

The following data provides a comprehensive view of recent activity in the wood and wood products sector, with a special focus on construction activity.

The data covers:

- Import figures for wood and wood products (Jul-Dec 2008 and Jan-Jun 2009)
- Export figures for wood and wood products (Jul-Dec 2008 and Jan-Jun 2009)
- Wholesale price index – September 2009
  - Wood and wood products
  - Energy products purchased by manufacturing industry
- Homebond and premier guarantee registrations
- National house completions
- National house commencements
- Number of planning permissions granted by type of construction

The total imports for wood and wood products for the first half of 2009 are 64% when compared to the figures for the second half of 2008. Whilst there was growth in the “fuel wood (excluding wood waste) and wood charcoal” area, all other areas experienced decline.

The export figures for first half of 2009 are stronger than wood and wood products imports, relatively stable at 86% when compared to the second half of 2008. Growth was evident in two sub-sectors, namely “fuel wood (excluding wood waste) and wood charcoal” plus “wood in chips or particles and wood waste”. The UK remains the leading destination for wood and wood product exports, with 80% of exports bound for the UK from January to June 2009.

The wholesale price index (WPI) for September 2009 reflects an annual percentage decrease for wood and wood products. “Other timber” experienced the largest decline, with an 11% drop over the course of 12 months. The WPI for energy products purchased by manufacturing industry reflects a decline in prices for all fuel types listed.

Activity in the construction sector indirectly affects other streams of activity in the forestry and forest products sector. Difficult trading conditions are likely to persist during 2010 as demand continues very weak and Ireland’s economy remains. The Homebond and premier guarantee registrations are a useful indicator of recent building activity. Registrations are recorded subsequent to commencements and exclude all builders who are not registered with the national guarantee/insurance Homebond and Premier Guarantee schemes as well as one-off housing and public sector units. Joint registrations in 2009 were down 75% on September 2008 figures.

The National House Completions figures for September 2009, published by the Department of the Environment, Heritage and Local Government, illustrate a decline of 50% when compared to the same month in 2008.

National House Commencements data is collected on a monthly basis from Residential Commencement Notices, received by all of the 37 Building Control Authorities. According to the data, no residential units commenced neither in Waterford City Council nor Limerick City Council in August 2009.

The final chart details the number of planning permissions granted by type of construction. The total number of permissions granted during Q2 2009 is 60% of the number granted for the same period last year. Alterations and conversions for Q2 2009 are at 72% when compared to Q2 2008, with 504 permissions granted.

## Wood and wood product imports: 2nd half 2008 v 1<sup>st</sup> half 2009

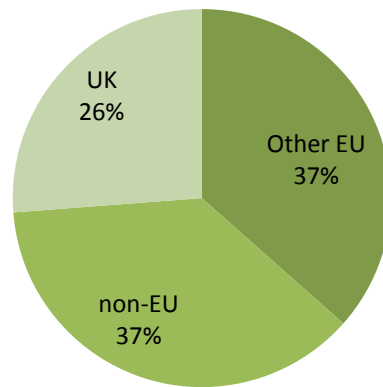
SITC	Description
245	<b>FUEL WOOD (EXCLUDING WOOD WASTE) AND WOOD CHARCOAL</b>
246	<b>WOOD IN CHIPS OR PARTICLES AND WOOD WASTE</b>
247	<b>WOOD IN THE ROUGH, WHETHER OR NOT STRIPPED OF BARK OR SAPWOOD, OR ROUGHLY SQUARED</b>
248	<b>WOOD, SIMPLY WORKED, AND RAILWAY SLEEPERS OF WOOD</b>
634	<b>VENEERS, PLYWOOD, PARTICLE BOARD, AND OTHER WOOD, WORKED, N.E.S.</b>
635	<b>WOOD MANUFACTURES, N.E.S.</b>

SITC	Other EU 2 08 € 000	non-EU 2 08 € 000	UK 2 08 € 000	Total imports 2nd half 08	Other EU 1 09 € 000	non-EU 1 09 € 000	UK 1 09 € 000	Total imports 1st half 09	Total imports 2 08/ 1 09
245	1215	364	206	1785	1839	74	329	2242	126%
246	124	393	808	1325	56	161	297	514	39%
247	12515	2249	7200	21964	9,631	1,348	4,305	15,284	70%
248	29086	32023	12472	73581	12831	18894	11033	42758	58%
634	16412	16397	19980	52789	9799	8152	15780	33731	64%
635	23439	32957	18717	75113	15236	22249	13518	51003	68%
<b>TOTAL</b>	<b>82,791</b>	<b>84383</b>	<b>59383</b>	<b>226,557</b>	<b>49,392</b>	<b>50,878</b>	<b>45,262</b>	<b>145,532</b>	<b>64%</b>

