



○ *Import of secondary timber products by the EU28*

The Netherlands in focus

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TABLE OF CONTENTS

Table of Contents.....	i
Executive summary	iii
1. Introduction	1
2. Method	3
2.1 Defining secondary timber products	3
2.2 Trade data analysis	3
2.3 Product specific information.....	4
3. Results data analyses EU28.....	5
3.1 Share of secondary timber products in total EU28-extra imports.....	5
3.2 EU28 main importing countries of secondary timber products	6
3.3 Main secondary timber products within EU28-extra imports.....	7
3.3 Countries of origin of the secondary timber products within EU28-extra imports.....	8
4 Results data analyses The Netherlands	16
4.1 Share of secondary timber products in total EU28-extra imports.....	16
4.2 Main secondary timber products within EU28-extra imports.....	17
4.3 Selected secondary timber products	22
4.3.1 Other seats, with wooden frames (upholstered and not)	22
4.3.2 Books.....	28
4.3.3 Packaging of paper and paperboard.....	35
4.3.4 Wood based charcoal.....	40
4.3.5 Guitars (acoustic and amplified)	43
5. Recommendations	48
Annex 1 Combined Nomenclature codes	50
Annex 2 Ranking of EU28 countries based on import value.....	53
Annex 3 Ranking of secondary timber products imported by the EU28	59
Annex 4 Ranking of secondary timber products imported by the Netherlands.....	67
Annex 5 EU28-extra imports of wood pellets.....	75
Annex 6 Enquiry	77
Annex 7 List of large companies within the home furnishing market in the Netherlands	79

EXECUTIVE SUMMARY

Most attention in EU timber trade statistics is on primary timber products as these, for a long time, have been the most important type of timber products imported by EU countries. The imports of secondary timber products have however increased substantially during the last decades. The main reasons for the increase are the economic development in the countries or regions of origin of the products (e.g. China, South East Asia and South America), a shift of processing outside of the EU to low-cost countries and export bans for roundwood. As a result, secondary timber products should get more attention in timber trade analysis. This is however not easy. The large variety of products makes comparison between products, based on their weight or other measurement of quantity difficult, as reliable conversion factors lack. Therefore the import value is most often used as the measuring unit to present information on the developments in trade of secondary timber products.

For a number of reasons WWF Netherlands wants to increase their knowledge base on the secondary timber products trade to the EU in general and the Netherlands in particular:

1. to enhance sustainability in tropical timber flows from WWF Priority Places¹.
2. to be able to judge whether more products should be placed under the EU Timber regulation (EUTR).
3. to support WWF organisations in other countries (e.g. China) with data, e.g. to stress the importance of setting up instruments similar to the EUTR in their countries.
4. to identify major Dutch importers of secondary timber products from outside of the EU to see if they need to be supported to increase responsible sourcing.

The overarching aim of the study is to give WWF insight into the most important secondary timber products import streams to the EU in general and the Netherlands in particular. This concerns in particular products that fall outside the scope of the EUTR. The study should also, where possible, provide more information on which secondary wood products contain wood originating from WWF Priority Places.

For this reason the EU28 import of secondary timber products from outside the EU (EU28-extra) has been studied for the EU28 in general and the Netherlands in particular. The Eurostat COMEXT database has been used for the trade data on the EU28. For the Netherlands the international trade statistics database of Statistics Netherlands (CBS) has been used. The first step in the analysis was to identify the share of secondary timber products within the total EU28-extra imports of timber products (both primary and secondary). Based on value the average share of secondary timber products within the total imports was 49.9% in the period 2008-2013. Based on quantity the average share was 18.6% in the same period.

The second step was to identify the main EU28-extra importing countries of secondary timber products within the EU28. Based on value the top five, in the order 1 to 5, for the year 2013 is: United Kingdom, Germany, France, Netherlands and Italy. The top 5 and the order within it did not change whether the total import, the import of products under the EUTR or the import of secondary products exempted from the EUTR was considered.

¹ Please refer to http://wwf.panda.org/what_we_do/where_we_work/ for an overview of all WWF priority places.

Making a ranking of the main secondary timber products within the EU28-extra imports was the third step in the analysis. This ranking based on value has been performed for the total import of secondary timber products, the import of products under the EUTR and the import of secondary products exempted from the EUTR.

The countries of origin of the top 10 (total, EUTR and non-EUTR) products from the third step of the analysis have been determined during the fourth step of the analysis that was performed for the EU28 as a whole.

Steps 1 and 3 from the analysis for the EU28 have been repeated for the Netherlands. The average share of secondary timber products within the total EU28-extra imports by the Netherlands was 56.1% based on value and 28% based on quantity in the period 2008-2012. Next to this a ranking of the main secondary timber products based on value as well as the quantity has been made.

Based on the EU28-extra trade of secondary timber products by the EU28 and the Netherlands and a set of selection criteria, 5 secondary timber products imported by the Netherlands were selected to study in more detail. The selection criteria have been determined by WWF Netherlands in cooperation with Probos. In random order these selection criteria are:

- a) The total value and/or quantity of the EU28-extra imports by the Netherlands;
- b) The product is exempted from the EUTR;
- c) The product is likely to originate from a WWF priority place;
- d) The country/region of origin of the product or the raw material (high-risk or not).

Table a

The selected secondary timber products in random order

Product	CN codes	Applicable selection criterion
1. Other seats, with wooden frames (upholstered and not)	94016100 and 94016900	a, b and d
2. Books	49011000, 49019100 and 49019900	a, b and d
3. Packaging of paper and paperboard	48191000, 48192000, 48193000, 48194000, 48195000, 48196000, 48237010 and 48237090	a and d
4. Charcoal (including shell or nut charcoal)	44029000	a, b, c and d
5. Guitars (both acoustic and amplified)	92019030 and 92079010	b, c and d

Table a includes an overview of the codes from the Combined Nomenclature (CN) that the product name refers to and the selection criteria that apply to the specific product. An additional reason for selecting wood based charcoal is the strong link of charcoal production to forest degradation and deforestation in developing countries. As charcoal and fuelwood are the main energy source for heating and cooking².

For each of these 5 selected products a detailed study has been performed in order to try to provide information on the general market structure, the origin and type of timber used in the products (raw material use) and the availability of the products with a certificate for

² <http://blog.worldagroforestry.org/index.php/2013/10/03/unpacking-the-evidence-on-firewood-and-charcoal-in-africa/>

sustainable forest management and issues concerning the legality of the timber used. The analysis made clear that there is a large difference concerning the information availability related to these three topics amongst the selected products. Next to this the complexity of the markets differ a lot between the products. Table b summarizes the results of the analyses for the 5 selected secondary timber products.

Table b.
Summary of the results for the 5 selected secondary timber products EU28-extra imported by the Netherlands

Product	EU28-extra import in 2012 (in € 1,000)	EU28-extra import in 2012 (in 1,000 tons)	Share within total EU28-extra secondary timber products imports in 2012 based on:		Share within total EU28-extra imports of primary and secondary timber products in 2012 based on:		Top 3 of important countries of origin in 2012	Timber species	Major importers	Sustainability
	Value	Quantity	Value	Quantity	Value	Quantity				
Other seats with wooden frames: upholstered	€ 100,728	22,207	7.8%	1.7%	4.5%	0.53%	Based on value: 1. China (74.4%) 2. Turkey (7.1%) 3. Serbia (4.5%) Based on quantity: 1. China (75.5%) 2. Serbia (6.4%) 3. Turkey (6.1%)	Limited information. Panels (MDF and particle board) used for upholstered furniture like sofas etc. Russian birch and oak may be used for furniture production in China. Increasing imports of temperate hardwoods from Europe and the USA and increasing use of domestic poplar and other plantation species in China. Rubberwood (mainly in Malaysia and Thailand), plantation teak (mainly in Indonesia) and acacia (mainly in Malaysia and Indonesia)	See annex 7	Availability of products with a FSC or PEFC certificate is limited. FSC COC available in producer countries. Potential high risk species used mainly in China.
Other seats with wooden frames: not upholstered	€ 32,706	11,099	2,5%	0.8%	1.5%	0.26%	Based on value: 1. China (44.9%) 2. Vietnam (24.8%) 3. Indonesia (17.3%) Based on quantity: 1. China (44.7%) 2. Vietnam (24.6%) 3. Indonesia (19.2%)	Indoor furniture: Russian birch and oak may be used for furniture production in China. Increasing imports of temperate hardwoods from Europe and the USA and increasing use of domestic poplar and other plantation species. Rubberwood (mainly in Malaysia and Thailand), plantation teak (mainly in Indonesia) and acacia (mainly in Malaysia and Indonesia) For garden furniture durable timber species such as (plantation) teak, meranti, rubberwood and acacia are, in random order, the main timber species used for garden furniture that is imported from South East Asia.	No information on indoor furniture. Companies importing garden furniture indicate that the market share of FSC certified wooden garden furniture is increasing on the Dutch market.	Availability of products with a FSC or PEFC certificate is limited. FSC COC available in producer countries. Potential high risk species used mainly in China.
Books (other): mainly educational books	€ 67,916	14,657	5.3%	1.1%	3.0%	0.34%	Based on value: 1. China (52.0%) 2. USA (30.6%) 3. Hong Kong (5.4%) Based on quantity: 1. China (71.2%) 2. USA (9.0%) 3. Hong Kong (6.2%)	No information	- Malmberg - Noordhoff Uitgevers - Sdu Uitgevers - Koninklijk Boom uitgevers B.V. - Koninklijke BDU - Uitgeverij Educatief - ANWB media - Uitgeverij Zwijsen	Companies indicated to work with COC certified companies, but are not aware of the share of certified materials nor demand the materials itself to be certified.
Packaging of paper & paper board	€ 69,300	20,274	5.4%	1.5%	3.1%	0.48%	Based on value: 1. China (53.2%) 2. USA (13.1%)	No information ³	No information ³	No information ³

³ Due to time constraints it was decided to exclude this product group for further analysis.

							3. Switzerland (10.0%) Based on quantity: not available			
Charcoal	€ 10,400 ⁴	30,000 ⁴	0.8%	2.3%	0.5%	0.71%	Based on value: 1. Nigeria (20.0%) 2. India (16.8%) 3. Sri Lanka (12.9%) Based on quantity: 1. Nigeria (27.9%) 2. Russian Federation (19.4%) 3. India (9.9%)	No information	- Dammers Houtkool - Masterfire - Fire-UP - Golden flame - Terlanco - Tasmania Handel-Maatschappij	Some FSC certified charcoal on the Dutch market. Traders indicate that availability is limited.
Acoustic guitars	€ 25,785	165,376 pieces	2.0%	Not available	1.1%	Not available	Based on value: 1. USA (70.0%) 2. China (16.7%) 3. Indonesia (7.4%) Based on quantity: 1. China (66.2%) 2. USA (15.5%) 3. Indonesia (13.4%)	Species mentioned by the companies: mahogany, ebony and palissander. In addition tropical plywood is used.	- Benelly Import - EMD Music - EMP Music - Fender Musical Instruments GMBH - Gibson Europe - PB Music	Although FSC certified guitars are available on the market the interviewees indicated that no FSC or PEFC certified guitars in product ranges of the interviewed companies. One of the companies indicated to make use of FSC certified raw materials.
Amplified guitars	€ 38,815	126,345 pieces	3.0%	Not available	1.7%	Not available	Based on value: 1. USA (77.6%) 2. China (10.0%) 3. Indonesia (4.5%) Based on quantity: 1. USA (38.3%) 2. China (36.8%) 3. Indonesia (16.0%)			

⁴ Average over the period 2008-2011.

1. INTRODUCTION

Most attention in EU timber trade statistics is on primary timber products as these, for a long time, have been the most important type of timber products imported by EU countries. The imports of secondary timber products have however increased substantially during the last decades. The main reasons for the increase are the economic development in the countries or regions of origin of the products (e.g. China, South East Asia and South America), a shift of processing outside of the EU to low-cost countries and export bans for roundwood. As a result, secondary timber products should get more attention in timber trade analysis. There is however still a lot of work to be done. The large variety of products makes comparison between products, based on their weight or other measurement of quantity difficult, as reliable conversion factors lack. Therefore the import value is most often used as the measuring unit to present information on the developments in trade of secondary timber product.

For a number of reasons WWF Netherlands wants to increase their knowledge base on the secondary timber products trade to the EU in general and the Netherlands in particular:

1. The first aim of WWF Netherlands is to enhance sustainability in tropical timber flows from WWF Priority Places. The following priority places are relevant with regards to secondary timber products made from tropical timber: Amazon/Guianas, Borneo and Congo basin⁵. As tropical timber is used in a large number of secondary timber products, secondary timber products have to be taken into account, next to the primary timber products.
2. Secondly a number of secondary timber products (e.g. wooden seats and products of the printing industry) are exempted from the EU Timber regulation (EUTR). To be able to judge whether more products should be placed under the EUTR, information on e.g. the quantity and resource base of these products exempted from the EUTR is needed.
3. A third reason is to support WWF organisations in other countries (e.g. China) with data, e.g. to stress the importance of setting up instruments similar to the EUTR in their countries.
4. Finally, WWF wants to identify major Dutch importers of secondary timber products from outside of the EU to see if they need to be supported to increase responsible sourcing.

To increase their knowledge base WWF Netherlands asked Probos⁶ to study the imports of secondary timber products originating from outside the EU28 region (EU28-extra) by the EU28 in general and the Netherlands in particular. The results are presented in this report.

⁵ Please refer to http://wwf.panda.org/what_we_do/where_we_work/ for an overview of all WWF priority places.

⁶ Probos has a long track record in the analyses of timber trade statistics and the (Dutch) timber market.

Aim of the study

The overarching aim of the study is to give WWF Netherlands insight into the most important secondary timber products import streams to the EU in general and the Netherlands in particular. This concerns in particular products that fall outside the scope of the EUTR. The study should also, where possible, provide more information on which secondary wood products contain wood originating from WWF Priority Places.

Research question

What is the value of EU-extra imports of secondary timber products, which are the 5 largest countries within these imports and which are the 5 largest product groups, based on the EU-extra import value and what position does the Netherlands have within these EU-extra imports of secondary timber products?

This research question is divided into the following sub-questions:

- a) What is the share of secondary timber products within the total EU-extra trade of timber products (primary and secondary) based on value?
- b) Which are the 5 most important EU countries concerning the EU-extra imports of secondary timber products based on value (total, EUTR and non-EUTR)?
- c) Which are the 5 most important secondary timber products imported by the EU (total, EUTR and non-EUTR)?
 - What are the main countries of origin of these products (exporting countries)?
- d) What is the importance of the Netherlands concerning the imports of secondary timber products within the EU?
 - Which secondary timber products are most important for the Netherlands (based on their import value and if possible based on total quantity including transit trade, total excluding transit trade, EUTR and non-EUTR)?
- e) On which of the under sub question d) identified 5 secondary timber products should be focussed during the rest of the study?
- f) What information is available concerning the timber species used in the secondary timber products (and thus country / region of origin) for each of the 5 selected secondary timber products?
- g) To what extent are the 5 selected secondary timber products imported with a certificate for sustainable forest management?
- h) What are the main consumers or importers of the 5 selected secondary timber products in the Netherlands?

2. METHOD

2.1 Defining secondary timber products

At first secondary timber products were defined. Probos followed Eurostat and UNECE by using the Joint Forest Sector Questionnaire (JFSQ)⁷ as a reference. Secondary timber products are here defined as products derived from primary timber products (e.g. roundwood, sawnwood, wood based panels, woodpulp, paper and paperboard in sheets or rolls). The JFSQ deals with primary timber products and as such all timber products not covered by the JFSQ are considered as secondary. Wood based charcoal and wood pellets are an exception on this, as they are covered by the JFSQ but are considered to be secondary timber products in this study.

The Combined Nomenclature (CN)⁸ is used to identify secondary timber products within the EU trade statistics. Annex 1 contains an overview of the codes of the chapters from the CN which completely or partly cover primary and or secondary timber products. Under each chapter heading the CN codes corresponding to timber products, considered as secondary timber products within this study, are mentioned.

2.2 Trade data analysis

The trade data (EU-extra⁹ imports) used in this study to investigate the situation for the EU28 as a whole are derived from the Eurostat COMEXT database on international trade. For the part devoted to the Netherlands, the international trade database from Statistics Netherlands (CBS) is used. While interpreting and comparing the figures for the Netherlands from both data sources, it is important to realize that transit trade¹⁰ is not included in the database from CBS. This the main reason for using the CBS database instead of the COMEXT database to study the situation in the Netherlands. Another reason for using the CBS database, but of less importance, is the fact that the COMEXT database contains the preliminary trade date for especially the EU28-intra trade, making it less reliable. As the 2013 data in the CBS database was not yet available, data on the EU28 as a whole are presented for the period 2008-2013 and those for the Netherlands for the period 2008-2012.

The data in the results chapter are presented in value (1,000 Euro) and where possible in quantity (metric tons or another unit). While interpreting the results it should be kept in mind that the trade data have been treated as if they were flawless. Probos' experience in analysing international trade statistics learns however that flawless data do not exist. This study did however not allow for a plausibility check (e.g. unit price check) of the trade data. Probos

⁷ The Joint Forest Sector Questionnaire (JFSQ) on production and trade in wood and wood products. The JFSQ is part of a worldwide exercise in which Eurostat is responsible for the EU and EFTA countries. Partners are UNECE, FAO and ITTO.

⁸ The Combined Nomenclature is a coding system used for declaring goods to customs. All goods have an 8 digit code by which they can be identified. For more information please visit:

http://ec.europa.eu/taxation_customs/customs/customs_duties/tariff_aspects/combined_nomenclature/index_en.htm

⁹ Imports by the EU28 from outside the EU28 countries.

¹⁰ Two types of transit trade can be identified: 1. The goods are purchased by a Dutch citizen from a non-resident, followed by the sale of the goods to another non-resident without the goods entering the Netherlands. Therefore transit trade is not included in the international trade statistics. 2. Goods and products do enter a country, but there is no change of ownership within the country. In countries with large harbours, such as the Netherlands, the share of transit trade within the import figures in COMEXT can be quite significant.

expects the presented rankings of countries and product groups to be hardly affected by possible flaws in the trade data.

2.3 Product specific information

Five secondary timber products imported into the Netherlands are selected to be studied in more detail. The CBS database is used to get detailed information on the EU28-extra trade flows of the selected products in the Netherlands. Based on this detailed trade information a literature review and internet research has been performed for each of the 5 selected secondary timber products. To get a better understanding of the type of product, its properties and the major market players concerning these products, sector associations have been identified. The sector associations as well as the most important market players have been contacted by phone for an interview. During these interviews a standard list of questions has been used (see annex 6).

3. RESULTS DATA ANALYSES EU28

3.1 Share of secondary timber products in total EU28-extra imports

At first, the share of secondary timber products within the total value of EU28-extra imports of timber products have been determined. In order to account for differences between years the shares have been calculated for the period 2008-2013. The average share of secondary timber products within the period 2008-2013 is 49.9% (see table 3.1).

Table 3.1

Value of the EU28-extra imports for primary and secondary timber products and the shares of both product groups within the total EU28-extra imports (value in 1,000 Euro) Source: COMEXT database

Product group	2008	2009	2010	2011	2012	2013	Average
Primary	€ 17,052,615	€ 12,601,452	€ 16,412,812	€ 16,583,254	€ 15,213,580	€ 14,336,334	€ 15,366,674
Secondary	€ 15,866,854	€ 13,850,844	€ 15,762,849	€ 15,355,420	€ 15,777,229	€ 14,696,258	€ 15,218,242
Total	€ 32,919,468	€ 26,452,296	€ 32,175,660	€ 31,938,674	€ 30,990,808	€ 29,032,592	€ 30,584,916
Share primary	51.8%	47.6%	51.0%	51.9%	49.1%	49.4%	50.1%
Share secondary	48.2%	52.4%	49.0%	48.1%	50.9%	50.6%	49.9%

As a comparison, the share of primary and secondary timber products is calculated based on the quantity (in tons) of the EU28-extra imports of primary and secondary timber products. The results are shown in table 3.2. The average share of secondary timber products based on quantity differs significantly from the share in value and is just 18.6%.

Table 3.2

Quantity (in tons) of the EU28-extra imports for primary and secondary timber products and the shares of both product groups within the total EU28-extra imports (quantity in tons) Source: COMEXT database

Product group	2008	2009	2010	2011	2012	2013	Average
Primary	47,365,680	35,626,038	42,234,868	42,061,145	39,644,497	41,052,234	41,330,744
Secondary	7,244,468	7,960,043	9,135,932	9,592,589	10,401,006	12,012,229	9,391,045
Total	54,610,148	43,586,081	51,370,800	51,653,734	50,045,503	53,064,463	50,721,789
Share primary	86.7%	81.7%	82.2%	81.4%	79.2%	77.4%	81.4%
Share secondary	13.3%	18.3%	17.8%	18.6%	20.8%	22.6%	18.6%

3.2 EU28 main importing countries of secondary timber products

The import of secondary timber products by the EU28 has been analysed in order to identify the 5 largest importing EU countries of secondary timber products (in value). The top 5 countries for the year 2013 are presented in table 3.3. A complete overview of the ranking of the 28 EU member states for the years 2008-2013 is presented in annex 2, table a.

Table 3.3

Top 5 ranking of EU28 countries based on the total import value of secondary timber products for the year 2013 (Source: COMEXT database)

Ranking	Country	Value of import (in 1,000 Euro)
1.	United Kingdom	€ 4,593,883
2.	Germany	€ 2,584,318
3.	France	€ 1,567,615
4.	Netherlands	€ 1,222,435
5.	Italy	€ 830,953

Next to the ranking for the total import value, a ranking has also been made for the import value of secondary timber products under the EUTR and for the import value of secondary timber products exempted from the EUTR. The top 5 ranking is presented in the tables 3.4 and 3.5 respectively for the year 2013. The ranking for all EU28 countries is provided in annex 2 (tables b and c). The tables show that the top 5 countries are the same for all three ways of analysing. United Kingdom is the largest importer of secondary timber products, followed by Germany, France, the Netherlands and Italy.

Table 3.4

Top 5 ranking of EU28 countries based on the total import value of secondary timber products included under the EUTR for the year 2013 (Source: COMEXT database)

Ranking	Country	Value of import (in 1,000 Euro)
1.	United Kingdom	€ 2,412,175
2.	Germany	€ 1,249,054
3.	France	€ 821,395
4.	Netherlands	€ 587,197
5.	Italy	€ 495,254

Table 3.5

Top 5 ranking of EU28 countries based on the total import value of secondary timber products exempted from the EUTR for the year 2013 (Source: COMEXT database)

Ranking	Country	Value of import (in 1,000 Euro)
1.	United Kingdom	€ 2,181,708
2.	Germany	€ 1,335,265
3.	France	€ 746,220
4.	Netherlands	€ 635,238
5.	Italy	€ 335,699

3.3 Main secondary timber products within EU28-extra imports

The main secondary timber products imported by the EU28 based on value in 2013 are books with a total value of almost 1.7 billion Euro, followed by other seats with wooden frames. Packaging materials of paper and paperboard complete the top 3. Table 3.6 shows the top 10 of secondary timber products imported by the EU28 based on the import value.

Table 3.6

Top 10 ranking for secondary timber products imported by the EU28 in the year 2013 based on the total import value (in 1,000 Euro) (Source: COMEXT database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Books	€ 1,686,907
2.	Other seats, with wooden frames (upholstered and not)	€ 1,648,138
3.	Packaging of paper and board	€ 1,285,859
4.	Other furniture (excl. others specified)	€ 1,044,282
5.	Furniture for dining rooms and living rooms (excl. seats)	€ 960,775
6.	Wood pellets	€ 878,993
7.	Other articles of wood	€ 716,992
8.	Bedroom furniture (excl. seats)	€ 646,973
9.	Office articles	€ 426,114
10.	Assembled flooring panels	€ 397,547

The same ranking has been made for secondary timber products that are covered by the EUTR. Table 3.7 shows the top 10 for these products for the year 2013. Packaging of paper and board is the main secondary timber product imported by the EU28 that is covered by the EUTR. Three different types of furniture are within the top 5. Wood pellets are in fourth place.

Table 3.7

Top 10 ranking for secondary timber products covered by the EUTR and imported by the EU28 in the year 2013 based on the total import value (in 1,000 Euro) (Source: COMEXT database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Packaging of paper and board	€ 1,285,859
2.	Other furniture (excl. others specified)	€ 1,044,282
3.	Furniture for dining rooms and living rooms (excl. seats)	€ 960,775
4.	Wood pellets	€ 878,993
5.	Bedroom furniture (excl. seats)	€ 646,973
6.	Office articles	€ 426,114
7.	Assembled flooring panels	€ 397,547
8.	Doors and their frames and thresholds	€ 276,313
9.	Hygiene paper	€ 269,983
10.	Self-adhesive labels	€ 218,772

Books and other seats with wooden frames are by far the two largest secondary timber products imported by the EU28 that are exempted from the EUTR (table 3.8). It should be kept in mind that ‘other seats with wooden frames’, especially ‘upholstered’, consist of multiple materials for which wood is the frame. The top 3 is completed by other articles of wood. This is a rest group within the international trade statistics containing all kinds of timber products that cannot be allocated to one of the other categories. 10% of the value within this category of secondary timber products consists of products that contain fibre board.

Table 3.8

Top 10 ranking for secondary timber products exempted from the EUTR and imported by the EU28 in the year 2013 based on the total import value (in 1,000 Euro) (Source: COMEXT database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Books	€ 1,686,907
2.	Other seats, with wooden frames (upholstered and not)	€ 1,648,138
3.	Other articles of wood	€ 716,992
4.	Other printed matter	€ 295,214
5.	Printed or illustrated postcards	€ 230,277
6.	Charcoal	€ 204,335
7.	Newspapers, journals and periodicals	€ 203,834
8.	Statuettes and other ornaments, of wood	€ 163,624
9.	Tableware and kitchenware	€ 159,241
10.	Pictures, prints and photographs	€ 148,668

Annex 3 tables a, b and c contain the ranking for all secondary timber products that are imported by the EU28 based on value in Euros. The ranking is based on the year 2013, but import values are also presented for the years 2008-2012.

3.3 Countries of origin of the secondary timber products within EU28-extra imports

The countries of origin of the main secondary timber products that are imported by the EU28 have been determined. These countries of origin are presented for the top 10 of the products that are exempted from the EUTR. Amplified guitars, acoustic guitars and caskets and cases as separate categories are not in the top 10 of secondary timber products. These three secondary timber products have been added to this analysis for countries of origin because they are exempted from the EUTR and the wood used for the production of guitars in general might originate from WWF priority places. Figures 3.1 to 3.13 present the countries of origin based on the year 2013. In each figure the first ten countries are shown. The rest of the countries are grouped in the category others.

