

Evolución del mercado colombiano de los productos manufacturados por la industria de la transformación de la madera (Finales del siglo XIX - 2021)

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Evolution of Colombia's market for manufactured products of the wood industry

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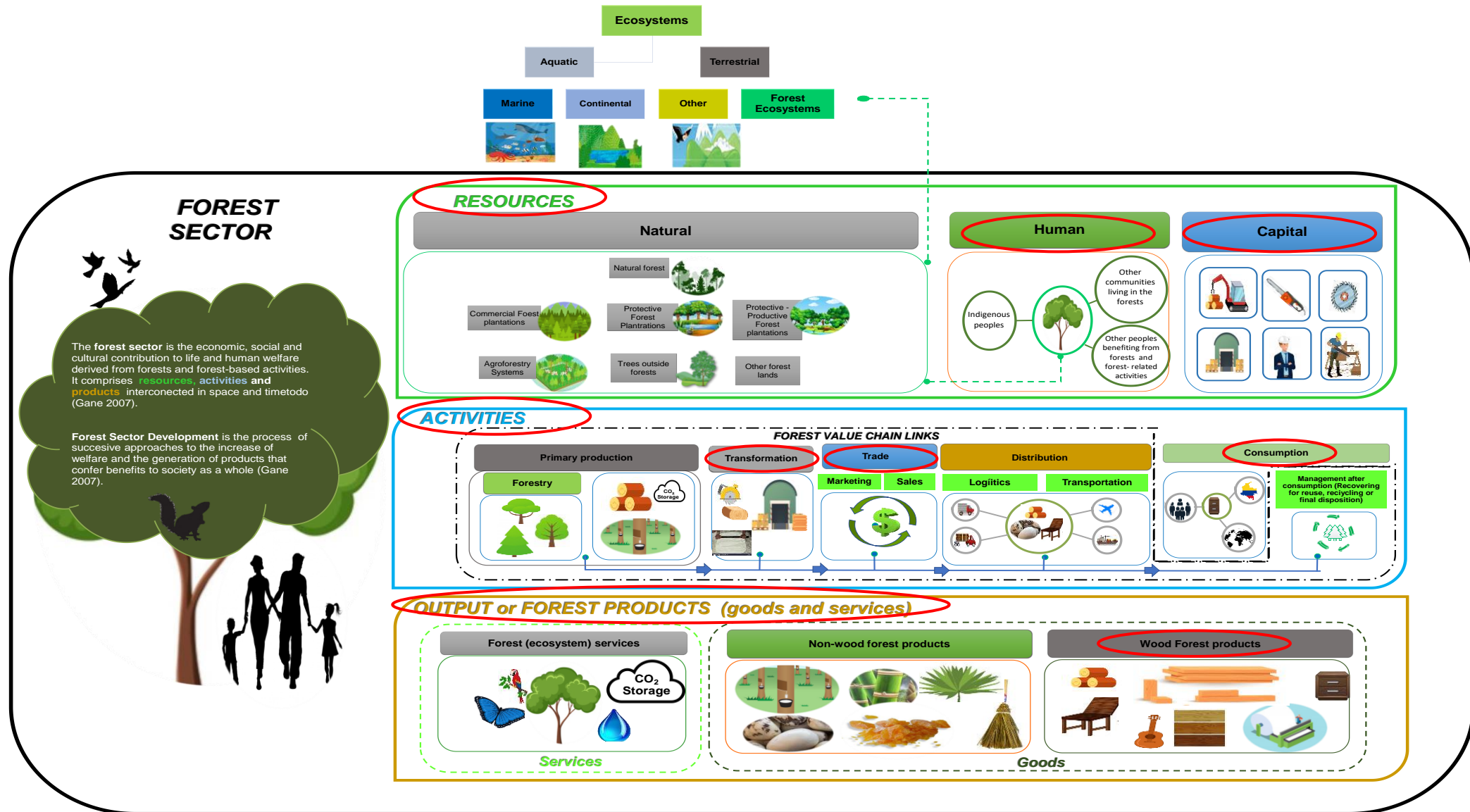
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The Forest Sector Concept



Landscape of the Wood Forest Product (WFP) Market in 2020

General division of products/markets included in the WFP market	Group of products/individual markets according to the National Accounts of Colombia	Consumption		Exports		National Production		Imports	
		Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)
Unprocessed wood, UW (aka raw wood) (rw)	rw for firewood (FWrw)	208	0.7	0	0	208	0.8	0	0
	rw for the manufactured wood products industry and final consumption other than firewood (MWrw)	1 553	5.5	41	2.6	962*	3.8	0	0
	<i>Sub total</i>	<i>1 760</i>	<i>6.3</i>	<i>41</i>	<i>2.6</i>	<i>1 802</i>	<i>7.1</i>	<i>0</i>	<i>0</i>
Manufactured wood products (MW)	MW of the wood industry (w)	3 499	12.5	82	5.1	2 633	10.3	1 043	24.7
	MW of the pulp and paper industry (z)	15 847	56.5	1 294	81.2	14 856	58.2	2 410	57.0
	MW of the furniture industry (f)	6 920	24.7	176	11.1	6 221	24.4	773	18.3
	<i>Sub total</i>	<i>26 266</i>	<i>93.7</i>	<i>1 552</i>	<i>97.4</i>	<i>23 710</i>	<i>92.9</i>	<i>4 226</i>	<i>100.0</i>
Total		28 026	100.0	1 593	100.0	25 512	100.0	4 226	100.0

The values for FWrw and MWrw do not include the proportion of Forestry and forestry support services related to them, which reached 253.7 billion 2015 COP in 2020. *National production related to forest plantations (MWfprw). **National production related to natural forests (MWnfrw). The value of consumption for furniture includes the value of Gross Fixed Capital Formation. The aggregated value of consumption and exports of WFP represented 2% of the value of all products and services consumed and exported in Colombia during 2020. In the context of this presentation, 1 billion = 1 000 million for both currencies, COP and USD. Calculations based on data from DANE (2023).