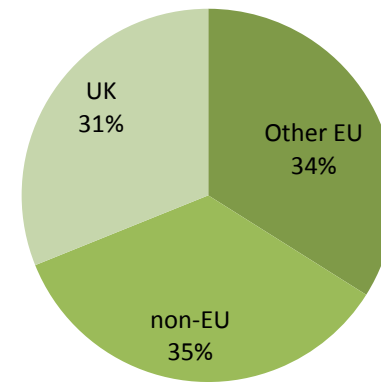
Source: CSO

## Wood and wood products imports: 2<sup>nd</sup> half 2008 v 1<sup>st</sup> half 2009

**Origin of imports - Jul-Dec 2008**



**Origin of imports - Jan-Jun 2009**



Source: CSO

## Wood and wood products exports: 2<sup>nd</sup> half 2008 v 1<sup>st</sup> half 2009

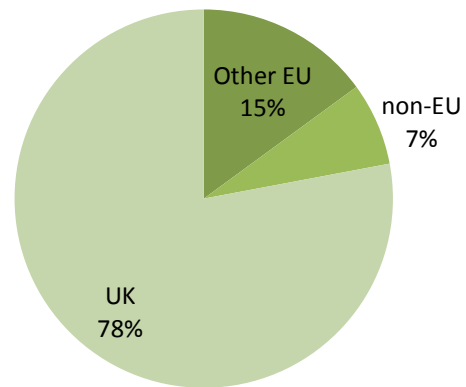
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SITC	Other EU 2 08 € 000	non-EU 2 08 € 000	UK 2 08 € 000	Total exports 2nd half 08	Other EU 1 09 € 000	non-EU 1 09 € 000	UK 1 09 € 000	Total exports 1st half 09	Total exports 2 08/ 1 09
245	0	0	0	1	0	0	94	94	9400%
246	15	51	318	384	0	23	390	413	108%
247	5	158	7251	7414	1	98	6,061	6,160	83%
248	732	6	22456	23194	30	124	21,682	21,836	94%
634	17194	7640	57221	82055	18,727	1,077	49,141	68,945	84%
635	568	928	9335	10831	699	1,072	7,329	9,100	84%
<b>TOTAL</b>	<b>18,514</b>	<b>8,783</b>	<b>96,581</b>	<b>123878</b>	<b>19,457</b>	<b>2,394</b>	<b>84,697</b>	<b>106,548</b>	<b>86%</b>

Source: CSO

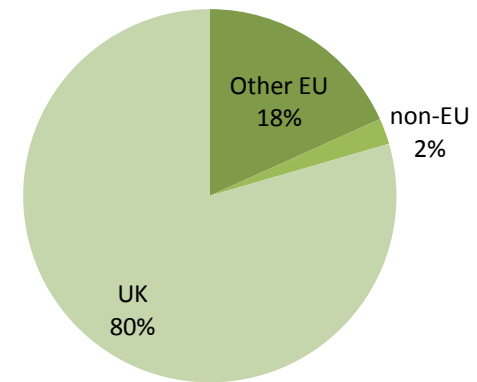
## Wood and wood products exports: 2<sup>nd</sup> half 2008 v 1<sup>st</sup> half 2009

**Destination of exports - Jul- Dec 2008**



Source: CSO

**Destination of exports - Jan-Jun 2009**



# Wholesale Price Index

## Wood and wood products - Wholesale Price Index - September 2009

Base: Year 2000 as 100

Material	Index		Monthly % change Sep-09	Annual % change Sep-08-Sep-09
	Aug-09	Sep-09		
Wood and wood products	110.3	110.3	-	-0.7%
Rough Timber (including plain sawn)	101.6	101.8	0.2%	-4.9%
Hardwood	104.8	104.8	-	-3.3%
Other	100.8	101.1	0.3%	-0.5%
Other timber	113.5	113.5	-	-5.4%
Windows and doors	113.9	113.8	-0.1%	-0.2%
Other	98.9	98.9	-	-11.0%

Source: CSO

Overall, annual manufacturing prices were down 3.5% in September. The wood and wood products annual percentage decrease for September 2009 is therefore relatively modest in comparative terms. On the building and construction front, “all material” prices increased by 0.1% in September 2009, when compared to the previous month.

