



The 2006-2015 Outlook for the Sawn Lumber Market in Russia

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Summary

Between 2006 and 2010 production of sawn lumber in Russia went up by 16% from 22.1 million cubic meters to 25.7 million cubic meters. The maximum production growth was observed in 2010, when it increased by 35% from the previous year. The largest decrease of domestic production fell on the crisis of 2009 and amounted to 12%.

In 2011-2015 production of sawn lumber will persist in growing by 2-2.5% annually and it will have increased to 28.7 million cubic meters by 2015. The main volume of sawn lumber in Russia will be produced in the domestic market.

The volume of sawn lumber production in Russia went up from 20.6 million cubic meters in 2006 to 23.6 million cubic meters in 2010. During the five year period, the sales growth amounted to 14.6%. The major volume of sawn lumber sales in Russia falls on coniferous sawn lumber - 93.1%. The share of deciduous sawn lumber in 2010 reached 5.4% of the total volume of sales (1.3 million cubic meters). The share of Sawn lumber made from larch-tree equaled 1.5% (0.4 million cubic meters). In 2011-2015 the actual volume of sawn lumber sales will be increasing on average by 3.7% annually and by 2015 it will have reached 28.3 million cubic meters.

The 2006-2015 Outlook for the Sawn Lumber Market in Russia contains the essential data, necessary to comprehend the current market opportunities and conditions and to assess the future prospects, covering such points as:

- The overall assessment of the economic environment in Russia
- Capacity of the sawn lumber market
- Balance of demand for and supply of sawn lumber
- Number of customers and volume of purchase
- Economic output, total exports and imports, the volume of merchandise in storage
- Cost price, retail price, import and export cost
- Ratings of the industry in terms of economic output and sales revenue
- Financial and economic profiles of leading enterprises.

In the Russian survey of the sawn lumber market the information is detailed by the region of the country.

In the report the products are categorized the following way:

- Sawn lumber made from larch-tree
- Coniferous sawn lumber
- Deciduous sawn lumber

The report contains information about the following manufacturers of sawn lumber in Russia: Lesosibirskiy Wood-Working Complex No 1, Novoeniseyskiy Wood and Chemical Plant, Ust-Yilimsk Wood-Sawing and Woodworking Plant, Wood Plant 25, Swedwood Tikhvin, Pestovo Wood-Sawing Plant, Svir Timber, Wood-Sawing Plants of Yugra, Wood Producing Company "Syktyvkar Woodworking Complex", Onega Wood-Sawing and Woodworking Plant, Northern Wood Producing Partnership - Wood Plant No 3. Solombalskiy Wood-Sawing and Woodworking Plant, Joint company Sibexportles-Tairiku, Altai-Forest, Setnovo.

The survey is based on the official statistics, obtained from:

- Federal State Statistics Service of the Russian Federation
- Ministry of the Economic Development of the Russian Federation
- Federal Customs Service of the Russian Federation
- Federal Tax Service of the Russian Federation

Apart from the official statistics, the survey also contains the results of the research done by BusinessStat:

- Audit of sawn lumber trade in Russia
- Survey of experts of the sawn lumber market

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Classification of Sawn Lumber

Sawn lumber is a sawn wood material obtained in the process of log treatment, is sorted by size and quality and intended for manufacture of sawn parts and workpieces. Sawn lumber is the most widespread type of wooden building materials made from various species of wood.

By the type of processing, sawn lumber is classified into:

- Square edged sawn lumber
- Unedged sawn lumber
- Square edged one-sided sawn lumber

Square edged sawn lumber is the type of sawn lumber, which has four sawn sides, the backs of which are of the size within the allowed limits. The back is the part of log surface that remains on sawn lumber.

Unedged sawn lumber is the type of sawn lumber, which has the side face of the log instead of the edges. Sawn lumber of this type is used in manufactures, in which an ideal appearance of the product is not a necessary requirement.

Square edged one-sided sawn lumber has sawn faces and one edge, and the size of the back does not exceed the allowed extent.

By the degree of processing sawn lumber is subdivided into:

- Undressed sawn lumber
- Dressed sawn lumber

Depending on the purpose, dressed sawn lumber has different shapes of cross-section.

By the location of sawn lumber in the log (in relation to their long axis), the following types are distinguished:

- Comb-grained wood
- Center planks
- Outer planks

Comb-grained wood contains the heart pith and the biggest amount of branch stubs of all types, which lower the quality of wood. In many cases heart and arc shakes form in the central part of the growing trees. These kinds of planks are more subject to checking. As a rule, comb-grained wood is sawn with the thickness of 40 mm and more from thick logs.

