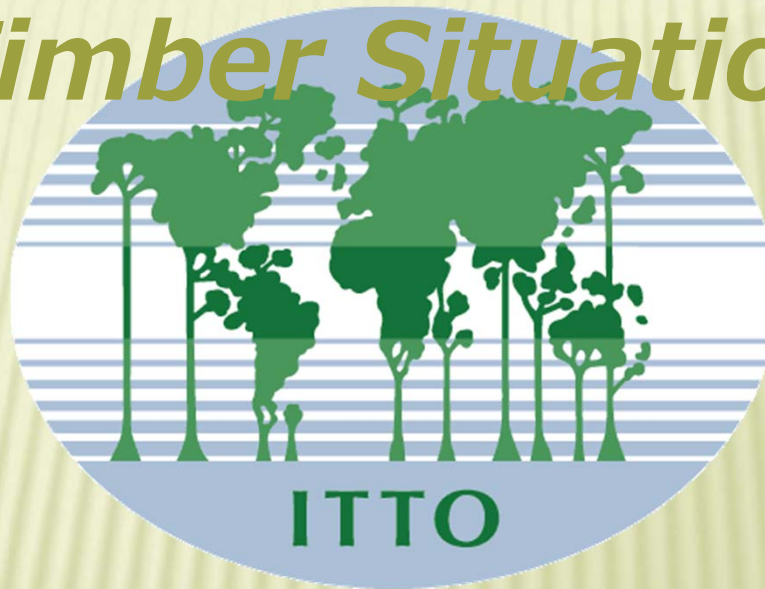


# Selected Data and Analysis from Elements for the ITTO *Biennial Review and Assessment of the World Timber Situation*

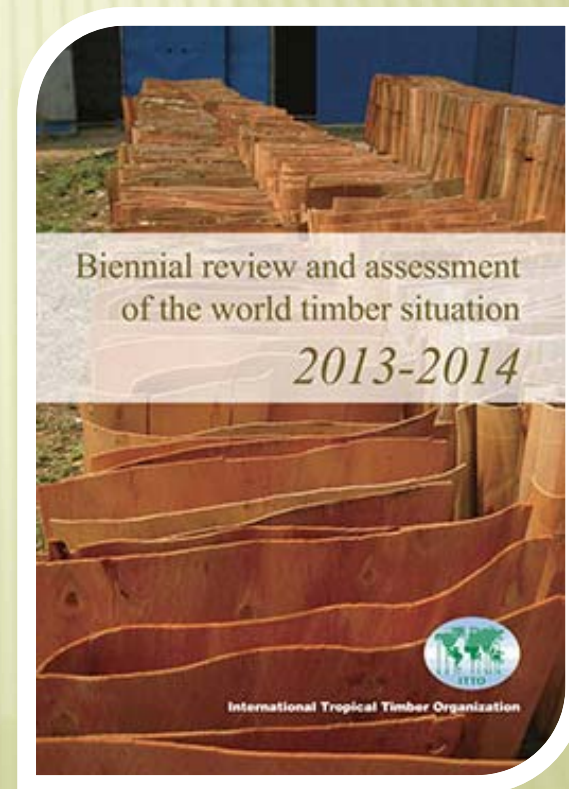


Jean-Christophe Claudon  
ITTO Statistical Assistant



# THE BIENNIAL REVIEW AND ASSESSMENT OF THE WORLD TIMBER SITUATION 2013-2014

- 1) **Preparation of the Review**
- 2) **Long-term Analysis**
- 3) **2015**







## PREPARATION OF THE REVIEW/QUESTIONNAIRE (1)

It is based on the Joint Forest Sector Questionnaire (JFSQ) jointly prepared with the FAO, UNECE and the Forest Questionnaire:

- is sent to 190 countries in the world,
- is revised once a year during the Intersecretariat Working Group
- gathers information on around 80 products
- has specific parts for different organizations (ITTO1 in which we are asking forecasts for the



