government aim to double wood usage from 2022 to 2032
- Compensate for decrease in residential

Supply of Softwood

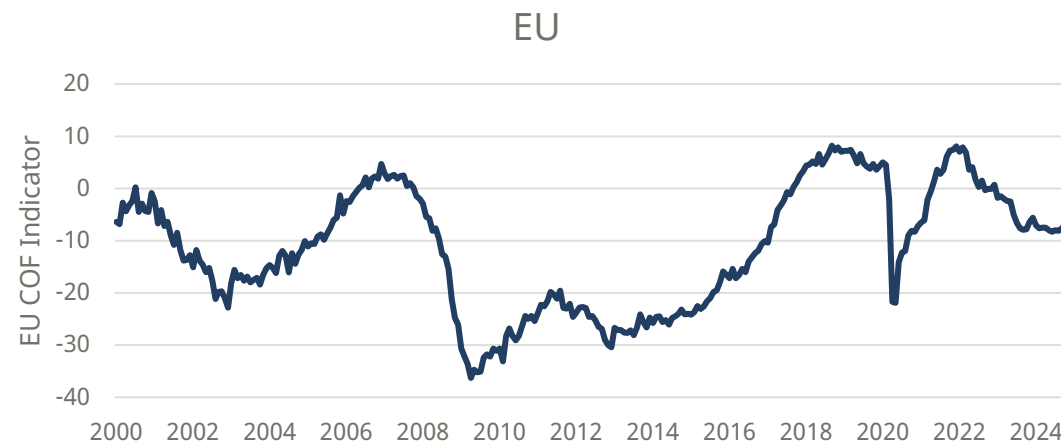


Source: Forestry Agency "Wood Supply and Demand Chart"
Volume calculate in log-equivalents

Challenges for the global construction industry



*Floor space of buildings started for real estate development (million sq.m.)

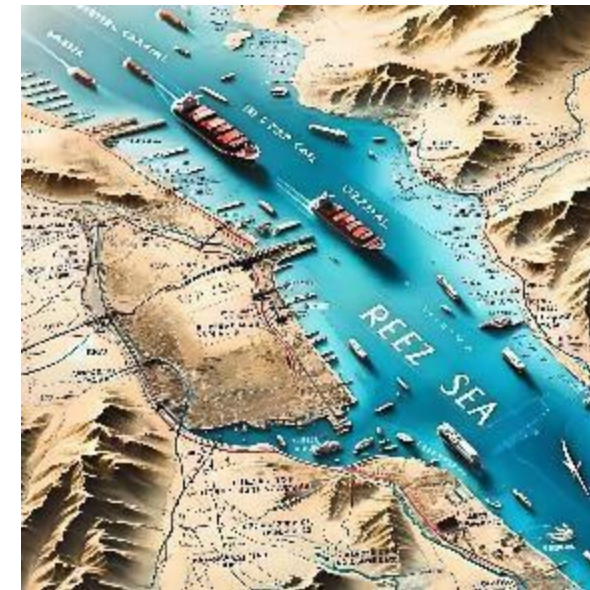




Wars
Logistics
Politics
Climate



EUDR: Could disrupt global trade in 2026!



Red Sea: US\$200 Billion in global shipments have been impacted



Panama Canal: Drought! from 36 vessels to 24 to 18/day before increasing.

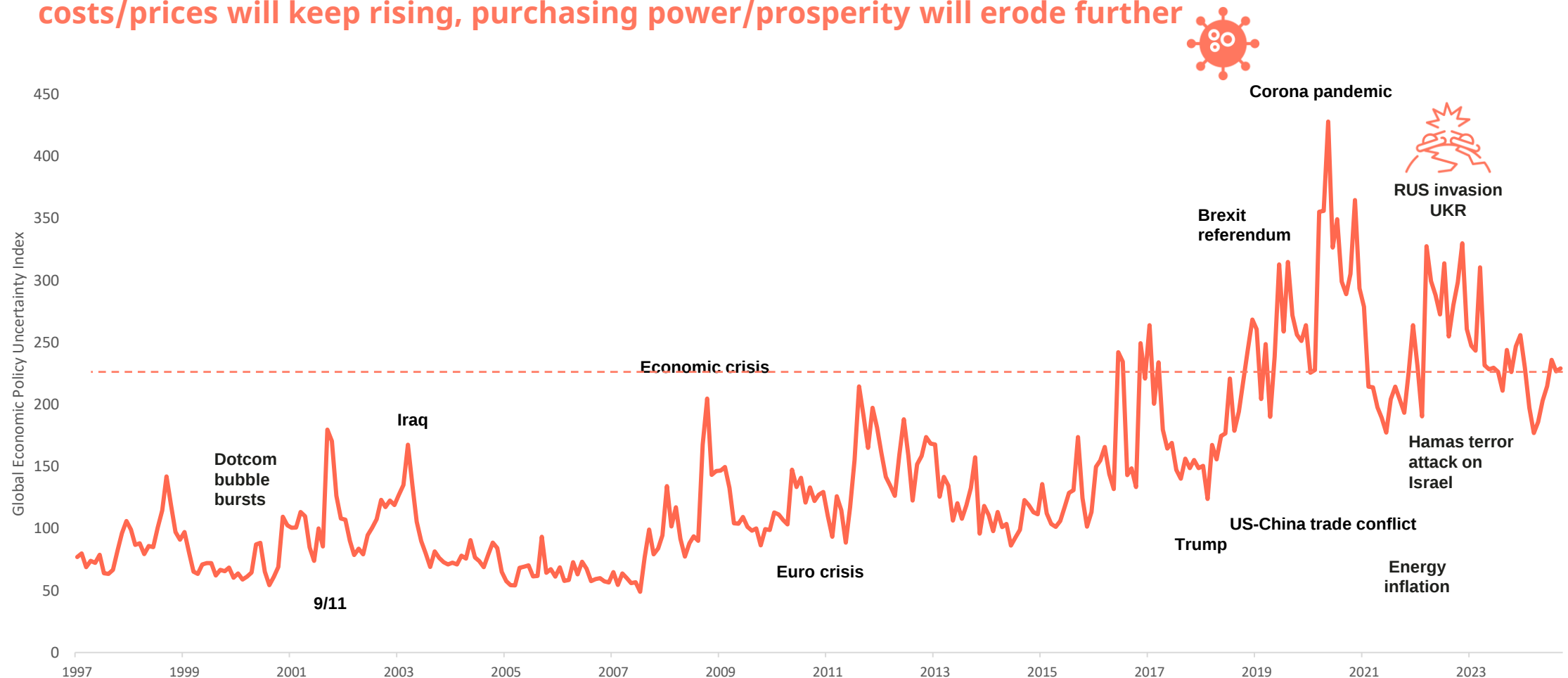


Climate Change:



Global uncertainty remains at a high level

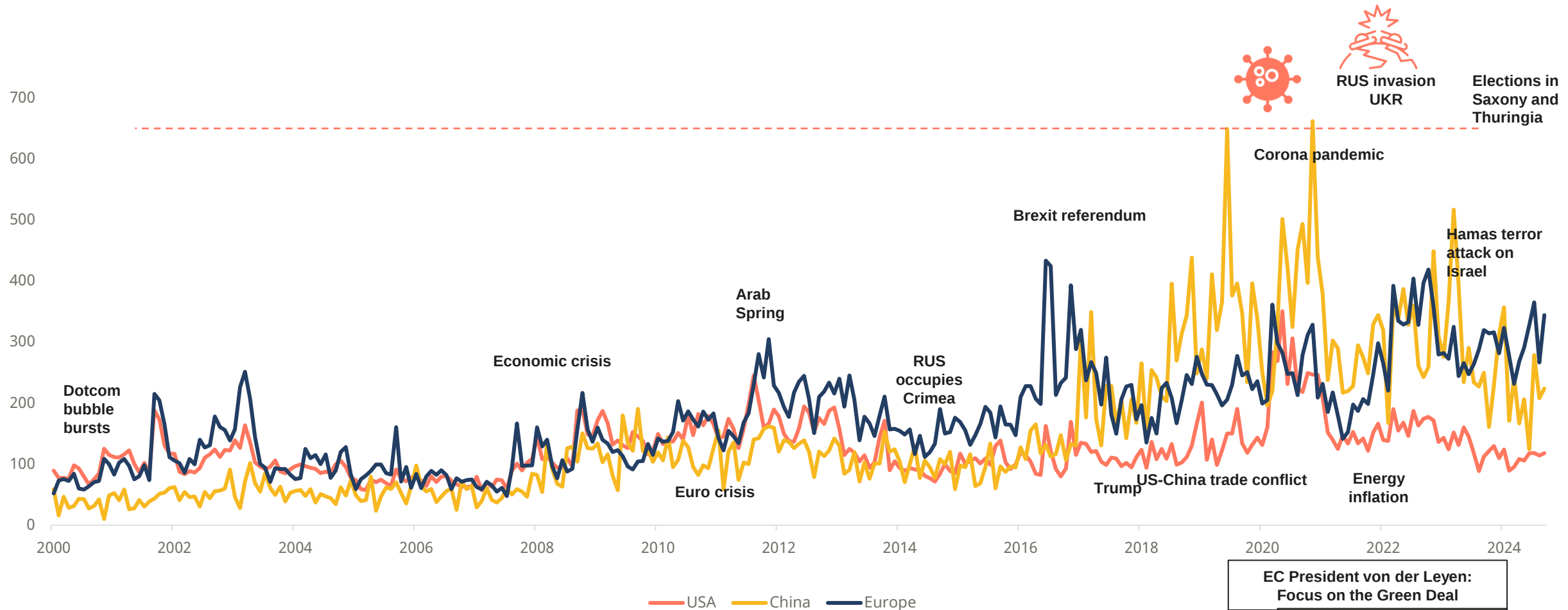
Armed conflicts, international trade disputes and increasing debt weigh on global sentiment -> costs/prices will keep rising, purchasing power/prosperity will erode further



↑ Uncertainty = costs ↑ and growth ↓
↑ Trust = costs ↓ and growth ↑

Economic policy uncertainty differs between regions

Policy uncertainty puts many pressures on society, companies and decision-makers



↑ Uncertainty = costs ↑ and growth ↓

↑ Trust = costs ↓ and growth ↑

EC President von der Leyen:
Focus on the Green Deal

US President Biden:
Bidenomics = "place-based
industrial strategy"