# Wholesale Price Index

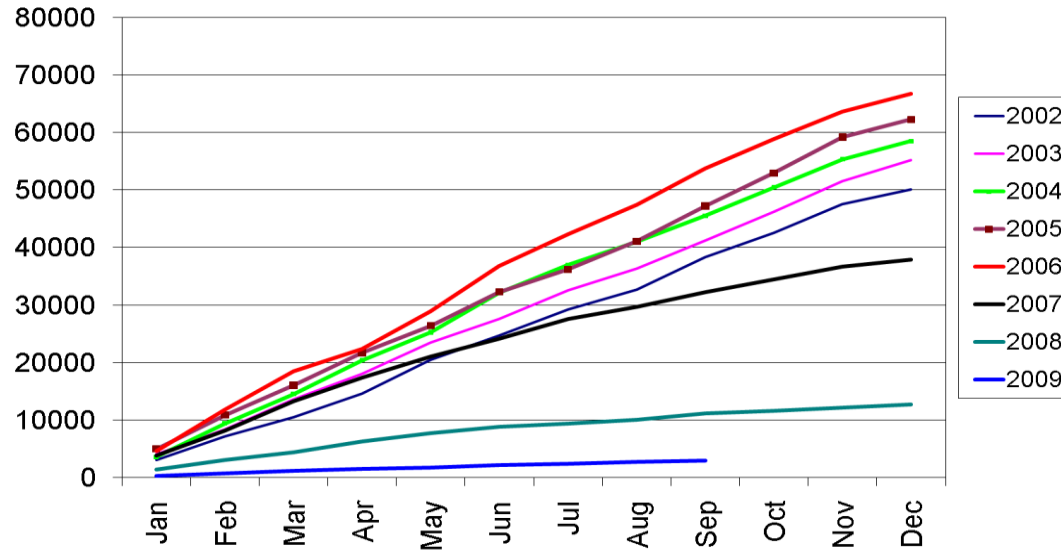
**Wholesale Price Indices (excl. VAT) for Energy Products (i.e. Fuels) purchased by Manufacturing Industry**  
Base: Year 2000 as 100

Energy Fuels	Index		Monthly % change	Annual % change Aug 2008- Aug 2009
	Jul-09	Aug-09		
Petrol	146.9	155.5	5.9%	-2.1%
Autodiesel	135.3	144.6	6.9%	-14.7%
Gas oil (other than autodiesel)	137.3	152	10.7%	-26.4%
Fuel oil	160.1	176.6	10.3%	-17.9%
Electricity	167.4	167.4	-	-13.8%
Petroleum fuels (energy products excl. electricity)	146.7	159.8	8.9%	-16.6%
Energy products	158.9	162.7	2.4%	-14.6%

Source: CSO

The price of Energy products decreased by 15.1% in the year since September 2008, while Petroleum fuels decreased by 18.3%.

## Homebond + Premier Guarantee Cumulative registrations



Source: Homebond and Premier Guarantee

Registrations are recorded subsequent to commencements and exclude all builders who are not registered with the national guarantee/insurance Homebond and Premier Guarantee schemes as well as one-off housing and public sector units.

- There were 267 joint registrations in September 2009, down 75% on September 2008.
- For the 9 months to September 2009 there were 2,945 registrations, resulting in a decline of 73% when compared to the same period up to September 2008.
- July-September (available data for last 3 months) registrations were down by 63% on the same period in 2008.
- April-September (available data for last 6 months) registrations are running at 26% for the figures for the same period in the previous year.