Landscape of the Manufactured Products of the Wood Industry (**w**) Market in 2021

General division of products included in the w market	Subdivision according to the National Accounts of Colombia	Products included	Consumption		National Production		Exports		Imports	
			Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)	Value (2015COP billion)	Share (%)
Sawnwood	Group 1	Wood sawn or sliced lengthwise, sliced or debarked, more than 6 mm thick, and wooden sleepers for railways or tramways, not impregnated	1 004	22	951	28	27	27	77	5.7
	Group 2	Wood with continuous profiling along any of its edges or faces; wood wool; wood flour; wood in chips or particles; raw wood, including those treated with paint, stains, creosote or other preservatives; and treated wooden sleepers for railway or tramways	821	18	849	25	23	23	4	0.3
	<i>Subtotal (G 1 & 2)</i>			1 825	40	1 800	53	50	50	81
wood-based panels	Group 3:	Boards and panels; veneer sheets of wood; plywood sheets; densified wood	1 597	35	611	18	18	18	1 131	84
value-added sawnwood derivatives	Group 4	Carpentry works and construction parts (such as cellular wood panels, jointed panels for parquet floors, clapboards, and shakes)	639	14	611	18	16	16	54	4
	Group 5	Wooden containers like drawers, boxes, crates, and pallets; wooden reels for cables; cooperage products like barrels and vats and their parts; and other wooden items such as handles, kitchenware, and marquetry	502	11	374	11	16	16	81	6
	<i>Subtotal (G 4 & 5)</i>			1 141	25	985	29	32	32	135
Total			4 563	100	3 396	100	99	100	1 346	100

Main indicators of Colombia's market for w and wood industry

Variable Name and Symbol	Value (2015COP billion)			Annual Growth rate - AGR (%)		
	2019	2020	2021	2019-2018	2020-2019	2021-2020
Supply (National Production) – Sw	2 883.3	2 633.5	3 395.9	-7.3	-8.7	29.0
Consumption - Cw	3 984.5	3 499.0	4 562.8	-2.8	-12.2	30.4
Exports – Xw	97.3	81.6	99.2	-18.3	-16.1	21.6
Imports – Mw	1 202.2	1 043.2	1 346.0	5.8	-13.2	29.0
Demand – Dw (Dw = Cw + Mw - Xw)	2 879.6	2 537.4	3 316.0	-6.6	-11.9	30.7
Unbalance of Market Clearing Condition - UMCCw (Supply - Demand)	3.7	96.1	79.9			
Unbalance of Market Clearing Condition as percentage of Supply UMCCw [(Supply - Demand)/Supply in %]	0.1	3.6	2.4			
Capital of the wood industry – Kw (Value of Machinery and Equipment in the MAS)	493	513	not available	6.3	4.2	not available
Capital of the wood industry - Kw (Value of Building and Structures in the MAS)	146	154	not available	5.0	5.8	not available
Labor of wood industry - Lw (Number of employees as reported in the MAS)	5 015	4 750	4 958	-5.9	-5.3	4.4
Establishment reporting to the MAS (number)	149	141	141	-8.6	-5.4	0.0
Supply price deflator - PSw	1.343	1.389	1.517	12.97	4.65	12.83
Consumption price deflator - PCw	1.261	1.322	1.484	10.27	6.04	16.17
Export Price Deflator – PXw	0.956	1.078	1.109	4.11	12.25	3.02
Import Price Deflator – PMw	0.971	1.050	1.257	2.90	7.91	20.66

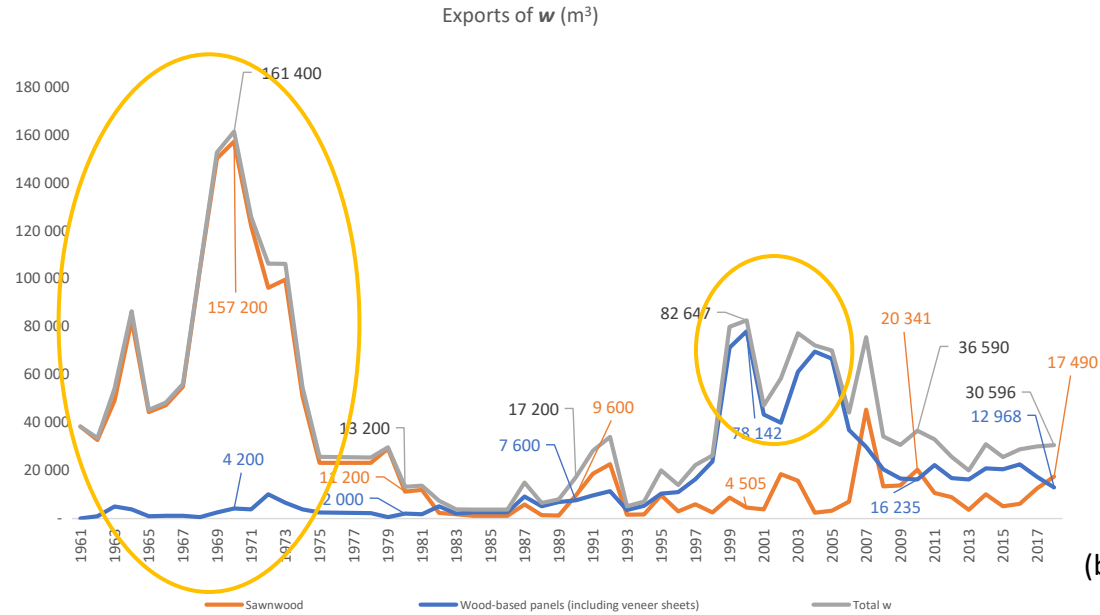
Source: Martínez-Cortés & Kant (2024), DOI <https://doi.org/10.62320/jfbr.v3i1.46>. Calculations bases on data from DANE (2023a). In the context of this presentation, 1 billion = 1 000 million for both currencies, COP and USD.

