

12TH EUROBLOCK FORUM: ITALY



The logo for the Euroblock Forum 2023 features a stylized circular emblem on the left, composed of several horizontal lines of varying lengths that curve around a central point. To the right of this emblem, the words "EUROBLOCK" and "Forum 2023" are written in a bold, white, sans-serif font against a solid green background.

EUROBLOCK
Forum 2023

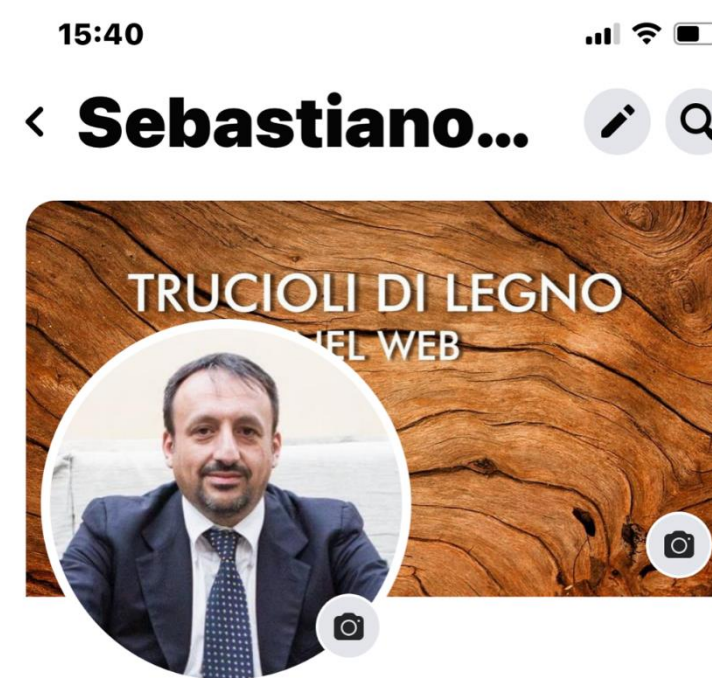


Thursday, 04.05.2023
until
Friday, 05.05.2023

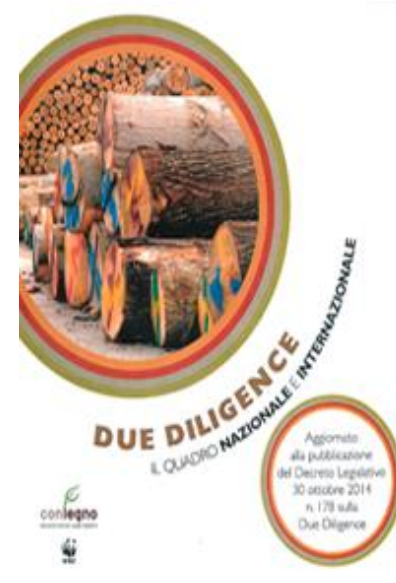
Courtyard by Marriott
München-Garching
Walther-von-Dyck-Strasse 10
85748 Garching bei München,
Germany



SEBASTIANO CERULLO: SOME OF HIS PUBLICATIONS IN THE WOOD SECTOR



Sebastiano Cerullo
Siamo tutti cambiati molto per poterci ritrovare migliori



Named in March 2018
“Academic correspondent” by the Accademia Italiana di Scienze Forestali [(Italian Academy of Forest Sciences)].
This acknowledgment honors work accomplished at a scientific and cultural level in support of the forests during these years of work for FederlegnoArredo.

Sebastiano Cerullo has participated as a speaker at more than 50 conferences, he was Managing Director of FederlegnoArredo, he is currently Secretary-General of Conlegno, he is the author of more than 20 books and more than 100 articles/publications about the wood industry.

References:
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<http://www.linkedin.com/in/sebastianocerullo>



THE HISTORY OF PALLETS



CONLEGNO AND THE ITALIAN BUSINESSMAN IN THE PALLET SECTOR ARE PLEASED TO SHARE THE ENGLISH VERSION OF THIS BOOK ON THE HISTORY OF PALLETS, IN EXCLUSIVE PREVIEW AT THIS EUROBLOCK MEETING, GIVEN OUR TIES TO THE PFEIFER GROUP AND THE GATTA FAMILY

WE AIMED TO TRACK THE HISTORY OF THE BEGINNING OF THE WOOD PALLET, A LOGISTIC TOOL THAT IS NOW PART OF THE DAILY LIFE OF MANY BRAVE, ENTERPRISING BUSINESSPEOPLE IN THE WOOD INDUSTRY WHO, DURING THE COVID-19 PANDEMIC, FINALLY SAW OFFICIAL RECOGNITION IN ITALY OF THEIR DECADES-OLD BUSINESS ACTIVITY DECLARED “ESSENTIAL” BY DECREE-LAW.

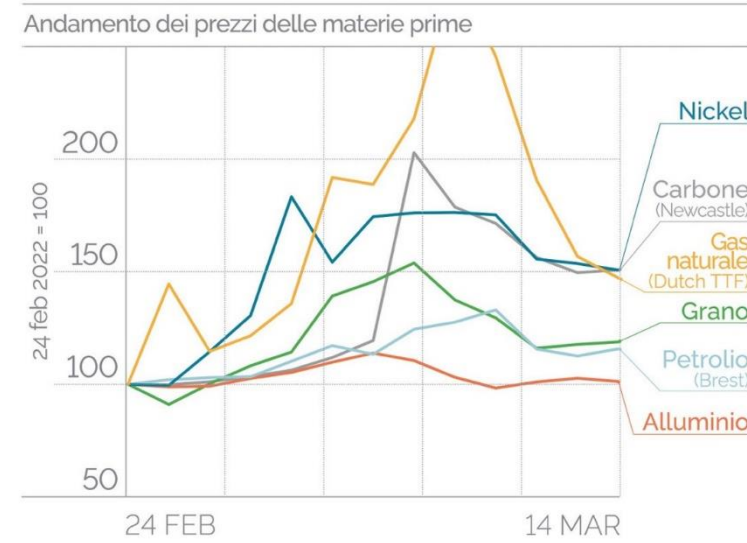
BETWEEN 2020 AND 2022, THESE BUSINESSES AND THIS OBJECT CALLED “PALLET” KEPT ITALIAN (AND EUROPEAN) INDUSTRY FROM GRINDING TO A HALT DESPITE A SERIOUS, MYSTERIOUS HEALTH EMERGENCY AND, TO THEM,

**THANKS ARE DUE FROM ALL OF US FOR
NOT STOPPING.**

LET’S BEGIN EXPLORING THE ORIGINS OF WOOD PALLETS.

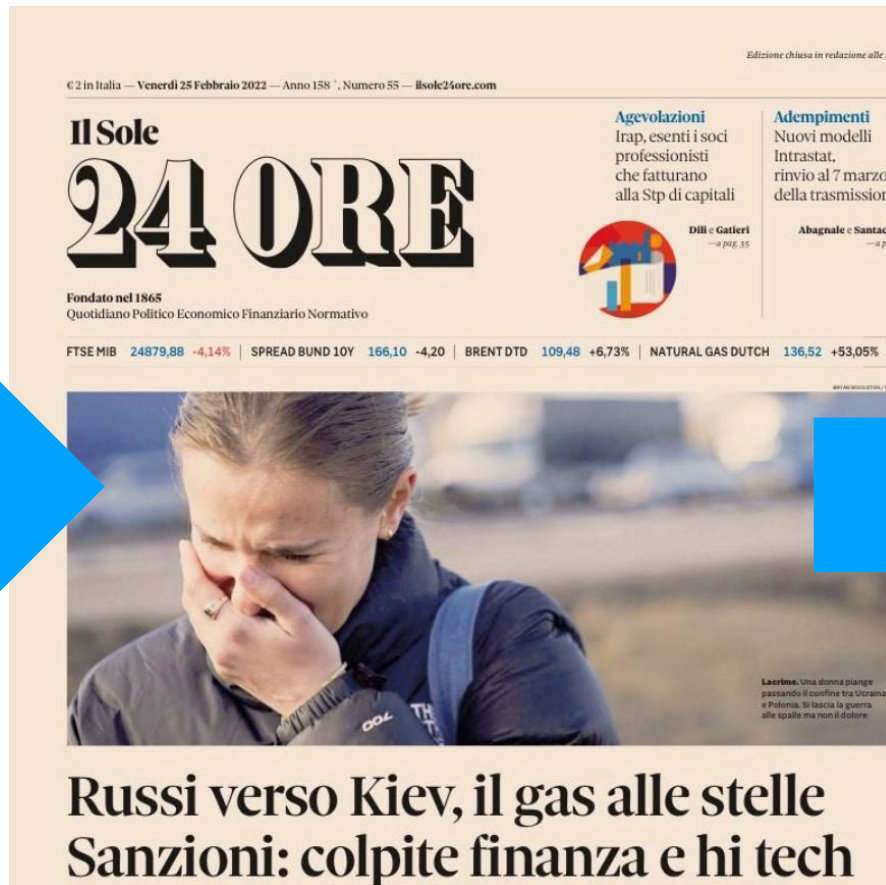
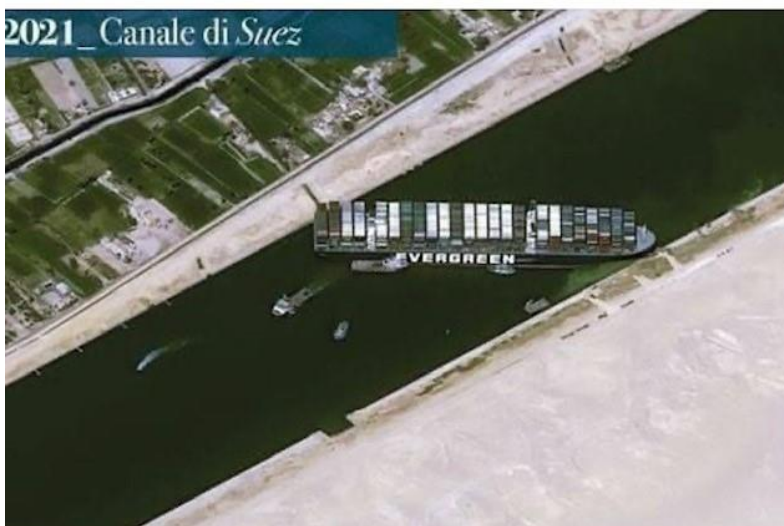
2021-2022 THINGS NEVER BEFORE SEEN