In center planks the heart is sawn along the axis. Flaws on the inner face of the plank are better seen during the cutting process of the center planks. All the annual rings in the center planks are cut, which makes these type of planks less subject to checking compared to comb-grained wood. Center planks have better quality than comb-grained wood.

Outer planks are obtained during the cutting process of the log zone, situated between comb-grained wood or center planks and half-timber. Outer planks have fewer branch stubs and do not have branched knots. They are easy to scrape and have cleaner surface. Outer planks have fewer flaws and are characterized by better quality compared to comb-grained wood and center planks on condition that they result from conversion of the logs from the root of the full-length log.

By the form of cross-section sawn lumber is subdivided into:

- Furniture squares
- Stud blocks
- Planks
- Thresholds
- Half-timber

Furniture squares are the type of sawn lumber 100 mm and more thick and wide. According the number of sawn sides furniture squares can be two-edged, three-edged (wainscot billets) and four-edged.

Stud blocks are the type of sawn lumber (excluding aviation) up to 100 mm thick and with the length extending the thickness by up to two times.

Planks are the type of sawn lumber 16-100 mm thick and with the width extending the thickness by over two times.

Thresholds are the type of sawn lumber in the form of a bar, used for packing-up the rails.

Half-timber is the type of sawn lumber obtained from the side part of the log and containing one sawn and one non-sawn surface.

By species of wood sawn lumber is classified into:

- Produced from particular types of coniferous trees
- Produced from particular types of deciduous trees
- Produced from all types of coniferous and deciduous trees

Wholesale Price for Sawn Lumber

Table 27. Average wholesale price for sawn lumber, Russia, 2006-2010 (rubles per cubic meter; %)

	2006	2007	2008	2009	2010
Average wholesale price (rubles per cubic meter)	6,593.58	8,958.88	8,708.58	8,648.68	9,545.29
Dynamics (% deviation to previous year)	-	35.9	-2.8	-0.7	10.4

Source: *BusinesStat, Complex Analysis of Marketing Data.*

Table 28. Average wholesale price for sawn lumber, Russia, 2011-2015 (rubles per cubic meter; %)

	2011	2012	2013	2014	2015
Average wholesale price (rubles per cubic meter)	10,186.50	10,757.21	11,327.75	11,898.47	12,469.70
Dynamics (% deviation to previous year)	6.7	5.6	5.3	5.0	4.8

Source: *BusinesStat, Complex Analysis of Marketing Data.*

During the period from 2006 to 2010 the wholesale price for sawn lumber increased by 45%: from 6.6 thousand rubles per cubic meter to 9.5 thousand rubles per cubic meter. The price for sawn lumber is strongly influenced by the remoteness of raw materials from sawmills, quality and age of equipment at the sawmills and distance from the market. In addition, the price for sawn lumber depends on the tree species. So, in 2010 the most expensive lumber was deciduous – the price for it amounted to 11.3 thousand rubles per cubic meter.

During the period from 2011 to 2015 the prices for lumber in Russia will continue rising and by 2015 they will have amounted to 12.5 thousand rubles per cubic meter.

Table 29. Average wholesale price for sawn lumber, Russia, 2006-2010 (rubles per cubic meter; %)

	2006	2007	2008	2009	2010
Sawn lumber from larch (billion rubles)	6,341.77	8,999.46	9,172.53	9,763.41	10,047.01
Coniferous sawn lumber (billion rubles)	6,404.52	8,883.22	8,611.46	8,529.31	9,434.73
Deciduous sawn lumber (billion rubles)	9,259.93	9,969.38	10,134.49	10,466.58	11,320.90

Source: *BusinesStat, Complex Analysis of Marketing Data.*

Table 30. Average wholesale price for sawn lumber, Russia, 2011-2015 (rubles per cubic meter; %)

	2011	2012	2013	2014	2015
Sawn lumber from larch (billion rubles)	11,317.16	12,134.61	12,952.05	13,769.49	14,586.94
Coniferous sawn lumber (billion rubles)	10,084.60	10,655.25	11,225.90	11,796.55	12,367.20
Deciduous sawn lumber (billion rubles)	11,616.00	12,077.92	12,539.83	13,001.75	13,463.66

Source: *BusinesStat, Complex Analysis of Marketing Data.*

Table 63. Value of export of sawn lumber by country, Russia, 2006-2010 (thousand dollars)