Colombia's trade balance for manufactured products of the wood industry

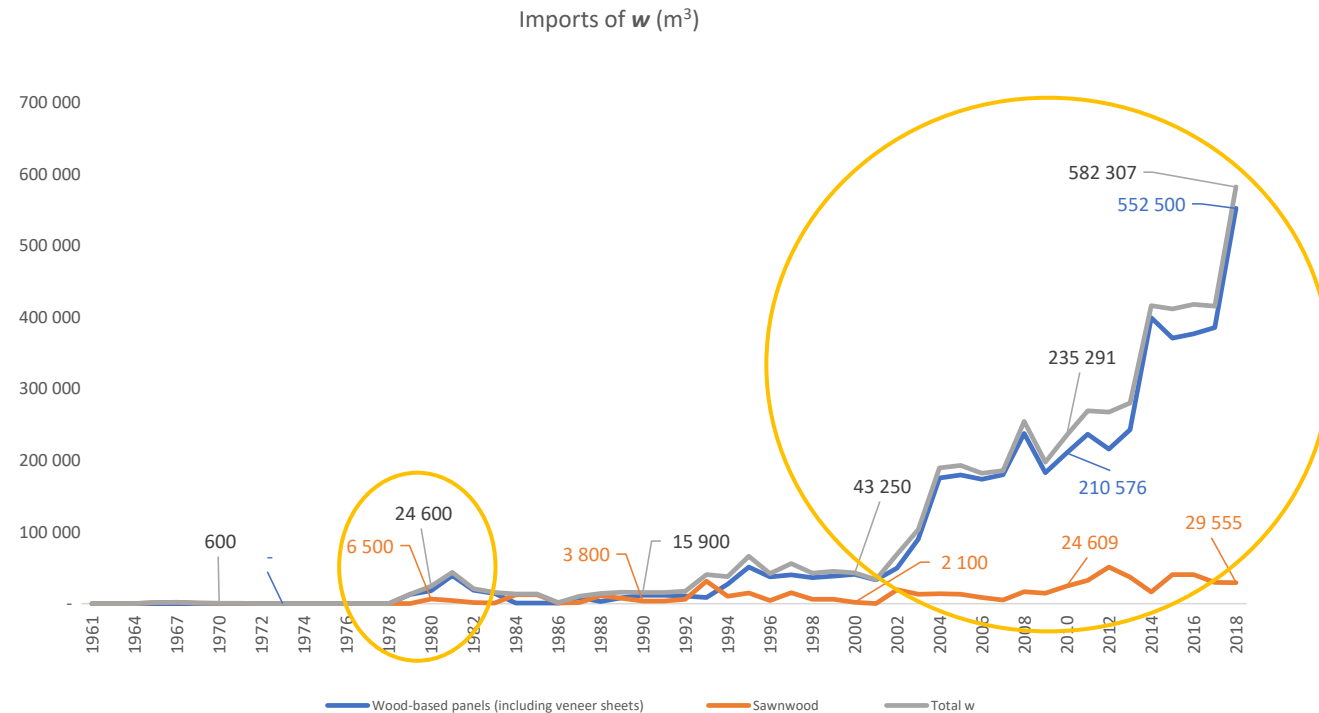
Product traded	2019		2020		2021	
	Imports	Exports	Imports	Exports	Imports	Exports
Particle board (m ³)	261 741	2 601	278 754	1 946	354 606	1 946
MDF/HDF (m ³)	59 962	236	63 807	118	136 387	368
Plywood (m ³)	40 684	304	35 508	293	33 790	279
Hardboard (m ³)	11 162	9	9 556	-	10 829	-
Other fiberboards (m ³)	21 627	32	33 389	553	3 226	553
OSB (m ³)	1 515	40	4 254	258	13,322	389
Veneer sheets (m ³)	1 080	1	940	-	830	15
Wood chips and particles (m ³)	54	8	74	-	67	
Other agglomerates (tons)	37	496	49	1 414	41	1 193
Sawnwood, coniferous (m ³)	28 705	139	23 965	62	43 839	476
Sawnwood, non-coniferous all (m ³)	1 188	17 481	926	18 934	696	14 775
Wood residues (m ³)	43	25	13	-	17	29
Wood pellets (tons)	27	84	4	20	-	91
Wood-based panels, including veneer sheets (m³)	397 771	3 223	426 208	3 168	552 989	3 550
Sawnwood (m³)	29 893	17 620	24 891	18 996	44 535	15 251
Wood residues and wood chips and particles (m³)	97	33	87	-	85	29
Other agglomerates and wood pellets (tons)	64	580	53	1 434	41	1 284
Total trade of manufactured products of the wood industry (m³), excluding Other agglomerates and wood pellets	427 761	20 876	451 186	22 164	597 609	18 830

Historical tracking of Colombia's exports and imports for manufactured products of the wood industry (**w**)

(a)



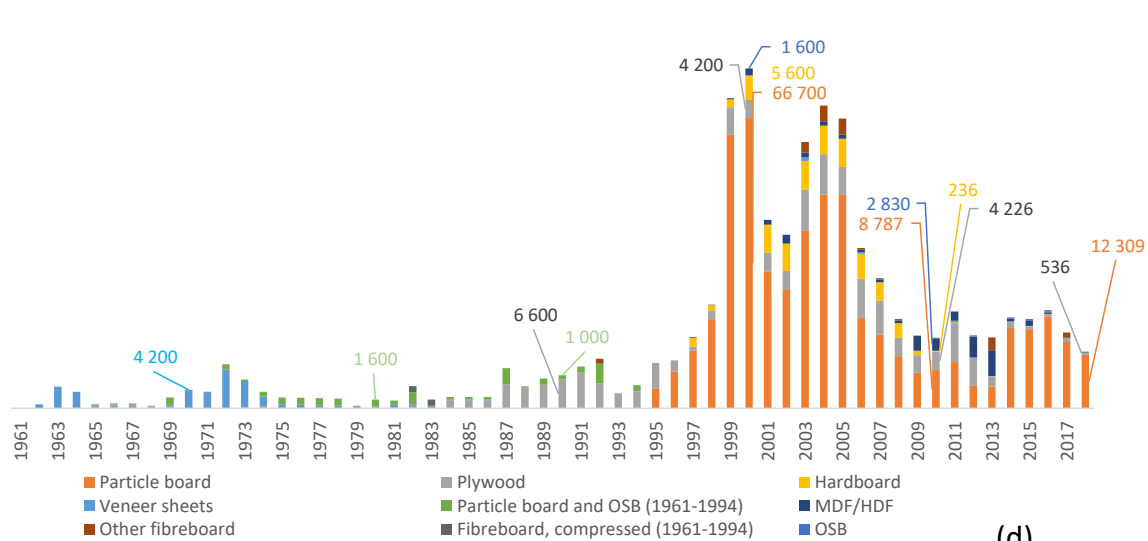
(b)