Guerra e materie prime: una questione di offerta



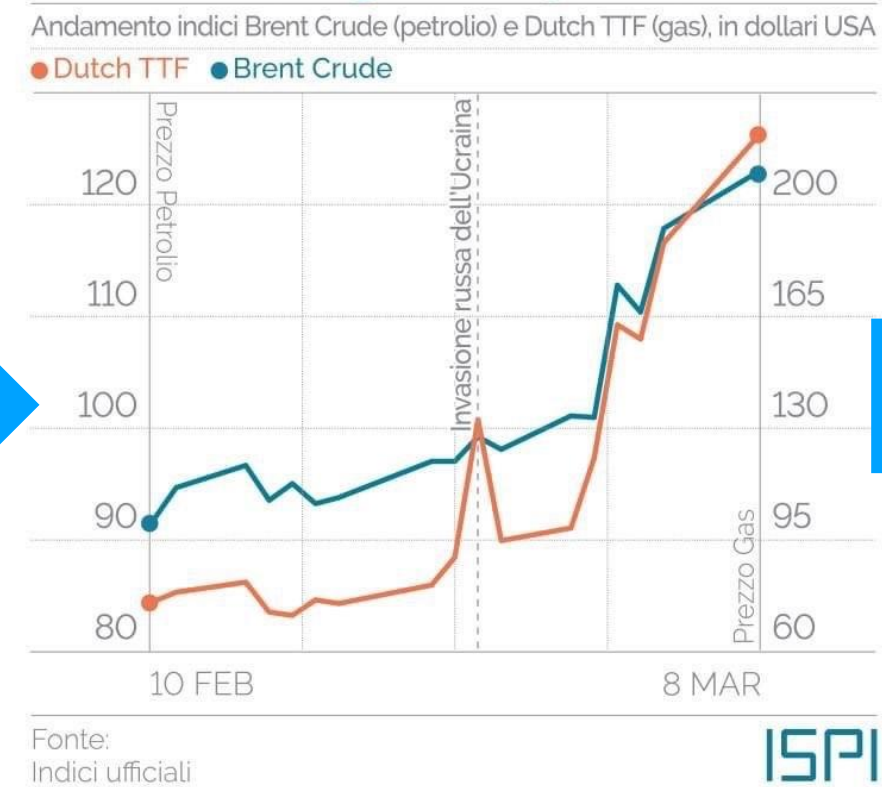
😬 Il 23 marzo 2021 la portacontainer Ever Given si incagliava nel Canale di Suez ostruendone il passaggio e bloccando un convoglio di ben 237 navi!

👍 Noi di Bianchi c'eravamo.
#DallaTuaParte #BianchiAssicurazioni
#50anniversario #NoiC'eravamo
#Bianchi1972 @valentina_picca_bianchi
@bianchiassicurazioni



WAR

Petrolio e gas esplosivi



ENERGY PRICES
(GAS AND
PETROLEUM)

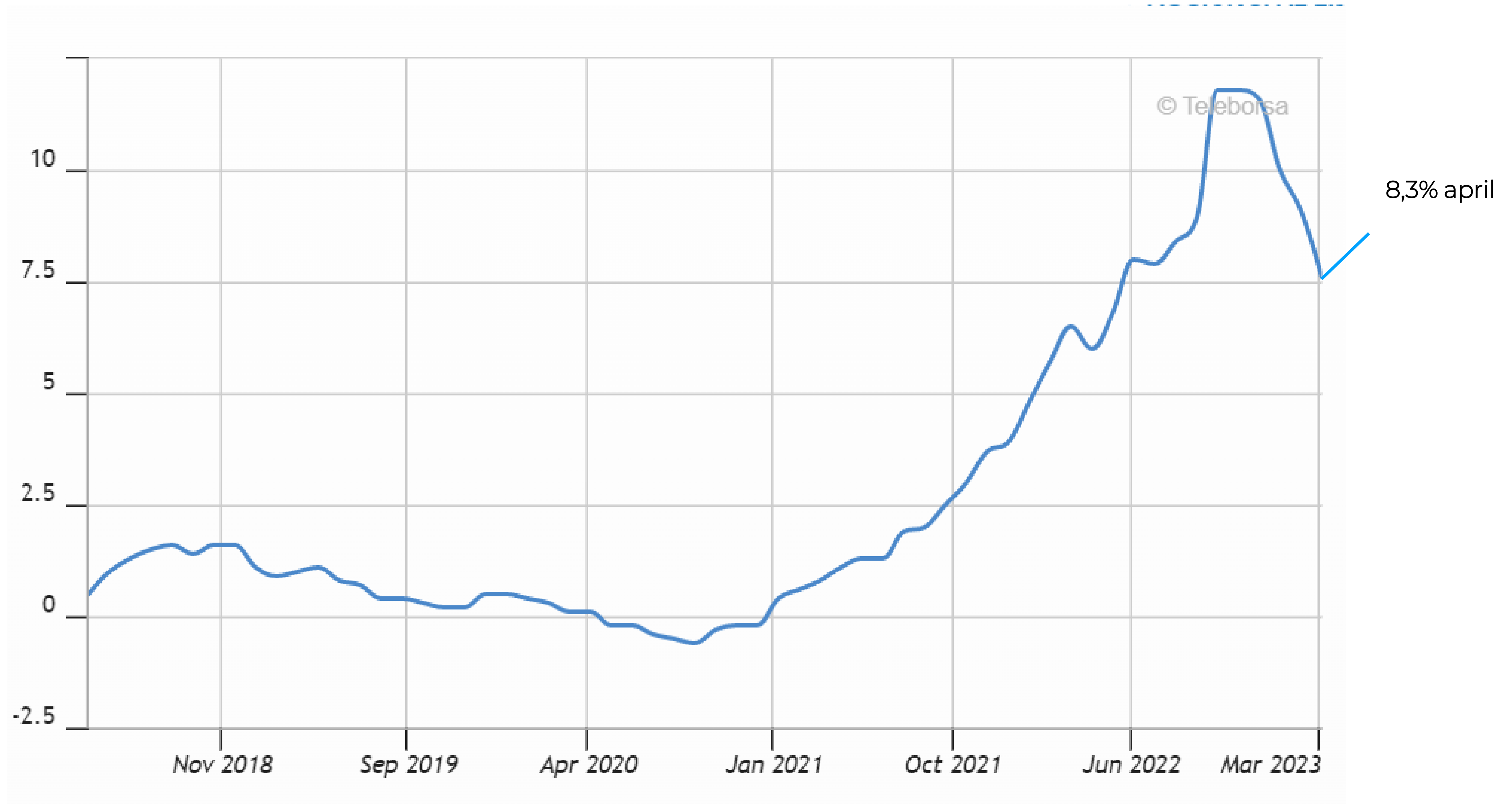


MANUFACTURING
LOCKDOWNS

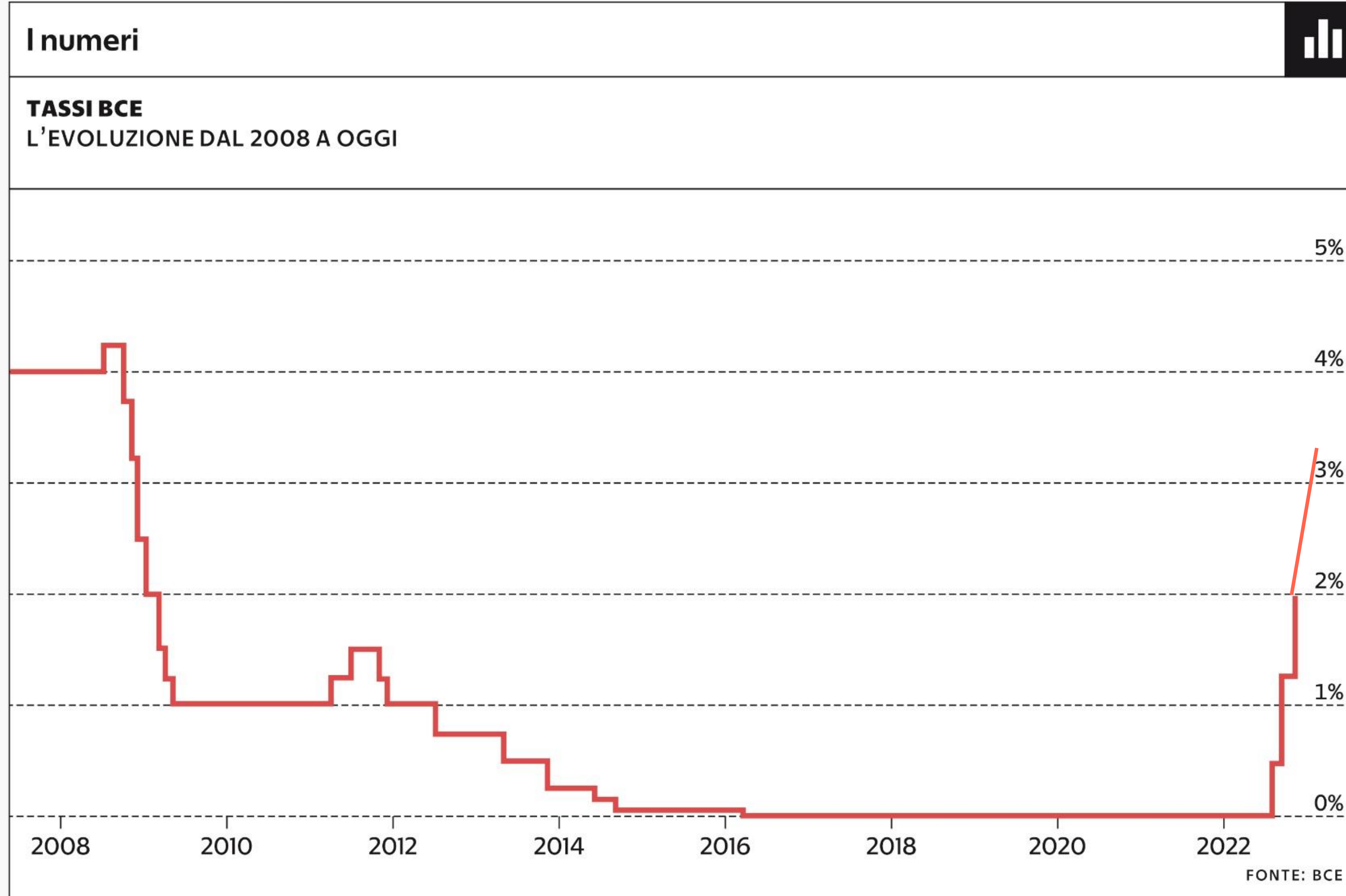
PANDEMIC

RAW MATERIALS AND
LOGISTICS CRISIS

NEW PROBLEMS? INFLATION



NEW PROBLEMS? ECB RATES



NEW PROBLEMS? (CLIMATE CHANGE) DROUGHT

R Repubblica @repub... · 5h ...
Europa, è già siccità da record. "E per l'estate rischio catastrofe" [di Enrico Franceschini]



repubblica.it
Europa, è già siccità da record. "E per l'estate risc...