Figure 3.1

Countries of origin of books imported by the EU28 in 2013 based on import value (Source: COMEXT database)

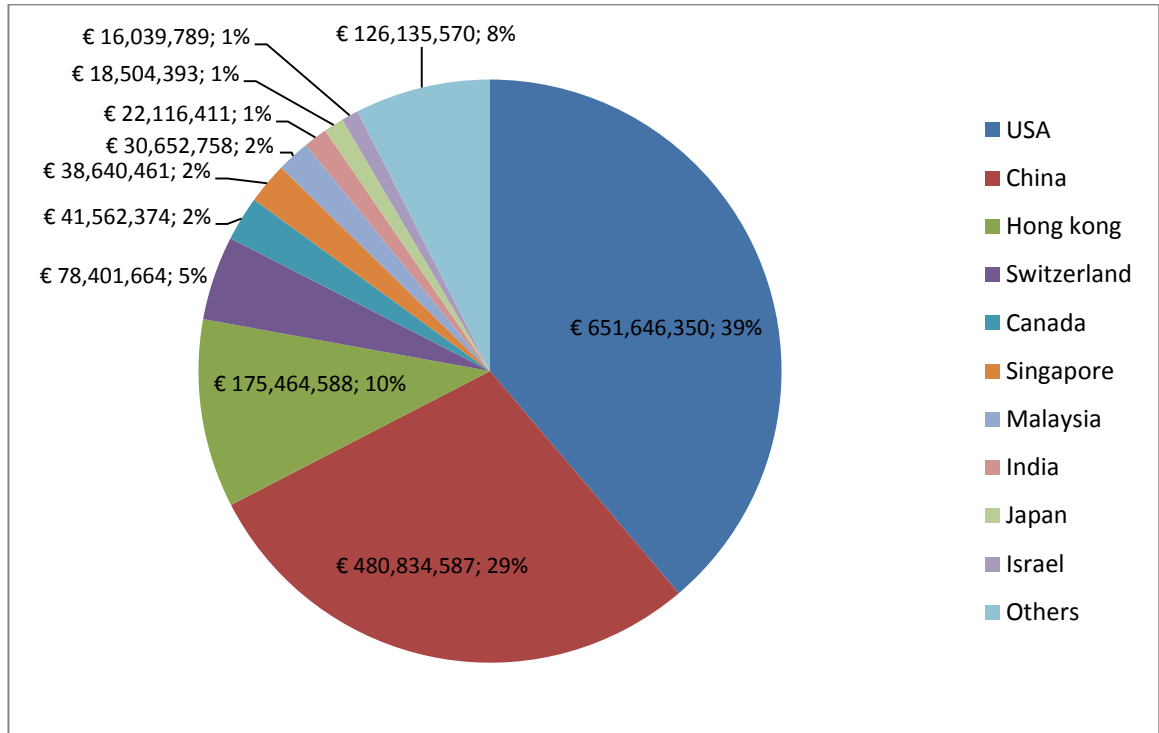


Figure 3.2

Countries of origin of other seats, with wooden frames (upholstered and not) imported by the EU28 in 2013 based on import value (Source: COMEXT database)

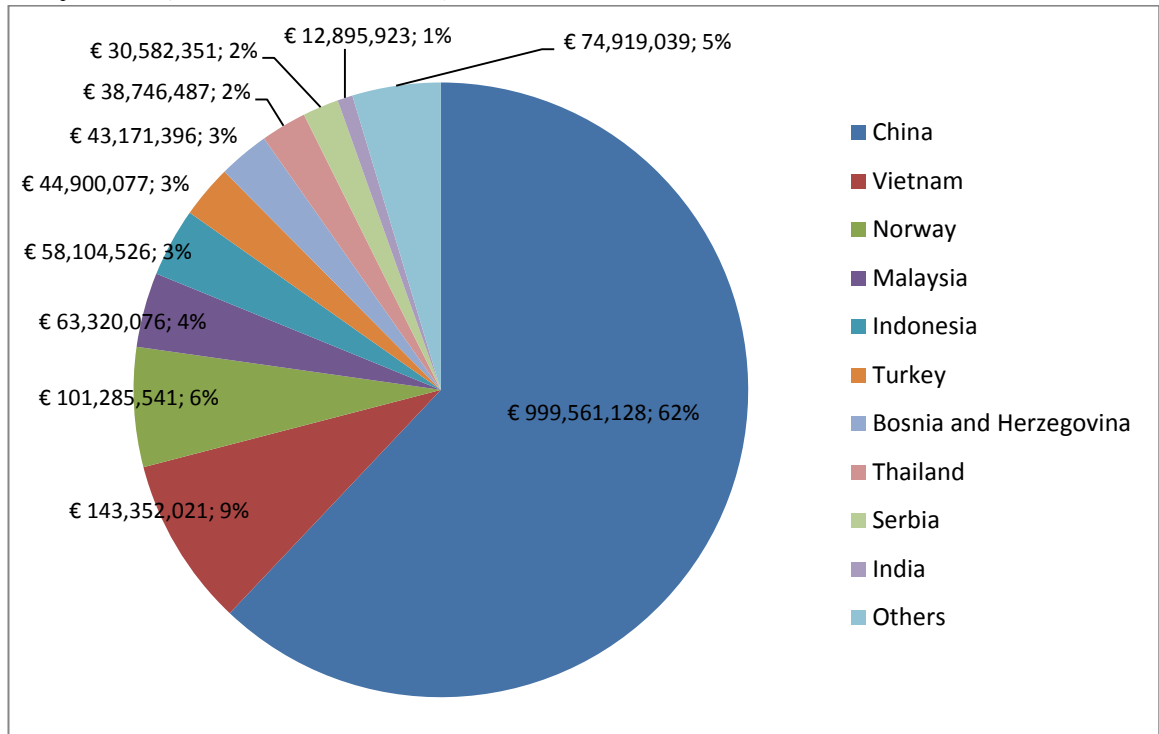


Figure 3.3

Countries of origin of other articles of wood imported by the EU28 in 2013 based on import value (Source: COMEXT database)

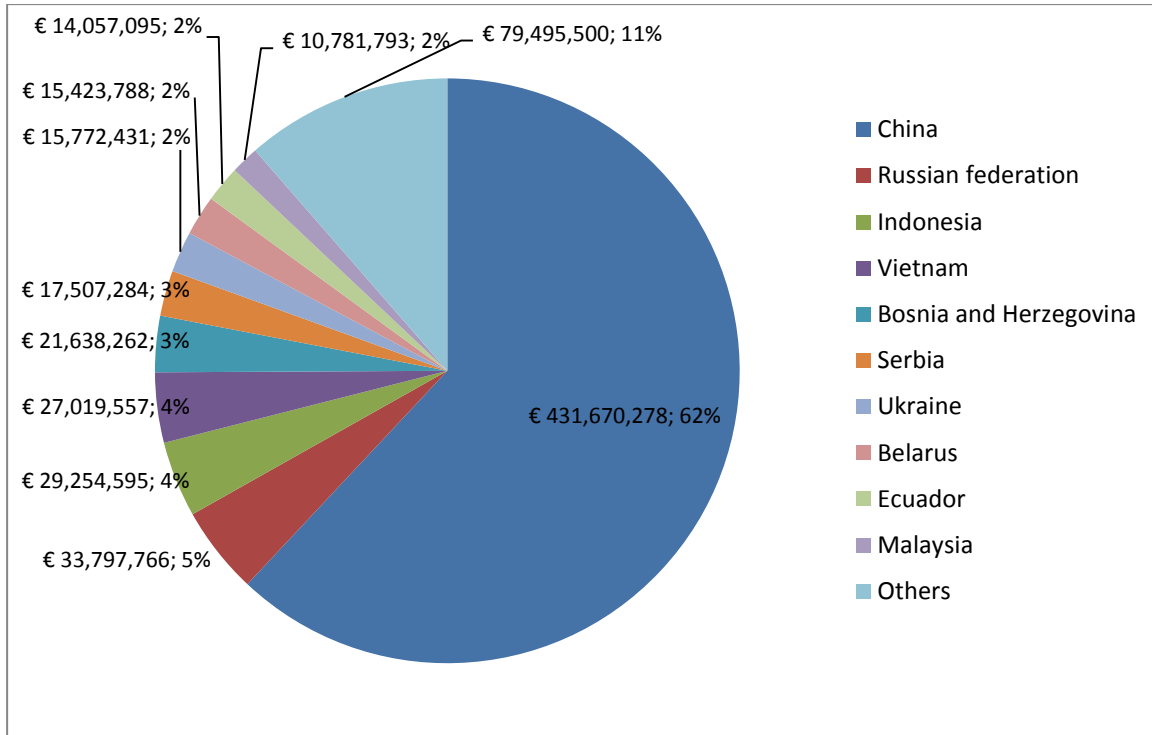


Figure 3.4

Countries of origin of other printed materials imported by the EU28 in 2013 based on import value (Source: COMEXT database)

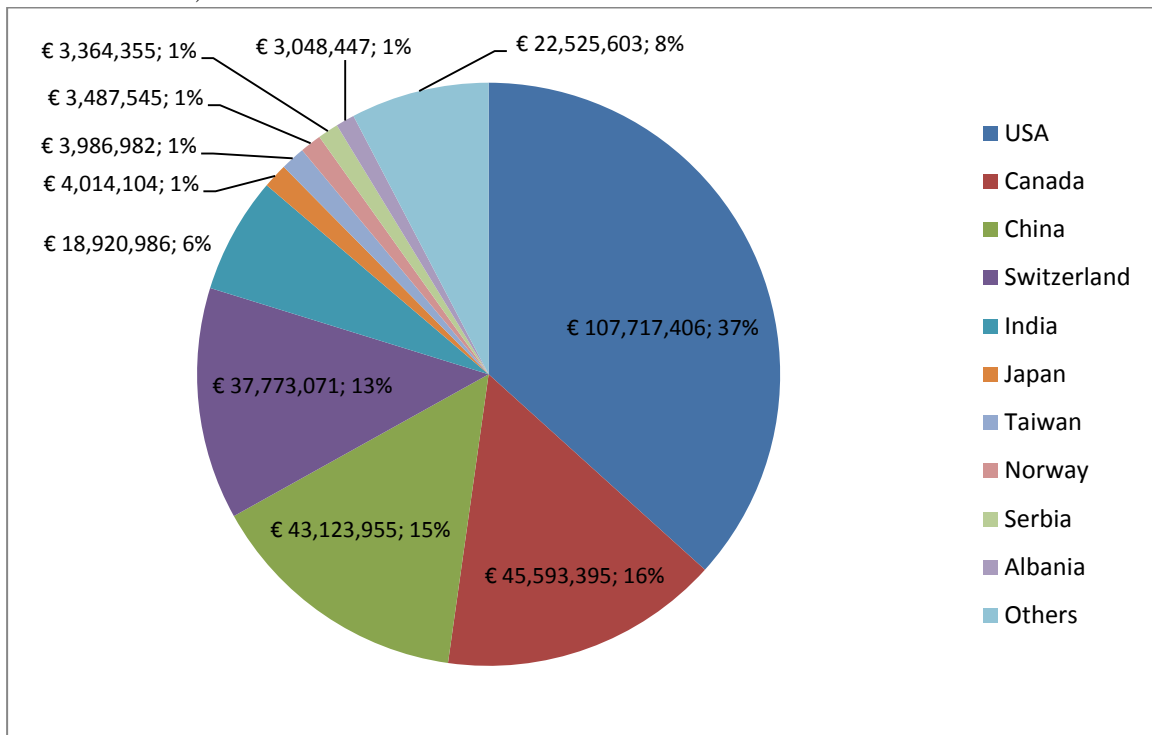


Figure 3.5

Countries of origin of printed or illustrated postcards imported by the EU28 in 2013 based on import value (Source: COMEXT database)

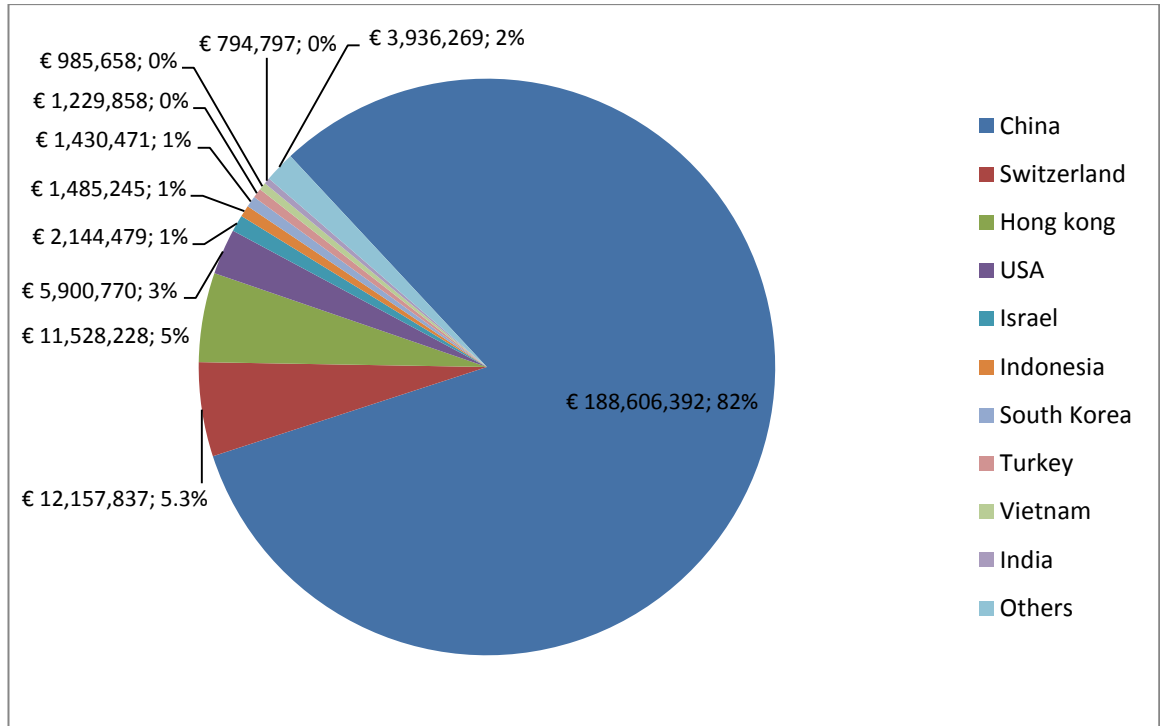


Figure 3.6

Countries of origin of charcoal imported by the EU28 in 2013 based on import value (Source: COMEXT database)

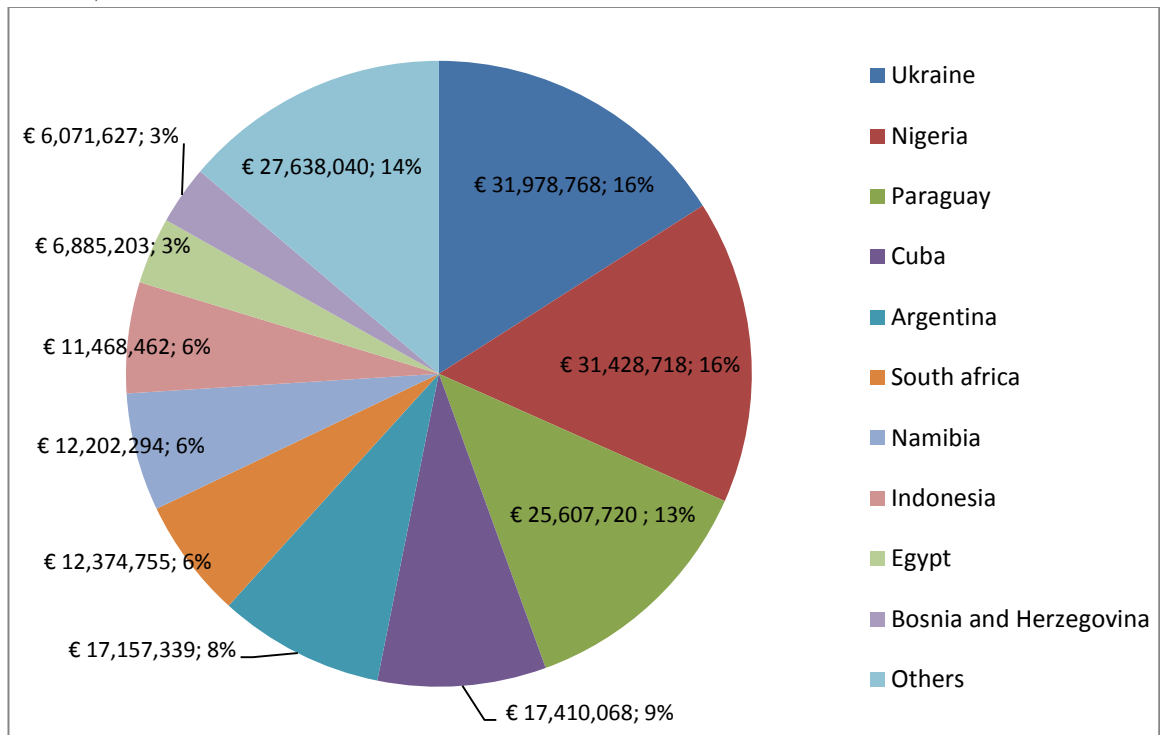


Figure 3.7

Countries of origin of newspapers, journals and periodicals imported by the EU28 in 2013 based on import value (Source: COMEXT database)

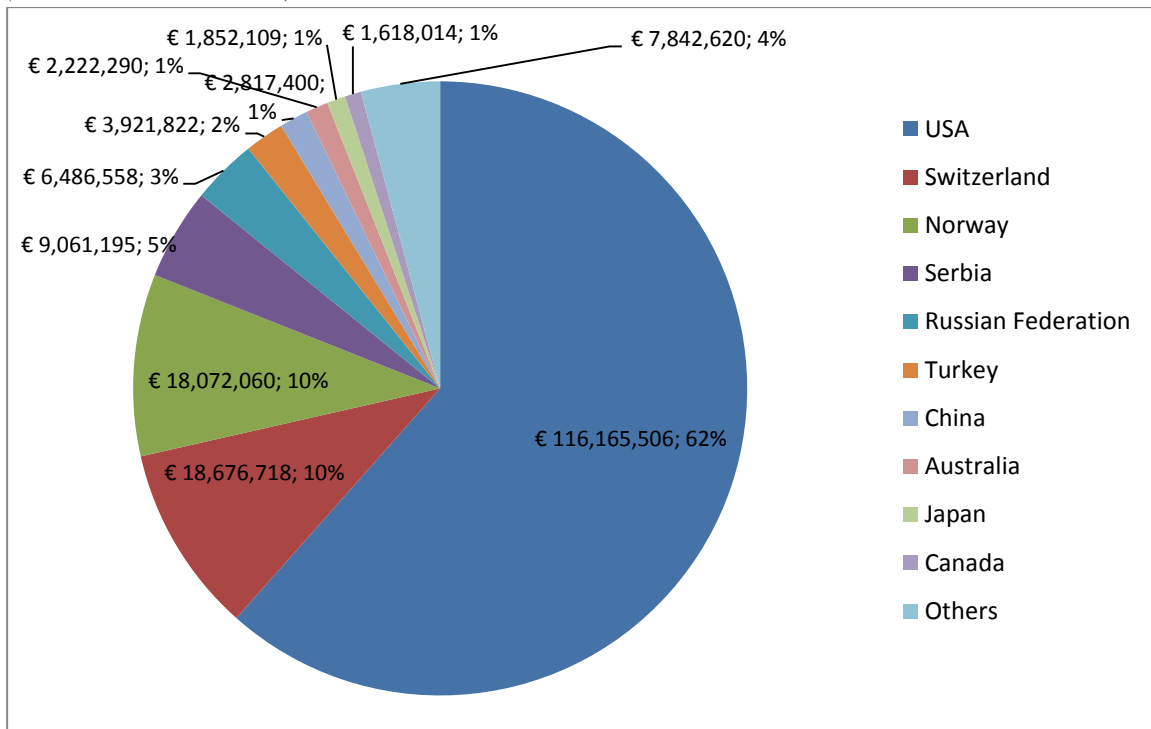


Figure 3.8

Countries of origin of statuettes and other ornaments, of wood imported by the EU28 in 2013 based on import value (Source: COMEXT database)

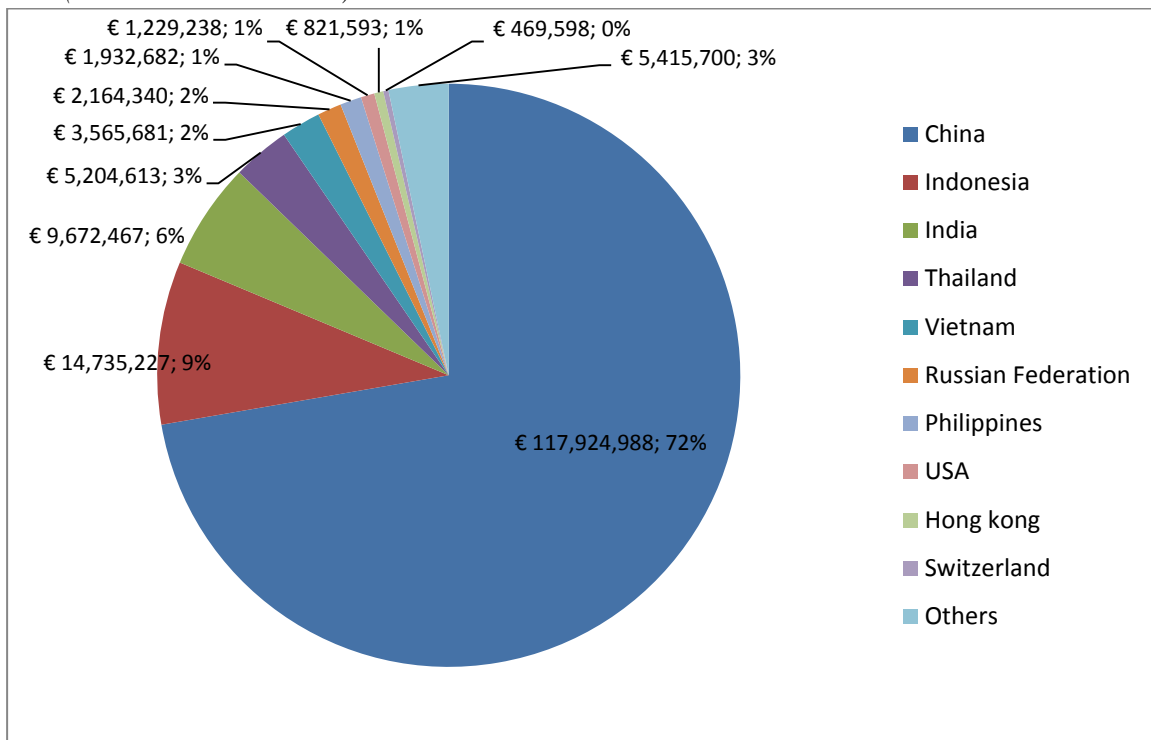


Figure 3.9

Countries of origin of tableware and kitchenware imported by the EU28 in 2013 based on import value (Source: COMEXT database)

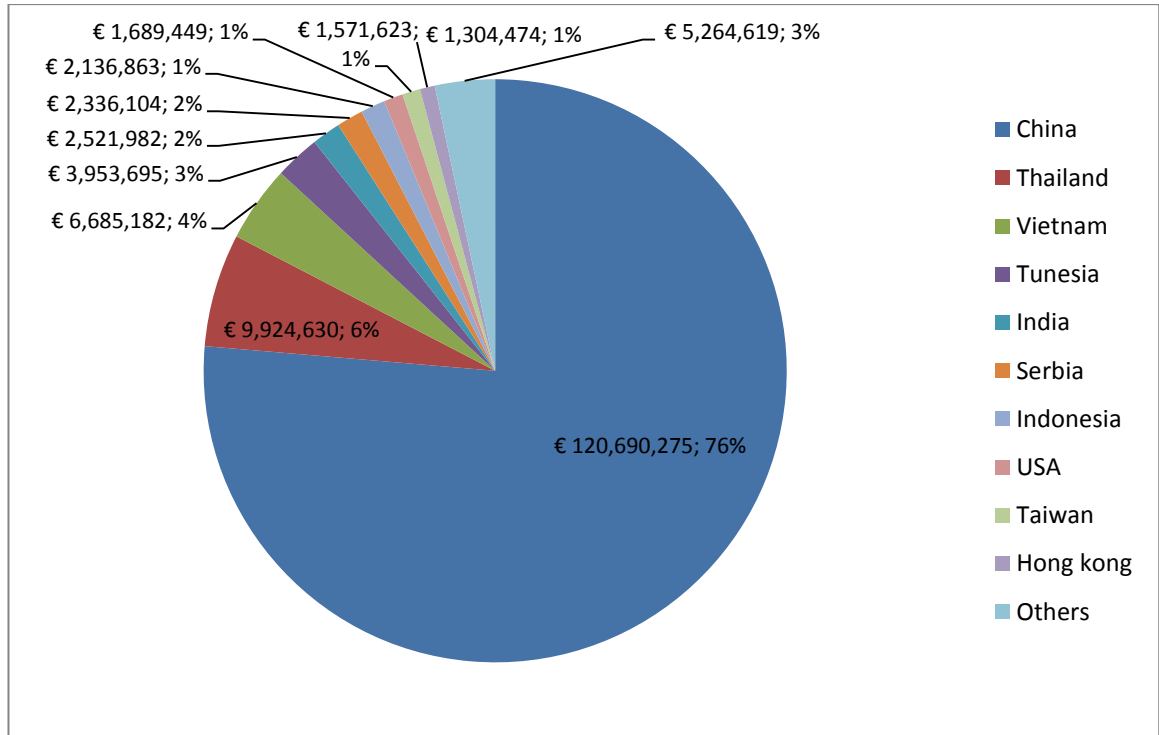


Figure 3.10

Countries of origin of pictures, prints and photographs imported by the EU28 in 2013 based on import value (Source: COMEXT database)

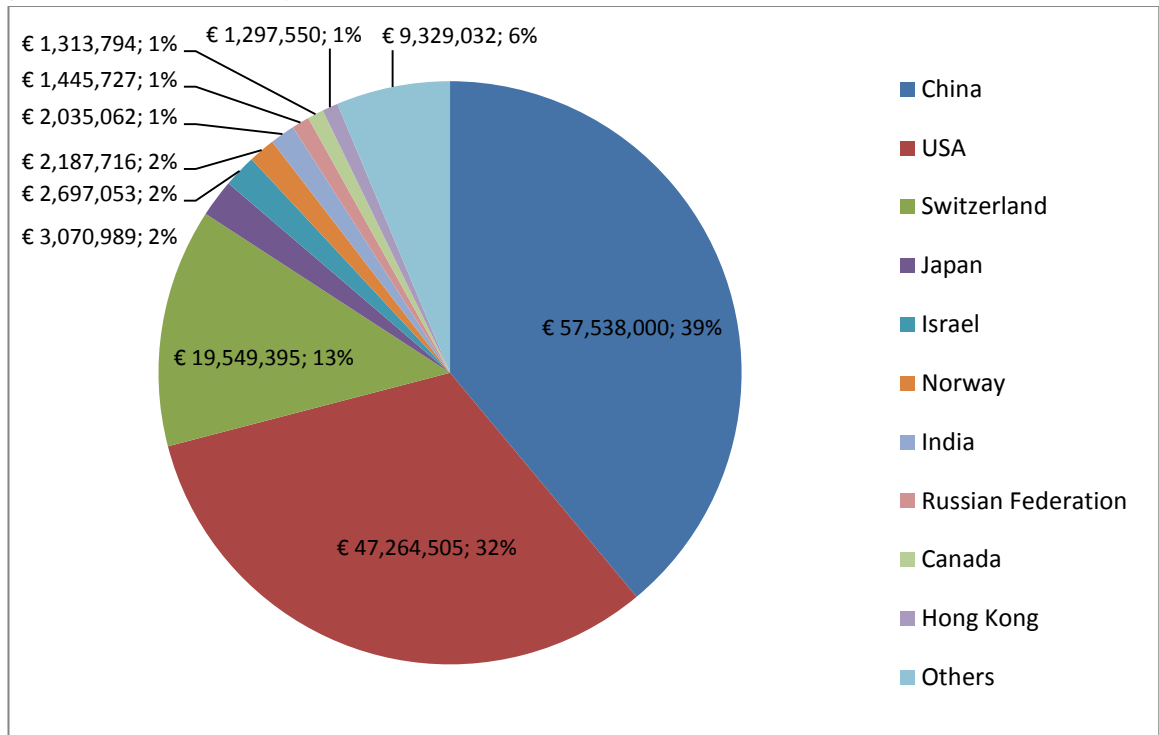


Figure 3.11

Countries of origin of amplified guitars imported by the EU28 in 2013 based on import value (Source: COMEXT database)