CN President Xi :
Made in China 2025

Global hardwood exports

export value and share of hardwood exports, 2022, in USD

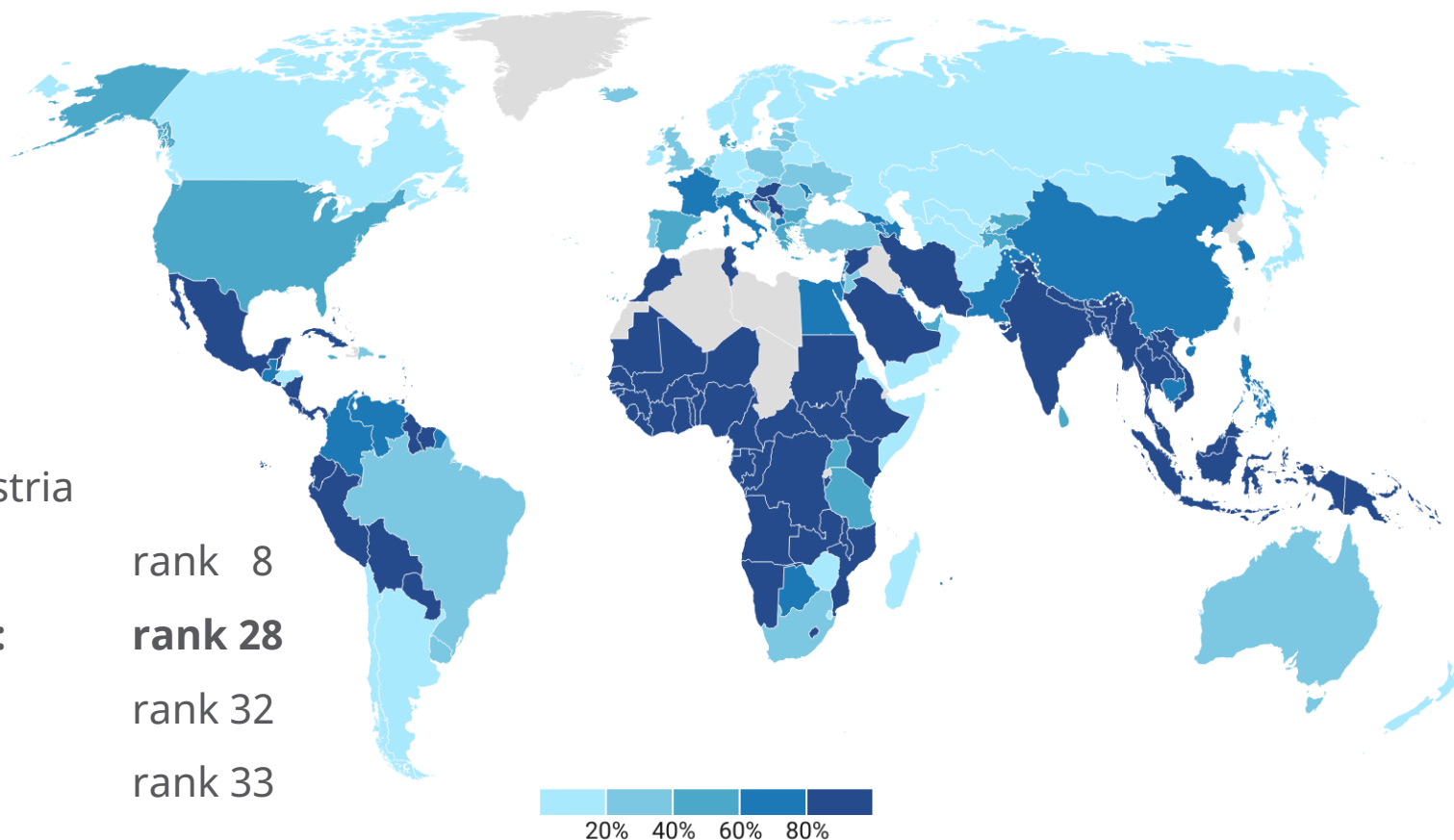
Top hardwood exporting countries
in Mio. USD



Global ranking for Austria

- Wood exports: rank 8
- Hardwood exports: rank 28**
- Total exports: rank 32
- GDP: rank 33

Share of hardwood exports to all wood exports



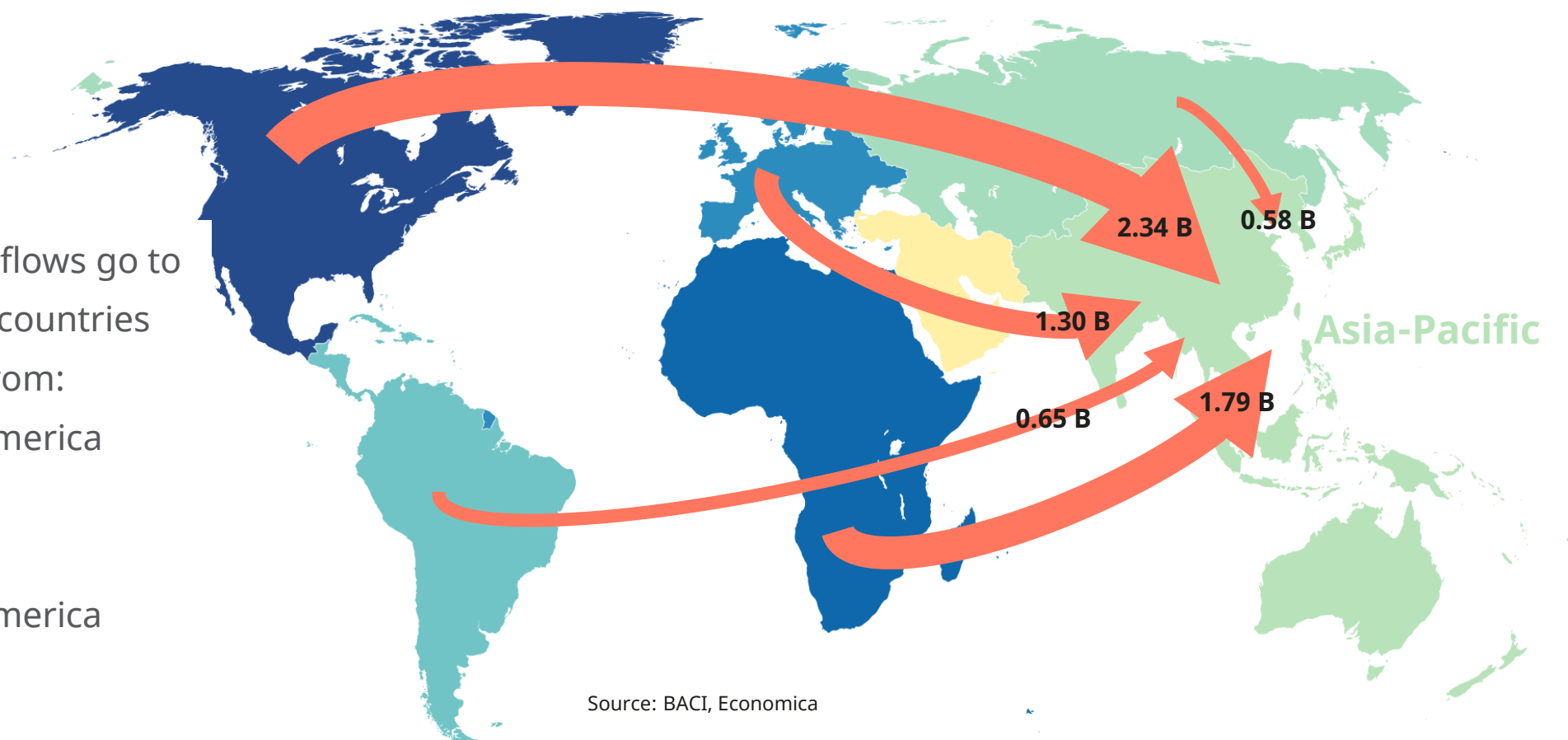
Hardwood trade flows between regions

in USD, 2022

The top 5 largest trade flows between regions are all directed to the Asia-Pacific region, and in this region mainly to China.

Top 5 trade flows go to Asia-Pacific countries and come from:

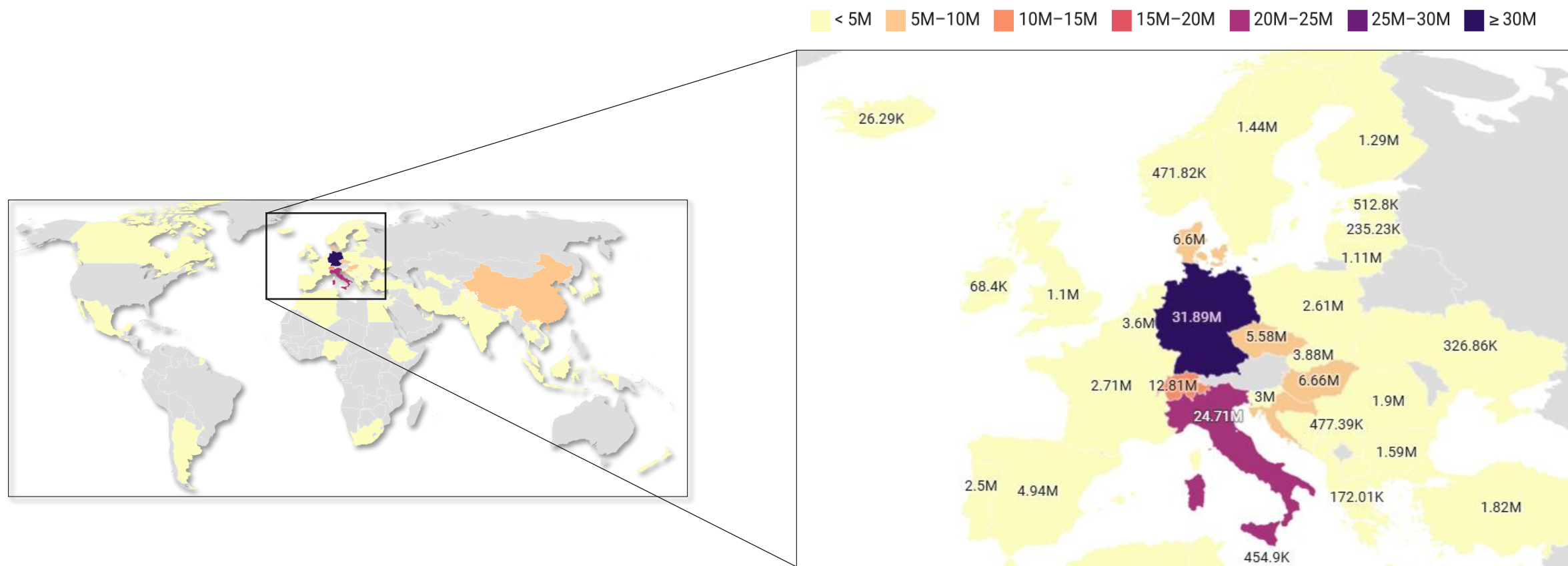
1. North America
2. Africa
3. Europe
4. South America
5. FSU