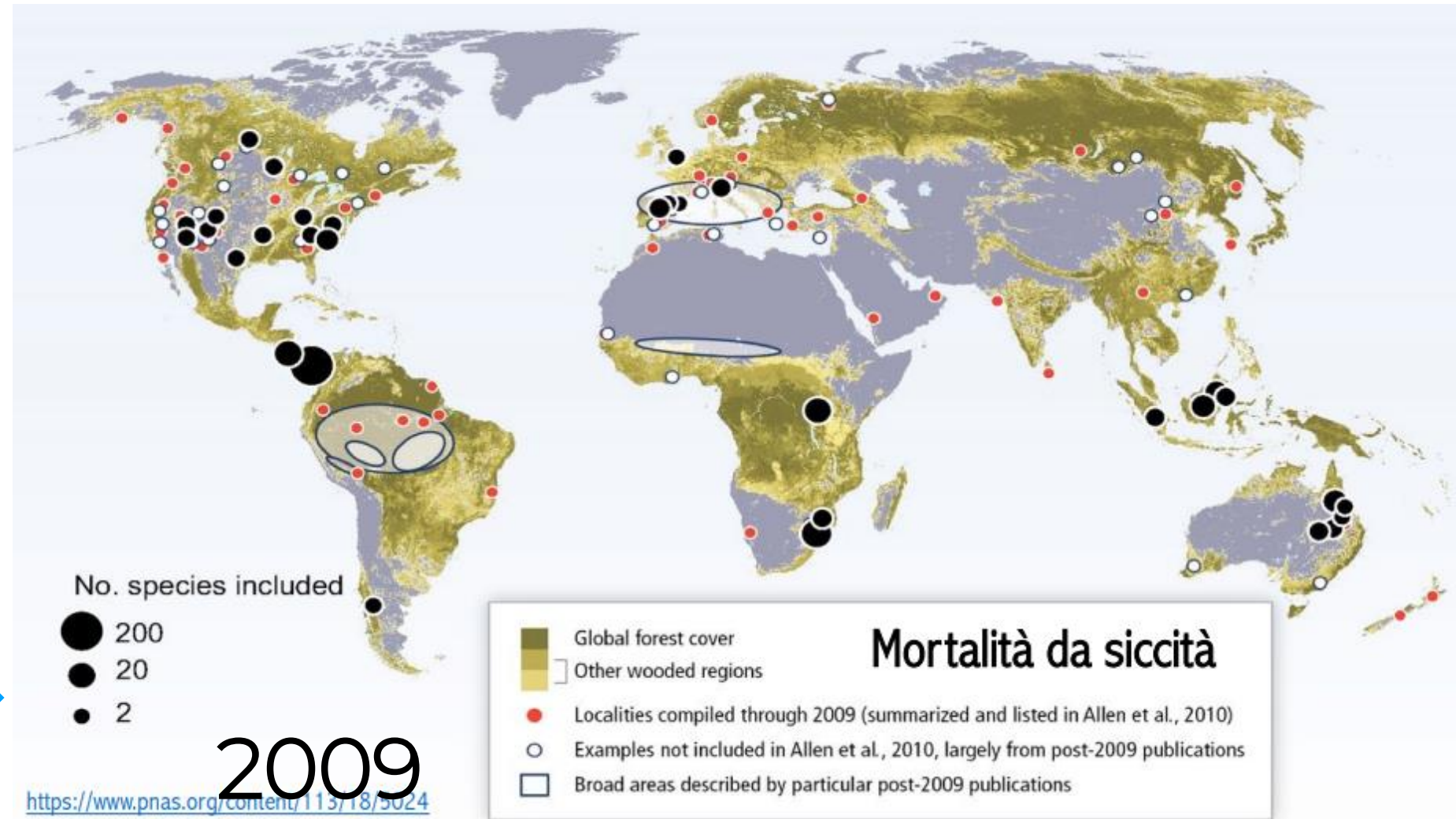
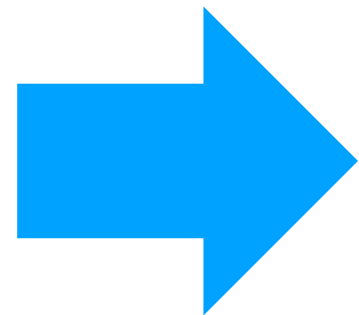
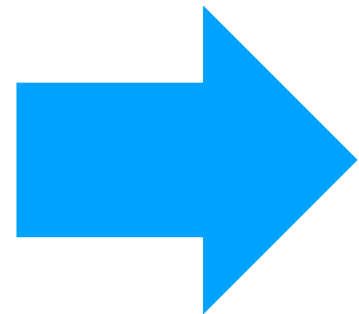
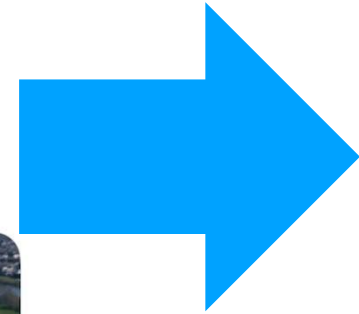
16 20 27

24

ILSole24ORE @sole2... · 1h ...
♦ La #neve di oggi è l'acqua di domani. E di neve, oggi, ce n'è molto poca. Marzo è il mese di picco per gli accumuli nevosi, ma il 2023 segna -63% rispetto alle medie. Le #Alpi, il più grande serbatoio di acqua che abbiamo, sono in crisi.



4 13 22



Drought- and heat-induced regional tree mortality events around the world

CRISI IDRICA

Bertone (Sant'Anna): «Quest'estate non avremo acqua»

di Redazione online

L'imprenditore: «La situazione delle fonti ora è buona ma il problema si presenterà in estate»

IL TIRRENO

Data: 07/11/2022 | Pagina: 10
Categoria: Carta e cartiere

Da 100 a 26 metri cubi di acqua per avere una tonnellata di carta

Legambiente e Assocarta a confronto sull'utilizzo della risorsa idrica

Per il dg dell'associazione Massimo Medugno la produzione di biogas dal riciclo rafforzerebbe l'economia circolare



Ips typographus (Bark beetle)

Attualità

Allarme siccità, cosa può succedere in estate: stop acqua in casa ed energia elettrica

Alessandro Nuzzo 23 Febbraio 2023 - 18:30

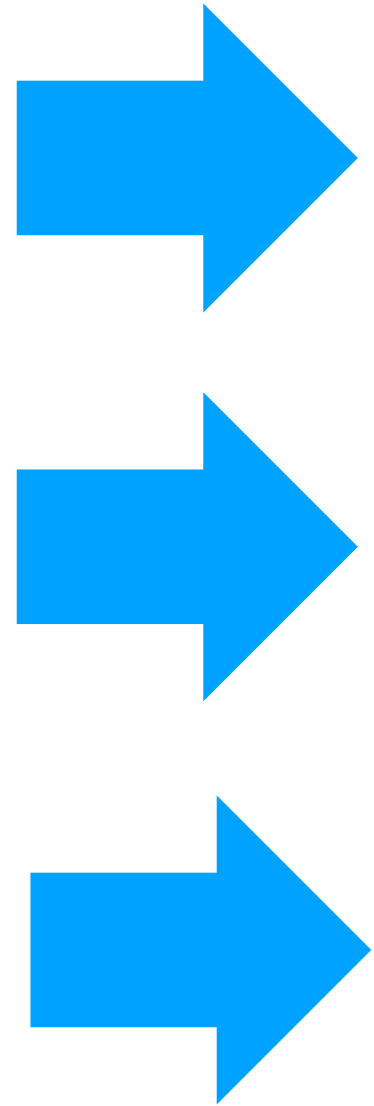
Dopo un mese di febbraio dal clima mite e totale assenza di piogge torna l'allarme siccità in Italia. Ecco cosa potrebbe prospettarsi in estate.

ALLIANZ TRADE

Fai crescere il tuo business

WHAT ELSE
COULD HAPPEN?

WHAT ELSE COULD HAPPEN?



ALIEN INVASION?

DID YOU KNOW THAT ITALY IS THE 4TH COUNTRY IN THE WORLD IN TERMS OF NUMBER OF BUSINESSES IN THE WOOD-FURNISHINGS SECTOR?