		ROUNDWOOD REMOVALS		Quantity	Quantity
C	ROUNDWOOD				
NC	Coniferous		1000 m <sup>3</sup>		
1	Non-Coniferous		1000 m <sup>3</sup>		
1C	WOOD FUEL (INCLUDING WOOD FOR CHARCOAL)		1000 m <sup>3</sup>		
1NC	Coniferous		1000 m <sup>3</sup>		
2	Non-Coniferous		1000 m <sup>3</sup>		
2C	INDUSTRIAL ROUNDWOOD (WOOD IN THE ROUGH)		1000 m <sup>3</sup>		
2NC	Coniferous		1000 m <sup>3</sup>		
2.1	Non-Coniferous		1000 m <sup>3</sup>		
2.1C	SAWLOGS AND VENEER LOGS		1000 m <sup>3</sup>		
2.1NC	Coniferous		1000 m <sup>3</sup>		
2.2	Non-Coniferous		1000 m <sup>3</sup>		
2.2C	PULPWOOD, ROUND AND SPLIT		1000 m <sup>3</sup>		
2.2NC	Coniferous		1000 m <sup>3</sup>		
2.3	Non-Coniferous		1000 m <sup>3</sup>		
2.3C	OTHER INDUSTRIAL ROUNDWOOD		1000 m <sup>3</sup>		
2.3NC	Coniferous		1000 m <sup>3</sup>		
	Non-Coniferous		1000 m <sup>3</sup>		
		PRODUCTION		Quantity	Quantity
1	WOOD CHARCOAL		1000 m <sup>3</sup>		
2	WOOD CHIPS, PARTICLES AND RESIDUES		1000 m <sup>3</sup>		
1	WOOD CHIPS AND PARTICLES		1000 m <sup>3</sup>		
2	WOOD RESIDUES (INCLUDING WOOD FOR AGGLOMERATE)		1000 m <sup>3</sup>		
1	WOOD PELLETS		1000 m <sup>3</sup>		
2	OTHER AGGLOMERATES		1000 m <sup>3</sup>		
	SAWWOOD		1000 m <sup>3</sup>		



## PREPARATION OF THE REVIEW/QUESTIONNAIRE (2)

### Data challenges:

**Answer rate.** It has been stable in 2014 and 2013 (57/77 questionnaires in 2014, 61/77 questionnaires in 2013) ratio of 70%-80%. This is an improvement from the previous years (54 in 2012, 55 in 2011).

**Quality:** Production data is difficult to collect.

37% of our production data is repeated data for the period 2010-2014

(607 records/1640 records).

21% of our production data is estimated data for the period 2010-2014

(348 records/1640 records).

~40% of the production data comes from the questionnaire.

