

# Advocacy Report

2023-24



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# 1. Foreword

For most in the wood-value chain, the last year has involved a great deal of ‘treading water’. Moving forward in the current economic climate has been nigh on impossible for most companies with efforts instead directed into avoiding the negative impacts of what we hope is now the tail end of the recession.



While uncertainty is prevalent, some forecasts suggest that by Q4 2025, there could be signs of economic recovery in Europe, with new housing starts beginning to pick up. Any growth in this sector is likely to require strong support from policymakers in the EU.

For the EU, housebuilding has traditionally been a Member State issue, but the re-elected President of the European Commission, Ursula von der Leyen, has made it clear that in her second term, the EU will engage with what she and the main centre ground political groups in the Parliament have identified as a housing crisis.

*“Europe faces a housing crisis, with people of all ages and families of all sizes affected. Prices and rents are soaring. People are struggling to find affordable homes. This is why, for the first time, I will appoint a commissioner with direct responsibility for housing.”*

Her designated team member to lead on housing is the Danish Commissioner Dan Jørgensen, holding the title ‘Commissioner for Energy and Housing’. Given von der Leyen’s ongoing commitment to her personal initiative of the New European Bauhaus (NEB), it is likely that all initiatives by the EU to help deliver more homes - via either new build or renovation - will reference the NEB i.e. beautiful, affordable and sustainable. It is this push for sustainability that affords the wood value chain an opportunity to ‘push at an open door’.

The UK government’s commitment to building 1.5 million homes will drive up demand for softwood. If timber frames gain traction (currently under 20% of market share in England), this could significantly boost softwood imports from Sweden and Latvia, the UK’s main EU suppliers.

Additionally, and on an equally positive note, is the Commission’s proposal – to be voted on by the Parliament – for a new intermediate 2040 climate target that will see emissions reduced by 90 per cent in advance of the 2050 net zero target. To achieve such an ambitious target will necessitate a high level of removals, much higher than the current figure, which can only be achieved if a massive amount of carbon is stored in products – the bulk of which will be nature-based products deployed in the built environment. It will only be via maximising the use of timber in both new builds, especially via timber frames, and renovation, especially via wood fibre insulation, that the necessary level of removals can be reached in time.

Clearly, it is not only via the built environment that removals can be delivered, but 2040 is only 15 years away. To date, industrial carbon capture and storage at an affordable price and at the necessary scale remains in practice allusive. Forest expansion is a possibility in many but not all European countries and we would welcome such a development but alas it may do no more than compensate for the declining ability of Europe's existing forest cover to sequester carbon. Agriculture's ability to remove carbon while much trumpeted is questionable and, even if it does begin to deliver at scale and quantity, it is unlikely to ever offset the entirety of agriculture's overall emissions (although all removals are clearly welcome). This brings us back to the proven and immense removal potential of nature-based products such as timber in the built environment.

*"A conservative estimate, made by someone with knowledge in this field, is that we may have 1,800MtC (1.8Gt) of carbon stored in the timber products contained within the European built environment, which would be almost twice as much carbon as stored in the Swedish forest (1,000MtC (1Gt))."*<sup>1</sup>

Consequently, our ultimate aim should be to have more carbon stored in nature-based materials in our built environment than in the European forest.

My top tip for the year ahead is to watch out for the deployment of carbon offsets with a financial value – direct or indirect – in relation to carbon stored in nature-based products in the built environment. By way of example, take Folkhem in Sweden. They specialise in big timber residential builds. Their latest, the seven storey Forest Keeper's House, on the south side of Stockholm is set to deliver two world firsts. It will be the first big residential timber framed build to use a nature-based insulation, either wood fibre or hemp, a move that will in all likelihood double the total amount of carbon stored in the build. Secondly, they are working with their funding banks to access a lower level of interest on the loans they take out to facilitate the build on the basis that the apartments will be *the greenest ever big residential timber build*. While no money will change hands (it did on the carbon offsets generated by the timber framed Founders Hall at the University of Washington), the ability of the Forest Keeper's House to generate a massive amount of carbon offsetting will be financially recognised in lower interest rates offered by the banks - we hope! In turn, these lower interest rates should translate into a slight reduction in the price paid by the customers who buy the flats.

To conclude, this time next year, I believe the wood industry will be once again taking a growing share of a growing market, while simultaneously delivering a disproportionately large and growing share of the carbon reductions and removals needed by Europe.



**Sampsa AUVINEN**

Chairman of CEI-Bois

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1 P. Brannen, *Timber! How wood can help save the world from climate breakdown* (Newcastle upon Tyne: Agenda Publishing, 2024), 15.





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# 2. The European Confederation of the Woodworking Industries

## 2.1 Background and missions

Founded in 1952, CEI-Bois is the European Confederation of the Woodworking Industries. It is an international non-profit association, legally registered as an AISBL under the Belgian law.



The Confederation is based in Brussels and numbers 18 national organisations and 4 European sector federations.

The primary goal of CEI-Bois is to promote the interests of the European wood sector and to this end to contribute to the EU policy-making process. It is the main body representing the European woodworking industries at European and international level.

CEI-Bois' missions are to:

- promote the sector and the use of wood in its numerous forms and applications,
- represent and safeguard interests of the European woodworking industries,
- highlight the natural sustainability of wood and wood-based products.

The day-to-day management of CEI-Bois is performed by the secretariat in Brussels, supported by five Working Groups dealing with sustainability, social affairs, construction, innovation and trade issues.

Additional ad hoc task forces are established when needed. Currently, there are seven Task Forces on the topics of life-cycle assessment, fire, deforestation, volatile organic compound (VOC), Carbon Removals Certification, CLT Hub and TIMBIM.

## 2.2 Working groups

### 2.2.1 Construction Working Group

Timber products and a large variety of wood-based materials are increasingly being used in carbon and energy efficient construction. The overall aim of the Construction Working Group is to strengthen this position in European policies, regulatory affairs, standardisation and research & innovation. The working group works on developing initiatives in accordance with the guiding objectives described below.



### **Building with wood**

- Advocacy of the use of wood in construction and renovation, including prefabricated houses.
- Advocacy of the environmental and energy efficiency performance of wood in a life cycle approach framework.
- Active support for innovative wood-based materials and building concepts.

The European CLT Hub was initiated at a meeting on 1 April 2019 in Vienna and unanimously supported in order to streamline the information and cooperate as well as interact on a European level.

In 2020, the hub was started by a group of company experts to define the common approach and the issues that should/could be tackled.

In July 2021, it was decided and requested to open up the hub to further interested companies and associations in order to broaden it. Interested companies and associations are requested to contact CEI-Bois.

### **Indoor air quality**

- Wood-based products as an attractive and healthy choice for indoor use.
- Avoidance of restrictive emission limits for wood-based construction materials.

### **Volatile Organic Compounds Task Force**

Since July 2022, the Task Force on Volatile Organic Compounds (VOC) has been active within the CEI-Bois Construction Working Group. The VOC Task Force seeks to discuss issues related to emissions to indoor air and to coordinate on potential advocacy activities. The task force is open to all CEI-Bois members, who are invited to contact the Secretariat if interested in taking part in the upcoming meetings.

### **TIMBIM TASK FORCE**

The TIMBIM project aims at helping manufacturers to digitise their data and make them available in a machine-readable and standardised format. TIMBIM creates a common data dictionary and common data templates that are based on relevant harmonised product and test standards and applied across all European countries.

*“Product information is essential for smooth processes throughout all planning stages. Products are the variables in the gigantic interrelated systems that we call buildings. Products make up the different components, which in turn comprise the building. If as an industry, we want to transform digitally, we need to start with the smallest elements of the system. We need to digitise product information in a way that allows algorithms to recognise and access those variables. We should also be able to provide and exchange this information across the entire industry. This is a prerequisite for the adoption of new digital technologies, processes and business models within the sector.”*

*Dr Hansueli Schmid, Chair of the TIMBIM Task Force.*

### **CEI-Bois was recognised as a role model for Digitisation**

From 12-15 March 2024, the buildingSMART International Summit took place in Valencia and brought together industry professionals dedicated to ensuring that open standards contribute to a more sustainable built environment.

On this occasion, CEI-Bois was recognised as a role model for Digitisation. Indeed, CEI-Bois' TIMBIM initiative was presented to the participants and held up as an example.

- Frédéric Grand from Cobuilder presented the use of the open data dictionaries of CEI-Bois to create templates for the European digital product passport (DPP). The topic is embedded in the Product domain of building smart International as well as in the buildingSMART sustainability strategic group.
- Espen Schulze explained how the EU-policies match with the ISO/IEC and EN Standards for data dictionaries.

In 2021, CEI-Bois initiated a pilot project together with Cobuilder to help manufacturers digitise their data and make it available in a machine-readable and standardised format. As part of this pilot project, the CEI-Bois TIMBIM initiative has created a common data dictionary and common data templates that are based on relevant harmonised product and test standards, which now are applied across all European countries in order to provide and demand data of construction products in wood.

Since 2023, this content is also published on the international Data dictionary bsDD of buildingSMART international. Based on this template, Lignumdata has created a richly illustrated database of over 4000 wood species and thus offers an insight into the great variety of ligneous plants.

More specifically, the Construction Working Group is involved in crucial dossiers discussed at the EU level, including the recast of the Energy Performance of Buildings Directive, the revision of the Construction Products Regulation, the amendment of Decision 2006/213/EC on Reaction-to-fire Performance for Wood Panelling and Cladding, the EU Roadmap for the Reduction of Whole Life Carbon of Buildings, the revision and update of the EU Guidance on Construction and Demolition Waste Management Protocol, the EU End-of-Waste Criteria of Construction and Demolition Waste, the Taxonomy for Sustainable Activities (construction focus), etc.

CEI-Bois and its Construction Working Group are also actively represented by the Secretariat in European Commission-led construction policy platforms, such as the High-Level Construction Forum, and is working closely with other influential European stakeholders such as Construction Products Europe.

## **2.2.2 Sustainability Working Group**

The main aim of the Sustainability Working Group is to promote the inherent advantages of using wood. Wood is renewable, sustainable, and can be used, re-used and re-cycled. It is a model product for Europe's transition towards a green, circular biobased economy intended to boost global competitiveness, foster sustainable economic growth, and generate new jobs.

The woodworking industries are committed to sourcing wood from sustainably managed forests and to complying with the EU timber regulation (EUTR) and the EU deforestation-free products regulation (EUDR). They are also helping tackle climate change by storing carbon in harvested wood products and substituting other fossil-intensive materials. Not only is the production and processing of wood highly energy-efficient - giving wood products an ultra-low carbon footprint, but wood can often be used to substitute for materials which require large amounts of energy to be produced and which suffer from higher carbon intensity.

For the monitoring of the LCA and standardisation-related issues, a dedicated LCA Task Force is in place within the Sustainability Working Group. The LCA Task Force provides the proper orientations to ensure the woodworking industries are duly represented within the competent standardisation committees.

In October 2023, CEI-Bois established together with the European Organisation of the Sawmill Industry (EOS) a Joint EUDR Task Force as part of the wider Sustainability Working Group. Meeting on ad-hoc basis, the CEI-Bois and EOS Joint EUDR Task Force enables the sharing of relevant updates and encourages open discussions in view of supporting and facilitating the implementation of the EUDR. The joint task force is open to all the CEI-Bois members, who are invited to contact the secretariat if interested in taking part in the upcoming meetings.

Furthermore, since the beginning of 2023, CEI-Bois has been an active member of the European Commission-led Expert Group on carbon removals. To enable members to support CEI-Bois' mandate in this expert group, a Joint Carbon Removals Certification Task

Force was set up in January 2023 together with EOS as part of the wider Sustainability Working Group. This joint task force is also meeting on an ad-hoc basis, as demanded by developments pertaining to the workings of Expert Group on carbon removals. The joint task force is open to all CEI-Bois members, who are invited to contact the secretariat if interested in taking part in the upcoming meetings.

The Sustainability Working Group is specifically involved in crucial dossiers discussed at the EU level, among which the EUDR, the Carbon Removals Certification Framework, the Packaging and Packaging Waste Regulation, the EU Biotechnology and Biomanufacturing Initiative, the Ecodesign for Sustainable Products Regulation, the Green Claims Directive, the Directive on Corporate Sustainability Due Diligence, the renewal of the IPBC approval, etc.

CEI-Bois and its Sustainability Working Group are also actively represented by the secretariat in European Commission-led expert groups, such as the Multi-stakeholder platform on protecting and restoring the world's forests with a focus on deforestation and forest degradation, the Expert Group on forest and forestry stakeholder platform, the Expert Group on forest-based industries and sectorally related issues, and the Expert Group on carbon removals, and is working closely with other influential European stakeholders in the wider forest-based sector and beyond.

### **2.2.3 Social Affairs Working Group**

Within all companies, maintaining and improving the quality of the relations between employers and workers is a sine qua non condition to guarantee the company growth. Both actors target the common objective of a sound company development.

More largely but similarly, at European level, the Social Dialogue represents the way to improve the European governance through the involvement of the social partners in decision-making and in the implementation process.

The EU Wood Sector Social Dialogue brings together the wood industry workers and employers from the EU member States, respectively represented by the European Federation of Building & Woodworkers (EFBWW) and CEI-Bois.

Recently, the Sector Trade Unions, The European Furniture Industries Confederation (EFIC) and CEI-Bois decided to organise common meetings under a Joint Sector Social Dialogue framework for debating common issues and addressing the EU Institutions common messages.

The CEI-Bois Social Affairs WG aims to:

- identify common areas of cooperation with the trade unions,
- promote and manage investigation and communication projects,
- contribute to the definition of the European Sector Social Dialogue Agenda,
- monitor relevant industrial relations-related issues.

In 2023, the Social Affairs Working Group met on three occasions and discussed a.o. the following topics: national collective bargaining updates, the Bioeconomy initiative, the European Year of Skills, the Resilientwood project, the Val Duchesse “Action plan to tackle labour and skills shortages”, the Declaration of La Hulpe, EC proposals on the quality of traineeships in the EU, the EC consultation on fair telework and the right to disconnect, etc.

#### **2.2.4 Trade Working Group**

The main aim of the Trade Working Group is to ensure a level-playing field for the woodworking industries, both for their wood raw material procurement and their sales of semi-finished and finished wood-based products. This means promoting the “FREE AND FAIR” trade principle.

Furthermore, both on the internal and the external EU market, the working group intends to maintain and improve standards, while lowering operating costs and increasing efficiency.

Besides addressing any emerging trade issue, including non-tariff barriers, this working group also tries to define a long-term trade strategy for CEI-Bois.

#### **2.2.5 Research, Development and Innovation Working Group**

The Research, Development, and Innovation Working Group contributes to strengthening the wood industry’s position in public funding programmes for innovation research at European, transnational, and national/regional level.

It aims at defining the strategic research questions for the wood industry as an integral part of the forest-based, circular bioeconomy and collecting proposals to make them tangible.

Connection with all the relevant partner organisations and with the Forest-based Technology Platform (FTP) is essential.

The CEI-Bois members and network are engaged and integrated into the activities of the RDI Working Group, which is communicating clearly about research for innovation and interacting with the competent EU interlocutors.

#### **2.2.6 Role and election rules of CEI-Bois Working Group Chairs**

During its meeting of 5 September 2024, the CEI-Bois General Assembly adopted the “*Chairperson of a CEI-Bois Working Group. Role and election rules*” document, which covers the functioning of CEI-Bois working groups, as well as of the CEI-Bois Task Forces that can be created in the framework of a dedicated working group.

The document was prepared on express request of the CEI-Bois Board and aims at providing clarity about the selection process of the Chairperson of a CEI-Bois Working Group.



In a nutshell, the key elements of the document are:

- The Chair of a working group is appointed by the CEI-Bois Board, on consensus. The General Assembly is simply informed about this decision. The working group itself will consider specific perspectives required for the working group and their work, which will be forwarded to the CEI-Bois Board Members.
- Each member of CEI-Bois has the right to propose a candidate as Chair of a working group.
- Each working group shall have a Chair proposed by different CEI-Bois national or European member. Companies' expert can be nominated by its affiliated CEI-Bois national/ European member. Companies without a national affiliation shall be proposed by any CEI-Bois national/ European member.
- The Chair is elected for a mandate of three years and can be re-elected, although a rotation approach should always be the preferred option.
- The first election of the Chairs according to the "Chairperson of a CEI-Bois Working Groups. Role and elections rules" is taking place in June 2025, during the CEI-Bois board meeting.

## 2.2.7 Other working groups and platforms

Currently CEI-Bois is a member of the following official working groups/platforms run by the EU Commission:

- Expert group on carbon removals,
- Expert group/Multi-stakeholder platform on deforestation and forest degradation,
- Expert group/Multi-stakeholder platform on protecting and restoring the world's forests, including the EU timber regulation and the FLEGT regulation,
- Expert Group on forest-based industries and sectorally related issues,
- Sectoral social dialogue committee,
- Expert group on forest and forestry stakeholder platform.

On a broader level, CEI-Bois is also a member of:

- UNECE FAO,
- ACFI (FAO) steering committee,
- Forest Europe.

## 2.3 Communications

### 2.3.1 Circular letters

CEI-Bois is continuously keeping its members informed about recent policy developments, consultations and initiatives, reports and studies, positions, events and other matters. It also seeks members' views and technical opinions on specific issues.

This internal communication is carried out by means of circular letters sent to the members concerned. Over the course of one year, the CEI-Bois Secretariat generally addresses between 150 and 200 circular letters to its members.

### 2.3.2 Advocacy focus

In addition, every two months, CEI-Bois publishes a newsletter which aims at providing an update on some selective EU ongoing topics that are of primary interests for the woodworking industries. In order to have a comprehensive overview of the different issues, members are invited to read the correlated circular letters containing detailed information.

### 2.3.3 Website

The main visitor statistics between 15 October 2023 and 15 October 2024 are:

- Number of sessions: 7,006
- Unique visitors: 4,426
- Pages viewed: 12,611
- Pages viewed/session: 1.8
- Average length of visit: 3'24"

### 2.3.4 Social media

CEI-Bois is mainly active on its new LinkedIn company page, which was launched in March 2024, where it publishes posts aimed at increasing the awareness about our organisation, our members, our sector, and all the benefits of using wood in the context of decarbonisation and climate neutrality by 2050.

Our LinkedIn page also serves to share and give greater visibility to our members' actions and events. Members are therefore encouraged to inform the Secretariat of any events, activities or news they would like the CEI-Bois secretariat to publish or share.

The key indicators between 11 March and 15 October 2024 are:

- Followers: 1,384
- Posts: 182
- Impressions: 84,129
- Clicks: 5,436
- Reactions: 2,198

### 2.3.5 Press releases, position papers, statements and publications

Over the past year, CEI-Bois has also regularly communicated through press releases, (joint) position papers and statements as well as publications. These included:

- **Press release** (23 November 2023): CEI-Bois presents its 2023 Advocacy report and outlines its new activities for 2024.
- **Joint statement** (8 December 2023): Open support letter for NEB: The EU forest-based sector's role in the transformation of the built and living environment.
- **Publication** (5 December 2023): CEI-Bois Advocacy Report 2023.
- **Position paper** (15 January 2024): Sea crisis escalation jeopardises trade with Asia and Africa.

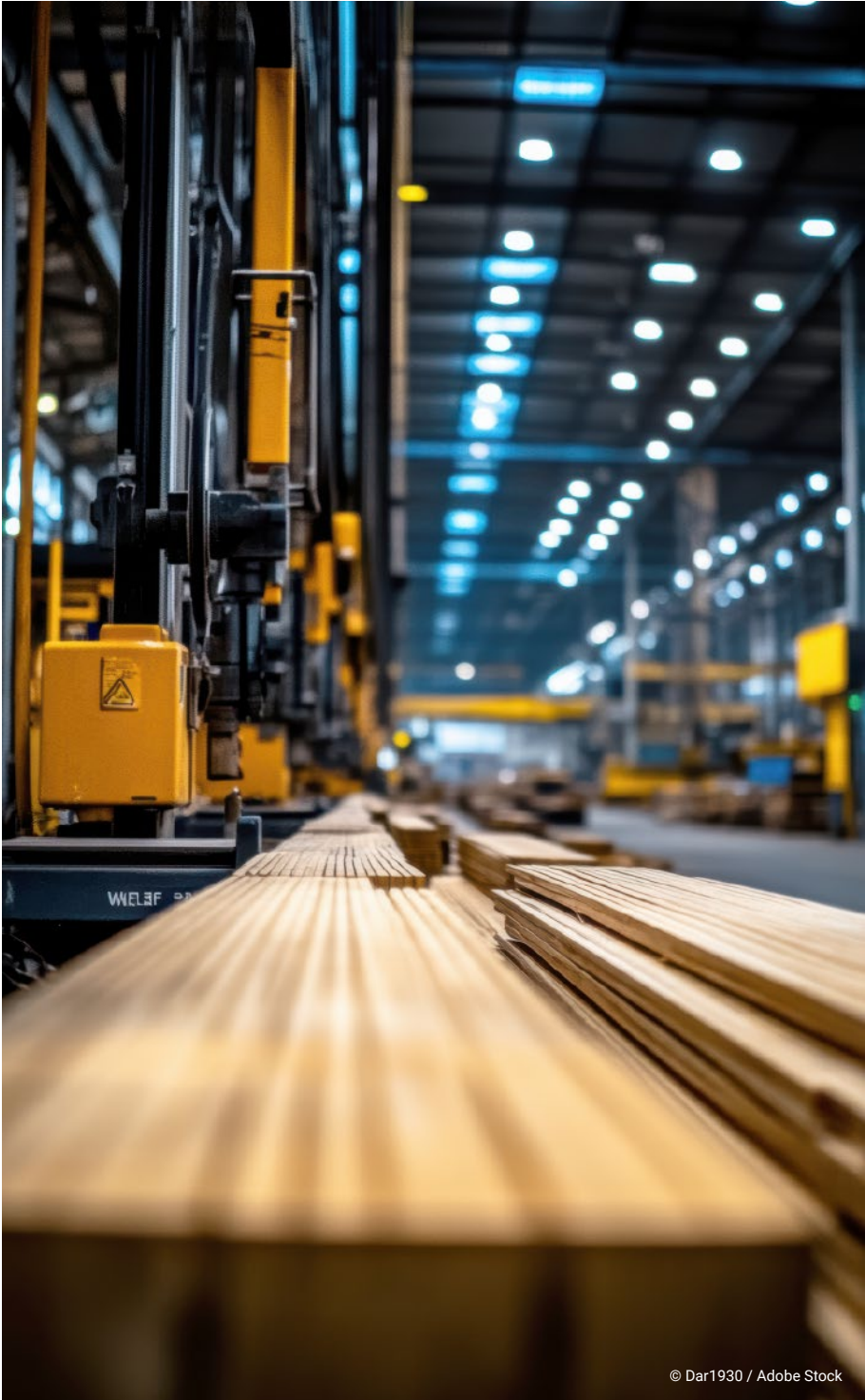


- **Press release** (6 February 2024): Response from the European wood industries to the 'Securing Our Future' communication from the European Commission.
- **Press release** (20 February 2024): CEI-Bois and EOS welcome the outcome of the triologue discussions on the Carbon Removals Certification Framework.
- **Position paper** (12 March 2024): Possible Japanese Imports Ban on Russian Wood Products.
- **Position paper** (12 March 2024): The European Woodworking Industries express great concern about EUDR.
- **Publication** (13 March 2024): Biomanufacturing, the circular bioeconomy and the European woodworking and sawmill industries.
- **Joint statement** (28 March 2024): Joint cross-commodity call to EU Commission and Member States to provide urgent clarifications and workable solutions for EUDR implementation.
- **Publication** (29 March 2024): Year of Skills - An impetus for high quality training, up to date curricula, an improved attractiveness of the woodworking and furniture sectors and a more ambitious Erasmus+ for apprentice.
- **Press release** (22 May 2024): The European woodworking and sawmill industries release their political manifesto for the 2024-29 political term.
- **Publication** (22 May 2024): The European woodworking and sawmill industries political manifesto for the 2024-29 political term.
- **Press release** (15 June 2024): Why we need to chop down trees to save the world from climate breakdown.
- **Press release** (18 July 2024): European woodworking industry welcomes focus on housing in Ursula von der Leyen's re-election speech!
- **Press release** (4 September 2024): The Resilientwood project partners put forward recommendations for a strong European woodworking industry.
- **Joint statement** (25 September 2024): With less than 100 days left and no clear implementation tools, European primary producers and various industries urge a delay of the entry into application of the EUDR.
- **Joint statement** (30 September 2024): European forest and forest-based sector joint statement for the 9<sup>th</sup> Ministerial Conference on the Protection of Forests in Europe.
- **Joint statement** (2 October 2024): European Commission grants an additional twelve months for EUDR implementation in response to sector concerns.
- **Joint statement** (22 October 2024): Affected sectors and industries call on the European Parliament to swiftly adopt the urgent procedure for the Commission's proposal on EUDR postponement.