4TH

WOOD-PACKAGING PRELIMINARY RESULTS

SISTEMA IMBALLAGGI PRECONSUNTIVI 2022

FATTURATO **2,7** mld €
+23% su 2021



EXPORT **230** mln €
+49,9% su 2021



VENDITE ITALIA **2,5** mld €
+21% su 2021



Preconsuntivi 2022 a cura del Centro Studi FederlegnoArredo

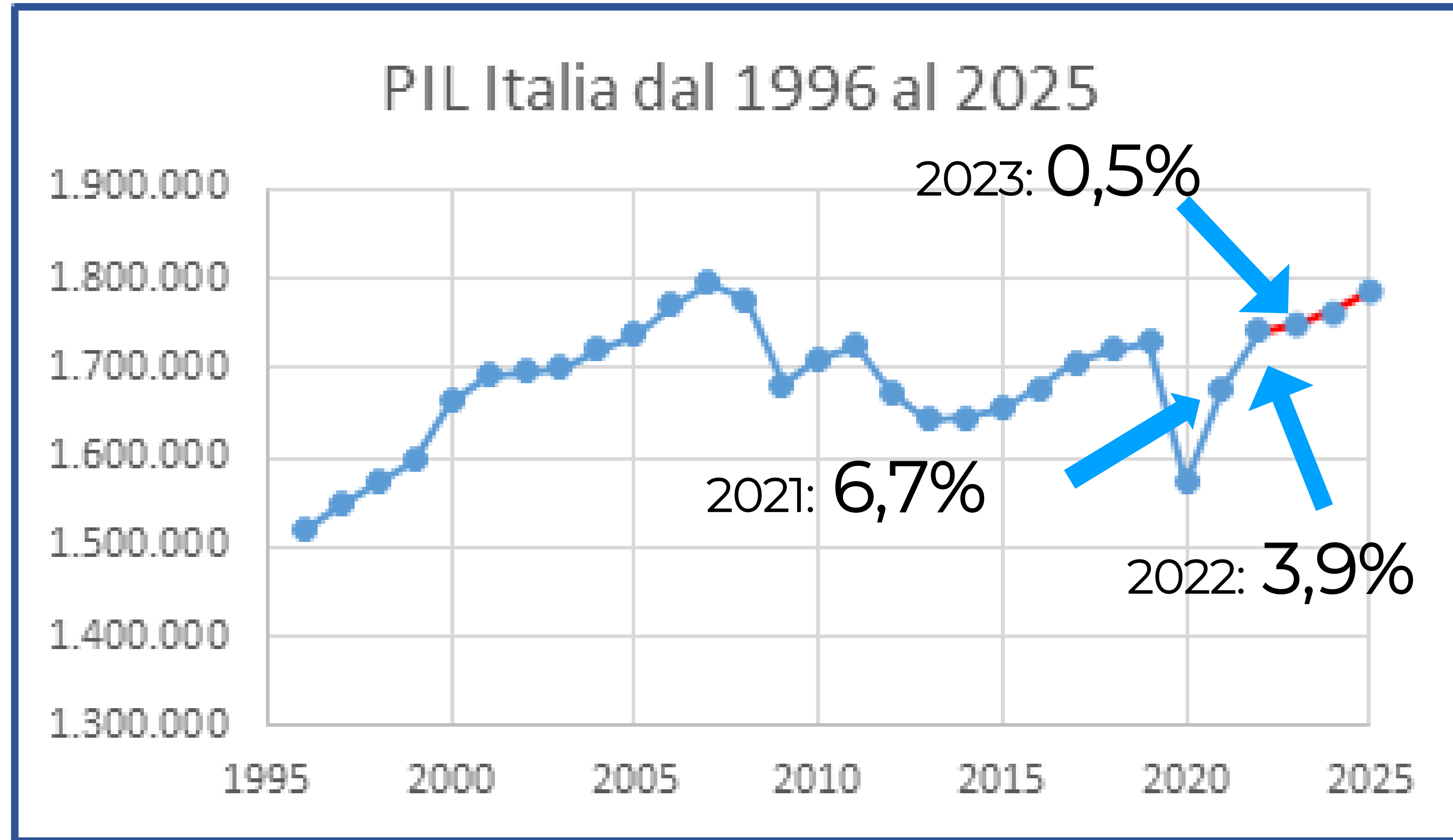
TURNOVER 2022

2,7 BILLIONS OF EURO

+23%

VS 2021

ITALY'S GDP – GROSS DOMESTIC PRODUCT

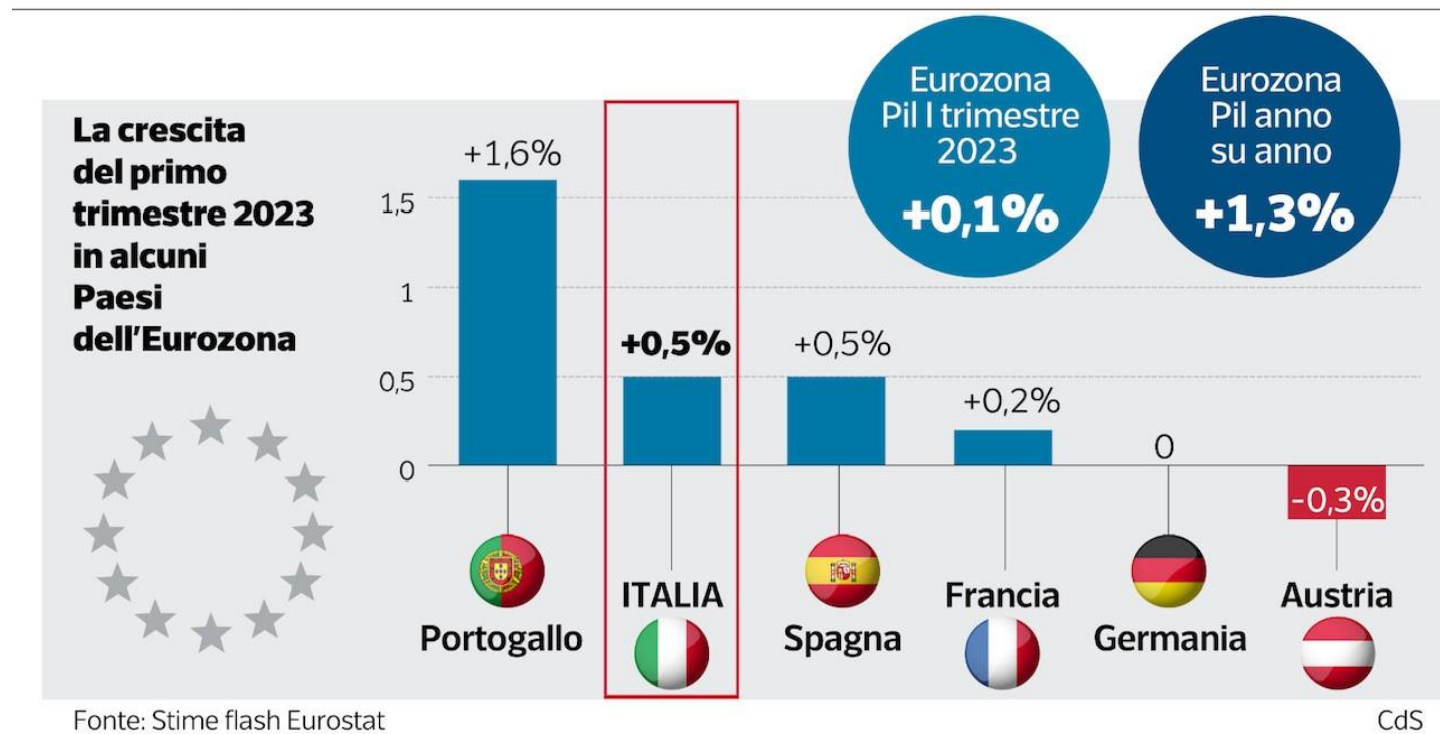


EUROSTAT

Pil, l'Italia cresce più di Germania e Francia La crescita nel primo trimestre 2023: i dati

di Redazione Economia

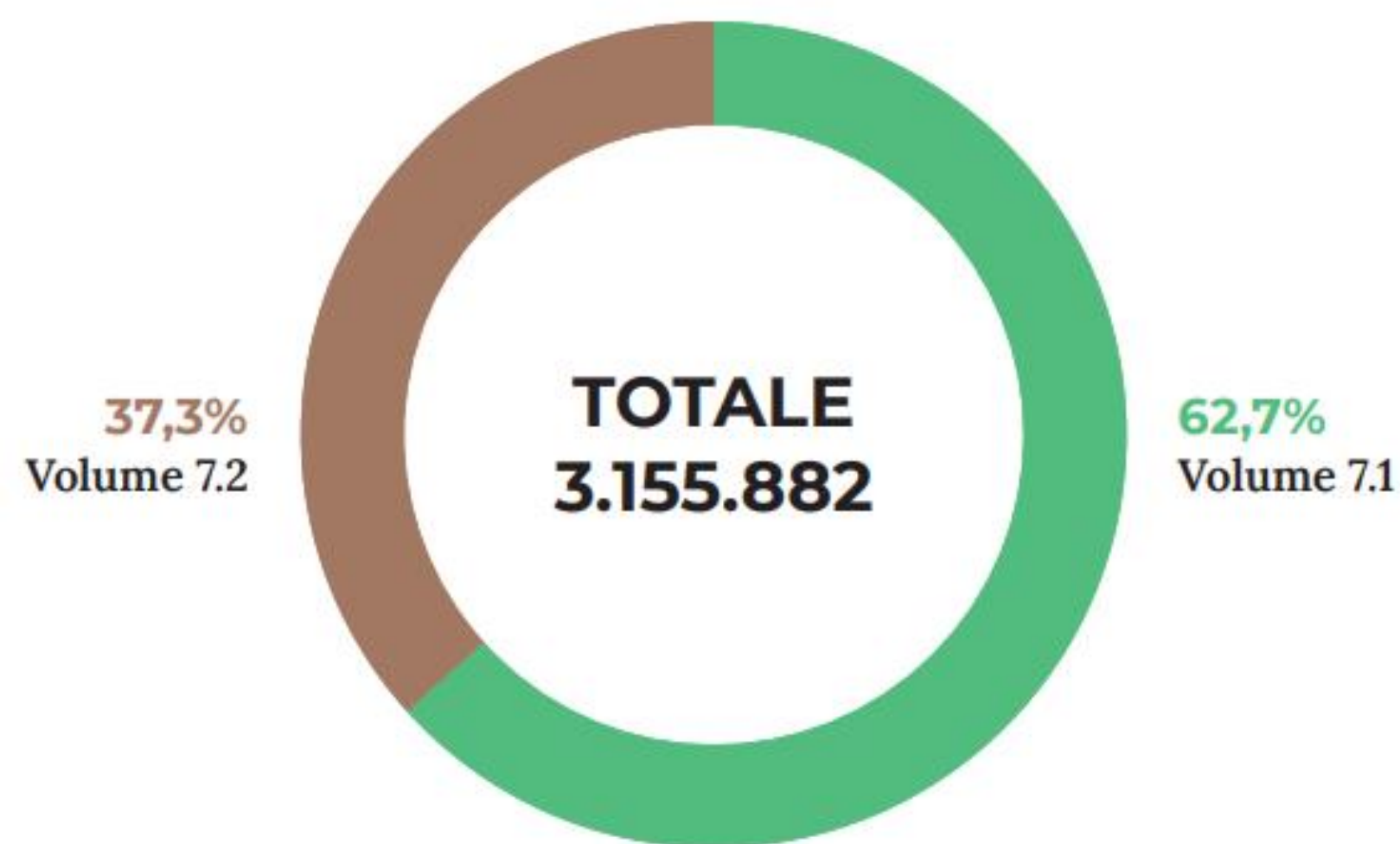
Il prodotto interno lordo italiano nei primi tre mesi dell'anno è aumentato dello 0,5 per cento, mentre quello tedesco è rimasto fermo e quello francese è cresciuto dello 0,2%: ecco cosa succede in Europa



Source: Official Prometeia estimates / December 2022.