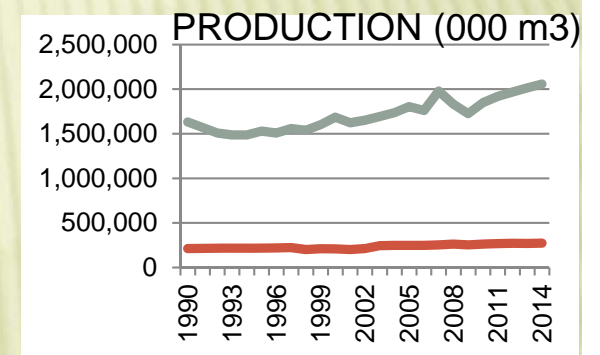
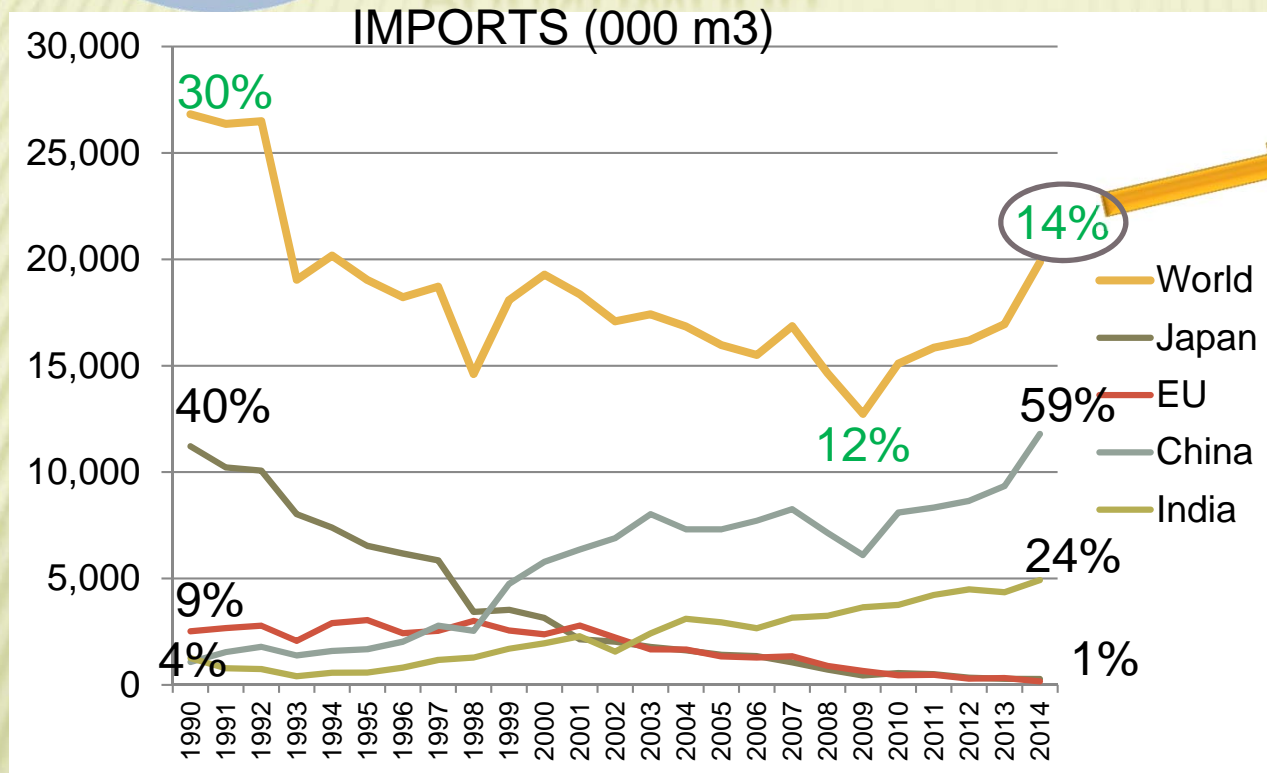
**Trade: relatively easier to collect.** Only 7% of the trade data is repeated and 96% of this repeated data concerns last year. We have a lot of complementary data from COMTRADE which is the official trade database from the UN

Publication	2,508	1,789	1,660	905	42	57	28	8
UNIT VALUE	159	207	333	441	591	427	409	512
Colon -1.2.NC.1 -EXD	previous volume (146.17244981) repeated for	previous volume (2163.003CB) repeated for	previous volume (1241.568CB) repeated for		previous volume (85.983CB) repeated for		previous volume (21.862CB) repeated for	
Comtrade ID	266	74	TR		JQ2014			
					U.V.			
COMTRADE	2,508	1,789	1,660	905	42	57	28	8
COMTRADE UNIT VALUE	159	207	333	441	591	427	409	512
BACKWARD COMTRADE	1,861	1,729	1,747	3,173	363	57	3,412	
BACKWARD COMTRADE UNIT VALUE	378	407	316	126	68	427	3	
FAO	1,860	2,162	1,742	905	90	47	19	
FAO UNIT VALUE	378	325	317	441	274	513	506	
ITTO Publication	2007	2008	2009	2010	2011	2012	2013	2014