### 2.3.6 Publications in the press

All the above-mentioned communication activities resulted in numerous articles being shared and published in daily newspapers, trade press, websites and social media. For the year 2024, we counted close to 75 publications and references in the press. These publications provided additional visibility for our activities and those of our members.





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# 3. The European woodworking industries

## 3.1 Timber supply

The tables below are about the timber supply in Europe, respectively for softwood and hardwood. A few countries did not share data but overall, the dataset is very much representative even though the total, with some countries missing, is slightly underestimated. 2023 and 2024 are estimates. Data are in 000 m<sup>3</sup>.

Wood in the rough has the following main uses: wood used by the industry to be processed into other products (logs for production of sawnwood, pulpwood for production of wood pulp for paper production) and wood fuel used for energy purposes. The tables below show the breakdown of the uses in each European country that has shared data.

In softwood, logs predominate, with 185 million m<sup>3</sup> removed from European forests in 2022. The amount of pulpwood removed was 99 million m<sup>3</sup> while the amount of wood fuel was 39 million m<sup>3</sup>. Overall, the total industrial wood removed was about 288 million m<sup>3</sup> in 2022. So, in softwood, almost two thirds of wood in the rough removed were logs, about 34% was pulpwood, and 13% fuelwood. For 2023, estimates point to removals in the region of 277 million m<sup>3</sup>. This represents a 4% decline compared with 2022. Pulpwood removals are expected to be steady, while logs removals are expected to decline and so account for the overall decrease.

In hardwood the situation is different with logs accounting for 22 million m<sup>3</sup> removed from the European forests in 2022. Pulpwood quantity was 45 million m<sup>3</sup> and wood fuel 82 million m<sup>3</sup>. So, in hardwood, about 15% of wood in the rough removed were logs, about 30% was pulpwood, and 53% fuelwood.

### Softwood removals of wood in the rough

Country	Industrial wood									Wood fuel <sup>b</sup>			Total		
	Total			Logs			Pulpwood <sup>a</sup>			2022	2023	2024	2022	2023	2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024						
Austria	12,958	10,873	11,338	10,382	8,638	9,038	2,576	2,235	2,300	3,248	3,069	3,140	16,206	13,942	14,478
Cyprus	2	2	2	2	2	2	0	0	0	10	8	7	12	10	9
Czech Republic	19,440	14,455	13,825	14,019	10,094	9,589	5,316	4,253	4,125	3,610	3,249	3,200	23,050	17,704	17,025
Estonia	4,023	3,927	3,927	3,118	3,000	3,000	878	900	900	1,486	1,400	1,400	5,509	5,327	5,327
Finland	47,408	45,464	47,590	24,662	21,700	22,351	22,746	23,764	25,239	4,593	4,593	4,593	52,001	50,057	52,183
France	17,300	17,070	16,770	12,491	12,500	12,500	4,559	4,300	4,000	2,417	2,500	2,600	19,171	19,570	19,370
Germany	52,425	50,120	46,120	41,761	38,500	37,000	10,541	11,500	9,000	8,834	9,200	9,200	61,259	59,320	55,320
Hungary	688	759	743	175	201	208	411	488	481	383	294	333	1,071	1,053	1,076
Italy	1,797	2,502	2,502	1,169	1,169	1,169	148	853	853	1,180	1,180	1,180	2,977	3,682	3,682
Latvia	8,253	7,900	8,100	5,873	5,500	5,700	1,850	1,800	1,800	298	300	300	8,551	8,200	8,400
Luxembourg	162	143	145	124	122	115	10	6	8	17	11	12	178	154	158
Montenegro	573	553	537	372	352	349	201	198	186	66	65	63	639	618	600
Netherlands	449	440	430	173	170	165	244	240	235	457	450	450	906	890	880
Poland	31,941	32,800	33,470	15,775	16,000	16,250	15,411	15,950	16,250	3,627	3,820	3,950	35,568	36,620	37,420
Portugal	3,045	3,210	3,150	1,682	1,710	1,700	1,213	1,350	1,300	996	990	980	4,041	4,200	4,130
Serbia	279	290	301	178	184	190	66	70	73	141	146	160	420	436	461
Slovakia	3,325	3,160	3,120	2,559	2,430	2,400	748	710	700	259	260	275	3,584	3,420	3,395
Slovenia	1,966	2,586	2,386	1,687	2,150	2,000	275	430	380	191	240	220	2,157	2,826	2,606
Spain	7,435	7,889	7,889	3,420	3,629	3,629	3,754	3,984	3,984	2,243	2,380	2,380	9,678	10,269	10,269
Sweden	64,603	62,760	62,873	38,100	37,300	36,900	26,353	25,310	25,823	3,008	3,008	3,008	67,603	65,768	65,881
Switzerland	2,578	2,639	2,689	2,290	2,350	2,400	279	280	280	769	770	775	3,347	3,409	3,464
United Kingdom	7,486	7,076	7,076	5,453	5,180	5,180	1,633	1,516	1,516	1,571	1,571	1,571	9,058	8,647	8,647
<b>Total Europe</b>	<b>288,136</b>	<b>276,619</b>	<b>274,984</b>	<b>185,467</b>	<b>172,881</b>	<b>171,836</b>	<b>99,212</b>	<b>100,136</b>	<b>99,433</b>	<b>39,396</b>	<b>39,504</b>	<b>39,798</b>	<b>327,533</b>	<b>316,123</b>	<b>314,781</b>

Source: COFFI

<sup>a</sup> Pulpwood, round and split: 207,519 there from and used as: 0.433372

<sup>b</sup> Including chips and particles produced from wood in the rough and used for energy purposes

Remarks: Total is higher at times than sum of pulpwood and logs due to a residual category omitted here which includes pitprops, poles, piling, posts

A few countries including Belgium, Bulgaria, Croatia, Greece, Lithuania, Norway and Romania have not shared data thus total Europe is slightly underestimated

Source: COFFI

### Hardwood removals of wood in the rough

Country	Industrial wood									Wood fuel <sup>b</sup>			Total		
	Total			Logs			Pulpwood <sup>a</sup>			2022	2023	2024	2022	2023	2024
	2022	2023	2024	2022	2023	2024	2022	2023	2024						
Austria	977	843	887	329	266	300	647	577	587	2,176	2,046	2,094	3,153	2,889	2,981
Cyprus	0	0	0	0	0	0	0	0	0	1	1	1	1	1	1
Czech Republic	1,268	1,079	1,071	616	524	517	649	552	550	795	716	700	2,063	1,795	1,771
Estonia	2,452	2,474	2,474	1,158	1,200	1,200	1,270	1,250	1,250	2,580	2,400	2,400	5,032	4,874	4,874
Finland	8,838	7,933	7,845	1,037	1,049	1,061	7,801	6,884	6,784	4,747	4,747	4,747	13,585	12,680	12,592
France	8,348	8,200	8,300	4,707	4,700	4,800	3,332	3,200	3,200	21,756	22,000	23,000	30,104	30,200	31,300
Germany	4,110	3,810	3,510	2,995	2,700	2,500	1,103	1,100	1,000	13,504	13,500	13,500	17,613	17,310	17,010
Hungary	2,213	2,122	2,138	1,234	1,173	1,191	502	507	526	3,244	2,990	3,064	5,456	5,112	5,202
Italy	1,041	1,038	1,038	721	721	721	168	166	166	9,659	9,659	9,659	10,700	10,697	10,697
Latvia	4,238	4,250	4,250	1,730	1,750	1,750	2,018	2,000	2,000	2,638	2,700	2,700	6,876	6,950	6,950
Luxembourg	69	54	47	23	22	18	46	32	30	23	34	30	92	89	78
Montenegro	178	144	141	143	140	138	0	0	0	128	128	127	306	272	268
Netherlands	165	159	159	48	50	50	108	100	100	1,925	1,930	1,935	2,090	2,089	2,094
Poland	6,794	7,080	7,380	2,757	2,800	2,900	3,939	4,150	4,300	3,331	3,600	3,800	10,125	10,680	11,180
Portugal	9,190	9,120	9,040	356	330	360	8,586	8,500	8,400	1,387	1,390	1,320	10,578	10,510	10,360
Serbia	1,199	1,230	1,260	899	920	940	199	205	210	6,433	6,500	6,600	7,632	7,730	7,860
Slovakia	3,502	3,660	3,760	1,570	1,650	1,700	1,924	2,000	2,050	350	350	375	3,851	4,010	4,135
Slovenia	962	1,166	1,096	497	630	600	424	490	450	957	1,050	1,050	1,919	2,216	2,146
Spain	6,931	7,354	7,354	730	775	775	6,059	6,429	6,429	1,312	1,392	1,392	8,243	8,746	8,746
Sweden	6,562	6,316	6,437	180	180	180	6,232	5,986	6,107	3,000	3,008	3,008	9,562	9,324	9,445
Switzerland	433	443	453	265	275	280	165	165	170	1,169	1,230	1,250	1,602	1,673	1,703
United Kingdom	118	117	117	56	56	56	13	13	13	613	613	613	730	730	730
<b>Total Europe</b>	<b>69,587</b>	<b>68,593</b>	<b>68,759</b>	<b>22,052</b>	<b>21,910</b>	<b>22,036</b>	<b>45,185</b>	<b>44,305</b>	<b>44,322</b>	<b>81,728</b>	<b>81,984</b>	<b>83,365</b>	<b>151,314</b>	<b>150,576</b>	<b>152,124</b>

Source: COFFI

<sup>a</sup> Pulpwood, round and split, as well as chips and particles produced directly there from and used as pulpwood

<sup>b</sup> Including chips and particles produced from wood in the rough and used for energy purposes

Remarks: Total is higher at times than sum of pulpwood and logs due to a residual category omitted here which includes pitprops, poles, piling, posts

A few countries including Belgium, Bulgaria, Croatia, Greece, Lithuania, Norway and Romania have not shared data thus total Europe is slightly underestimated

Source: COFFI



## 3.2 Overview of timber balance across the world

The table below is about the production of industrial roundwood – logs, pulp and a minor residual category – at global level. We present the top 20 largest producers, importers and exporters of industrial roundwood ranked by removals.

**World largest producers, exporters and importers of industrial roundwood, 2022, m<sup>3</sup>**

Removals		Exports		Imports	
United States of America	382,543,695	New Zealand	20,181,527	China	43,601,673
Russian Federation	182,082,000	Germany	9,849,257	Austria	8,518,909
Brazil	170,681,000	Czechia	9,046,411	Sweden	6,506,467
China	165,881,000	United States of America	7,420,230	Belgium	6,135,503
Canada	143,811,047	Norway	4,269,048	Germany	5,576,296
Indonesia	88,575,723	France	4,179,860	India	4,973,993
Sweden	71,200,000	Canada	3,750,452	Canada	3,170,026
Germany	56,534,325	Poland	3,681,616	Portugal	3,130,930
Finland	56,251,261	Latvia	3,601,731	Poland	3,089,137
India	49,517,000	Belgium	3,342,436	Italy	3,068,810
Viet Nam	45,335,420	Russian Federation	3,075,000	Finland	2,879,350
Chile	40,551,000	Papua Guinea New	2,636,276	Slovakia	2,757,945
Poland	38,235,000	Brazil	2,395,633	Republic of Korea	2,748,391
New Zealand	37,146,000	Spain	2,265,333	Japan	2,526,917
Türkiye	29,881,000	Sweden	2,195,956	Viet Nam	2,439,315
France	26,188,525	Uruguay	1,888,312	Romania	2,129,546
Australia	25,983,000	Slovakia	1,863,224	Latvia	1,849,948
Japan	23,944,000	Finland	1,702,772	Czechia	1,369,113
Czechia	20,705,000	Estonia	1,651,632	France	1,176,619
Belarus	16,992,190	Solomon Islands	1,627,902	Spain	1,026,354

Source: UNECE/FAO 2024 and EOS re-elaboration

### 3.3 Development of sawn softwood production and consumption

Sawn softwood accounts for over 90% of sawnwood produced in Europe. The tables below, which was presented at the International Softwood Conference 2024, show the current situation in terms of production and consumption.

Development of Softwood production (1000 m<sup>3</sup>) - by country

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
AT	8.605	9.250	9.650	10.200	10.343	10.339	10.582	10.100	9.125	9.581	9.700
BE	1.500	1.400	1.350	1.450	1.450	1.480	1.500	1.450	1.350	1.270	1.300
CH	1.060	1.074	1.037	1.078	1.077	1.114	1.196	1.195	1.150	1.127	1.161
DE	20.434	21.109	22.050	22.780	23.505	25.216	25.313	24.308	22.844	22.250	22.700
DK	352	310	360	324	331	360	400	375	233	240	250
ES	2.062	1.821	2.375	2.496	2.536	2.391	2.875	1.818	2.523	2.573	2.603
FI	10.600	11.400	11.700	11.800	11.354	10.800	11.800	11.200	10.400	10.000	11.000
FR	6.223	6.400	6.596	6.795	6.559	6.400	7.000	7.000	6.700	6.400	6.500
IT	920	950	970	950	900	900	950	950	855	855	855
LV	2.690	2.792	2.882	2.730	2.680	2.600	2.700	2.847	2.569	2.700	2.700
NL	128	128	110	82	80	76	110	115	113	113	113
NO	2.444	2.533	2.655	2.675	2.650	2.680	2.811	2.705	2.490	2.500	2.400
PL	4.315	4.356	4.418	4.500	4.443	4.200	4.250	4.144	4.150	4.130	4.150
RO	3.600	4.340	3.600	3.550	3.500	3.000	3.500	2.400	2.800	2.700	2.800
SE	18.100	18.010	18.308	18.300	18.600	18.400	18.050	18.600	17.600	17.100	17.600
UK	3.448	3.624	3.718	3.718	3.617	3.408	3.574	3.221	2.860	2.860	2.860
EUROPE (ISC)	86.483	89.495	91.562	93.429	93.604	93.444	97.709	92.630	88.162	86.389	88.692
USA	53.785	55.300	57.414	58.332	58.767	62.733	63.401	64.308	63.411	62.143	62.732
CAN	45.362	48.158	47.304	46.370	41.527	39.190	40.227	36.411	31.553	32.500	32.500
North America	99.147	103.458	104.718	105.701	101.284	101.923	103.627	100.718	95.004	94.643	95.232
TOTAL	185.630	192.952	198.281	199.131	194.889	195.368	201.337	193.349	183.166	181.042	183.924

\*Blue cells show that forecasts for 2025 were not available so values have been calculated by repeating the 2024 data  
\*\*Gold cells values have been calculated using FAOSTAT data

Development of Softwood consumption (1000 m<sup>3</sup>) - by country

Country	2015	2016	2017	2018	2019	2020	2021	2022	2023	2024	2025
AT	5.268	5.756	5.950	6.170	6.064	6.175	6.530	6.137	5.108	5.468	5.600
BE	2.450	2.450	2.600	2.750	2.750	2.760	3.300	2.790	1.640	1.470	1.500
CH	1.180	1.187	1.181	1.213	1.183	1.220	1.281	1.289	1.238	1.242	1.256
DE	18.483	18.729	19.285	19.597	19.416	20.629	20.104	17.294	16.059	15.650	15.500
DK	2.021	1.538	1.520	1.288	1.281	1.520	1.583	1.278	1.113	1.122	1.180
ES	2.788	2.597	3.131	3.270	3.318	3.038	3.537	2.855	3.314	3.368	3.430
FI	3.100	3.200	2.800	3.000	2.508	2.700	3.000	2.300	1.900	1.800	2.000
FR	7.563	7.730	7.917	8.345	8.454	8.118	9.245	9.040	8.200	7.500	7.950
IT	4.842	4.801	4.972	4.718	4.010	3.714	4.230	5.454	4.614	4.456	4.456
LV	820	832	850	836	839	762	1.039	780	600	500	500
NL	2.118	2.210	2.297	2.397	2.238	2.447	2.750	2.259	2.264	2.273	2.343
NO	2.864	2.824	2.986	2.932	2.820	2.864	3.182	2.879	2.328	2.320	2.200
PL	4.339	4.269	4.488	4.560	4.703	4.350	4.350	4.166	4.225	4.265	4.365
RO	1.018	2.842	2.450	2.800	2.800	2.100	2.000	1.200	1.900	1.700	1.700
SE	5.450	5.500	5.780	5.705	5.500	5.300	5.800	4.900	4.410	3.900	4.600
UK	9.170	8.677	10.279	9.994	9.608	9.703	10.994	8.736	8.462	8.312	8.812
EUROPE (ISC)	73.280	76.062	78.587	79.705	77.569	77.418	82.935	73.167	67.375	65.365	67.193
USA	74.088	79.586	80.389	82.117	82.214	86.812	88.142	80.282	87.577	85.862	87.443
CAN	15.289	14.719	15.353	16.074	13.193	12.615	13.991	12.548	10.580	12.044	12.044
North America	99.987	94.305	95.742	98.181	95.407	99.226	102.133	102.830	98.158	97.906	99.486
TOTAL	183.267	170.367	174.328	177.896	172.976	176.648	185.068	176.997	165.533	163.270	166.679

\*Blue cells show that forecasts for 2025 were not available so values have been calculated by repeating the 2024 data  
\*\*Data in the cells highlighted in yellow was unavailable and has been computed by combining production and trade figures

After peaking in 2021, softwood production has significantly fallen over the last few years to adjust to the demand decline. If forecasts for 2024 are confirmed, at the end of the year production will be 12% lower than in 2021. Next year production is expected to grow by 2-3%.

Production in the sector has been curtailed to accommodate weak demand. Sawn softwood prices have sharply declined from the peaks observed during 2021 and 2022. This is mainly due to the downfall of the construction sector. However, there might be light at the end of the tunnel. As it was reported by numerous speakers at the Conference interest rates have started falling across the world, which might trigger an upturn in the construction sector, which would be vital for sawmillers and traders alike. If the market does have already bottomed out, the recovery is expected to be sluggish at least in the short-term.

European and North American presenters alike stressed that costs have shot up remarkably over the last few years. While inflation is now cooling down, the new, higher cost structure remains, which is a further reason why boosting efficiency for the industry is even more important.

### 3.4 Wood-based industries sector figures

The EU's wood-based industries cover a range of downstream activities, including wood-working industries, large parts of the furniture industry, pulp and paper manufacturing and converting industries and the printing industry. Together, some 410,000 enterprises were active in wood-based industries across the EU in 2022; they represented one in five (19%) manufacturing enterprises across the EU, highlighting that – with the exception of pulp and paper manufacturing that is characterised by economies of scale – many wood-based industries had a relatively high number of small or medium-sized enterprises. The wood industries only accounted for some 7% of manufacturing enterprises across the EU.

The economic importance of an industry can be measured by the share of its value added in the economy. In 2022, the value of wood-based industries (without the furniture industry) in the EU was €139 billion or 5.7% of the total manufacturing industry. Woodworking industries *stricto sensu* accounted for over 2% of the value added.

Wood-based industries employed around 3.05 million people across the EU in 2022 or 10.2 % of the manufacturing total. There were more than 900 000 people employed within both the manufacture of wood and wood products and the manufacture of furniture. The woodworking industries *stricto sensu* accounted for over 3% of people employed in the manufacturing sector in the EU.

Main economic indicators for wood-based industries, EU, 2022

Sector/Indicator	Enterprises	Persons employed	Value added - million €	Net turnover - million €
Manufacturing total Europe	2,152,042	30,007,527	2,419,775	9,785,619
Manufacture of wood and of products of wood and cork	161,583	950,000	55,000	200,000
Manufacture of paper and paper products	18,523	630,000	60,200	256,000
Printing and service activities related to printing	100,000	520,661	23,825	67,209
Manufacture of furniture	130,000	950,000	n.a.	120,000

Source: Eurostat



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4

# 4. Overview of CEI-Bois' main advocacy actions

## 4.1 European elections

### 4.1.1 Manifesto

Ahead of the 2024 European Parliament political elections, CEI-Bois produced a joint 'Manifesto of the European woodworking and sawmill industries for the 2024-29 political term'. It is a relatively short document, written in an accessible style, containing several photographs of wood products. It is aimed primarily at politicians, their staff and decision-makers within the European Commission.

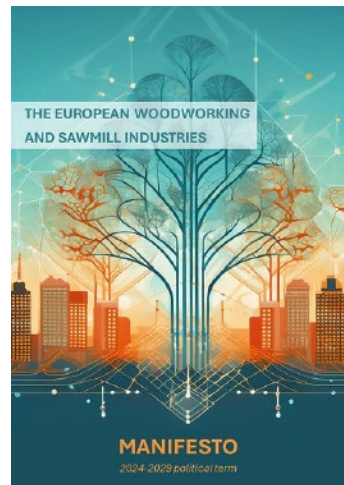
CEI-Bois Public Affairs Director, Paul Brannen, attended the EP Plenary Session which took place on 16-19 July in Strasbourg. This provided him with the opportunity to talk to a wide cross section of MEPs and their staff about the priorities of the wood working industries. Conversations were also held with key staff members who work for the political groups across the spectrum and with Commission staff who were in Strasbourg.

#### What is the Manifesto is about?

The Manifesto begins by setting out the multiple benefits of wooden products, before making the case for a strong wood products manufacturing sector in Europe. Such a sector is essential to achieving key EU open strategic priorities including environmental goals, fostering innovation, enhancing competitiveness, creating jobs, maintaining recreational/tourist spaces and responding to evolving consumer preferences.

The manifesto then points out that the European wood industries contribute to a more sustainable and resilient economy that aligns with the principles of environmental stewardship and responsible business practices. It stresses that the wood sector proudly works with one of the few renewable sustainable raw materials which is abundant in Europe, thereby contributing to reinforcing European open strategic autonomy and security of supply amid an increasingly volatile geopolitical environment.