FITOK SYSTEM – ISPM 15 - IPPPC/FAO

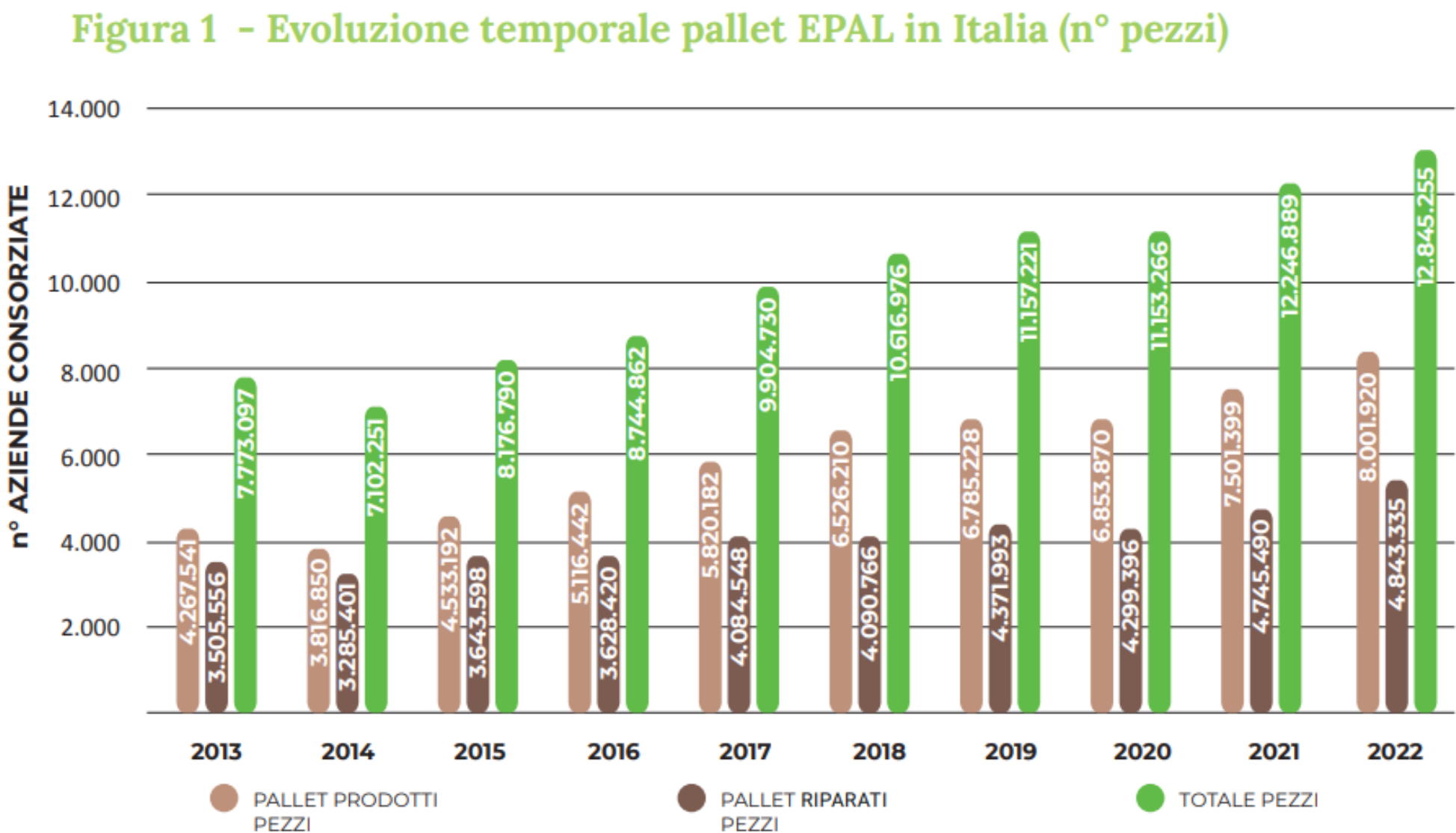
Figura 5 - Volumi dichiarati dai Soggetti Autorizzati 2022 (m³)



VS 2021
+1.5%

JANUARY – MARCH 2023
- 10 %

EPAL ITALIA SYSTEM



VS 2021 + 4,9%

**+6,7% Production
+ 2,1% Repair**

JANUARY – MARCH 2023
Production – 3%
Repair + 12%

JANUARY – MARCH 2023
+ 3 %

EPAL ITALIA SYSTEM

PRODUZIONE (n° pz)



l'Italia incide per il **7,3%** sulla produzione totale di pallet EPAL europea

ANNO 2021



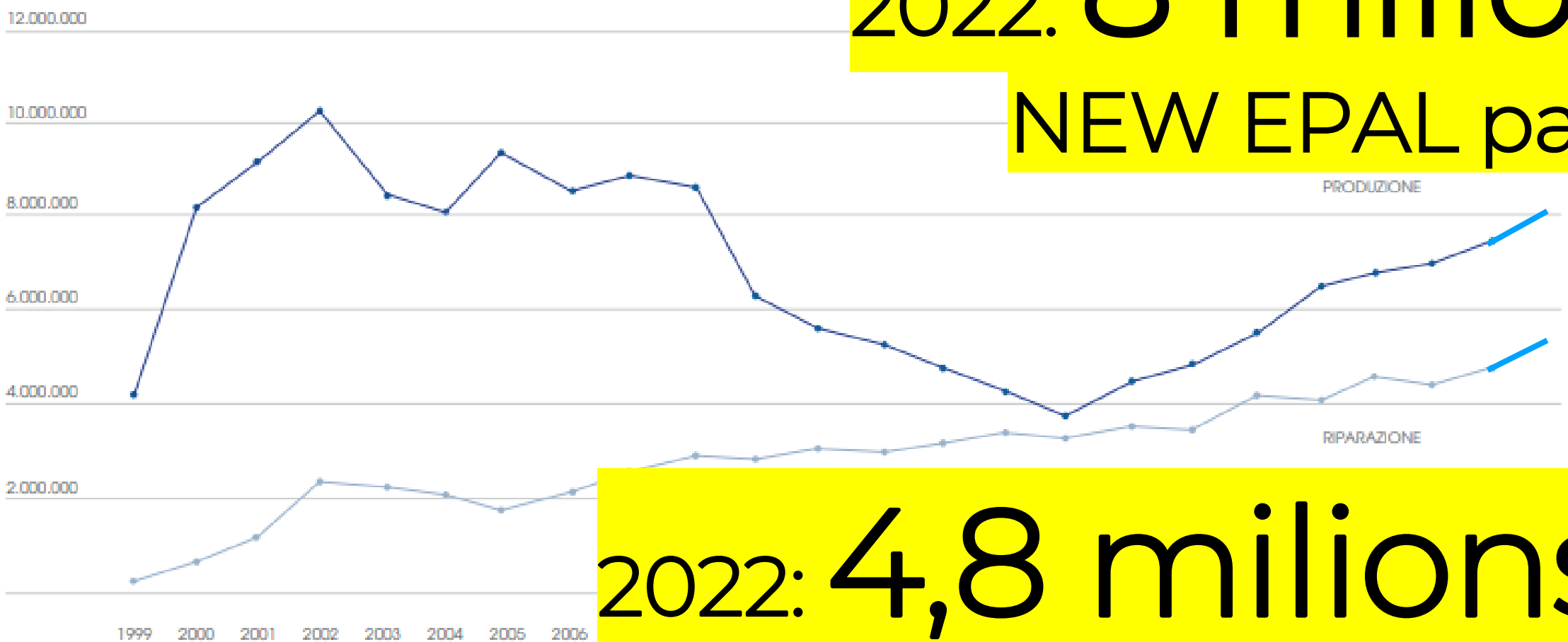
RIPARAZIONE (n° pz)

l'Italia incide per il **17%** sulla riparazione totale di pallet EPAL europea

Numero licenze EPAL in Italia

Anno	N° licenze produttori	N° licenze riparatori
1999	54	18
2000	56	59
2001	58	120
2002	60	133
2003	49	124
2004	45	126
2005	49	120
2006	39	121
2007	47	118
2008	52	129
2009	53	127
2010	47	127
2011	49	139
2012	45	134
2013	44	134
2014	40	120
2015	40	140
2016	40	153
2017	40	171
2018	41	181
2019	41	178
2020	39	178
2021	40	192

Anno	Produzione	Riparazione
1999	4.239.145	65.926
2000	8.222.348	435.484
2001	9.238.851	1.203.532
2002	10.258.342	2.315.377
2003	8.394.352	2.217.160
2004	8.037.267	2.070.964
2005	9.286.261	1.900.907
2006	8.522.683	2.140.212
2007	8.953.042	2.416.469
2008	8.670.663	2.974.201
2009	6.362.528	2.900.912
2010	5.888.393	3.122.712
2011	5.769.694	3.099.763
2012	4.924.946	3.296.376
2013	4.267.541	3.505.556
2014	3.843.849	3.310.453
2015	4.536.352	3.655.425
2016	5.116.442	3.628.420
2017	5.820.182	4.107.129
2018	6.526.210	4.091.421
2019	6.785.228	4.371.993
2020	6.872.900	4.338.574
2021	7.470.725	4.723.452



2022: 8 milioni of
NEW EPAL pallet

2022: 4,8 milioni of
REPAIRED EPAL pallet

FOCUS ITALIA

Oltre 25 anni
di dati
1995 - 2021



Dal 1999 il N° di licenze dei produttori è diminuito del **-25%**

Dal 1999 il N° di licenze dei riparatori è aumentato del **966%**

EPAL ITALIA SYSTEM 2021

Produzione
di pallet
EPAL 1
(800x1200
mm) in tutti
i paesi nel
2021
(n° pezzi)

TOP 5 PRODUZIONE 2021

Germania 35.903.285

Polonia 31.315.750

Italia 7.470.725

Ucraina 6.035.168

Spagna 2.365.761

PRODUCTION 2021

3rd

TOP 5 RIPARAZIONE 2021

Germania 10.522.603

Italia 4.723.452

Francia 3.034.896

Polonia 2.995.448

Svizzera 1.736.251

Riparazione
di pallet
EPAL in tutti
i paesi nel
2021
(n° pezzi)

2021

2nd

REPAIR 2021

««

Produzione
e riparazione
di pallet
EPAL in tutti
i paesi nel
2021
(n° pezzi)