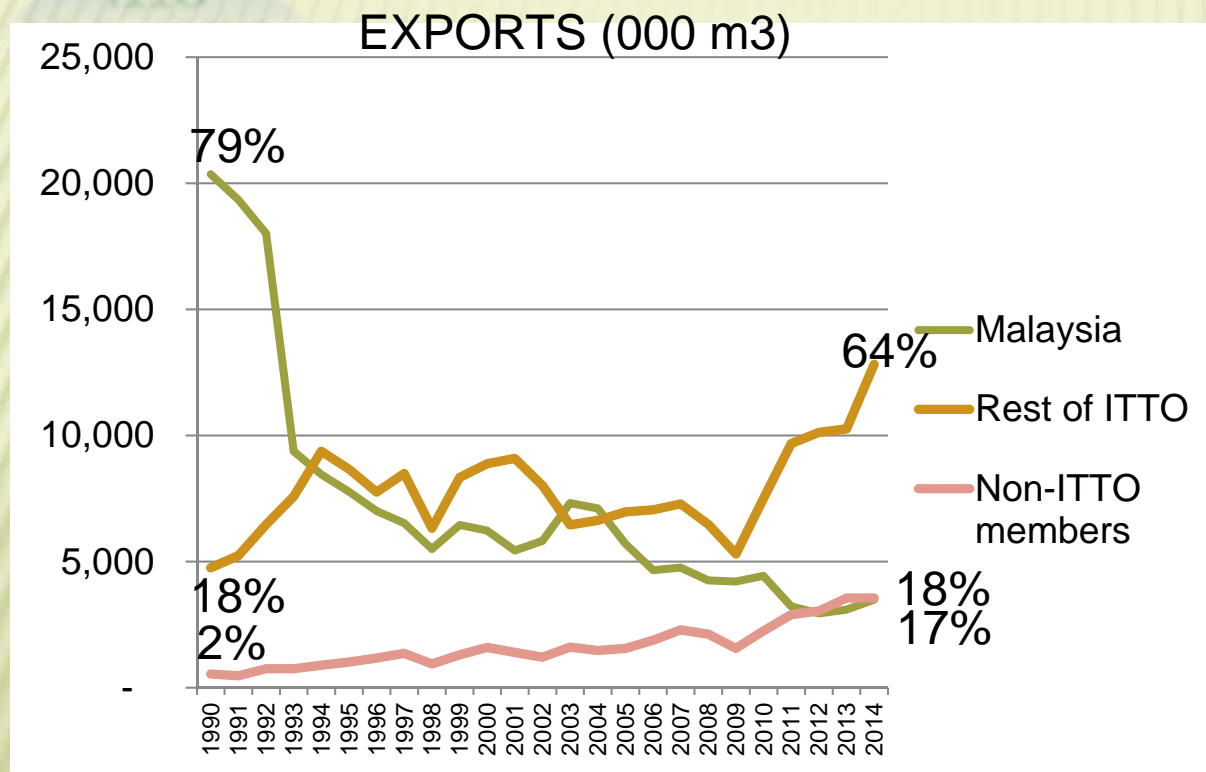
## LONG TERM ANALYSIS: IMPORTS OF TROP. IND. ROUNDWOOD



