

The UK Timber Market

Where are we now?

Softwood market

Hardwood market

Species for the future

By Oliver Combe.



Where are we now?

Import driven market

High stocks in Sweden and Baltic's

Strong pound

Weak performance in other world markets?

UK economy "relatively" active

We are now the dumping ground!

UK producers market share under threat?

Log prices will follow sawn timber prices down!

Activity levels likely to fall over winter





Conifers are the economic core of the timber market

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Softwood market

- Aggressive selling of Swedish and Baltic stock
- High stock levels for both importers and domestic mills
- Real pain is in the Kiln dried graded sector
- Unseasoned and packaging markets have held up reasonably well
- Seasonal slowdown starting to be felt.
- Short term pain but wood consumption rising.
- The softwood market accounts for 66% of the UK wood products traded. (TTF 2013 stats).
- UK production 3.5 million m3 in 2013 and rising by 6%

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Niche Softwood markets

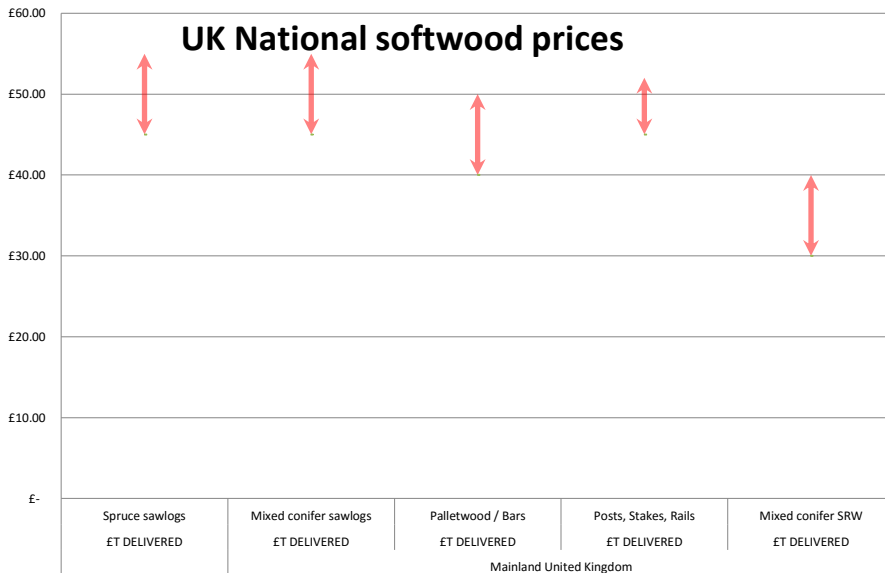
- Buyers are interested small parcels of;
- Douglas fir 6.2m and longer over 40cm TDUB
- Tree length larch (12m and 30cm plus TDUB.
- Western Red Cedar 3.6m and 4.8m 30cm plus TDUB
- All rot free, straight, knots below 5cm.
- For these species buyers will travel so worth advertising nationally
- Small markets, easily oversupplied.

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Niche markets are small scale and specialised.

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Sawn Hardwood market.

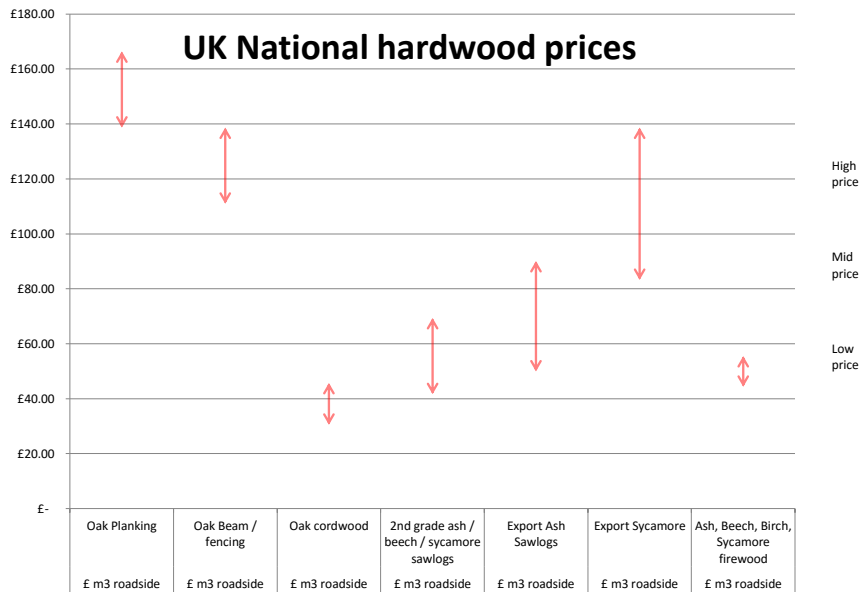
- Oak is by far the dominant species for sawlogs.
- Good prices can be obtained for all grades of oak from sleepers (short logs) at £85 per tonne delivered through to planking oak at £165m³
- Export markets are developing for ash and poplar
- Sweet chestnut appears to be coming back into fashion
- Other species are difficult (Beech, Yew, Sycamore).
- Hardwood accounts for 3% of the UK wood products traded. (UK production 46,000m³ in 2013 and fell by 6%).

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Niche Hardwood markets

- Buyers are interested in single trees and small parcels of;
- Burrs and patch burrs of, elm, oak, ash, London plane and horse chestnut
- Walnut, sound stems.
- True Cedars (Deodar, Atlas and Lebanon).
- Yew appears to have fallen out of fashion
- Sycamore can still attract high prices but the volumes required are very low currently.

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Oak good prices but pressure from imports.

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Species for the future

Softwoods

Spruce (Sitka and Norway),

Douglas fir,

Scots Pine,

Western Red Cedar,

Western Hemlock???,

Why?

Tried and tested in markets,

Versatile,

Key physical properties,

Information and technical knowledge available.

Hardwoods

Oak

Birch

Sycamore

Beech

Robinia ????

CRITICAL MASS IS VITAL FOR THE FUTURE.

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Thank you



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