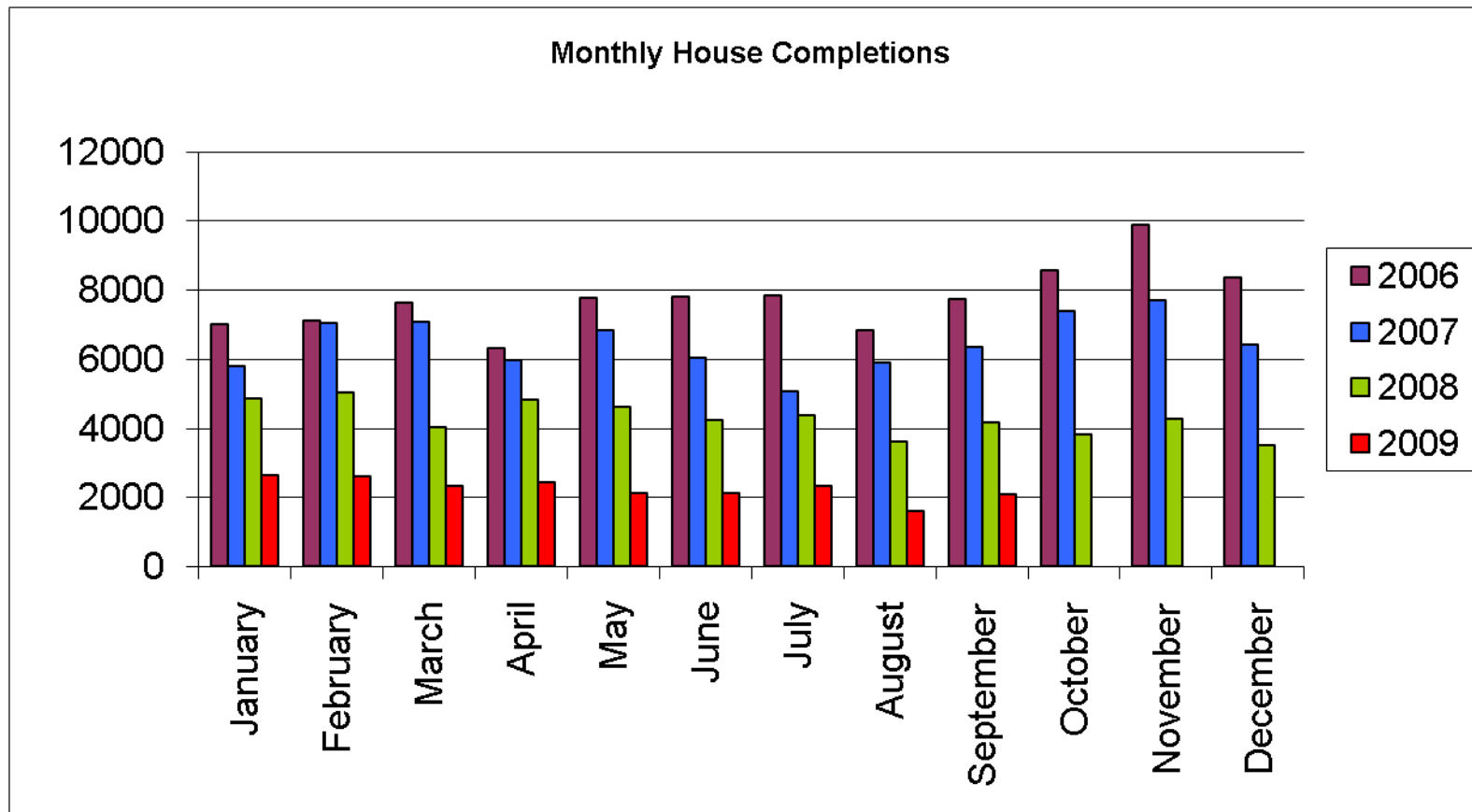
## National House Completions

	2006	2007	2008	2009	2009/2008
January	7,024	5,788	4,858	2,659	55%
February	7,112	7,052	5,029	2,613	52%
March	7,658	7,078	4,023	2,339	58%
Conversions	100	100	100	100	100%
<b>Quarter-total</b>	<b>21,894</b>	<b>20,018</b>	<b>14,010</b>	<b>7,711</b>	<b>55%</b>
April	6,326	5,964	4,848	2,430	50%
May	7,777	6,832	4,540	2,121	47%
June	7,802	6,064	4,238	2,117	50%
Conversions	100	100	100	100	100%
<b>Quarter-total</b>	<b>22,005</b>	<b>18,960</b>	<b>13,726</b>	<b>6,768</b>	<b>49%</b>
July	7,853	5,062	4,373	2,354	54%
August	6,861	5,903	3,605	1,628	45%
September	7,757	6,362	4,172	2,096	50%
Conversions	100	100	100		
<b>Quarter-total</b>	<b>22,571</b>	<b>17,427</b>	<b>12,250</b>		
October	8,586	7,397	3,827		
November	9,899	7,696	4,277		
December	8,364	6,429	3,534		
Conversions	100	100	100		
<b>Quarter-total</b>	<b>26,949</b>	<b>21,622</b>	<b>11,738</b>		
<b>Annual Totals</b>	<b>93,419</b>	<b>78,027</b>	<b>51,724</b>		

Source: Department of Environment, Heritage & Local Government

House completions data series are based on the number of new dwellings connected by ESB Networks to the electricity supply and may not accord precisely with local authority boundaries. These represent the number of homes completed and available, and do not reflect any work-in progress.

