### Production

In 2001, the positive development of the wood industries of the past years continued. The production amounted to 5.4 billion Euro. Compared to 2000 this means an increase of 0.6% (see charts on page 6).

### Enterprises, Employees

The wood industries have about 1,800 enterprises (1,490 sawmills). Most of the enterprises are of a medium-sized structure. Worth to mention is the fact that these enterprises are almost entirely privately owned.

The Austrian Wood Industries is well known as an important and reliable employer. With 33.296 persons employed, the number of employees in the wood industries increased by 0.2%. The wood industries is therefore one of the few industries where the number of employees has increased.

### Foreign Trade

The wood industries is a highly export oriented sector. The export rate amounts more than 50%. The exports consist mainly of sawn softwood, wood based panels and skis. In 2001, the total export volume was 3.76 billion Euro, which corresponds to an increase of 4.8% over the figure in 2000. With 67.7%, the European Union is the most important market for Austrian wood products. The two main export countries are Germany and Italy.

The imports of wood products have decreased in 2001. In total, products amounting to 2.52 billion Euro were imported (see table on page 7).

In 2001, the traditional trade surplus increased to an total amount of 1.24 billion Euro, see charts on page 8.

### Branches

The wood industries is an extremely wide ranging economic sector. The most important branches, as regards the production, are the sawmilling industry, the furniture industry, the construction elements industry, the wood based panels industry (particle- and fibre board and solid wood panels) and the ski industry.

## Construction Elements Industry

In 2001, the production by the construction elements industry amounted to 1.51 billion Euro. This is a 3.2% decrease. The various branches of this sector show a declining development.

Regarding windows, the most important branch, the production decreased to 371 million Euro in 2001. The production of prefabricated wooden houses also decreased by 3.5% to 309 million Euro. The door sector showed a declining development. The production decreased by 7.7% to 238 million Euro. As regards wood floorings (parquet and softwood floor boards), the production increased by 15.1 % to 121 million Euro. The production of glued laminated timber elements showed a positive development. It increased by 17.6% to 161 million Euro.

### Foreign Trade

The exports of **windows** declined by 6.1% in volume and by 5.6% in value to 21.8 million Euro. The imports fell significantly by 22.9% in volume and by 2.8% in value to 24 million Euro. See table on page 16.

As regards **doors**, the year 2001 was characterised by a marked increase in imports by 14.9% in volume and 6.6% in value. In total, doors amounting to 33.3 million Euro were imported. The export showed a downward trend in 2001. The decrease in exports amounted to 3.8% in value and 1.3% in volume. In total, the export amounted to 24 million Euro. See table on page 16.

Regarding **wood floorings**, the year 2001 showed a positive development of the exports. They increased by 15% in value to 87.8 Mio. Euro and by 17.9% in volume. The imports fell by 2.9% in value to 76.9 Mio. Euro but increased by 0.4% in volume. See table on page 16.

Regarding **laminated timber**, the exports show an increase of 49.2% in volume and 56.5 % in value to 83 million Euro. The imports also went up by 7.1% in value to 14 million Euro and by 16.1% in volume. Italy, with an export quota about 50%, is the main market for Austrian laminated timber.

## Furniture Industry

In 2001, the Austrian furniture industry produced furniture in the value of 1.36 billion Euro (- 0.2% as compared to 2000), of which 416 million Euro (24.7%) could be sold abroad (+ 7,5% as compared to 2000). The volume of the Austrian domestic market in 2001 amounted to 1.68 billion Euro (- 3.2% as compared to the previous year).

Imports contributed a total of 741 million Euro (44%) to the home market in 2001. Compared to the year 2000 imports decreased by 3.9%.

With the exception of "chairs and settees", all product categories recorded a drop in sales ranging between -6.0% (shop furniture) and -1.2% (kitchen furniture) in 2001 compared to the preceding year. By contrast, the market for seating systems property experienced a 6.3% growth rate compared to the year 2000.

The negative trend in the home market has been compensated, however, by increased successes in the export markets. Compared to the preceding year exports increased by 7.5% in 2001. Again "chairs and settees" are in the lead, being up significantly compared to the year 2000. Exports also rose considerably in the sectors seating systems for homes (+19.5% compared to the preceding year) and office furniture (+19.9%). In the other product categories exports have been on the decline.

Thus the production is recording a very slim plus of 0.2% compared to the year 2000. Whereas sales were up in the product groups "chairs and settees" (+18.5% compared to the preceding year), seating systems for homes (+7.3%) and office furniture (+1.5 %), drops in sales were recorded in the other categories.

## Wood based Panels Industry

In 2001, the domestic particle and fibre board producers manufactured wood based panels in the amount of 608.4 million Euro (in 2000: 572.6 million Euro). The total production included MDF boards amounted to 692.7 million Euro.