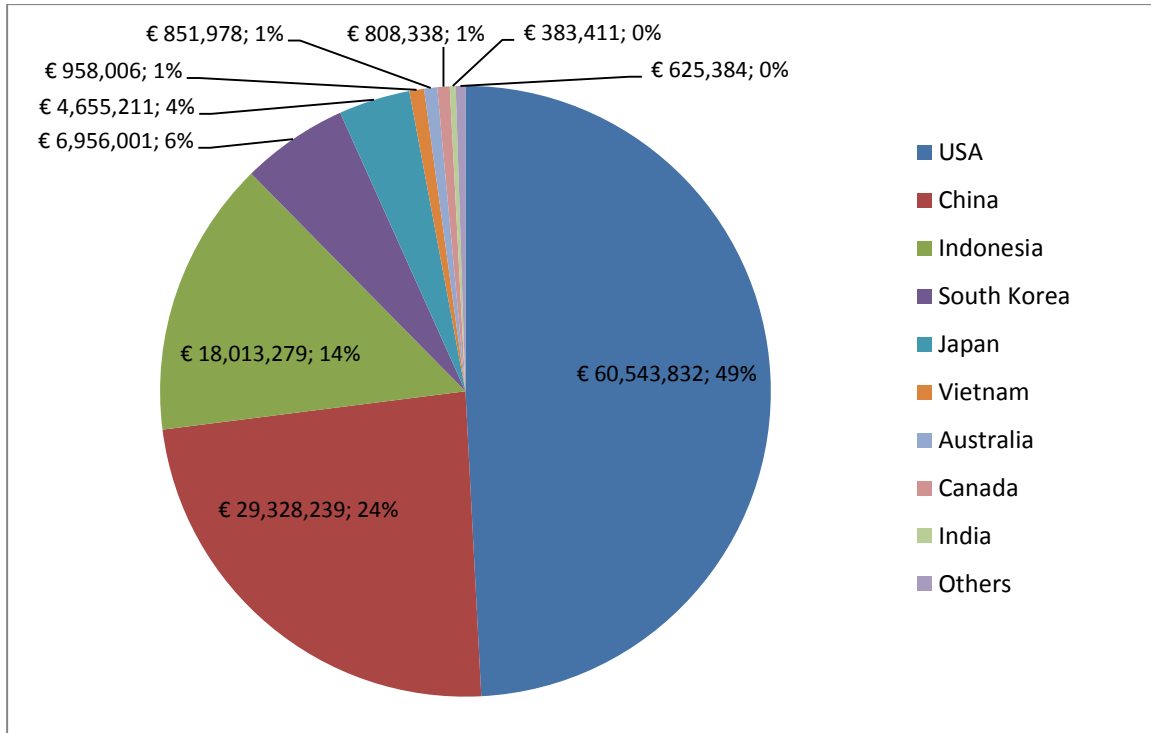


Figure 3.12

Countries of origin of caskets and cases imported by the EU28 in 2013 based on import value (Source: COMEXT database)

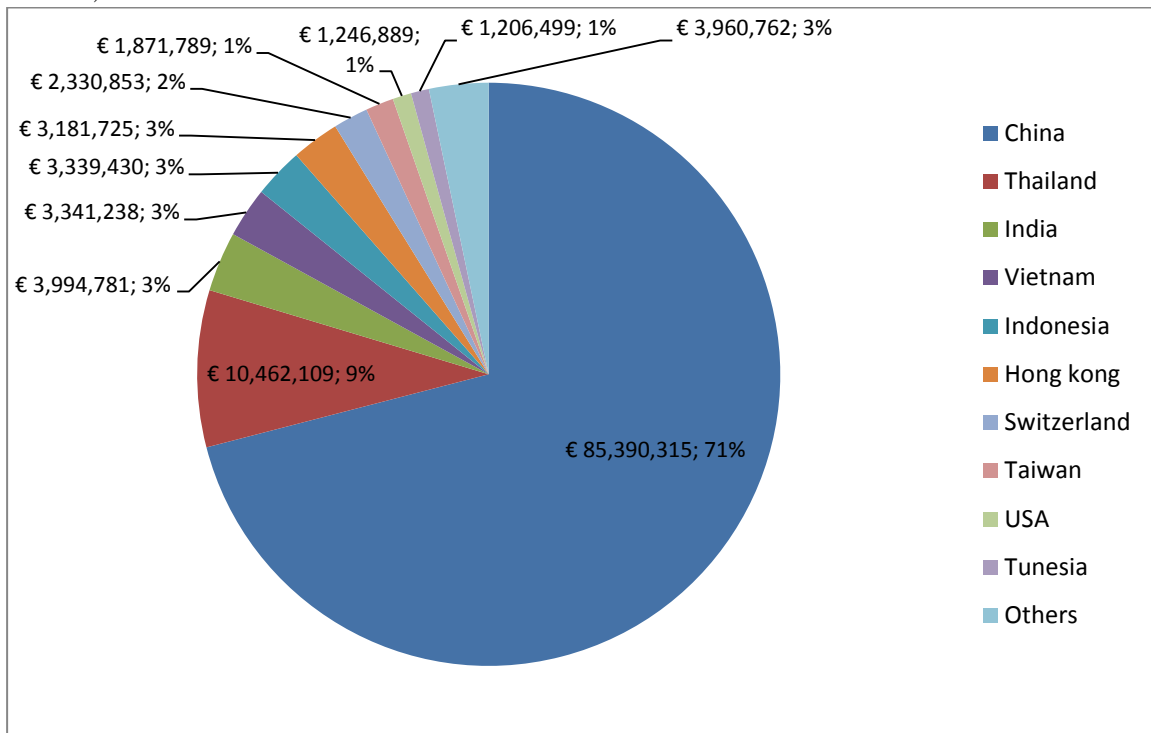
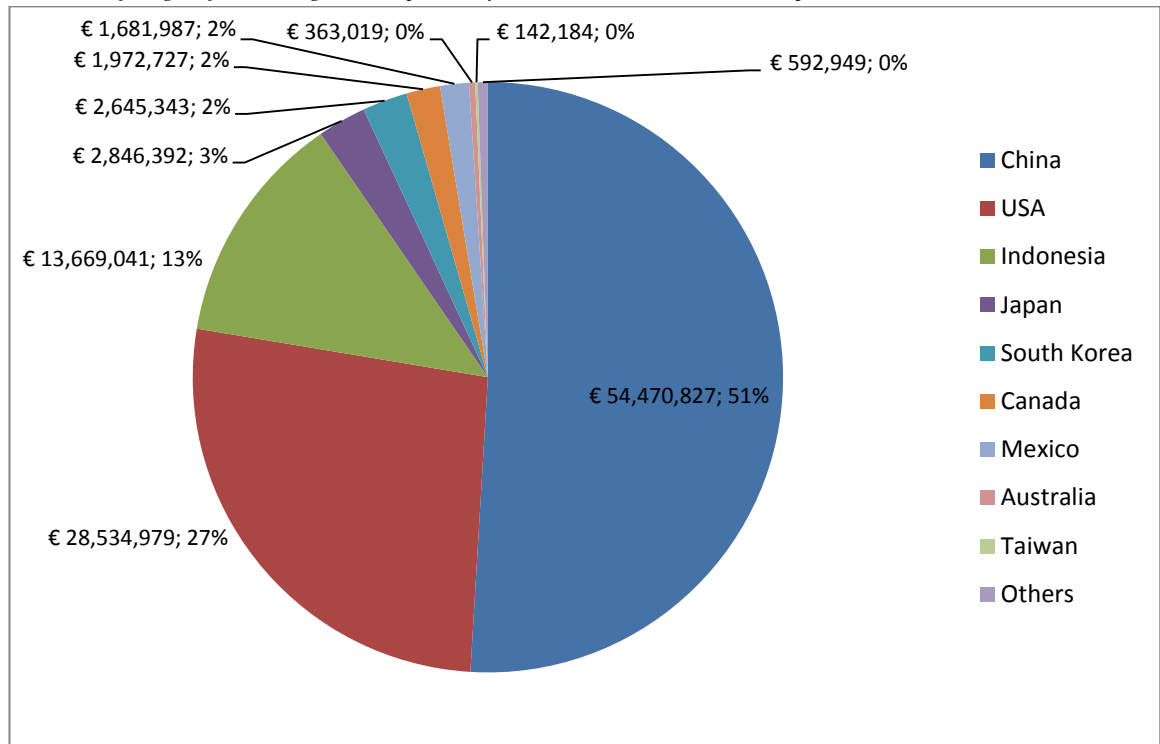


Figure 3.13

Countries of origin of acoustic guitars imported by the EU28 in 2013 based on import value.



4 RESULTS DATA ANALYSES THE NETHERLANDS

The former chapter dealt with the situation for the EU28 in total. In this chapter the same analysis is performed for the Netherlands. As mentioned, two different data sources are used: COMEXT database and the international trade database of Statistics Netherlands (CBS). The latter excludes transit trade. For this reason the figures from both databases should not be treated as comparable. The CBS database does not contain data for the year 2013 yet.

4.1 Share of secondary timber products in total EU28-extra imports

At first, the share of secondary timber products within the total value of EU28-extra imports of primary and secondary timber products is determined. The data for this analyses are derived from the COMEXT database as well as the CBS database. In order to account for differences between years the shares have been calculated for the period 2008-2013. The average share of secondary timber products within the period 2008-2013 is 44.1% based on COMEXT (table 4.1) and 56.1% based on CBS (table 4.2). The comparison between COMEXT and CBS data reveals an average transit trade (difference between the two databases) of 1.3 billion Euro over the period 2008-2012.

Table 4.1

Value of the EU28-extra imports for primary and secondary timber products and the shares of both product groups within the total EU28-extra imports by the Netherlands (value in 1,000 Euro) (Source COMEXT database)

Product group	2008	2009	2010	2011	2012	2013	Average ¹¹
Primary	€ 1,745,916	€ 1,250,315	€ 1,892,280	€ 1,964,850	€ 1,816,084	€ 1,559,815	€ 1,733,889
Secondary	€ 1,229,150	€ 1,249,056	€ 1,449,420	€ 1,401,795	€ 1,452,038	€ 1,222,435	€ 1,356,292
Total	€ 2,975,066	€ 2,499,371	€ 3,341,700	€ 3,366,645	€ 3,268,122	€ 2,782,250	€ 3,090,181
Share primary	58.7%	50.0%	56.6%	58.4%	55.6%	56.1%	55.9%
Share secondary	41.3%	50.0%	43.4%	41.6%	44.4%	43.9%	44.1%

Table 4.2

Value of the EU28-extra imports for primary and secondary timber products and the shares of both product groups within the total EU28-extra imports by the Netherlands (value in 1,000 Euro) (Source CBS database)

Product group	2008	2009	2010	2011	2012	2013	Average
Primary	€ 1,021,264	€ 706,554	€ 988,268	€ 994,662	€ 951,377	N/A	€ 932,425
Secondary	€ 1,072,398	€ 1,087,464	€ 1,245,849	€ 1,236,562	€ 1,292,661	N/A	€ 1,186,986
Total	€ 2,093,662	€ 1,794,018	€ 2,234,117	€ 2,231,224	€ 2,244,038	N/A	€ 1,766,176
Share primary	48.8%	39.4%	44.2%	44.6%	42.4%	N/A	43.9%
Share secondary	51.2%	60.6%	55.8%	55.4%	57.6%	N/A	56.1%

¹¹ For the period 2008-2012

4.2 Main secondary timber products within EU28-extra imports

The top 5 rankings in paragraph 4.1 show that the Netherlands is the fourth largest importer of secondary timber products within the EU28. These results are based on the COMEXT database and do for this reason include transit trade. Transit trade had an average share of 12.5% (app. € 170 million) within the total import value of secondary timber products of the Netherlands. This transit trade is not placed on the Dutch market and as such is not taken into account in the rest of this analysis.

Table 4.3 and 4.4 show the top 10 of secondary timber products imported by the Netherlands based on the import value from the COMEXT- and CBS database respectively. The top 6 products are the same for both databases although the values differ. Apparently transit trade results in the fact that amplified guitars and assembled flooring panels are within the top 10 based on COMEXT and outside the top 10 based on CBS.

The top 10 products (tables 4.3 and 4.4) have a share of approximately 63% within the total value of the EU28-extra imports of secondary timber products by the Netherlands in 2012. The share of the top 10 within the total EU28-extra import value for secondary and primary timber products is 28% based on the COMEXT database and 36% based on the CBS database in 2012.

Table 4.3

Top 10 ranking for secondary timber products imported by the Netherlands in the year 2012 based on the total import value (in 1,000 Euro) (Source: COMEXT database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Other seats, with wooden frames (upholstered and not)	149,269
2.	Wood pellets	127,807
3.	Books	124,056
4.	Furniture for dining rooms and living rooms (excl. seats)	116,234
5.	Other furniture (excl. others specified)	90,114
6.	Packaging of paper and board	78,781
7.	Guitars amplified	73,502
8.	Other articles of wood	67,901
9.	Office articles	52,277
10.	Assembled flooring panels	45,197

Table 4.4

Top 10 ranking for secondary timber products imported by the Netherlands in the year 2012 based on the total import value excluding transit trade (in 1,000 Euro) (Source: CBS database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Other seats, with wooden frames (upholstered and not)	133,434
2.	Wood pellets	127,788
3.	Books	106,302
4.	Furniture for dining rooms and living rooms (excl. seats)	104,344
5.	Other furniture (excl. others specified)	85,300
6.	Packaging of paper and board	69,300
7.	Other articles of wood	61,359
8.	Office articles	50,168
9.	Other printed matter	39,438
10.	Other paper and board products	38,929

The same ranking has been made for secondary timber products that are covered by the EUTR. Table 4.5 shows the top 10 for these products for the year 2012 based on the CBS database. Wood pellets is the main secondary timber product imported by the Netherlands that is covered by the EUTR. Two different types of furniture complete the top 3.

Table 4.5

Top 10 ranking for secondary timber products covered by the EUTR and imported by the Netherlands in the year 2012 based on the total import value (in 1,000 Euro) (Source: CBS database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Wood pellets	127,788
2.	Furniture for dining rooms and living rooms (excl. seats)	104,344
3.	Other furniture (excl. others specified)	85,300
4.	Packaging of paper and board	69,300
5.	Office articles	50,168
6.	Other paper and board products	38,929
7.	Assembled flooring panels	38,808
8.	Bedroom furniture (excl. seats)	30,916
9.	Other joinery products	25,749
10.	Doors and their frames and thresholds	24,099

Other seats with wooden frames and books are by far the two largest secondary timber products imported by the Netherlands that are exempted from the EUTR (table 4.6). As mentioned, upholstered seats can consist of multiple materials, but the frame is made from wood. The top 3 is completed by other articles of wood. This is a rest group within the international trade statistics containing all kinds of timber products that cannot be allocated

to one of the other categories. 10% of the value within this category of secondary timber products consist of products that contain fibre board. The top 10 of secondary timber products that are exempted from the EUTR had a share of almost 39% within the total EU28-extra import value of secondary timber products by the Netherlands in 2012. In total 46.5% of the EU28-extra import value of secondary timber products in the Netherlands in 2012 are exempted from the EUTR.

Table 4.6

Top 10 ranking for secondary timber products exempted from the EUTR and imported by the Netherlands in the year 2012 based on the total import value (in 1,000 Euro) (Source: CBS database)

Ranking	Product	Import value (in 1,000 Euro)
1.	Other seats, with wooden frames (upholstered and not)	133,434
2.	Books	106,302
3.	Other articles of wood	61,359
4.	Other printed matter	39,438
5.	Guitars amplified	38,815
6.	Statuettes and other ornaments, of wood	30,394
7.	Acoustic guitars	25,785
8.	Printed or illustrated postcards	24,516
9.	Tableware and kitchenware	21,790
10.	Newspapers, journals and periodicals	19,508

Annex 4 tables a, b and c contain the ranking for all secondary timber products that are imported by the Netherlands based on their value from the CBS database. The ranking is based on the year 2012, but import values are also presented for the years 2008-2011.

As a comparison the rankings above have also been made based on the EU28-extra imports quantity. The ranking of secondary timber products based on the import quantity (in tons), is presented in tables 4.8 to 4.10 below. The data are derived from the COMEXT database, as the CBS database does not contain these data in tons, and do for this reason include transit trade.

Table 4.7

The EU28-extra import quantities for primary and secondary timber products and the shares of both product groups within the total EU28-extra imports by the Netherlands (quantity in tons) (Source COMEXT database incl. transit trade)

Product group	2008	2009	2010	2011	2012	2013	Average ¹²
Primary	3,398,787	2,453,818	2,982,322	3,134,472	2,876,700	2,588,502	2,969,220
Secondary	508,062	1,240,705	1,473,544	1,265,046	1,315,143	881,077	1,160,500
Total	3,906,850	3,694,523	4,455,865	4,399,517	4,191,843	3,469,579	4,129,720
Share primary	87%	66%	67%	71%	69%	75%	72%
Share secondary	13%	34%	33%	29%	31%	25%	28%

Table 4.7 presents the totals (primary, secondary and overall) and the shares of the product groups within the total import quantity. Secondary timber products account for a share of app. 30% on average within the total EU28-extra import quantity of timber products by the Netherlands in the period 2008-2012.

Table 4.8

Top 10 ranking for secondary timber products imported by the Netherlands in the year 2013 based on the total import quantity (in tons) (Source: COMEXT database)

Ranking	Product	Import quantity (in tons)
1.	Wood pellets	494,376
2.	Other articles of wood	40,609
3.	Charcoal	35,832
4.	Furniture for dining rooms and living rooms (excl. seats)	33,764
5.	Other furniture (excl. others specified)	31,606
6.	Other seats, with wooden frames (upholstered and not)	28,705
7.	Packaging of paper and board	20,705
8.	Office articles	19,315
9.	Assembled flooring panels	18,082
10.	Bedroom furniture (excl. seats)	17,987

¹² For the period 2008-2012

Table 4.9

Top 10 ranking for secondary timber products covered by the EUTR and imported by the Netherlands in the year 2013 based on the total import quantity (in tons) (source: COMEXT database)

Ranking	Product	Import quantity (in tons)
1.	Wood pellets	494,376
2.	Furniture for dining rooms and living rooms (excl. seats)	33,764
3.	Other furniture (excl. others specified)	31,606
4.	Packaging of paper and board	20,705
5.	Office articles	19,315
6.	Assembled flooring panels	18,082
7.	Bedroom furniture (excl. seats)	17,987
8.	Wooden packaging	16,327
9.	Other joinery products	14,226
10.	Doors and their frames and thresholds	7,956

Table 4.10

Top 10 ranking for secondary timber products exempted from the EUTR and imported by the Netherlands in the year 2013 based on the total import quantity (in tons) (Source: COMEXT database)

Ranking	Product	Import quantity (in tons)
1.	Other articles of wood	40,609
2.	Charcoal	35,832
3.	Other seats, with wooden frames (upholstered and not)	28,705
4.	Books	16,013
5.	Statuettes and other ornaments, of wood	10,208
6.	Tableware and kitchenware	7,038
7.	Printed or illustrated postcards	4,480
8.	Caskets and cases	3,429
9.	Clothes hangers	3,307
10.	Children's picture, drawing or colouring books	3,042

4.3 Selected secondary timber products

Based on the EU28-extra trade of secondary timber products by the EU28 and the Netherlands as presented above and a set of selection criteria, 5 secondary timber products imported by the Netherlands were selected. The selection criteria have been determined by WWF Netherlands in cooperation with Probos. In random order these selection criteria are:

- a) The total value and/or quantity of the EU28-extra imports by the Netherlands;
- b) The product is exempted from the EUTR;
- c) The product is likely to originate from a WWF priority place;
- d) The country/region of origin of the product or the raw material (high-risk or not).

The 5 selected products are presented in table 4.11. This table includes an overview of the codes from the Combined Nomenclature (CN) that the product name refers to and the selection criteria that apply to the specific product. In the following sub-paragraphs the results of a more detailed study into each of these 5 selected secondary timber product is presented.

Table 4.11

The selected secondary timber products in random order

Product	CN codes	Applicable selection criterion
1. Other seats, with wooden frames (upholstered and not)	94016100 and 94016900	a, b and d
2. Books	49011000, 49019100 and 49019900	a, b and d
3. Packaging of paper and paperboard	48191000, 48192000, 48193000, 48194000, 48195000, 48196000, 48237010 and 48237090	a and d
4. Charcoal (including shell or nut charcoal)	44029000	a, b, c and d
5. Guitars (both acoustic and amplified)	92019030 and 92079010	b, c and d

An additional reason for selecting wood based charcoal is the strong link of charcoal production to forest degradation and deforestation in developing countries. As charcoal and fuelwood are the main energy source for heating and cooking¹³.

4.3.1 Other seats, with wooden frames (upholstered and not)

The product group of other seats with wooden frames consists of two different types of products:

- 1) upholstered seats with wooden frames; and
- 2) plain seats with a wooden frame (e.g. garden seats).

The total EU28-extra imports of this product group by the Netherlands accounted for more than 133 million Euro in 2012 and a total weight of more than 33,000 tons (CBS database). Upholstered seats had a share of 75% of the total import value and a share of 67% in the total import quantity in 2012 (table 4.12). In 2012 the EU28-extra imports accounted for

¹³ <http://blog.worldagroforestry.org/index.php/2013/10/03/unpacking-the-evidence-on-firewood-and-charcoal-in-africa/>

approximately 40% of the total import (€ 362,345,000) (both EU28-extra and EU28-intra) by the Netherlands within this product group¹⁴.

Table 4.12

EU28-extra import values and quantities of other seats with wooden frames (upholstered and not) by the Netherlands in the period 2008-2012 (source: CBS database)

Based on value (in 1,000 Euro)						
CN code	Description	2008	2009	2010	2011	2012
94016100	Upholstered seats with wooden frames	€ 86,598	€ 87,000	€ 92,553	€ 84,756	€ 100,728
94016900	Seats with wooden frames	€ 40,658	€ 37,575	€ 42,276	€ 31,434	€ 32,706
	Total	€ 127,256	€ 124,575	€ 134,829	€ 116,190	€ 133,434
94016100	Upholstered seats with wooden frames	68%	70%	69%	73%	75%
94016900	Seats with wooden frames	32%	30%	31%	27%	25%
	Total	100%	100%	100%	100%	100%
Based on quantity (in tons)						
CN code	Description	2008	2009	2010	2011	2012
94016100	Upholstered seats with wooden frames	21,268	21,590	22,361	20,089	22,207
94016900	Seats with wooden frames	14,822	13,921	15,354	12,402	11,099
	Total	36,090	35,511	37,715	32,490	33,307
94016100	Upholstered seats with wooden frames	59%	61%	59%	62%	67%
94016900	Seats with wooden frames	41%	39%	41%	38%	33%
	Total	100%	100%	100%	100%	100%

The countries of origin of the products have been studied too for the Netherlands. The results of this analysis are presented in the figures 4.1, 4.2 and 4.3. Based on value China is the main country of origin for the upholstered seats with wooden frames (74.4%) and within the total import (67.1%) (figure 4.1 and 4.2). For the other seats with wooden frames China is not as dominant, but still accounts for 44.9% within the import value, followed by Vietnam (24.8%) and Indonesia (17.3%) (figure 4.3). Based on the countries of origin of the other seats with wooden frames Probos assumes that garden seats make up a large share of this category. This is supported by the information received from Kwantum. Kwantum provided an overview of the products that were reported under the two CN codes for seats. From this overview it became clear what type of products are reported under each code. Under code 94016100 Upholstered seats with wooden frames, sofas, earchairs, upholsterd dining room chairs etc. are reported. Whereas under code 94016900 garden chairs and –benches as well as indoor furniture, such as dining room chairs and small wooden benches, are reported.