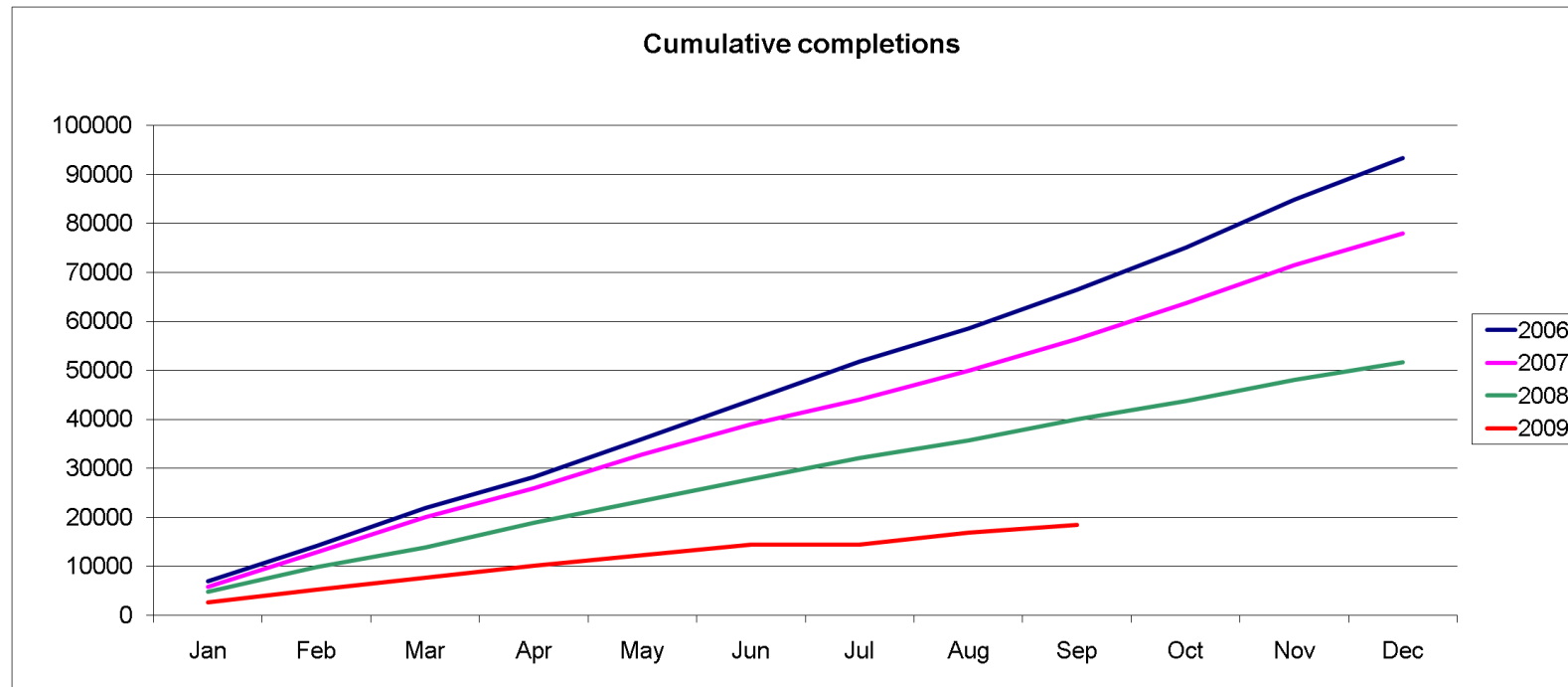
## National House Completions



Source: Department of Environment, Heritage & Local Government

House completions for September 2009 were 50% of the completions recorded in September 2008.