Historical tracking of Colombia's exports and imports for wood-based panels

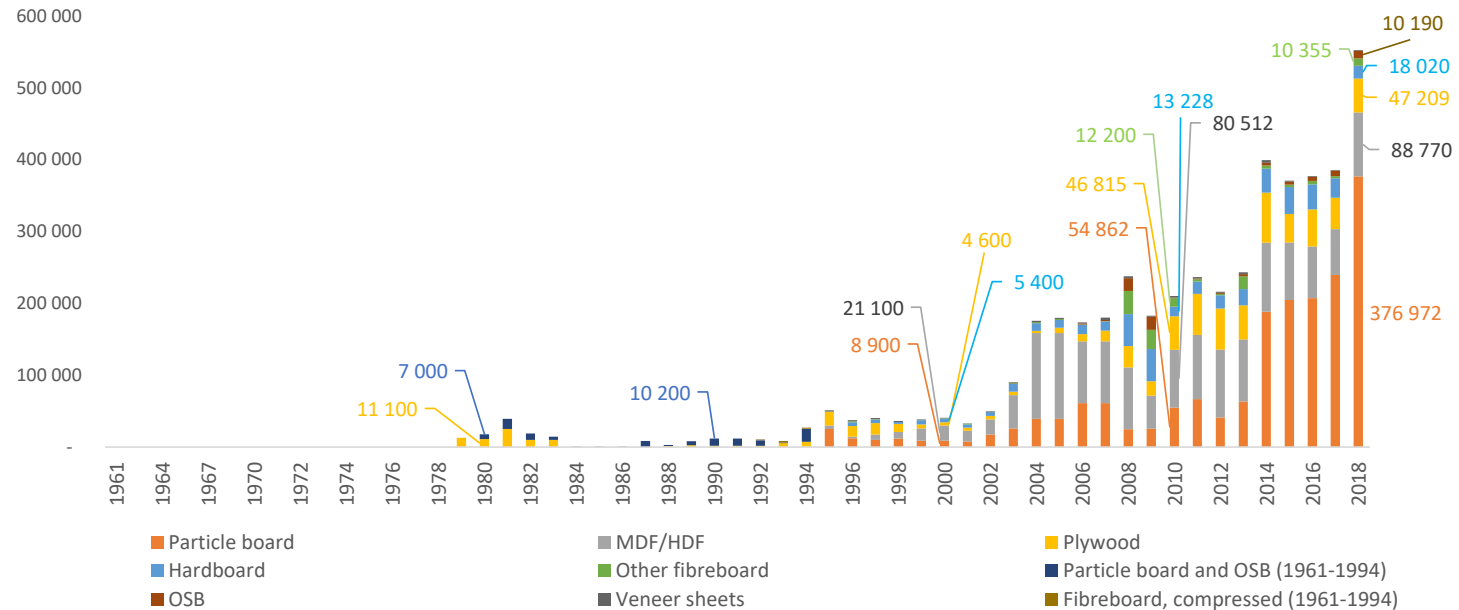
(c)

Exports of wood-based panels (m³)



(d)

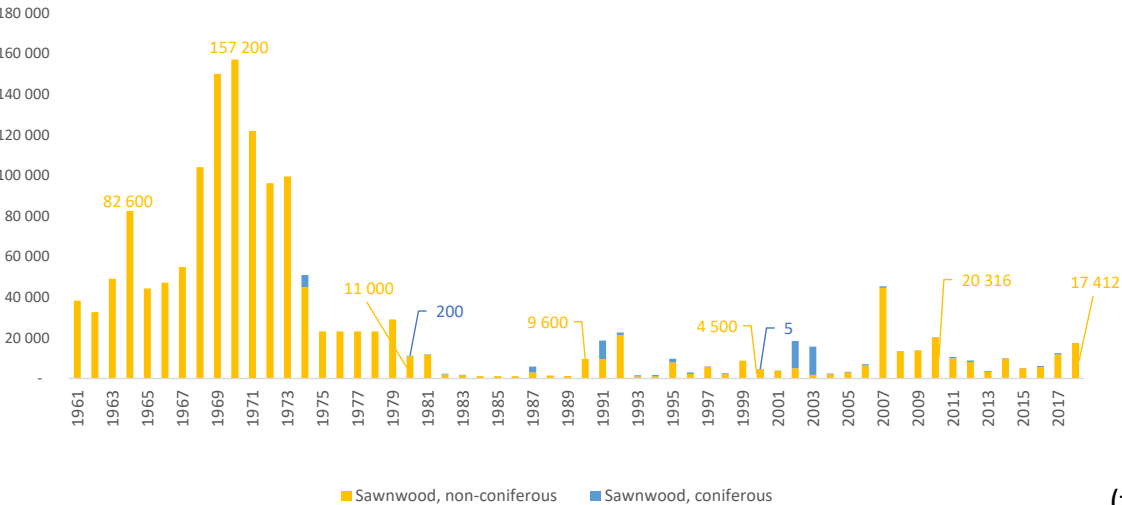
Imports of wood-based panels (m³)



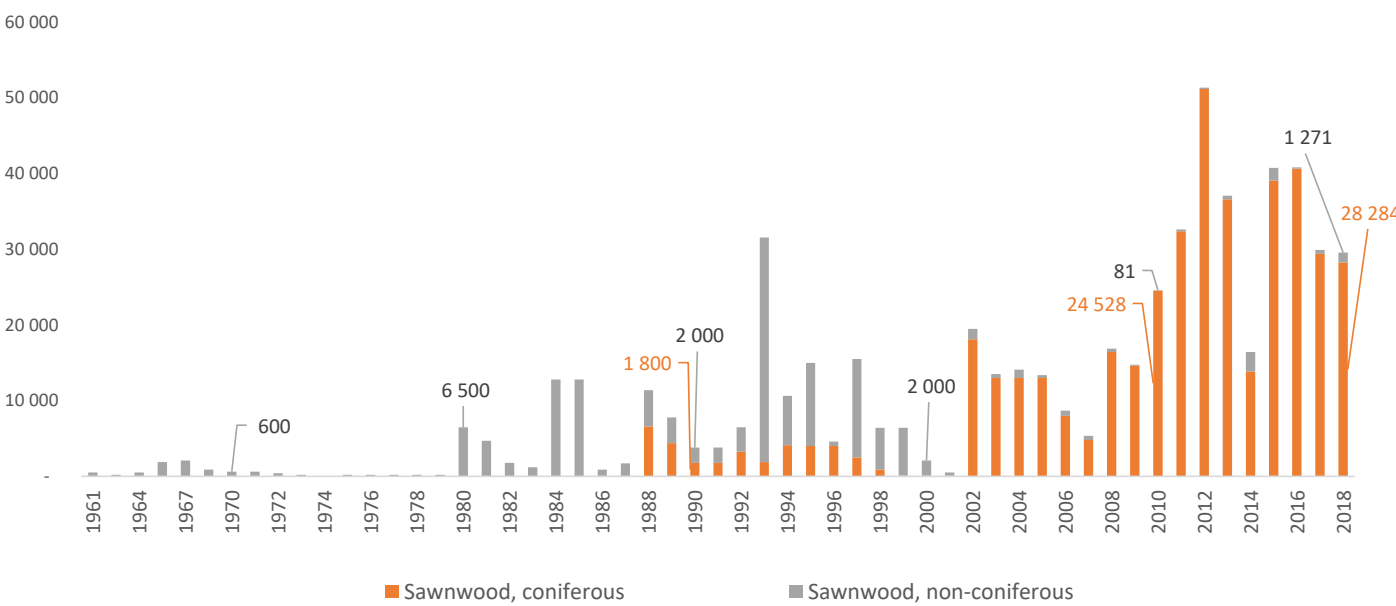
Source: Martínez-Cortés (2023), <https://hdl.handle.net/1807/128152>.
 Also available at Martínez-Cortés & Kant (2024), DOI <https://doi.org/10.62320/jfbr.v3i1.46>.