Country	2006	2007	2008	2009	2010
Abkhazia	-	-	-	338.42	423.59
Afghanistan	4.25	62.23	-	-	32.90
Albania	-	-	-	-	21.48
Armenia	22.93	12.87	80.65	44.55	48.09
Australia	-	-	15.37	-	-
Austria	-	55.38	12.31	24.84	45.33
Azerbaijan	877.40	2,210.94	4,499.72	4,984.50	7,842.49
Belgium	87.23	61.16	12.15	46.16	42.42
British Virgin Islands	42.48	-	-	-	-
Bulgaria	12.29	58.76	8.96	19.12	13.02
Canada	41.13	382.57	57.83	272.59	2,219.66
China	652.65	231.27	228.15	108.21	523.23
Croatia	0.64	-	76.07	-	-
Cuba	-	0.03	-	-	-
Cyprus	53.98	1.42	-	14.39	26.95
Czech Republic	1,915.13	1,730.50	809.89	198.76	219.19
Denmark	366.08	187.08	102.20	75.44	71.17
Egypt	-	4.76	7.97	-	-
Estonia	633.45	1,910.54	3,497.00	2,563.23	1,397.33
Ethiopia	106.41	-	-	-	-
Faroe Islands	-	-	-	1.96	-
Finland	53.37	65.68	2,021.32	1,756.64	8,544.03
France	295.74	742.69	2,636.55	1,174.35	1,084.69
Germany	1,360.44	1,876.53	2,899.29	2,195.53	3,102.18
Georgia	66.02	210.93	488.77	86.35	73.12
Greece	410.45	284.27	201.13	137.53	34.96
Hungary	30.75	39.09	43.70	299.96	200.98
Iceland	-	-	13.13	-	-
India	-	-	21.57	-	-
Iran	7.35	4.90	26.09	21.27	180.81
Ireland	-	-	21.22	-	-
Israel	-	16.26	0.24	0.50	10.38
Italy	174.22	81.79	124.43	290.79	126.24
Japan	6.60	27.12	-	-	14.37
Kazakhstan	5,626.65	10,335.32	7,978.82	5,654.60	2,862.15
Korea (DPRK)	50.94	97.61	45.68	-	-
Korea (Republic)	1,535.75	1,778.35	98.86	116.18	62.29
Kyrgyzstan	396.02	1 056.02	816.05	530.30	548.51
Latvia	615.09	1,054.11	497.62	127.24	84.26
Lithuania	4,563.34	5,432.50	5,221.93	3,015.49	2,606.66
Malaysia	13.36	21.56	-	-	8.18
Mali	-	-	-	8.62	-

Mauritius	-	-	-	11.13	-
Moldova	898.63	1,888.62	2,156.54	1,766.73	2,158.85
Mongolia	4.57	62.47	110.18	23.90	68.33
Montenegro	-	-	-	22.44	-
Netherlands, the	852.07	898.78	1,324.28	354.95	276.66
Norway	24.35	190.17	23.24	250.25	122.07
Poland	296.62	231.58	321.10	548.25	542.09
Republic of South Africa, the	-	0.53	-	-	-
Reunion	-	-	89.86	67.83	163.37
Romania	17.12	-	51.89	24.01	-
Serbia	-	-	-	-	33.36
Slovakia	352.50	551.36	892.27	634.85	548.12
Slovenia	22.85	-	-	-	-
South Ossetia	-	-	-	14.48	45.22
Spain	35.73	148.52	53.60	8.11	-
Spitsbergen	-	-	15.27	-	-
Sweden	441.58	511.33	150.65	31.86	518.49
Switzerland	56.37	92.89	225.51	-	-
Taiwan	-	-	-	-	26.99
Tajikistan	61.81	97.60	520.47	337.35	550.44
Turkey	256.08	272.59	106.04	377.79	1,165.74
Turkmenistan	13.48	21.17	15.50	83.84	160.87
Ukraine	1,143.04	1,971.49	2,840.34	1,221.06	2,055.20
United Arab Emirates, the	75.88	-	-	-	16.53
United Kingdom, the	2,343.47	3,584.21	1,924.15	1,172.69	756.78
United States of America, the	882.59	389.71	89.07	167.60	38.85
Uzbekistan	233.64	259.70	354.14	402.85	536.40
Yugoslavia	50.92	-	-	-	-
Other countries	50.91	53.78	-	-	-
All countries	28,136.33	41,260.71	43,828.70	31,629.46	42,254.97

Source: Federal Customs Service of the Russian Federation. Customs Declaration / Transit Entry for participants of the foreign economic activity "Record of Cargo and Fund Transit across the Border".

Index "Export of Sawn Lumber" is calculated by multiplying the net weight of the cargo (tons) by the cost of one ton of the cargo (dollars per ton). The weight of all the cargoes is taken into consideration. Unit of account: all enterprises engaged in foreign economic activities in Russia.