¹⁴ Source: CBS database

Figure 4.1

Countries of origin of upholstered and not upholstered seats, with wooden frames imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

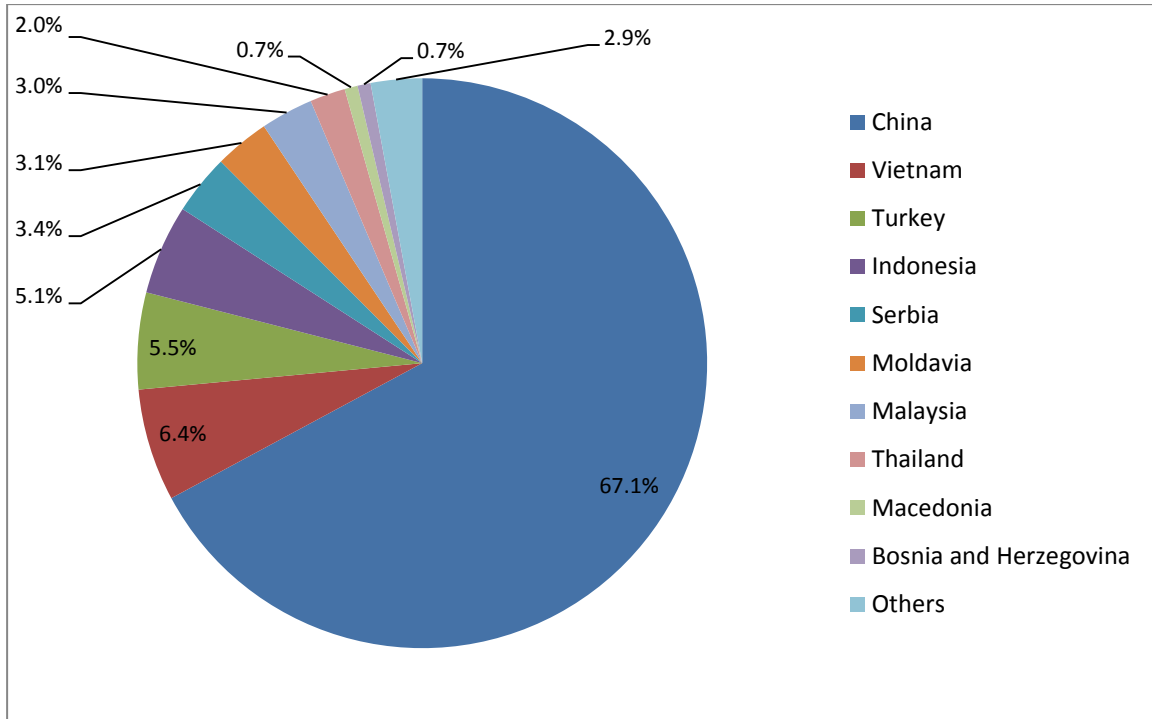


Figure 4.2

Countries of origin of upholstered seats, with wooden frames imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

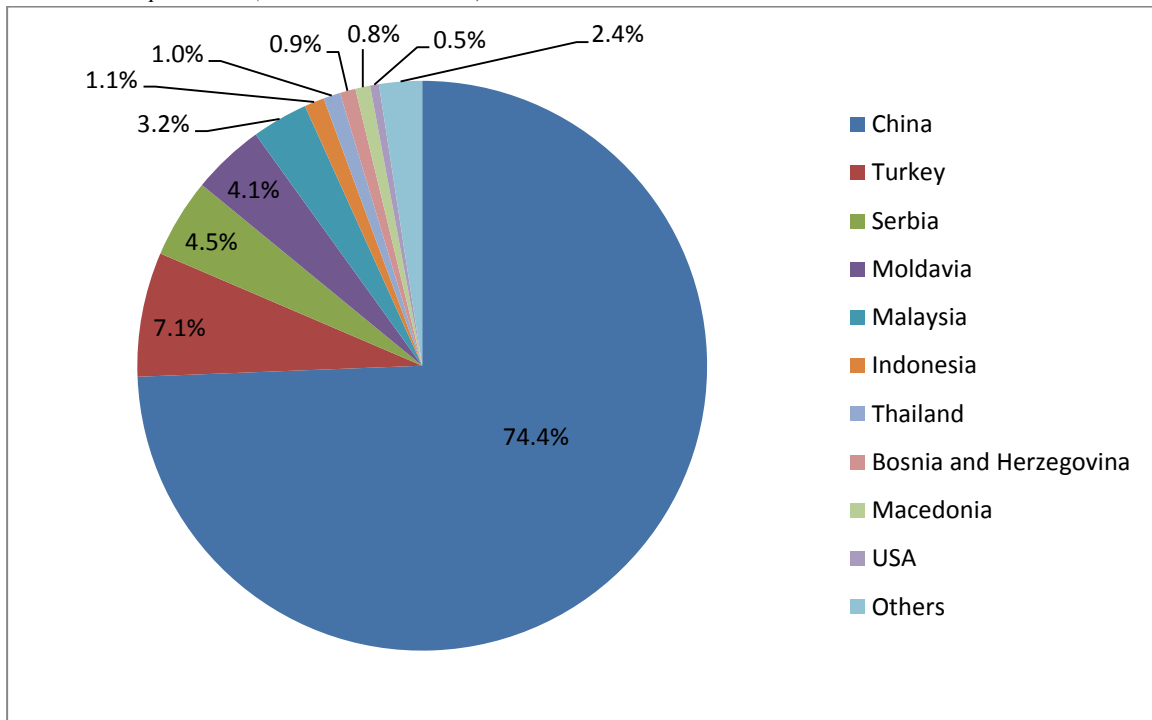
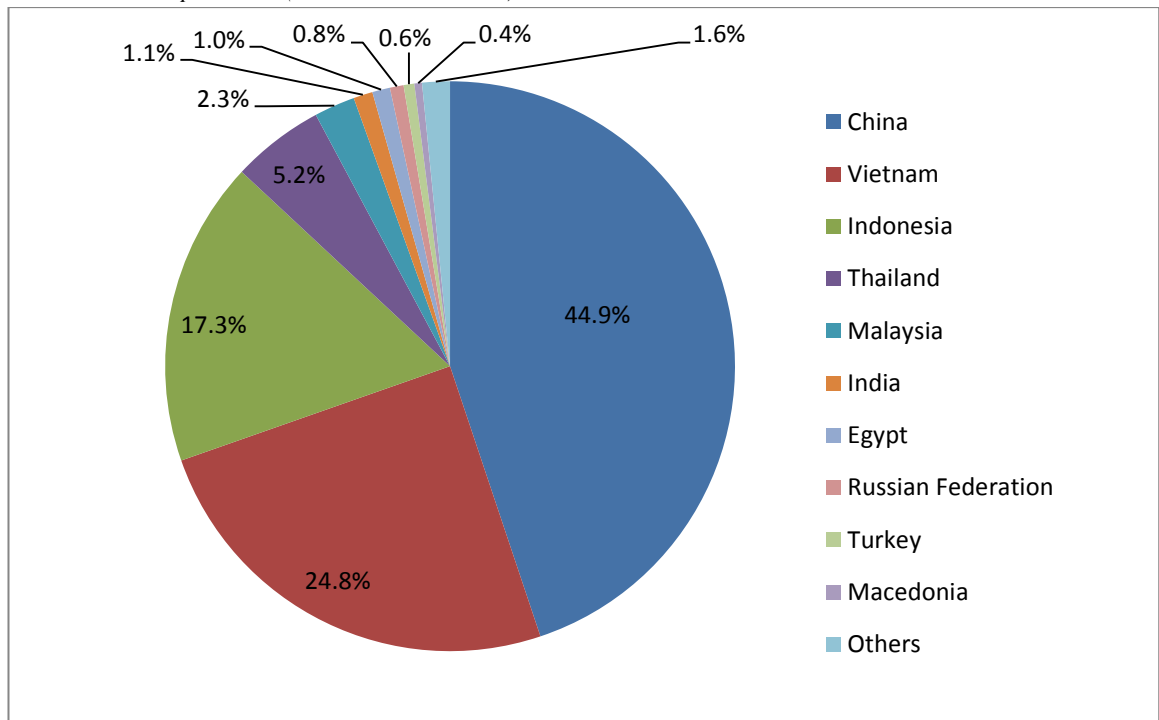


Figure 4.3

Countries of origin of seats, with wooden frames (excl. upholstered) imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)



Market structure and important market players

During the analyses to get a better understanding of the Dutch market for seats in general and those with a wooden frame in particular, it became clear that it is very difficult to distinguish seats from other types of furniture. Only a limited number of companies do exclusively sell seats.

As a first step in the analyses, sector associations were contacted. It was assumed that they would be able to provide more insight into the market for seats with wooden frames in the Netherlands and to point out the major actors on the market. Unfortunately the sector associations appeared unable to provide this type of information.

The royal CBM (association for interior- and furniture industry) is unable to provide information concerning the total market quantity of seats in the Netherlands. Next to this the majority of the members of the CBM do not import furniture, but produce furniture in the Netherlands themselves. Approximately 5 members are wholesalers of furniture, but according to the CBM the import quantities of these companies are negligible.

Sector association Inretail (former CBW-MITEX) represents 17,000 shops of entrepreneurs in the home furnishing- (interior articles such as furniture), fashion-, shoes- and sportswear market. The market for furniture (within home furnishing) in the Netherlands is one of the market segments in which their members are active. Inretail was able to provide a list of companies active in home furnishing (department stores and furniture specialists), but unable to provide more detail. The Inretail list contains companies that can be considered as major actors in the furniture market as they all have multiple outlets (ranging from 2 to 120) in the Netherlands. A list of these companies is included in annex 7.

During the contact with these two sector associations and importers of furniture it became clear that agents play an important role within the furniture sector. For this reason the VIA¹⁵ (association for furniture agents) was contacted. However they were not able to give insight into the general furniture market too. The VIA tried to collect this kind of information through their members, but so far the members are reluctant to provide such kind of data.

Garden furniture is a sub segment of the furniture market. A large share of the plain seats with wooden frames is expected to consist of garden furniture. For this reason the sector association B3¹⁶ was contacted. B3 represents the major manufacturers/importers of garden furniture in the Netherlands. These companies represent the most important brands of garden furniture on the Dutch market. The representative of B3 indicated that wooden garden furniture has lost market share during recent years mainly driven by the new trends in the garden furniture market. Within the turnover of the members of B3 wooden garden furniture has a share of approximately 10-15%. The total turnover is not shared. On top of this garden furniture produced and imported under private labels (e.g. by Kwantum, Intergamma, Ikea etc.), accounting for a large share of the Dutch garden furniture market, is not included in this turnover.

In addition, over 15 individual companies were contacted in order to get more detailed information on the market for wooden seats in the Netherlands and details on the type of timber used and shares of seats with a certificate for sustainable forest management. These companies ranged from large department stores, to indoor- and/or garden furniture specialists and specialists in seats. All companies were very reluctant to provide the requested information. It is important to meet face to face and ensure trust. Most of the companies indicated that they would be willing to engage in an interview at their office, but that option was not feasible within this study.

Some desk research has been performed in order to be able to provide some background information on the market for seats in the Netherlands.

Raw material use

Concerning the raw material use (Upholstered) seats are complex products. They should be considered as composite wood products as they most often consist of a variety of timber products (e.g. solid timber, veneer, particle board, fibre board, plywood etc.) and (can) contain more than one timber species. On top of this the timber used for upholstered furniture is to a large extent not visible at the outside. These properties are the main reason for excluding seats from the EUTR.

¹⁵ Vereniging Interieur Agenten

¹⁶ Branchevereniging Belangenbehartiging Buitenmeubelen en textiel.

Concerning wooden garden furniture durable timber species such as (plantation) teak, meranti, rubberwood and acacia are, in random order, the main timber species used for furniture that is imported from South East Asia. The contacted companies indicate that Indonesia, Thailand and Malaysia are the main countries of origin.

Interior furniture does not require the use of durable timbers as a consequence lightweight panel products such as MDF and particle board, temperate hard- and softwoods timber whether or not fitted with veneer or paper foil surfaces are used as raw material. Panels (MDF and particle board) are especially used for the production of upholstered furniture such as sofas. According to a Chatham house study¹⁷ a significant volume of Russian birch and oak may be used for furniture production in China. Although these timbers from Russia are replaced by increasing imports of temperate hardwoods from Europe and the USA and increasing use of domestic poplar and other plantation species. Tropical plantation species are used in Southeast Asia, including rubberwood (mainly in Malaysia and Thailand), plantation teak (mainly in Indonesia) and acacia (mainly in Malaysia and Indonesia).

Sustainability and legality

According to a Chatham house study¹⁸ the number of COC certificates issued to furniture manufacturers in countries like China, Vietnam, Indonesia, Malaysia, Thailand, India etc. is very limited for PEFC and relatively large for FSC. Indicating that the availability of furniture with a FSC certificate might be promising. The existence of COC certified companies doesn't tell anything about the actual trade in certified products by these COC certified companies. A COC certificate indicates the right and capacity of a company to handle certified material and to produce products thereof, but doesn't tell if the company actually does so and to what extent it does.

The interviews with companies dealing with garden furniture gave some indication that the share of FSC certified garden furniture might be increasing in the Netherlands. However, the market share of wooden garden furniture is reducing, but this is mainly driven by current prevailing fashion in garden furniture. The implementation of the EUTR might also play a role.

As seats are not covered by the EUTR, there is still a risk of importing illegally sourced timber through wooden seats. According to an analysis¹⁹ of George White for WWF Netherlands 90% of the total value of imports of wood based seats originate from countries that have acknowledged issues of illegal logging or trade. This does however not mean that 90% of the import value consists of seats containing illegally logged timber.

¹⁷ Oliver, R., 2013. Imports of Composite Wood Products into the EU and Implications for the EU Timber Regulation, Furniture sector Focus. Energy, Environment and Resources EER PP 2013/06, Chatham House, London

¹⁸ Saunders, J., 2014. Certified Products and EUTR Compliance in the furniture sector. Energy, Environment and Resources EER PP 2014/09, Chatham House, London

¹⁹ White, G., 2014. Netherlands' imports of major timber and fibre product groups that are exempt from the EU Timber Regulation, George White Associates, Melton, United Kingdom

4.3.2 Books

The product group books consists of three different types of products:

- 1) The first category is described as “printed books, brochures, leaflets and similar printed matter: In single sheets, whether or not folded”.
- 2) The second category refers to “dictionaries and encyclopaedias, and serial instalments thereof”.
- 3) The third and largest category is described as “other books”.

The total EU28-extra imports of the product group books by the Netherlands accounted for over 106 million Euro in 2012 and a total weight of almost 16,000 tons. Other books had a share of 64% within the total value and a share of 93% in the total import quantity in 2012 (table 4.13). In 2012 the EU28-extra imports accounted for approximately 31% of the total import (€ 346,013,000) (both EU28-extra and EU28-intra) by the Netherlands within this product group²⁰.

Table 4.13

EU28-extra import values and -quantities of books by the Netherlands in the period 2008-2012 (source: CBS database)

Based on value (in 1,000 Euro)						
CN code	Description	2008	2009	2010	2011	2012
49011000	Printed books, brochures, leaflets and similar printed matter: In single sheets, whether or not folded	€ 30,103	€ 21,348	€ 29,682	€ 40,017	€ 38,245
49019100	Dictionaries and encyclopaedias, and serial instalments thereof	€ 1,046	€ 316	€ 1,044	€ 477	€ 141
49019900	Other books	€ 67,199	€ 68,828	€ 67,829	€ 65,244	€ 67,916
Total		€ 98,348	€ 90,492	€ 98,555	€ 105,738	€ 106,302
49011000		31%	24%	30%	38%	36%
49019100		1%	0%	1%	0%	0%
49019900		68%	76%	69%	62%	64%
Total		100%	100%	100%	100%	100%
Based on quantity (in tons)						
CN code	Description	2008	2009	2010	2011	2012
49011000	Printed books, brochures, leaflets and similar printed matter: In single sheets, whether or not folded	3,086	1,048	725	954	994
49019100	Dictionaries and encyclopaedias, and serial instalments thereof	313	65	385	192	32
49019900	Other books	14,803	17,155	18,738	17,288	14,657
Total		18,202	18,268	19,848	18,434	15,683
49011000		17%	6%	4%	5%	6%
49019100		2%	0%	2%	1%	0%
49019900		81%	94%	94%	94%	93%
Total		100%	100%	100%	100%	100%

²⁰ Source: CBS database

The figures 4.4 to 4.9 show the analysis of the countries of origin of the total EU28-extra import by the Netherlands and for the different categories of books. Based on value the USA is the main country of origin for books (45.6%), followed by China with a share of 34.6% (figure 4.4). This situation is turned around if analysis is based on the quantity. In that case China is by far the largest country of origin with a share of 71.2% (figure 4.5).

Figure 4.4

Countries of origin of books imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

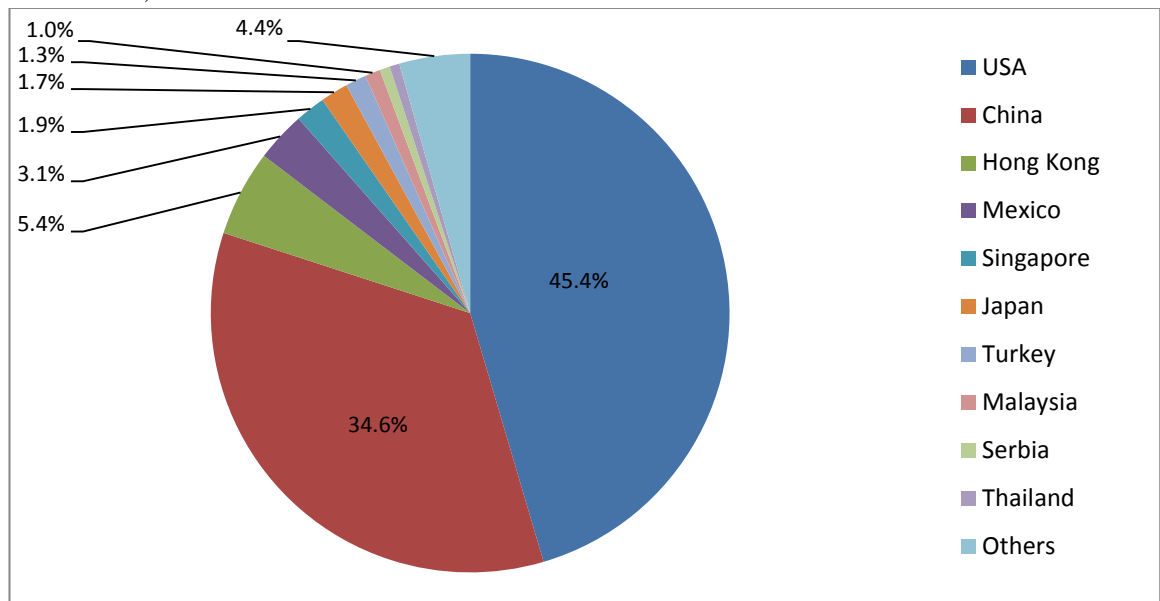
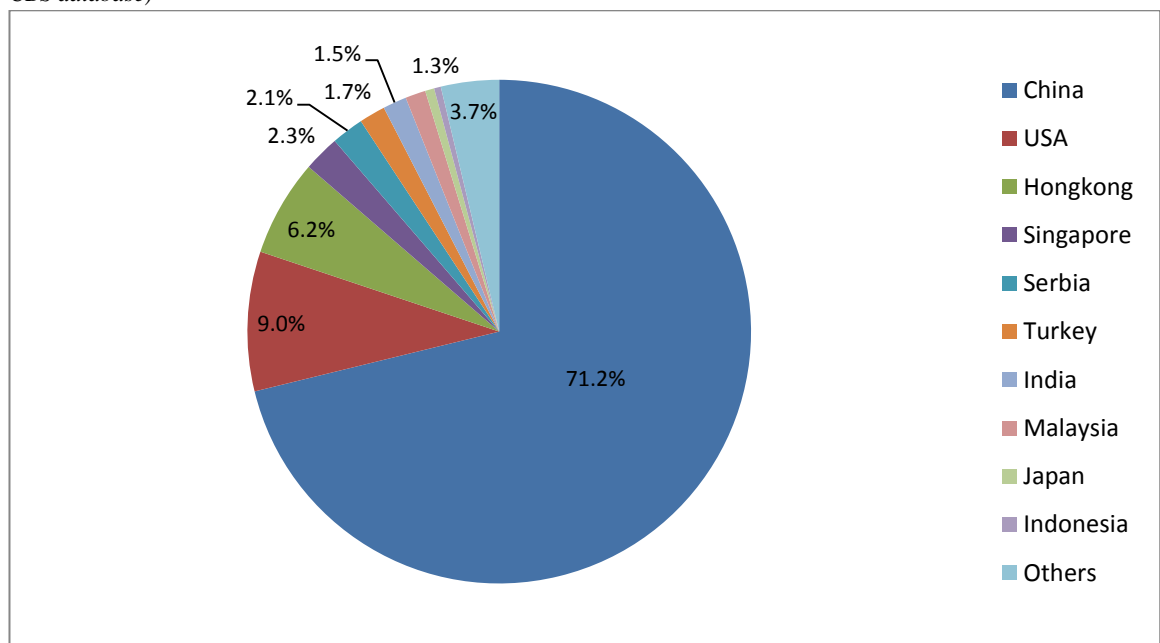


Figure 4.5

Countries of origin of books imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)



For the category ‘printed books, brochures, leaflets and similar printed matter: in single sheets, whether or not folded’, the USA is the main country of origin based on value with a share of 72% (figure 4.6). If the import quantity is taken as a starting point Serbia is the main country of origin with a share of 28.5%, followed by China (22.4%) and the USA (18.6%) (figure 4.7).

Figure 4.6
Countries of origin of printed books, brochures, leaflets and similar printed matter: in single sheets, whether or not folded imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

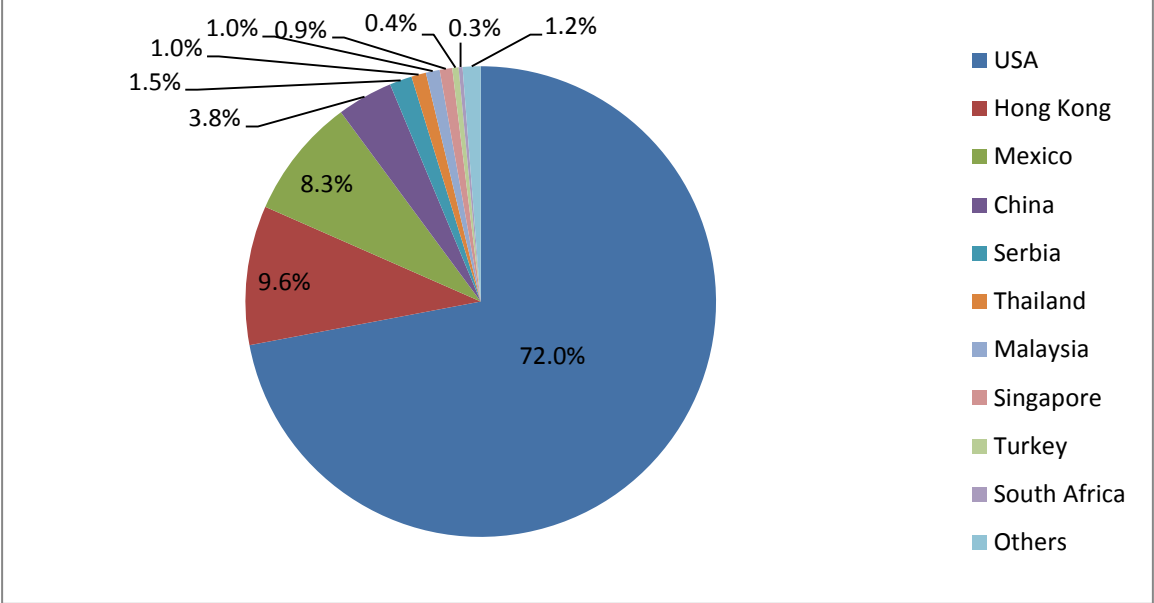
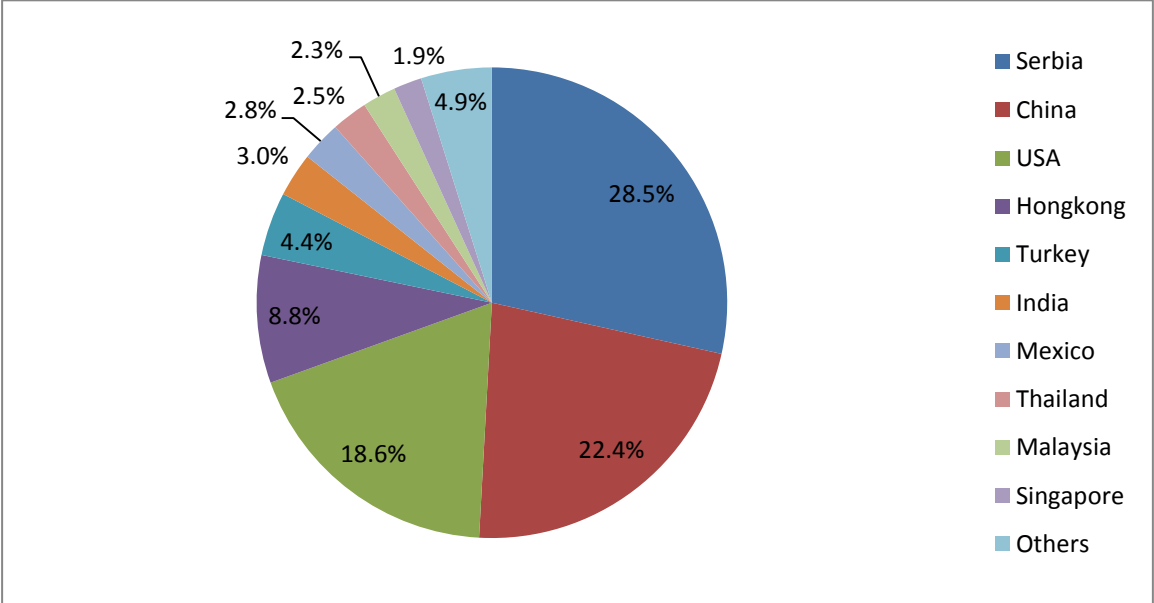


Figure 4.7
Countries of origin of printed books, brochures, leaflets and similar printed matter: in single sheets, whether or not folded imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)



As the total import value and quantity of the category dictionaries etc. represents a very small part of the total, the countries of origin of this product category have not been put into graphs. In value terms Hong Kong is the main country of origin and China if the quantity is used.

In the category ‘other books’ China is the main country of origin based both on value as quantity (figure 4.8 and 4.9). The number one position is most clear when looking at the import quantity (74.6%). The share of the USA is 30.6% based on value and 8.3% based on quantity. This is a large difference. A possible explanation might be that the development costs (writing, editing, layout etc.) of the books are included in the books that are imported from the USA. In contrast most of these developing costs are not applicable to the books imported from China as these cost are to a large extent made by the publishers in the Netherlands. The publishers sends the ready to print version to China where the book is actually printed.

Figure 4.8

Countries of origin of other books imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

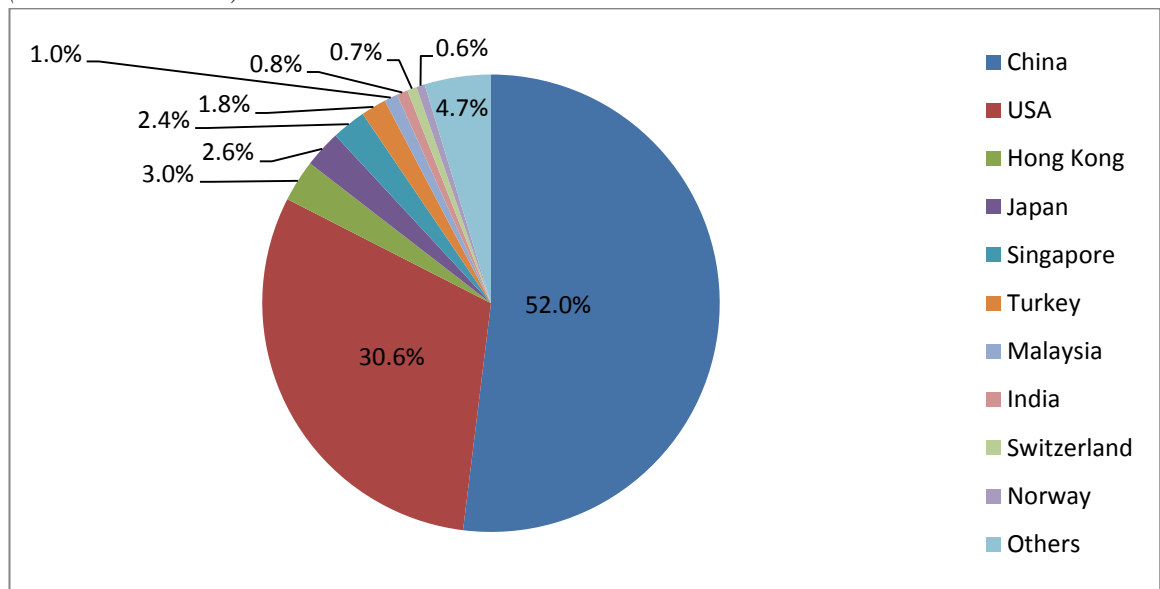
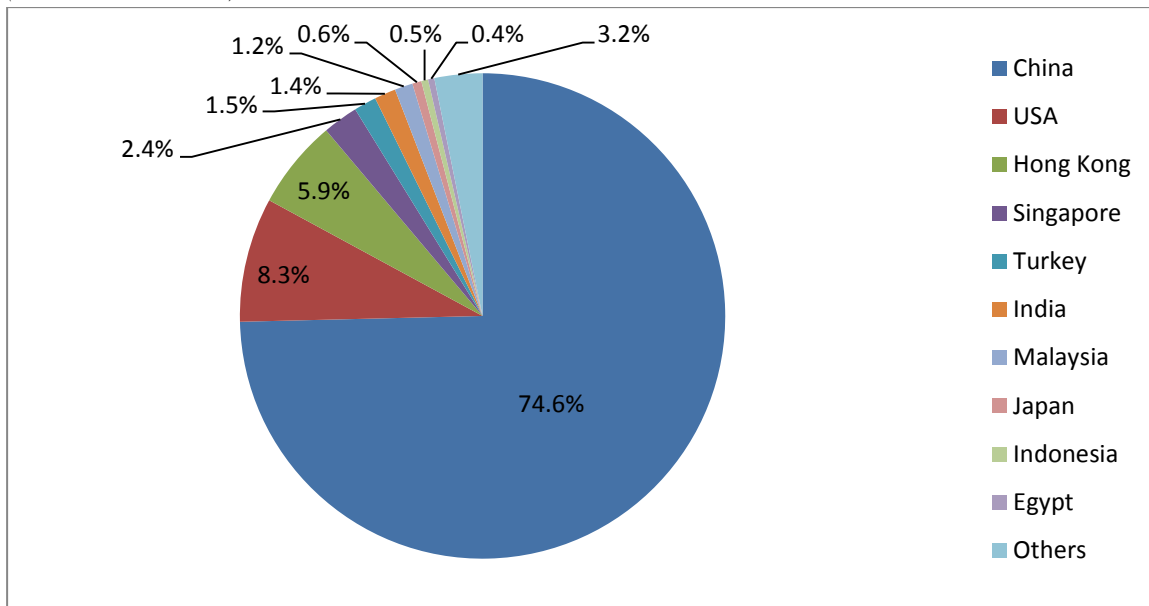


Figure 4.9

Countries of origin of other books imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)



Market structure and important market actors

The book publishing sector in the Netherlands consists of a small number of large publishers and a large variety of small publishers. The exact number of book publishing companies in the Netherlands is however not known. In general there were 1860 publishing companies for books in 2013²¹ of which 95% have less than 10 employees. Many of the larger publishers of books are organised in publishing concerns, of which WPG Uitgevers B.V. and LannooMeulenhoff are the two largest on the Dutch market for books. These companies are mainly administrative collaborations. Interviews with these companies revealed that the import of books is done by each individual publishing company and not by the collaborative. The Nederlandse Uitgeversbond (NUV) is the most important sector association for the publishing sector in the Netherlands. They have been interviewed for this study.

