

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

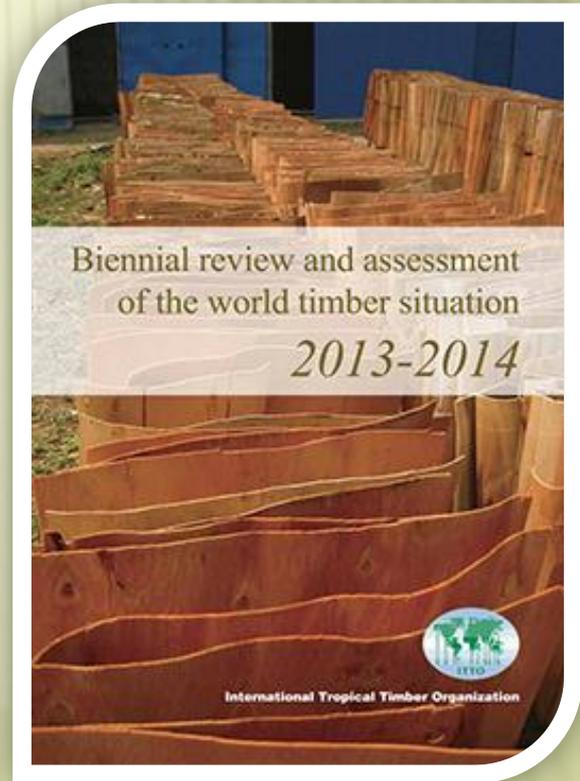


Jean-Christophe Claudon
ITTO Statistical Assistant



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

Code	Product	Unit	Quantity	Value
ROUNDWOOD REMOVALS				
C	ROUNDWOOD			
NC	Coniferous	1000 m ³ ub		
1	Non-Coniferous	1000 m ³ ub		
1C	WOOD FUEL (INCLUDING WOOD FOR CHARCOAL)	1000 m ³ ub		
1NC	Coniferous	1000 m ³ ub		
2	Non-Coniferous	1000 m ³ ub		
2C	INDUSTRIAL ROUNDWOOD (WOOD IN THE ROUGH)	1000 m ³ ub		
2NC	Coniferous	1000 m ³ ub		
21	Non-Coniferous	1000 m ³ ub		
21C	SAWLOGS AND VENEER LOGS	1000 m ³ ub		
21NC	Coniferous	1000 m ³ ub		
22	Non-Coniferous	1000 m ³ ub		
22C	PULPWOOD, ROUND AND SPLIT	1000 m ³ ub		
22NC	Coniferous	1000 m ³ ub		
23	Non-Coniferous	1000 m ³ ub		
23C	OTHER INDUSTRIAL ROUNDWOOD	1000 m ³ ub		
23NC	Coniferous	1000 m ³ ub		
	Non-Coniferous	1000 m ³ ub		
WOOD CHARCOAL PRODUCTION				
1	WOOD CHIPS, PARTICLES AND RESIDUES	1000 mt		
2	WOOD RESIDUES (INCLUDING WOOD FOR AGGLOMERATE)	1000 m ³		
1	WOOD PELLETS AND OTHER AGGLOMERATES	1000 m ³		
2	WOOD PELLETS	1000 m ³		
	OTHER AGGLOMERATES	1000 m ³		
	SAWWOOD	1000 m ³		



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.

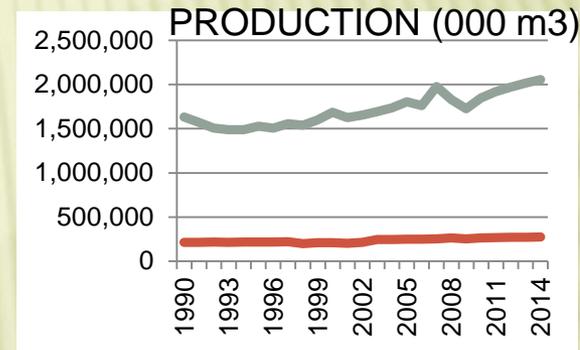
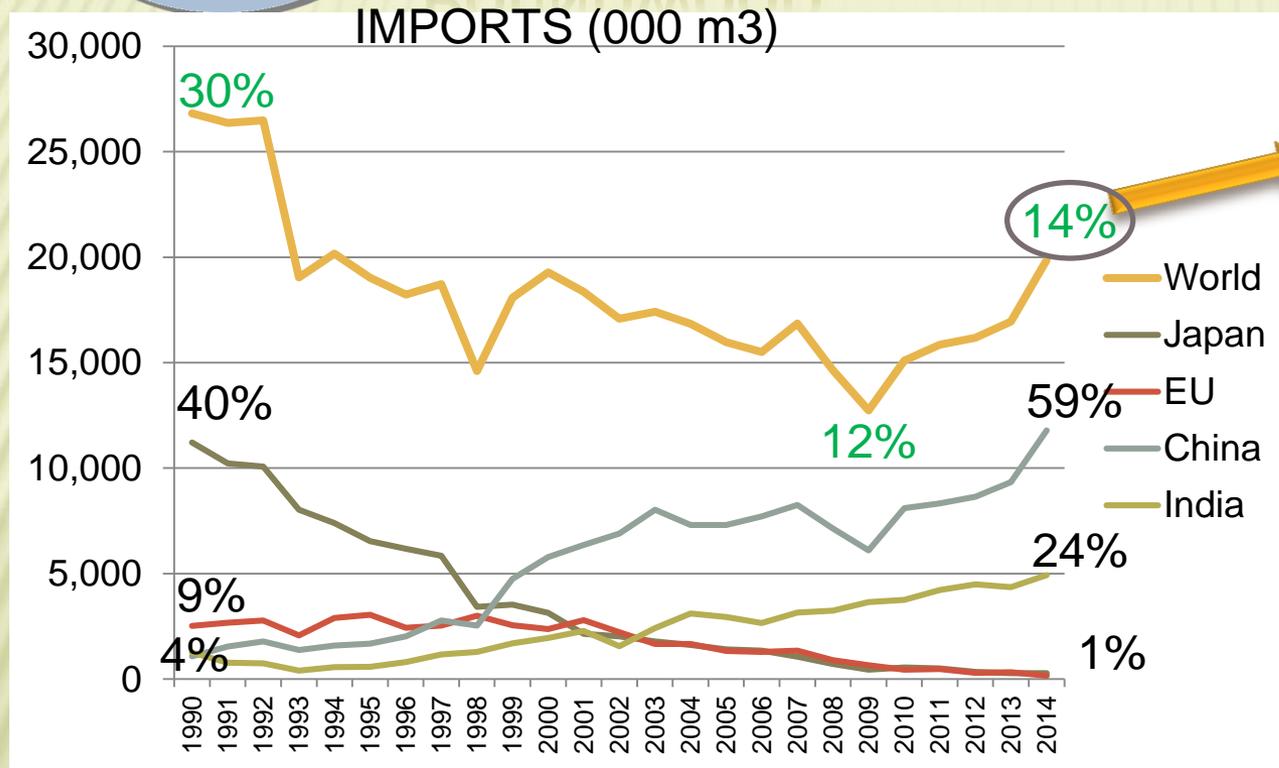
Trade: relatively easier to collect. Only 7% of the trade data is repeated and 96% of this repeated data concerns last year. We have a lot of complementary data from COMTRADE which is the official trade database from the