The manifesto goes on to specifically ask policy makers to prioritise the following eight headline actions (the manifesto itself went into greater detail) in order to achieve a green, cost-efficient, competitive and resilient EU economy:



1. Undertake a science-based impact climate and environmental assessment prior to developing any new legislation that directly, indirectly or potentially effects the availability of wood resources from the forest.
2. Strengthen, not weaken, the competitiveness of the European wood products manufacturing sector including traditional sectors, crafts and SMEs by promoting investment in Europe.
3. Promote a high ambition for European open strategic autonomy for renewable raw materials and their processing for strategic applications hence the importance of complimenting primary production by boosting the availability of secondary materials in Europe.
4. Design policies and regulations to ensure that all buildings – irrespective of what they are made from – are responsible for generating as little CO<sub>2</sub> as possible during their construction and life span, and that the storage of carbon in buildings is recognised as a climate benefit. New buildings that would generate high levels of CO<sub>2</sub> emissions during their construction and/or usage should be denied planning permission. This will involve encouraging the market adoption of low carbon materials by guiding efforts, in line with a WLC approach, to reduce embodied carbon i.e. the combined emissions from manufacturing, transportation, construction and renovation.
5. Ensure coherence across policy areas covering the environment and climate, energy, construction, waste management, digitalisation as well as education and skills improvement.
6. Recognise that, while pursuing the renovation agenda, there is still a need to support the important role played by the construction sector in dealing with the increasing need for affordable and sustainable newly built assets.
7. Enable the European Bioeconomy to step up its efforts in contributing to achieving a resilient and competitive net-zero European economy including decarbonising the built environment.
8. Harmonise building codes - with regards to the use of timber in construction - to make building with wood easier across multiple geographies at both a country and a European level.

Mindful that many reading the manifesto may be new to the issues that it addresses, there followed seven key facts (each had additional details) that we felt readers needed to be aware of:

- European wood is a renewable resource.
- European wood can sequester and store carbon.
- European wood production has low energy needs.
- European wood can be recycled and reused in a circular manner.
- European wood products have low embodied emissions.
- European wood is versatile with a wide range of applications.
- European wood has an aesthetic appeal.

The manifesto concludes by going into detail as to how wood can help decarbonise the built environment i.e. it can substitute for more carbon intensive products and at the same time, in many cases, also has the benefit of storing carbon for several decades in the products. The whole process can deliver key environmental benefits



including year on year more and more CO<sub>2</sub> being removed from the atmosphere and safely stored.

The Manifesto can be downloaded on the official CEI-Bois dedicated webpage: [www.cei-bois.org/manifesto](http://www.cei-bois.org/manifesto).

#### 4.1.2 Commitment from the re-elected EU Commission President

In her re-election speech of 18 July, Ursula von der Leyen mentioned a new plan for Europe's sustainable prosperity and competitiveness. *"We must focus on implementing the existing legal framework for 2030 – in the simplest, fairest and most cost-efficient way. Our full focus will be on supporting and creating the right conditions for companies to reach our common goals. This will prepare the way towards the 90% emission-reduction target for 2040 which we will propose to enshrine in our European Climate Law."*

The main challenges identified by Ursula von der Leyen as regards Europe's sustainable prosperity and competitiveness are unfair competition, higher energy prices, skills and labour shortages and difficulties in accessing the capital. Amongst the foreseen initiatives "A more circular and resilient economy", helping to create market demand for secondary materials and a single market for waste, could be of interest for the wood industries.



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In her policy guidelines for the next European Commission, she also stressed the urgency of tackling the housing crisis, proposing the first-ever European affordable housing plan and a Commissioner responsible for the policy area, as the Socialists had demanded as a condition for backing her second mandate.

On 18 July, CEI-Bois and EOS issued a press release, welcoming the focus on housing in Ursula von der Leyen's re-election speech.



18 July 2024

**EUROPEAN WOODWORKING INDUSTRY WELCOMES FOCUS ON HOUSING  
IN URSULA VON DER LEYEN'S RE-ELECTION SPEECH**

Ursula von der Leyen has been re-elected as the President of the European Commission for a second term of five years. Prior to the vote by Members of the European Parliament she delivered a wide-ranging speech setting out her priorities if she were to be re-elected.

One of the strongest parts of her speech was on housing:

*“Europe faces a housing crisis, with people of all ages and families of all sizes affected. Prices and rents are soaring. People are struggling to find affordable homes. This is why, for the first time, I will appoint a Commissioner with direct responsibility for housing. We will develop a European Affordable Housing Plan, to look at all the drivers of the crisis and to help unlock the private and public investment needed. Typically, housing is not seen as a European issue. Some might say we should not get involved. But I want this Commission to support people where it matters the most. If it matters to Europeans, it matters to Europe.”*

Observers of the wider European political agenda will notice the synergy at play here with the UK's newly elected government also intent on delivering policies that will tackle the UK's housing crisis. For instance these words from yesterday's King's speech at Westminster delivered the same message as von der Leyen's speech: *“My Ministers will get Britain building, including through planning reform, as they seek to accelerate the delivery of high quality infrastructure and housing”*.

An increase in the building of new homes across Europe will clearly be of direct benefit to the construction industry and in turn this will be a strong driver for the woodworking industry in general and for the sawmill industry in particular, given that timber products

are essential in the construction of new homes. Additionally the percentage of homes built using wood as the main structural component is rising in both the EU and the UK. Historically increasing housing starts has a strong correlation with increasing wood consumption but over the last few years European housing permits have massively shrunk, to the detriment of the timber industry, and there is no sign that this crisis will bottom out soon - unless there is government intervention.

According to the latest available data in February 2024 the combined amount of housing permits in a few mostly large European countries has declined by over 7% (Source: Timber Exchange). This slowdown has been the situation since 2022. Hence the news that the re-elected von der Leyen intends to appoint a Commissioner with responsibility for housing (and that the EU Parliament will have a special housing committee) is welcome news to the European woodworking industry who have had a difficult time in recent years and while the industry has displayed a commendable resilience the situation remains challenging.

The woodworking industry believes that the most appropriate response to this ongoing challenge is a whole-of-society focus on increasing construction. Such an approach will be good for the economy in general including for the many sectors that depend on construction to thrive and also for wider society given the massive increase in real estate prices over the last few years which have over the long-term significantly exceeded both salary and inflation increases. Clearly the procedures allowing access to building permits need to be simplified and made faster across Europe – including in the UK. In a similar vein the regulatory burdens on building need to be shrunk. Taken together these should be the first priorities of the Housing Commissioner, when appointed.

Ursula von der Leyen's full re-election speech can be found here:

[https://ec.europa.eu/commission/presscorner/detail/ov/STATEMENT\\_24\\_3871](https://ec.europa.eu/commission/presscorner/detail/ov/STATEMENT_24_3871)

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### **4.1.3 Hearings of the Commissioners-designate – suggestion for possible questions**

CEI-Bois, supported by the EOS team, drafted for its members a list of possible questions for the hearings of the Commissioners-designate. Indeed, the appropriate EP committee or committees are expected to invite the Commissioner-designate to make a statement and to answer questions.

The hearings are to be organised in such a way as to enable Commissioners-designate to disclose to the Parliament all relevant information about his/her view on specific topics. In order to be appointed, the designated Commission needs, however, the consent of Parliament. EP Committees submit written questions to the Commissioners-designate before the hearings.

The list of questions supported by background information is reported below.

### **Simplification of existing legislation**

**Background:** In his report, Mr Draghi correctly notes that excessive regulatory and administrative burden can hinder the international competitiveness of EU companies. This negatively affects sectoral productivity, for instance by increasing companies' operation costs. The woodworking industries confirm this assessment and point out that higher operation costs also reduce companies' appetite for those investments which are necessary for developing and adopting the technologies of the future. In turn, this not only negatively impacts their competitiveness it also hampers companies' ability to comply with ambitious requirements in other legislation, which can act as barrier to accessing much-needed sustainable finance.

As a remedy to this vicious circle, the woodworking industries strongly support the recommendation in the Draghi report that, at the start of each Commission mandate, a stress-testing of all existing regulation of economic activity - by sector - should be carried out, with the goal of streamlining the EU acquis. This process should include simplifying and removing overlap and inconsistency across the whole legislative chain. This approach has also been adopted by Commission President Ms Von der Leyen in her Mission Letters to all the Commissioners-designate, where she also mandates the reduction of reporting obligations by at least 25% and for SMEs by at least 35%.

### **Specific question for Mr Stephane Sejourne, Executive Vice-President-designate for Prosperity and Industrial Strategy and Commissioner-designate for Industry, SMEs and the Single Market portfolio, with a focus on the upcoming revised Construction Products Regulation**

How do you intend to fulfil the mandate of legislative simplification in the specific case of the much-anticipated adoption of the revised Construction Products Regulation? The complexity of this legislation raises serious concerns about its applicability in a sector dominated by SMEs. Most challenging are the disproportional third-party assessment and verification obligations, especially the calculation, verification and declaration of environmental sustainability. These challenges are compounded by the lack of third-party verifiers across the EU, thereby significantly increasing the risk of market bottlenecks.

### **Specific question for Mr Valdis Dombrovskis, Commissioner-designate for Implementation and Simplification and Commissioner-designate for Economy and Productivity**

Which practical measures do you intend to employ in your engagement with the College of Commissioners and the European Parliament to ensure:

- a) The reduction of the administrative and reporting burden of existing legislation, especially for SMEs, as well as the simplification of its implementation?
- b) The implementation of the better law-making principles, particularly in view of accurately assessing the cumulative economic impact of new legislation?

## **Circular Economy Act**

**Background:** According to the Mission Letter issued by the Commission President, Ms Jessika Roswall, the Commissioner-designate for Environment, Water Resilience and a Competitive Circular Economy will propose a new Circular Economy Act as part of a Clean Industrial Deal. One of the initiatives falling under this new Circular Economy Act will be the update of the Bioeconomy Strategy.

The current EU Bioeconomy Strategy (updated in 2018) properly recognises the essential role of a sustainable European bioeconomy in supporting the modernisation and the strengthening of the EU industrial base through the creation of new and greener value chains, and more cost-effective industrial processes. Moreover, it underlines the undeniable benefit of the bioeconomy in terms of achieving climate neutrality. Similarly, the Biotechnology and Biomanufacturing Initiative - which officially announced the review of the Bioeconomy Strategy for the first time, reiterates the importance of the forest sector, which provides sustainably produced, renewable and recyclable raw materials that can be used for high-value innovative products. Both strategic documents point out that sustainable wood can effectively substitute for fossil-based or non-renewable materials, particularly in the production of construction materials. The carbon-storage ability of bio-based materials – a removals capability that is urgently needed in fighting climate change - is also highlighted.

Wood industries can contribute to the circular bioeconomy by designing products for longevity, repairability, reuse, and recyclability. Wood, being a highly versatile material and renewable, is well-suited for circular economy models where waste is minimized, and the value of products and materials is retained. Wood-derived products such as cellulose-based textiles, bioplastics, and bio-packaging can help reduce reliance on non-renewable resources. This innovation can support the EU's goals of replacing fossil-based materials with renewable, bio-based alternatives.

## **Specific questions for Ms Jessika Roswall, the Commissioner-designate for Environment, Water Resilience and a Competitive Circular Economy**

1. In view of the upcoming update of the EU Bioeconomy Strategy, how do you plan to boost the EU circular bioeconomy and increase its competitiveness while avoiding additional legislations that may be translated in new administrative burdens for SMEs?
2. When working together with the Executive Vice-President for Prosperity and Industrial Strategy, how do you intend to place the EU circular and competitive bioeconomy closer to the core of what will be the EU's future industrial strategy?
3. What role do you see for the forest-based industries in a strengthened EU circular and competitive bioeconomy? How would you enhance waste management systems to ensure that post consumers wood/wood waste can easily be reintegrated into production processes, such as bioenergy, biofuels, or other biomaterials while taking into account local market specificities?
4. The use of bio-based materials in buildings is instrumental to developing sustainable cities, one of the core values of the New European Bauhaus (NEB). Given that you will oversee the further development of the NEB, how do you envisage increasing the visibility and adoption of its values and principles? How will you approach the College of Commissioners to better operationalise the NEB within actual legislation?

## Raw material supply

Background: Forest resources provide a broad variety of environmental, economic and social benefits to society and contribute significantly to overall sustainable development in Europe. The protection of forests and ensuring these benefits over the long-term is thus an essential subject of policy concern. The importance of forests is reflected in national forest legislation, and more specifically in national forest programmes, which have been developed and implemented in European countries over the last few years. According to Eurostat, forest areas in the EU are expanding. In 2021, the EU had an estimated 160 million hectares of forests (excluding other wooded land); in relative terms, this means that forests covered 39% of the EU land area while an estimated 65% of the net annual increment of wood in EU forests was removed by the logging industry in 2021 – well within sustainability limits.

Forest owners and woodworking industries share an interest in managing forests sustainably and providing wood to the woodworking industries. For forest owners, timber sales are the main source of income. At the same time, the woodworking industries obviously cannot exist without wood. And those wood products are vital to enabling the EU's green transition for both the carbon storage and emissions reduction reasons as mentioned.

## Specific questions for Christophe Hansen: Commissioner-designate for Agriculture and Food

In recent years, European legislation has increasingly focused on forests as key tools for addressing climate change, directly or indirectly impacting the timber supply chain's access to raw materials. The EU's environmental policies, especially related to climate action, biodiversity, and carbon neutrality, have and will continue to influence forest management practices and timber availability in several ways. The European Union's commitment to carbon neutrality by 2050 highlights forests as essential carbon sinks. There is a danger that the focus on maintaining forests for carbon offsetting will indirectly reduce the availability of raw timber as logging activities will be constrained.

1. In your role of Commissioner for Agriculture what actions will you put in place in order to support the European timber industry to navigate these evolving policies? What actions will be taken so that the wood industry is not forced to relocate outside Europe due to the lack of raw material?
2. **A.** In the face of climate change, geopolitical disruption, and current legislative developments, the future supply of wood from European forests is at risk. In your role of Commissioner for Agriculture how will you guarantee that the multiple factors influencing wood supply, and their complex interrelationships will be taken into account in future legislations?  
**B.** The woodworking industry timescale is often in terms of decades. Companies investing in expansion, relocations, etc. need to have as precise as possible information regarding the medium to long-term supply of raw materials. Erratic policymaking and measures passed without impact assessments on the supply of timber have a detrimental effect on company decision-making. In your function as Commissioner for Agriculture, can you make sure that in future policy impact assessments on the supply of timber are properly performed?

3. The CAP can significantly contribute to increasing the wood supply and supporting the forestry value chain through afforestation, sustainable forest management, and rural development programs. By aligning its subsidies and incentives with sustainable forestry practices, CAP can help enhance timber production while maintaining environmental goals such as carbon sequestration, biodiversity conservation, and rural economic development. In 2026, an interim evaluation will assess the performance of the CAP 2023-27, while in 2027 the Commission will undertake a second performance review of each CAP Strategic Plan. Which resilience-building measures, such as promoting diverse tree species and sustainable logging practices, do you think CAP should be focused on to ensure forests remain healthy and productive over the long term, safeguarding sustainable wood supply for future generations?

### **Housing – Construction**

Background: The construction industry is a major contributor to a country's Gross Domestic Product (GDP). It encompasses a wide range of activities, including residential and commercial building, infrastructure development, and civil engineering projects. Construction plays a multifaceted role in driving development, creating jobs, and fostering overall societal well-being. The construction sector is indeed labor-intensive and a key source of employment. It offers a wide range of job opportunities for both skilled and unskilled workers, contributing to social stability and income generation.

Currently, across Europe, with very few exceptions, construction markets are weak. Over the last couple of years housing starts, housing completions and building permits have all fallen behind long-term averages. This has had a detrimental effect both on the many industries depending on the vitality of construction markets and on consumers. In many countries there is a shortage of good, affordable new buildings, with governments missing the targets that they have set themselves in terms of new construction. At the same time, despite measures such as the Affordable Housing Initiative, renovation rates are also disappointingly low.

The public sector should play a crucial role in driving construction activity through public infrastructure projects and public-private partnerships (PPPs). These investments help stimulate economic growth, particularly during downturns, by providing jobs and injecting capital into the economy.

### **Specific question for Dan Jorgensen: Commissioner-designate for Energy and Housing (focus on the housing mandate)**

Affordable and sustainable housing is becoming a critical focus in Europe due to increasing urbanization, rising housing costs and the need for climate action. European governments, policymakers, and developers should identify initiatives to address these issues by integrating affordability and sustainability in housing projects.

1. According to Eurostat, building permits in terms of floor area declined in the EU by almost 15% in 2023 compared to 2022. Early indications for 2024 point to building permits staying at very low levels, exacerbating existing shortages. On the supply side, there is a need for a reduction of the bureaucratic burden when it comes to

granting building permits. On the demand side, aspiring homebuyers need to be supported in times of higher interest rates. What kind of actions do you intend to take to address the twin challenge posed by supply and demand issues?

2. The building sector provides millions of jobs in roles such as engineers, architects, project managers and manual workers. The sector also generates indirect employment in related fields, such as materials manufacturing, equipment manufacturing and logistics. As technology reshapes the construction industry (*with new technologies transforming the way buildings and infrastructure are designed and constructed*), workers with relevant skills will be critical. What role will “skill, upskilling and reskilling” play in your mandate and how are you planning to coordinate with ongoing EU initiatives such as the European Bauhaus and the European Skills Agenda?
3. Some 40% of carbon emissions are generated by the built environment, a figure the EU has pledged to reduce. At the same time, we have a shortage of housing that necessitates the building of millions of more homes. How do you intend to ensure that by successfully addressing the housing crisis we don’t at the same time exacerbate the climate crisis?

### Climate action

Background: In a February 2024 Communication, the European Commission presented its assessment for a 2040 climate target for the EU and recommended reducing the EU’s net greenhouse gas emissions by 90% by 2040 relative to 1990. In her Mission Letter to Mr Wopke Hoekstra, Commissioner-designate for Climate, Net Zero and Clean Growth and Commissioner-designate for Taxation, Commission President Von der Leyen mandates him to make a legislative proposal to enshrine the 90% remission-reduction target for 2040 in the European Climate Law, as well as to prepare the climate policy architecture beyond 2030, including by organising strategic dialogues with industry and other stakeholders. Reaching such a target will involve both significant further cuts in emissions and a significant increase in removals.

### Specific questions for Mr Wopke Hoekstra, Commissioner-designate for Climate, Net-Zero and Clean Growth

1. With regards to removals, how do you envisage the target being shared across the four identified areas of 1) forests 2) agriculture 3) industrial removals via Carbon Capture and Storage (CCS), etc. and 4) carbon stored in products, including in the built environment?
2. Where do you see specific opportunities for large scale removals at an affordable price within the next 15 years?
3. Could you share more details into your plans regarding the strategic dialogues with industry?

### 4.1.4 Official communication partner

From 6-9 June, the European Union witnessed the world’s second-largest democratic exercise as citizens cast their votes in the 2024 European Elections. This moment was an opportunity for every citizen to shape the future of Europe, while also helping uphold democracy, as the more people vote the stronger democracy becomes.



The European Parliament recognised CEI-Bois' efforts in promoting the EP Elections during a Partnership Agreement Event organised for all communication partners of the European Elections 2024 Campaign in the presence of the President of the European Parliament, Roberta Metsola.



The UseYourVote campaign was launched by the European Parliament to encourage voter turnout.

CEI-Bois believes that democracy is not only a fundamental right but also a responsibility that each of us shares regardless of our political affiliation or views and should safeguard. This is why CEI-Bois decided to promote democratic engagement in the EU and to encourage citizens to play an active role in the European democratic process and published a series of posts, photos and videos on its social media, website and newsletters.

## 4.2 Wood promotion

### 4.2.1 European Wood Policy Platform - WOODPOP

The WoodPoP (European Wood Policy Platform) has been initiated by Finland and Austria, as part of the Austrian Wood initiative of the Austrian forest fund. This platform serves to promote wood-based policy dialogue and CEI-Bois is one of its active members, participating in different working groups.

At the beginning of August, members received a copy of the draft WoodPop Policy Paper “A Wood-based Circular Bioeconomy for a Sustainable Europe. Green Construction and Innovative Wood Solutions” and were invited to send comments. The draft WoodPop policy paper was then finalised during the Expert Group Meeting on 11 and 12 September 2024 attended by CEI-Bois in Norway.

During this event, representatives from governments and organisations working on wood policies had the opportunity to explore the timber headquarters of Save the Children in Oslo and enjoyed an insightful talk by Jørgen Tycho of architecture studio Oslotre. The journey then took the group to Brumunddal, home of the world's tallest all-timber building, where the core meeting took place on 11 September. To wrap up the event, delegates toured a wood fibre insulation factory run by Hunton, showcasing innovative wood-based solutions in action.

The policy paper provides the most important information and content to serve as a reference point for the political work of WoodPop members in political committees and individual discussions with ministries, parliaments, and the public.

The document identifies critical fields of action and the necessary structural short to long-term framework conditions, as well as suitable instruments and resources, for strengthening the wood-based circular bioeconomy in Europe. Amongst the different priorities identified by the policy paper as tools to increase the competitiveness of the wood industries and facilitate the use of wood in construction:

- Create enabling political, legal, financial, structural, and socio-economic framework(s) for sustainable integrated wood-based value chain(s).
- Encourage and advance designated pan-European, national and regional wood programs and initiatives, integrating best practices from European and national wood-related initiatives and actions, for supporting the transition towards a circular bioeconomy.
- Develop and adapt codes and norms to support the preferential use of wood and wood-based products.
- Consider an ambitious national wood construction quota in public procurement.
- Foster cooperation between public and private partners as accelerators to transition to a wood-based circular bioeconomy.
- Eliminate market and technical barriers to trade for European domestic wood producers and facilitate the adoption and recognition of international standards, while avoiding any unintended negative consequences (e.g. leakage effect).

The Policy Paper was acknowledged and made publicly available at the High-Level Meeting, which took place on 6 November 2024 in Brussels.



On 7 November, a conference titled “Wood Policy Innovation”, was jointly organised by Wood4Bauhaus, BioRegion, Wood Cluster Styria and WoodPop in Brussels.

The conference highlighted the vital role of the wood sector as a key driver of future competitiveness in housing and the climate debate, and encouraged greater recognition and support from the new EU Commission and EU Parliament. It showcased the latest state-of-the-art in building design with wood and how the public sector can support more biobased construction to combat climate change. The event targeted Members of the European Parliament and their staff, national and regional policy makers, EC staff and

experts, advocacy organisations and the R&I community, who were invited to join this policy discussion and networking event.

## 4.2.2 Wood4Bauhaus

The European Commission's New European Bauhaus calls for a creative, interdisciplinary, novel movement embedded in the society to imagine together a sustainable future and to engage on a transformative path towards affordable and beautiful living spaces in the urban and rural environment. A key step is the transformation of the building sector into a circular model that can also counteract the escalating climate crisis.



The European wood-based sector has launched the Wood Sector Alliance for the New European Bauhaus (Wood4Bauhaus) to establish an open platform that brings together its manifold stakeholders. This sectoral alliance was initiated by several umbrella organisations: the InnoVAWood EU network for wood research, innovation and education, the European Wood-Based Panel Federation (EPF), the European Confederation of Woodworking Industries (CEI-Bois), the European Federation of Building and Woodworkers (EFBWW) and the European Organisation of the Sawmill Industry (EOS). It has also the support of the Horizon 2020 project consortia BASAJAUN and WoodCircus. The WOOD4BAUHAUS alliance was confirmed by the European Commission as an official partner of the New European Bauhaus on the 30 March 2021.