Source: BACI, Economica

Austrian hardwood exports

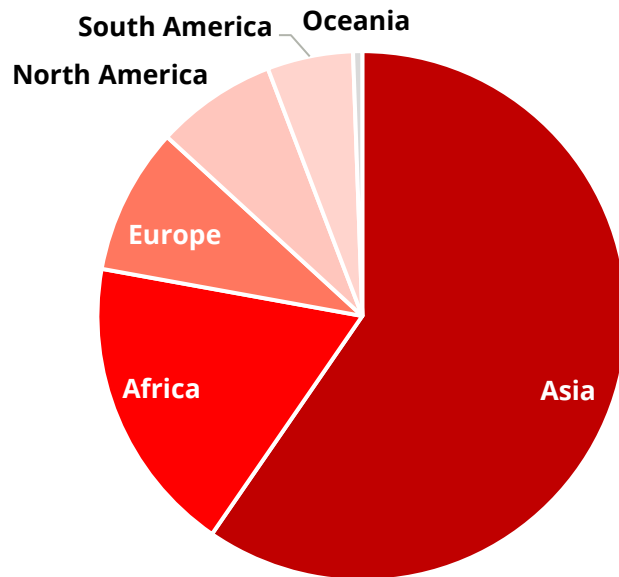
export values in USD, 2022



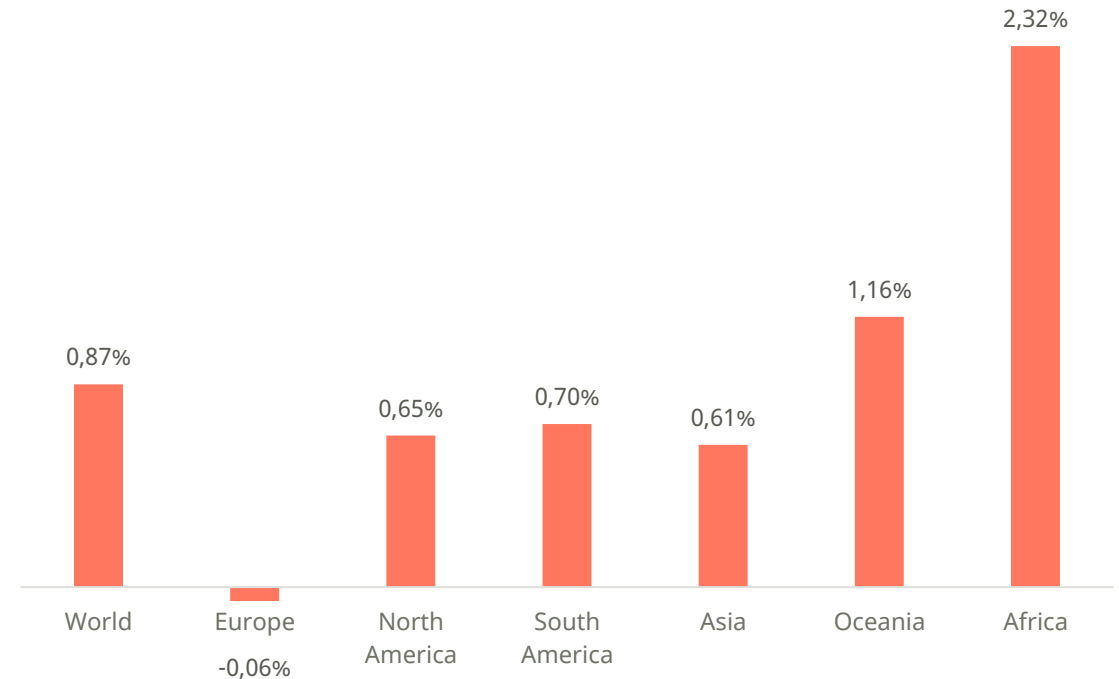
Source: BACI, Economica

The world is our market – 8,000,000,000 potential consumers

Total world population in 2024: 8,305,075,134



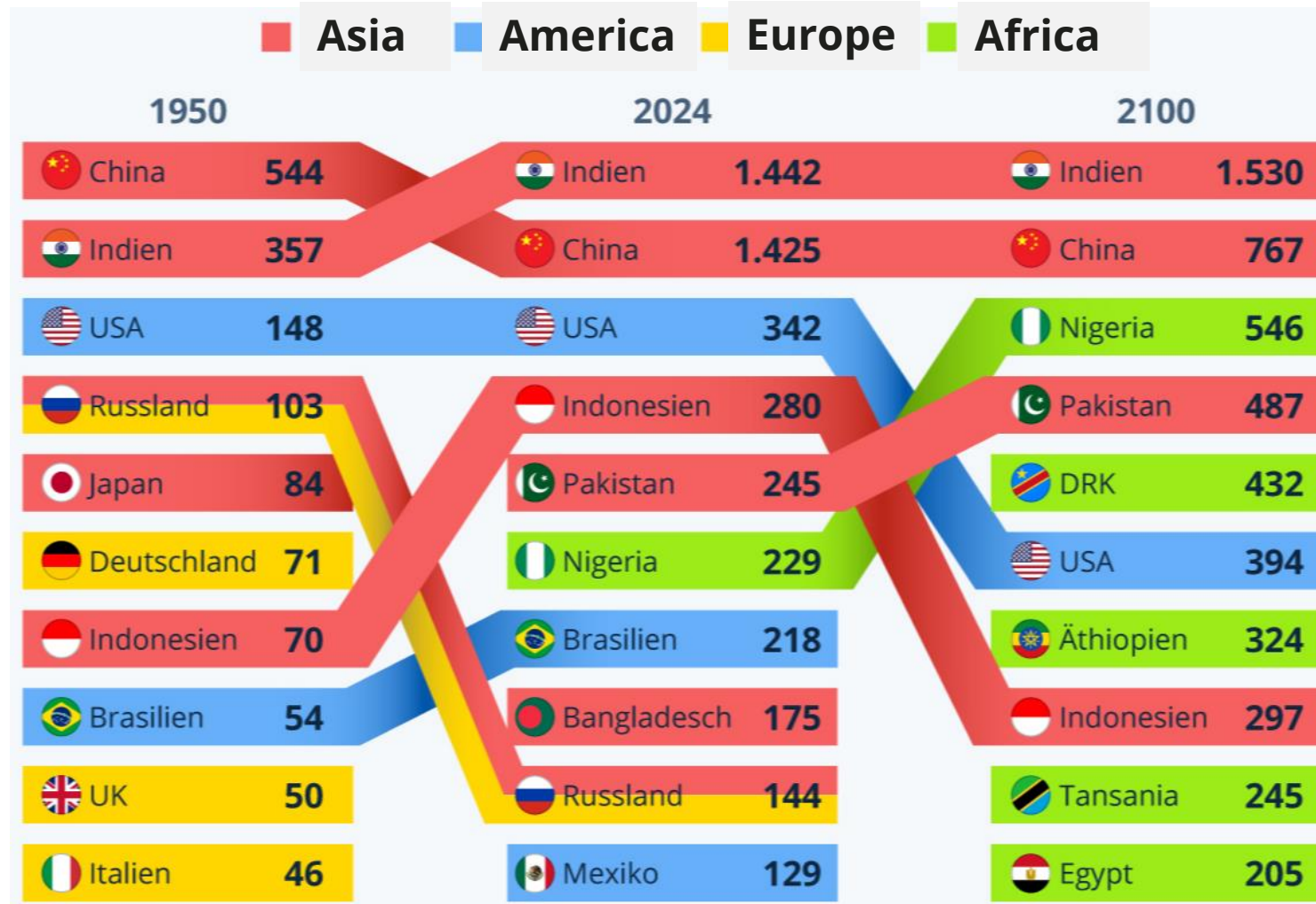
Population growth rates 2023



The markets of tomorrow – people will always need wood

Continental shift -

Estimated/projected population size on July 1 of the respective year (in millions)*



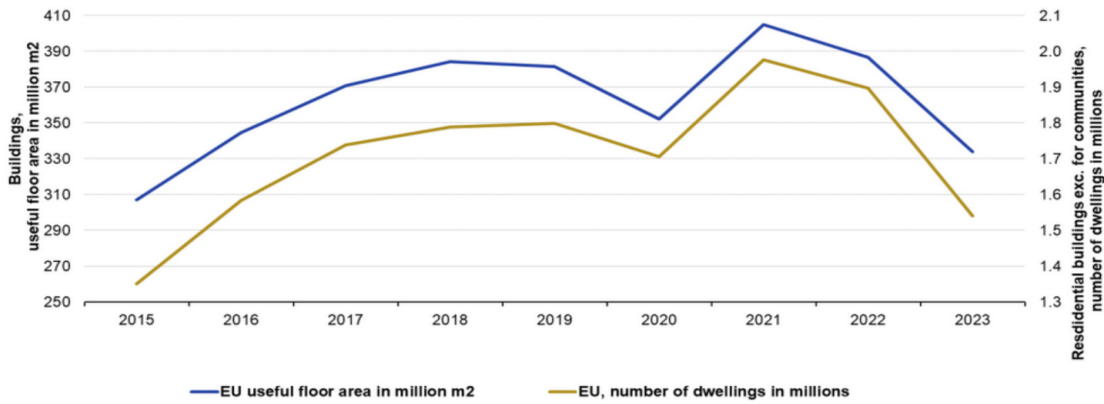
Note: * middle variant; the current national borders apply

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In 2023 building permits have fallen remarkably



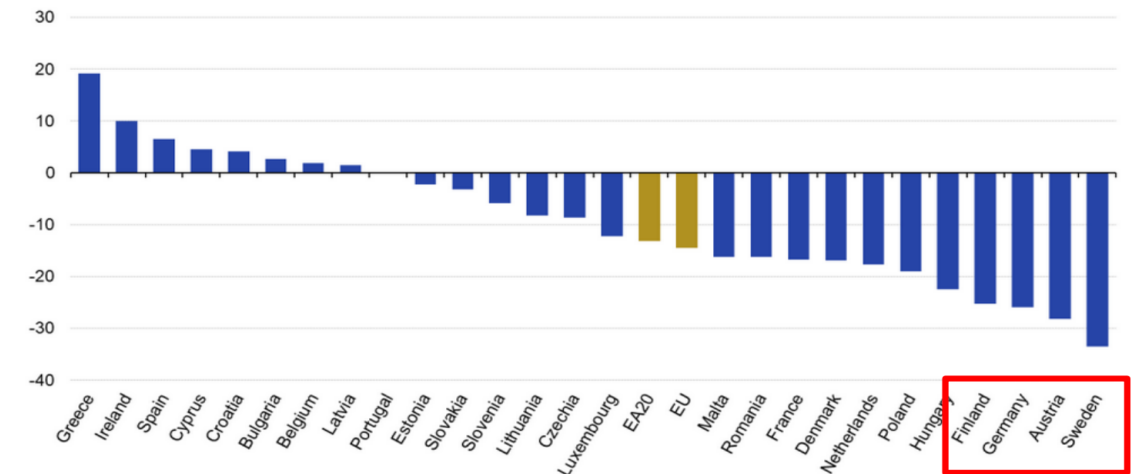
Building permits in the EU, 2015 - 2023, absolute values, annual data, unadjusted



