

FOREST & WOOD STRATEGIC REVIEW 2013

A comprehensive analysis of the opportunities
& growth constraints of the Australian forest &
wood products industry



Forest & Wood Strategic Review 2013

9th
Edition

A comprehensive analysis of the opportunities & growth constraints of the Australian forest and wood products industry

Forest fibre resources are undergoing change. The short to medium term future of plantation forestry ownership in Australia seems settled. International investors, dominated by North American pension funds, are the big winners. At the same time, native forestry in Australia has narrowed even further and continuing decline is expected.

Woodchip export markets are variable and at times, providing contradictory signals.

Wood processors are being battered by under investment, exchange rates, sluggish housing demand and cheap, high quality imports and substitute products. Facility closures and reduced production have been significant.

Engineered wood products and wood panels continue to exhibit growth, supplied by increasing imports. Sustainability and risk considerations are high on the agenda for this sector.

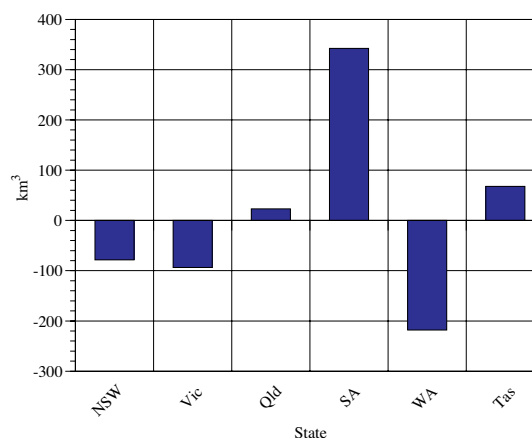
Paper and paper product markets are being impacted by global conditions. In addition, digital communications are taking their toll. Domestic production capacity has suffered, but opportunities remain.

In a period where industry insight and data are critical, the *Forest & Wood Strategic Review 2013* by *IndustryEdge*, records, analyses and reports on the changes.

Underpinned by quantitative data and analysis and confirmed by field work, the *Review's* incisive and focussed qualitative strategic analysis is comprehensive and integrated across all sectors of the Australian industry.

The *Strategic Review* gets to the fundamentals of these and other key issues, delivering insight to assist in shaping business strategy.

Drawing on the extensive experience of the *IndustryEdge* team and rigorous methodologies used across multiple sectors, the *Forest & Wood Strategic Review 2013* provides the most comprehensive and thorough analysis and commentary of the macro-political and economic factors driving the Australian industry.



New and revised content in this edition of the *review*:

- Sustainability and third party certification considerations
- Energy and other alternative wood uses
- Analysis of woodchip exports by port of departure and port of delivery
- Field researched, updated and checked engineered wood products data.

Key points from the Forest & Wood Strategic Review 2013:

- Native forest sawlog and pulp wood production continues to decline
- Hardwood plantation resources are supplying pulpwood for exports but are providing no material supply to meet domestic demand
- Privatisation of public forestry assets continue, with more expected to occur in the near future, creating opportunities for timberland investors
- Dwelling commencements, (houses and units) are slow, with some relief for the building sector from continuing renovations and extensions
- Imports across the full range of forest products are increasingly the major resource for domestic markets

The *Forest & Wood Strategic Review 2013* is the 9th in the series spanning 18 years. With data up to date to the end of 2012, only the *Forest & Wood Strategic Review 2013* delivers timely and accurate information.

For the first time, all subscribers to the *Forest & Wood Strategic Review 2013* (including those who have pre-subscribed) will receive:

- One hard copy with USB or
- One digital copy on USB
- All charts in the *Review* supplied in presentation format
- Free update of the charts to be distributed to subscribers by email in March 2014

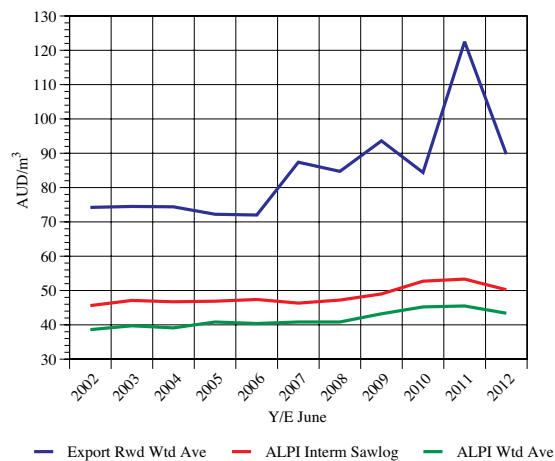
Additionally, subscribers to other *IndustryEdge* services, subscriptions and publications will receive a:

- Complimentary one month trial subscription to the monthly Australian Sawnwood and Woodchip Import and Export Data Downloads
- 10 per cent discount on new subscriptions to the monthly Australian Sawnwood and Woodchip Import and Export Data Downloads [RRP AUD1,500].

See the back cover for a subscription form. A range of packages is available.