**83% of the trop ind. roundwood is imported by two countries only (China and India) .**



## LONG TERM ANALYSIS: EXPORTS OF TROP. IND. ROUNDWOOD

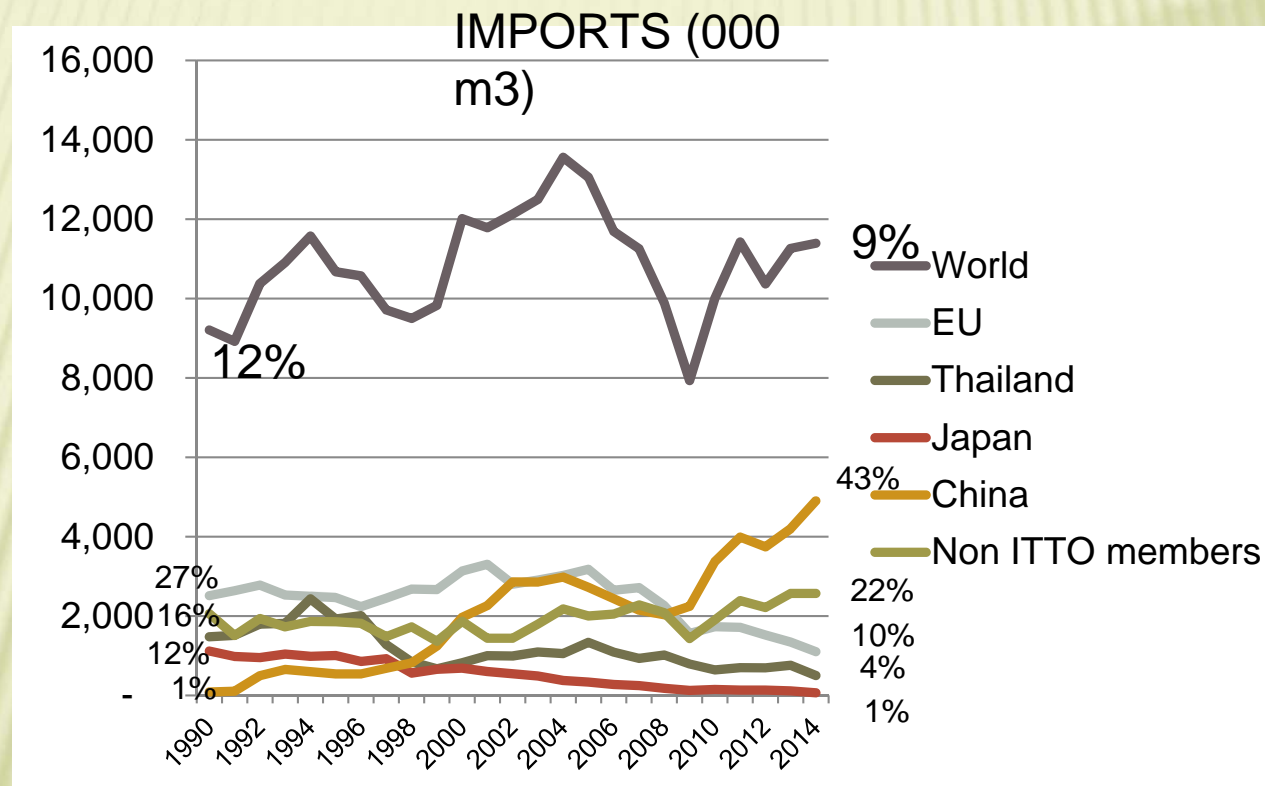


**Current situation  
on the trade of  
trop industrial  
roundwood:**

**More suppliers  
than buyers.**