Among the major publishers in the Netherlands are:

- Uitgeverij Meulenhoff Boekerij
- A.W. Bruna Uitgevers B.V.
- Uitgeverij Nijgh & Van Ditmar
- TerraLannoo BV Uitgeverij
- Uitgeverij Unieboek | Het Spectrum BV
- Querido's Uitgeverij BV
- Uitgeverij De Bezige Bij BV
- Wolters Kluwer NV
- Koninklijk Boom uitgevers B.V.

²¹ CBS statline, Centraal Bureau voor de Statistiek, Den Haag/Heerlen 22-7-2014

Most of these publishers have been approached by phone for an interview.

The turnover in the book selling branch has been declining since 2009. For example by 7.3% in 2012 and 5.5% in 2013²². This trend is expected to continue, especially where it concerns novels. The number of books per print, when looking at novels, has therefore become smaller. Once the sales of a book are going well, reprints are produced. In order to be able to have a short supply time to the shops, reprints have to be delivered on a very short term. With this working method companies have to be able to respond quickly to positive sales and therefore production lines have to be short. As a result most novels, except maybe for some beforehand known best-sellers, are produced within EU-countries.

According to the NUV most of the import volume from outside the EU28 concerns school-books, other educational books, agenda's, atlases, dictionaries etcetera. In other words; books and other printed matter of which the production can be planned ahead on a longer term. The Groep Educatieve Uitgeverijen (GEU) is the sector organisation of educational publishers and is part of the NUV. This group has 37 members, of which approximately 20 publish printed books. The other members only produce digital material. Next to the members of the GEU there is a small number of other educational publishers based in the Netherlands.

The main publishers of school-books, other educational books, agenda's, atlases, dictionaries etcetera are:

- Malmberg
- Noordhoff Uitgevers
- Sdu Uitgevers
- Koninklijk Boom uitgevers B.V.
- Koninklijke BDU
- Uitgeverij Educatief
- ANWB media
- Uitgeverij Zwijsen

Two of these publishers were able to provide import volumes from outside the EU and the representative from the NUV that was interviewed was able to indicate the size of one of the other companies. The three companies account for approximately 9,000 tons of educational books. This volume accounts for little less than 60% of the total EU28-extra imports by the Netherlands in 2012. Making clear that the total import volume from outside the EU as obtained from the CBS database is not far off the realistic situation.

Raw material use

The interviews confirmed that the majority of the imported books from outside EU28 originate from China. For example one of the publishers of educational books imports 81% of the products from outside the EU28, of which 94% from China. Several other countries (e.g. Indonesia, India and Egypt) and the USA are the other main import countries. The

²² Koninklijke vereniging van het boekenvak, Annual report 2012 en 2013, www.kvb.nl

interviewed publishers could only say in which country the books are printed and do have no knowledge of the origin of the wood fibres used to produce the paper and board.

Sustainability and legality

A significant share of the books on the Dutch market nowadays is printed on paper with a certificate for sustainable forest management (e.g. FSC Mix). For the books printed in Europe this can be confirmed by the figures from the CEPI²³ sustainability report 2013. For example 64.9% of the wood, chips and sawmilling by-products used by the paper industry in the EU originates from (FSC or PEFC) certified forests. Whether the wood, chips and sawmilling by-products are actually certified is not stated in the sustainability report. 74.4% of the market pulp delivered to paper and board mills in Europe is certified by independent forest certification schemes and can be counted in their own chain of custody.

According to the sustainability report 2014 of the American Forest & Paper Association (AF&PA) 29% of the wood fibres sourced by their member countries originated from third party certified forests²⁴. This does however relates to the entire wood industry and not just the pulp- and paper industry in the USA.

Such figures as above are unfortunately not available for China. Making it difficult to get an indication of the fibre sourcing of the Chinese pulp- and paper industry.

There are no exact figures available on the share of books produced both inside and outside the EU from paper and board with a certificate for sustainable forest management. All the contacted publishing companies state that it is in their environmental policy that all of the product should be printed on certified paper and that they only work with certified companies to produce their product. Usually they therefore work with the same companies. Following up and checking the validity of certificates and invoices is however done irregularly and ad-hoc. Confirming whether their books were printed on certified paper and board or not proved difficult.

²³ Confederation of the European Paper Industries, http://www.cepi-sustainability.eu/uploads/Full_sustainability2013.pdf

²⁴ The American Forest & Paper Association (AF&PA) is the national trade association of the forest products industry and advances public policies that promote a strong and sustainable U.S. forest products industry in the global marketplace. AF&PA's member companies make more than 75 percent of U.S. pulp, paper, paper-based packaging and wood building materials. http://www.afandpa.org/docs/default-source/default-document-library/sustainability2014_pages_final.pdf?sfvrsn=0

4.3.3 Packaging of paper and paperboard

The product group ‘packaging of paper and paperboard’ consists of 8 different types of products. For the Netherlands the total EU28-extra import value of these products amounted to more than 69 million Euro and over 20,000 tons in 2012. In 2012 the EU28-extra imports accounted for approximately 9% of the total import (€ 790,422,000) (both EU28-extra and -intra) by the Netherlands within this product group .

Figure 4.10 shows that ‘other sacks and bags, including cones’, is the largest product (28%) within the total import. ‘Folding cartons, boxes and cases of non-corrugated paper or paper board’ is the second largest with a share of 26.7%. ‘Cartons, boxes and cases of corrugated paper or paperboard’ complete the top 3 with a share of 17.5%. Looking at the distribution of the EU28-extra import quantity gives the same results, although the percentage shares are slightly different. For the period 2008-2012 the total import values and quantities are presented in table 4.14 and 4.15 respectively. More than half of all EU28-extra imported packaging of paper and paperboard by the Netherlands in 2012 originated from China. The rest of the analysis focusses on the top 3 products.

Figure 4.10

Shares of the different types of products within the total EU28-extra imports of packaging of paper and paperboard by the Netherlands in 2012 based on value (source: CBS database)

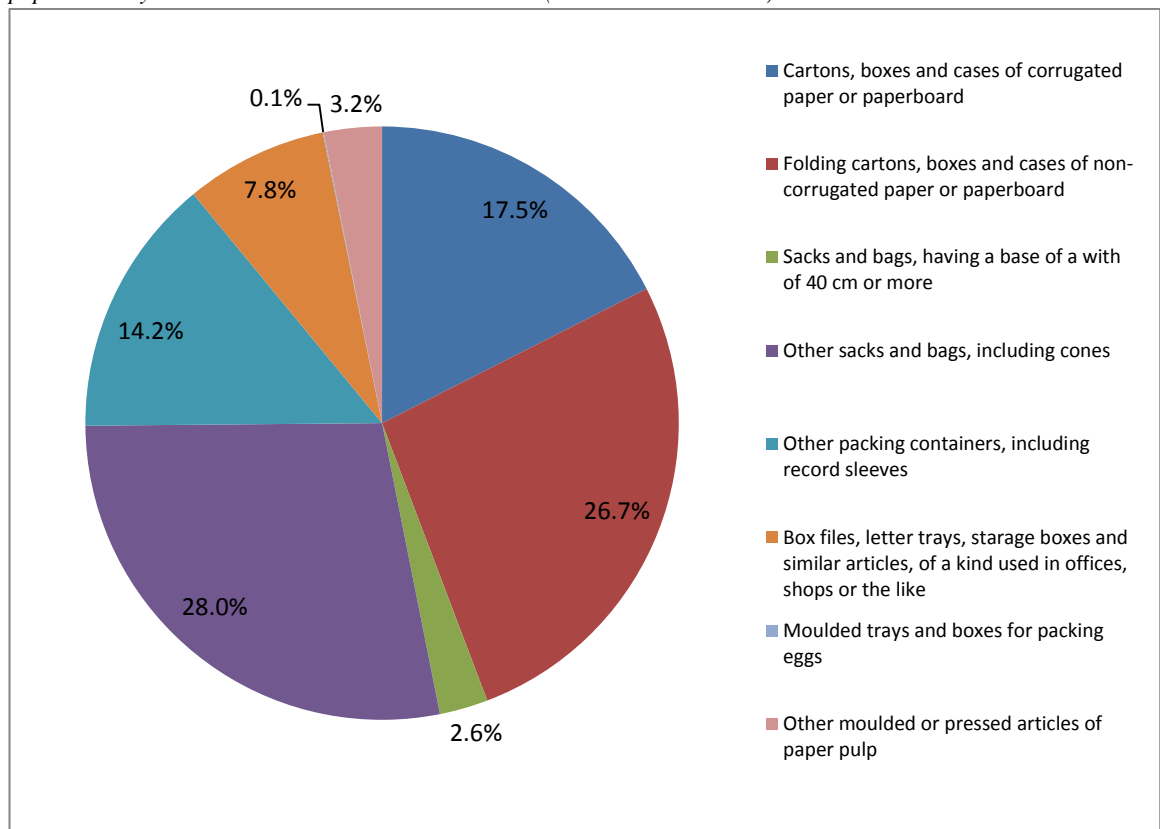


Table 4.14

EU28-extra import values of packaging of paper and paperboard by the Netherlands in the period 2008-2012
(source: CBS database)

Based on value (in 1,000 Euro)						
CN code	Description	2008	2009	2010	2011	2012
48191000	Cartons, boxes and cases of corrugated paper or paperboard	€ 7,914	€ 8,272	€ 11,376	€ 12,294	€ 12,140
48192000	Folding cartons, boxes and cases of non-corrugated paper or paperboard	€ 17,643	€ 14,820	€ 18,501	€ 20,483	€ 18,510
48193000	Sacks and bags, having a base of a width of 40 cm or more	€ 1,184	€ 1,239	€ 1,879	€ 2,049	€ 1,832
48194000	Other sacks and bags, including cones	€ 13,366	€ 13,076	€ 15,833	€ 17,675	€ 19,397
48195000	Other packing containers, including record sleeves	€ 7,735	€ 6,782	€ 6,257	€ 5,621	€ 9,820
48196000	Box files, letter trays, storage boxes and similar articles, of a kind used in offices, shops or the like	€ 5,456	€ 6,123	€ 6,516	€ 6,761	€ 5,380
48237010	Moulded trays and boxes for packing eggs	€ 32	€ 235	€ 392	€ 387	€ 35
48237090	Other moulded or pressed articles of paper pulp	€ 6,790	€ 4,097	€ 2,058	€ 2,441	€ 2,186
Total		€ 60,120	€ 54,644	€ 62,812	€ 67,711	€ 69,300
48191000		13.2%	15.1%	18.1%	18.2%	17.5%
48192000		29.3%	27.1%	29.5%	30.3%	26.7%
48193000		2.0%	2.3%	3.0%	3.0%	2.6%
48194000		22.2%	23.9%	25.2%	26.1%	28.0%
48195000		12.9%	12.4%	10.0%	8.3%	14.2%
48196000		9.1%	11.2%	10.4%	10.0%	7.8%
48237010		0.1%	0.4%	0.6%	0.6%	0.1%
48237090		11.3%	7.5%	3.3%	3.6%	3.2%
Total		100%	100%	100%	100%	100%

Table 4.15

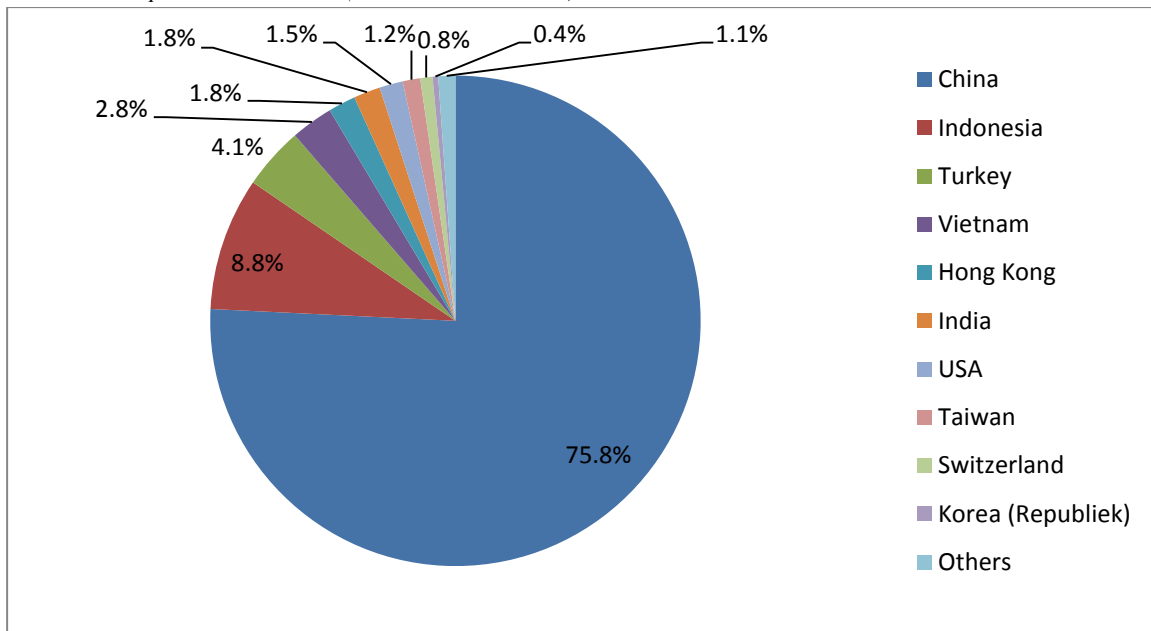
EU28-extra import quantity of packaging of paper and paperboard by the Netherlands in the period 2008-2012
(source: CBS database)

Based on quantity (in tons)						
CN code	Description	2008	2009	2010	2011	2012
48191000	Cartons, boxes and cases of corrugated paper or paperboard	3,623	3,255	4,357	4,203	3,307
48192000	Folding cartons, boxes and cases of non-corrugated paper or paperboard	6,649	5,600	5,361	5,160	4,527
48193000	Sacks and bags, having a base of a width of 40 cm or more	640	422	790	1,034	597
48194000	Other sacks and bags, including cones	5,605	5,088	5,553	6,291	6,015
48195000	Other packing containers, including record sleeves	2,482	2,414	1,838	2,288	3,384
48196000	Box files, letter trays, storage boxes and similar articles, of a kind used in offices, shops or the like	1,935	1,897	2,014	2,148	1,409
48237010	Moulded trays and boxes for packing eggs	28	153	222	185	18
48237090	Other moulded or pressed articles of paper pulp	1,346	1,121	673	1,638	1,018
Total		22,310	19,950	20,807	22,946	20,274
48191000		16.2%	16.3%	20.9%	18.3%	16.3%
48192000		29.8%	28.1%	25.8%	22.5%	22.3%
48193000		2.9%	2.1%	3.8%	4.5%	2.9%
48194000		25.1%	25.5%	26.7%	27.4%	29.7%
48195000		11.1%	12.1%	8.8%	10.0%	16.7%
48196000		8.7%	9.5%	9.7%	9.4%	7.0%
48237010		0.1%	0.8%	1.1%	0.8%	0.1%
48237090		6.0%	5.6%	3.2%	7.1%	5.0%
Total		100%	100%	100%	100%	100%

With a share of almost 76% China is the main country of origin of ‘other sacks and bags, including cones’ imported by the Netherlands in 2012. Indonesia and Turkey complete the top 3 (figure 4.11).

Figure 4.11

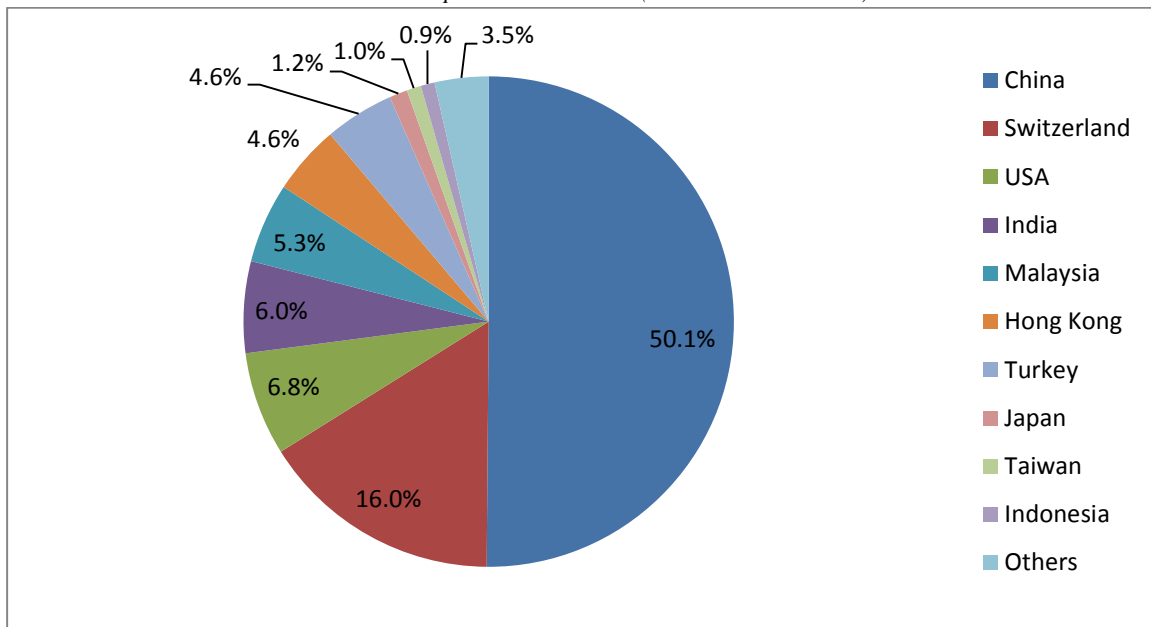
Countries of origin of other sacks and bags, including cones imported by the Netherlands in 2012 based on EU28-extra import based on value (source: CBS database)



Slightly more than 50% of the folding cartons, boxes and cases of non-corrugated paper or paperboard EU28-extra imported by the Netherlands in 2012 originated from China. Followed at a distance by Switzerland and the USA (figure 4.12).

Figure 4.12

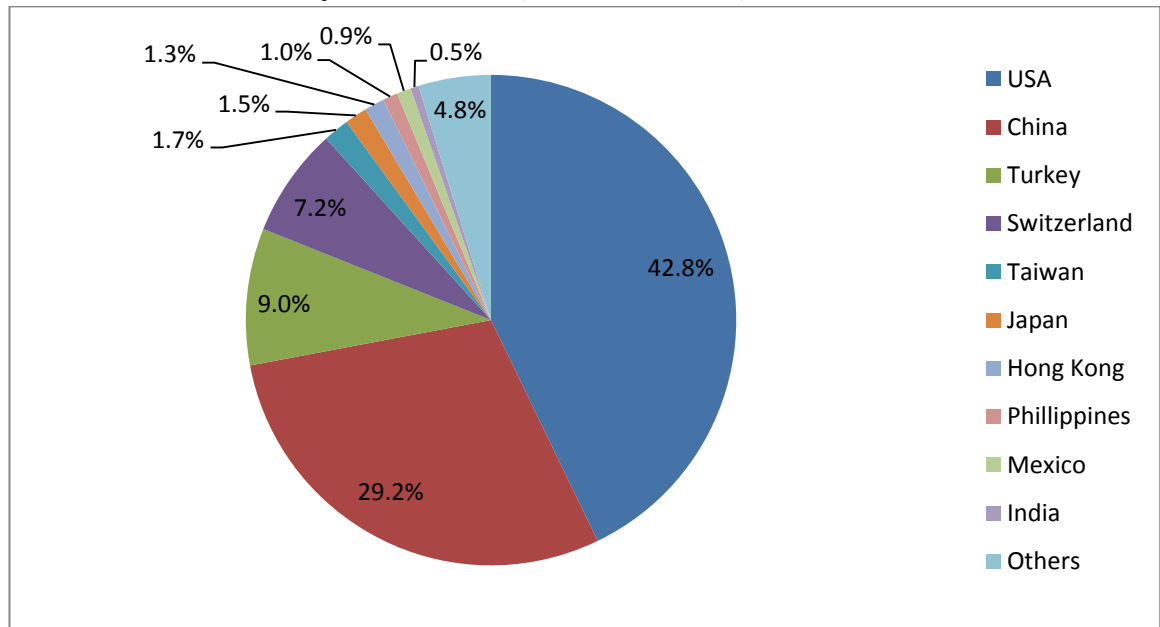
Countries of origin of folding cartons, boxes and cases of non-corrugated paper or paperboard imported by the Netherlands in 2012 based on EU28-extra import based on value (source: CBS database)



‘Cartons, boxes and cases of corrugated paper or paperboard’ EU28-extra imported by the Netherlands in 2012 mainly originated from the USA (42.8%) and China (29.2%). Turkey (9%) completes the top 3 (figure 4.13).

Figure 4.13

Countries of origin of cartons, boxes and cases of corrugated paper or paperboard imported by the Netherlands in 2012 based on EU28-extra import based on value (source: CBS database)



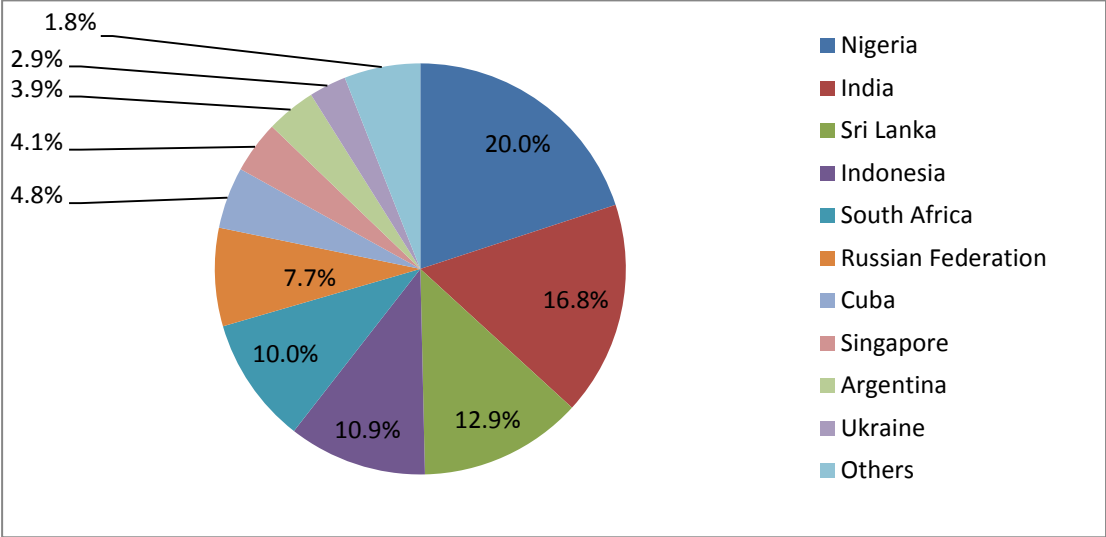
Based on the results of the analyses above and the necessity to reduce the workload within the study it was decided to exclude the product group packaging of paper and paperboard from further analysis.

4.3.4 Wood based charcoal

There are two codes for charcoal in the Combined Nomenclature. The code that is used in this study refers to charcoal (loose and briquettes) based on wood (44029000²⁵). As charcoal based on shells and nuts should also be reported under this code, shell and nut charcoal might also be included. The other code (44021000) refers to charcoal based on bamboo. The total EU28-extra import value by the Netherlands of wood based charcoal was 10.4 million Euro on average for the period 2008-2011. Accounting for 74% of the total (both EU28-intra and -extra) average imports (14.1 million Euro) of charcoal by the Netherlands in that same period. The average import in the period 2008-2011 corresponds to a quantity of approximately 30,000 tons. The import value (16 million Euro) and quantity (app. 51,000 tons) peaked in 2012 due to an increase (from 0 to 10,000 tons) of the imports from the Russian Federation. This peak could not be confirmed by the contacted companies and in order to avoid overestimation the 2012 figures are not used to calculate the average. In addition to the average EU28-extra imports of charcoal by the Netherlands the average apparent consumption²⁶ has also been calculated. This apparent consumption accounts for approximately 20,000 tons of charcoal each year.

Nigeria is the main country of origin of the EU28-extra import of wood based charcoal by the Netherlands independent whether the analysis is based on the value or the quantity. In 2012 Nigeria had a share of 20% based on value and 28.7% based on quantity (figure 3.27). Based on the value India (16.8%) and Sri Lanka (12.9%) come in second and third place. Based on quantity the Russian Federation (19.9%) is the second largest country of origin and India is third (figure 3.28).