Historical tracking of Colombia's exports and imports for sawnwood

(e) Exports of sawnwood (m³)



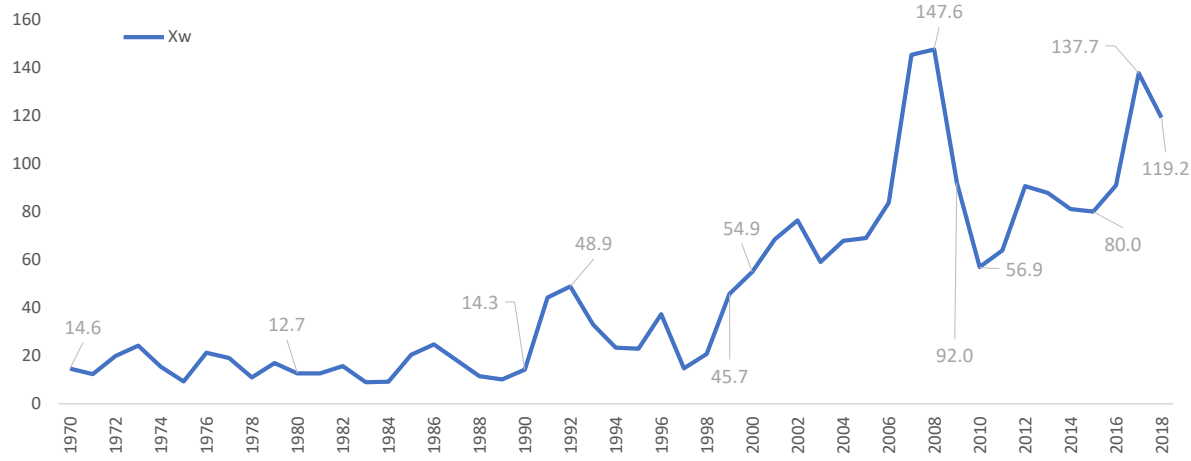
(f) Imports of sawnwood (m³)



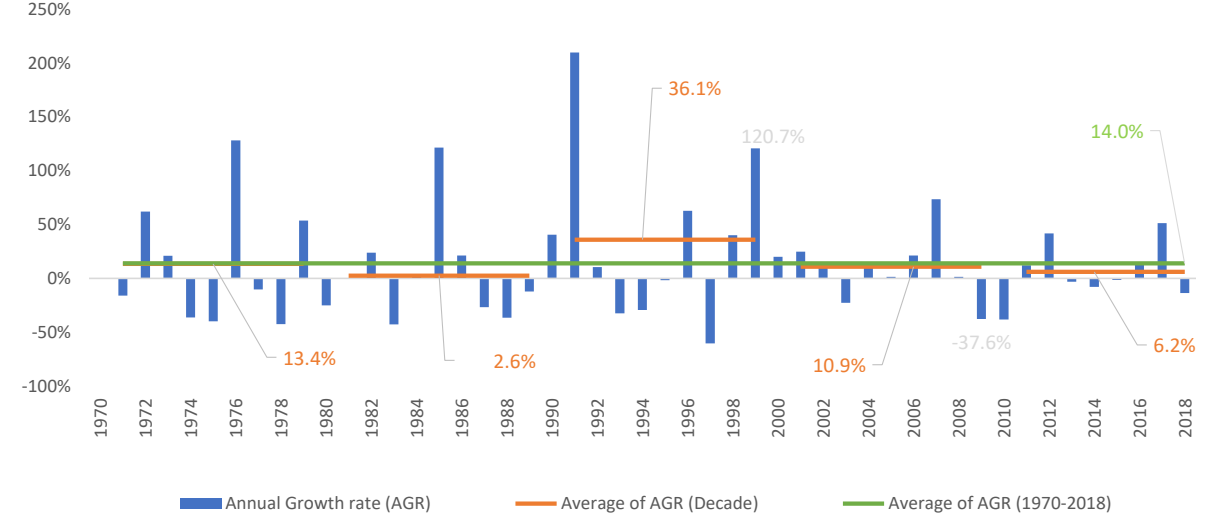
Source: Martínez-Cortés (2023), <https://hdl.handle.net/1807/128152>.
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Historical tracking of Colombia's trade balance for manufactured products of the wood industry (w)

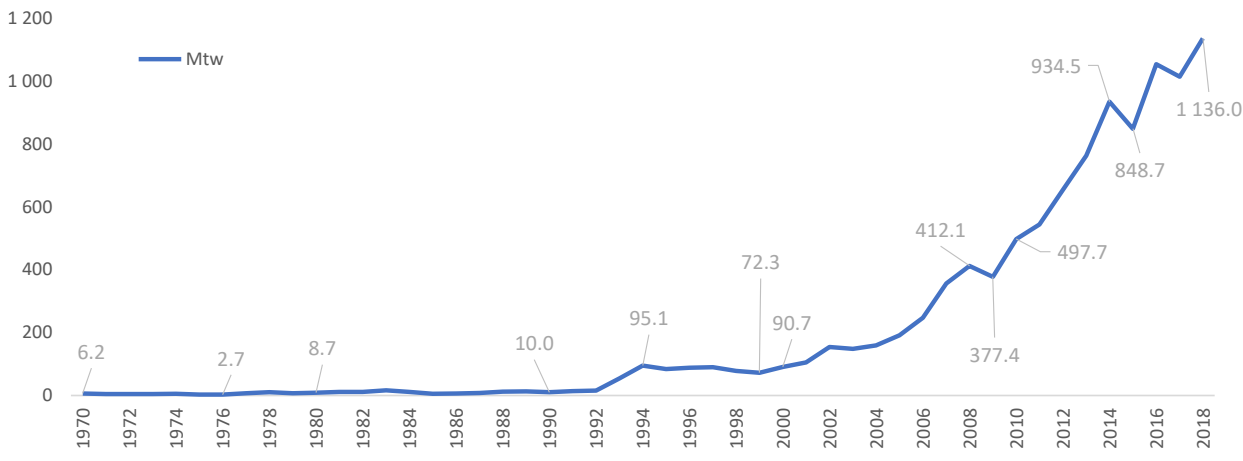
(g) Exports of manufactured wood products of the wood industry - Xw
(At purchaser's prices - FOB-. 2015 COP billion)