TOP 5 PRODUZIONE E
RIPARAZIONE 2021

Germania 47.144.788

Polonia 34.761.269

Italia 12.309.308

Ucraina 6.075.270

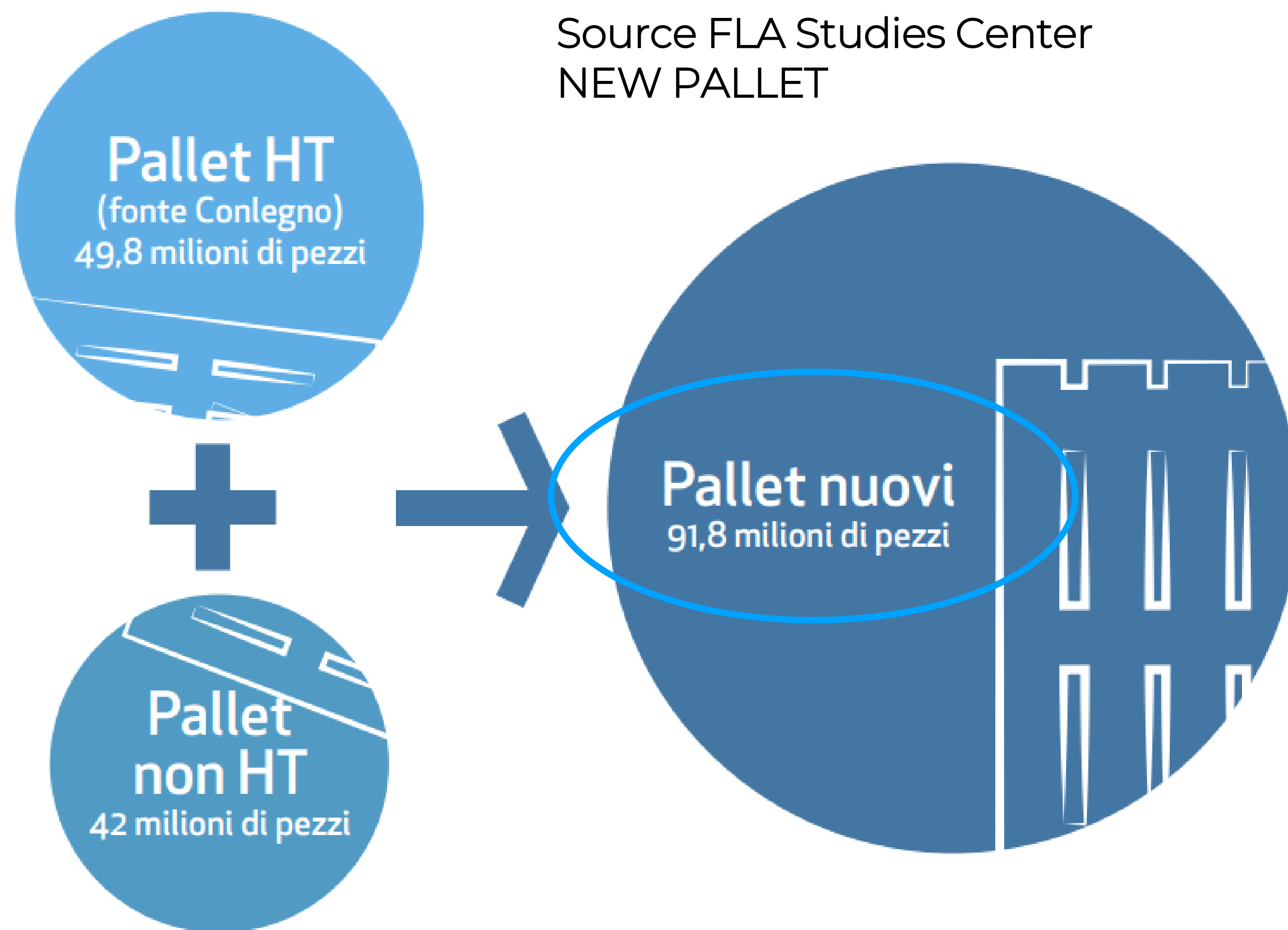
Francia 4.456.972

3rd

PRODUCTION AND REPAIR 2021

ITALIAN MARKET – NEW PALLETS

2018 data
Source FLA Studies Center
NEW PALLET



2022?

MY OPINION

ABOUT 99/101
millions of
new pallets

ITALY: PALLET IMPORTS

ITALY: PALLET IMPORTS 2013 – 2022

ANNO	NUMERO PEZZI	VAR.%
2013	12.216.868	
2014	14.190.922	16%
2015	17.241.993	22%
2016	19.117.014	11%
2017	20.671.110	8%
2018	18.290.255	-12%
2019	21.375.736	17%
2020	21.281.682	0%
2021	27.442.851	29%
2022	23.494.783	-14,4%

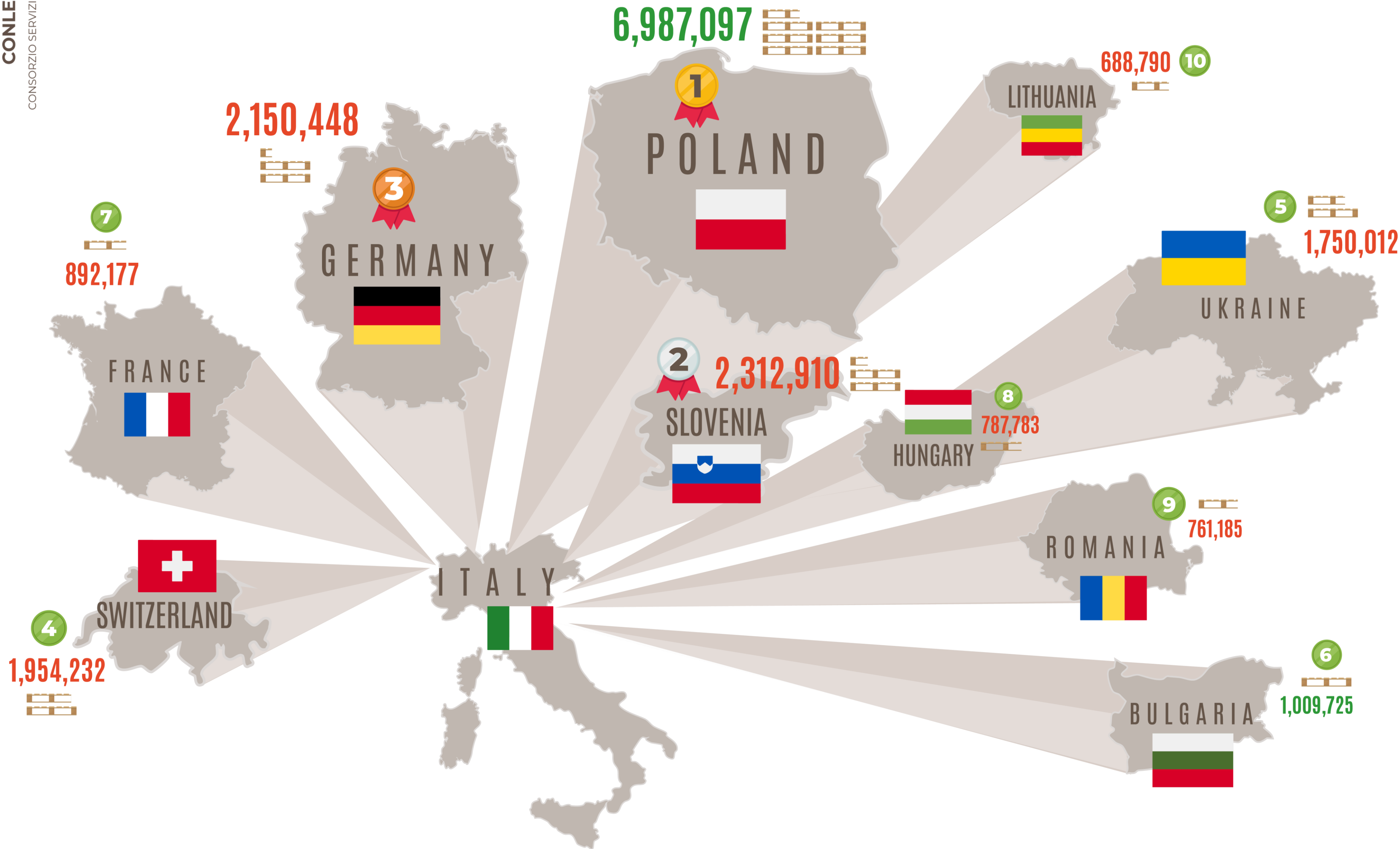
2022

23.494.783 pallet

-14,4%

VS 2021

ITALY: PALLET IMPORTS - 2022



ITALY: PALLET IMPORTS 2022 - January – December 2022

Total Value: 336.4M Euro %Change 40.2% - No. Pieces: 23,494,783 %Change -14.4%

No.	Country	Pieces	% Change
1	Poland	6,987,097	+8.5%
2	Slovenia	2,312,910	-12.3
3	Germany	2,150,448	-25.7%
4	Switzerland	1,954,232	-9.4%
5	Ukraine	1,750,012	-5%
6	Bulgaria	1,009,725	+63.9%
7	France	892,177	-38.2
8	Hungary	787,783	-23.5%
9	Romania	761,185	-0.1%
10	Lithuania	688,790	-27.3%
11	Latvia	638,815	-9.5%
12	Czech Republic	520,974	+1.7%
13	Slovakia	460,276	+17.6%
14	Spain	396,085	-56.1%
15	Albania	381,919	+12.7%
16	Austria	320,762	-79.1%
17	Serbia	257,888	+177.9%
18	Croatia	249,667	-50.2%
19	Netherlands	215,432	-63.2%
20	Belgium	176,092	-40.1%

Red numbers indicate decreased performance, green numbers indicate increased trade flows.

ITALY: PALLET IMPORTS - 2023

Top Paesi

Ordinati per Valore

#	Nome Paese	Valore	Var%	Quantità *	Var%
1	Polonia	8,0M €	-6,65%	532.530	-2,7%
2	Germania	2,5M €	23,88%	170.233	2,8%
3	Slovenia	2,1M €	37,29%	138.352	-11,6%
4	Svizzera	1,4M €	34,90%	181.487	21,5%
5	Francia	1,2M €	72,34%	67.934	-14,2%
6	Ungheria	0,7M €	37,79%	47.601	-22,4%
7	Ucraina	0,7M €	-57,97%	86.022	-50,0%
8	Bulgaria	0,7M €	49,54%	88.026	88,8%
9	Lettonia	0,6M €	7,59%	59.204	4,7%
10	Belgio	0,6M €	322,20%	14.375	59,3%
11	Rep. Ceca	0,6M €	72,64%	51.402	109,8%
12	Romania	0,5M €	-29,84%	39.138	-23,4%
13	Lituania	0,5M €	-5,76%	43.322	-27,9%
14	Croazia	0,4M €	166,13%	25.223	56,2%
15	Austria	0,3M €	70,16%	18.009	34,0%
16	Paesi Bassi	0,2M €	25,69%	12.776	-14,7%
17	Slovacchia	0,2M €	-61,45%	22.600	-39,3%
18	Spagna	0,2M €	11,76%	11.336	-26,7%
19	Albania	0,1M €	-38,58%	18.966	-40,3%
20	Svezia	0,1M €	18,22%	2.014	-57,8%
21	Grecia	0,1M €	66,20%	7.005	25,7%
22	Danimarca	0,1M €	114,62%	4.768	99,6%
23	Serbia	0,1M €	22,77%	11.340	79,3%
24	Bosnia ed Erzeg..	0,1M €	-50,22%	5.604	-42,0%
25	Malta	0,0M €	32,39%	6.767	35,1%