Source: Eurostat (online data code: sts_cobp_a)

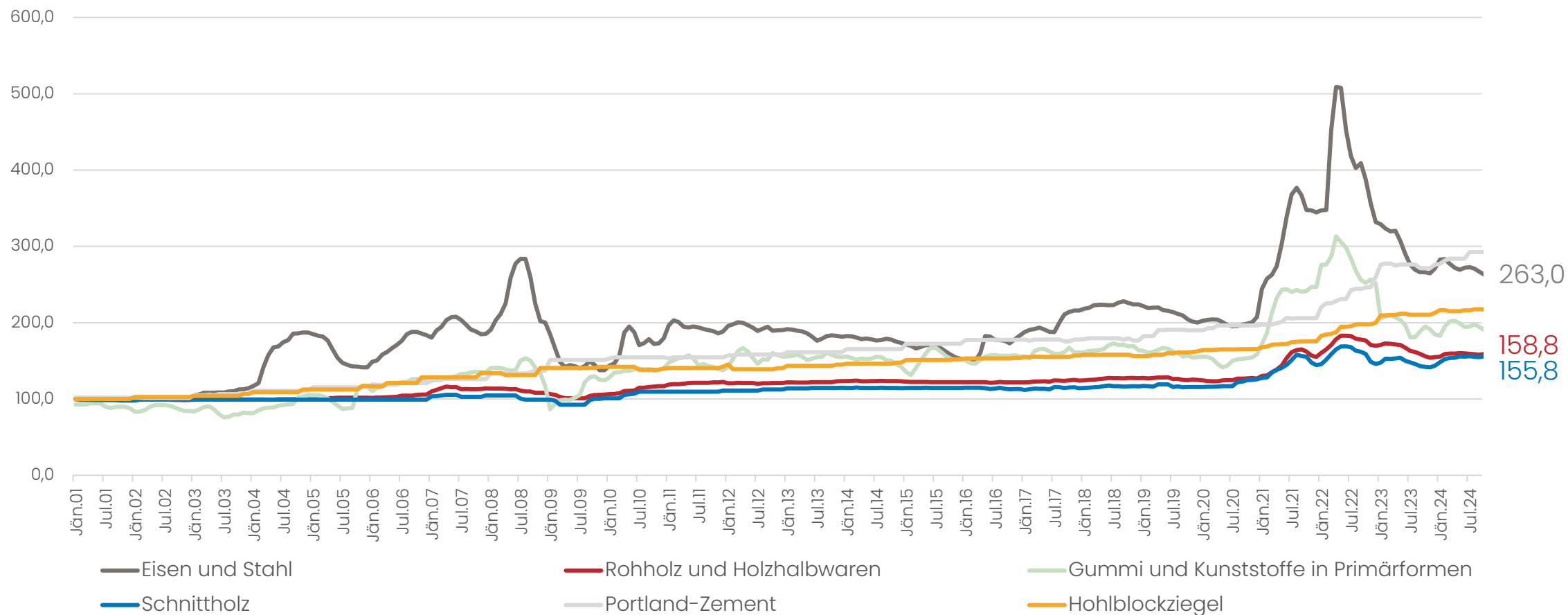
eurostat

Building permits in terms of useful floor area
rate of change between 2022 and 2023 (%)



-15% in 2023 in terms of floor area, -20% in terms of number of dwellings. In Nordic and German speaking countries especially difficult situation.

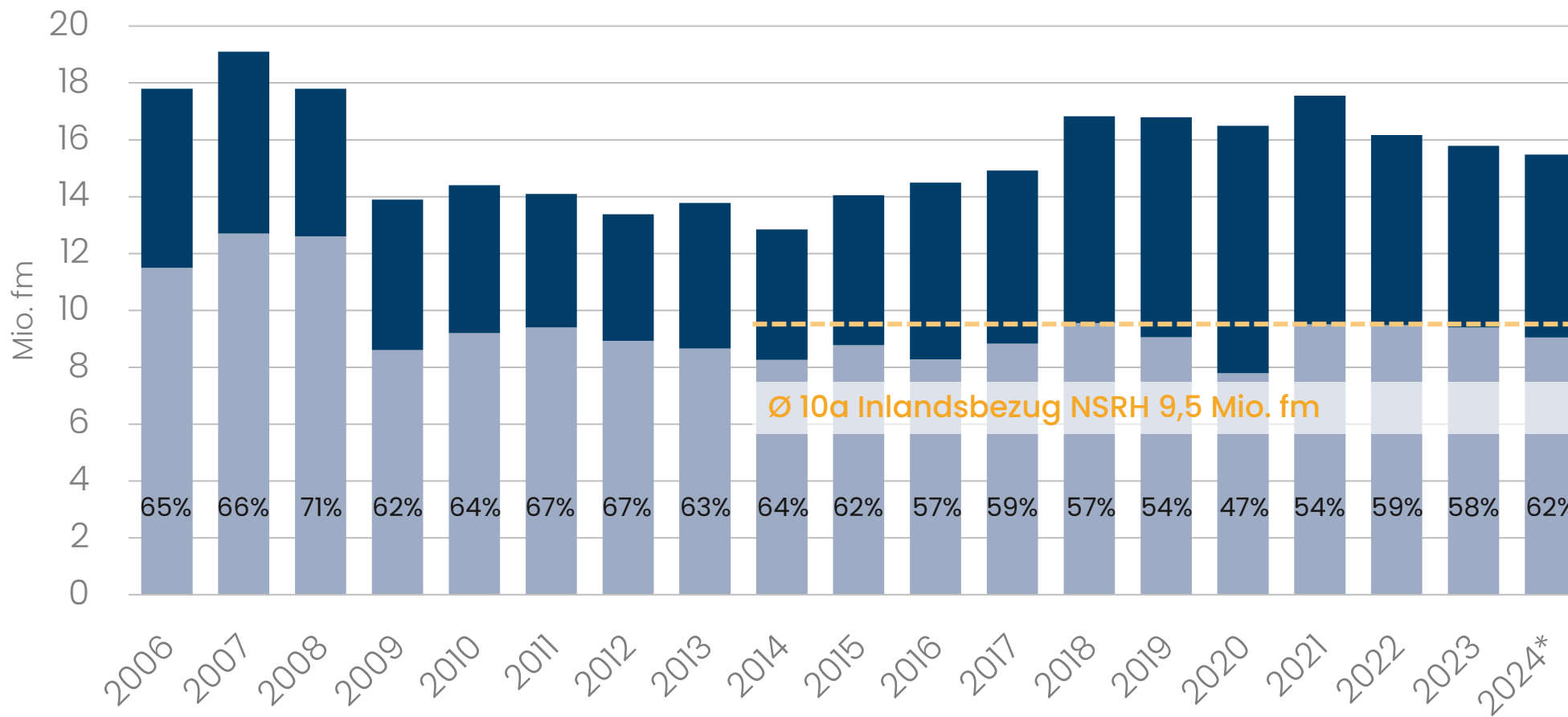
Entwicklung der Großhandelspreisindizes bis Okt. 2024 (100 = 2000)



EOS-Ausblick für 2024/frühes 2025

- **Kurzfristig** wird die Situation für die europäische Holzindustrie **schwierig** bleiben. Es gibt jedoch **Anzeichen dafür, dass die Talsohle des Rückgangs auf den Baumärkten erreicht ist**, sofern es nicht zu einem weiteren großen internationalen Schock kommt.
- Es ist nicht zu erwarten, dass die **Fixkosten** und sonstigen Kosten sinken werden. Mehr **betriebliche Effizienz und Investitionen in Automatisierung** werden notwendig sein, um die hohen Kosten zu kompensieren.
- **Fragezeichen** hinsichtlich der Gesetzgebung und des internationalen Kontextes: Umsetzung der EUDR: Durchführbarkeit und Kosten? Ukraine-Russland-Konflikt? Chinesische Baumärkte? Politische Konflikte in ME? US-Politik?
- **Holz als Baumaterial gewinnt weiter an Marktanteilen**-Verbraucher, Bauherren und Entscheidungsträger schätzen Holz: **Wir müssen** auf nationaler und internationaler Ebene **weiterarbeiten**, um Marktanteile zu sichern. Holz hat **gegenüber anderen Materialien an Wettbewerbsfähigkeit gewonnen**.
- ABER die kontinuierliche **Verfügbarkeit von Rohstoffen** ist für die Industrie nach wie vor von zentraler Bedeutung

Sägerundholz-Versorgung: Basis der Wertschöpfungskette Holz ist Rohstoff aus ÖSTERREICH