## National House Completions



Source: Department of Environment, Heritage & Local Government

## National House Commencements

### Total number of residential units commenced (26 counties)

#### Monthly Totals

	January	February	March	April	May	June	July	August	September	October	November	December
2004	5,984	7,148	7,570	6,653	7,819	7,624	6,330	6,066	5,303	7,037	5,899	4,258
2005	4,680	6,538	7,552	7,014	7,537	6,483	6,850	7,827	7,473	5,202	6,278	4,275
	78%	91%	100%	105%	96%	85%	108%	129%	141%	74%	106%	100%
2006	5,850	5,648	6,843	6,783	7,129	8,563	6,529	7,227	5,238	5,836	5,737	4,219
	125%	86%	91%	97%	95%	132%	95%	92%	70%	112%	91%	99%
2007	5,782	5,774	5,299	4,613	5,017	5,262	3,497	3,097	2,982	2,835	2,767	1,951
	99%	102%	77%	68%	70%	61%	54%	43%	57%	49%	48%	46%
2008	2,730	2,790	2,193	2,617	2,524	2,532	1,935	1,376	1,194	1,208	917	913
	47%	48%	41%	57%	50%	48%	55%	44%	40%	43%	33%	47%
2009	752	903	806	778	731	885	962	579				
	28%	32%	37%	30%	29%	35%	50%	42%				

Source: Department of Environment, Heritage & Local Government

## National House Commencements

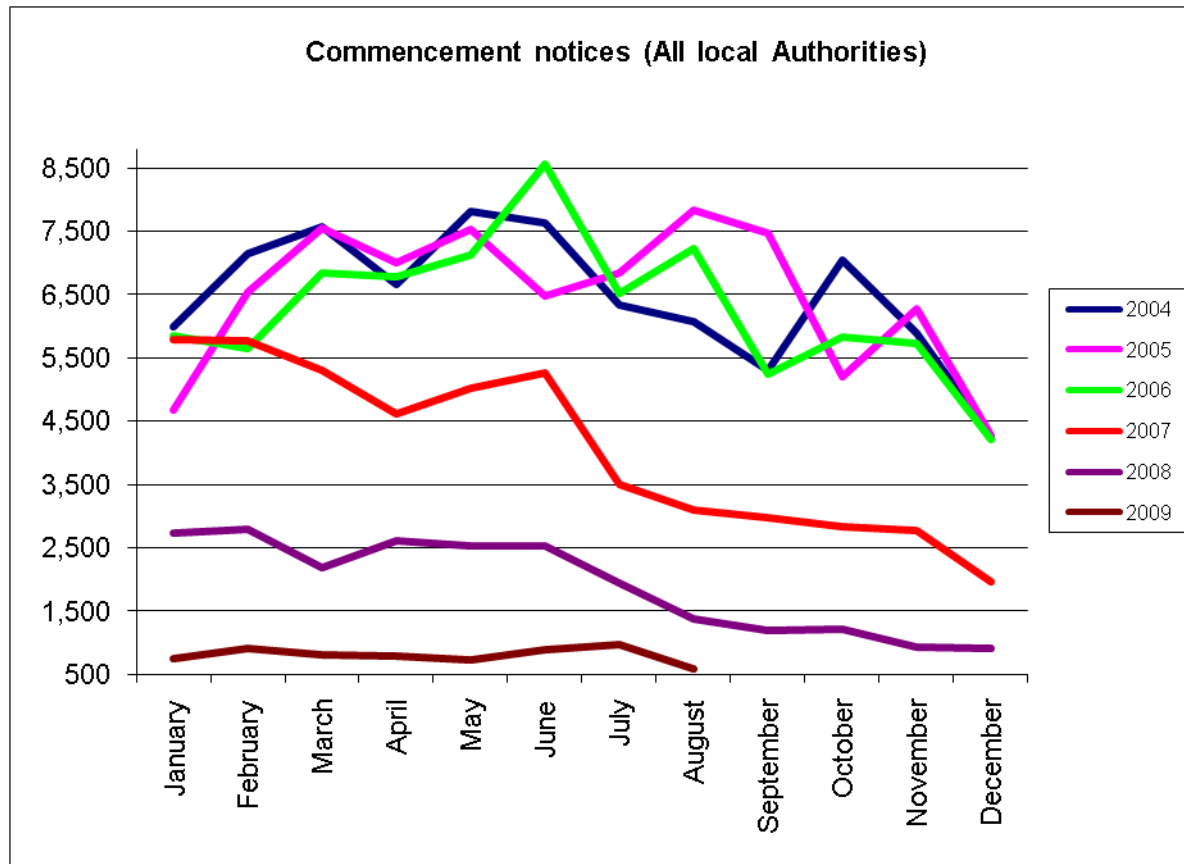
### Total number of residential units commenced (26 counties)