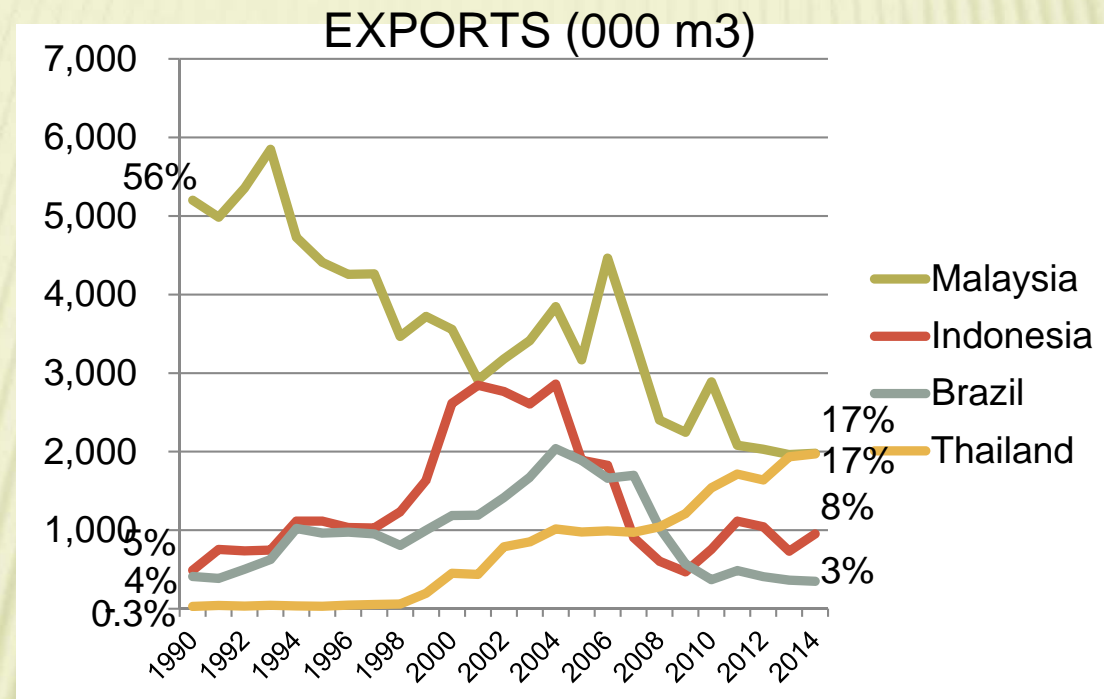


## LONG TERM ANALYSIS: IMPORTS OF TROP. SAWNWOOD





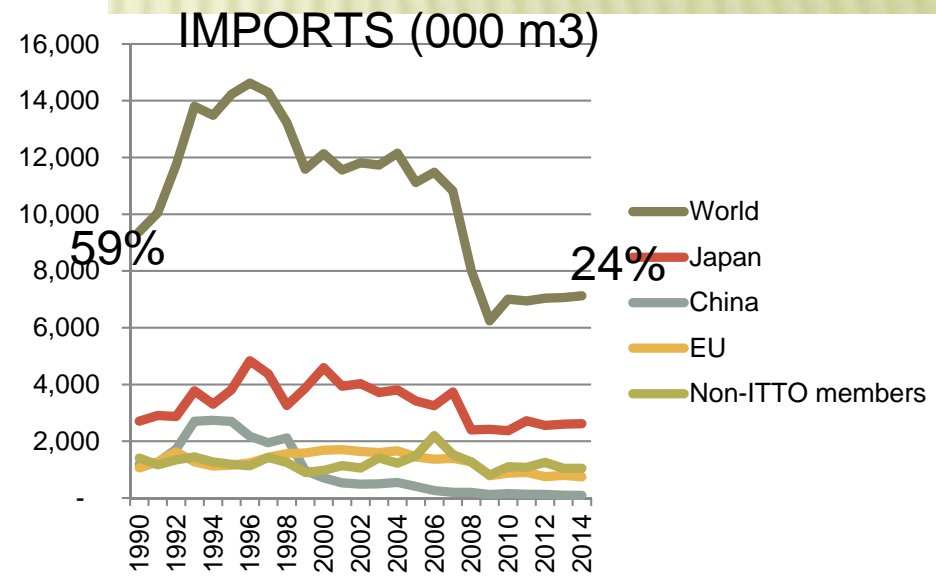
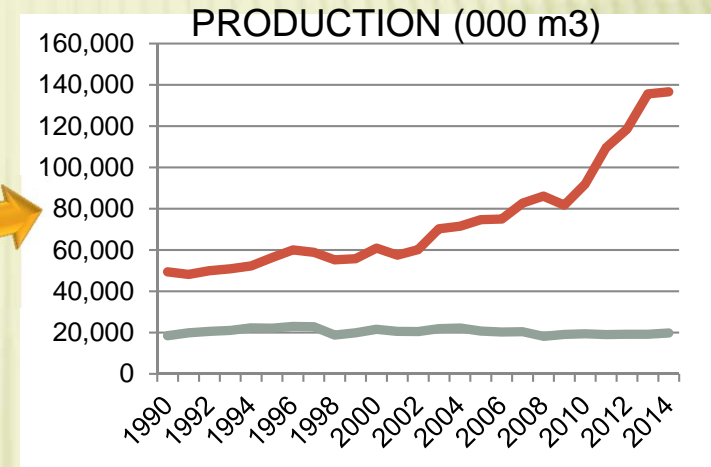
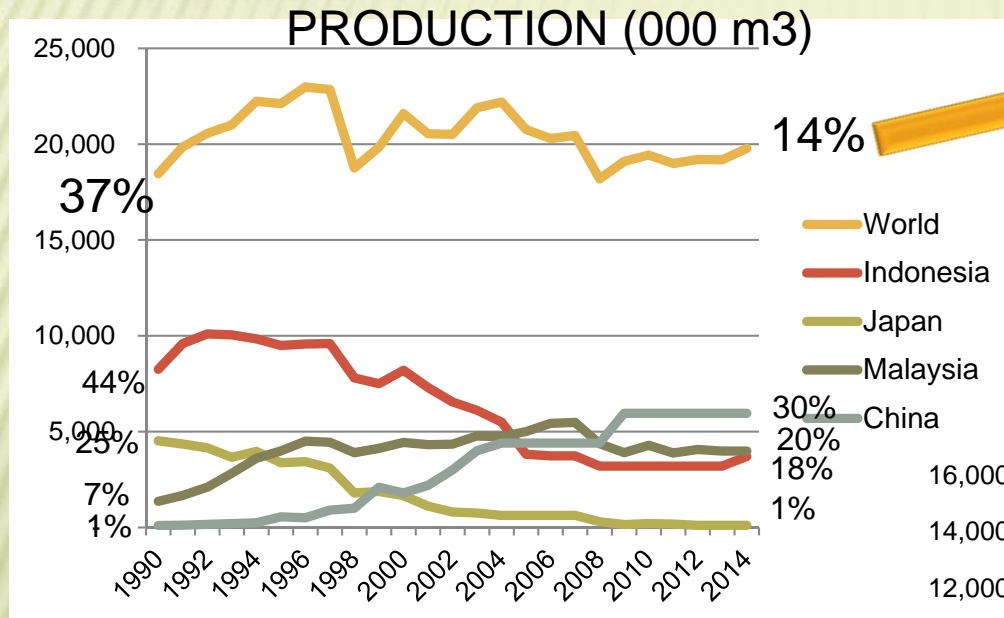
## LONG TERM ANALYSIS: EXPORTS OF TROP. SAWNWOOD