2023

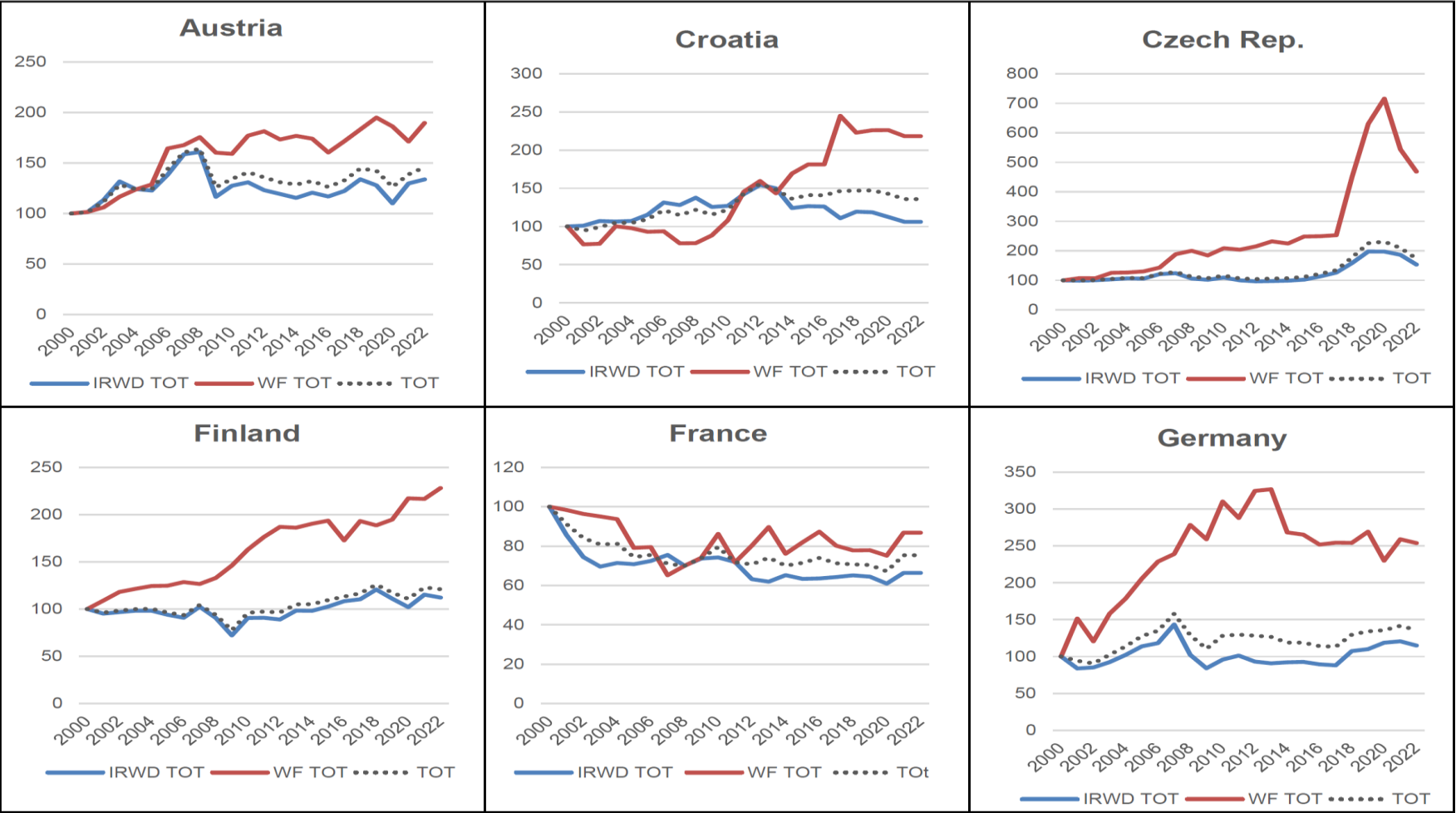
Import
6,4 Mio. fm

Inland
abzgl. Export
9,4 Mio. fm

2024*

Import
6,4 Mio. fm

Inland
abzgl. Export
9,1 Mio. fm



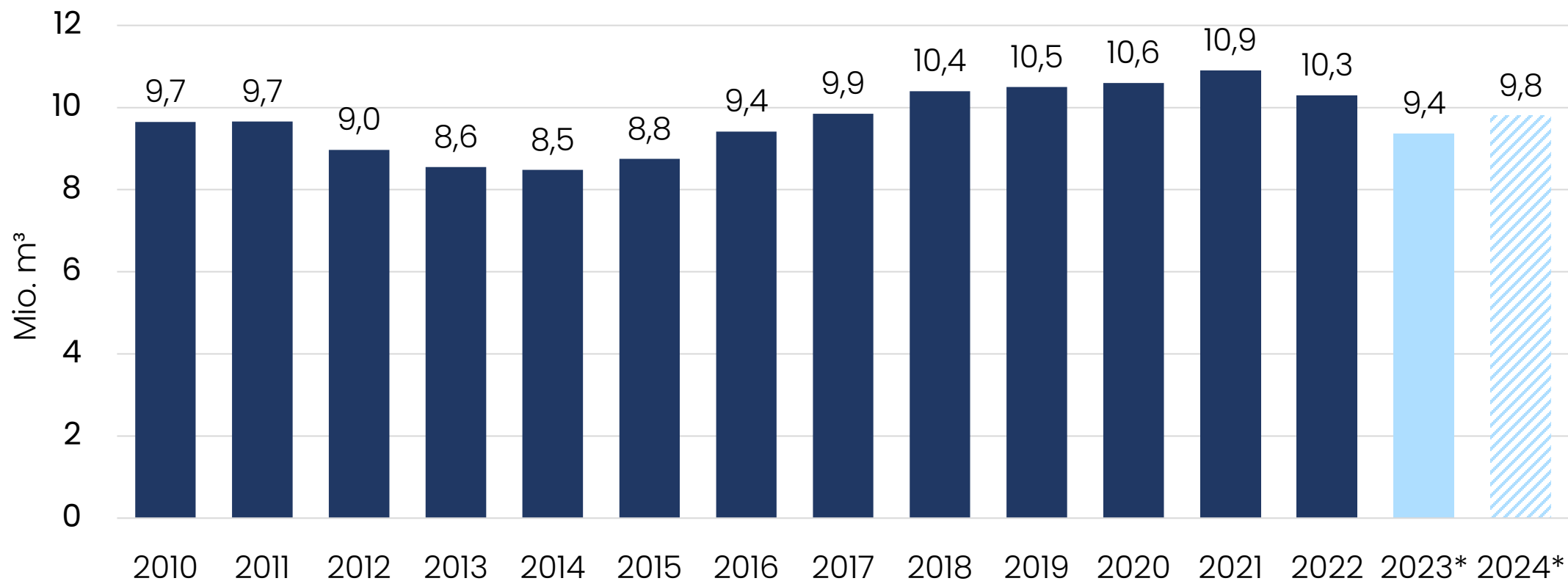
removals of roundwood (TOT), industrial roundwood (IRWD) and fuelwood (FW) (2000 =100)

Quelle: Präsentation Pettenella ISC 2024

LAUB- UND NADELSCHNITTHOLZPRODUKTION IN ÖSTERREICH

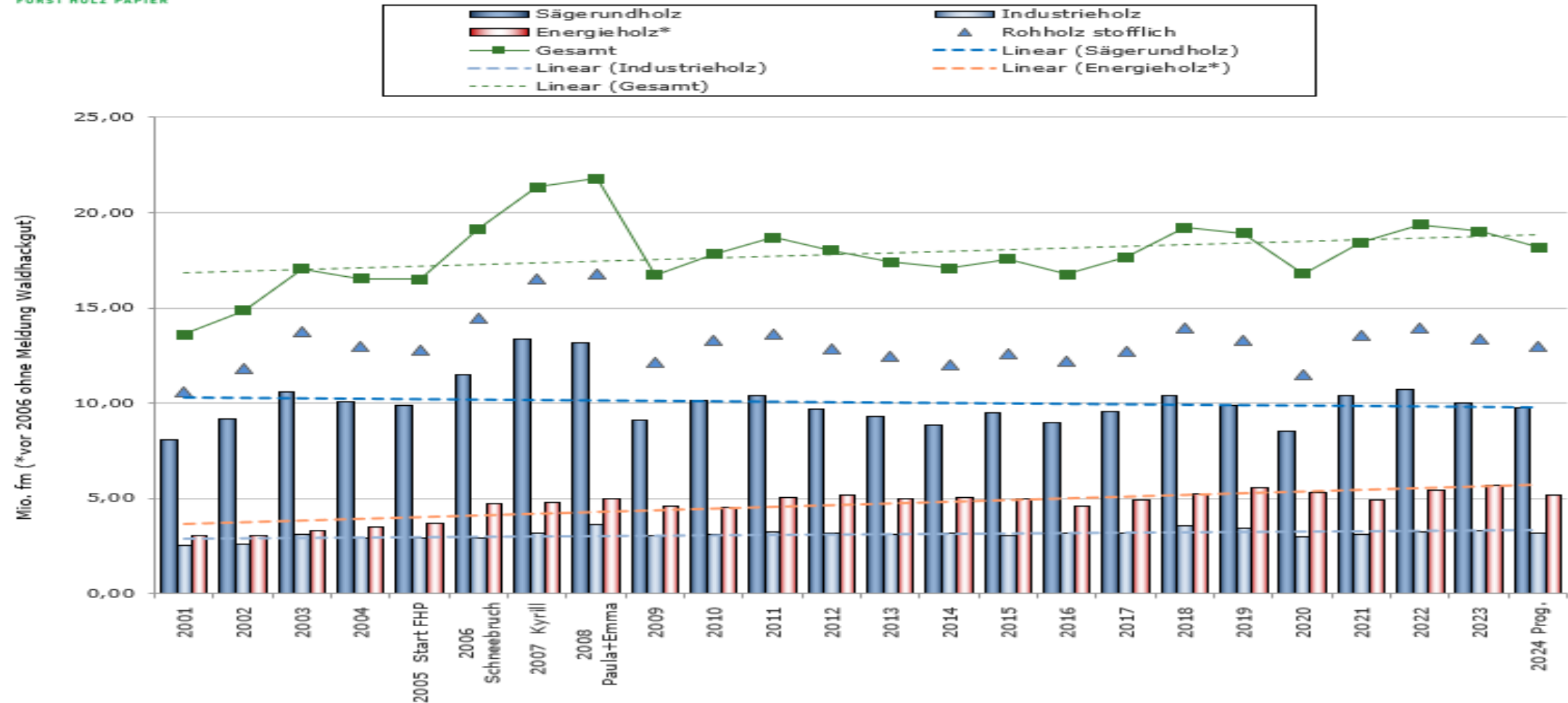
Produktion weiter dem geringeren Bedarf angepasst