#### Cumulative

	January	February	March	April	May	June	July	August	September	October	November	December
2004	5,984	7,148	14,718	21,371	29,190	36,814	43,144	49,210	54,513	61,550	67,449	71,707
2005	4,680	11,218	18,770	25,784	33,321	39,804	46,654	54,481	61,954	67,156	73,434	77,709
	78%	157%	128%	121%	114%	108%	108%	111%	114%	109%	109%	108%
2006	5,850	11,498	18,341	25,124	32,253	40,816	47,345	54,572	59,810	65,646	71,383	75,602
	125%	102%	98%	97%	97%	103%	101%	100%	97%	98%	97%	97%
2007	5,782	11,556	16,855	21,468	26,485	31,747	35,244	38,341	41,323	44,158	46,925	48,876
	99%	101%	92%	85%	82%	78%	74%	70%	69%	67%	66%	65%
2008	2,730	5,520	7,713	10,330	12,854	15,386	17,321	18,697	19,891	21,099	22,016	22,929
	47%	48%	46%	48%	49%	48%	49%	49%	48%	48%	47%	47%
2009	752	1,655	2,461	3,239	3,970	4,855	5,817	6,396				
	28%	30%	32%	31%	31%	32%	34%	34%	0%	0%	0%	0%

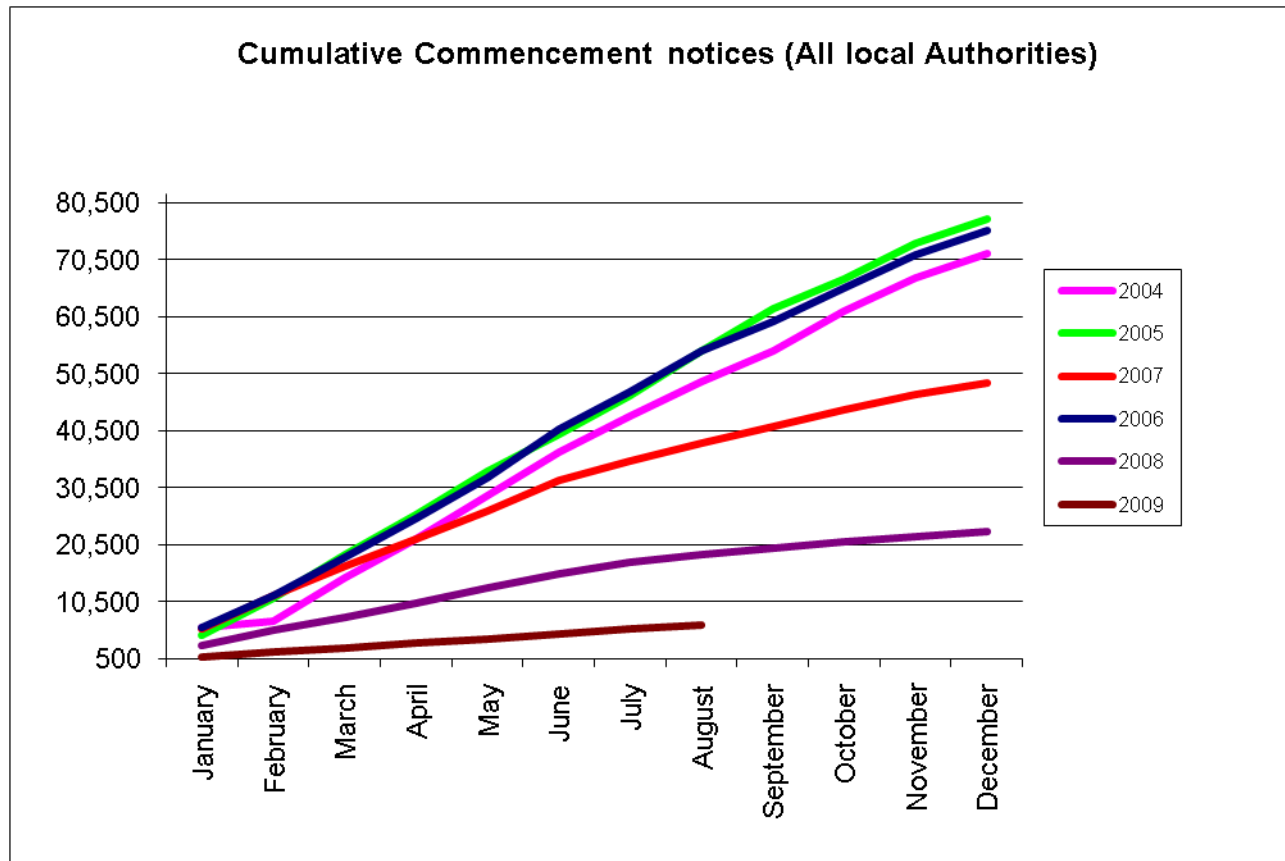
Source: Department of Environment, Heritage & Local Government