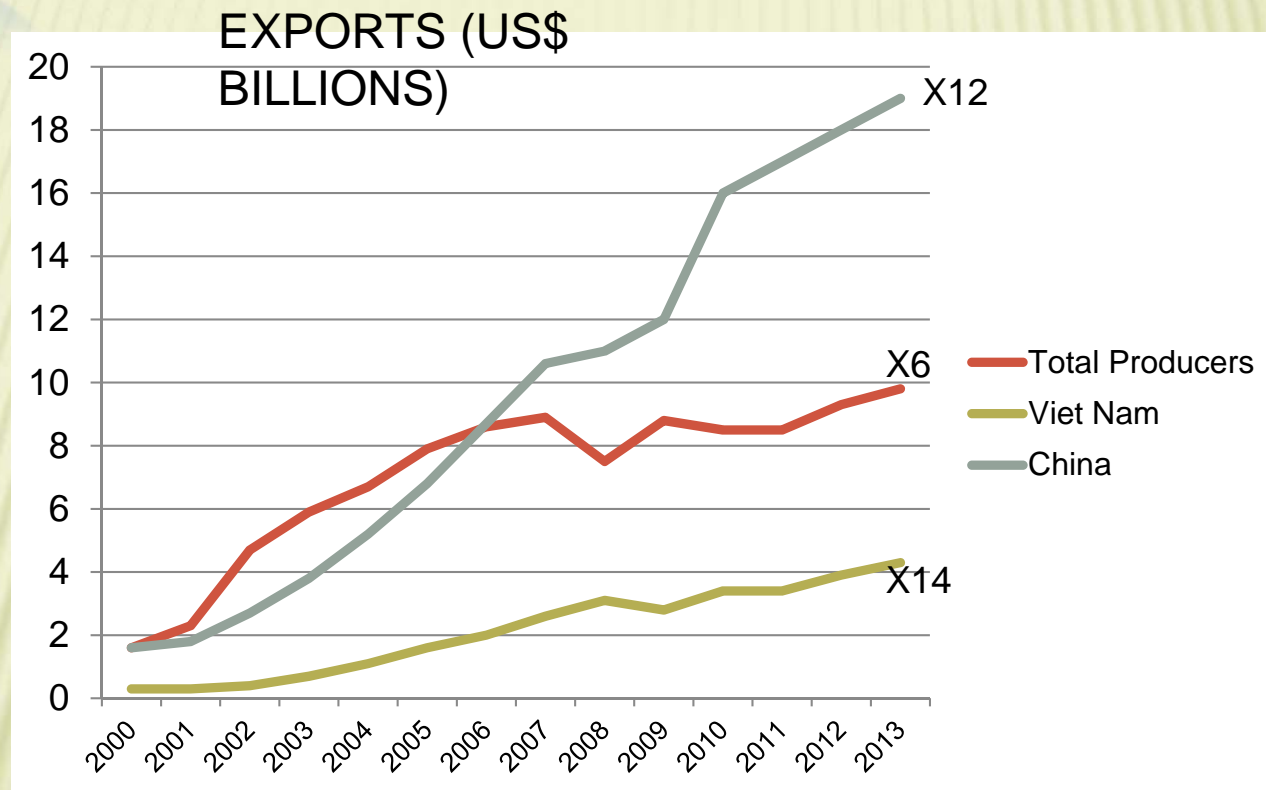


# LONG TERM ANALYSIS: PRODUCTION OF TROP. PLYWOOD





## SECONDARY PROCESSED WOOD PRODUCTS: EXPORTS OF WOODEN FURNITURE





## MAIN CONCLUSIONS: SEVERAL SHIFTS

In terms of consumption, the biggest consumer of tropical wood was a **tropical country** (Brazil) in 1990 . In 2014, the biggest consumer is a **non-tropical country**, China, Brazil being second.

