the market and hence play a less important role in value-added products and hardwoods. However, because all three are also strong at the wholesale and retail level, they are a major force in the industry.

The estimated market share of softwood imports, in cubic metres, is as follows:

• Pinault	500,000
• Becob	500,000
• Poliet/Point-P	200,000
• Iggesund	100,000
• Schumann	70,000
• Others	630,000
Total	2,000,000

Note that Iggesund is part of the Swedish forest product group of the same name.

Joinery Companies. Consolidation and integration has led to changes in the structure of joinery companies as well. The Syndicat national des fabricants de menuiserie industrielles, with 32 members, represents the principal manufacturers of doors, windows, shutters, staircases and fencing. However, three of the member firms – Lapeyre, Saferm and Gimm – are members of the Poliet group.

Lapeyre and Gimm are the undisputed leaders of the industry with 1989 sales estimated at FF 1,700 million (Lapeyre) and FF 650 million (Gimm). The next largest company is estimated to have sales of FF 200 million to FF 300 million. Lapeyre now controls six factories that sell solely to corporate outlets. Annual uptake is estimated at 140,000 to 150,000 m³.

Agents and Sales Offices. Most companies work with agents, although some, including Seaboard, have their own sales offices. The Swedish and Finnish Timber Council identify 21 leading agents, which are listed in the appendix to this report. Of these, at least three also represent major Canadian exporters – Fletcher Challenge, Westar Timber and Balfour Guthrie.

3.2 Germany

3.2.1 Market Dynamics

Germany is the largest consumer of coniferous sawnwood in the EC and ranks behind France, but level with Italy, in consumption of non-coniferous products. Domestic production of both sawnwood categories is also high, estimated at 10 million m³ of coniferous and 2 million m³ of non-coniferous in 1988. The short-term supply of domestic wood has also increased significantly because of the large number of storm-felled trees during the winter of 1989-90. The substantial German forests consist mostly of spruce (43%), pine/larch (22%), beech (17%) and oak (9%).

The German import market is the second largest in Europe for both categories of sawnwood. As indicated in tables 3 and 4, in 1988 imports of coniferous were almost 4.7 million m³, representing 33% of the market; imports of non-coniferous sawnwood were about 1 million m³, representing 37% of the market.

The domestic production, supplemented by imports from Austria and Eastern European countries, largely satisfies the lower-quality demand, such as for construction grades. Thus, imports from other countries tend to be of higher quality. As indicated in Table 5, Canada only had a 5% share of coniferous imports in 1988, while 45% were from Finland and Sweden, and 16% from the U.S.S.R. Most of the Canadian imports are reported to be hemlock, spruce and cedar lumber, and semi-finished products for remanufacturing. An estimate of German softwood use is presented in Table 12.

Table 12
Germany: Estimated Softwood Use

Uptake Area	Use*	Volume (million m³)
Construction	70%	9.9
Joinery	20%	2.8
Packaging	10%	1.4
Total	100%	14.1

*Henley International estimates, June 1990.