**EFNA country reports 2024 part one.**

|  |
| --- |
| **Weather condition:** |
| **Austria**  **Dry summer, very early snow in end of November; very early warm weather in spring, 3-4 weeks earlier growing of plant; also 3 weeks shorter season**  **Belgium**   |  | | --- | | **Climatological overview 2023**  **The second longest drought period since the start of the observations was recorded in 2023. Not a drop of precipitation fell between May 16 and June 16. Irrigation was necessary to start cultivation of young plants. Last year we registered two heat waves. A first one in June (8-17 June) and a second one in September (4-11 September). From July 15, the persistent heat period was over, meaning that no further irrigation was necessary. The heat wave in September in particular was very remarkable: it was the first heat wave during autumn (measurements since 1892).**  **An average of 1011 mm of precipitation fell in Belgium (normal: 837 mm). This mainly fell in the period 15/10-31/12, which meant that the fields were no longer accessible in that period. Seedbeds sown in September were flooded several times during the winter. Due to the bad weather, autumn sowing was postponed until spring 2024. The lifting of forest trees was exceptionally difficult throughout the winter. In mid-January 2024 we had a week of frost, the only one of the winter. During the spring of 2024, field conditions were not ideal due to wet weather. Plantings were postponed or carried out in less favorable conditions.** |   **Czechia**  **From the middle of January, a very mild and wet winter. Forest plants started to grow 3 weeks earlier than last year.**  **Denmark**  **The most rain full season in history it has been rain from beginning of October until end up April and it have been impossible condition for working in the nursery and for our customer as well**  **Some nurseries have really big problems**  **FRANCE**  **Very rainy Season. A lot of customer projects will be reported to 2024-2025 season.**  **GERMANY**  **Hungary**  **Extremely wet Spring**  **Iceland**  **Ireland**  **The first six months of 2023 were drier than normal except for March which was wetter than usual. However, after a warm dry May and June, the remainder of the 2023 was very wet. Lifting conditions during the 2023/24 season have been the wettest and most difficult experienced for several years. Seed sowing has also been delayed due to continuing poor weather and unworkable soil conditions.**  **The Netherlands**  **Norway**   |  | | --- | | **2023: Vinter: snow and cold; good,**  **spring: to cold,**  **summer; ok,**  **autumn: cold and snow; good.** |   **Portugal**  **Sweden**  **We had a normal spring 2023 with a very dry and warm June. The rest of the summer and autumn 2023 was colder and rainier than usual. We had early snow in the autumn in the northern part of the country. The year ended with an overall cold and long winter. Spring of 2024 have had a later start of the planting than usual in some regions.**  **United Kingdom**  **We had an extremely wet summer, autumn and winter, and only at the beginning of April 24 did the rain stop and allow the ground to start drying for lifting and sowing. The whole of the UK was affected with many areas receiving 50% more rain than normal.**  **This made lifting of bareroot trees extremely difficult and significant delays arose for customers, with nurseries not having plants in coldstore to despatch from and struggling to deliver fresh lifted trees straight from the field.**  **Even now although the weather is improved, extreme thunderstorm and flooding are causing trouble. Sowings are running late.** |

|  |  |  |
| --- | --- | --- |
| **INTERNAL MARKET, forest (summer 2023 to spring 2024):**  **Austria**  **Less than 2022-2023; the early snow in Nov./Dec. shortened the autumn season. The weather conditions in spring had been very good but much too early.**  **Belgium**   |  | | --- | | **Flanders has planted 5,6 million trees since 2019. This means 1,800 hectares of new forest. But hat is less than 50 percent of the ambition of 4.000 hectares that the government wanted to achieve by 2024. New plantings were very difficult or could not be carried out due to extreme wet weather conditions during November 2023-March 2024. Many planned plantings have been postponed until next winter because the fields were not accessible. As a result, a lot of forest planting material has remained unsold. Hopefully postponement is not a cancellation. These circumstances quickly put pressure on sales prices.** |   **Czechia**  **Good market for conifers, decreasing demand for broadleaves. Decline of demand for forest seedlings.**  **Denmark**  **The market for plants has been good, but the weather conditions has entailed that the delivering for plants has been lesser than forecasted**  **France**  **2021-2022: 60 million**  **2022-2023: 60 million**  **2023-2024: Not known**  **France's ambition to plant 1 billion trees by 2030 is clearly not realistic.**  **There is not a national planning.**  **Surcapacity production and the very rainy season will lead to an anormal level of destruction of plants.