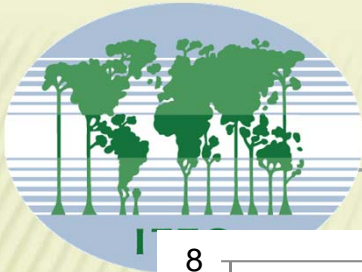
On one hand, the supply of tropical primary wood products has become more **diversified** on several countries over the years. In 1990, the supply was relying on a few key players. There are more players offering trop. primary wood products 25 years later. On the other hand, the demand for trop. primary wood products is more **dependent** on a few key players in 2014 than in 1990.

The share of tropical primary wood products vs non-tropical wood products has **decreased** over the last 25 years. The production of non trop. logs and ply has strongly increased in 25 years. **The production and the trade of trop. primary wood products has remained either stable or has diminished over time.**

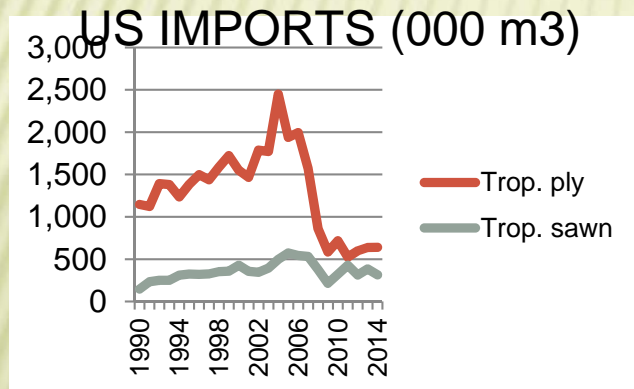
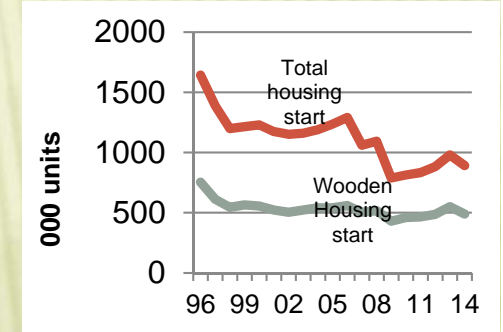
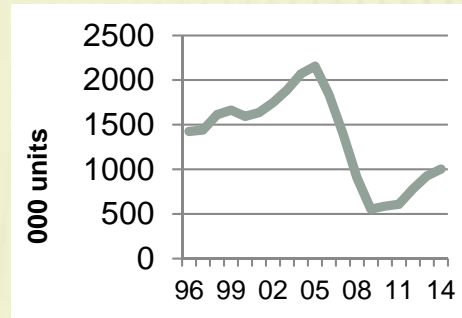
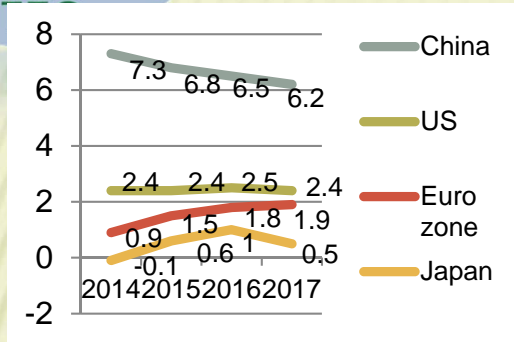
While in 1990, **Japan** was the biggest importer of trop. primary products (**30% RWE**). It is nowadays China (**37% RWE**).

**Malaysia** was the biggest exporter of trop. primary products (48% RWE). **Malaysia** is still the biggest exporter but its share has been divided by 2 (24% RWE) in 25 years.





# 2015



**Demand for primary tropical wood products**



First half of 2015, Sarawak logs exports -9%, ply exports -22% Sabah sawnwood exports-16%  
China logs imports -14% volume  
Japanese ply imports -26% (1<sup>st</sup> quarter 2015)



THANK YOU FOR YOUR ATTENTION



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