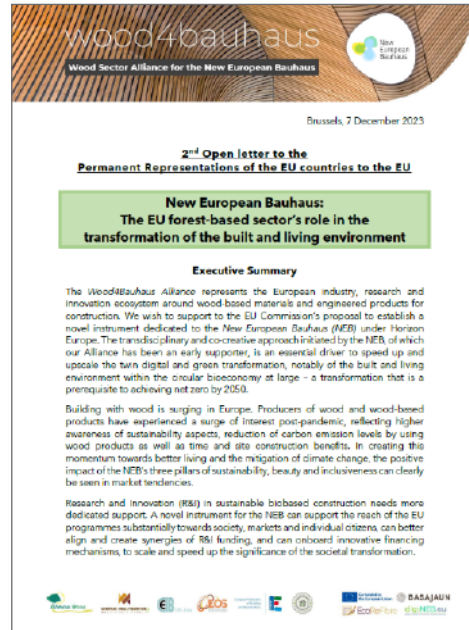
Wood, an extremely versatile natural material being part of a multitude of products, is a circular material par excellence. Long-life products using wood can store carbon for decades or even centuries in buildings and living spaces. They can also be re-used, remanufactured and recycled to further prolong the storage time. The alliance aims to raise awareness for the transformative power of the circular economy, put a spotlight on the versatility of innovative wood products and building systems, and facilitate dedicated co-creation partnerships with the wood sector for the New European Bauhaus.

### Open support letter for NEB

On 7 December 2023, the Wood4Bauhaus Alliance, of which CEI-Bois is member, published an open letter to all permanent representations of the EU countries to the European Union. With this letter, which received the confirmed support from 82 signatories of the W4B Alliance and representatives of 73 organisations in 21 countries, the Wood4Bauhaus Alliance wished to contribute further to the ongoing debate concerning the future role of NEB within the European funding programmes. To underline the important role of the NEB for the transformation of the built environment towards a sustainable, circular, and inclusive model, a list of detailed recommendations was presented, which aimed at strengthening NEB's presence in the EU funding programmes.

Key statements of the letter include:

1. Make Europe world leader in circular and regenerative construction
  - **BUILDING WITH BIOBASED MATERIALS** can become a major lever for climate restoration.
  - **INTEGRATING** the entire construction ecosystem requires collaboration of all involved actors along the whole value chain.
  - **NOVEL, ENHANCED & CIRCULAR BUILDING SYSTEMS** for carbon-positive, long-life bio-based materials and products fostering repair, reuse and recycling and tackling waste and environmental issues are the priorities for R&I.
  - **UP- and RE-SKILLING** must be accelerated in the entire construction ecosystem.
  - **A SYSTEMS STUDY** on carbon removals, storage and substitution must address how to best use biomass to combat climate change.
2. Ensure people-centred governance of the transformation
  - **NEB is a POWERFUL NARRATIVE** which people can easily identify with.
  - **SOCIAL SCIENCES & HUMANITIES (SSH)** must be integrated to succeed in mainstreaming the transformation.
  - **TRANSDISCIPLINARY R&I** for the sustainable built environment, to widen societal impacts and foster a fair and inclusive European Research Area.
  - **COMMUNICATING SCIENCE** and its benefits for citizens will break down silos and reach much more people in a direct way.
3. Boosting investment and funding support for upscaling R&I
  - **NEB** can raise **ACCEPTANCE** and **INVESTMENT READINESS** for into sustainable building principles and solutions in the bioeconomy.
  - **TECHNOLOGY AND MATERIAL NEUTRALITY** must be re-examined in the context of the climate crisis.



### New European Bauhaus Festival

On 9 April 2024, CEI-Bois took part in the official Opening Ceremony of the NEB Festival featuring a.o. EC President Ursula von der Leyen, Commissioners Elisa Ferreira and Iliana Ivanova, and Belgian Prime Minister De Croo.

This year's panel discussions covered a diverse array of topics, including architecture, education, and the future of construction, in the presence of esteemed speakers, industry

leaders in art, architecture, design, sustainability, innovation and much more. The Festival also put a spotlight on NEB's contributions to Ukraine's reconstruction.

Concluding the opening speeches, Hans-Joachim Schellhuber, Director General of International Institute for Applied Systems Analysis (IIASA), recalled that *"to reverse global warming, we shall use natural based materials such as timber"*.

### **New European Bauhaus Academy**

It was during this NEB Festival that the New European Bauhaus Academy was officially launched by Commissioner Iliana Ivanova. In her opening speech of the NEB Festival, EC President Ursula von der Leyen stated: *"I am proud that tomorrow we will officially launch the New European Bauhaus Academy. It will train a new generation of architects, engineers and construction workers. It will give them the knowledge and the skills they need to turn sustainable materials into #beautiful spaces."*

The NEB Academy is a flagship initiative of the European Commission, that has been created to accelerate the up- and re-skilling of architecture, construction, and engineering (ACE) professionals and adjacent actors. This network of training hubs across Europe that bundle regional competencies and facilitate access to contents on sustainability, circularity and bio-based material knowledges shall help facilitate a significant increase in the use of nature-based materials such as timber in the built environment by providing the training to enable this transition.

### **4.2.3 The Circular Choices Coalition**

CEI-Bois is a member of the Circular Choices coalition which brings together, as partners and supporters, a total of 20 EU trade associations, representing the biggest coalition ever from the forest-based bioeconomy sector at EU level. Together, they offer recyclable products and solutions generated from a renewable bio-based feedstock sourced in Europe, where they are manufactured with European technology. The sector represented by the coalition directly employs more than four million Europeans and represents €520 billion in annual turnover.

From the logs, wood products and renewable energy, to the construction and furniture and the pulp, packaging, board, tissue, and printing industries, the industries' focus on sustainable products and manufacturing processes not only reduces their environmental impact but also drives innovation and growth. Considering the sector's vast size, dynamism, and potential, the coalition aims at promoting the policy and market necessary conditions in the EU to scale-up the circular bioeconomy that our society so urgently needs.

The members of the coalition play a crucial role in the EU's pursuit of open strategic autonomy and will be an essential partner in driving the green transition of the economy. The forest-based bioeconomy sector's strategic nature is rooted in two key elements: its ability to provide a sustainable and low-carbon alternative to traditional fossil fuel-based industries, and its broad scope of integrated value-chains 'made in Europe' that supply to all 14 EU ecosystems.

The sector is also a hub of innovation and smart thinking, offering opportunities to improve yields, fibre properties, and disease resistance, as well as explore alternative uses for fibre and waste streams. Additionally, the development of bio-based products and processes can create new economic opportunities and jobs, contributing to a more sustainable and resilient society.

### Policy recommendations

In 2024, the coalition members revised their key policy asks and messages. They drafted a series of recommendations, calling for a new approach to the economic and climate challenges we face. They stressed that the EU must lead the way in balancing industry and environment, and bioeconomy provides the perfect framework for this. Looking ahead, it is crucial that the EU institutions build on the 2024-2029 strategic agenda aimed at strengthening the European manufacturing value-chains to retain their globally competitive position while optimising the EU internal market for bioeconomy products to scale up on domestic markets. Through this holistic approach and a new European competitiveness deal, Europe could become the leading continent for investing in the circular bioeconomy and creating good quality jobs.

### Events

Every 6 months, “Circular Choices” events are organised under each Presidency of the Council of the European Union.

Under the Belgian Presidency, the event was organised on 20 March, under the theme “Building EU open strategic autonomy through bioeconomy and innovation.” The event, opened by the Belgian Presidency of the Council of the European Union, included one interactive session with innovation case studies from companies of coalition members and a panel discussion with the participation of the European Commission, Cepi Chairman and the Belgian Federation of Enterprises.



Adrian Leip, Head of Bioeconomy sector at EU Commission’s DG Research and Innovation highlighted that *“three key concepts are directly linked to circular economy: strategic autonomy, resilience, and competitiveness.”* For which *“coherence is key and it is important not to have contradictions between pieces of legislation relevant to the bioeconomy.”*

In his video message, MEP Franc Bogovič, underlined the need for policymakers to remove barriers to the EU bioeconomy, including enhancing market access for bio-based products. Cepi Chairman, Marco Eikelenboom, emphasised the important role

the Circular Choices Coalition members play: one out of every five companies in Europe is related to the forest-based bioeconomy.

Under the Hungarian Presidency, it has been decided to put a greater focus on the human side of our industry. The event took place mid-November under the theme “Good industrial jobs in Europe”. Indeed, the transformation into a circular bioeconomy must be fair and inclusive to ensure the maintenance and creation of good quality jobs across the EU and in line with the creation of new avenues for innovation. The forest-based bioeconomy provides the perfect framework for this. The sector is already a hub of innovation and smart concepts, offering sustainable solutions and opportunities to explore new uses for fibre and by-streams.

The further development of bio-based products and processes in the upcoming years can create new economic opportunities and jobs, contributing to a more sustainable and resilient society. At the same time, such transformation requires young talent with new sets of skills as well as reskilling and upskilling the existing human resource. With this event, the coalition partners wanted to open a frank discussion on EU competitiveness and how investing in skills training and good industrial jobs is critical to boost the EU's economic growth and competitiveness, thereby contributing to building the open strategic autonomy of Europe.

#### 4.2.4 Boosting biotechnology and biomanufacturing in the EU

On 20 March, the European Commission published its new initiative on boosting biotechnology and biomanufacturing in the Europe. With this document, the EU Communication presents an overview of the current challenges and barriers for biotechnology and biomanufacturing and proposes actions to address these challenges.

Biotechnology is a central contributor to the modernisation of EU industry, playing a central role in a variety of industrial sectors including pharmaceuticals, textiles, chemicals, plastic, fuel, food, and feed processing. In this regard, the Commission seeks to identify and remedy obstacles to the biotechnology industry. The Commission presented its ‘Life sciences and biotechnology’ Strategy and Action plan in 2002. In its ‘Europe 2020’ Strategy, the Commission additionally set out to launch a ‘European Innovation Partnerships’ between the EU and national levels to facilitate the development and deployment of necessary technologies, which would include ‘building the bioeconomy by 2020’.



In the framework of the “Building the future with nature: Boosting Biotechnology and Biomanufacturing in the EU” communication, CEI-Bois published an informative flyer

on “Biomanufacturing, the circular bioeconomy and the European woodworking and sawmill industries”.

With this flyer, CEI-Bois wanted to communicate the role and commitment of our sector in a more sustainable and competitive EU economy. For bio-based wood products to deliver their climate benefits to their maximum potential in the short to medium term will be predicated on the security of supply of forest-based biomass as a key biomanufacturing feedstock and specifically timber into the construction industry. Meeting the supply demand for forest biomass and a transition to a sustainable and circular bioeconomy should be addressed not by exclusively relying on new raw material, but also through material efficiency and recovery, including the collection of wood for reuse, recycling or energy recovery at the end of life. The European Commission has a role in helping to foster and secure an increase in the supply of woody biomass plus a role in supporting its most efficient use.



To add a somewhat original and entertaining touch to the document, readers were also given the opportunity to test their understanding of biomanufacturing and the bioeconomy in an original quiz, available in the brochure and on CEI-Bois’ LinkedIn page. By answering seven questions, they could then find out whether they were more like Ursula von der Leyen, Wopke Hoekstra or Fox News!

Moreover, on 14 March, the EC Vice-President Maroš Šefčovič, has organised a Dialogue on Forest-based Bioeconomy, in the Berlaymont building of the European Commission. The Dialogue was in conjunction with the Bioeconomy Changemakers Festival. The meeting was strictly on invitation and five CEOs of the wood and pulp & paper industry were invited to participate. The meeting was run under the Chatham House Rule.

The Invited CEOs were Ilkka Härmälä (CEO Metsä Group), Hans Sohlström (CEO Stora Enso), Marco Eikelenboom (CEO Sappi Europe and President of CEPI), Juergen Bergner (CEO HS Timber) and Rui Correia (CEO Sonae Arauco).



On the occasion of the Forest-based Bioeconomy dialogue, Mr Juergen Bergner stated: *“The wood industries and the sawmills are already now a lively part of the circular economy, and we are already operating according to the cascading use of wood. Now that the Regulation establishing a Union certification framework for carbon removals has been positively agreed amongst the policy makers, in order to support a high value added use*



*of our biomass, we shall now reflect on how to monetise the construction-stored carbon on the voluntary carbon market as this will offer significant opportunities to direct finance towards bio-based construction, which in turn has a positive impact on the reduction of greenhouse gas emissions by substituting more emission-intensive materials. Europe's forests are growing in stock and surface. The availability of wood in Europe is shrinking, which is putting massive pressure on the prices of wood and the attractiveness as available construction material – wood used in construction may last more than 100 years. The oldest wooden building was built in 607 AD and is the world's oldest surviving wooden structure.”*

On 16 July, CEI-Bois & EOS attended a breakfast-debate with Barna Kovács, Counsellor for agriculture, bioeconomy, research and innovation at the Permanent Representation of Hungary to the EU and Secretary General at BIOEAST, as the Hungarian EU Presidency was expected to prioritise bioeconomy research and innovation, aiming to engage EU Member States and EU.

During the meeting, it was reiterated that the Presidency plans to adopt two Council Conclusions related to R&I, having the objective to examine the possibility of establishing a new innovation and research partnership on the circular bioeconomy, focusing on Central and Eastern European countries, including the Western Balkans and the Eastern Partnership countries.

Moreover, on 21 July, on the occasion of the FAO Advisory Committee on Sustainable Forest-based Industries (ACSFI), CEI-Bois attended the presentation by Bauhaus Earth of the pillar of the study launched in August 2024 on “Forest Product Demand and Supply in a Bioeconomy Transition. The possible role of wood in the context of climate change mitigation.” The Study is expected to be concluded in April 2025 and it will run in parallel to the EU commission revision of the Bioeconomy Strategy. One chapter of this study will analyse mega trend in supply and demand of forest products: mega trend in sectors beyond construction (building and constructions, paper and packaging, textile, plastic, biochemicals, energy, etc), another chapter instead will be focused on global urbanisation process and need for housing infrastructure. Moreover, a chapter will be dedicated to a review “supply and demand” on forest products, while the conclusive chapter will be dedicated to outlining the climate change mitigation using forests products (ad hoc analyses along the value chain).

#### **4.2.5 FAO Advisory Committee on Sustainable Forest-based Industries**

Since February 2023, CEI-Bois is a Member of the FAO Advisory Committee on Sustainable Forest-based Industries (ACSFI). Established in 1960, ACSFI is a FAO statutory body composed of senior executives from the private industry sector worldwide. It meets yearly with the main objective of providing guidance on activities and programme of work of the FAO For-



estry Department on issues relevant to the paper and forest products industry, in support of member countries efforts to progress towards sustainable development.

The ACSFI has the broad mandate to:

- provide guidance to FAO on concepts, fundraising opportunities and relevant policy and regulatory matters in the field of sustainable production and consumption of forest products,
- advise on required support to FAO member countries and the incorporation of private sector perspectives into FAO's Programme of Work and Budget,
- identify key emerging issues from across forest product value chains and review studies and statistical data compiled by FAO on forest products and forest industries,
- propose new activities for implementation by FAO, including international meetings, events and initiatives,
- jointly organise with the Committee and other partners,
- maximize the potential for the forest-based industries to benefit from innovations and efficiency improvements,
- improve communication, knowledge and information exchange and training on good practices between members, the private sector and FAO.

The Committee normally defines working priorities for a two-year period, coinciding with the FAO biennium and the term of the chairpersons. In recent years, the Committee has produced several scoping studies and working papers for members.

On 21-25 July, CEI-Bois and EOS took part in the FAO Advisory Committee on Sustainable Forest-Based Industries (ACSFI) and in the 27<sup>th</sup> Session of the FAO Committee on Forestry (COFO 27).

On that occasion, the Director of FAO's Forestry Division, Mr Zhimin Wu underscored the importance of collaboration between the public and private sectors as it is crucial for advancing policy support, data, innovation, investment, and market-driven solutions.

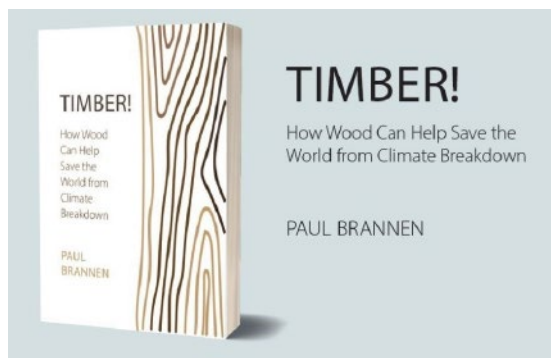
Partnerships among FAO, the private sector, and other stakeholders are deemed essential for promoting the forest-based bioeconomy. Mr Wu expressed his congratulations to the incoming ACSFI Chair, Mr José Carlos da Fonseca Junior, and ACSFI Vice-Chair, Ms Silvia Melegari, on their appointments.

As the ACSFI is a leading platform to advocate for forest-based bioeconomy, reflections are ongoing to organise an event during the COP30 Thematic Days and Forestry Pavilion (November 2025, Belém, Brazil).

#### **4.2.6 Timber! How wood can help save the world from climate breakdown**

On 27 June, Paul Brannen, CEI-Bois Director of Public Affairs, published his book 'Timber! How wood can help save the world from climate breakdown', set to cause controversy in the conservative world of construction and in the more traditionally-minded elements of the environmental movement.

The carbon emissions generated by concrete and steel construction are well-known. Why then are we not using more carbon-friendly building materials? In a passionate and compelling argument, Paul advocates the use of timber in buildings wherever possible. His controversial and counterintuitive argument is clear: planting trees is not enough to reduce the amount of carbon in the atmosphere, we also must chop them down and use more wood in our buildings. The felling of trees is of course followed by new sapling planting so that the whole sustainable process can begin again i.e. no deforestation should occur.



This is the first book to take timber from the margins to the mainstream, from the forests to the cities. It tackles head-on questions about sustainability, safety, the biodiversity of commercial forests and the pressures on land use. The case for timber as a construction material is persuasively made – the creation of new engineered timbers with the structural strength of steel and concrete enable us for the first time to build wooden skyscrapers – and draws on the latest developments in engineering and material science. In addition to the familiar forestry models, the book advocates alternatives such as wood farming and agroforestry that bring with them added biodiversity gains for farms. With the built environment currently responsible for 40 per cent of the world's carbon emissions, Paul Brannen's message is unequivocal: we must change how we build. Timber! offers fresh and inventive ideas that over time could see our expanding cities storing more carbon than our expanding forests.

#### 4.2.7 PEFC International 2024 Forest Forum

On 16 May, Claudiu-Nicolae Sonda, represented CEI-Bois at the PEFC International 2024 Forest Forum in Paris in a panel discussion on mitigation and decarbonisation for climate change.



His presentation highlighted:

- the essential role timber can play in helping decarbonise the EU building sector,
- the main EU legislation that could empower the wood sector to deliver its ambitious goals,
- other EU initiatives in the circular bioeconomy that are sending the right signals and setting the correct premises for future action.

#### 4.2.8 Building with wood! Taller, bigger: is the sky the limit?

This was the title of the presentation that our Director of Public Affairs, Paul Brannen, gave on 18 April during the “Rencontres Filière Bois” conference in Libramont, Belgium, in front of an audience of over 200 people.



Wood is a key solution to tackling the challenges of climate change. Its use must therefore become much more widespread. But current practices leave plenty of room for improvement. This is the key analysis of the organisers of this event.

In his presentation, Paul stressed the many advantages and opportunities of building with wood and concluded by saying that *“wood-based construction and insulation products have the biggest potential to contribute to reaching ‘net zero’ CO2 emissions by 2050 by removing carbon from the atmosphere and storing it for a long period”*.

#### 4.2.9 Antwerp Declaration calls for a European Industrial Deal

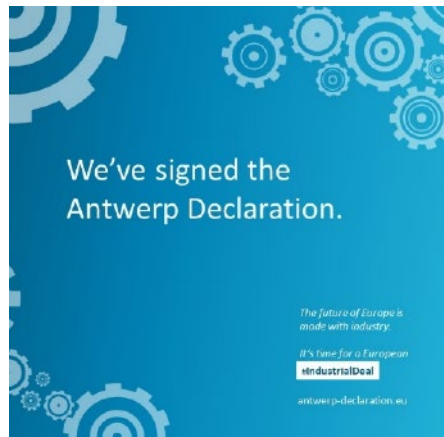
On 20 February, the “European Industry Summit: a business case for Europe” took place in Antwerp, under the auspices of the Belgian Presidency of the Council of the EU.

On that occasion, industry leaders spanning different industrial sectors presented ‘The Antwerp Declaration for a European Industrial Deal’ to Belgian Prime Minister, Alexander De Croo and EC President, Ursula von der Leyen.

The declaration underlines the commitment of industry to the reindustrialisation and transformation of Europe and outlines urgent industry needs to make Europe competitive, resilient, and sustainable in the face of dire economic conditions.

More precisely, the Declaration outlines 10 concrete actions to transform Europe into a global leader in sustainable industry:

- Industrial deal at EU Strategic Agenda’s core.
- Strong public funding with Clean Tech Fund.
- Make Europe a top competitive energy supplier.
- Focus on needed European infrastructure.
- Boost EU’s raw materials security.
- Increase demand for net zero & circular products.



- Leverage & improve the single market.
- Create a smarter innovation framework.
- Let entrepreneurship thrive to overcome challenges.
- Ensure a structure for achieving results.

CEI-Bois joined the signatories of the “Antwerp Declaration for a European Industrial Deal”.

#### 4.2.10 Past and future: shaping Europe’s industrial policy

On 18 April, CEI-Bois attended the POLITICO event on “Past and future: shaping Europe’s industrial policy”, the highlight of which has been a one-on-one interview with Mr Enrico Letta, the former Italian prime minister and author of the report on the future of the Single Market.

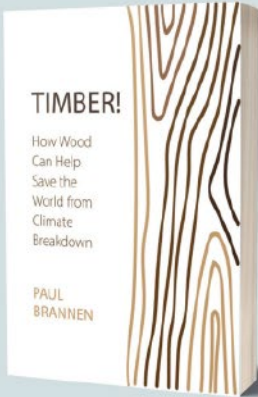
Published on the same day, the “Letta Report” asks for a strong political commitment to empower a new Single Market. This new framework must be able to protect the fundamental freedoms, based on a level playing field, while supporting the objective of establishing a dynamic and effective European industrial policy. As per the report, Europe cannot, and should not, cede its role as a manufacturing leader to others. In addition to the existing four freedoms - the free movement of people, goods, services and capital, the report proposes a fifth freedom: to enhance research, innovation and education in the Single Market.

The Letta Report covers topics pertaining to circular economy and sustainability, underlining among others the need for:

- embedding circular economy principles within the Single Market,
- better leveraging of public procurement practices,
- championing the development of standards for circular product design,
- strategic using biomass for high-value applications, such as materials and chemicals that can substitute for fossil-based or critical raw materials.



A panel discussion took place with MEPs Anna-Michelle Asimakopoulou (EPP, Greece), Ville Niinistö (The Greens/EFA, Finland), and Tsvetelina Penkova (S&D, Bulgaria) on the topics of the EU Green Deal and EU competitiveness.