Figure 4.14
Countries of origin for wood based charcoal imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

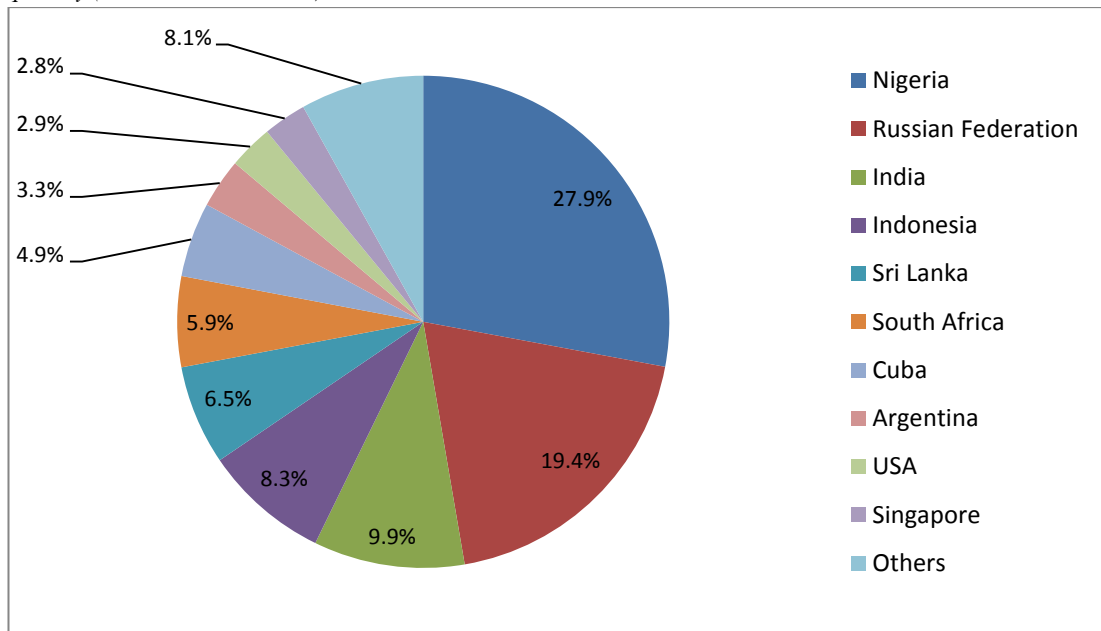


²⁵ Wood charcoal, incl. shell or nut charcoal, whether or not agglomerated (excl. bamboo charcoal, wood charcoal used as a medicament, charcoal mixed with incense, activated charcoal and charcoal in the form of crayons)

²⁶ Production + Imports (EU28-intra and -extra) – Exports (EU28-intra and -extra)

Figure 4.15

Countries of origin for wood based charcoal imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)



Market structure and important market players

There is no sector association for charcoal importers in the Netherlands. Six main importers of charcoal on the Dutch market have been identified:

- Dammers Houtkool
- Masterfire
- Fire-UP
- Golden flame
- Terlanco
- Tasmania Handel-Maatschappij

These companies import the majority of the charcoal and briquettes in the Netherlands. Probably there are some more importers, but their contribution to the total import in the Netherlands is presumably very small.

Only two of the six companies gave their annual import figures. They are not presented here as they might be traced back to individual companies. These two companies aren't however the major players on the Dutch charcoal market. Several of the companies however gave their estimate of the total import in the Netherlands. Their estimate lies between 14,000 and 20,000 tons of charcoal per year. They all emphasized the difficulty of their estimate due to the range of units (liter, kilo) being used and the rather big fluctuation of the volume due to weather conditions, especially during (public) holidays, weekends and special events. Nonetheless their estimations correspond to the calculated apparent consumption of 20,000 based on the CBS database. The interviewed companies have been asked whether they know if there is a large industrial user of wood based charcoal, but they don't have any knowledge about this. In the steel producing industry charcoal has long been replaced by cokes. Apparently the charcoal consumed in the Netherlands is mainly used by private households and to a lesser extent by small companies such as blacksmiths, barbeque restaurants etc.

Raw material use

In general woody tree species for charcoal production should have a long burning time, a very high heat value and produce little smoke, sparks or ash²⁷. Approximately 5 to 6 times the amount of wood is needed in order to produce 1 ton of charcoal. Briquettes are made of pulverized smaller particles of charcoal (< 10-20 mm), which are pressed into small blocks. Charcoal for domestic use consists of particles between approximately 20 and 80 mm. Charcoal for professional use consists of particles between 20-60 and 120 mm. The interviewed companies would or could not provide information on which tree species are used for the production of charcoal and which countries this wood originates from.

Sustainability and legality

Just two companies have (FSC) certified charcoal in their product range. The interviews have not provided any quantitative information. Most companies claim there is a rather large interest in certified charcoal with their customers, but that the willingness to pay more for certified product is small. Furthermore, the interviewed persons claim that the availability of certified charcoal is very limited. This is especially the case for briquettes, since these are made from many smaller deliveries and therefore more difficult to control. The limited availability of FSC certified charcoal is confirmed in the 'Between two Worlds Blog' of Anne Sophie from TFT²⁸ in December 2013.

²⁷ Gumbo, D. J., Moombe, K. B., Kandulu, M. M., Kabwe, G., Ojanen, M., Ndhlovu, E. and Sunderland, T.C.H. 2013. Dynamics of the charcoal and indigenous timber trade in Zambia: A scoping study in Eastern, Northern and Northwestern provinces. Occasional Paper 86. CIFOR, Bogor, Indonesia.

²⁸ <http://between2worlds.com/defining-responsible-charcoal/> (3 december 2013)

4.3.5 Guitars (acoustic and amplified)

The Netherlands imports large numbers of acoustic- and amplified guitars. In 2012 the total EU28-extra imports accounted for almost 65 million Euro. Amplified guitars had a share of 60% within this total value. The total EU28-extra imports quantity of guitars amounted to more than 290,000 guitars. Acoustic guitars have a share of 57% within the total quantity. The total of 290,000 guitars seems to be very high number for the consumption in the Netherlands. For this reason the exported number of guitars by the Netherlands in 2012 has also been analysed. In 2012 the Netherlands exported almost 174,000 guitars. Which is 60% of the imported number. In 2010 and 2011 the share of exports was even higher.

In 2012 the EU28-extra imports accounted for approximately 82% of the total import (356,389 pieces) (both EU28-extra and EU28-intra) by the Netherlands within this product group²⁹.

Table 4.16

EU28-extra import values and quantities of guitars by the Netherlands in the period 2008-2012 (source CBS database)

Based on value (in 1,000 Euro)						
CN code	Description	2008	2009	2010	2011	2012
92029030	Acoustic guitars	€ 14,900	€ 9,254	€ 15,733	€ 22,786	€ 25,785
92079010	Amplified guitars	€ 18,166	€ 37,735	€ 33,433	€ 37,765	€ 38,815
Total		€ 33,066	€ 46,989	€ 49,166	€ 60,551	€ 64,600
92029030	Acoustic guitars	45%	20%	32%	38%	40%
92079010	Amplified guitars	55%	80%	68%	62%	60%
Total		100%	100%	100%	100%	100%
Based on quantity (in pieces)						
CN code	Description	2008	2009	2010	2011	2012
92029030	Acoustic guitars	140,030	148,929	145,351	157,930	165,376
92079010	Amplified guitars	100,496	159,504	165,508	155,076	126,345
Total		240,526	308,433	310,859	313,006	291,721
92029030	Acoustic guitars	58%	48%	47%	50%	57%
92079010	Amplified guitars	42%	52%	53%	50%	43%
Total		100%	100%	100%	100%	100%

Based on value the USA is the main country of origin for acoustic- as well as amplified guitars in 2012 (figures 4.16 and 4.18). Followed at a distance by China. The situation for acoustic guitars based on quantity is the other way around. Based on the quantity China is by far the main country of origin for acoustic guitars imported by the Netherlands in 2012 (figure 4.17). For amplified guitars the USA remains the main country of origin based on quantity, but its share (38.3%) is almost equalled by China (36.8%) in 2012 (figure 4.19). The contacted importers of guitars in the Netherlands indicate that the high end models from there product ranges are mainly manufactured in and imported from the USA. Whereas the

²⁹ Source: CBS database

low end models are mainly manufactured and imported from China and to a lesser extent Indonesia.

Figure 4.16

Countries of origin for acoustic guitars imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

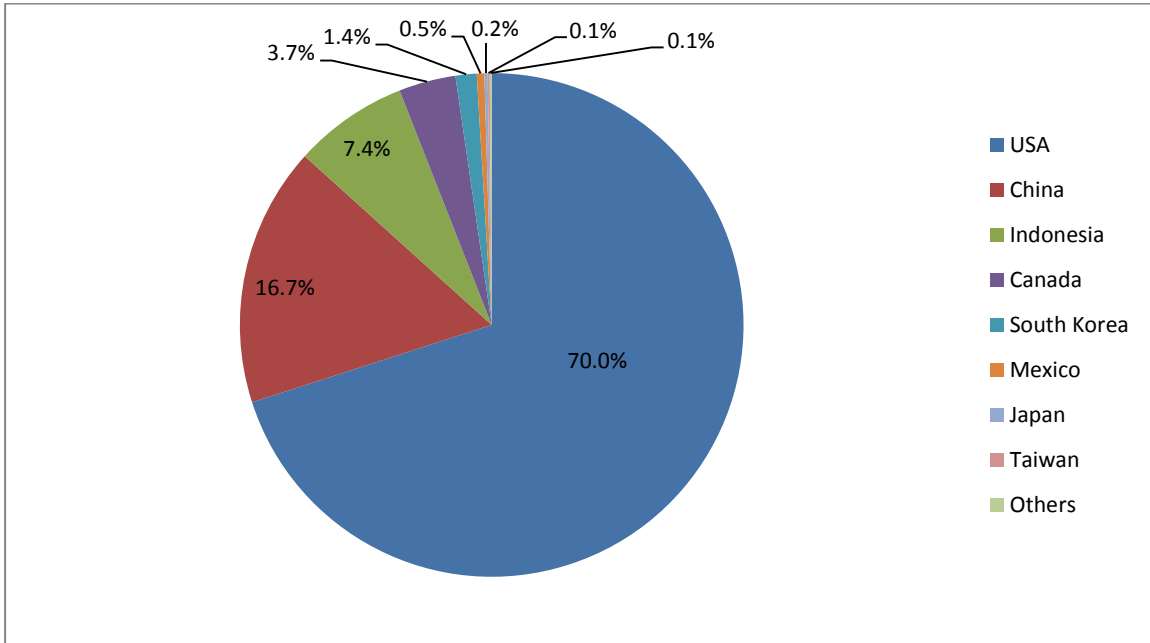


Figure 4.17

Countries of origin for acoustic guitars imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)

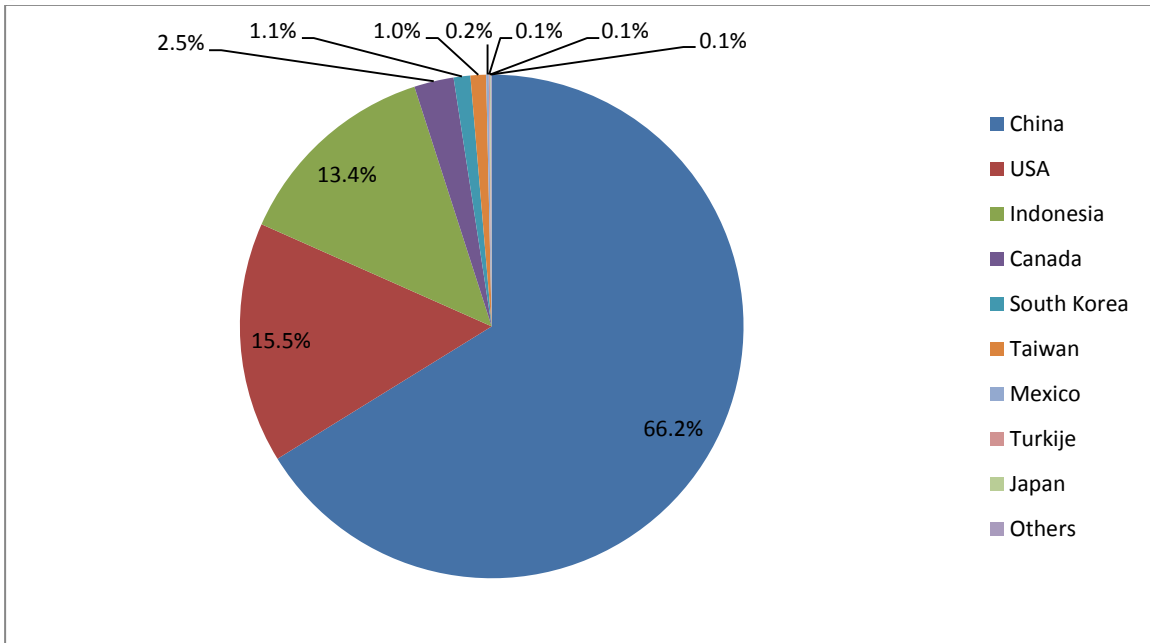


Figure 4.18

Countries of origin for amplified guitars imported by the Netherlands in 2012 based on EU28-extra import value (source: CBS database)

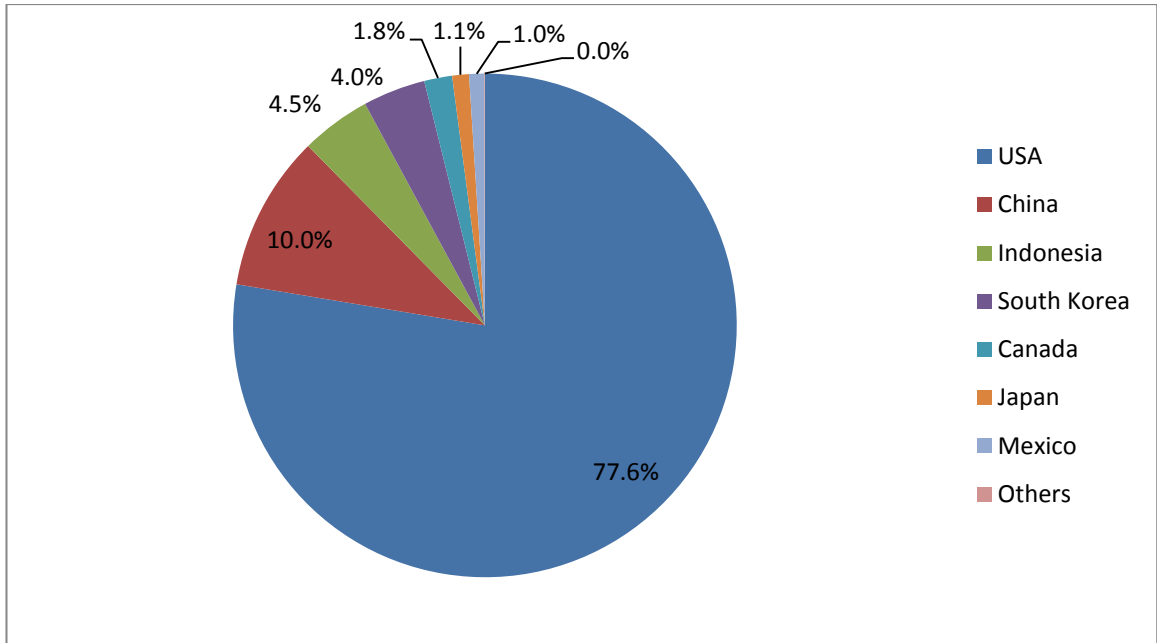
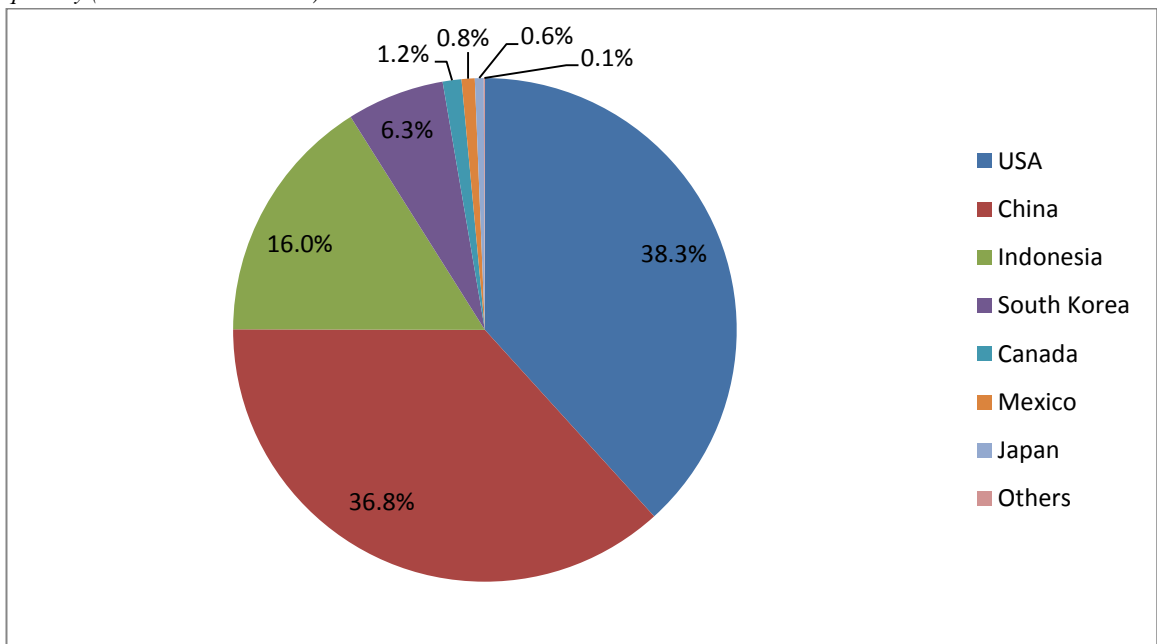


Figure 4.19

Countries of origin for amplified guitars imported by the Netherlands in 2012 based on EU28-extra import quantity (source: CBS database)



Market structure and important market actors

There are a couple of major guitar importers:

- Benelly Import: located in Den Haag (Netherlands), distributor of several guitar brands in Belgium, Luxemburg and the Netherlands
- EMD Music: located in Brussels (Belgium), distributor of several guitar brands (STAGG) in Austria, Belgium, France, Germany, Luxemburg, the Netherlands and United Kingdom
- EMP Music: located in Raamsdonksveer (Netherlands), distributor of several guitar brands in Belgium, Luxemburg and the Netherlands.
- Fender Musical Instruments GMBH: located in Düsseldorf (Germany), distributor of Fender guitars in Austria, Belgium, Germany, Luxemburg, the Netherlands and Switzerland.
- Gibson Europe: located in Vianen (Netherlands), distributor of Gibson guitars in Austria, Belgium, France, Germany, Greece, Italy, Luxemburg, the Netherlands Spain, Turkey and United Kingdom
- PB Music: located in Roermond (Netherlands), distributor of several guitar brands in Belgium, Luxemburg and the Netherlands.

From some major guitar distributors/sellers in the Netherlands like Bax Shop and Bas van den Broek it did not become clear whether they also directly import guitars. Next to the major importers above, a maximum of 25 Dutch companies do import small numbers of guitars in the Netherlands. It is unknown which market share these small importers represent. None of the interviewed companies gave figures on import and export. The major part of the guitars imported in the Netherlands are being distributed on the European market (re-export).

Although companies did not provide any figures, it became clear that the majority of the guitars are indeed imported from the U.S.A. and China. Smaller amounts are imported from Indonesia, Canada and South Korea. Several companies also mentioned Spain as a manufacturing country.

There is no sector associations for guitar importers in the Netherlands. It is unclear whether the 'Vereniging voor Muziekhandelaren en -uitgevers in Nederland' does also represent guitar importers/distributors. Some companies mentioned the National Association of Music Merchant (NAMM, www.namm.org) as a possible information source for guitar imports from the United States. Through their website they provide information especially concerning legality to their members. The NAMM has however not been contacted during this study.

Raw material use

The interviewed companies mention several tropical timber species that are used for manufacturing guitars: mahogany, ebony and palissander. In addition, tropical plywood is used. Not all importers know the timber species used in the guitars. They did indicate however that business to business invoices often contain names of timber species.

Sustainability and legality

According to the interviewees none of the interviewed companies had FSC and PEFC certified guitars in its product range. Only Gibson indicated that part of the wood used for the guitar production had a FSC certificate. Also timber from 'other sustainable sources' is used for Gibson guitars. The Gibson Europe customer service indicated that, as far as they knew, the guitars that were put on the market did not have a FSC-certificate or other certificate or claim for sustainably sourced or legal timber. They also indicated that there is a slight increase in customers asking for guitars made from sustainably sourced materials. This not only includes timber, but also nacre used for inlay and bone material for bridges. However, there is no specific demand for FSC or PEFC certified guitars.

Only few of the interviewed companies were aware of the existence of certificates for sustainable forest management, like FSC or PEFC. Also legality does not seem to be a major issue in the guitar trading business. Most companies don't seem to be aware of systems for ensuring timber legality. Only one company mentioned the US Lacey Act as a guarantee that the imported guitars from the US were from a legal source.

5. RECOMMENDATIONS

Based on the results and the experiences gained during the study a number of recommendations have been formulated that can be used for follow-up to this study or to improve future studies like these.

1. For a large number of secondary wood products the type of products and the (wood) composition of those products which fall under the various CN codes is unclear. It is recommended to study the (wood) composition of various secondary wood products in more detail. Besides for obvious categories such as 'statuettes and other ornaments of wood', 'tableware and kitchenware' and 'caskets and cases', it also goes for 'Other seats, with wooden frames (upholstered and not)'.
2. The results of the product groups guitars and charcoal show that sustainability certifications plays a very minor role, while in fact there is, especially for charcoal, a fairly direct link to the forest. Although there are indications that the situation concerning the role of sustainability certification might be changing. It might be interesting for WWF Netherlands to see whether it would be possible to increase sustainable sourcing of raw materials for these products by contacting the major players in the market and to try to formulate a common goal. This might be done in a number of countries at the same time. International cooperation is especially obvious for guitars.
3. During the analysis for books it became clear that the EU28-extra imports to a large extend consist of educational books. This is of course an interesting product group to use to gain attention for the issue of sustainable sourcing, also in relation to the timber procurement policy of the Dutch government. At this point the exact share of certified sustainably sourced material within these books is however not known.
4. For composite products such as upholstered seats and guitars it might be good to include all (nature based) raw material while looking at the issue of sustainability.
5. The product group seats requires a specific study into the furniture market in the Netherlands in general, including the imports, exports and production of furniture. The study revealed that the furniture market is too big to cover in a few days. Next to this it seems to be good to form a group of large companies and to discuss with them what assistance they would need to increase the market share of certified sustainably sourced wooden furniture on the Dutch market.
6. In future studies it is recommended to focus on a specific product group and not to divide the (limited) time available over too many product groups. In addition, it is recommended to invest time for face to face meetings with sector associations and individual companies. Especially when targeting product groups for which the issue of sustainability is relatively new.

7. The focus of this study was on the EU28-extra imports by the EU in general and the Netherlands in particular. The actual consumption (accounting for production and (re-)exports) of the different timber products was not considered. Resulting in difficulties for quantifying and understanding the Dutch market.

ANNEX 1 COMBINED NOMENCLATURE CODES

Overview of the chapters from the Combined Nomenclature (CN) completely or partly dealing with primary and or secondary timber products. Under each chapter heading the CN codes corresponding to timber products, considered as secondary timber products within this study, are mentioned.

CHAPTER 44

Wood and articles of wood; wood charcoal

Secondary:

- 4414 Wooden frames for paintings, photographs, mirrors or similar objects;
- 4415 Packing cases, boxes, crates, drums and similar packings, of wood; cable–drums of wood; pallets, box pallets and other load boards, of wood; pallet collars of wood;
- 4416 Casks, barrels, vats, tubs and other coopers' products and parts thereof, of wood, including staves;
- 4417 Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood; boot or shoe lasts and trees, of wood;
- 4418 Builders' joinery and carpentry of wood, including cellular wood panels, assembled flooring panels, shingles and shakes;
- 4419 Tableware and kitchenware, of wood;
- 4420 Wood marquetry and inlaid wood; caskets and cases for jewellery or cutlery, and similar articles, of wood; statuettes and other ornaments, of wood; wooden articles of furniture not falling in Chapter 94 and;
- 4421 Other articles of wood

Primary: all other codes

CHAPTER 47

Pulp of wood or of other fibrous cellulosic material; recovered (waste and scrap) paper or paperboard

Secondary: none

Primary: all codes

CHAPTER 48

Paper and paperboard; articles of paper pulp, of paper or of paperboard

Secondary:

- 4813 Cigarette paper;
- 4814 Wallpaper;
- 4816 Self-copy paper and copying or transfer papers;
- 4817 Envelopes, Letter cards etc.;
- 4818 Hygiene paper;
- 4819 Packaging of paper and board;
- 4820 Office articles;
- 4821 Self-adhesive labels;
- 4822 Bobbins, spools, cops and similar supports;

4823 Other paper, paperboard, cellulose wadding and webs of cellulose fibres, cut to size or shape; other articles of paper pulp, paper, paperboard, cellulose wadding or webs of cellulose fibres

Primary: all other codes

CHAPTER 49

Printed books, newspapers, pictures and other products of the printing industry; manuscripts, typescripts and plans

Secondary: all codes

Primary: none

CHAPTER 92

Musical instruments; parts and accessories of such articles

Secondary: musical instruments (partly) consisting of wood

9201 Pianos

92021010 Violins

92021090 Other string musical instruments played with a bow

92029030 Acoustic guitars

92029080 Mandolins, zithers etc.

92059090 Wind musical instruments

92060000 Percussion musical instruments

92079010 Guitars amplified

92099100 Parts of pianos

92099200 Parts of string musical instruments

Primary: none

CHAPTER 94

Furniture; bedding, mattresses, mattress supports, cushions and similar stuffed furnishings; lamps and lighting fittings, not elsewhere specified or included; illuminated signs, illuminated nameplates and the like; prefabricated buildings

Secondary:

94016100 Other seats, with wooden frames; upholstered;

94016900 Other seats, with wooden frames; other;

94019030 Furniture parts of wood

940330 Wooden furniture of a kind used in offices;

940340 Wooden furniture of a kind used in the kitchen;

940350 Wooden furniture of a kind used in the bedroom;

940360 Other wooden furniture;

94039030 Furniture parts of wood;

94060020 Prefabricated buildings of wood

Primary: none

CHAPTER 95

Toys, games and sports requisites; parts and accessories thereof

Secondary: 95030061 wooden puzzles

Primary: none

CHAPTER 96

Miscellaneous manufactured articles

Secondary: 960910 pencils

Primary: none

ANNEX 2 RANKING OF EU28 COUNTRIES BASED ON IMPORT VALUE

Ranking of EU28 countries based on the import value (in Euro) of secondary timber product imported by the country in total (table a), under the EUTR (table b) and exempted from the EUTR (table c). The ranking is based on the year 2013, but the import values are also presented for the years 2008-2012.

Table a.