+2 Mio. m³ Schnittholzproduktion Kapazität



FHP – Datenservice & Holzbilanz

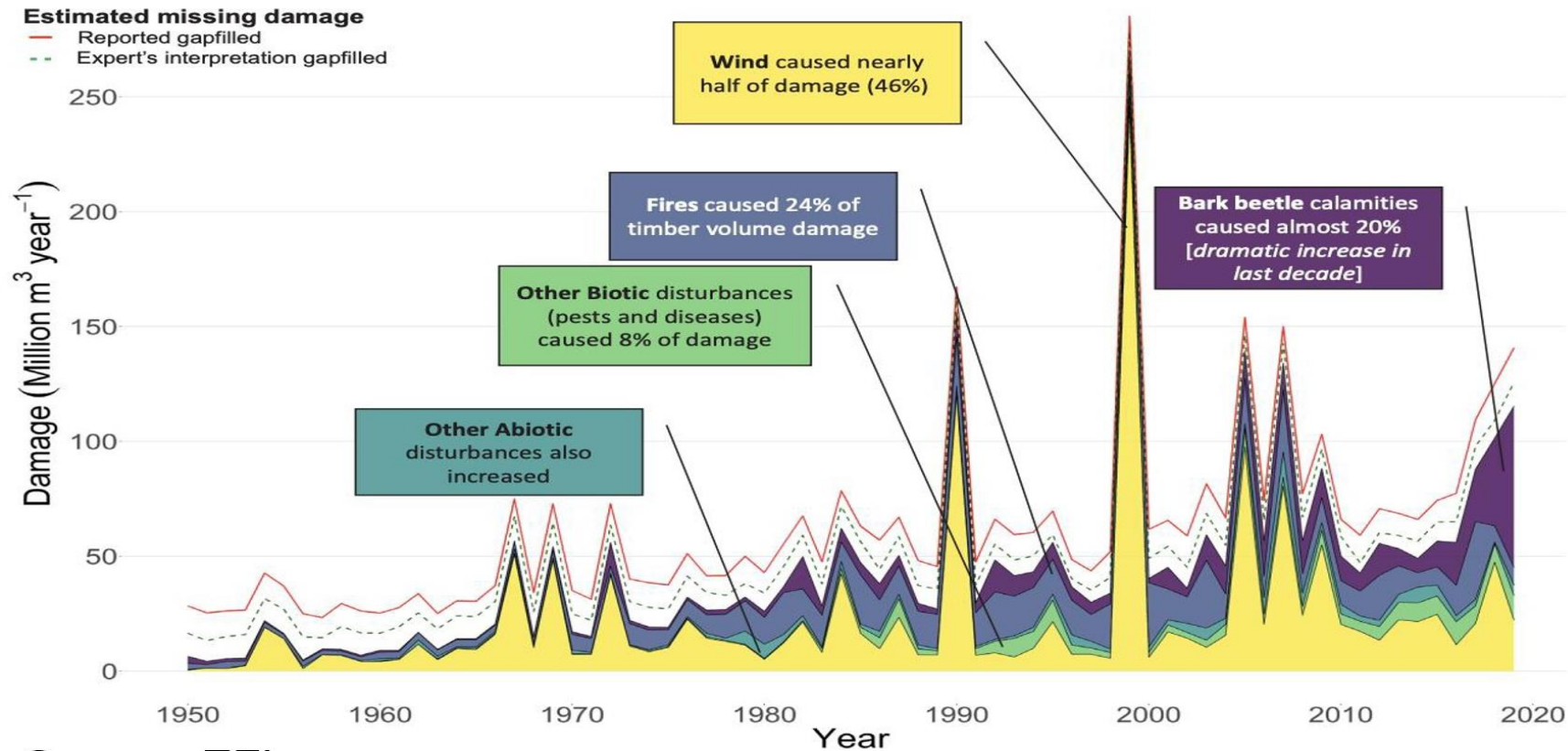
Holzeinschlag - Sortimente



Quelle: FHP-Holzbilanz (10/2024)

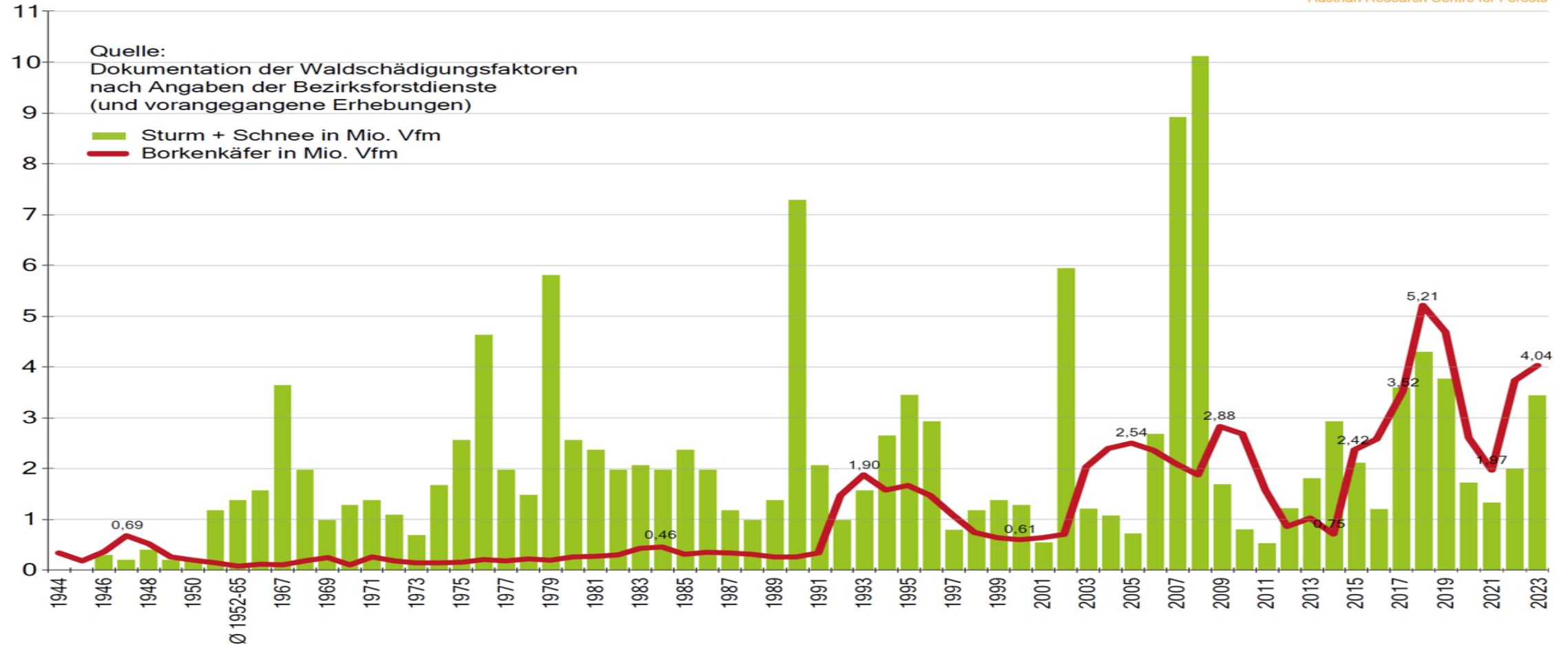
Grafik: Asada

Increased frequency and intensity of damages to European forests



Source: EFI

Schadholzmengen durch Sturm, Schnee und Borkenkäferbefall



Commitments (including in the forestry sector)

Climate commitments

- Carbon neutral(ity)
- Zero carbon
- Climate neutral
- Zero emissions
- GHG neutral(ity)
- Climate positive
- Carbon negative
- 1.5°C target

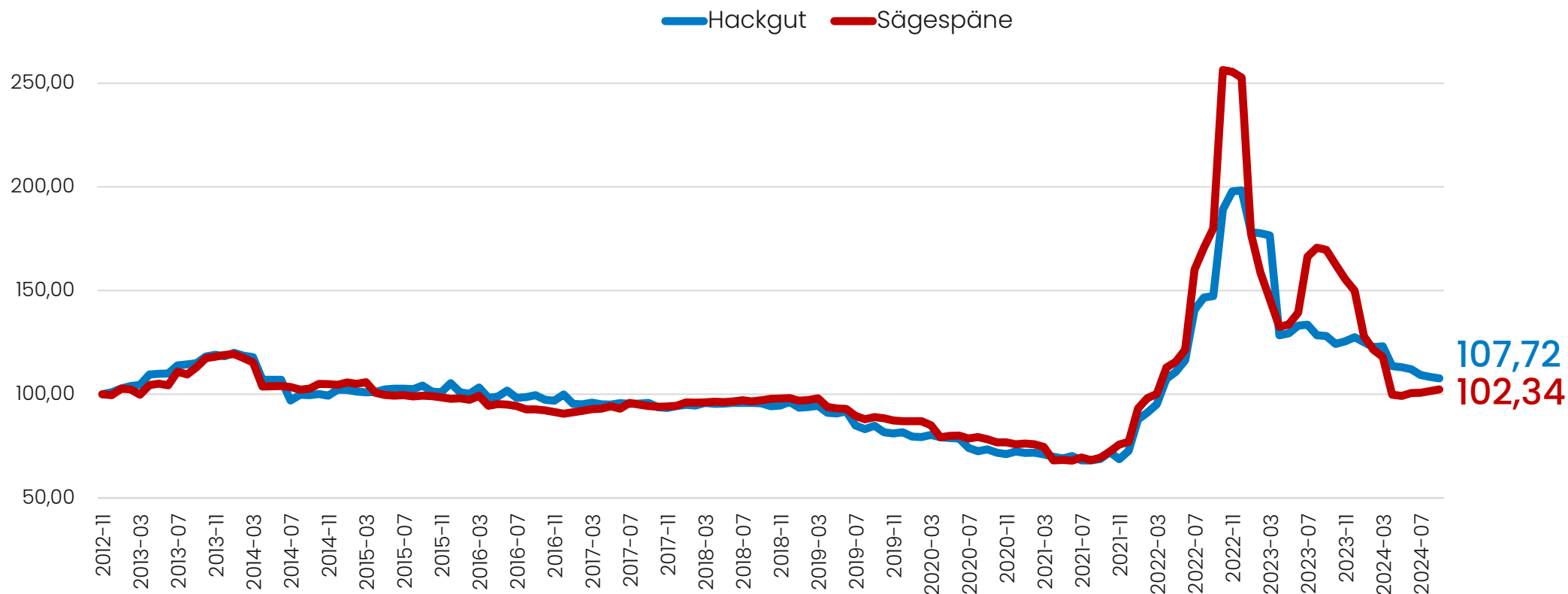
Biodiversity commitments

- Nature positive
- Biodiversity neutral(ity)
- Nature neutral(ity)

Global commitments

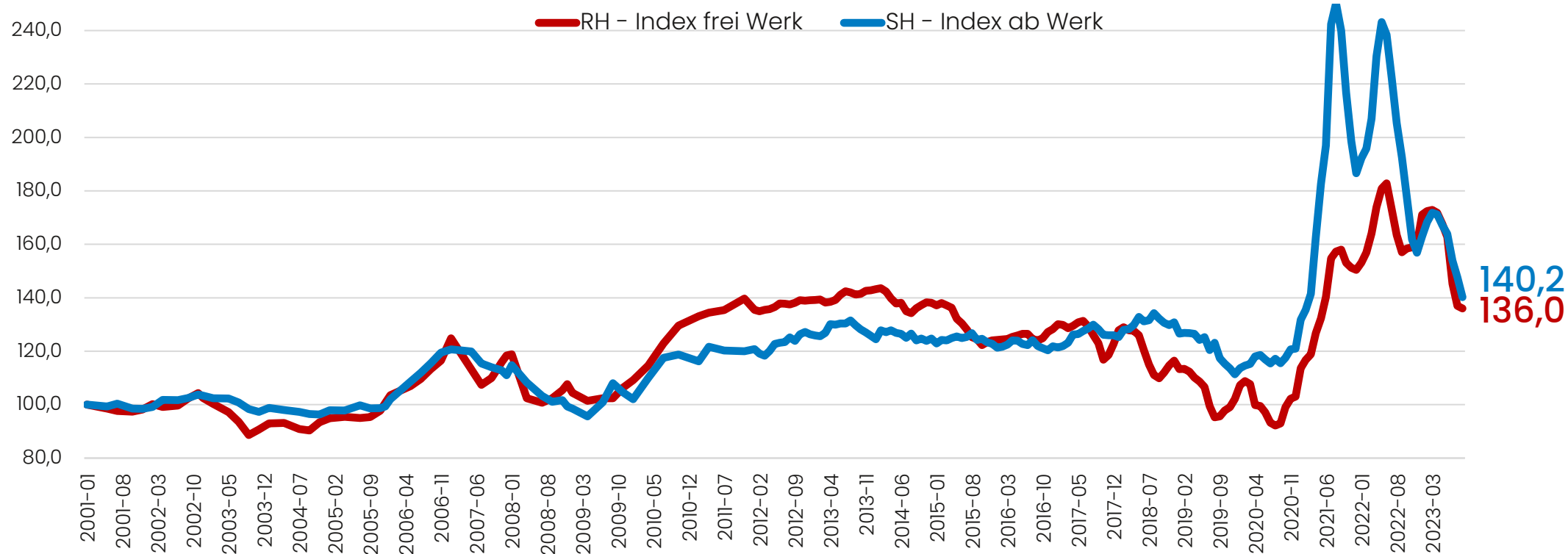
- Net zero
- Net negative
- Science-Based Targets Network (SBTN) Compliance