## TIMBER!

How Wood Can Help Save the World from Climate Breakdown

PAUL BRANNEN

The built environment is currently responsible for 40 per cent of the world's carbon emissions. Why then are we not switching away from steel and concrete towards more climate-friendly building materials? In his new book, Paul Brannen's message is unequivocal: we must change how we build. *Timber!* offers fresh and inventive ideas that over time could see our expanding cities storing more carbon than our expanding forests.

This is the first book to take timber from the margins to the mainstream, from the forests to the cities. Brannen tackles head-on questions about sustainability, safety, the biodiversity of commercial forests and the pressures on land use. The case for timber as a construction material is compellingly made – the creation of new engineered timbers with the structural strength of steel and concrete enable us for the first time to build wooden skyscrapers – and draws on the latest developments in engineering and material science. In addition to traditional forestry models, the book explores alternatives such as wood farming and agroforestry that bring with them added biodiversity gains for farms.

Available in paperback ISBN 9781788217354  
Order via your local bookshop or Amazon.



PAUL BRANNEN is Director of Public Affairs for the European Organisation of the Sawmill Industry and the European Confederation of Woodworking Industries. He also works for Timber Development UK.

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## 4.3 EUDR update

Undoubtedly, the entire year of 2024 was characterised by the actions targeted at policymakers in order to make them realise the difficulties associated with the application and implementation of the European Regulation against deforestation (EUDR). CEI-Bois has been actively involved in meetings of the Deforestation Platform organised by the EU Commission, while it regularly informed its members about the development of this complicated dossier.

### **What is the EUDR is about?**

In force since 29 June 2023, the EUDR has been introduced to limit the EU market's impact on global deforestation/forest degradation and biodiversity loss, promote deforestation-free supply chains, reduce the EU's contribution to greenhouse gases (GHG) emissions– and protect human rights and the rights of indigenous people.

The Regulation is based on a basic premise, thus the prohibition on introducing into the market, marketing, or exporting relevant commodities and products – unless they meet three conditions:

- a) They do not contribute to deforestation or forest degradation.
- b) They have been produced in accordance with the relevant legislation of the country of production (which includes not only compliance with environmental regulations, but also those related to land-use rights, forest management, labour, tax and /or human rights laws).
- c) They are covered by a due diligence statement.

The due diligence statement is the cornerstone around which the obligations of operators and traders are defined to ensure that products and commodities do not cause deforestation or forest degradation. The Regulation also regulates how to carry out the due diligence that should conclude with the corresponding statement.

First, it requires the collection of comprehensive information, data, and documents about the products, the country of production, and the specific geolocated plots where the relevant commodities were produced. This also includes conclusive and verifiable information that the products are free of deforestation and that the commodities have been produced in accordance with local legislation, among other aspects.

Based on this information, a risk assessment will be carried out against a series of criteria, which include, among others: the level of risk assigned to each country (or parts of it) by the Commission, the presence of forests, the prevalence of deforestation or forest degradation in the country (or in part of it), the reliability of the information, the complexity of the supply chain, or the presence of indigenous peoples. This assessment should be carried out at least once a year.

Finally, risk mitigation measures should be adopted, which may include gathering additional information, conducting independent studies or audits and/or adopting supplier

support measures. The due diligence requirements are simplified if all commodities and products come from low-risk countries (obligation to comply only Article 9 of the Regulation).

Additionally, the Regulation requires companies to publicly report on their due diligence system annually and keep all documentation related to the due diligence for at least five years.

Following pressure from global partners and stakeholders about the imminent entry into effect of the EUDR, at the beginning of October 2024, the European Commission proposed a delay of 12 months to the implementation and issued guidance to offer additional support.

The new Proposal for a regulation to amend the EUDR does not change the substantive rules laid down in the EUDR but postpones their date of application by 12 months. If approved, the change would delay the application of these obligations for large companies until 30 December 2025 and until 30 June 2026 for micro-undertakings or small undertakings. Additionally, the Proposal postpones the obligation imposed on competent authorities to carry out the necessary checks and customs controls. The Proposal would also adjust the repeal of the current EU Timber Regulation to account for the delay in the implementation of the EUDR. However, the Commission has indicated that the Information System where businesses will register their due diligence statements will be ready before the law's entry into application so that operators and traders can submit statements earlier.

The Commission has also proposed to delay the classification of countries or regions as low or high risk. The proposed delay is until 30 June 2025, a 6-month delay from the current date included in the legislation as adopted. If the Parliament and Council approve the proposal, the delay to implementation will take effect quickly.

The delay was approved by the European Council on 16 October, without any request for amendments. On 23 October, the European Parliament voted on the adoption of the urgent decision (rule 170) in order to proceed with voting on the Proposal for amending Regulation (EU) 2023/1115 as regards provisions relating to the date of application.

In this framework a Joint Statement "Affected sectors and industries call on the European Parliament to swiftly adopt the urgent procedure for the Commission's proposal on EUDR postponement" was issued and is reported below.



## JOINT STATEMENT

### **Affected sectors and industries call on the European Parliament to swiftly adopt the urgent procedure for the Commission's proposal on EUDR postponement**

The undersigned signatories represent a vast range of actors, from primary producers to manufacturers and traders, supplying to European citizens essential goods in scope of the EU Deforestation Regulation (EUDR). While we fully support the regulation's objective to combat global deforestation, it is crucial to ensure that it is implemented under the right conditions, including adequate phase-in time, to be both effective and feasible.

We therefore call on the European Parliament to swiftly adopt the urgent procedure for the European Commission's proposal to extend the implementation period of the EUDR by an additional 12 months.

We consider that the use of the urgent procedure (rule 170(6)) for this file is both well justified under the current circumstances and necessary to provide the right tools for the EUDR implementation preparation.

We thank you very much in advance for your consideration.

#### **Signatories:**

CEI-Bois – European Confederation of Woodworking Industries  
CEPF – Confederation of European Forest Owners  
Cepi – Confederation of European Paper Industries  
COCERAL – European association of trade in cereals, oilseeds, rice, pulses, olive oil, oils and fats, animal feed and agrosupply  
Copa-Cogeca – European Farmers and Agri-Cooperatives  
ELO – European Landowners' Organization  
EOS – European Organisation of the Sawmill Industry  
EUSTAFOR – European State Forest Association  
FEFAC – European Feed Manufacturers' Federation



Indeed, previously, on 2 October, the European Commission published a proposal to postpone the application of the EUDR to give affected parties more time to prepare for compliance with their obligations under it. In essence, the Commission proposed a one-year postponement of the application of the EUDR's rules, i.e., until 30 December 2025 (30 June 2026 for micro- and small undertakings). The deadline for finalising the country benchmarking system (designating countries as low, standard, or high risk – the Commission has indicated that a “large majority” of countries would come within the ‘low risk’ category) would also be postponed – to 30 June 2025.

Alongside the proposal to delay the EUDR's application, the Commission also updated the EUDR FAQ document to provide 40+ new answers to questions raised by stakeholders and issued a detailed draft Guidance Document with the aim of clarifying the scope of application of the EUDR. Among other points, the Guidance Document clarifies the definition of various key terms, including “operator”, “placing on the market” and “export”.

Regarding the obligations for SMEs operating under EUDR, the EU Commission provided also the following clarification:

- Less obligations for downstream SME operators: no need to exercise due diligence or submit a due diligence statement, when it was already done by the upstream operator, i.e. the operator that first put the commodity or derived product on the market.
- Lighter mitigation measures for all SME operators: SMEs are not required to put in place policies and procedures to mitigate risks of non-compliance of relevant products.
- No reporting obligations: SME operators are not subject to the annual reporting obligations of their due diligence system.

The Commission also published the general principles for the methodology it will apply to the EUDR country benchmarking system, in a communication on the Strategic Framework for International Cooperation Engagement. It also explains that affected entities who already have suitable compliance measures in place will be able to submit their EUDR due diligence statements before the proposal is adopted – the Commission indicated that the Information System (where due diligence statements are to be registered) will start accepting registrations in early November 2024 and will be fully operational in December 2024.

On 25 September, CEI-Bois participated in the first train-the-trainer session on the Information System (IS) of the EUDR. The Information System can be used manually and is straight-forward, although very time-consuming in the case of large volumes of information. In this case, however, having the geolocation information in GeoJSON format (easy to upload in bulk) is very helpful.

On 23 July, the Financial Times published a letter “Barking up the right tree” by CEI-Bois and EOS Public Affairs Director Paul Brannen. The letter stresses that bureaucracy does not solve the deforestation problem and that the European wood industries are fully supportive of the aims of the EU's deforestation-free products regulation (EUDR).

However, it also underlines the fact that companies have struggled with its onerous requirements and that it has morphed into a prime example of the very “burdensome micromanagement” criticised by European Commission president Ursula von der Leyen in her re-election speech to the parliament in Strasbourg. Not only was the letter published in the Financial Times, it has also found further resonance in other media all over Europe and beyond.

Previously, on 22 July, on initiative of CEI-Bois and EOS, a letter was sent to the European Commission President, Ursula von der Leyen, urging for a delay of the entry into application of the EUDR. The letter reiterated that the EUDR obligations to which our industries are now subject need to be implemented by law in a shorter timeframe than has ever been imposed on any other industrial sector affected by comparable European legislation. As a consequence of the unprecedented tightness of the deadline, the transition period envisaged does not enable the objectives assigned to it to be met before the deadline expires.

A similar letter was sent as well to the Hungarian Presidency reiterating the need for a delay: “the objective of “making Europe great again” can only be achieved through realistic policies and implementable measures, which survive the proportionality and necessity tests.”

An extract of the joint letter is reported here:


*“[...] As a consequence of the unprecedented tightness of the deadline, the transition period envisaged does not enable the objectives assigned to it to be met before the deadline expires.*

*Moreover, in view of the current absence of country benchmarking and the late time-limit for the adoption of the relevant implementing acts, the EUDR benchmarking rules are deprived of any effectiveness and cannot fulfil the stated objective of reducing the regulatory burden for operators and traders in the most critical moment for them,*

**FINANCIAL TIMES**

**Letter: Barking up the right tree**

From Paul Brannon, Director Public Affairs, CEI-Bois — European Confederation of Woodworking Industries, Brussels, Belgium



Charred trunks are seen on a tract of Amazon jungle in Porto Velho, Brazil © Reuters

JULY 23 2024 🗨️ 📄

The European wood industries are fully supportive of the aims of the EU’s deforestation-free products regulation (EUDR), the practical failings of which, from a global south perspective, were perceptibly outlined by Alan Beattie (“Brussels can’t see deforestation for trees in jungle of policies”, [Opinion](#), July 19).

To date, the implementation of the EUDR is a salutary reminder that the road to hell is indeed paved with good intentions. As companies have struggled with its onerous requirements, it has morphed into a prime example of the very “burdensome micromanagement” criticised by European Commission president Ursula von der Leyen in her recent re-election speech to the parliament in Strasbourg.

*i.e. the implementation of the new obligations. Indeed, operators and traders will need to apply a higher level of scrutiny in their due diligence irrespective of the origin of the products in preparation for the implementation of the EUDR. Therefore, it is of utmost importance that a delay of the entry into application of the EUDR is granted. Please be assured that our industries strongly condemn illegal logging and deforestation and hence we support the aims of the EUDR. We believe that from an environmental point of view, these activities cause irreparable damage leading to a loss of biodiversity. From an economic point of view, illegal logging disrupts markets and drives down timber prices, resulting in unfair competition that hampers efforts to implement sustainable forest management. At the same time, deforestation has a direct and negative impact on the availability of wood, which is vital to the very existence of our sector. Consequently our industries are understandably at the forefront of the fight against illegal logging and deforestation[...]"*



Finally, considering that the obligations of the EUDR will apply to both the importing and exporting of products in scope to and from the Union, the customs declaration system will have to be uniform and will need to accommodate the differences existing between the export and import declarations. To that end, the Commission has created the following new TARIC measure types:

- 776: Import control on deforestation and forest degradation
- 777: Export control on deforestation and forest degradation

In addition, the Commission has introduced specific TARIC conditions and document codes to identify when a product is excluded or included in the scope of the EUDR and, in the former case, when the relevant due diligence statements have been provided or whether an exemption is applicable.

## 4.4 Sustainability and Forests Related Issues

### 4.4.1 Carbon Removals Certification Framework (CRCF)

On 30 November 2022, the European Commission adopted a proposal for the so-called Carbon Removals Certification Framework (CRCF), a first EU-wide voluntary framework to reliably certify high-quality carbon removals. The proposal establishes rules for the independent verification of carbon removals, as well as rules to recognise certification schemes that can be used to demonstrate compliance with the EU framework, to ensure the transparency and credibility of the certification process. To be certified, carbon removals must be verified by an independent certification body and meet all four Q.U.A.L.I.T.Y criteria:

- **Quantification:** carbon removal activities must be measured accurately and provide unambiguous benefits for the climate.
- **Additionality:** carbon removal activities must go above existing practices and what is required by law.
- **Long-term storage:** to ensure permanent storage, certificates are linked to the duration of carbon storage.
- **Sustainability:** carbon removal activities must preserve or contribute to sustainability objectives such as climate change adaptation, circular economy, water and marine resources, and biodiversity.

On 20 February 2024, EU Council and European Parliament negotiators reached a provisional agreement on the CRCF, which was officially adopted in the European Parliament's plenary in April. Before it can enter into force, the agreed text of the CRCF must also be officially approved by the Council.

The agreement distinguishes between “permanent carbon removal” – such as direct air capture (DAC) and bio-energy with carbon capture (BECCS) – as that deemed capable of storing CO<sub>2</sub> for several centuries, and “temporary carbon storage in long-lasting products” – such as wood-based construction – as that which has a duration of at least 35 years. It also mandates the European Commission to establish methodologies for the certification of carbon removals, with a priority on the most mature and impactful activities. In the case of carbon storage in products, the European Commission will prioritise methodologies on wood-based and bio-based construction products.




**PRESS RELEASE**

**CEI-BOIS AND EOS WELCOME THE OUTCOME OF THE TRIALOGUE DISCUSSIONS ON THE CARBON REMOVALS CERTIFICATION FRAMEWORK**

*BRUSSELS, 20 February 2024 - The European Confederation of Woodworking Industries (CEI-Bois) and the European Organisation of the Sawmill Industry (EOS) welcome the outcome of the triilogue discussions between the European Parliament and Council on the Carbon Removals Certification Framework.*

In particular CEI-Bois and EOS welcome the wording which recognises and endorses wood's ability to store carbon in products in the built environment:

*“... temporary carbon storage in long-lasting products (such as wood-based construction) of a duration of at least 35 years and that can be monitored on-site during the entire monitoring period”.*

This endorsement should help encourage a greater use of wood products by the construction industry as it endeavours to lower its carbon footprint and make its contribution to delivering the Green Deal.

It is now clear that the EU recognises that carbon stored in wood products is indeed ‘a high-quality carbon removal’ the value of which should be recognised and deployed as part of the plan to achieve net zero emissions by 2050.

That a wide range of timber construction and renovation products already exist and the use of timber in construction is an established practice should enable their use to be rapidly increased thereby significantly increasing the amount of carbon removed from the atmosphere now and safely stored in the built environment.

\*\*\*\*\*

**For further information**  
 Paul Brannen (Director of Public Affairs): [paul.brannen@cei-bois.org](mailto:paul.brannen@cei-bois.org) - +44 787 856 5406

In a joint press release, CEI-Bois and EOS welcomed the outcome of the triologue discussions between the European Parliament and Council on the Carbon Removals Certification Framework.

As the CRCF will establish the legal framework around the certification of carbon removals, the technical details of tailored certification methodologies for specific activities are handled under the parallel work of the European Commission-led Expert Group on Carbon Removals. CEI-Bois is represented in this expert group by its Technical Advisor, Dr Andrew Norton. The Expert Group on Carbon Removals met physically in April and October 2024, and held online workshops dedicated to specific topics (biochar, peatlands, agriculture and forestry, bio-based buildings, etc.) throughout the second half of the year.

#### 4.4.2 Packaging and Packaging Waste Regulation (PPWR)

In November 2022, the European Commission proposed to revise and strengthen the existing Packaging and Packaging Waste Directive (PPWD) by tabling the new Packaging and Packaging Waste Regulation (PPWR) with the idea of reducing the negative environmental impacts of packaging and packaging waste, while improving the functioning of the internal market.

The revision aims to prevent the generation of packaging waste, reduce its quantity, and promote reuse and refill. It also aims to ensure that all packaging on the EU market will be recyclable in an economically viable way by 2030, while increasing the use of recycled plastics in packaging. Key measures include proposing targets for packaging waste reduction at the Member State level, and mandatory reuse targets for economic operators for selected packaging groups.

While the proposed PPWR is expected to impact the entire timber value chain, it will mostly affect the wooden packaging and pallet sector. Therefore, CEI-Bois joined the European Federation of Wooden Pallet and Packaging Manufacturers (FEFPEB), its sectoral Member, in providing information to EU policy makers to ensure that the PPWR will recognise the environmental benefits associated with wooden packaging and avoid any unnecessary administrative and financial burden, thereby impeding the sector's positive contribution to a sustainable packaging Single Market.

Late 2023 and throughout 2024, CEI-Bois has supported FEFPEB by providing timely intelligence and by remaining available for any joint advocacy activity. One example of joint advocacy activity is the Joint Statement on High-Quality Recycling and Recyclability in the Packaging and Packaging Waste Regula-



tion proposal of 8 November 2023, in which the cosignatories shared recommendations regarding the European Parliament's ENVI Committee Report, specifically relating to the definitions of 'high-quality recycling' and 'recyclability'.

Another example of joint advocacy activity is the Joint Statement on High-Quality Recycling in the Packaging and Packaging Waste Regulation proposal of 11 November 2023, in which the cosignatories shared recommendations regarding what was, at that time, the most recent Spanish Presidency compromise text.

Following a lengthy legislative process and intense trilogue negotiations, the Council and the European Parliament reached a final compromise on 3 March 2024, which was officially adopted by the European Parliament in April. The Council is now expected to also officially approve the agreement, and the PPWR is expected to be officially adopted by the end of 2024. Overall, compared to the initial European Commission proposal, the final compromise on the PPWR appears to be more sensitive to the specificities of the different packaging subsectors, which increases the implementability of the new regulation on the ground.

Despite the positive outcome, some questions remain open regarding the PPWR's implementation in the coming months and years, particularly via the future publication of delegated acts and the development of standards.

CEI-Boi will continue to monitor the dossier and will engage in advocacy activities with FEFPEB as necessary.

#### **4.4.3 Ecodesign for Sustainable Products Regulation (ESPR)**

In March 2022, the European Commission published its proposal for a new Ecodesign for Sustainable Products Regulation (ESPR), which is the cornerstone of the European Commission's approach to more environmentally sustainable and circular products. The proposal built on the previous Ecodesign Directive, which at the time covered only energy-related products. The ESPR establishes a framework for setting ecodesign requirements for products placed on EU market or put into service, with aim of:

- improving their environmental sustainability (reduce their overall carbon footprint & environmental footprint over their life cycle), and
- ensuring their free movement within internal market.

It also establishes a digital product passport system, sets mandatory green public procurement requirements, and creates a framework for preventing the destruction of unsold consumer products. The ESPR applies to any physical goods placed on market or put into service, including components and intermediate products. Excluded from its scope are food, feed, medicinal products, veterinary medicinal products, living plants, animals and micro-organisms, products of human origin, products of plants and animals relating directly to their future reproduction, and vehicles (covered by sector-specific legislation).

In January 2023<sup>2</sup>, the European Commission confirmed previous indications that, at this stage, the ESPR would not include under its scope timber as intermediary product or wooden construction products as end-use products (covered instead by the scope of the revised Construction Products Regulation).

However, furniture falls under the ESPR's scope, which is why CEI-Bois has provided support to the European Furniture Industries Federation (EFIC) on several occasions during the latter's advocacy leadership on this dossier. Starting from November 2022 and throughout 2023, CEI-Bois co-signed together with other sectoral associations more than 5 EFIC-led advocacy documents aimed at the European institutions, making recommendations which would also safeguard the interests of the woodworking industries in any future event. These interests have also been accounted for given that CEI-Bois and CEFIC share several Members in common.

Throughout 2024, CEI-Bois continued monitoring ESPR legislative developments and regularly shared intelligence with members. For example, on 24 May 2024, CEI-Bois informed its members about the online information session organised by the European Commission on what was expected to be the final text of the EPSR. On that occasion, CEI-Bois also shared with the members the slides presented during the event and the link to the recording<sup>3</sup>, while also informing about the European Parliament's plenary adoption the day before of the final compromise on the EPSR.

The EPSR entered into force on 18 July 2024 and will apply from 24 months after this date. Its implementation will gradually cover all the products placed on the EU market, following a prioritisation list executed via delegated acts. As mentioned

above, products covered by sectoral legislation, including construction products, are exempted. Nevertheless, CEI-Bois will continue monitoring future developments.



#### 4.4.4 Green Claims Directive (GCD)

In March 2023, the European Commission adopted the proposal for a Green Claims Directive (GCD), requiring companies to substantiate claims they make about environmental aspects or performance of their products and organisations using robust, science-based and verifiable methods. It would apply in a business-to-consumer context,

2 In January 2023, the European Commission launched its Call for Evidence for an Initiative on "New product priorities for Ecodesign for Sustainable Products", where a number of new products (including 12 end-use and 7 intermediary products) and horizontal measures were identified as potentially suitable for first action under the ESPR.

3 <https://webcast.ec.europa.eu/online-information-session-on-the-new-ecodesign-for-sustainable-products-regulation-espr-24-05-22>



with the goal of preventing greenwashing and the proliferation of sustainability labels and certifications. Notably, products fall under the scope of the GCD only when they are not already regulated by sectoral legislation in terms of environmental sustainability claims. Examples of such sectoral legislation potentially exempting economic operators from compliance with the GCD include the Construction Products Regulation, the ESPR, and the Packaging and Packaging Waste Directive.

This point is essential to CEI-Bois and its members as it is very important that economic operators are not facing overlapping requirements from multiple legislation. In July 2023, CEI-Bois corresponded with the European Commission on the scope of the GCD. The European Commission clarified at that time that the criterium for determining whether the GCD applies resides in the existence in sectoral legislation of detailed rules for communicating, substantiating, and verifying all types of environmental claims made. If this is the case, then existing or upcoming sectoral legislation has precedence over the GCD. However, in the case of environmental claims for which such substantiation rules do not exist under existing or upcoming sectoral legislation, then the GCD applies. The European Commission furthermore clarified that this does not mean that the whole sector would be exempt only by the fact that there are rules in place on substantiation of some types of claims. It is possible that sectoral legislation does not always cover all possible types of claims. For example, when it comes to claims on carbon footprint or carbon neutrality of wooden packaging, if not tackled specifically in another legal act – e.g., under PPWR, the GCD will still apply.

In June 2024, the Environment Council adopted its General Approach on the GCD, and it includes the above-mentioned examples of sectoral legislation that could exempt economic operators from GCD compliance. The General Approach will form the basis for negotiations with the European Parliament on the final shape of the directive. The European Parliament had already adopted its negotiating position in March, and trilogue negotiations are expected to begin in the new legislative cycle. CEI-Bois will continue monitoring the legislative developments.

#### **4.4.5 Corporate Sustainability Due Diligence Directive (CSDDD)**

The European Commission proposed the Corporate Sustainability Due Diligence Directive (CSDDD) in February 2022, laying down obligations for companies regarding actual and potential human rights adverse impacts and environmental adverse impacts, with respect to own operations, the operations of subsidiaries and the operations of business partners. It also establishes legal liability for violations of these obligations. Moreover, it introduces the obligation for companies to adopt and put into effect a transition plan for climate change mitigation.