JANUARY 2023
- 4,4%
VS 2022

10 TOP TRADE SOFTWOOD FLOWS IN THE WORLD

TIMBER-ONLINE.net

Media Info

Log Wood

Sawn Timber

Wood Products

Timber Construction

Energy

Econom

The 20 biggest global softwood lumber trade flows | 2022

Trade flows incl. planed timber in 1,000 m³

N.	Exporter	Importer	1-12 2021	1-12 2022	Diff. in %
1	Canada	USA	32,218	30,088	-7
2	Russia	China	12,932	11,894	-8
3	Germany	USA	2,316	2,800	21
4	Austria	Italy	2,722	2,764	2
5	Sweden	Great Britain	2,756	2,399	-13
6	Russia	Uzbekistan	2,134	2,121	-1
7	Sweden	USA	770	1,414	84
8	Sweden	Egypt	867	1,327	53
9	Canada	China	1,789	1,249	-30
10	Finland	Egypt	1,070	1,220	14

TIMBER-ONLINE.net



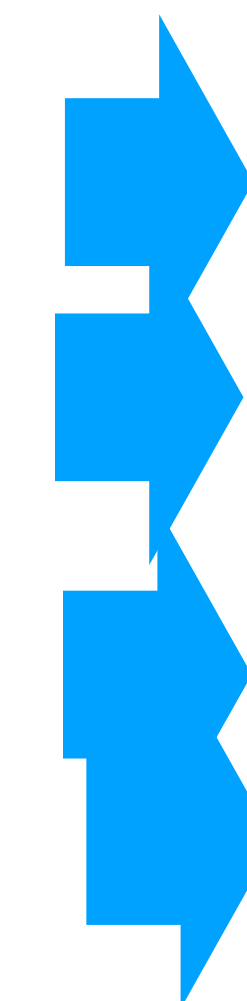
Global softwood lumber trade flows in 2022 (red: trade volumes decreased compared to 2021, green: trade volumes increased) © Timber-online

Red arrows indicate decreased performance, green arrows indicate increased trade flows. To date, this has been the year of greatest flow from Austria to Italy

WOOD MARKET: NEW FLOWS – THE LOG BATTLE



SHIP LOADED WITH LOGS DEPARTING FROM GERMANY TO CHINA



Softwood log imports China | 2017– 2022

Country	2022	2021	2020
New Zealand	17,609,510	20,226,636	15,332,026
Germany	5,627,535	11,723,096	9,966,754
United States of America	1,212,330	3,242,743	1,627,346
Japan	1,114,269	1,213,716	390,392
Canada	908,970	1,321,155	316,918
Czech Republic	879,410	1,584,069	3,382,485
Latvia	613,896	158,137	114,944
Uruguay	562,002	2,006,669	882,988
France	537,796	939,735	565,633
Poland	532,179	653,483	261,778
Other	1,496,958	6,668,825	8,747,731
Total	31,094,855	49,738,264	41,588,995

10 TOP PALLET IMPORTING COUNTRIES IN EUROPE



ITA
LY
6TH

Red numbers indicate decreased performance, green numbers indicate increased trade flows.

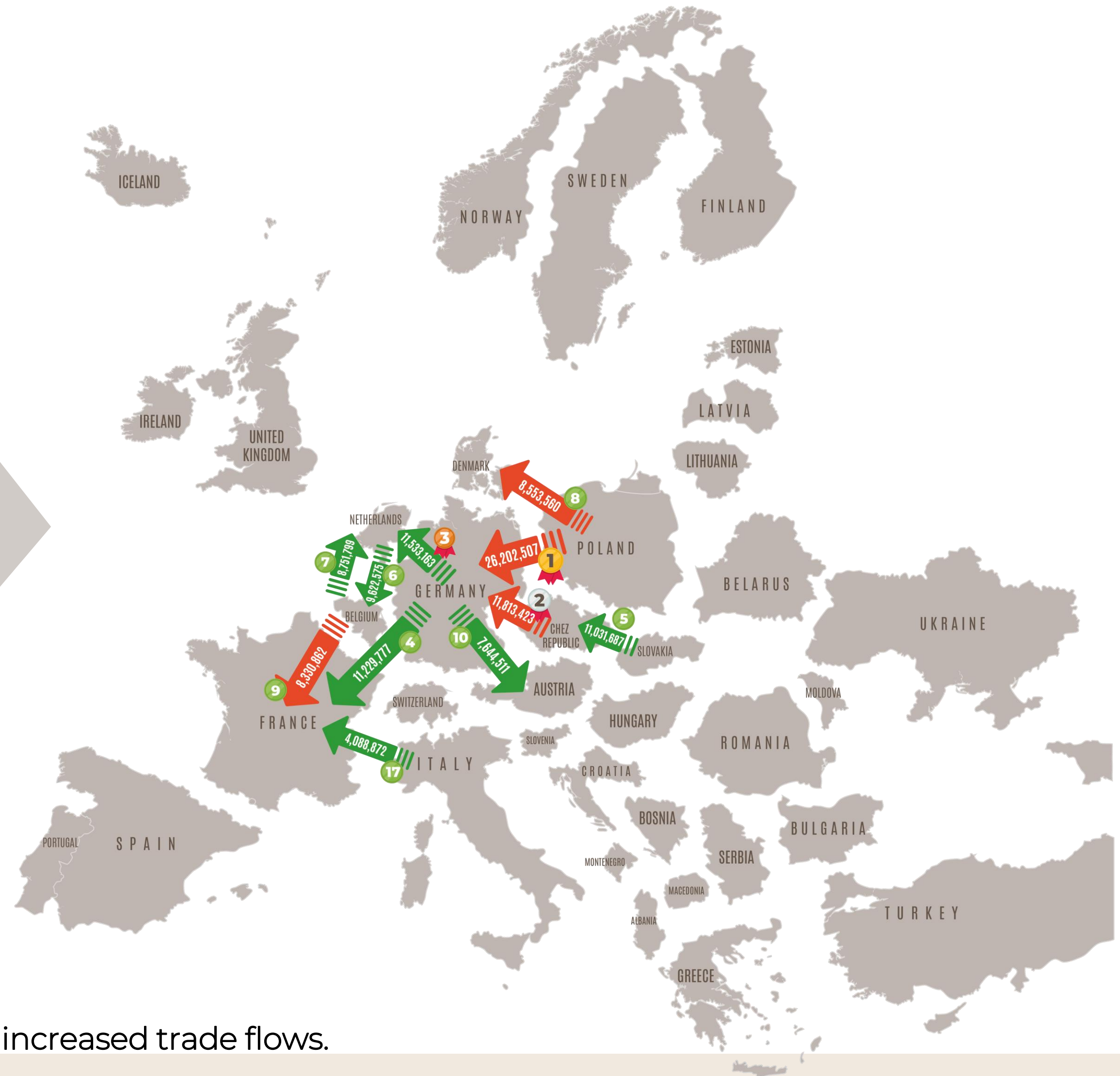
20 TOP PALLET IMPORTING COUNTRIES IN EUROPE

EU PALLET IMPORTS AND No.1 PALLET EXPORTER



	EU COUNTRIES	TOTAL IMPORTED	Change %	No.1 EXPORT COUNTRY	NUMBER OF PIECES
1	GERMANY	66,690,259	-15.2%	Poland	26,202,507
2	NETHERLANDS	41,927,922	+21.9%	Germany	11,533,163
3	FRANCE	36,826,268	-4.7%	Germany	11,229,777
4	BELGIUM	28,700,416	-1.3%	Netherlands	8,751,799
5	CZECH REP.	25,268,701	141.2%	Slovakia	11,031,687
6	ITALY	23,494,783	-14.4%	Poland	6,987,097
7	DENMARK	16,390,809	-52.4%	Poland	8,553,560
8	AUSTRIA	15,864,737	-2.2%	Germany	7,644,511
9	POLAND	15,563,744	+3.8%	Ukraine	4,750,973
10	SWEDEN	10,271,559	-7.2%	Norway	3,109,628
11	SLOVENIA	8,382,666	+72.3%	Ukraine	6,091,103
12	SPAIN	7,491,760	+28.5%	Germany	2,244,587
13	SLOVAKIA	7,475,744	-26.1%	Poland	2,750,233
14	GREECE	7,385,995	+56.3%	Bulgaria	3,096,301
15	HUNGARY	5,922,809	+6.6%	Slovakia	1,047,072
16	ROMANIA	4,757,257	+28.5%	Ukraine	1,036,281
17	LITHUANIA	3,320,691	-8.1%	Poland	1,080,446
18	BULGARIA	2,248,905	+29.8%	Ukraine	708,809
19	CROATIA	2,141,888	+8.3%	Bosnia-Herzeg	443,644
20	LATVIA	2,026,422	-8.1%	Lithuania	877,018

TOP TRADE PALLET FLOWS IN EUROPE



Red arrows indicate decreased performance, green arrows indicate increased trade flows.

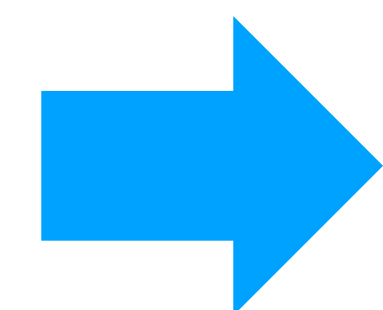
20 TOP TRADE PALLET FLOWS IN EUROPE

EUROPEAN PALLET TRADE: The 20 largest trade flows of pallets between EU countries in 2022

No.	FROM	TO	Number of Pieces	Delta %
1	Poland	Germany	26,202,507	-16.2%
2	Czech Rep.	Germany	11,813,423	-11.6%
3	Germany	Netherlands	11,533,163	+27%
4	Germany	France	11,229,777	+17%
5	Slovakia	Czech Rep.	11,031,687	+1077.8%
6	Belgium	Netherlands	9,622,575	+586%
7	Netherlands	Belgium	8,751,799	+0.8%
8	Poland	Denmark	8,553,560	-60%
9	Belgium	France	8,330,862	-2.5%
10	Germany	Austria	7,644,511	+0.8%
11	Poland	Italy	6,987,097	+8.5%
12	Ukraine	Slovenia	6,091,103	+152.1%
13	Poland	Czech Rep.	6,000,096	+12%
14	Germany	Belgium	5,322,473	-21.1%
15	Netherlands	Germany	4,927,604	-10.8%
16	Ukraine	Poland	4,750,973	+41.1%
17	Italy	France	4,088,872	+100.2%
18	Poland	Netherlands	4,051,930	-27.3%
19	Ukraine	Germany	3,777,044	+80.7%
20	France	Belgium	3,593,931	+16.2%