Table 64. Value of export of coniferous sawn lumber, including larch, by country, Russia, 2006-2010 (thousand dollars)

Country	2006	2007	2008	2009	2010
Abkhazia	-	-	-	263.02	420.17
Afghanistan	4.25	-	-	-	32.90
Albania	-	-	-	-	21.48
Armenia	3.69	11.43	40.34	44.55	43.53
Australia	-	-	15.37	-	-
Austria	-	55.38	-	17.04	42.31
Azerbaijan	2.70	582.11	2,497.58	2,838.75	6,158.82
Belgium	46.06	50.02	-	-	42.42
British Virgin Islands	20.87	-	-	-	-
Bulgaria	12.29	58.42	8.96	19.12	13.02
China	3.45	-	24.30	2.95	85.74
Croatia	0.64	-	76.07	-	-
Cuba	-	0.03	-	-	-
Cyprus	-	-	-	14.39	26.95
Czech Republic	1,915.13	1,710.86	809.89	198.76	215.54
Denmark	353.35	157.40	79.83	75.44	71.17
Egypt	-	4.76	7.97	-	-
Estonia	167.31	1,383.53	3,126.19	2,470.05	1,299.99
Ethiopia	106.41	-	-	-	-
Faroe Islands	-	-	-	1.96	-
Finland	47.71	65.68	2,021.32	1,756.64	8,482.44
France	295.74	742.69	2,565.60	1,130.97	1,084.69
Germany	661.74	1 471.07	2,728.78	2,007.61	2,929.04
Georgia	27.30	135.49	395.28	2.80	22.95
Greece	185.04	55.47	70.01	-	-
Hungary	30.75	38.88	31.20	299.96	200.98
Iceland	-	-	13.13	-	-
India	-	-	21.57	-	-
Iran	-	4.90	26.09	21.27	151.53
Ireland	-	-	21.22	-	-
Israel	-	-	-	-	10.38
Italy	119.88	81.79	124.43	290.79	126.24
Japan	6.60	27.12	-	-	14.37
Kazakhstan	4,251.33	8,144.56	6,122.27	4,699.27	2,366.40
Korea (DPRK)	-	97.61	45.68	-	-
Korea (Republic)	1,535.75	1,777.29	98.86	114.95	48.58
Kyrgyzstan	158.61	670.12	706.23	423.68	504.88
Latvia	495.33	931.16	486.21	42.84	3.11
Lithuania	1,825.59	720.95	402.42	25.80	102.20
Malaysia	13.36	21.56	-	-	8.18
Mali	-	-	-	8.62	-

Mauritius	-	-	-	11.13	-
Moldova	883.42	1,888.62	2,154.87	1,765.57	2,158.85
Mongolia	4.57	57.98	110.18	23.90	68.33
Montenegro	-	-	-	17.80	-
Netherlands, the	96.83	418.98	718.96	54.76	84.32
Norway	24.35	128.20	6.05	250.25	115.42
Poland	31.23	17.57	74.73	461.62	542.09
Republic of South Africa, the	-	0.53	-	-	-
Reunion	-	-	89.86	67.83	163.37
Romania	17.12	-	51.89	24.01	-
Serbia	-	-	-	-	31.09
Slovakia	352.50	551.36	892.27	634.85	548.12
Slovenia	1.12	-	-	-	-
South Ossetia	-	-	-	14.48	45.22
Spain	35.73	92.61	53.60	8.11	-
Spitsbergen	-	-	15.27	-	-
Sweden	116.56	10.71	-	-	128.30
Switzerland	56.37	92.89	225.51	-	-
Taiwan	-	-	-	-	25.52
Tajikistan	61.10	96.01	512.64	323.68	535.13
Turkey	241.25	272.59	61.91	377.79	1,165.74
Turkmenistan	13.48	-	1.50	83.84	133.41
Ukraine	1,077.13	1,966.90	2,810.67	1,206.24	2,049.45
United Arab Emirates, the	-	-	-	-	0.58
United Kingdom, the	2,095.38	3,108.31	1,607.28	1,056.66	736.94
United States of America, the	156.05	31.64	63.41	126.95	-
Uzbekistan	227.94	256.85	265.36	388.29	532.06
Yugoslavia	8.46	-	-	-	-
Other countries	35.98	42.09	-	-	-
All countries	17,827.43	28,034.09	32,282.74	23,668.98	33,593.94

Source: Federal Customs Service of the Russian Federation. Customs Declaration / Transit Entry for participants of the foreign economic activity "Record of Cargo and Fund Transit across the Border".

Index "Export of Coniferous Sawn Lumber, Including Larch" is calculated by multiplying the net weight of the cargo (tons) by the cost of one ton of the cargo (dollars per ton). The weight of all the cargoes is taken into consideration. Unit of account: all enterprises engaged in foreign economic activities in Russia.