Following the adoption of the European Parliament's official position in April and the Council's approval in May, the Corporate Sustainability Due Diligence Directive (CSDDD) entered into force on 5 July 2024. Member States have to transpose the Directive into national law and communicate the relevant texts to the European Commission by 26 July 2026. One year later, the rules will start to apply to the first group of companies, following a gradual approach (with full application on 26 July 2029):

- From 2027: companies with >5000 employees and a worldwide turnover >1.5bn EUR.
- From 2028: firms with >3000 employees and 900m EUR worldwide turnover.
- From 2029: all remaining companies within scope (including >1000 employees and worldwide turnover >450m EUR – lowest threshold).

CEI-Bois will continue to monitor future developments during the implementation phase.

#### 4.4.6 Renewal of IPBC approval

At the initiative of EuroWindoor and as part of the Biocides Task Force, from the beginning of 2024, CEI-Bois started looking into the renewal of IPBC<sup>4</sup> in PT8<sup>5</sup> (expected end of July 2025), specifically into the possibility that IPBC might end up with an Endocrine Disruption property for Human Health, de-facto triggering the exclusion criteria. This would result in an initial stage in a call for evidence on alternative substances via a public consultation by the European Chemicals Agency (ECHA).

After internal consultations, and in preparation for a worst-case scenario, CEI-Bois decided to support, on behalf of some its members, two external studies following ECHA guidance documents to identify alternatives to IPBC or IPBC-based biocidal products. The two studies would determine if there are enough alternative products authorised in Member States to cover industrial and professional needs. They would also specify if identified alternatives have the same efficacy, target organisms, field of use, application method and user category. Based on the input provided by the involved members directly to the external consultants, the two studies would also cover relevant use cases for the timber industry, including construction wood treatment, treatment of fresh-cut timber, and industrial treatment of CLT. Eventually, the results of the two studies would serve as the basis for responding to the expected public consultation.

Following a political decision by the competent authorities in charge of the renewal process, IPBC was considered a candidate for substitution. While the risk of a ban is excluded, the renewal period of IPBC is expected to be shorter than in the past. In any case, a public consultation was launched by ECHA in September. In cooperation with EuroWindoor and with the technical input its own members, as well as based on the results of the two studies, CEI-Bois submitted its response to the ECHA public consultation in October.

#### 4.4.7 Expert Group on Forest-based Industries and Sectorally Related Issues

On 17 June 2024, the CEI-Bois team attended the Expert Group on Forest-based Industries and Sectorally Related Issues. The meeting was opened by a keynote of Maive Rute, Deputy Director-General at DG GROW, followed by a presentation of the Biotechnology and Biomanufacturing Initiative.

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4 3-iodo-2-propynylbutylcarbamate (IPBC) is a fungicide for protection of wood against wood-rotting fungi and wood-discolouring fungi (blue stain) indoors and outdoors (Use classes 2 and 3)

5 PT 8 – Wood preservatives: used for the preservation of wood, from and including the sawmill stage, or wood products by the control of wood-destroying or wood-disfiguring organisms, including insects. This product type includes both preventive and curative products.

Among the different topics, DG GROW presented a forest data dashboard, the Carbon Removals Certification Framework, while the meeting ended with a presentation on the “EFI report on Barriers to investment in forests, forestry and the forest-based sector” and the “FAM study on Substitution potential and climate impact in the EU forest value chain”.



This meeting was also the occasion for CEI-Bois and EOS to present the key messages of the joint Manifesto. Paper copies of the Manifesto were provided to the participants of the meeting.

## 4.5 Wood in construction

### 4.5.1 Recast of Energy Performance of Buildings Directive (recast EPBD)

On 15 December 2021, the European Commission published its proposal for the recast of the Energy Performance of Buildings Directive (EPBD recast). The proposal was part of the “Fit for 55” package, setting the vision for achieving a zero-emission building stock by 2050. It aimed to accelerate building renovation rates, reduce GHG emissions and energy consumption, and promote the uptake of renewable energy in buildings. It also followed up on key components of the three focus areas of the Renovation Wave Strategy, specifically tackling energy poverty and worst-performing buildings, making sure public buildings and social infrastructure lead the way, and decarbonising heating and cooling, while including the intention to propose mandatory minimum energy performance standards.

Following work in the European Parliament and the Council, which resulted in a provisional agreement formally adopted by both institutions, the recast EPBD was cited in the Official Journal of the EU on 8 May and entered into force on 29 May.

Implementation has now moved to the Member States level, which must transpose the directive into national legislation, generally within 2 years. At EU level, the European Commission is expected to work on different delegated acts, including a delegated act which will establish an EU-wide methodology for the calculation of whole lifecycle greenhouse gas emissions of buildings (based on Article 7 and seeking to change Annex III), to be issued by the end of next year.

To support it with its work, the European Commission has initiated technical assistance on whole lifecycle GHG reporting for buildings via a service contract to a consortium of consultants. The specific tasks of this technical assistance are to:

- assist the European Commission in identifying issues with calculating the whole lifecycle GHG emissions of buildings,
- engage with expert stakeholders to present solutions to the identified issues,
- provide practical guidance for Member States for the whole lifecycle GHG emission calculation and reporting and for the development of national decarbonisation roadmaps,
- support the European Commission with any relevant technical input and justifications for the content of delegated act.

On behalf of CEI-Bois, its Technical Advisor, Dr Andrew Norton, has expressed his interest to participate as expert and stakeholder in the work of consultant. Moreover, on 30 September, the CEI-Bois Construction Working Group organised an internal brainstorming meeting on the topic, in which it outlined its position and discussed next possible steps. The exchanges in the meeting materialised in a letter with preliminary comments submitted by CEI-Bois to the team in charge of the technical assistance on 14 October 2024. The letter addressed crucial subjects such as lifecycle GWP calculation, biogenic carbon storage and dynamic LCA, as well as adequate conditions for a proper implementation by microenterprises and SMEs.

CEI-Bois will continue following the developments around the implementation of the recast EPBD and engaging with the EU institutions and the consultants in charge of the technical assistance as necessary.

#### **4.5.2 Revision of Construction Products Regulation (New CPR)**

On 30 March 2022, the European Commission released a package of European Green Deal proposals to make sustainable products the norm in the EU, to boost circular business models, and to empower consumers for the green transition (so-called “Circular Economy Spring Package”). As previously announced in the Circular Economy Action Plan (itself adopted in March 2020), the European Commission proposed new rules to make almost all physical goods on the EU market more friendly to the environment, circular, and energy efficient throughout their whole lifecycle from the design phase through to daily use, repurposing, and end-of-life.

A very important part of the package was the proposal to revise the existing Construction Products Regulation, which aimed to boost the internal market for construction products and to ensure that the regulatory framework in place was fit for making the built environment deliver on sustainability and climate objectives.

Following half a year of trilogue negotiations, the European Parliament and the Council reached a provisional agreement in December 2023. On 10 April 2024, the Parliament officially adopted this agreement under the corrigendum procedure (allowed the European Parliament to adopt the legal text, subject to a later legal and linguistic scrutiny). Following the EU legislative elections in the summer of 2024, the new legislature adopted the adapted legal text, which is expected to enter into force in December 2024/January 2025.

During 2024, CEI-Bois continued to closely monitor the developments around the CPR revision, both individually and together with other relevant EU-level stakeholders. For example, on 6 June, CEI-Bois attended the physical meeting of Construction Products Europe (CPE)'s CPR Working Group. Taking



place in Brussels, the meeting focused on the new CPR and included reporting on the recent work of CPE's internal Working Groups and Task Groups. The meeting also included an in-depth presentation of the new CPR by Mr Oscar Nieto (DG GROW). Following the meeting, the CEI-Bois secretariat could provide significant updates and timely intelligence to its members on a variety of topics, including on the CPR implementation, the assessment of environmental sustainability performance of construction products, the assessment and verification systems, the Digital Product Passport, circularity, environmental labelling, product requirements and voluntary harmonized standards proving conformity, relation to other legislation, etc.

Moreover, during the CEI-Bois Construction Working Group meeting of 26 June, Ms Olympia Dolla, Convenor of Construction Product Europe's Sustainability Task Group, gave a presentation on the future of Environmental Product Declarations in the context of the new CPR. Ms Dolla noted the benefits and the challenges of the new system put in place by the new CPR with regard to the calculation and disclosure of the environmental sustainability performance of construction products. On the one hand, the main benefit is the solidification of EN 15804 and its indicators as the main reference point. On the other hand, complying with the new requirements will come with significant administrative and financial effort by companies, as well as with market disruption risks due to insufficient third-party verifiers.

Awaiting the official adoption of the new CPR and the start of its implementation, CEI-Bois is taking preparatory steps, such as prioritising together with its members on which secondary legislation announced in the new CPR to focus on in the coming years. Therefore, focus will be placed on the delegated and implementing acts announced in the following articles:

- Article 5.5 empowers the European Commission to adopt delegated acts to determine for the product families or product categories and for the elements covered by standardisation requests the following elements:
  - voluntary or mandatory threshold levels in relation to the essential characteristics,
  - classes of performance in relation to the essential characteristics,
  - those essential characteristics which always have to be declared by manufacturers.
- Article 5.6 on CWFT.
- Article 7.1 on the product requirements.


- Article 75.1 empowers the European Commission to adopt delegated acts to set up a construction digital product passport system.
- Article 10.2 on the applicable AVS.
- Article 6.1 on the implementing acts via which the European Commission will introduce harmonised technical specifications when CEN will not deliver on standardisation.

In the coming months, the CEI-Bois Construction working group will organise internal brainstorming meetings on each of the delegated and implementing acts above in order to exchange views, formulate common messages, and consider advocacy activities.


### 4.5.3 Reaction to fire performance for solid wood panelling and cladding

On 10 November 2023, the European Commission (DG GROW) adopted the delegated act on the conditions for classification, without testing, of solid wood panelling and cladding. As a reminder, this implies that, for external or internal wood panelling and cladding, third party testing needs to take place before the first placing on the market whenever there is any kind of treatment (kiln drying excluded) applied to these products.


The new delegated act will negatively affect the chemical, preservation, and wood-working sectors. The changes are very concerning as all products and products combinations would now have to be classified according to EN 13501-1, which requires enormous financial and time-consuming efforts. Also, limited test capacities in Europe would lead to a mismatch between demand and available products with certified reaction to fire; this can be seen as trade barrier.



CEI-Bois



EOS



wei-ieo

Brussels, 23 November 2023

**European timber and wood preservation industries request for objection against the Commission Delegated Regulation amending Commission Decision 2006/213/EC table 2 as regards the necessary conditions for classification without need for further testing for panelling and cladding, and wood ribbon elements as regards their reaction to fire**

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➤ On the 10<sup>th</sup> of November 2023, the European Commission adopted the *Delegated Regulation amending Commission Decision 2006/213/EC table 2 as regards the necessary conditions for classification without need for further testing for panelling and cladding, and wood ribbon elements as regards their reaction to fire*. The new delegated regulation is now under a 3-month scrutiny period, during which **both the European Parliament and the Council of the European can raise objections**.

The European Confederation of Woodworking Industries (CEI-Bois), the European Organisation of the Sawmill Industry (EOS), and the European Institute for Wood Preservation (WEI-IEO), as well as their member organisations are therefore urging the Parliament and the Council to exercise this prerogative in order to **reject the delegated regulation in its current form as the 90-day transition period proposed by the Commission is practically unfeasible despite the industry's best efforts**.

The entry into force of the new delegated regulation with such a short transition period would have a massive impact on the use on wood products in panelling and cladding applications ~~and therefore for the~~, negatively hitting the European wood industry, as all products and products combinations would now have to be tested on their own and classified according to EN 13501-1, which requires enormous financial and time-consuming efforts. Limited test capacities in Europe would lead to a mismatch between demand and available products with certified reaction to fire. This will reduce the competitiveness of wood products on the EU market by creating an unlevel playing field between large companies and SMEs, which could potentially be forced out of the market.

The European timber industries, including the wood preservation industry and the manufacturers of the wood preservation products, are already seeking practical ways to adapt to the new requirements in an effective and efficient manner. Nevertheless, even the most ambitious scenario requires an adaptation period of at least two years to enable the sector to systematically test products of different surface coatings, chemical treatments or other modification, and to enable a CWFT classification with underlying reaction to fire classes for treated solid wood panelling and cladding.

Such a transition period would enable manufacturers to systematically test treated solid wood panelling and cladding and demonstrate, through stable test results or other existing data, their ability to declare a certain class of performance without testing or further testing of these products, as foreseen in Article 27(5) and Article 36(1)(a) of Regulation (EU) No. 305/2011. This would reduce administrative burdens, avoid supply problems throughout Europe and costs for manufacturers.

Thanking you for considering our request regarding this crucial matter for the European timber sector, our experts are available for further clarifications.

CEI-Bois – The European Confederation of Woodworking Industries - Transparency register n° 470333818389-37  
EOS – European Organisation of the Sawmill Industry - Transparency register n° 024776016336-52  
WEI-IEO - European Institute for Wood Preservation - Transparency register n° 81739087951-41

After having consulted the members of the CEI-Bois Fire Task Force, a joint letter was published on 23 November by CEI-Bois, EOS and WEI-IEO, the European Institute for

Wood Preservation, urging national and European policymakers to reject the delegated act due to the too short transition period (90 days).

Following an extended scrutiny period (triggered in the Council), the delegated act entered into force and started applying on 22 August 2024, without an extension of the mentioned transition period.

At the initiative of CEI-Bois' Austrian member, the first online meeting to clarify the activities in the sector and to analyse possible common steps regarding the implementation of the amended decision had already started in October 2023. Two further meetings took place in November 2023, and another one in June 2024. The four meetings materialised in:

- the establishment of a technical expert group for the goal of preparing an action plan document with industry next steps, focused mainly on a proposal for a test plan to collect technical data allowing the re-classification without further testing of treated wood panelling and cladding,
- the presentation of two leading testing projects, in Austria and France, which could be part of the test plan,
- the drafting of the CEI-Bois proposal for the test plan (primarily dealing with the procedure for testing coated and treated panelling and cladding made of solid wood) and its submission to the European Commission,
- a CEI-Bois response to the European Commission's additional questions regarding the test plan.

CEI-Bois is currently awaiting a reply from the European Commission, hoping for a green light to the proposed testing plan, which would be triggered as soon as possible afterwards.

#### **4.5.4 EU Roadmap for the Reduction of Whole Life Carbon of Buildings**

As set out in the Renovation Wave, the European Commission (DG ENV) intends to develop a roadmap for the reduction of whole life carbon (WLC) in the building sector. The intention is to provide an overview of the importance of life cycle thinking in addressing building emissions and to set out the need for targeted building-related measures to reduce these emissions. While a smaller set of EU Member States has gathered data and set out national roadmaps and strategies, an EU-wide roadmap for the reduction of whole life cycle emissions of buildings has not yet been developed.

For its preparation of the WLC Roadmap, the European Commission relied on the assistance of external consultants and of a new dedicated Working Group on EU Whole Life Carbon Roadmap (of which the CEI-Bois Technical Advisor, Dr Andrew Norton, is a member). Based on technical work undertaken by the two, the European Commission would draft the official roadmap.

The publication of the European Commission's document was initially expected in the spring of 2024. For now, however, the WLC Roadmap has still not been published, but it remains a possibility under the new European Commission.

## 4.5.5 End-of-Waste Criteria of Construction and Demolition Waste

### Construction & Demolition Waste Management Protocol

In August 2024, the European Commission (DG GROW) published the revised EU Construction & Demolition Waste Management Protocol, including guidelines for pre-demolition and pre-renovation audits of construction works. It aims to enhance confidence in construction and demolition waste (CDW) management processes and increase trust in re-used products and recycled materials. As CDW is the largest waste stream in the EU, better management can deliver significant environmental, economic and social benefits.



The new comprehensive document combines the previous 2016 protocol and the 2018 Guidelines for waste audits before demolition and renovation of buildings.

The revision was conducted by the consultant RPA Europe, with the support of three stakeholder working groups. Relying on the technical support of its Members, CEI-Bois participated in Working Group 1 on pre-demolition audit and selective demolition by providing written feedback to the draft text and attending a dedicated stakeholder meeting.

### Background data collection for future EU end-of-waste criteria of construction and demolition waste

In August 2024, the European Commission (DG GROW) also published the Final Report of the background data collection for future EU end-of-waste criteria of construction and demolition waste. This study assessed the prioritisation for the introduction of possible future European end-of-waste (EoW) criteria for a list of ten pre-selected CDW and by-product streams, including wood.

According to the findings, there was a general positive acceptance and willingness among stakeholders to introduce EU EoW criteria. Moreover, the results showed the highest potential for possible future EU EoW criteria for the waste and by-product streams of aggregates, concrete, fired clay bricks and gypsum, followed by average potential for asphalt, inert insulation, plastic foam insulation, rigid plastics, and wood. The results also showed a clear outlier for the stream of building products for reuse. The report advised addressing the highest scoring waste streams first to achieve a higher impact.

The study was conducted by the external consultant TAUW, and it included an EU-wide survey, which took place between 10 May and 31 August 2023. According to DG GROW information, it will be up to the new European Commission to decide whether to propose



new EU EoW criteria for any of these waste streams via implementing acts adopted based on the Waste Framework Directive.

**Final ranking of the CDW stream:**

Rank	CDW waste stream
Third tertile	Aggregates
	Concrete
	Fired Clay
	Gypsum*
Second tertile	Asphalt
	Inert insulation
	Plastics foam insulation
	Rigid plastic
	Wood
First tertile	Building products for re-use

**Higher potential**  
\* the sensitivity analysis shows that the results for gypsum vary more compared to the other streams

**Average potential**

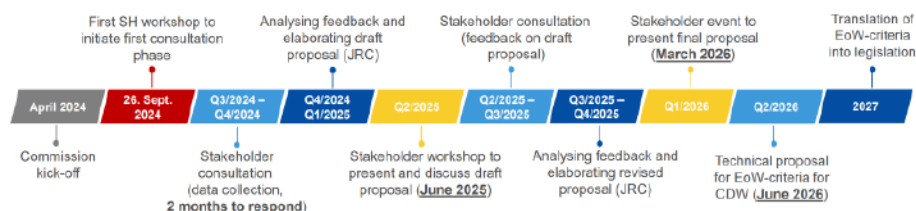
**Lower potential**

\*TAUW 2024 Background Data Collection for Future EU End-of-Waste Criteria of Construction and Demolition Waste – GROW/2022/OP/0015, Deliverable 3 Final Report on background data and information collected (Task 2)



Notably, preparatory and technical work on the development of EU EoW criteria for mineral CDW was kicked-off by the European Commission (DG ENV and DG GROW) on 26 September 2024, with a dedicated stakeholder workshop.

The tentative timeline shows that the European Commission’s Joint Research Centre (JRC) is expected to present a technical proposal for EU EoW criteria for mineral CDW in June 2026, which will then possibly be translated into legislation via implementing acts starting from 2027 (the decision to do this or not rests with the European Commission).



As shown during the workshop, regardless of the waste stream, there are generally three conditions for EU EoW classification:

- the substance or object is to be used for specific purposes,
- a market or demand exists for such a substance or object,
- the substance or object fulfils the technical requirements for the specific purposes and meets the existing legislation and standards applicable to products.

While wood is not among the waste streams in the priority list for developing EoW criteria, CEI-Bois will continue to monitor the developments around other materials, which can set precedents for future policymaking.

#### 4.5.6 EU Taxonomy for Sustainable Activities (construction focus)

The EU Taxonomy for Sustainable Activities (EU Taxonomy) is a classification system that defines criteria for economic activities that are aligned with a net zero trajectory by 2050 and the broader environmental goals other than climate. It aims to help direct investments to the economic activities most needed for the transition, in line with the European Green Deal objectives. Its cornerstone is the Taxonomy Regulation, which entered into force on 12 July 2020, and which established 2 climate and 4 environmental objectives:

- climate change mitigation,
- climate change adaptation,
- the sustainable use and protection of water and marine resources,
- pollution prevention and control,
- the protection and restoration of biodiversity and ecosystems.

The Taxonomy Regulation also stipulates that economic activities can reach these objectives if they satisfy 4 cumulative conditions:

- make a substantial contribution to at least one objective above,
- do no significant harm to any of the other 5 objectives,
- comply with the minimum safeguards,
- comply with the technical screening criteria (also known as the performance criteria).

Moreover, the Taxonomy Regulation also allowed the European Commission to establish the actual list of environmentally sustainable activities by defining technical screening criteria for each environmental objective through delegated and implementing acts.

Over the years, the European Commission has adopted several Taxonomy-related delegated acts covering the 2 climate objectives, and, in June 2023, it also proposed the so-called Environmental Delegated Act. This delegated act established the technical screening criteria for the remaining 4 environmental objectives in relation to a number of economic activities. CEI-Bois took particular interest in the technical screening criteria aimed at reaching the environmental objective “Substantial contribution to the transition to a circular economy” in relation to the economic activities “construction of new buildings” and “renovation of existing buildings”. More specifically, the technical screening criteria establishing requirements regarding the disclosure of life cycle Global Warming Potential (GWP), and the use of primary raw material.

During the second half of 2023, CEI-Bois expressed on multiple occasions its concerns around the draft Taxonomy Environmental Delegated Act, primarily regarding the feasibility of compliance with the high thresholds for the use of secondary materials in new construction and renovation. Nevertheless, the document was adopted in November 2023 by the European Commission with its initial wording, and it entered into force in January 2024.

In parallel, a new Platform on Sustainable Finance was established with the overall goal of adding new economic activities under the EU Taxonomy, and a Taxonomy Stakeholder Request Mechanism was set-up as tool for stakeholders to influence further

changes in economic activities and the associated technical screening criteria (existing or new). CEI-Bois took advantage of this opportunity and reiterated its position on the then-adopted Taxonomy Environmental Delegated Act (requesting a modification) via the Taxonomy Stakeholder Request Mechanism by participating in a dedicated survey on 11 December 2023.

On 18 March 2024, CEI-Bois participated in the European Commission webinar on “Level(s) and the EU Taxonomy: Navigating changes to sustainable finance rules for buildings”. During the webinar, representatives of the European Commission (DG ENV, DG GROW, and DG FISMA) informed



about next steps envisaged at that time for the EU Taxonomy (focus on construction and real estate), as follows:

- the newly established Platform on Sustainable Finance was mandated to work on the new activity “Maintenance of infrastructure”,
- the Platform on Sustainable Finance was assessing the stakeholder feedback received in December 2023 via the Stakeholder Request Mechanism,
- as part of this assessment, in relation to the possible revision of existing activities, the priority was on transitional activities and activities affected by recent policy or legislative updates (for example, the recast of the EPBD) and technological developments; there are no deadlines for these reviews,
- the European Commission was planning to provide more support on the usability and implementation of the criteria included in the EU Taxonomy, e.g. through FAQs, by the end of 2024.

#### 4.5.7 Fourth Plenary Meeting of the High-Level Forum Construction

On 24 April 2024, CEI-Bois attended in Brussels the fourth plenary meeting of the High-Level Forum Construction (HLCF). Hosted by the European Commission (Construction Unit of DG GROW), the event saw the participation of a wide range of stakeholders from the EU construction ecosystem. It was kicked-off and moderated by Ms Katharina Knapton-Vierlich, the Head of the Unit for Construction, while the keynote speech was delivered by Ms Maive Rute, the Deputy Director-General of DG GROW.