The highest share thereof goes to the particle board production with 550.4 million Euro (in 2000: 521.1 million Euro). The value of the fibre boards produced amounted to approximately 58 million Euro (2000: 50.9 million Euro). The production of MDF boards amounted to 84.3 million Euro.

The volume of the particle and fibre boards produced was increased from 1.98 million m³ in 2000 to 2.17 million m³. The growth in turnover was also due to a rise in production of processed products. The volume of MDF boards was 383.000 m³.

**Foreign Trade**

In 2001, the export share amounted to 80%. While the imports amounted to 115.3 million Euro (in 2000: 120.3 million Euro), the exports amounted to 559.4 million Euro (in 2000: 493.2 million Euro). This results in a trade surplus of about 444 million Euro in 2001 while in 2000 it amounted to 373 million Euro. See table on page 24.

**A strong international position**

European-wide, domestic producers are the most important producers of wood based panels with a production volume of 15 million m³ per year, which corresponds to an approximately 30 % share in the total European production volume of 50 million m³.

**Solid wood panels**

The production value of the three-ply and multiply-layer solid wood panels amounted to a total 73 million Euro. In 2001, the production value of the single layer solid wood panels amounted to 17.8 million Euro.

Regarding solid wood panels, the trade surplus in 2001 amounted to almost 70 million Euro. This is an increase of 7.7%. See table on page 26.

## Sawmilling Industry

The production by the Austrian Sawmilling Industry in 2001 amounted to 1.66 billion Euro. Compared to 2000 this means a decrease of 2%, which was characterised by the storm catastrophe of December 1999. The production of sawnwood amounted to 10.26 million m³ (see table on page 27). The sawmilling industry comprises about 1,500 enterprises of which about 1,300 are small-scale, and the total number of persons employed is about 10,000.

**Foreign Trade**

In 2001, the **exports** of sawn softwood reached the 6 million m³ mark. This means a decrease of 0.3% as compared to 2000 (6.02 million m³). In terms of value the sawmilling industry has exported a volume of almost 1 million Euro (in 2000: 1.04 billion Euro). See tables on page 28.

Approximately 2/3s of all the exports go to Italy, our main export market. In 2001, the exports grew by about 1% to 3.93 million m³ as compared to 2000 (3.88 million m³).

The US market showed a positive development. The exports increased by almost 30% to 242.000 m³.

The Japanese market decreased by 6% to 472.000 m³ sawn softwood.

The export of sawn hardwood could be increased. In all, 150.000 $m^3$ were exported in 2001 (in 2000: 141.000 $m^3$).

The **imports** showed a downward trend in 2001. The total import of sawn softwood amounted to almost 1.13 million $m^3$. This is a 5% decrease over the figure of the previous year (in 2000: 1.19 million $m^3$). The value of the imports amounted to 174 million Euro (see tables on page 27).

The sawmilling industry contributes essentially to the trade surplus in the Austrian Wood Industries.

**PEFC - implementation has started**

An important concern of the Austrian Sawmilling Industry is to quickly implement the certification system according to PEFC. The forests in Austria are completely certified according PEFC since February 2002. The certification in the chain of custody has started. PEFC Austria expects almost 200 certified sawmills until the end of 2002.

## Ski Industry

The upswing in the Austrian ski industry reached another peak in the 2001 season. On the whole the production figures of alpine skis rose again, a 14% growth to approximately 3 million pairs was recorded. This is an increase by about one third since 1998! In view of the basically stagnant world market the fact that the sales figures of Austrian **ski brands** were up is indeed remarkable. Especially in the important European markets such as Germany, Italy and even France, the ski industry were able to win market shares. Skis made in Austria stand for innovation and technological edge, and in terms of  image they have ousted their rivals from the number-one-position in many countries. This is not least due to the great successes of Austrian skiers and brands in the alpine skiing world cup. Their impact on marketing should not be underestimated. Increasing ratings and a heightened interest on the part of the general public are the reasons why the companies have been getting more involved in the world cup than before.

**Europe is the most important market**

There has been a dramatic shift in the export markets in the past few years. With a share of approximately 60%. Europe is clearly the most important market for the domestic manufacturers today. Importing more than 590,000 pairs of skis Germany is the largest buyer, followed by France, which imports approximately 460,000 pairs, Italy (almost 300,000) and Switzerland (a little more than 200,000 pairs). Including cross-country skis they sell approximately 300,000 pairs in Scandinavia.

Due to the economic crisis in Asia Japan has reduced imports of alpine skis. During the 2001 season they exported fewer than 400,000 pairs to Japan. Without doubt the largest growth potential is in the USA. The export earnings for alpine skis rose to a total of approximately 197 million Euro in the 2001 season, including cross-country skis and snowboards even to 247 million Euro.

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