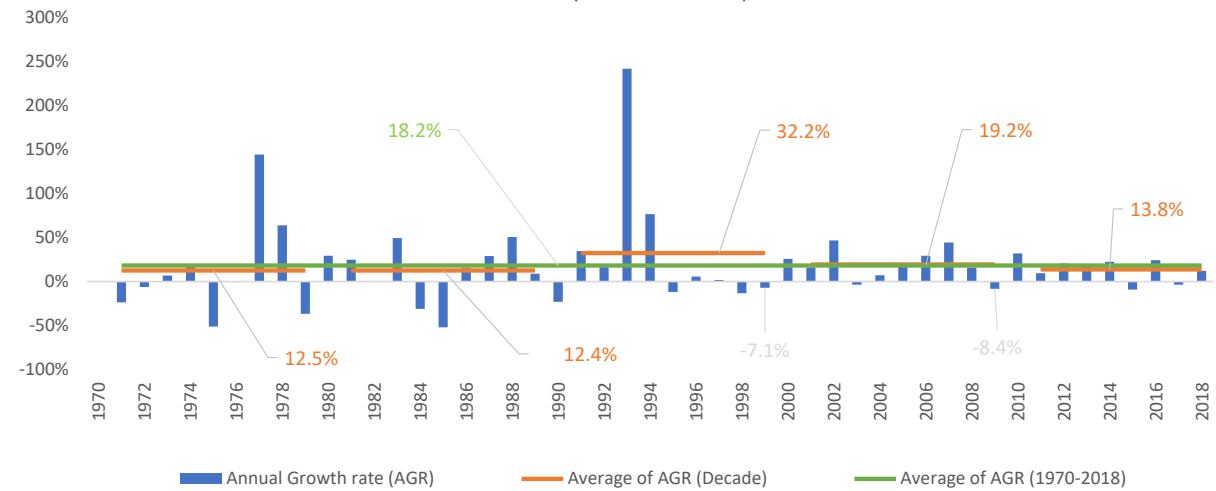
(h) Exports of manufactured wood products of the wood industry - Xtw
(Growth rates %)



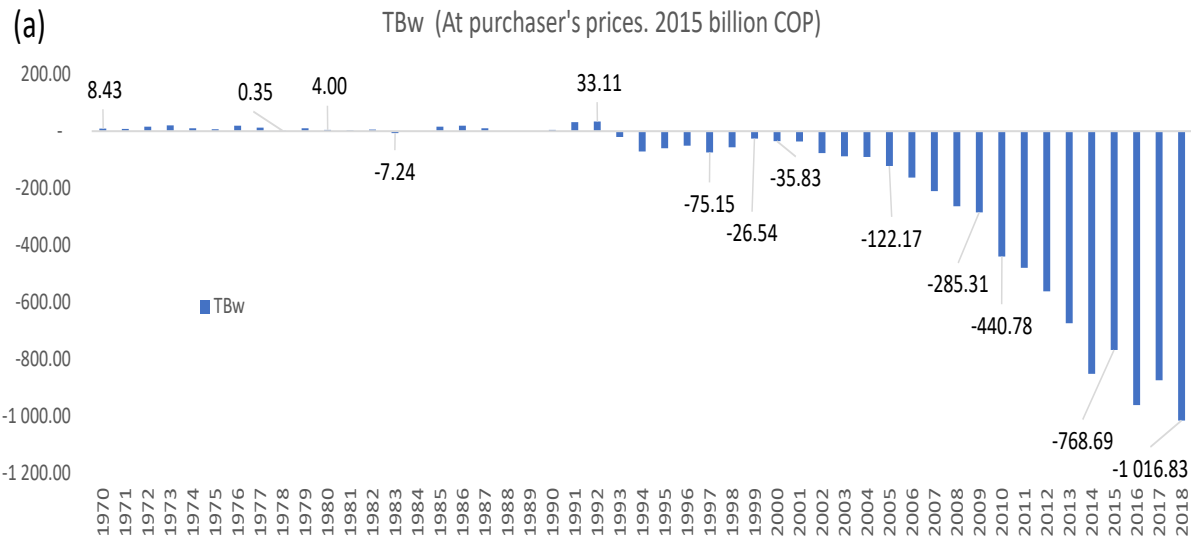
(i) Imports of manufactured wood products of the wood industry - Mw
(At purchaser's prices. 2015 COP billion)



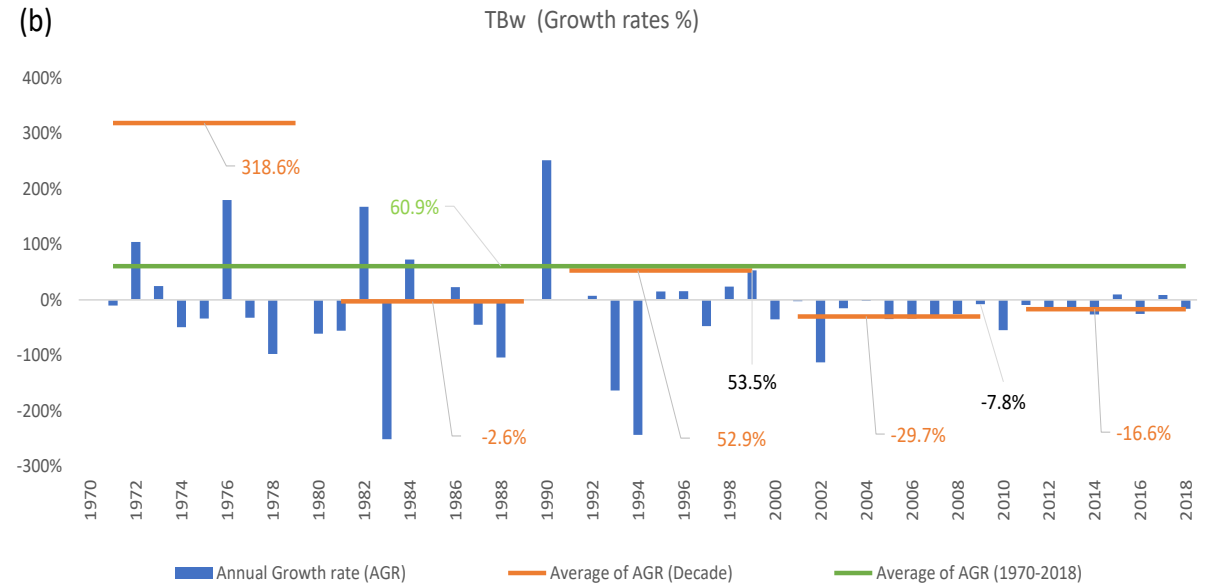
(j) Imports of manufactured wood products of the wood industry - Mtw
(Growth rates %)