The meeting consisted of three parts:

- Overview of strategic challenges and the state of play of the EU construction ecosystem.
- Discussion on the implementation of the Transition Pathway including action at EU level, national level and by industry.
- Collaborative workshop on future EU priorities for the construction ecosystem.

CEI-Bois participated in the session on green construction, where it could emphasise the importance of new construction alongside the renovation of existing buildings in increasing the energy performance of Europe's future building stock. Moreover, CEI-Bois could welcome the strengthening of environmental sustainability aspects in recently revised construction regulation, while at the same time urging the European Commission to support the industry to implement the new ambitious requirements by simplifying the administrative burden wherever possible.

Overall, it was apparent during the event that the European Commission was well aware of the unprecedented crisis facing the construction sector and of the need to find immediate solutions to redress the situation.

## 4.6 Social Affairs

### 4.6.1 Work Programme for the European Sectoral Social Dialogue of the Woodworking Industries

The social partners, the European Federation of Building and Woodworkers (EFBWW) and the European Confederation of Woodworking Industries (CEI-Bois) believe in the importance of a strong and autonomous European social dialogue for the woodworking sectors for a sustainable and prospering woodworking industry. The social partners have agreed to continue to strengthen their collaboration to sustain this.

On the European level and in the framework of their joint initiatives, EFBWW and CEI-Bois will consider the repartition of responsibilities between the European and National level and will respect the role and autonomy of the national social partners in determining their labour market and terms and conditions of employment by themselves.

This working programme was adopted on 21 May 2024, during the European Sector Social Dialogue Wood Plenary meeting. It serves as a guideline for the activities of the European social partners of the woodworking sectors for the years 2024-2029. This working programme constitutes a non-exhaustive framework for possible topics of interest between EFBWW and CEI-Bois and may, according to the developments in the EU agenda be updated to better fit the needs of the woodworking industries.

#### **The twin transition - towards a just and fair European industrial policy and attractive industry**

The pathways to green and digital transitions are not predetermined, and the twin transition can affect workers and companies both positively and negatively. How we shape the digital and green transitions depends to a great extent on inclusive and well-thought-out policy-making and the social dialogue.

The European Green Deal together with the new European industrial strategy will have an important impact on our industries. Wood will play a vital role as raw material for the European circular and bioeconomy as well as a source for renewable energy. The EU attributes to wood an outstanding function in construction (New European Bauhaus

Initiative). The Green Deal has initiated a huge number of initiatives, strategies and legal texts which have been issued by different Commission's departments (DG's) impacting the woodworking industries. However, the overall future impact will be difficult to measure and to be foreseen. This creates an atmosphere of uncertainty and unpredictability for companies and employees. The coming years will be marked by the national implementation processes and first experiences for companies, employees and the economy.

The green transition is accompanied by the digital transformation which is, compared to other related sectors such as construction, more and more entering the sector with automation, robotisation and prefabrication. However, the potentials of new technologies are not fully explored, and new ones are expected to emerge. The social partners agree that there are opportunities for the sector (e.g. efficiency, productivity) and for the employees (e.g. improved working conditions, less heavy loads) but also challenges such as intensification of work, increased work complexity which can lead to psycho social risks and more monotonous work.

The twin transition represents, on the one hand, a significant opportunity for the wood-working sectors regarding the creation of new jobs and new professions due to new market opportunities, new technologies, etc. On the other hand, they will also have an impact on the organisation and content of work (automation, robotisation, Artificial Intelligence, etc.) and on working conditions (requirements for new skills, new health and safety risks, etc.) as well as on green sustainability and efficiency of companies.

Both, opportunities and challenges can exacerbate the labour shortage in the industry. Therefore, it is important to improve the attractiveness of the woodworking and forestry sector by offering quality employment with fair and decent work conditions and foster a level playing field for companies.

EFBWW and CEI-Bois are committed to continue to address these issues in the framework of their joint activities and to reflect the voice of workers and companies more closely in the debate on a strengthened competitiveness and attractiveness of the forestry and woodworking sectors at national, European, and international level. In addition, the social partners will resume the promoting of use of wood in construction within the European wood-based sector Wood4Bauhaus Alliance of which both social partners are members. Concerning this latter aspect, the social dialogue will also promote the further research in new applications and properties of wood, making it usable for an even broader use.

### **Training & Education and Skills**

The twin transition will require workers and companies to adapt to new skills needs and job profiles. The CEDEFOP European Skills Index forecasts that implementing the European Green Deal is to bring 2.5 million extra jobs to Europe's economies by 2030. However, this data is general and not giving an insight into sectoral needs of new skills and professions. Skills intelligence and long and short term skills needs analysis is important. Social partners on sectoral but also on company level are best placed to understanding what those jobs look like and how we can educate, train and upskill people to access them.

These challenges can also turn into opportunities for the sector. New professions, rising qualification requirements within occupations, new skills sets, upskilling in connection with progressive forms of work organisations can, together with fair, decent and healthy working conditions, lead to higher attractiveness of the woodworking sector. The demographic change and in particular the ageing of the population and the workforce, combined with the difficulties observed in several Member States to attract and maintain young people in the woodworking sectors, remain a challenge, both for companies and for workers.

EFBWW and CEI-Bois will address the impact of the twin transition on employment with special focus on skills intelligence, skills development and professional education. The social partners will raise awareness among their members on the topic to improve their engagement and commitment on sectoral and national level. Joint recommendations will be developed, and best-case examples will be shared.

### **Health & Safety**

Despite the overall reduction in the number of work-related accidents, improving health and safety in the workplace continues to be an important field of action for the woodworking sectors. More attention towards the problem of occupational diseases is especially requested.

The social partners of the woodworking sector share the commitment to policy and practices for healthy and safe workplaces.

The green and digital transition will change tasks and working processes, will introduce new materials, substances and technologies, all this can improve health and safety at workplaces but can equally lead to new hazards. The speed at which the green economy is expected to expand could lead to skills gaps, with inexperienced workers involved in processes that they have not been trained for. The EU Strategic Framework on occupational safety and health (OSH) for 2021-2027 is a framework to limit occupational hazards in Europe but needs to be operationalized and transformed into specific action and initiatives also on sectorial level. However, the role of social partners is crucial to develop new health and safety measures.

CEI-Bois and EFBWW are committed to raise awareness among their members about anticipation of new emerging OSH risks. But to the same extend, the social partners will be engaged in promoting the improvement of existing OSH measures and address the problem of occupational diseases. The social partners will exchange good practises and develop recommendations for their member organisations.

### **Strengthening industrial relations**

Performing industrial relations are a major element of a level playing field for economic activities. Shaping working conditions in all its aspects by joint agreements is a cornerstone in this respect and the best guarantee to avoid and to fight competition by wage dumping or other kind of dumping related to working conditions.

EFBWW and CEI-Bois support the strengthening of autonomous industrial relations within the woodworking sectors. They also reaffirm the primary responsibility of the national sectoral social partners, through autonomous industrial relations, for finding a common understanding about the organisation of their national labour market.

Recognising the different traditions and structures of industrial relations in Europe the European Social Dialogue aims at supporting and fostering the industrial relations at national levels. To this end EFBWW and CEI-Bois consider also European agreements and guidance as useful and build our activities on the Open Method of Coordination.

## 4.6.2 RESILIENTWOOD

### Background

The European woodworking industries are a major employer in particular in rural areas, where they play an important role in the social development of people in regions. At the European level, the social dimension is reflected in the European sectoral social dialogue for the woodworking sector of which the officially recognised social partners are the European Confederation of the Woodworking industries (CEI-Bois) and the European Federation of Building and Woodworkers (EFBWW). The two organisations have been active in social dialogue activities since the mid-1990s. This dialogue

has resulted in numerous the drafting of joint positions, the organisation of events and meetings, the publication of documents and the participation in EU co-funded projects, all of which aimed at improving industrial policies, strengthening industrial relations, addressing the skills gap and attractiveness of the sector as well as improving the well-being of the workers and strengthening and promoting the European social dialogue.

The RESILIENTWOOD project is co-funded by the European Union and follows the same path. It complements the previous work carried out of the European woodworking social partners, e. g. in their joint project “Perspectives and challenges of the woodworking industries in Europe” (2017-2019), that focused on the attractiveness of the sector and produced a first analysis (case study for Portugal) of the image of the sector among young generations. The project also builds on the “Bolster Up II” project, which aimed at fostering the concept of European Core Qualifications in the European furniture and woodworking industries. The current project incorporates new elements, notably the gender perspective and the post Covid-19 focus, that make it innovative compared to the previous projects. When considering the attractiveness to the younger generations, special attention is devoted to the role of education, and in particular student mobility and the possible contribution of an “Erasmus for Apprenticeships” program.

The objective of the RESILIENTWOOD is to offer to social partners with concrete recommendations to identify and tackle specific challenges in the woodworking sector through strengthened social dialogue. While some of those challenges have been known



for some time (e.g. implications caused by the ongoing demographic changes in the sector's workforce), others emerged with the recent Covid-19 pandemic and the energy crisis that followed. In particular the project focuses on the adaptation of the industry and its outlook in times of crisis, including the expected technological changes in the industry and its adaptation needs, as well as the need to increase the attractiveness of the sector for skills attraction and retention. The challenge is not just attracting young and passionate people to the woodworking field but, most importantly, keeping them there.

Overall, the project contributes to promote and strengthen the social dialogue in the woodworking sector in accordance with Article 154 of the Treaty on the Functioning of the European Union, and to suggest pathways and tools for the modernisation of the industry, mostly composed of SMEs. The project fully complies with the goals of objectives of the social partners' Work Programme for the Sectoral European Social Dialogue of the Woodworking Industries 2022-2023 and 2024-2025.

Anticipation and adaptation to economic, technological and social changes is crucial for the European woodworking industry, a pillar of the forest-based bioeconomy, to remain a key contributor to the environmental objectives of the Green Deal, and notably the transition to a climate neutral and circular bioeconomy.

Dialogue between social partners and with education providers is key to retain skills and attract new ones and, when building the RESILIENTWOOD consortium, the European woodworking social partners have tried to do exactly that.

### **Objectives**

The project runs for 27 months and aims to achieve the following objectives within the given timeframe:

1. Provide social partners with an overview of the latest developments of the woodworking sector in Europe, including the economic impact of the Covid-19 pandemic, as well as expected technological and organisational changes within woodworking companies in five countries (Sweden, Belgium, Italy, France and Croatia) and in the European sawmill sector.
2. Stimulate the joint social partners' discussion on four specific challenges and issues through dedicated workshops:
  - The adaptation of the industry and outlook after the Covid-19 pandemic and crisis.
  - Gender equality in the woodworking industry.
  - Expected technological changes in the industry and adaptation needs.
  - Increasing the attractiveness of the sector through mobility.





3. Develop recommendations and guidelines for companies, VET and public authorities to overcome the above-mentioned challenges, to be presented in the final report and final conference of the project.
4. Disseminate results within and outside the membership base of the European social partners of the woodworking sector.

### Partners

The RESILIENTWOOD project builds on a strong transnational dimension, with 8 partners involved, from 5 different countries and 3 European organisations. The consortium is composed of:

- **1 coordinator:** the European Confederation of Woodworking Industries (CEI-Bois) represents 21 European and national organisations from 16 countries and is the body backing the interests of the whole industrial European wood sector: more than 180.000 companies, generating an annual turnover of 152 billion euros and employing 1 million workers in the EU.
- **3 partners,** involved in the project management:
  - The European Federation of Building and Woodworkers (EFBWW) is a European trade Union Federation with members in the Building, Building Materials, Wood, Furniture, Forestry and allied sectors. The EFBWW represents blue- and white-collar workers from 76 national trade unions in 34 countries.
  - The Forêt, Cellulose, Bois-construction, Ameublement (FCBA) technology institute, whose mission is to promote technical progress, to participate in the improvement of yield and to guarantee quality in the industry. Its field of action covers the entire forestry, wood and furniture sectors. As a privileged partner of companies, FCBA is attentive to their technical and economic environment, to help them integrate technological innovations and adapt to the rapid evolution of markets.
  - WOODWIZE is the paritary sectoral organisation for wood and furniture sector in Belgium. It boasts a thorough knowledge of the Belgian timber and woodworking sector and takes great care in transmitting to employers and workers, teachers and students! Training courses, information sessions and professional services help to make the sector both sustainable and safe.
- **4 affiliated entities:**

For CEI-Bois, these are:

- The European Organisation of the Sawmill Industry (EOS) consists of national sawmilling federations and associated members from 11 European countries, representing 80% of the European sawnwood production.
- The Croatian Wood Cluster (Hrvatski Drvni Klaster, CWC) is the oldest industrial cluster in Croatia, established in 2003. The CWC acts on the national level as a triple-helix organisation, and counts about 60 members from all sectors in the forest-based value chain. Its main objectives are to enhance the sustainability and competitiveness of the sector by encouraging innovation, investments, research, knowledge and technology transfer.

For EFBWW, these are:

- ❑ Federazione Italiana Lavoratori Costruzioni e Affini (FILCA-CISL) is the Italian sectoral union representing construction, wood, cement, brick, marble and stone workers. It is affiliated to CISL (Italian Confederation of the Workers' Unions) and represents around 243.000 workers in all provinces of Italy.
- ❑ The Swedish Union of Forestry, wood and graphical workers (Facket för skogs-trä- och grafisk bransch, GS) was established in 2009 and organises workers in the forestry, woodworking and graphic industries in Sweden.

### Workshops

During the course of 2024, social partners and training providers had the opportunity to meet at various occasions, a.o. during thematic workshops and company visits to engage in numerous exchanges with experts. Drawing on these experiences and testimonials, they have put forward a series of recommendations designed to anticipate changes, increase attractiveness, build skills and inclusiveness in the European woodworking industries.

#### ■ Workshop on “Expected technological changes in the industry and adaptation needs”

On 15 and 16 January, the partners involved in the project met in France for two days. On the first day, they had the chance to visit the Piveteau-bois company in the outer suburbs of Nantes. It was an opportunity to find out first-hand about the technologies that will shape the future of the wood industry, and to provide an opportunity to reflect on the appropriate way to develop the corresponding skills and training.



On the second day, the programme continued with the actual workshop at the Ecole Supérieure du Bois in Nantes, a leading institution of higher education and research in wood sciences and technologies. Partners continued their investigation on how the woodworking industries will need to adapt to the expected technological changes. They were able to hear from experts on a range of subjects, a.o. the actual and future perspectives of the European sawmill sector, technological developments and projects in terms of traceability and scanning and the Forest-based Sector Technology Platform (FTP) and its topic prioritization process. Moreover, participants had the opportunity to discover the ESB's infrastructure: workshop, laboratories, auditorium, materials library, etc.

■ **Workshop on “Adaptation of the industry and outlook after the Covid19 pandemic and crisis”**

The partners met in Sweden on 1 February for a day featuring both a theoretical approach, with contributions from various experts, as well as a practical dimension, with a visit of the Derome factory. Dating back to 1946, Derome is one of Sweden's



largest family-owned wood industries. With wood as a “green thread”, the company works with wood from the forest to the production of timber houses (sawmilling, planning, house production & development, wood technology, impregnation, material supply, machine rental, etc.). Derome's strategy rests on a long-term vision, which is reflected in their relations with the workforce, investments and in business culture. The company aims at being at the forefront of innovation and technical equipment.

Expert presentations and examples of good practices provided Social Partners with an overview of the latest challenges of adapting the industry after the Covid-19 pandemic and led to interesting and enriching discussions.

■ **Workshop on “Gender equality in the woodworking industry: analysis of the status quo and possible actions”**

The partners gathered online on 27 March to hear some practical examples from Italy of actions undertaken to strive for gender equality, to discover the testimony of what gender equality means from a company perspective, to embrace a broader view on the topic of non-discrimination and inclusion and to learn about the obstacles women face in construction, woodworking and forest industries and what solutions are needed to increase recruitment and retention.

■ **Workshop on “Increasing the attractiveness of the sector through education: student mobility and the role of an ‘Erasmus for apprenticeships’”**

The partners met in Brussels on 16 April to discuss how to attract the young generation in the timber industries, what interests the young generation, how social media can deliver the messages of the wood industries to the future workers generations, what are the mobility possibilities offered by the Erasmus+ programme and what is done in Belgium to adapt education to companies' needs, to upskill teachers and to promote careers in the woodworking industries?

**Final conference**

On 4 September, the project partners held their final conference. Over fifty participants travelled to Brussels to attend the event and learn more about innovation, inclusion, mobility for apprentices and attracting young people to the wood industry. The attendees also had the opportunity to discover the results of the project's final study, as well as the partners' policy recommendations.

For this final event, the RESILIENTWOOD project partners wanted to look back at the various themes addressed during the project through the testimonies of:

- Anna Barbieri (European Commission Directorate-General for Employment, Social Affairs and Inclusion), who presented the EU Alliance for Apprenticeships as well as the mobility possibilities for apprentices offered by the Erasmus+ programme, as apprenticeships can bring a response to labour and skills shortages.
- Melanie Kaindl & Gennaro Azzollini (Microtec), who gave a sneak peek at sawmill of the future. A good example of how companies that are often perceived as old fashioned are actually (very) modern and resolutely future oriented.
- Simona Corrado (Filca-Cisl), who explained how to build a more inclusive workplace and gave examples of policies already in place in Europe and Italy.
- Maarten Leyts (Trendwolves), who looked at what influences the young generation and the role the social media can play in delivering the messages of the wood industries to the future workers generations.

### Final Study

The final study of the project provides an overview of the latest developments in the woodworking industries in Europe. It proves a useful tool to stimulate social partners' discussions on the challenges of adapting the industry after the Covid-19 pandemic and contains a series of chapters focussing on the adaptation and prospects in times of crisis, the women representation in the industry, the expected technological changes and adaptation needs as well as the role of VET and student mobility in Belgium, Italy, Sweden, France and Croatia. A separate chapter also deals with those topics for the European sawmill sector at large.



### Recommendations and guidelines

A series of recommendations and guidelines designed to anticipate changes, increase attractiveness, build skills and inclusiveness in the European woodworking industries forms the final element of this two-year project.

The woodworking industry is increasingly recognising the importance of a diverse workforce. While there is room to further increase the share of underrepresented groups among the woodworking industries workforce, efforts to include more women and individuals from various backgrounds are helping to address labour shortages and bring new perspectives to the industry. Inclusiveness in the industry is supported by initiatives to provide permanent training and education, ensuring that everyone has access to opportunities in woodworking, from entry-level positions to leadership roles.

### 4.6.3 Val Duchesse declaration and Conference of La Hulpe

On 31 January 2024, the European Commission, the Belgian Presidency and European social partners signed the Val Duchesse declaration, reaffirming the role of social dia-

logue in the EU. This declaration contained the commitment to launch an Action Plan to address labour and skill shortages in the Spring this year.

A consultation has been organised by the EC to gather the views of European social partners. Written contributions have been submitted by CEI-Bois, which will continue to monitor this process over the coming months.

On 15 and 16 April, a High-Level Conference on the European Pillar of Social Rights was organised by the Belgian presidency of the EU in La Hulpe, Belgium.

This Conference brought together policymakers, stakeholders and experts, who have renewed their commitment to the European Social Model to continue making social and economic progress, combining increased competitiveness and productivity with equal opportunities, promoting more quality jobs and fair working conditions, reducing poverty and inequalities and delivering a fair transition to climate neutrality.

At the end of the conference, the “Declaration on the Future of the European Pillar of Social Rights” was signed by the European Commission, the Belgian Presidency of the Council of the EU on behalf of 25 EU Member States, the European Parliament, the European Economic and Social Committee, the majority of European social partners, and civil society.

The declaration

- Welcomes the plan to review the European Pillar of Social Rights Action Plan in 2025. This will also serve as a basis for further actions to achieve the 2030 EU and national headline targets for employment, skills and poverty reduction.
- Refers to the need to empower social partners and collective bargaining.
- Acknowledges the role of civil society, in particular when it comes to fighting social exclusion and inequalities.
- Highlights the relevance of equal opportunities and access to the labour market, fair working conditions, and social protection and inclusion.
- When it comes to governance, underlines the role of the Pillar across economic and social policy areas as well as the importance of social investment, distributional impact assessment and upward social convergence.

#### 4.6.4 European Year of Skills

The 2023 European Year of Skills, announced by President von der Leyen in her State of the European Union Address on 14 September 2022, represents a unique opportunity to support European companies, and especially small and medium-sized enterprises, “*grappling with a shortage of staff*” by putting “*more focus in our investment on professional education and upskilling*”, by ensuring “*better cooperation with companies*”, by matching companies’ needs “*with people’s aspirations*” of both low and high skilled, and by speeding up and facilitating the “*recognition of qualifications also of third country nationals*”.



The European social partners from the woodworking and furniture industries, represented by CEI-Bois and EFIC, jointly with their European trade union representatives, EFBWW, welcomed the Commission decision to declare the year 2023 as “European Year of Skills”.

### Closing event

In May 2024, CEI-Bois took an active part during the closing event by co-moderating a discussion group on “Making skills intelligence better and using it in a smarter way”.

The discussion emphasised the need for a robust methodology to accurately forecast future skills requirements, ensuring alignment between job seekers’ skills and employers’ needs. Forecasting skills needs remains a challenging task, especially given employers’ difficulties in anticipating future skill requirements. However, integrating employer insights in forecasting methodologies, such as those provided by Public Employment Services, can help gain a more comprehensive understanding of future skills needs and proactive measures to address future skill gaps.

Understanding evolving skills contexts and fostering effective coordination among stakeholders to adapt to rapid changes in skill demands emerged in the discussion in relation to Vocational Education and Training (VET). Low data precision is a challenge, but collaborative regional efforts can offer an effective strategy to improve skills intelligence – for example with joint action plans and targeted dissemination of skills intelligence insights. The example of a Sectoral Expert Council also emerged as a good practice model of stakeholder-driven approaches in skills development.

## 4.6.5 Position paper addressing skills needs in the woodworking and furniture sectors

As Social Partners and in the context of the EU Year of Skills, CEI-Bois, together with EFBWW and EFIC, co-signed a position paper entitled “An impetus for high quality training, up to date curricula, an improved attractiveness of the woodworking and furniture sectors and a more ambitious Erasmus+ for apprentices.”

Recommendations were addressed at EU level, at national and government level, as well as at company level and by training providers. These recommendations include:

- developing strategies to attract more young people in the woodworking and furniture sectors,
- supporting companies for skilling and upskilling, to ensure that their employees have the necessary skills to meet evolving industry demands,
- promoting and supporting VET considering differences in the Member States,
- eliminating barriers for the mutual recognition of qualifications,
- putting in place a system to validate formal and non-formal learning in cooperation with social partners and trade/industry associations,



- developing long term training plans,
- creating networks for an increased use of Erasmus+.

#### **4.6.6 Commission first-stage consultation on fair telework and the right to disconnect**

On 30 April, the European Commission published the first-stage consultation of European social partners to gather their views on the possible direction of EU action on ensuring fair telework and the right to disconnect. This consultation follows the European Parliament's 2021 resolution calling for a proposal to address these issues. In line with President von der Leyen's Political Guidelines as regards resolutions adopted by the European Parliament under Article 225 of the Treaty on the Functioning of the European Union (TFEU), the Commission is committed to respond with a legislative proposal in full respect of proportionality, subsidiarity and better law-making principles.