## National House Commencements



Source: Department of Environment, Heritage & Local Government

## National House Commencements



Source: Department of Environment, Heritage & Local Government

## Number of planning permissions granted by type of construction

Period	Number of permissions					Total floor area (000 sq. metres)			
	New construction		Extension	Alteration and conversion	Total	New construction		Extension	Total
	Dwelling	Other				Dwelling	Other		
<b>2007</b>									
<b>Q1</b>	5,709	4,995	4,033	651	15,388	2,952	2,272	570	5,793
<b>Q2</b>	5,636	6,229	4,751	695	17,311	3,409	2,668	643	6,719
<b>Q3</b>	5,880	5,411	5,210	837	17,338	3,165	2,748	725	6,638
<b>Q4</b>	5,028	2,767	3,841	694	12,330	2,680	1,626	529	4,835
	<b>22,253</b>	<b>19,402</b>	<b>17,835</b>	<b>2,877</b>	<b>62,367</b>	<b>12,206</b>	<b>9,314</b>	<b>2,467</b>	<b>23,985</b>
<b>2008</b>									
<b>Q1</b>	4,777	2,104	3,523	651	11,055	2,645	1,359	509	4,514
<b>Q2</b>	4,722	2,050	3,743	700	11,215	2,901	1,425	444	4,770
<b>Q3</b>	4,253	1,774	4,166	711	10,904	2,263	1,265	470	3,998
<b>Q4</b>	3,739	1,616	3,003	619	8,997	2,028	1,102	387	3,517
	<b>17,419</b>	<b>7,544</b>	<b>14,435</b>	<b>2,681</b>	<b>42,151</b>	<b>9,837</b>	<b>5,151</b>	<b>1,810</b>	<b>16,799</b>
<b>2009</b>									
<b>Q1</b>	3,275	1,231	2,499	481	7,486	2,090	870	459	3,419
<b>Q2</b>	2,689	1,158	2,405	504	6,756	1,753	872	281	2,906
<b>Q2 2009/ Q2 2008</b>	<b>57%</b>	<b>56%</b>	<b>64%</b>	<b>72%</b>	<b>60%</b>	<b>60%</b>	<b>61%</b>	<b>63%</b>	<b>61%</b>

Source: CSO

The total number of permissions granted during Q2 2009 is 60% of the number granted for the same period last year. Alterations and conversions for Q2 2009 are at 72% when compared to Q2 2008, with 504 permissions granted.



## Contact the IFFPA

***The Irish Forestry and Forest Products Association (IFFPA) was established to represent the broad forest and forest-based business sector. We are the only industry association that represents the sector as a whole and provides mechanisms for collaboration on a sector-wide basis.***

*IFFPA ensures that government and other key decision-makers recognise the importance of the industry to the environment and the economy.*

*As a membership organisation, IFFPA works to educate and communicate the vast potential benefits of forestry and forest products to a wide audience, including government, state agencies, public and consumers.*

### CONTACT US

*For further information please contact:*

**Marian Byron**

**Director, Industrial Products and Services Group**

TELEPHONE + 353 (0) 1 605 1624

EMAIL [marian.byron@ibec.ie](mailto:marian.byron@ibec.ie)

**Catherine Joyce-O'Caollai**

**Executive, Industrial Products and Services Group**

TELEPHONE + 353 (0) 1 605 1697

EMAIL [catherine.joyceocaollai@ibec.ie](mailto:catherine.joyceocaollai@ibec.ie)

**Marie Larby**

**Administrative support, Industrial Products and Services Group**

TELEPHONE + 353 (0) 1 605 1574

EMAIL [marie.larby@ibec.ie](mailto:marie.larby@ibec.ie)