Historical tracking of Colombia's trade balance for manufactured products of the wood industry (w)

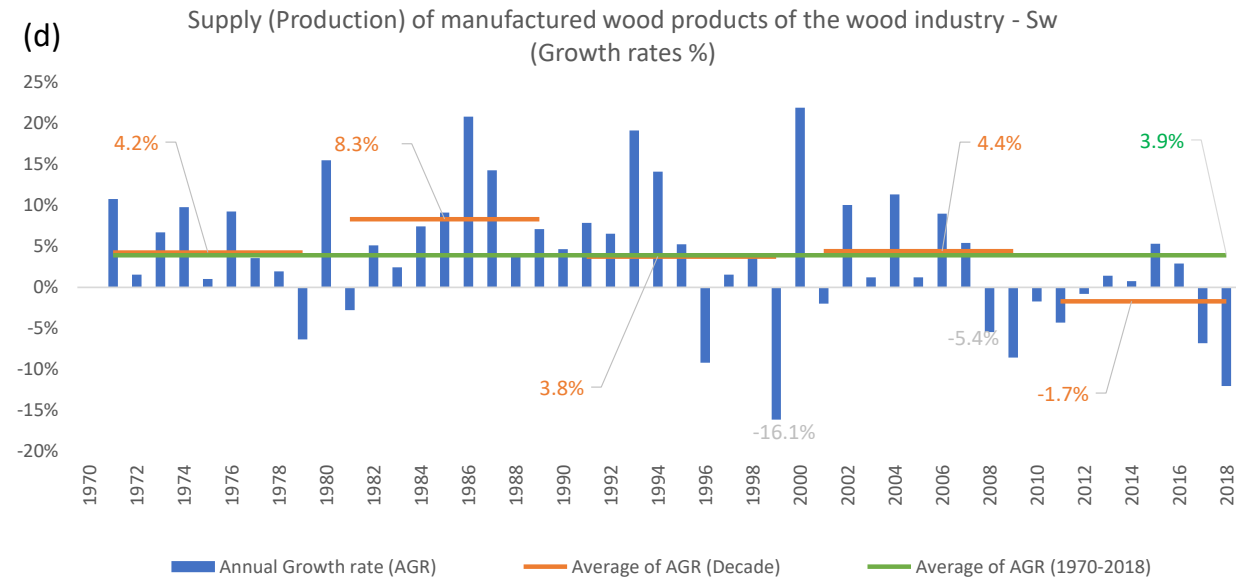
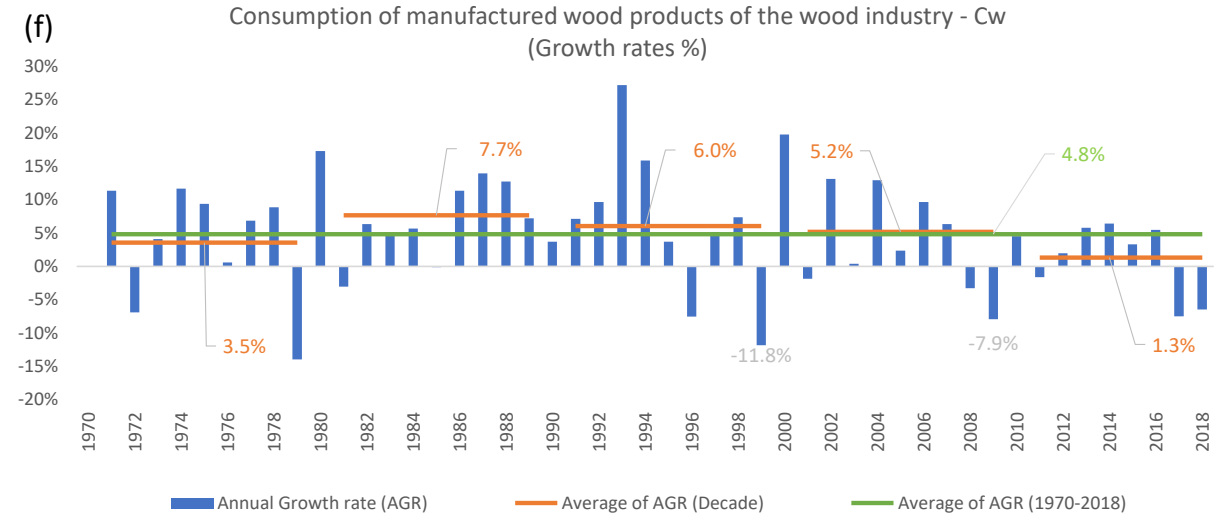


Values of Exports (X) in FOB prices. Values of Imports (M) in CIF prices plus taxes plus commercialization and transportation margins.