In the meantime, European cross-industry social partners launched negotiations to update their 2002 Framework Agreement on telework, supported by the Commission. Following their inconclusive negotiations, they asked the issue to be addressed by the Commission. This is why the Commission has launched the formal consultation of the EU social partners, as per the rules and procedure for social policy legislation.

CEI-Bois sent responses and some additional comments to the questions set out in the EC consultation, a.o. stressing that:

- The European Commission had correctly and sufficiently identified opportunities and challenges regarding telework and the right to disconnect are adequately identified.
- No further EU action is needed. Should EU legal action be nevertheless considered necessary, the measures are best achieved by setting out recommendations or clarifications of the existing legislation. No new legislation should be introduced. Moreover, redundant and overly detailed regulation may even establish conditions under which the now fully functional regulatory framework, workplace practices and culture, and legal precedents are jeopardized.
- Appropriate solutions should primarily be found in national collective agreements and national legislation. And any and all EU action needs to respect the social partners' right to conclude collective agreements and adapt, complement and differ from legislation through collective agreements.
- A number of potential areas (e.g. right to disconnect, ensuring decent employment and working conditions for teleworkers, etc.) are already regulated in national legislations.
- Telework must be voluntary, for both the employer and employee, and the prerogative to make the final decision regarding telework must lie with the employer.
- Regarding telework, the social partners have agreed to a framework agreement on EU cross-sectoral level. The Commission should not override that framework agreement with legislation.
- As to the right to disconnect, there is no need for binding legislation since the Working Time Directive already does not allow constant work and an always available approach. In addition, its enforcement should be strengthened to emphasise the intension of the existing directive.

- Employees carrying out remote work are either fully or partly already covered by high regulatory national standards, and issues set out in the Consultation can be addressed through the current national instruments.
- Promoting social partners should include a respect for collective agreements concluded by social partners. In order to truly promote social partners, any potential action should include the clause, which in the negotiations between the European cross sectoral social partners, was agreed and entailed that “Member States may, on the condition that the national social partners jointly agree, give the social partners, at the appropriate level and subject to the conditions laid down by Member States, the option of upholding or concluding collective agreements which adapt, complement and/or differ from the rules included in this Agreement provided that the general level of protection of workers is ensured.”

#### 4.6.7 European Employers Network

CEI-Bois is a member of the European Employers Network (EEN) since re-joining in 2021. The EEN is a voluntary forum/network where all events are coordinated by Business Europe. It provides a forum in which exchanges of views and information on social policy can take place between European employers’ organisations in a timely manner and promote the convergence of views and positions on social policy expressed by European employers’ organisations on behalf of their affiliates, in order to enhance their ability to make strong representations to the EU Institutions, European Trade Unions and other relevant European stakeholders.

In October, CEI-Bois provided data on employment participation by gender in the wood-working industries, examples of actions taken to address gender segregation, and best practices input to the EEN’s “Post-2025 Gender Equality Strategy Paper”.

This paper is developed in the context of the European Commission’s Gender Equality Strategy (GES) 2020-2025, which outlines the policy objectives and key actions aimed at achieving a gender-equal Europe. Its focus is to address gender-based violence, eliminate sex discrimination, and reduce structural inequalities between men and women. As the current strategy approaches its conclusion, preparations are underway to formulate a new strategy. In line with its approach to the 2020-2025 GES, BusinessEurope is drafting a policy paper to define its priorities for gender equality.

### 4.7 Trade

The CEI-Bois Trade working group deals mainly with two sets of activities:

- markets discussions aiming at taking stock of the situation and comparing trends across Europe and beyond,
- trade relations with countries outside Europe including challenges and opportunities.

Below, the main issues dealt with by the Trade working group during the year 2023/2024 are described, with the exception of the EU Deforestation Regulation, which is dealt in another dedicated section.



## 4.7.1 Possible Japanese ban on the imports of Russian wood products

At the beginning of March 2024, CEI-Bois and EOS jointly took the initiative of asking DG Trade to raise with their Japanese counterparts the possibility of banning imports of Russian sawnwood, which still makes up a quite significant share of Japanese imports of sawnwood.



Brussels, March 12<sup>th</sup>, 2024

To: the Executive Vice-President of the European Commission and Commissioner for Trade, Mr Valdis Dombrovskis  
Cc: DG TRADE Officers responsible for Japan, Delegation of the European Union to Japan, Permanent Representations Trade Attachés

### **EOS and CEI-Bois Statement: Possible Japanese Imports Ban on Russian Wood Products**

Dear Commissioner Dombrovskis,

With this statement the European Organisation of the Sawmill Industry (EOS) and the European Confederation of Woodworking Industries (CEI-Bois) would like to encourage you in your discussions with your Japanese counterparts to raise the question of a possible Japanese ban on the imports of Russian wood products, in particular lumber and glue laminated timber.

According to figures shared by the Japanese Lumber Importers Association, Japan in 2023 was still importing 13% of its total lumber imports from Russia. This is regrettable as Russia is a major global power in the woodworking industry and Japan is an important market for many Russian exporters.

We believe that a concerted effort to persuade Japan to stop importing Russian lumber would be a significant step in further impacting the Russian economy and its war machine. Our trade posture towards Russia, and sanctions in particular, should be coordinated and coherent among the coalition of countries that have decided to punish Russia's unprovoked, unjustified, and barbaric invasion of Ukraine.

Up until 2021 the European Union imported significant quantities of wood products from Russia (and Belarus), much more than what Japan is currently importing, even in proportion to the larger EU population and economy. As an industry and a society, we should be proud that in the space of some months we were able to give up importing Russian wood products, swiftly readjusting and adapting to the new reality.

We have thus shown that this is feasible, and we believe that Japan should join Europe in banning imports of wood products originating from Russia.

We would be grateful if you could help us achieve that.

We remain available for any clarification you might need.

Sincerely,

*Herbert Jöbstl, EOS President*

*Sampsa J. Auvinen, CEI-Bois President*

CEI-Bois – The European Confederation of Woodworking Industries - Transparency register n° 470333316389-37  
EOS - European Organisation of the Sawmill Industry - Transparency register n° 024775016336-52



In the meantime, Commissioner Dombrovskis has officially answered, with the most relevant part of his letter being:

*"Nevertheless, each jurisdiction is sovereign in its decision to adopt autonomous sanctions within its national legal system, and to date Japan has not enacted a full import ban on wood products such as the one in force in the EU . In our constant dialogue with the G7, we continue to remind our partners that it is important to close any loopholes that different sets of restrictive measures may inadvertently cause."*

#### **4.7.2 Statement regarding the Red Sea Crisis**

Over the last few months, due to the tensions in the Red Sea with the attacks of the Yemen-based Houthi rebels on international shipping routes, a lot of cargo ships are delayed and cancelled and costs have gone up significantly.

This is having an impact also on the woodworking industries and trade, in particular with businesses active in Asia.

That is why EOS, CEI-Bois and ETTF have decided to join forces and produce a statement to bring to the attention of the European Commission our concern at what is happening in the Red Sea.

The statement was sent to the European Commission in January and it is reported below.



Brussels, 15 January 2024

To the Executive Vice-President, Mr Valdis Dombrovskis,

To the Internal Market, Industry, Entrepreneurship and SMEs Commissioner, Mr Thierry Breton

Cc: DG GROW, Deputy Director-General, Mrs Maive Rute

**Statement of the European Woodworking Industries and the Timber Trade: Red Sea crisis escalation jeopardizes trade with Asia and Africa**

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The Red Sea route is a pivotal maritime route for global trade, including for the European woodworking industries and the timber importers. The escalating crisis in the Red Sea has profoundly negative implications for the European economy, not least for the European wood sector. At a time of subdued demand for wood products across Europe, swift and unimpeded access to Asian and African countries is vital to keep our businesses afloat. As a result of the crisis, our companies are confronted with many issues that are making extremely challenging the sourcing and supplying of our products from and to Asian and African markets. Some of our challenges are listed below:

- Higher costs for insuring vessels transiting the Red Sea
- Partly as a consequence, shipping companies are introducing extremely high surcharges
- Very high uncertainty and price volatility
- Cargo-delays and cancellations
- Extended transit time, lack of information about delivery time

The European Wood industries and the trading sector demand that urgent action be undertaken by the European institutions and relevant partners to ensure that safety and stability in the Red Sea is restored. Targeting cargo ships is unacceptable and should be suppressed - not least to ensure that firing rockets at cargo vessels is not an inspiration for other terrorist groups.

For both imports and exports, the overseas markets especially in Asia are crucially important and, together with trade routes to east-African ports, the Red Sea route is by far the most important connection and needs to be safeguarded.

CEI-Bois – The European Confederation of Woodworking Industries - Transparency register n° 470333818389-37  
EOS - European Organisation of the Sawmill industry - Transparency register n° 024776016336-52  
ETTF - European Timber Trade Federation - Transparency register n° 151485550468-20

### 4.7.3 Russian imports of birch plywood

Prior to Russia's invasion of Ukraine in February 2022, the global birch plywood production landscape was dominated by Russia, Belarus, and Ukraine, collectively accounting for approximately 80% of the world's birch plywood output. In the year 2021, Russia alone exported roughly 1.3 million cubic meters of birch plywood to Europe and an additional 0.6 million cubic meters to North America.

However, the situation took a significant turn with the implementation of the fifth round of sanctions against Russia by the European Union in July 2022. These sanctions effectively prohibited the importation of roundwood and wood products, including birch plywood, from Russia into the EU. Nonetheless, it has come to light, through market data and statistics, that illegal Russian birch plywood continues to find its way into Europe via third-party nations.

This illicit birch plywood influx is evident in the heightened importation of birch plywood from countries like Kazakhstan and Turkey. When examining Kazakhstan's production capacity, it becomes evident that the nation lacks the means to legitimately supply the volumes indicated in the statistics.

The illegal importation of Russian birch plywood utilizes various methods to circumvent the EU import ban. One tactic involves routing the plywood through a third country to evade the ban effectively. Furthermore, some third-party countries may make superficial alterations to the plywood, subsequently claiming the altered country as the product's place of origin. Another stratagem entails manipulating the tariff classification to exempt the product from sanctions.

The unlawful import of Russian birch plywood not only contravenes EU sanctions and the anti-dumping duties imposed on birch plywood imports in 2021 but also violates the EU Timber Regulation and the protocols of international certification organizations. This is particularly relevant if attempts are made to market birch plywood as a certified product.

The evasion of sanctions and the introduction of illegal birch plywood into the market inflict substantial damage upon the European plywood industry and other lawful entities in the value chain. Such illicit products, being cheaper, undermine fair competition, placing European producers at a disadvantage. This comes at a time when these producers are already grappling with elevated energy costs and resource scarcities due to a prior export ban imposed by Russia on birch logs and veneer.

The European woodworking industry stands behind the EU sanction regimes and in support of enforcement, stopping of illegal imports and preventing unfair competition throughout the entire value chain.

Within the framework of its Trade WG, CEI-Bois shares the latest information and developments on the sanction regimes, in full compliance with the existing competition law and rules. CEI-Bois does its best to inform and alert its members on possible

sanction circumvention methods that could be used and strongly encourages its members to contact their national competent authorities in the case, where they or their member companies receive any dubious offers.

Following a number of alerts, on 22 August 2023, the EU Commission has ordered the opening of an investigation into suspected imports of birch plywood originating in Russia by imports consigned from Turkey and Kazakhstan. All imports of Birch Plywood crossing the EU border and having a declared country of origin of either Turkey or Kazakhstan will require additional registration as part of the customs declaration process. In May 2024 the Commission has officially extended anti-dumping measures on imports of birch plywood from Russia to imports from Kazakhstan and Turkey. The extension follows an investigation which concluded that EU anti-dumping duties on imports of birch plywood from Russia were being circumvented by imports transhipped from Russia to Kazakhstan and Turkey, or sent for final completion to these countries, preceding shipment of the finished product to the EU.

The extension of anti-dumping duties to Kazakhstan and Turkey is necessary to protect EU producers from unfair competition and to enforce trade defence measures in place since November 2021. It concerns imports suspected to be of Russian origin, but with declared Turkish or Kazakh origin.

#### 4.7.4 Japanese Agricultural Standard review

The Japanese Agricultural Standard JAS 0600 standard will be under the regular quinquennial review in 2025. JAS standards are reviewed every 5 years as a legal requirement under the JAS law. According to this, the European



industry is requested to collect and submit to Ministry of Agriculture, Forestry and Fisheries of Japan (MAFF) the strength data for European Norway spruce.

EOS is the convener of a Working Group which is tackling the issue of the Japanese Agricultural Standard 600 review. The European industry is requested to collect and submit to Japan the strength data for European spruce to still be JAS certified.

By June we had to submit some existing data (Step 1 of the project), analyzed by Pacific Lumber Inspector Bureau.

Currently, we are in step 2, which consists of testing samples of Norway Spruce of standard dimensions and grades tailored to JAS600 specificities. The testing is carried out by institutes HFA, HFM, and RISE, with PLIB being responsible for data analysis and the preparation of the report. The final report for dimension 2x4 is scheduled for submission to MAFF by the end of 2024, the report for the bigger dimensions 2x6 and 2x10 will follow in the first quarter of 2025.

#### **4.7.5 Anti-dumping proceeding concerning imports of multilayered wood flooring originating in China**

In May 2024, the European Commission has initiated an anti-dumping proceeding concerning imports of multilayered wood flooring originating in China.

According to the notice, the complainant has provided sufficient evidence that there may be raw material distortions, including logs, in the country concerned regarding the product under investigation. The investigation will determine whether the product under investigation originating in China is being dumped and whether the dumped imports, have caused injury to the Union industry. In that case, the investigation will examine whether the imposition of measures could be in the Union interest.

the Commission has published an Implementing Regulation making the imports of Chinese multilayered wood flooring from China subject to registration by the customs authorities. The product concerned is currently classified under CN code 4418 75 00.

Imports of the product concerned may be made subject to registration for the purpose of ensuring that, if the investigation results in findings leading to the imposition of anti-dumping duties, those duties can, if the necessary conditions are fulfilled, be levied retroactively on the registered imports in accordance with the applicable legal provisions.

In the complaint requesting the initiation of an anti-dumping investigation, dumping margins for the product concerned were estimated to range from 60% to 160% and an average injury elimination level was estimated to range between 40% and 50% in the period from October 2022 to September 2023.

A decision on the imposition of duties is expected around December 2024.

#### **4.7.6 Anti-dumping investigation into Chinese plywood imports**

In October 2024 the EU has launched an anti-dumping investigation into Chinese hard-wood plywood imports. Specifically, the product subject to this investigation is plywood consisting solely of sheets of wood other than bamboo and okoumé, each ply not exceeding 6 mm thickness, with at least one outer ply of tropical wood or non-coniferous wood, of species specified under subheadings 4412 31, 4412 33 and 4412 34, whether or not coated or surface-covered.

The complaint was lodged on 27 August 2024 by the Greenwood Consortium ('the complainant'). The evidence provided by the complainant shows that the volume and the prices of the imported product under investigation have had, among other consequences, a negative impact on the quantities sold and the level of prices charged by the Union industry, resulting in substantial adverse effects on the overall performance and the financial situation of the Union industry.

The investigation of dumping and injury will cover the period from 1 July 2023 to 30 June 2024. The examination of trends relevant for the assessment of injury will cover the period from 1 January 2021 to the end of the investigation period.

The investigation will be concluded but not more than 14 months of the date of the publication of this Notice. All imports of Chinese goods will have to be registered at EU borders. If the EU decides to levy tariffs, they would then be applied retroactively.

There has been a surge in cheap hardwood plywood coming from China, much of which it is believed to originate from Russia.

According to the Financial Times, the probe follows the EU's imposition of tariffs of up to 45 per cent on Chinese electric vehicles last week. China responded to that with provisional tariffs on EU brandy exports and had already opened anti-dumping probes into pork and dairy products.

The move has sparked fears by EU member states of an extended cycle of retaliatory moves on important products, while China argues the EU is being protectionist. As tensions heighten, the two sides have also filed multiple challenges to the other's trade defence measures at the World Trade Organization.

The EU imported about 750.000 cubic metres of hardwood plywood from China worth €327 million in 2023, according to Eurostat figures.

That accounted for more than half of the bloc's imports and 30 per cent of the total EU market.

## 4.8 Research, Development and Innovation

The Forest-based Sector Technology Platform (FTP) is a European Technology Platform (ETP) dedicated to the forest-based sector.



FTP mobilises a broad range of EU-wide actors and developed and disseminated joint visions and strategic R&I agenda for action at EU and national level.

One of the main benefits of FTP is its ability to provide wide, objective, coherent and strategic R&I advice that replaces reliance on multiple, often competing and contradictory, interactions.

In this way, FTP delivers sound, scientific, strategic and EU-relevant information to public funding providers, thus facilitating opportunities for targeted investments in research, technological developments and innovation (RTDI).

FTP was founded in 2005 by four forest-based sector associations: CEI-Bois, CEPI, CEPF and EUSTAFOR.

### 4.8.1 FTP Database

The FTP database is a comprehensive open-source data infrastructure that compiles ongoing and concluded research and innovation activities carried out within the European forest-based sector, as well as providing details of relevant funding opportunities.

Recently updated, with a more user-friendly interface, it was designed to support the implementation of FTP's Strategic Research and Innovation Agenda. The database collects information on forest-based sector-related research and innovation projects, calls for proposals, research consortia, funding agencies as well as publications and patents. Embodied with a powerful search engine and multiple filters, the tool makes it possible to consult the details of a single project, create customised searches and save reports that provide strategic information about progress within the sector in addressing its RTD&I priorities.

### 4.8.2 In the spotlight

#### EU Funding to R&I in the woodworking industries

According to the latest FTP statistics, the EU Research Funding contributed with €60 million to the woodworking industries in 2023.

The funding is offered to collaborative projects such as CISUFLO (circular, sustainable floor coverings) and Bio4EEB (Bio insulation materials for enhancing the energy performance of buildings). These projects have been financed under schemes to which FTP has provided advice and input.

#### New European Bauhaus Facility doubles budget

The New European Bauhaus (NEB) is an initiative for a green transition of the European building environment. Part of this is supposed to be accomplished through research & innovation. In 2025, the budget for this part of the initiative is to be doubled to 160M€ and in preparation of this, FTP provided input to the EC consultation on how the R&I needs should be defined.



#### Preparations for a European Partnership on Forests and Forestry

The European Commission, together with several national research funding agencies, are preparing for the setting up of a €300 million Partnership related to the forest-based sector. The Partnership is supposed to be established in 2025, with a start of funding activities in early 2026. The focus will be on forests and forestry, but also forest-based products will be part of the scope. In the preparation process, FTP is representing the industry stakeholders.

It is hoped that through the involvement of FTP, the initiative will be more attentive to the needs of the woodworking industry.





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# 5. CEI-Bois members



Blue – Direct representation through CEI-Bois National Federation Members

Green – Indirect representation through CEI-Bois' European Sector Organisation Members

***The next new CEI-Bois member might be you!***

*Get in contact with the CEI-Bois Secretariat  
to learn more about our Confederation  
and how to become a Member!*

## 5.1 National Organisations

### AUSTRIA

Fachverband der Holzindustrie Österreichs  
[www.holzindustrie.at](http://www.holzindustrie.at)

### BELGIUM

Fédération Belge de l'Industrie Textile,  
du Bois et de l'Ameublement  
[www.fedustria.be](http://www.fedustria.be)

### CROATIA

Croatian Wood Cluster  
[www.drwniklaster.hr](http://www.drwniklaster.hr)

### DANEMARK

Traeets Arbejdsgiverforening - Dansk  
Industri  
[www.di.dk](http://www.di.dk)

### ESTONIA

Estonian Forest and Wood Industries  
Association  
[www.empl.ee](http://www.empl.ee)

### FINLAND

Finnish Forest Industries Federation  
[www.forestindustries.fi](http://www.forestindustries.fi)

Federation of the Finnish Woodworking  
Industries  
[www.puutuoteteollisuus.fi](http://www.puutuoteteollisuus.fi)

### GERMANY

Der Hauptverband der deutschen  
Holzindustrie  
[www.holzindustrie.de](http://www.holzindustrie.de)

### ITALY

Assolegno di Federkegnoarredo  
[www.federlegnoarredo.it](http://www.federlegnoarredo.it)

### LATVIA

Latvian Forest Industries Federation  
[www.lvkokslv](http://www.lvkokslv)

### NORWAY

Norwegian Wood Industry Federation  
[www.treindustrien.no](http://www.treindustrien.no)

### SLOVENIA

Sloles – Slovenian Wood Association  
[www.sloles.eu](http://www.sloles.eu)

### SWEDEN

Swedish Forest Industries Federation  
[www.forestindustries.se](http://www.forestindustries.se)

Swedish Federation of Wood and  
Furniture Industry  
[www.tmf.se](http://www.tmf.se)

### SWITZERLAND

Holzwirtschaft Schweiz  
[www.lignum.ch](http://www.lignum.ch)

### THE NETHERLANDS

Nederlandse Bond van Timmerfabrikanten  
[www.nbvt.nl](http://www.nbvt.nl)

### UNITED KINGDOM

Timber Development UK  
[www.timberdevelopment.uk](http://www.timberdevelopment.uk)

### LITHUANIA

Medienos perdirbimo asociacija  
[www.mpaa.lt](http://www.mpaa.lt)

## 5.2 European Sector Organisations:

European Institute for Wood Preservation  
[www.wei-ieo.org](http://www.wei-ieo.org)

European Federation of Wooden Pallet and  
Packaging Manufacturers  
[www.fefpeb.org](http://www.fefpeb.org)

European Timber Trade Federation  
[www.ettf.info](http://www.ettf.info)

European Organisation of the Sawmill  
Industry  
[www.eos-oes.eu](http://www.eos-oes.eu)



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An aerial photograph of a dense, vibrant green forest. The image is overlaid with several large, semi-transparent geometric shapes: a grey diamond, a teal diamond, and a teal chevron pointing downwards. A large white number '6' is positioned in the bottom-left corner, partially overlapping the teal chevron.

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# 6. CEI-Bois Team

## 6.1 Board of Directors

- CEI-Bois President: Sampsa Auvinen (Board Professional, Latvia)
- Michael Pfeifer (FV Holzindustrie, Austria)
- Filip De Jaeger (Fedustria, Belgium)
- Stephen King (TDUK, United Kingdom), on behalf of Keith Fryer
- Rob van Hoesel (FEFPEB, The Netherlands)
- Denny Ohnesorge (HDH, Germany)
- Antti Koulumies (FFIF & FWIF, Finland)
- Mathias Fridholm (Skogindustrierna & TMF, Sweden)
- Ana Dijan (Croatian Wood Cluster, Croatia)

## 6.2 Secretariat

- Secretary General: Silvia Melegari
- Director of Public Affairs: Paul Brannen
- Head of Communications and Social Affairs: François Sougnez
- Policy Officer: Claudiu-Nicolae Sonda
- Technical Advisor: Andrew Norton

## 6.3 Working Group Chairs

- Construction Working Group: Dieter Lechner (FV Holzindustrie, Austria)
- Sustainability Working Group: Ingrid Hontis (Fedustria, Belgium)
- Social Affairs Working Group: Charlotta Steinwall (Industriarbetsgivarna, Sweden)
- Trade Working Group: Stephen King (Timber Development, UK)
- Research, Development and Innovation Working Group: Johan Elvnert (FTP, Belgium)

## CEI-Bois Accountant

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