Ranking of EU28 countries based on the total import value (in Euro) of secondary timber products for the year 2013 (Source: COMEXT database)

Country/Year	2008	2009	2010	2011	2012	2013
United Kingdom	4,316,960,981	3,706,598,541	4,280,735,014	4,130,353,605	4,690,209,093	4,593,883,037
Germany	2,524,878,917	2,434,989,241	2,817,677,792	2,821,910,415	2,786,749,680	2,584,318,319
France	1,649,339,241	1,454,456,794	1,781,288,984	1,735,562,997	1,832,885,641	1,567,615,249
Netherlands	1,229,150,121	1,249,056,081	1,449,420,290	1,401,795,192	1,452,038,457	1,222,435,064
Italy	962,002,401	805,403,246	908,937,207	902,084,804	816,937,061	830,952,867
Belgium	844,494,560	764,908,631	785,195,743	790,673,099	810,091,775	742,444,998
Sweden	556,578,205	479,541,994	570,765,593	570,590,641	558,553,965	522,609,939
Spain	860,397,458	633,298,796	708,792,897	644,039,121	554,383,622	465,419,939
Denmark	547,720,581	426,253,374	492,264,457	425,164,020	414,007,240	400,146,275
Austria	269,060,511	277,400,294	281,224,190	318,421,638	322,086,496	297,542,611
Poland	288,441,024	230,753,044	252,669,463	261,584,615	272,680,947	251,711,610
Ireland	279,926,108	187,619,743	185,551,212	162,342,872	166,368,510	166,357,908
Slovenia	101,489,506	95,736,911	111,960,771	126,513,328	128,797,505	132,236,981
Czech Republic	142,822,200	120,812,709	137,651,517	148,839,345	127,703,883	127,218,890
Greece	315,757,743	264,285,534	247,299,149	198,863,282	147,301,440	126,875,434
Romania	203,837,157	134,663,161	128,680,470	113,871,239	105,679,282	111,895,362
Finland	127,092,264	104,897,139	117,759,045	108,527,600	105,037,896	98,051,787
Croatia	115,830,267	95,280,756	96,684,049	98,270,414	97,632,198	87,050,821
Hungary	91,919,880	80,549,130	70,302,971	76,490,735	78,745,916	71,262,776

Bulgaria	93,669,880	63,903,387	64,417,546	57,784,397	53,932,033	56,728,283
Lithuania	63,180,815	40,673,761	40,974,467	49,137,449	51,964,471	53,277,393
Portugal	74,266,796	58,078,549	70,358,279	61,472,820	47,472,395	44,424,112
Latvia	51,065,655	25,219,261	31,335,516	33,195,446	36,222,821	34,508,099
Slovakia	42,301,897	30,034,124	38,127,804	33,551,133	33,958,242	32,915,520
Cyprus	58,762,877	46,422,100	49,893,580	42,076,584	35,795,236	29,103,523
Estonia	33,554,646	21,530,550	22,863,783	22,269,879	26,572,692	24,241,650
Malta	13,754,823	13,168,959	14,024,133	13,898,533	12,872,961	11,411,803
Luxemburg	8,597,037	5,308,289	5,992,959	6,134,456	10,547,357	9,617,989
Total secondary	15,872,337,439	13,857,842,191	15,766,118,897	15,357,968,165	15,778,918,113	14,697,422,636

Table b

Ranking of EU28 countries based on the total import value (in Euro) of secondary timber products included under the EUTR for the year 2013 (Source: COMEXT database)

Country/Year	2008	2009	2010	2011	2012	2013
United Kingdom	2,081,974,027	1,782,753,613	2,111,692,658	2,010,076,286	2,323,259,467	2,412,174,674
Germany	1,191,754,336	1,146,321,958	1,337,844,796	1,380,484,214	1,333,011,527	1,249,053,762
France	921,593,285	801,114,624	984,200,204	931,635,813	981,986,553	821,395,358
Netherlands	633,698,982	645,413,131	769,153,908	716,878,224	723,251,105	587,197,147
Italy	543,546,216	418,786,052	497,960,098	502,792,391	444,899,491	495,253,936
Belgium	437,056,898	424,733,519	476,935,024	500,660,991	536,532,149	488,036,626
Sweden	319,470,743	278,972,809	343,713,209	349,972,263	334,413,571	315,697,187
Denmark	275,343,030	204,388,882	281,650,412	241,733,387	237,163,169	242,436,766
Austria	157,917,231	167,549,445	176,887,967	212,943,526	215,449,678	198,628,861
Spain	455,360,316	306,722,302	345,399,500	288,185,752	231,054,370	192,060,125
Poland	168,004,821	129,487,152	146,057,034	155,735,515	160,556,220	139,749,570
Ireland	201,690,286	126,881,021	132,601,520	111,632,858	114,518,994	114,241,734
Romania	152,008,002	101,236,138	102,368,659	87,944,653	75,162,893	81,081,689
Slovenia	47,988,597	49,949,207	58,392,901	63,457,535	61,413,236	71,214,533
Czech Republic	72,114,207	63,426,619	71,208,917	82,864,884	71,237,869	69,880,363
Greece	196,899,940	157,723,938	148,897,086	115,288,705	81,525,524	67,885,819
Croatia	70,284,876	59,526,145	59,863,774	61,536,203	61,272,431	54,719,250
Finland	57,285,080	46,862,095	55,619,545	53,765,401	52,178,651	52,974,852
Bulgaria	72,469,555	49,209,217	47,234,667	46,852,790	43,042,554	44,093,047
Hungary	49,962,940	41,206,014	39,093,113	40,419,289	44,467,268	40,870,187
Lithuania	41,586,915	27,258,850	25,318,564	30,077,178	30,419,441	32,944,723
Latvia	31,997,428	15,563,692	22,182,897	23,679,707	25,764,829	24,123,925

Portugal	31,434,353	22,846,898	29,039,935	24,970,549	19,388,745	19,519,780
Cyprus	44,093,786	34,219,385	36,977,158	29,343,956	22,830,737	16,983,966
Slovakia	27,749,471	17,560,559	17,950,748	15,457,159	16,777,591	16,928,105
Estonia	18,212,823	11,038,106	12,649,530	11,548,148	14,624,797	13,001,924
Malta	8,589,013	7,585,811	7,504,653	8,106,612	7,570,879	6,841,573
Luxemburg	4,803,481	1,814,253	1,669,912	1,873,108	1,381,750	1,768,718
Total secondary	8,314,890,638	7,140,151,435	8,340,068,389	8,099,917,097	8,265,155,489	7,870,758,200

Table c

Ranking of EU28 countries based on the total import value (in Euro) of secondary timber products exempted from the EUTR for the year 2013 (Source: COMEXT database)

Country/Year	2008	2009	2010	2011	2012	2013
United Kingdom	2,234,986,954	1,923,844,928	2,169,042,356	2,120,277,319	2,366,949,626	2,181,708,363
Germany	1,333,124,581	1,288,667,283	1,479,832,996	1,441,426,201	1,453,738,153	1,335,264,557
France	727,745,956	653,342,170	797,088,780	803,927,184	850,899,088	746,219,891
Netherlands	595,451,139	603,642,950	680,266,382	684,916,968	728,787,352	635,237,917
Italy	418,456,185	386,617,194	410,977,109	399,292,413	372,037,570	335,698,931
Spain	405,037,142	326,576,494	363,393,397	355,853,369	323,329,252	273,359,814
Belgium	407,437,662	340,175,112	308,260,719	290,012,108	273,559,626	254,408,372
Sweden	237,107,462	200,569,185	227,052,384	220,618,378	224,140,394	206,912,752
Denmark	272,377,551	221,864,492	210,614,045	183,430,633	176,844,071	157,709,509
Poland	120,436,203	101,265,892	106,612,429	105,849,100	112,124,727	111,962,040
Austria	111,143,280	109,850,849	104,336,223	105,478,112	106,636,818	98,913,750
Slovenia	53,500,909	45,787,704	53,567,870	63,055,793	67,384,269	61,022,448
Greece	118,857,803	106,561,596	98,402,063	83,574,577	65,775,916	58,989,615
Czech Republic	70,707,993	57,386,090	66,442,600	65,974,461	56,466,014	57,338,527
Ireland	78,235,822	60,738,722	52,949,692	50,710,014	51,849,516	52,116,174
Finland	69,807,184	58,035,044	62,139,500	54,762,199	52,859,245	45,076,935
Croatia	45,545,391	35,754,611	36,820,275	36,734,211	36,359,767	32,331,571
Romania	51,829,155	33,427,023	26,311,811	25,926,586	30,516,389	30,813,673
Hungary	41,956,940	39,343,116	31,209,858	36,071,446	34,278,648	30,392,589
Portugal	42,832,443	35,231,651	41,318,344	36,502,271	28,083,650	24,904,332
Lithuania	21,593,900	13,414,911	15,655,903	19,060,271	21,545,030	20,332,670
Slovakia	14,552,426	12,473,565	20,177,056	18,093,974	17,180,651	15,987,415

Bulgaria	21,200,325	14,694,170	17,182,879	10,931,607	10,889,479	12,635,236
Cyprus	14,669,091	12,202,715	12,916,422	12,732,628	12,964,499	12,119,557
Estonia	15,341,823	10,492,444	10,214,253	10,721,731	11,947,895	11,239,726
Latvia	19,068,227	9,655,569	9,152,619	9,515,739	10,457,992	10,384,174
Luxemburg	3,793,556	3,494,036	4,323,047	4,261,348	9,165,607	7,849,271
Malta	5,165,810	5,583,148	6,519,480	5,791,921	5,302,082	4,570,230
Total secondary	7,557,446,801	6,717,688,747	7,426,048,498	7,258,049,057	7,513,760,612	6,826,662,423

ANNEX 3 RANKING OF SECONDARY TIMBER PRODUCTS IMPORTED BY THE EU28

The ranking for all secondary timber products that are imported by the EU28 based on their value. The ranking is based on the year 2013, but import values are also presented for the years 2008-2012. Table a refers to all products, table b is dealing with products under the EUTR and table c contains products exempted from the EUTR.

Table a.

Ranking of secondary timber products imported by the EU28 based on their total import value (in Euro) for the year 2013 (Source: COMEXT database)

Product group	2008	2009	2010	2011	2012	2013
Books	1,905,397,904	1,656,037,453	1,710,349,153	1,784,542,714	1,854,935,356	1,686,907,260
Upholstered seats, with wooden frames	2,071,117,583	1,782,834,942	2,130,911,871	1,808,242,244	1,913,721,848	1,648,137,608
Packaging of paper and board	1,096,193,544	975,216,338	1,164,700,373	1,232,020,531	1,313,193,158	1,285,858,756
Other furniture (excl. others specified)	1,458,896,673	1,123,536,946	1,266,578,415	1,157,604,606	1,167,264,132	1,044,282,430
Furniture for dining rooms and living rooms (excl. seats)	1,319,465,318	1,058,293,605	1,307,917,707	1,101,026,024	1,154,786,183	960,775,236
Wood pellets	-	222,410,548	352,607,313	445,291,625	652,483,337	878,992,943
Other articles of wood	724,523,612	657,132,424	756,298,870	774,094,808	782,281,609	716,991,774
Bedroom furniture (excl. seats)	693,332,233	657,140,648	753,051,554	701,976,266	753,516,446	646,973,170
Office articles	439,666,696	387,920,614	455,832,845	447,088,451	458,739,073	426,114,315
Assembled flooring panels	492,452,048	363,073,309	438,292,246	465,549,095	463,506,889	397,546,649
Other printed matter	253,002,943	241,632,053	282,189,687	297,543,289	335,797,827	295,214,483
Doors and their frames and thresholds	368,808,966	275,540,366	322,430,451	292,514,317	285,242,663	276,313,248
Hygiene paper	454,457,651	484,559,365	532,905,093	517,239,885	288,789,362	269,982,889
Printed or illustrated postcards	205,209,998	204,917,255	221,447,909	246,759,047	242,986,374	230,277,047
Self-adhesive labels	185,237,818	179,623,311	207,676,477	213,627,820	222,132,916	218,772,144
Other joinery products	335,901,831	246,202,757	277,771,292	279,054,888	261,144,860	214,522,149
Wooden packaging	183,932,606	156,674,630	144,171,445	158,676,040	193,127,220	210,696,167

Charcoal	157,265,555	194,227,401	191,713,153	200,211,308	200,717,201	204,334,750
Newspapers, journals and periodicals	198,033,751	196,979,750	186,480,704	200,834,569	202,405,204	203,833,966
Other paper and board products	176,069,905	158,424,849	189,768,116	174,650,770	179,580,709	181,694,373
Statuettes and other ornaments, of wood	188,872,557	151,258,188	172,217,787	159,577,676	173,182,903	163,623,762
Tableware and kitchenware	155,279,776	126,547,787	148,601,735	152,192,159	162,436,372	159,241,043
Pictures, prints and photographs	125,702,196	106,199,342	141,298,549	126,441,807	151,609,343	148,668,457
Children's picture, drawing or colouring books	96,342,221	104,152,289	122,798,453	131,853,624	139,044,729	139,113,052
Guitars amplified	152,327,898	165,926,340	155,924,836	157,260,235	146,489,516	123,392,005
Caskets and cases	159,719,393	120,251,284	124,343,673	126,333,581	125,896,464	120,342,029
Wooden frames for paintings, photographs, mirrors or similar objects	129,938,778	108,039,167	123,818,940	121,266,281	125,623,330	115,458,951
Parts of furniture	231,385,981	155,259,847	145,990,898	140,334,165	115,713,260	112,752,317
Cups and the like	63,128,025	72,281,760	83,901,833	92,440,685	107,264,985	110,513,805
Acoustic guitars	104,423,178	103,320,625	116,253,227	121,105,550	121,909,740	107,209,868
Trade advertising material and the like	142,850,837	117,512,399	105,423,925	121,533,780	109,325,447	96,753,116
Pencils	90,148,067	86,599,468	99,210,256	100,883,428	105,770,595	95,575,947
Pianos, grand pianos etc.	119,376,492	91,450,453	110,795,708	110,515,244	99,121,276	93,784,663
Clothes hangers	82,429,130	80,809,982	95,499,402	90,527,046	95,578,453	90,458,280
Office furniture	118,735,081	81,138,288	94,812,051	86,824,943	88,146,383	76,429,447
Envelopes, Letter cards etc.	93,734,531	81,405,254	77,820,982	73,919,237	71,397,642	64,556,757
Percussion musical instruments	96,110,879	82,716,687	88,500,673	84,410,947	74,630,996	61,218,643
Apparel and clothing accessories	69,294,376	66,137,516	79,322,894	70,101,897	61,610,302	59,159,137
Furniture for shops (excl. seats)	64,911,698	44,038,098	60,926,334	61,876,987	61,963,370	57,490,419
Calendars	52,951,604	47,979,461	53,526,583	52,349,355	52,203,264	53,064,635

Wind musical instruments	60,690,364	53,432,608	55,885,580	56,382,823	58,409,508	50,294,696
Decalcomanias	46,950,515	37,029,449	43,956,121	42,817,718	45,278,594	43,325,461
Briquettes	-	-	-	-	-	39,471,023
Commercial catalogues	73,055,742	54,948,392	56,842,709	49,186,523	45,710,269	39,417,151
Parts of seats	42,925,999	32,983,487	36,417,712	35,874,789	40,906,178	38,080,831
Wallpaper	40,679,457	27,417,512	30,478,477	30,638,073	33,316,770	37,653,978
Prefabricated buildings	66,291,284	40,808,158	38,050,112	47,612,848	39,910,376	37,597,678
Wooden puzzles	29,248,934	24,373,291	30,469,903	30,039,473	32,239,641	32,179,652
Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood; boot or shoe lasts and trees, of wood	33,635,914	30,845,600	35,465,130	44,247,596	32,221,016	31,139,350
Parts for string musical instruments	23,919,095	23,938,833	27,919,860	26,285,855	29,461,619	27,273,344
Windows, French windows and their frames	56,999,217	37,100,824	41,035,903	35,346,044	31,599,032	25,378,593
Stamp-impressed paper; cheque forms; stock, share or bond certificates and similar documents	36,076,794	33,357,089	21,290,717	24,875,618	28,859,158	25,366,949
Furniture of a kind used in kitchens (excl. seats and elements)	32,297,666	27,533,269	29,427,623	29,970,050	29,936,892	24,943,308
Filter paper and paperboard	20,993,796	17,958,828	27,646,609	26,425,540	29,728,294	23,839,227
Kitchen elements	44,457,113	38,665,061	32,465,857	27,886,186	21,075,721	21,202,836
Mandolins, zithers etc.	10,840,520	9,938,631	12,036,942	14,992,416	18,028,225	15,208,075
Cigarette paper	12,121,875	11,882,717	17,782,591	16,431,719	16,577,275	14,635,937
Unspecified printed matter	14,707,647	12,059,025	18,602,182	13,612,823	11,477,912	14,612,431
Geographic maps and globes	17,284,080	15,044,718	17,458,254	17,457,729	14,789,520	13,311,231
Stamps	10,227,842	12,371,788	7,323,807	7,325,512	10,892,987	13,103,916
Bobbins, spools, cops and similar supports	8,268,451	7,684,684	9,687,756	10,592,588	9,770,889	12,984,286
Music, printed or in manuscript	11,121,633	10,694,547	11,275,632	9,742,826	15,144,674	10,412,805
Shingles and shakes	11,414,393	7,064,021	7,749,017	9,179,916	9,027,138	8,658,034

Parts for pianos	7,861,634	7,171,616	8,416,960	8,273,790	8,135,760	8,375,238
Violins	6,441,170	6,863,998	7,545,930	8,061,521	8,316,358	8,007,606
Self-copy paper	10,922,876	7,672,058	12,602,644	13,566,734	6,593,132	7,609,382
Other string musical instruments	10,131,278	9,211,007	9,578,676	7,069,718	9,260,539	7,559,877
Banknotes	35,826,785	20,793,736	2,693,872	8,954,508	7,635,522	5,491,356
Copying or transfer papers	17,340,387	13,022,722	8,104,465	7,617,350	5,011,407	4,964,537
Plans and drawings for architectural, engineering, industrial, commercial, topographical or similar purposes	3,880,529	3,336,382	7,630,749	3,539,404	4,811,198	3,791,485
Shuttering for concrete constructional work	17,524,676	6,387,872	4,740,076	11,565,536	7,382,343	2,934,079
Wood marquetry and inlaid wood	1,534,752	808,967	1,451,608	2,096,004	2,137,417	1,568,581
Undefined articles of wood	35,688	36,493	-	-	-	-
Total secondary timber products	15,872,337,439	13,857,842,191	15,766,118,897	15,357,968,165	15,778,918,113	14,697,422,636
Primary timber products	17,086,993,146	12,632,997,117	16,440,601,728	16,617,850,849	15,241,048,490	14,363,739,130

Table b.

Ranking of secondary timber products under the EUTR imported by the EU28 based on their total import value (in Euro) for the year 2013 (Source: COMEXT database)

Product group	2008	2009	2010	2011	2012	2013
Packaging of paper and board	1,096,193,544	975,216,338	1,164,700,373	1,232,020,531	1,313,193,158	1,285,858,756
Other furniture (excl. others specified)	1,458,896,673	1,123,536,946	1,266,578,415	1,157,604,606	1,167,264,132	1,044,282,430
Furniture for dining rooms and living rooms (excl. seats)	1,319,465,318	1,058,293,605	1,307,917,707	1,101,026,024	1,154,786,183	960,775,236
Wood pellets	-	222,410,548	352,607,313	445,291,625	652,483,337	878,992,943
Bedroom furniture (excl. seats)	693,332,233	657,140,648	753,051,554	701,976,266	753,516,446	646,973,170
Office articles	439,666,696	387,920,614	455,832,845	447,088,451	458,739,073	426,114,315
Assembled flooring panels	492,452,048	363,073,309	438,292,246	465,549,095	463,506,889	397,546,649
Doors and their frames and thresholds	368,808,966	275,540,366	322,430,451	292,514,317	285,242,663	276,313,248
Hygiene paper	454,457,651	484,559,365	532,905,093	517,239,885	288,789,362	269,982,889
Self-adhesive labels	185,237,818	179,623,311	207,676,477	213,627,820	222,132,916	218,772,144
Other joinery products	335,901,831	246,202,757	277,771,292	279,054,888	261,144,860	214,522,149
Wooden packaging	183,932,606	156,674,630	144,171,445	158,676,040	193,127,220	210,696,167
Other paper and board products	176,069,905	158,424,849	189,768,116	174,650,770	179,580,709	181,694,373
Wooden frames for paintings, photographs, mirrors or similar objects	129,938,778	108,039,167	123,818,940	121,266,281	125,623,330	115,458,951
Parts of furniture	231,385,981	155,259,847	145,990,898	140,334,165	115,713,260	112,752,317
Cups and the like	63,128,025	72,281,760	83,901,833	92,440,685	107,264,985	110,513,805
Office furniture	118,735,081	81,138,288	94,812,051	86,824,943	88,146,383	76,429,447
Envelopes, Letter cards etc.	93,734,531	81,405,254	77,820,982	73,919,237	71,397,642	64,556,757
Apparel and clothing accessories	69,294,376	66,137,516	79,322,894	70,101,897	61,610,302	59,159,137
Furniture for shops (excl. seats)	64,911,698	44,038,098	60,926,334	61,876,987	61,963,370	57,490,419

Briquettes	-	-	-	-	-	39,471,023
Wallpaper	40,679,457	27,417,512	30,478,477	30,638,073	33,316,770	37,653,978
Prefabricated buildings	66,291,284	40,808,158	38,050,112	47,612,848	39,910,376	37,597,678
Windows, French windows and their frames	56,999,217	37,100,824	41,035,903	35,346,044	31,599,032	25,378,593
Furniture of a kind used in kitchens (excl. seats and elements)	32,297,666	27,533,269	29,427,623	29,970,050	29,936,892	24,943,308
Filter paper and paperboard	20,993,796	17,958,828	27,646,609	26,425,540	29,728,294	23,839,227
Kitchen elements	44,457,113	38,665,061	32,465,857	27,886,186	21,075,721	21,202,836
Cigarette paper	12,121,875	11,882,717	17,782,591	16,431,719	16,577,275	14,635,937
Bobbins, spools, cops and similar supports	8,268,451	7,684,684	9,687,756	10,592,588	9,770,889	12,984,286
Shingles and shakes	11,414,393	7,064,021	7,749,017	9,179,916	9,027,138	8,658,034
Self-copy paper	10,922,876	7,672,058	12,602,644	13,566,734	6,593,132	7,609,382
Copying or transfer papers	17,340,387	13,022,722	8,104,465	7,617,350	5,011,407	4,964,537
Shuttering for concrete constructional work	17,524,676	6,387,872	4,740,076	11,565,536	7,382,343	2,934,079
Undefined articles of wood	35,688	36,493	-	-	-	-
Total secondary timber products	8,314,890,638	7,140,151,435	8,340,068,389	8,099,917,097	8,265,155,489	7,870,758,200
Primary timber products	17,066,097,852	12,615,536,924	16,422,063,662	16,599,378,105	15,225,325,631	14,347,924,554

Table c.

Ranking of secondary timber products exempted from the EUTR imported by the EU28 based on their total import value (in Euro) for the year 2013 (Source: COMEXT database)

Product group	2008	2009	2010	2011	2012	2013
Books	1,905,397,904	1,656,037,453	1,710,349,153	1,784,542,714	1,854,935,356	1,686,907,260
Upholstered seats, with wooden frames	2,071,117,583	1,782,834,942	2,130,911,871	1,808,242,244	1,913,721,848	1,648,137,608
Other articles of wood	724,523,612	657,132,424	756,298,870	774,094,808	782,281,609	716,991,774
Other printed matter	253,002,943	241,632,053	282,189,687	297,543,289	335,797,827	295,214,483
Printed or illustrated postcards	205,209,998	204,917,255	221,447,909	246,759,047	242,986,374	230,277,047
Charcoal	157,265,555	194,227,401	191,713,153	200,211,308	200,717,201	204,334,750
Newspapers, journals and periodicals	198,033,751	196,979,750	186,480,704	200,834,569	202,405,204	203,833,966
Statuettes and other ornaments, of wood	188,872,557	151,258,188	172,217,787	159,577,676	173,182,903	163,623,762
Tableware and kitchenware	155,279,776	126,547,787	148,601,735	152,192,159	162,436,372	159,241,043
Pictures, prints and photographs	125,702,196	106,199,342	141,298,549	126,441,807	151,609,343	148,668,457
Children's picture, drawing or colouring books	96,342,221	104,152,289	122,798,453	131,853,624	139,044,729	139,113,052
Guitars amplified	152,327,898	165,926,340	155,924,836	157,260,235	146,489,516	123,392,005
Caskets and cases	159,719,393	120,251,284	124,343,673	126,333,581	125,896,464	120,342,029
Acoustic guitars	104,423,178	103,320,625	116,253,227	121,105,550	121,909,740	107,209,868
Trade advertising material and the like	142,850,837	117,512,399	105,423,925	121,533,780	109,325,447	96,753,116
Pencils	90,148,067	86,599,468	99,210,256	100,883,428	105,770,595	95,575,947
Pianos, grand pianos etc.	119,376,492	91,450,453	110,795,708	110,515,244	99,121,276	93,784,663
Clothes hangers	82,429,130	80,809,982	95,499,402	90,527,046	95,578,453	90,458,280
Percussion musical instruments	96,110,879	82,716,687	88,500,673	84,410,947	74,630,996	61,218,643
Calendars	52,951,604	47,979,461	53,526,583	52,349,355	52,203,264	53,064,635
Wind musical instruments	60,690,364	53,432,608	55,885,580	56,382,823	58,409,508	50,294,696

Decalcomanias	46,950,515	37,029,449	43,956,121	42,817,718	45,278,594	43,325,461
Commercial catalogues	73,055,742	54,948,392	56,842,709	49,186,523	45,710,269	39,417,151
Parts of seats	42,925,999	32,983,487	36,417,712	35,874,789	40,906,178	38,080,831
Wooden puzzles	29,248,934	24,373,291	30,469,903	30,039,473	32,239,641	32,179,652
Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood; boot or shoe lasts and trees, of wood	33,635,914	30,845,600	35,465,130	44,247,596	32,221,016	31,139,350
Parts for string musical instruments	23,919,095	23,938,833	27,919,860	26,285,855	29,461,619	27,273,344
Stamp-impressed paper; cheque forms; stock, share or bond certificates and similar documents	36,076,794	33,357,089	21,290,717	24,875,618	28,859,158	25,366,949
Mandolins, zithers etc.	10,840,520	9,938,631	12,036,942	14,992,416	18,028,225	15,208,075
Unspecified printed matter	14,707,647	12,059,025	18,602,182	13,612,823	11,477,912	14,612,431
Geographic maps and globes	17,284,080	15,044,718	17,458,254	17,457,729	14,789,520	13,311,231
Stamps	10,227,842	12,371,788	7,323,807	7,325,512	10,892,987	13,103,916
Music, printed or in manuscript	11,121,633	10,694,547	11,275,632	9,742,826	15,144,674	10,412,805
Parts for pianos	7,861,634	7,171,616	8,416,960	8,273,790	8,135,760	8,375,238
Violins	6,441,170	6,863,998	7,545,930	8,061,521	8,316,358	8,007,606
Other string musical instruments	10,131,278	9,211,007	9,578,676	7,069,718	9,260,539	7,559,877
Banknotes	35,826,785	20,793,736	2,693,872	8,954,508	7,635,522	5,491,356
Plans and drawings for architectural, engineering, industrial, commercial, topographical or similar purposes	3,880,529	3,336,382	7,630,749	3,539,404	4,811,198	3,791,485
Wood marquetry and inlaid wood	1,534,752	808,967	1,451,608	2,096,004	2,137,417	1,568,581
Total secondary timber products	7,557,446,801	6,717,688,747	7,426,048,498	7,258,049,057	7,513,760,612	6,826,662,423
Primary timber products	20,895,294	17,460,193	18,538,066	18,472,744	15,722,859	15,814,576

ANNEX 4 RANKING OF SECONDARY TIMBER PRODUCTS IMPORTED BY THE NETHERLANDS

The ranking for all secondary timber products that are imported from outside the EU28 by the Netherlands based on their value and derived from the CBS database. The ranking is based on the year 2012 (2013 not available at the time), but import values are also presented for the years 2008-2011. Table a refers to all products, table b is dealing with products under the EUTR and table c contains products exempted from the EUTR.

Table a.