Entwicklung Preisindex Hackgut / Sägespäne (11/2012 – 09/2024)

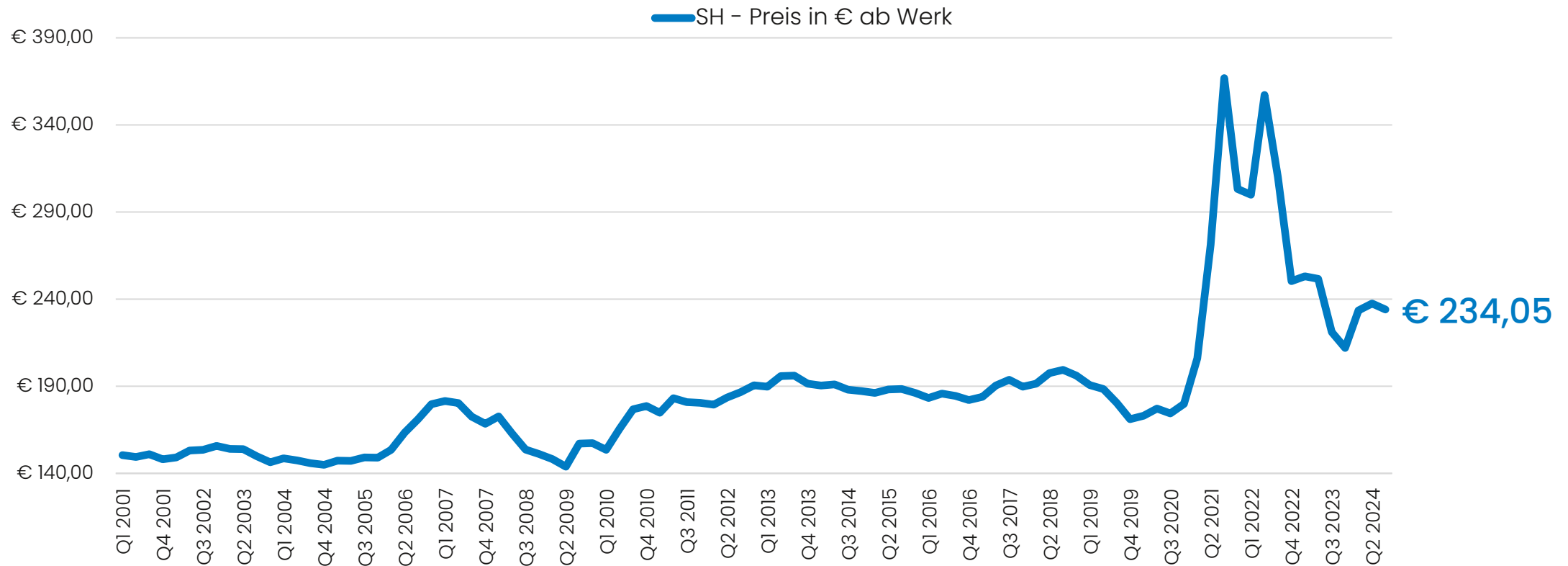


Entwicklung Preisindex

Schnittholz / Rundholz (01/2001 – 09/2023) (100 = Jän. 2001)

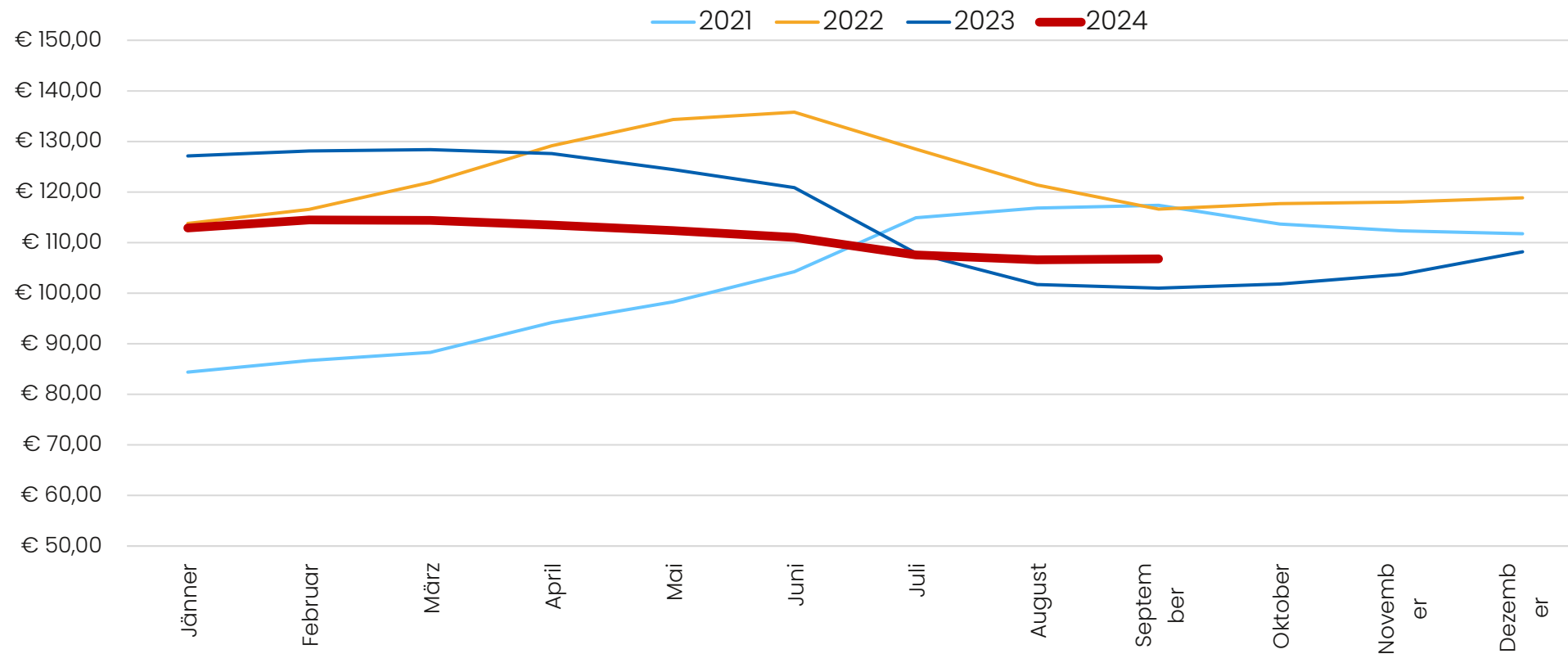


Entwicklung Preise ab Werk (€/m³) Schnittholz (Q1 2001 – Q3 2024)

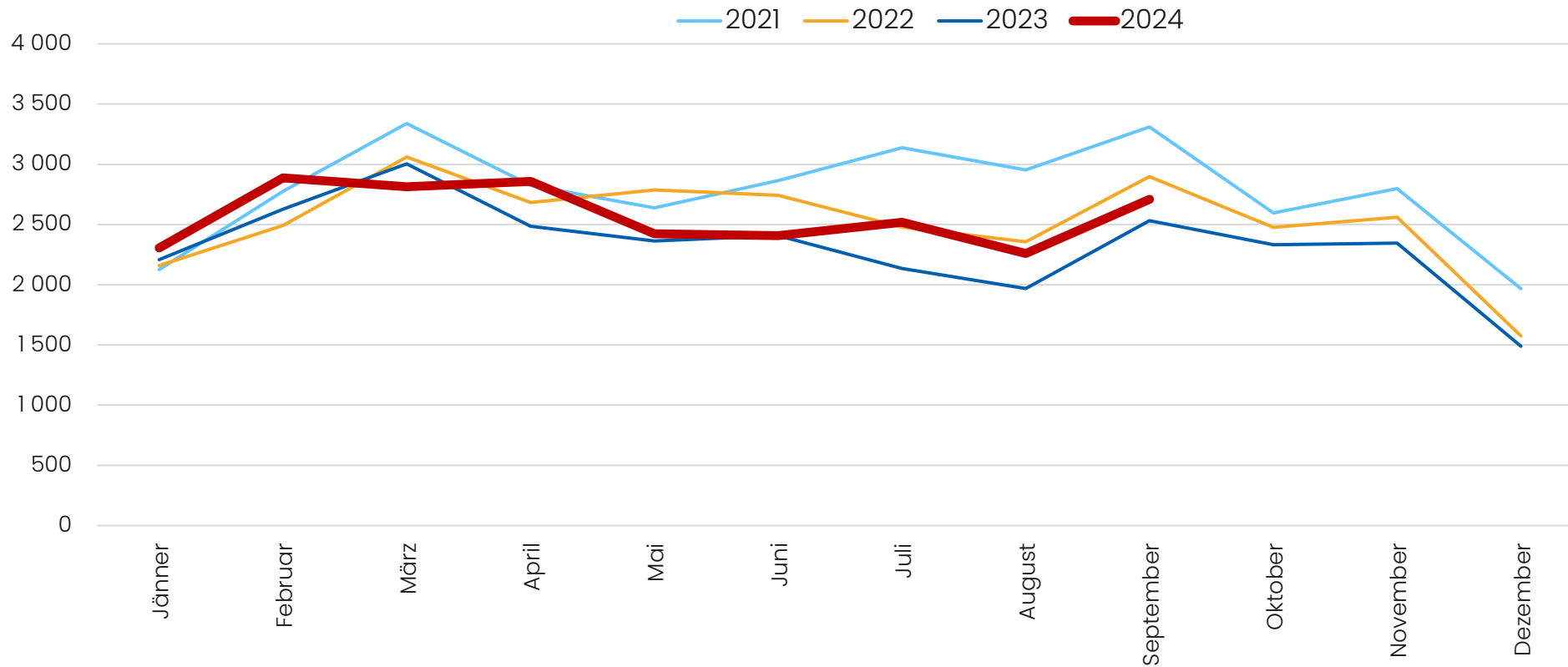


Entwicklung Preise frei Werk (€/fm)