Data and analysis compiled with industry

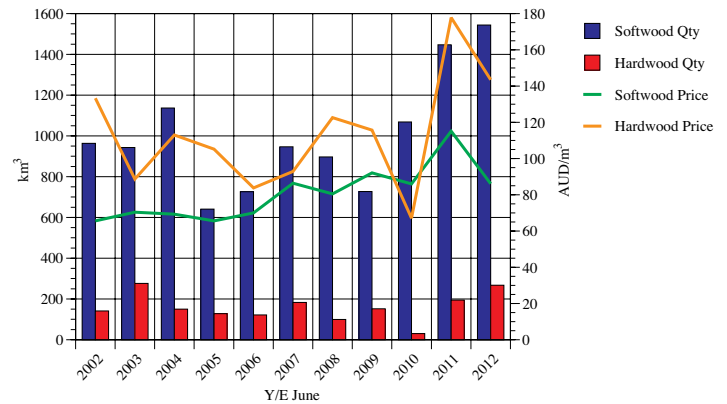
Only *IndustryEdge* goes beyond government statistics and into the field to adjust all data with current industry realities. It contains data yet to be collected by government agencies. It addresses critical issues with evidence and insight.



The IndustryEdge team

With more than sixty years of combined industry experience, the *IndustryEdge* team delivers the 9th *Forest & Wood Strategic Review 2013* as its latest contribution to the industry.

Tim Woods is Managing Director of *IndustryEdge*. Tim is principal author and publisher of this edition of the *Strategic Review*, having been a contributing author on the last two editions. He has expertise in industry policy and business strategy and has conducted and led a wide range of assignments and projects in the forestry and wood products industry over more than 20 years. Tim has practical experience in the Asia Pacific region.



Outline of the *Forest & Wood Strategic Review 2013*

The *Review* contains the following sections:

- Executive Summary
- Industry Overview
- World & Australian Forest Resources
- Roundwood Removals
- Pulpwood
- Sawnwood
- Wood Panels and Engineered Wood Products
- Pulp & Paper
- Energy & Alternative Wood Products

Each section describes apparent consumption (production, imports and exports) up to and including 2012. More than 200 tables, full colour graphs and charts and maps deliver details in an informative and easy to read format.

The *Review* features complete description of policy, regulatory and global industry and macro-economic considerations that affect the industry. A comprehensive econometric analysis of Australian domestic woodflows is provided, including forecasts.

Additional sections detail all major forest and plantation owners and wood-processing companies in Australia.

Robert Eastment is founder of *IndustryEdge* and a Director of the company. Robert is the senior contributor to the *Strategic Review*, having authored and published all 8 previous editions. A professional economist and forester, Robert has more than 30 years of experience in the Australian forestry and pulp and paper sectors. He has worked extensively with industry in commercial and corporate settings, as well as in the corporate finance sector and with governments.

Jason Corbett is a data and information specialist. With more than 15 years of experience, Jason coordinates data collection and reporting on all *IndustryEdge* assignments.

Order Form



Forest & Wood Strategic Review 2013

To order your copy simply fax the form below to +61 (0) 3 5229 0034 or email admin@industryedge.com.au

Name _____

Position _____

Company Name _____

Postal Address _____

Phone _____ Mobile _____

Email _____

Fax _____

I confirm I would like to subscribe to Forest & Wood Strategic Review 2013 as indicated on this subscription form. I also confirm it is solely for the use of my organisation, its branches and subsidiaries and will not be copied or distributed to other organisations.

I confirm I would like to receive the complimentary one month trial subscription to the Australian Sawwood and Woodchip Import and Export Data Downloads.

Pricing (All prices in AUD. GST not applicable for orders outside Australia. Please tick appropriate box.)

<input type="checkbox"/>	First time subscriber to Forest & Wood Strategic Review	\$2600 + GST
<input type="checkbox"/>	Previous Subscribers to Forest & Wood Strategic Review & other IndustryEdge Publications and Services	\$2000 + GST
PACKAGE DEALS		
<input type="checkbox"/>	Forest & Wood Strategic Review 2013 & Pulp & Paper Strategic Review 2012 (save up to \$800)	\$3400 + GST
<input type="checkbox"/>	Forest & Wood Strategic Review 2013 & Pulp & Paper Strategic Review 2012 + 12 Month Pulp & Paper Edge Subscription (save up to \$900)	\$4200 + GST
TOTAL COST		

Please send me a hard copy and an electronic copy of the Strategic Review **OR**

Please send me a soft copy only of the Strategic Review

Payment (Please tick the appropriate box)

Cheque enclosed (payable to IndustryEdge Pty Ltd)

Please invoice my company

Please charge my Visa Mastercard AMEX Diners

Card number

Expiry /

I confirm that Forest & Wood Strategic Review 2013 is for internal use of my organisation and its branches or subsidiaries, and will not be made available or copied for the benefit of other organisations:

Signed _____ Date ____ / ____ / ____

IndustryEdge Pty Ltd
PO Box 7596
Geelong West VIC 3218
Australia

Telephone: +61 (0) 3 5229 2470
Facsimile: +61 (0) 3 5229 0034
Email: tim@industryedge.com.au


IndustryEdgeTM

www.industryedge.com.au
ABN 39 109 201 630