**  **Germany**  **Hungary**  **Relatively good market season, mixed species sold well. Oak market has problems, national overproduction in Quercus 1/0, 2/1 market. In the market of alnus glutinosa could be seen also some overproduction.**  **Iceland**  **Ireland**  **Demand for forest planting stock continues to decline. Disappointing demand in the autumn continued into spring 2024. A combination of environmental regulations, strong demand for land from other agricultural enterprises, and the rising cost of land has negatively affected the planting of new forests. Despite increased financial incentives to make it financially more attractive for landowners to plant, only c. 1,650 ha of new forests were planted last year (Government target is 8,000 ha per yr.). Proportionally demand for broadleaves species is increasing, with public opinion favouring the establishment of more broadleaf forests using native species. Additional requirements to incorporate more broadleaves onto sites when replanting after clear-felling is also influencing the species mix requirements.**  **The Netherlands**  **Norway**   |  | | --- | | **Very good, high demand after forest plants. Every company sold out their production.** |   **Portugal**  **Sweden**  **Stable market. Main focus on Pine and Spruce. Increase demand for Birch and Larch, but still in low volumes.**  **United Kingdom**  **The demand for trees was strong, with nurseries not having an oversupply of plants (for a change!).**  **The difficulties caused by the weather, as above, made it very difficult for nurseries to meet this demand on time.**  **Customers became very frustrated.** |
| **INTERNAL MARKET, forest (forecast for next season):**  **Austria**  **We expect better season as the actual season; some areas in the forests have been damaged in Dec. 2023 because of heavy snow, treetops have been broken; some areas still have not been cleaned up; the bug beetle has been coming very early and we expect damage caused by bug beetles during the sprint/summer; so maybe this can increase the sales in the next season**  **Belgium**   |  | | --- | | **The postponed planting projects must be planted during the winter 2024-2025. This will cause demand to increase slightly compared to last winter. To date (elections in June 2024), the government remains ambitious to achieve the forest plantation targets.** |   **Czechia**  **We anticipate the drop in demand for forest trees, about 15 %. In Czechia starts to be overproduction.**  **Denmark**  **A lot of new forest is coming up for the coming season and the main species will be sold out and compared with lesser seed/plants**  **France**  **Low oak acorn harvests and lack of national planning will lead to a decline in the market.**  **Germany**  **Hungary**  **It is likely that the “oak problem” will continue, with propagating material (acorn) becoming increasingly difficult to obtain. The small seed collection is also a problem, like Pinus species…**  **Iceland**  **Ireland**  **Regarding afforestation, the outlook remains uncertain with many in the industry currently not expecting an uplift in new areas of commercial forest being planted. Some do expect an increase in small areas of broadleaves to be planted. With respect to reforestation, landowners with maturing forests have generally been waiting for timber prices to improve before harvesting so demand from this section of the market is difficult to predict. However, after much political pressure a new financial package has recently being announced to help landowners with diseased ash plantations to clear and replant these sites. This will help create some extra demand for planting stock over the next few seasons.**  **The Netherlands**  **Norway**   |  | | --- | | **Very good, high demand after forest plants. Every company will sow in more plants.** |   **Portugal**  **Sweden**  **Stable market. Main focus on Pine and Spruce. Increase demand for Birch and Larch, but still in low volumes.**  **United Kingdom**  **We had expected next year to have very strong demand – however it will now be uncertain due to 2 Government policy changes.**   1. **New UK Forest Certification rules have reduced the maximum % of a single species to 65% (from 75%) in a Planting area. This is likely only to impact Sitka spruce and may mean there will be oversupply of SS, as plants were sown long before this change. This change is to increase diversity and resilience of forests.**   **2 The Scottish Government had a budget crisis and had to make large savings. One of their big savings was to cut the grant support for new planting for the 24/25 planting season by 40%!!! This is a big blow when the industry has worked hard to increase planting area over recent years. Government targets were increased, the nurseries even received some grants to help expansion of production. Nurseries had expanded production accordingly, but now Surplus plants may well arise in the nurseries – not what anyone wants.**  **(These changes were announced too late to allow changes to sowing plans as seed was already bought and production had started for many species.)**  **In England tree planting grants have been increased which is positive, however there is still a reluctance to plant trees on better quality land.**  **The hedging market is strong in England.** |