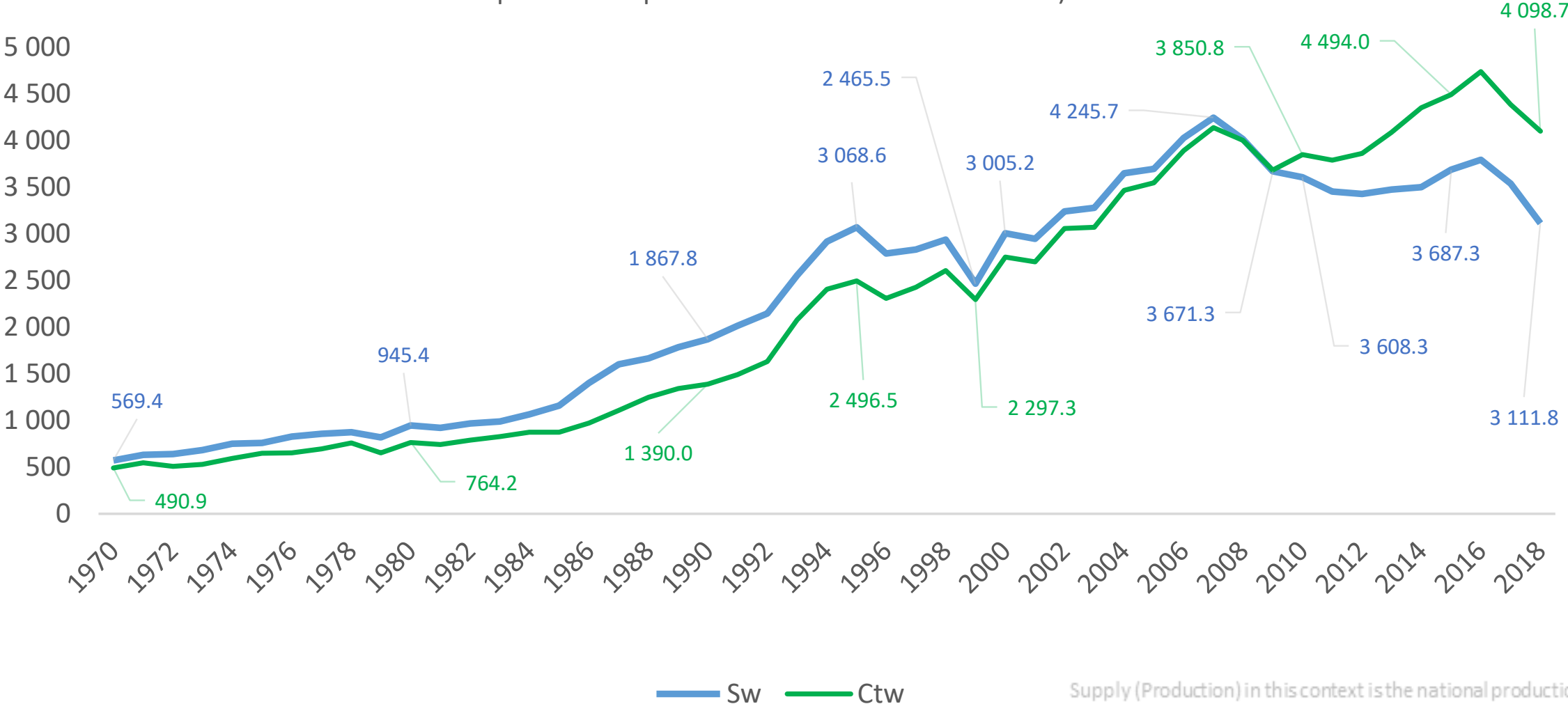
AGR for 1976 (+2779.0 %) and 1985 (+862.9%), 1989 (+636.7%) and 1991 (+614.6%) were not graphed to allow other AGR to be seen

Historical tracking of Colombia's Consumption and Supply of manufactured products of the wood industry (w)



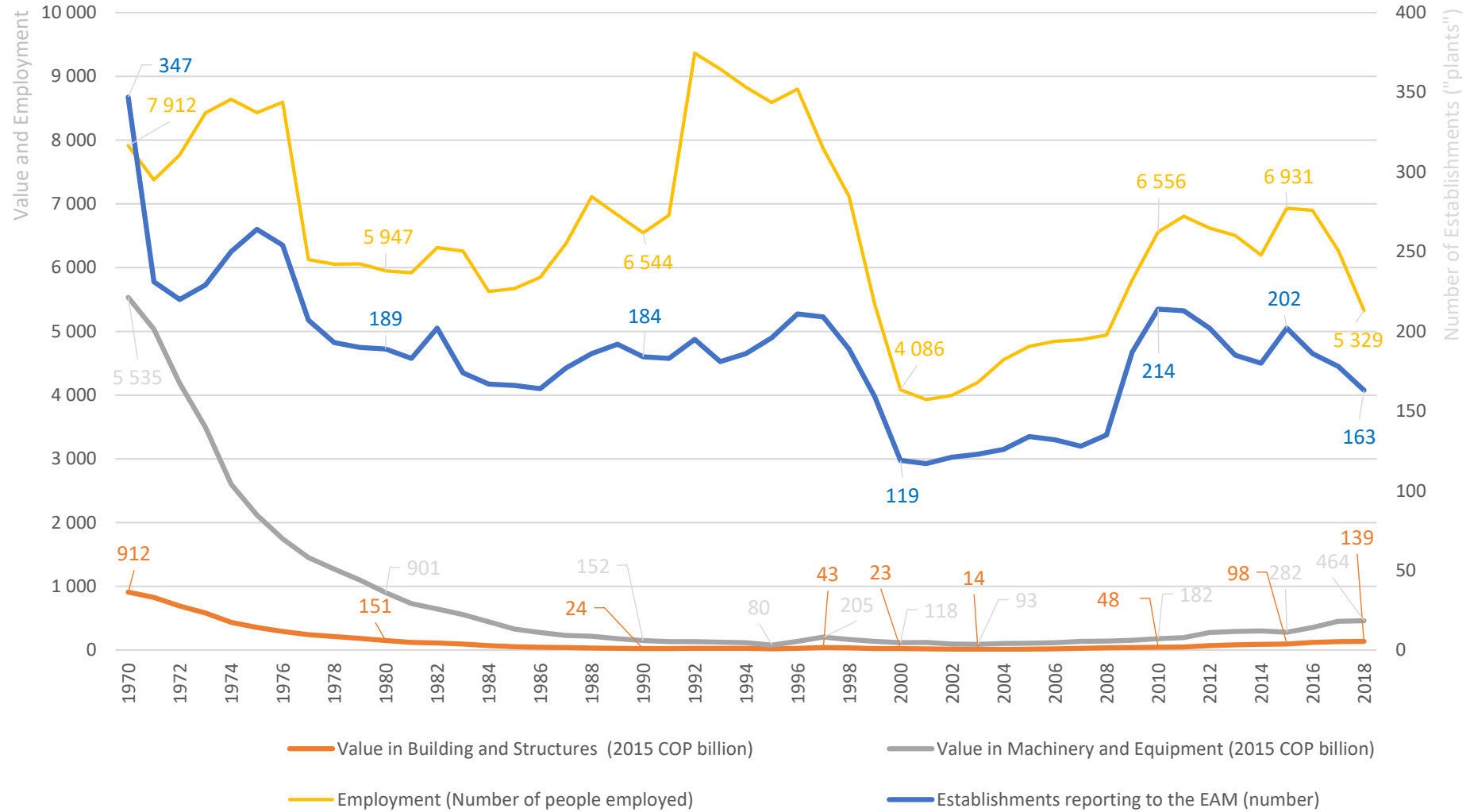
Historical tracking of Colombia's Consumption and Supply of manufactured products of the wood industry (w)

Supply (Production) vs Consumption of manufactured wood products of the wood industry (Sw and Cw at purchaser's prices. 2015 thousand million COP)



Source: Modified from Source: Martínez-Cortés (2023), <https://hdl.handle.net/1807/128152>.

Historical tracking of Colombia's wood industry indicators in the manufacturing annual survey



GRACIAS