Ranking of secondary timber products imported by the Netherlands based on their total import value (in 1,000 Euro) for the year 2013 (Source: CBS database)

Product group	2008	2009	2010	2011	2012
Upholstered seats, with wooden frames	127,256	124,575	134,829	116,190	133,434
Wood pellets	-	96,092	127,663	107,644	127,788
Books	98,348	90,492	98,555	105,738	106,302
Furniture for dining rooms and living rooms (excl. seats)	139,643	112,774	138,500	108,827	104,344
Other furniture (excl. others specified)	71,123	66,983	86,845	79,479	85,300
Packaging of paper and board	60,120	54,644	62,812	67,711	69,300
Other articles of wood	48,117	41,593	48,282	53,472	61,359
Office articles	38,551	34,988	44,868	49,134	50,168
Other printed matter	12,927	14,700	26,131	37,691	39,438
Other paper and board products	41,792	34,477	33,362	34,080	38,929
Guitars amplified	18,166	37,735	33,433	37,765	38,815
Assembled flooring panels	44,965	31,935	38,867	41,406	38,808
Bedroom furniture (excl. seats)	23,220	25,565	24,571	24,937	30,916
Statuettes and other ornaments, of wood	22,149	16,749	21,885	24,271	30,394
Acoustic guitars	14,900	9,254	15,733	22,786	25,785
Other joinery products	28,761	18,548	23,204	27,119	25,749
Printed or illustrated postcards	23,049	21,992	24,765	32,425	24,516

Doors and their frames and thresholds	33,249	27,153	28,081	27,392	24,099
Tableware and kitchenware	19,743	13,629	17,350	24,378	21,790
Newspapers, journals and periodicals	7,940	12,021	15,927	13,228	19,508
Cups and the like	7,676	9,686	11,615	15,343	18,382
Charcoal	8,599	11,477	10,368	11,272	16,087
Self-adhesive labels	9,013	12,470	11,810	18,545	14,517
Hygiene paper	19,726	24,991	26,279	18,407	11,801
Wooden frames for paintings, photographs, mirrors or similar objects	12,319	8,783	9,685	11,427	11,470
Percussion musical instruments	14,247	10,646	13,009	13,845	9,817
Pictures, prints and photographs	10,160	10,193	14,345	9,853	9,076
Children's picture, drawing or colouring books	3,127	3,646	4,816	7,555	8,931
Pencils	7,506	5,348	6,484	7,584	8,592
Caskets and cases	10,739	8,709	6,775	7,615	8,310
Apparel and clothing accessories	10,545	11,931	9,386	9,204	6,158
Wooden packaging	7,647	4,742	4,554	4,957	5,787
Clothes hangers	2,990	2,886	4,700	5,559	5,281
Pianos, grand pianos etc.	6,822	4,561	5,791	5,779	5,067
Trade advertising material and the like	5,368	17,094	5,259	4,226	4,918
Calendars	3,991	4,123	4,224	3,752	4,829
Parts of furniture	8,846	6,867	4,526	4,302	4,328
Commercial catalogues	5,797	5,381	7,544	5,083	4,319
Office furniture	1,327	1,100	1,819	1,954	3,655
Furniture for shops (excl. seats)	1,719	3,226	3,399	5,364	3,497

Envelopes, Letter cards etc.	2,965	3,566	2,786	2,101	2,953
Wind musical instruments	2,299	2,476	2,213	2,536	2,875
Wallpaper	2,694	2,159	2,383	1,764	2,243
Parts for string musical instruments	1,307	1,343	1,926	2,120	2,039
decalcomanias	2,729	2,484	3,000	2,865	1,975
Stamp-impressed paper; cheque forms; stock, share or bond certificates and similar documents	3,990	4,942	4,148	2,115	1,963
Cigarette paper	1,094	1,791	1,022	2,421	1,893
Filter paper and paperboard	1,340	1,258	1,337	1,367	1,523
Shuttering for concrete constructional work	1,852	347	134	109	1,421
Wooden puzzles	3,778	1,543	2,529	1,568	1,403
Mandolins, zithers etc.	583	700	874	713	1,349
Self-copy paper	1,959	1,484	1,564	1,496	1,239
Prefabricated buildings	3,866	1,791	1,139	1,119	1,152
Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood; boot or shoe lasts and trees, of wood	834	872	991	919	1,018
Copying or transfer papers	695	347	1,081	858	997
Geographic maps and globes	1,096	887	785	608	822
Parts of seats	1,177	452	603	197	624
Music, printed or in manuscript	496	634	591	529	605
Furniture of a kind used in kitchens (excl. seats and elements)	1,252	1,003	783	1,028	591
Stamps	611	295	341	264	563
Other string musical instruments	167	109	246	64	365
Wood marquetry and inlaid wood	74	7	17	594	329
Parts for pianos	236	225	142	183	320

Kitchen elements	208	546	677	877	275
Windows, French windows and their frames	703	1,208	278	302	169
Plans and drawings for architectural, engineering, industrial, commercial, topographical or similar purposes	115	110	381	162	156
Violins	214	183	271	205	107
Bobbins, spools, cops and similar supports	287	118	156	34	74
Banknotes	1,478	721	1,352	5	50
Shingles and shakes	126	104	53	140	14
Total	1,074,416	1,089,473	1,247,864	1,238,573	1,294,683

Table b.

Ranking of secondary timber products under the EUTR imported by the Netherlands based on their total import value (in 1,000 Euro) for the year 2013 (Source: CBS database)

Product group	2008	2009	2010	2011	2012
Wood pellets	-	96,092	127,663	107,644	127,788
Furniture for dining rooms and living rooms (excl. seats)	139,643	112,774	138,500	108,827	104,344
Other furniture (excl. others specified)	71,123	66,983	86,845	79,479	85,300
Packaging of paper and board	60,120	54,644	62,812	67,711	69,300
Office articles	38,551	34,988	44,868	49,134	50,168
Other paper and board products	41,792	34,477	33,362	34,080	38,929
Assembled flooring panels	44,965	31,935	38,867	41,406	38,808
Bedroom furniture (excl. seats)	23,220	25,565	24,571	24,937	30,916
Other joinery products	28,761	18,548	23,204	27,119	25,749
Doors and their frames and thresholds	33,249	27,153	28,081	27,392	24,099
Cups and the like	7,676	9,686	11,615	15,343	18,382
Self-adhesive labels	9,013	12,470	11,810	18,545	14,517
Hygiene paper	19,726	24,991	26,279	18,407	11,801
Wooden frames for paintings, photographs, mirrors or similar objects	12,319	8,783	9,685	11,427	11,470
Apparel and clothing accessories	10,545	11,931	9,386	9,204	6,158
Wooden packaging	7,647	4,742	4,554	4,957	5,787
Parts of furniture	8,846	6,867	4,526	4,302	4,328
Office furniture	1,327	1,100	1,819	1,954	3,655
Furniture for shops (excl. seats)	1,719	3,226	3,399	5,364	3,497
Envelopes, Letter cards etc.	2,965	3,566	2,786	2,101	2,953
Wallpaper	2,694	2,159	2,383	1,764	2,243

Cigarette paper	1,094	1,791	1,022	2,421	1,893
Filter paper and paperboard	1,340	1,258	1,337	1,367	1,523
Shuttering for concrete constructional work	1,852	347	134	109	1,421
Self-copy paper	1,959	1,484	1,564	1,496	1,239
Prefabricated buildings	3,866	1,791	1,139	1,119	1,152
Copying or transfer papers	695	347	1,081	858	997
Furniture of a kind used in kitchens (excl. seats and elements)	1,252	1,003	783	1,028	591
Kitchen elements	208	546	677	877	275
Windows, French windows and their frames	703	1,208	278	302	169
Bobbins, spools, cops and similar supports	287	118	156	34	74
Shingles and shakes	126	104	53	140	14
Total	579,283	602,677	705,239	670,848	689,540

Table c.

Ranking of secondary timber products exempted from the EUTR imported by the Netherlands based on their total import value (in 1,000 Euro) for the year 2012 (Source: CBS database)

Product group	2008	2009	2010	2011	2012
Upholstered seats, with wooden frames	127,256	124,575	134,829	116,190	133,434
Books	98,348	90,492	98,555	105,738	106,302
Other articles of wood	48,117	41,593	48,282	53,472	61,359
Other printed matter	12,927	14,700	26,131	37,691	39,438
Guitars amplified	18,166	37,735	33,433	37,765	38,815
Statuettes and other ornaments, of wood	22,149	16,749	21,885	24,271	30,394
Acoustic guitars	14,900	9,254	15,733	22,786	25,785
Printed or illustrated postcards	23,049	21,992	24,765	32,425	24,516
Tableware and kitchenware	19,743	13,629	17,350	24,378	21,790
Newspapers, journals and periodicals	7,940	12,021	15,927	13,228	19,508
Charcoal	8,599	11,477	10,368	11,272	16,087
Percussion musical instruments	14,247	10,646	13,009	13,845	9,817
Pictures, prints and photographs	10,160	10,193	14,345	9,853	9,076
Children's picture, drawing or colouring books	3,127	3,646	4,816	7,555	8,931
Pencils	7,506	5,348	6,484	7,584	8,592
Caskets and cases	10,739	8,709	6,775	7,615	8,310
Clothes hangers	2,990	2,886	4,700	5,559	5,281
Pianos, grand pianos etc.	6,822	4,561	5,791	5,779	5,067
Trade advertising material and the like	5,368	17,094	5,259	4,226	4,918
Calendars	3,991	4,123	4,224	3,752	4,829

Commercial catalogues	5,797	5,381	7,544	5,083	4,319
Wind musical instruments	2,299	2,476	2,213	2,536	2,875
Parts for string musical instruments	1,307	1,343	1,926	2,120	2,039
decalcomanias	2,729	2,484	3,000	2,865	1,975
Stamp-impressed paper; cheque forms; stock, share or bond certificates and similar documents	3,990	4,942	4,148	2,115	1,963
Wooden puzzles	3,778	1,543	2,529	1,568	1,403
Mandolins, zithers etc.	583	700	874	713	1,349
Tools, tool bodies, tool handles, broom or brush bodies and handles, of wood; boot or shoe lasts and trees, of wood	834	872	991	919	1,018
Geographic maps and globes	1,096	887	785	608	822
Parts of seats	1,177	452	603	197	624
Music, printed or in manuscript	496	634	591	529	605
Stamps	611	295	341	264	563
Other string musical instruments	167	109	246	64	365
Wood marquetry and inlaid wood	74	7	17	594	329
Parts for pianos	236	225	142	183	320
Plans and drawings for architectural, engineering, industrial, commercial, topographical or similar purposes	115	110	381	162	156
Violins	214	183	271	205	107
Banknotes	1,478	721	1,352	5	50
Total	493,125	484,787	540,615	565,714	603,131

ANNEX 5 EU28-EXTRA IMPORTS OF WOOD PELLETS

Countries of origin of the EU28 extra imports (value in Euro and quantity in tons) of wood pellets for the EU28 in total for the year 2013 and for the Netherlands for the year 2012.

Figure a.

Countries of origin of the EU28-extra imports of wood pellets by the EU28 in 2013 based on the value (in Euro)
(source: COMEXT database)

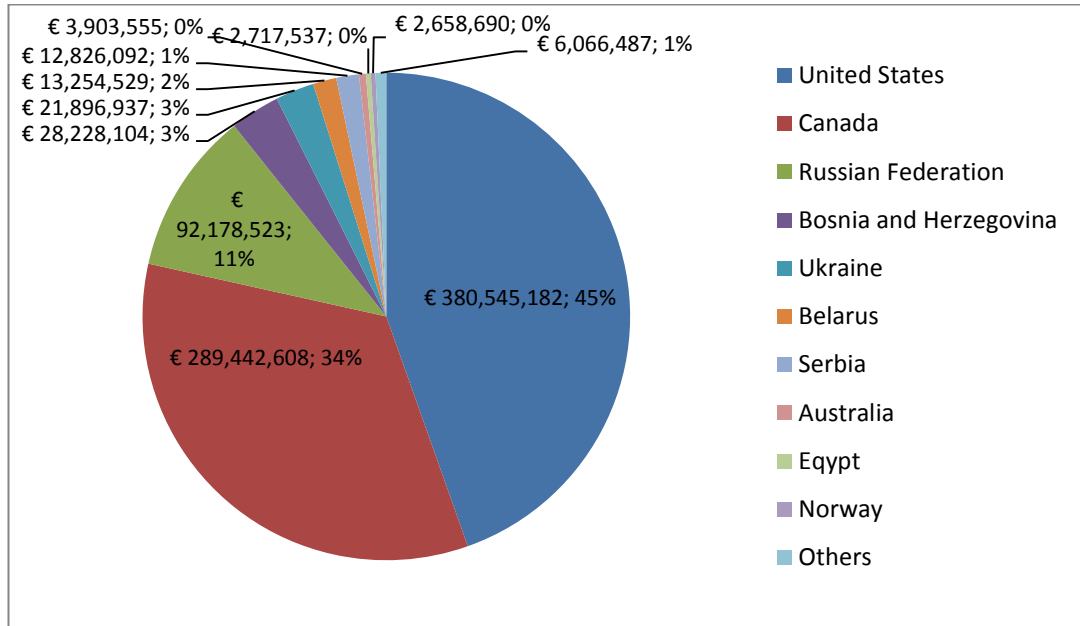


Figure b.

Countries of origin of the EU28-extra imports of wood pellets by the EU28 in 2013 based on quantity (in tons)
(source: COMEXT database)

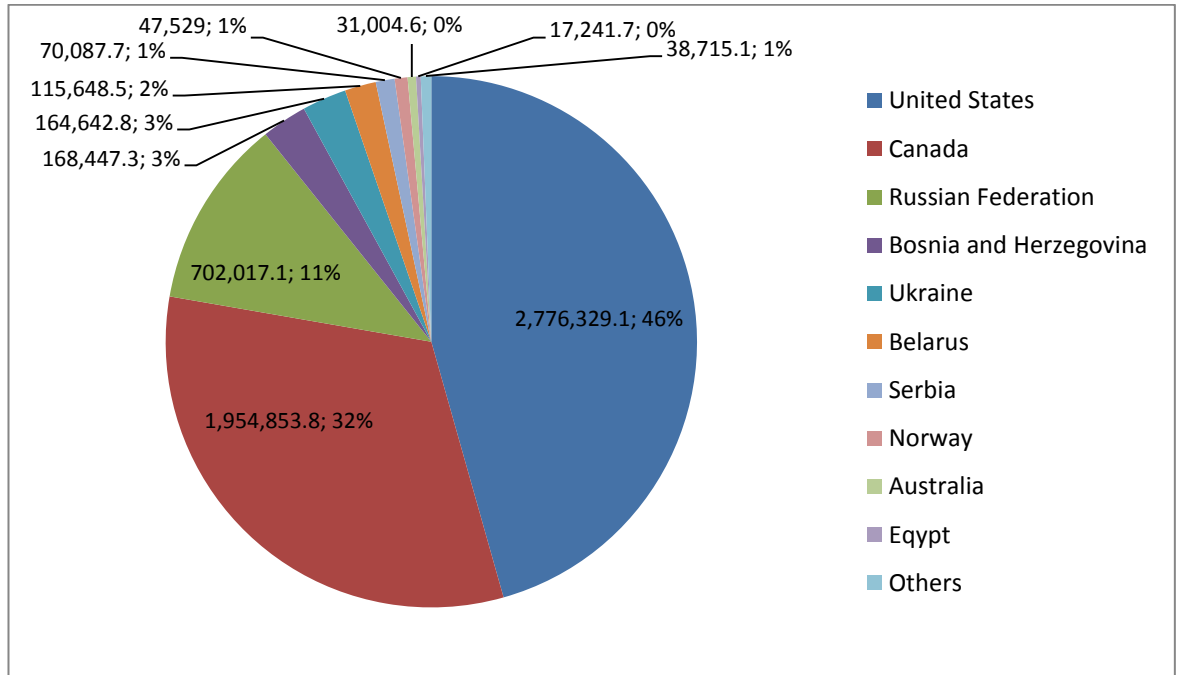


Figure c.

Countries of origin of the EU28-extra imports of wood pellets by the Netherlands in 2013 based on the value (in Euro) (source: COMEXT database)

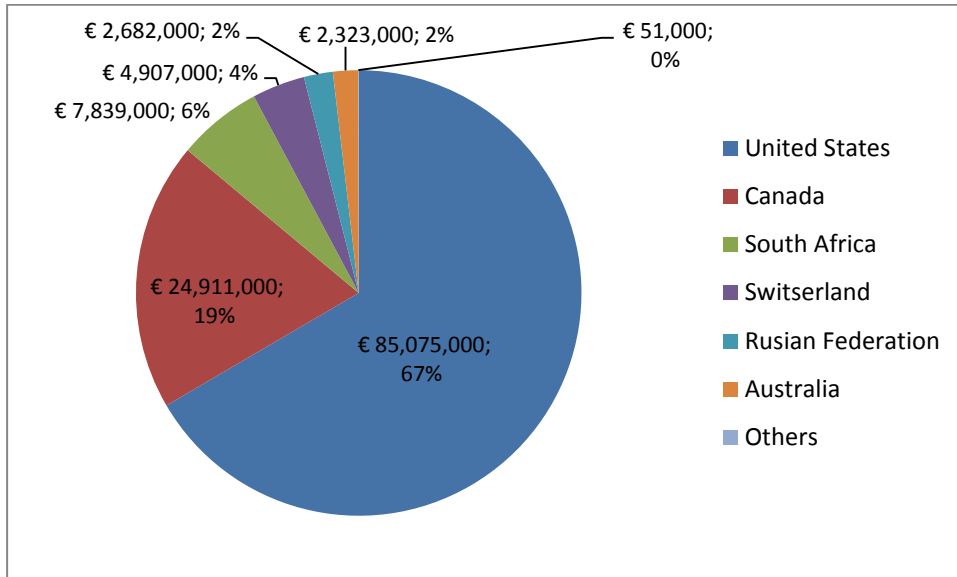
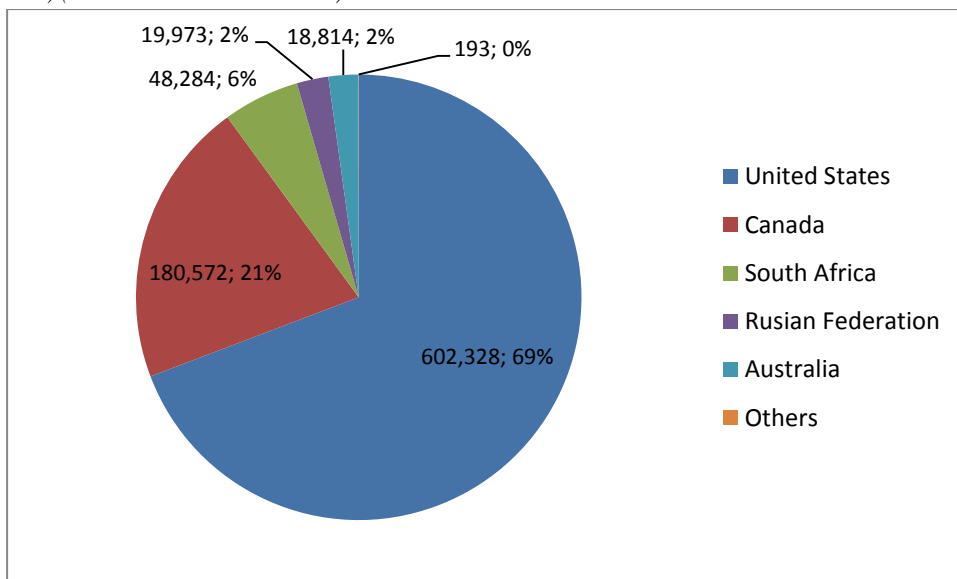


Figure d.

Countries of origin of the EU28-extra imports of wood pellets by the Netherlands in 2013 based on quantity (in tons) (source: COMEXT database)



ANNEX 6 ENQUIRY

List of standard questions used during the interviews (in Dutch)

Companies

1. Is it correct that you sell <name product group>? Yes/No
2. In the CBS-trade statistics the following CN-code <code> and this description are given to this product group: <description>. Can you describe what products are generally concerned?
3. Do the products entirely (100%) consist of wood/timber? Yes/No
 - a. If not: what is the average share of wood/timber?
 - b. If wood/timber is used:
 - i. Are solid timber or wood based panels used? Solid/panels/both
 - ii. Is it softwood³⁰ or hardwood³¹? softwood/hardwood/don't know
 1. If hardwood is used:
 - a. Is it tropical hardwood? Yes/No/don't know
 - b. If tropical:
 - i. Does it originate from plantations or is it in another way considered as a residual product (e.g. rubberwood)?
plantation/natural forest/don't know
 - iii. Do you know the timber species? Yes/No
 1. If yes: what timber species are used?
4. According to the CBS trade statistics the import quantity from outside the EU28 was <quantity> pieces/tons/etc. (*specify*) in 2012. What share of this import quantity is taken by your company? ... %
5. Are you familiar with certification systems for sustainable forest management, such as FSC and PEFC?
6. Do you sell products with a certificate for sustainable forest management, such as FSC or PEFC? Yes/No
 - a. If yes:
 - i. Which share? ... %
 - ii. With which certificate?
 - iii. Does the share without a certificate for sustainable forest management contain any other claim for sustainability or legality?
7. The CBS trade statistics indicate that <country> is the main country of origin outside of the EU28, followed by <country> and <country>.
 - a. Do you agree to this? Yes/No/don't know
 - b. Is this the same for your products? Yes/No/don't know
 - i. If not: what are the main countries of origin of the products that you import from outside the EU28?
 - c. Countries like China and ... do import a large share of the timber they need as raw material input to their production. Do you know the country of origin of the timber that is used as raw material for you products? Yes/No
 - i. If yes: could you mention the country(ies)?

³⁰ Wood/timber from coniferous tree species.

³¹ Wood/timber from broadleaved tree species deciduous or tropical

Sector organizations

1. Could you or a colleague inform me about the structure of this industry or sector?
Yes/No
 - a. If yes: *go to the list of questions above and select the relevant questions + and add the two questions below*
2. Which companies do import and/or sell substantial quantities of the specific product group ...?
3. Is it possible for you to provide contact persons within these companies / two whom can you refer me to?

ANNEX 7 LIST OF LARGE COMPANIES WITHIN THE HOME FURNISHING MARKET IN THE NETHERLANDS

List of large companies within the home furnishing market in the Netherlands (source: Inretail (<http://www.inretail.nl/pages/696/Marktonderzoeken/Samenwerking--Ketens-Wonen.html>) and Probos)

Company	Category	Number of outlets
Ikea	Department store	10-20
Jysk	Department store	20-60
Rivièra Maison	Department store	18
Trendhopper	Department store	20-60
Kwantum	Department store	100-120
Leenbakker	Department store	100-120
Budget Home Store	Furniture specialist	10-20
Haco	Furniture specialist	10-20
Natuzzi	Furniture specialist	10-20
Novastyle	Furniture specialist	10-20
Otak	Furniture specialist	10-20
Rofra	Furniture specialist	10-20
Sanders	Furniture specialist	10-20
Goossens Wonen en Slapen	Furniture specialist	11
Eijerkamp	Department store	2
Seats and Sofas	Furniture specialist	20-40
Lifestyle meubel	Department store	10-20
Montel	Furniture specialist	20-40
Profijt Meubel	Furniture specialist	33
Prominent	Furniture specialist	40-50
Pronto wonen	Furniture specialist	21
In.House	Furniture specialist	32

ANNEX 8 WAARDE VAN DE NEDERLANDSE IMPORT VAN PRIMAIRE- EN SECUNDAIRE HOUTPRODUCTEN IN DE PERIODE 2008-2012

Door: Jan Oldenburger, Stichting Probos

Tabel 1 geeft een beeld van de verdeling van de Nederlandse importwaarde (in 1.000 Euro) van houtproducten in de periode 2008-2012. De import is onderverdeeld naar primaire en secundaire houtproducten. Daarnaast is onderscheid gemaakt tussen import vanuit de EU28 (EU28-intra) en import van buiten de EU28 (EU28-extra). De percentages in tabel 1 hebben betrekking op het aandeel van de EU28-extra en EU28-intra import binnen de importwaarde voor primaire-, secundaire houtproducten en het totaal.

Tabel 1

Waarde van de Nederlandse import van primaire- en secundaire houtproducten in de periode 2008-2012. Onderverdeeld naar de EU28-extra en EU28-intra import en de aandelen daarvan binnen de totalen.

Primair/secundair	Jaar	Invoerwaarde (in 1.000 Euro)				
		Totaal	EU28-extra	Share of EU28-extra in total	EU28-intra	Share of EU28-intra in total
Primair	2008	€ 5.899.671	€ 1.021.264	17%	€ 4.878.407	83%
Secundair	2008	€ 5.240.093	€ 1.072.398	20%	€ 4.167.695	80%
Totaal	2008	€ 11.139.764	€ 2.093.662	19%	€ 9.046.102	81%
Primair	2009	€ 4.347.569	€ 706.554	16%	€ 3.641.015	84%
Secundair	2009	€ 4.771.010	€ 1.087.464	23%	€ 3.683.546	77%
Totaal	2009	€ 9.118.579	€ 1.794.018	20%	€ 7.324.561	80%
Primair	2010	€ 5.241.153	€ 988.268	19%	€ 4.252.885	81%
Secundair	2010	€ 4.924.826	€ 1.245.849	25%	€ 3.678.977	75%
Totaal	2010	€ 10.165.979	€ 2.234.117	22%	€ 7.931.862	78%
Primair	2011	€ 5.486.733	€ 994.662	18%	€ 4.492.071	82%
Secundair	2011	€ 4.942.294	€ 1.236.562	25%	€ 3.705.732	75%
Totaal	2011	€ 10.429.027	€ 2.231.224	21%	€ 8.197.803	79%
Primair	2012	€ 5.195.043	€ 951.377	18%	€ 4.243.666	82%
Secundair	2012	€ 4.740.817	€ 1.292.661	27%	€ 3.448.156	73%
Totaal	2012	€ 9.935.860	€ 2.244.038	23%	€ 7.691.822	77%

Tabel 2 geeft opnieuw de waarde van de Nederlandse import van primaire- en secundaire houtproducten in de periode 2008-2012. De in tabel 2 gepresenteerde percentages hebben echter betrekking op het aandeel van respectievelijk primaire- en secundaire houtproducten binnen respectievelijk de totale import de EU28-extra import en de EU28-intra import.

Tabel 2

Waarde van de Nederlandse import van primaire en secundaire houtproducten in de periode 2008-2012. Onderverdeeld naar de EU28-extra en EU28-intra import en de aandelen van primair en secundaire houtproducten binnen het totaal, de EU28-extra import en EU28-intra import.

Primair/secundair	Jaar	Invoerwaarde (in 1.000 Euro)			Shares of primair en secundair		
		Totaal	EU28-extra	EU28-intra	Total	EU28-extra	EU28-intra
Primair	2008	5.899.671	1.021.264	4.878.407	53%	49%	54%
Secundair	2008	5.240.093	1.072.398	4.167.695	47%	51%	46%
Totaal	2008	11.139.764	2.093.662	9.046.102			
Primair	2009	4.347.569	706.554	3.641.015	48%	39%	50%
Secundair	2009	4.771.010	1.087.464	3.683.546	52%	61%	50%
Totaal	2009	9.118.579	1.794.018	7.324.561			
Primair	2010	5.241.153	988.268	4.252.885	52%	44%	54%
Secundair	2010	4.924.826	1.245.849	3.678.977	48%	56%	46%
Totaal	2010	10.165.979	2.234.117	7.931.862			
Primair	2011	5.486.733	994.662	4.492.071	53%	45%	55%
Secundair	2011	4.942.294	1.236.562	3.705.732	47%	45%	45%
Totaal	2011	10.429.027	2.231.224	8.197.803			
Primair	2012	5.195.043	951.377	4.243.666	52%	42%	55%
Secundair	2012	4.740.817	1.292.661	3.448.156	48%	58%	45%
Totaal	2012	9.935.860	2.244.038	7.691.822			

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