| **INTERNAL MARKET, landscaping, garden center (summer 2023 to spring 2024):**  **Austria**  **Belgium**  **Landscapers & garden contractors: sales of plants remain at the same level. Plantings of gardens or green projects were delayed due to the very wet weather during the winter 2023-2024.**  **Garden centers: customers make smaller purchases in general (smaller pot/plant sizes). There were less purchases due to extreme wet weather in Autumn 2023 and Spring 2024. This keeps pressure on the market.**  **Czechia**  **NO relevant information.**  **Denmark**  **Landscaping has been good, there has been some changing structure in the garden center and some old garden center has problems, but all over its back to 2019**  **France**  **Germany**  **Hungary**  **We are having a definitely good market year. Turnover is increasing year by year in the ornamental sector. Due to the emerald thuja devastation, the demand for alternative species increasing steadily.**  **Iceland**  **Ireland**  **A separate Government incentive called Agri-Climate Rural Environmental Scheme (ACRES) which included incentives to encourage the planting of new Crataegus hedgerows on farms was very popular with demand for plants outstripping supply. A large portion of the planting stock was imported which created a significant amount of negative press due to the possibility of bringing in harmful diseases or pests as the fall out of ash dieback continues.**  **The Netherlands**  **Norway**  **Portugal**  **Sweden**  **No information**  **United Kingdom**  **We do not have much information on this sector., but from what we see and hear we think demand and supply is similar to other years.**  **We do know the weather has also affected the Amenity market demand because construction work has been delayed and plant sales in the Garden Centers has been slow because of the wet Spring.** |

|  |
| --- |
|  |
| **EXPORT MARKET (summer 2023 to spring 2024):**  **Austria**  **No major changes**  **Belgium**  **In general prices were under pressure. The market can generally be compared to the situation in 2019. Turnover is lower than in 2021 and 2022.**  **The selling season was characterized by later orders with lower volumes per order. There were far fewer plantings in the Netherlands, UK and BE, mainly due to the bad weather. There was also less demand in Germany. Since January, prices have come under pressure, prices have fallen and certain purchases have not been received.**  **Czechia**  **Minimal.**  **Denmark**  **It has been good for the main species, but for the hedge plants it has been decreasing**  **France**  **Germany**  **Hungary**  **Decreasing tendency. The demand in Populus tremula and Alnus glutinosa is decreasing. However, the demand for admixing species (wild cherry, Sorbus var, Tilia etc..) is increasing/or could increase, but in these species we have also seed collection problem.**  **Iceland**  **Ireland**  **A few growers in previous years used to export plants, mainly to Scotland where demand was strong, and this helped offset poor demand at home. However, exports into this market have all but stopped due to a falloff in demand from Scotland.**  **The Netherlands**  **Norway**  **There is a demand for Spruce and Pine from Norway to Sweden**  **Portugal**  **Sweden**  **Low volume exported from Sweden.**  **United Kingdom**  **It is difficult to export, both to the EU and even to Northern Ireland.**  **Export reduced due to:**   * **lack of plants available to export.** * **Haulers not liking the export experience of delays and extra paperwork, due partly to Brexit, and partly to new EU PH requirements. Most haulers (other than dedicated, specialist plant haulers) are therefore refusing to transport plants abroad.**   **Overall, very little is exported from the UK.** |
| **EXPORT MARKET (forecast for next season):**  **Austria**  **No major changes**    **Belgium**  **Market situation will depend on the weather conditions during the coming winter. Can the governments realize their ambitions regarding the promised areas of forest plantations? Finding sufficient (suitable) plots to plant forests apparently poses a problem.**  **Czechia**  **Minimal.**  **Denmark**  **There will be leaser demand for the main species**  **France**  **Germany**  **Hungary**  **Difficult to forecast, but we think that the containered FRM seedling’s market will increase, and we will have problems on the seed market.**  **Iceland**  **Ireland**  **Generally, no nurseries plan on producing stock for export and will only do so if internal demand doesn’t materialise and opportunistic sales arise.**  **The Netherlands**  **Norway**  **There is a demand for Spruce and Pine from Norway to Sweden**  **Portugal**  **Sweden**  **Low volume exported from Sweden.**  **United Kingdom**  **As above, and it is unlikely to change until EU / UK rules relax, change, or improve.** |