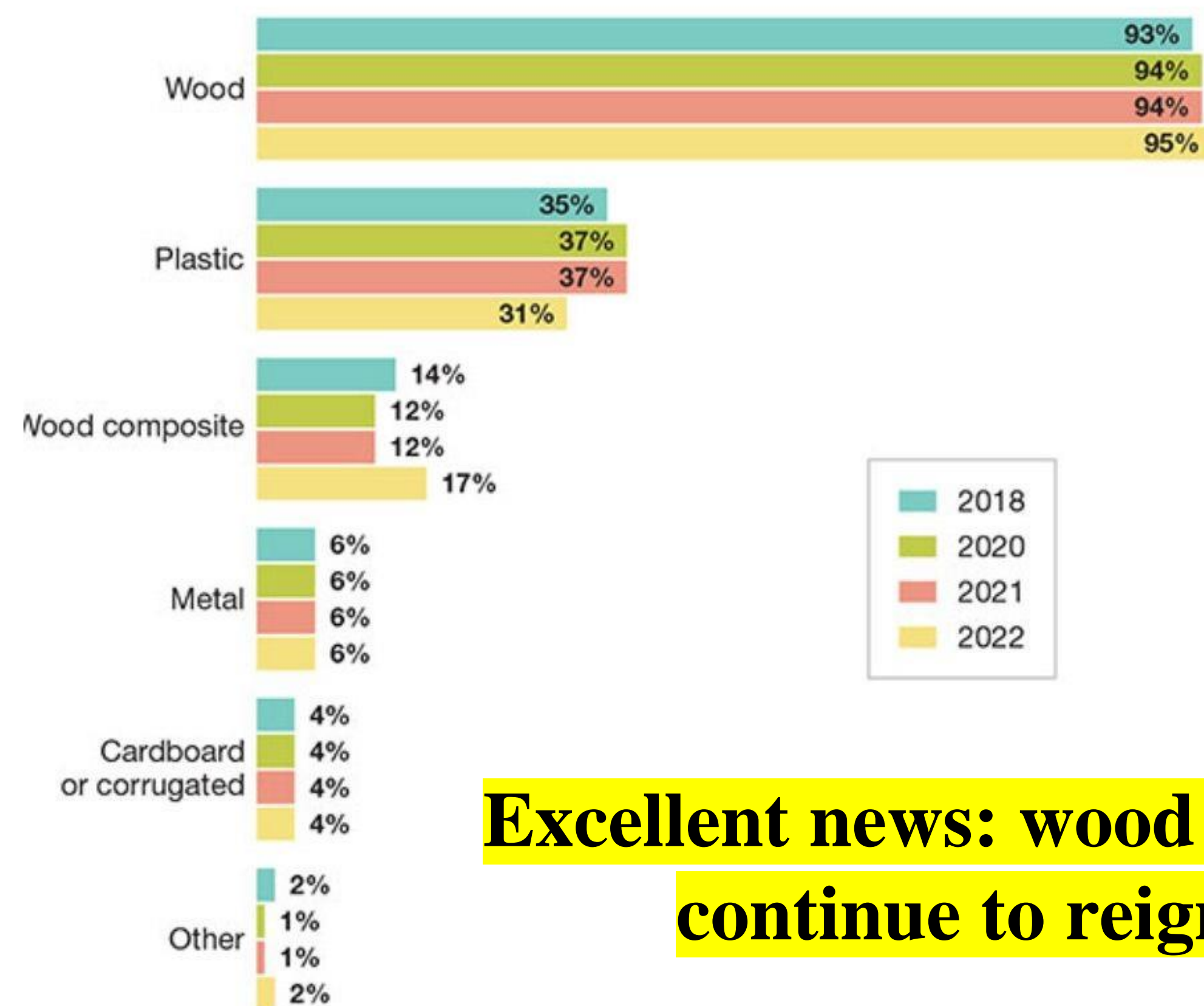
EUROPEAN PALLET TRADE: The 10 largest trade flows of pallets between EU countries in 2022

No.	FROM	TO	Number of Pieces	Delta %
1	Poland	Germany	26,202,507	-16.2%
2	Czech Rep.	Germany	11,813,423	-11.6%
3	Germany	Netherlands	11,533,163	+27%
4	Germany	France	11,229,777	+17%
5	Slovakia	Czech Rep.	11,031,687	+1077.8%
6	Belgium	Netherlands	9,622,575	+586%
7	Netherlands	Belgium	8,751,799	+0.8%
8	Poland	Denmark	8,553,560	-60%
9	Belgium	France	8,330,862	-2.5%
10	Germany	Austria	7,644,511	+0.8%

17TH

12th ANNUAL REPORT ON PALLETS

ANNUAL SURVEY BY PEERLESS RESEARCH GROUP HIGHLIGHTS THE CURRENT AND EXPECTED USE OF PALLETS IN LOGISTIC CENTERS, IN ADDITION TO OTHER TRENDS UNDERWAY IN THE PALLET MARKET



**Excellent news: wood pallets
continue to reign**

Source: Peerless Research Group (PRG)



World record in France on a domino made from pallets (my congratulations to our French colleagues on this initiative)

WOOD MARKET: INTERNATIONAL SCENARIOS

Consumi di legname ad uso industriale (milioni di m³)

Primary processed wood products basic outlook 2050		Volume 2020 (million m ³)	Volume 2050 (million m ³)	Percentage change 2020-2050
Segati	Sawnwood	929	1 205	3
	Veneer/plywood	267	539	102
Tranciati e compensati				1.744 (56%)
Pannelli	Particle/fibreboard	345	593	72
Paste				1.379 (44%)
	Wood pulp*	745	786	5
Total		2 286	3 123	37

Sources: Authors' own elaboration based on FAOSTAT Forestry 1990 and 2020, GFPM 2050 simulation, United Nations World Population Prospects 2019, Medium fertility variant, 2020-2100; United Nations World Urbanization Prospects: The 2018 Revision, and Textile Exchange, 2021. Preferred Fiber & Materials – Market Report. Textile Exchange.

*According to GFPM, paper consumption will increase by 40 percent by 2050. Raw material will be increasingly wastepaper, which is estimated to grow by 66 percent (Annex 8.6).

Fonte: FAO, GFSO 2050 (2022)

WOOD MARKET: INTERNATIONAL SCENARIOS

5 settori strategici della bioeconomia

(senza considerare gli impieghi energetici)

- *Engineered wood products*

Cross-Laminated Timber (CLT or X-LAM): +37% crescita annuale (2014-20), NLT, glulam, CLT, MPP, LVL, ...



- *ManMade Cellulose Fibre (MMCF) -*

prodotti biotessili: 6,4% del mercato attuale (viscosa, lyocell, TENCE, modal, ...); fibre sintetiche 60%; cotone 26%



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- Pannelli, schiume e isolanti



- Bio-plastiche e PWC (*Plastic-Wood Composite*)



- *Packaging*



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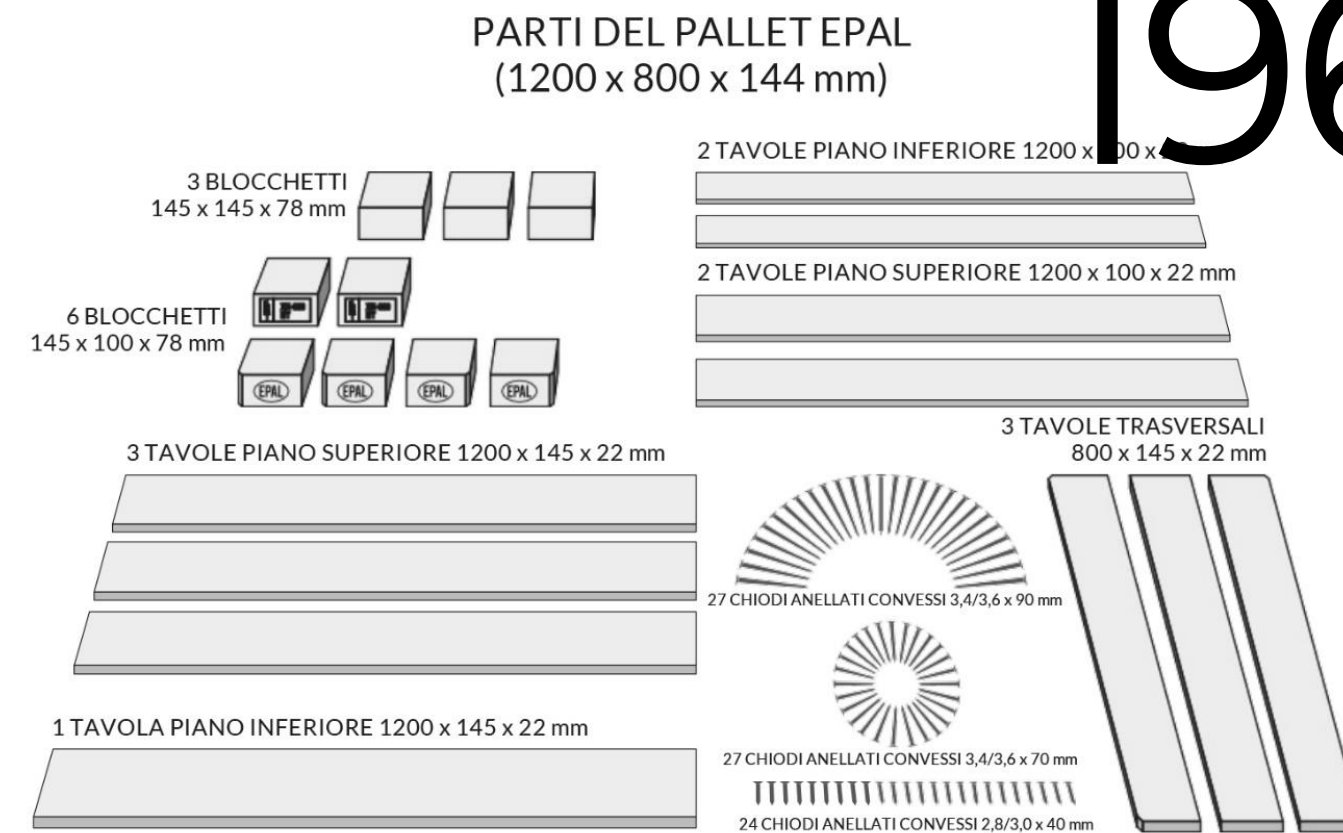


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WILL THERE BE ENOUGH
WOOD IN EUROPE FOR THE PALLET
SECTOR IN THE FUTURE ?



THE FEW THINGS IN MY LIFE THAT HAVE NOT CHANGED



1961

1955