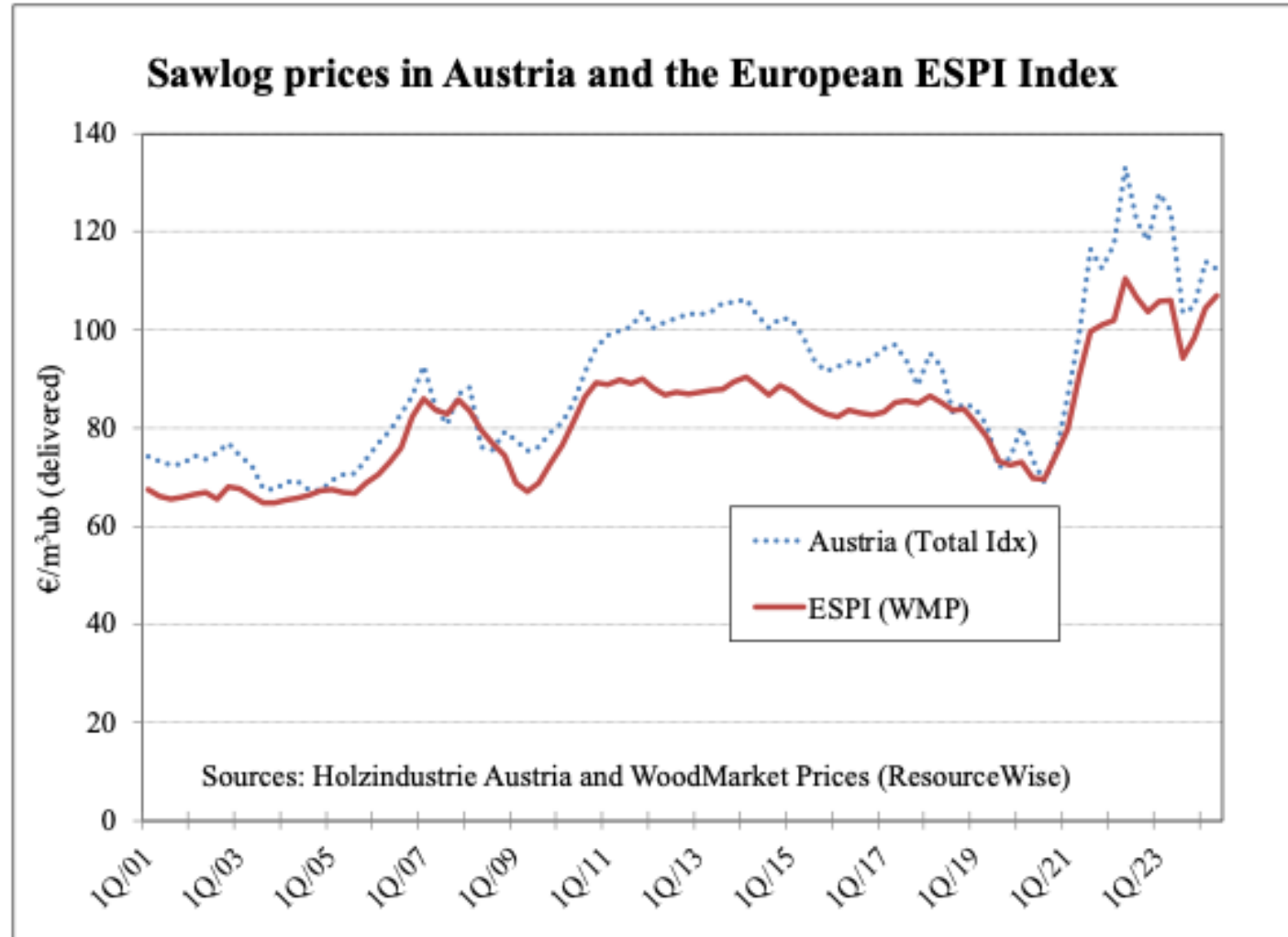
Rundholz alle Dimensionen und Sortimente (01/2001 – 09/2024)



Durchschn. Rundholzübernahme frei Werk (fm) Rundholz (01/2012 – 09/2024)

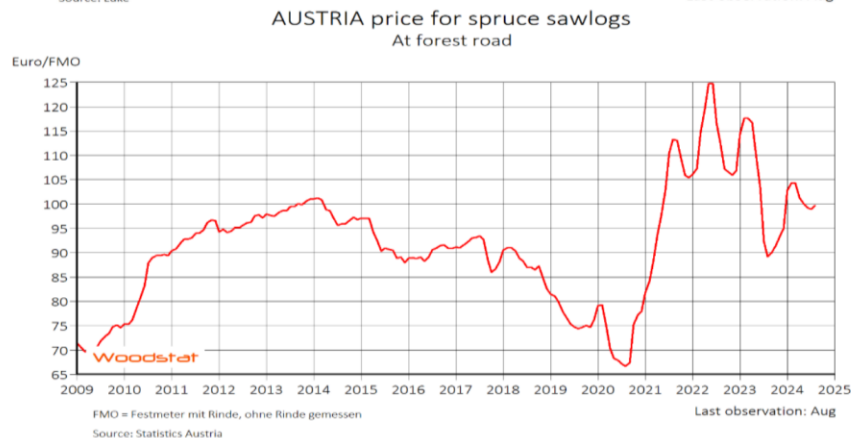
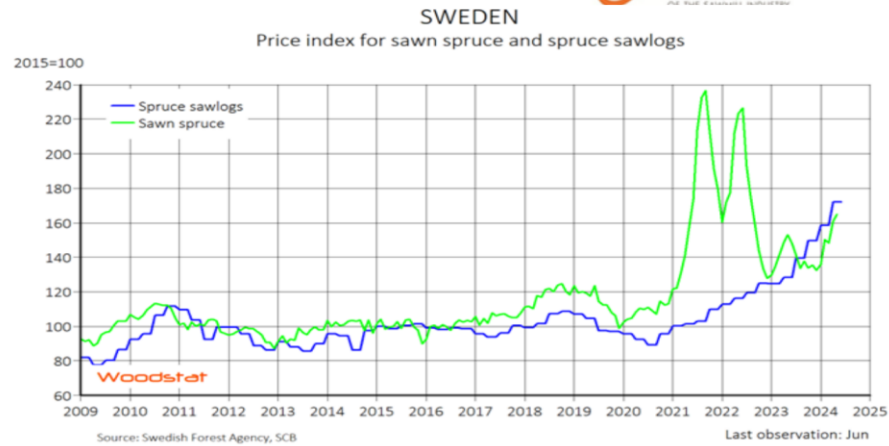
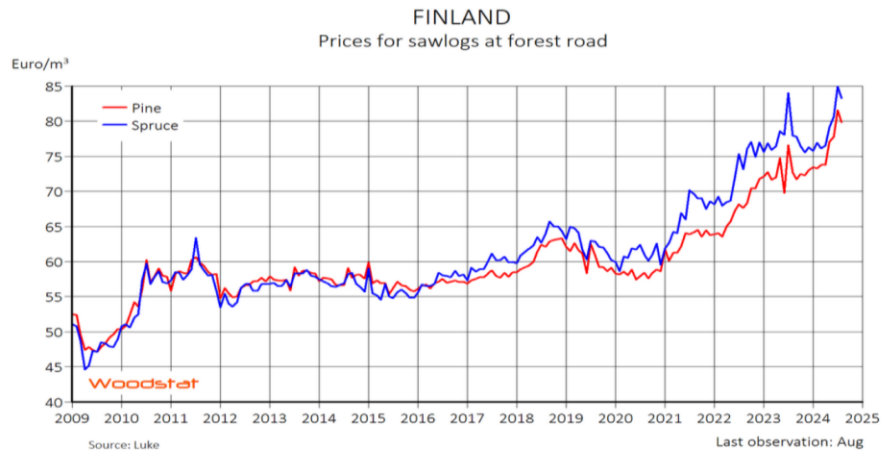


Sägerundholzpreis im europäischen Vergleich Q2 2024



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Raw materials prices in the Nordics record-high and CE stable on a high level:



- **Finnish and Swedish sawlogs** at forest road decreased slightly during summer. But stay on a **record high** level compared to previous years.
- **Sawlog prices in Central Europe** decreased from the peak years. But remain on a **high level**.

- **Sägeindustrie:**

- Schnittholzproduktion 2023 lag bei 9,4 Mio m³
- Prognose 2024 mit 9,8 Mio m³ erwartet
- „Seitwärtsbewegung“
- für 2025 werden keine wesentlichen Veränderungen erwartet



Benutzerfreundliche Oberfläche



Jeder Abruf in der Vollversion (ehem. Berichtsgröße „Extra“) zum „Standard“-Preis



Übersichtliche Gestaltung durch grafische Elemente



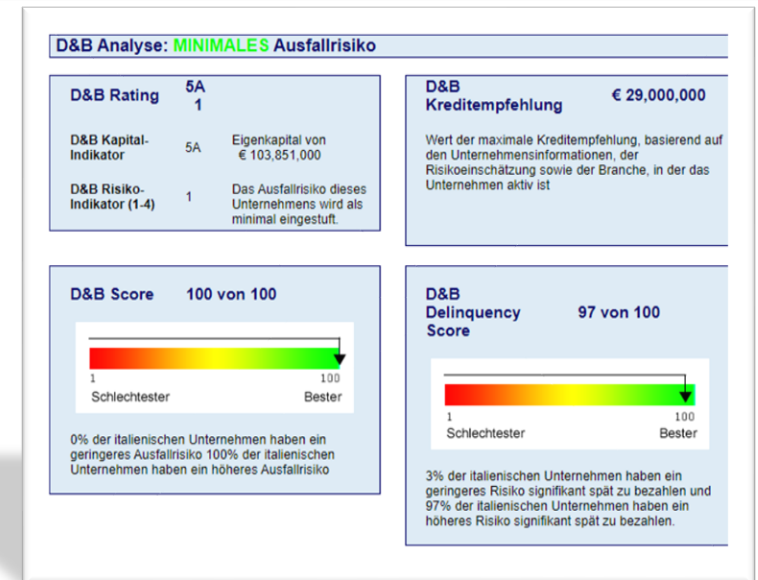
Information über Hauptsitz, Filiale bzw. inaktive Geschäftstätigkeit gleich bei der Suche



Status der Geschäftsbeziehung



Monitoring



Frankfurter Maschinenbau Aktiengesellschaft	D-U-N-S	Auskunft vom	Geschäftsbeziehung beendet
60327 Frankfurt am Main, Mainzer Landstr. 127-128 Deutschland	317273787	19.09.2022	ERNEUT BESTELLEN

PLASTITOMAX SRL	D-U-N-S	Auskunft vom	AUSKUNFT ANZEIGEN
22030 EUPILIO, LOCALITA' CASCINA GERA 8 Italien	433777307	19.09.2022	ERNEUT BESTELLEN

Vielen Dank für Ihre Aufmerksamkeit

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