UN

Publication	2,508	1,789	1,660	905	42	57	28	8
INIT VALUE	159	207	333	441	591	427	409	512
Gabon -I-2.MC.T -EXP	previous volume (1861.37294908) repeated hu	previous volume (2163.003CB) repeated hu	previous volume (1741.568CB) repeated hu		previous volume (85.983CB) repeated hu		previous volume (21.862CB) repeated hu	
	Comtrade ID 266	FAO ID 74	TR		JQ2014			
					U.V.			
COMTRADE	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown
COMTRADE INIT VALUE	2,508	1,789	414					
BACKWARD COMTRADE	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown
BACKWARD COMTRADE INV	1,861	1,729	1,747	3,173	363	57	3,412	
FAO	1,860	2,162	1,742	126	68	427	3	
FAO INIT VALUE	378	325	317	905	90	47	19	
				441	274	513	506	
ITTO Publication	2007	2008	2009	2010	2011	2012	2013	2014



LONG TERM ANALYSIS: IMPORTS OF TROP. IND. ROUNDWOOD

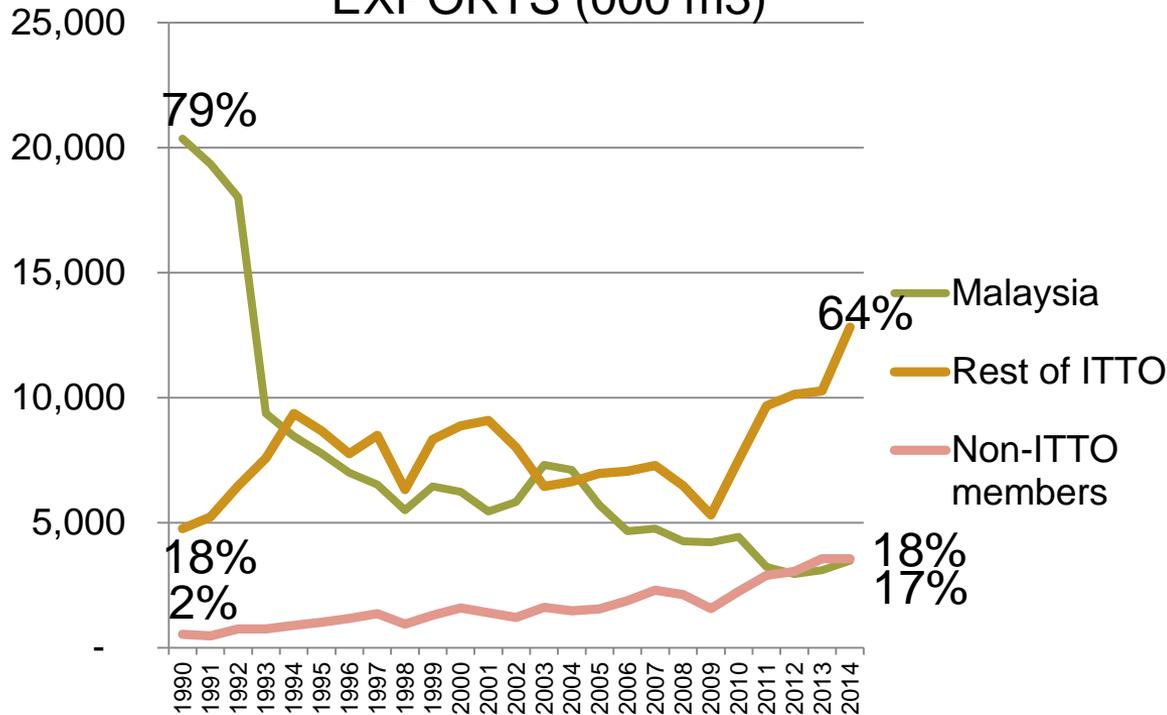


83% of the trop ind. roundwood is imported by two countries only (China and India) .



LONG TERM ANALYSIS: EXPORTS OF TROP. IND. ROUNDWOOD

EXPORTS (000 m3)

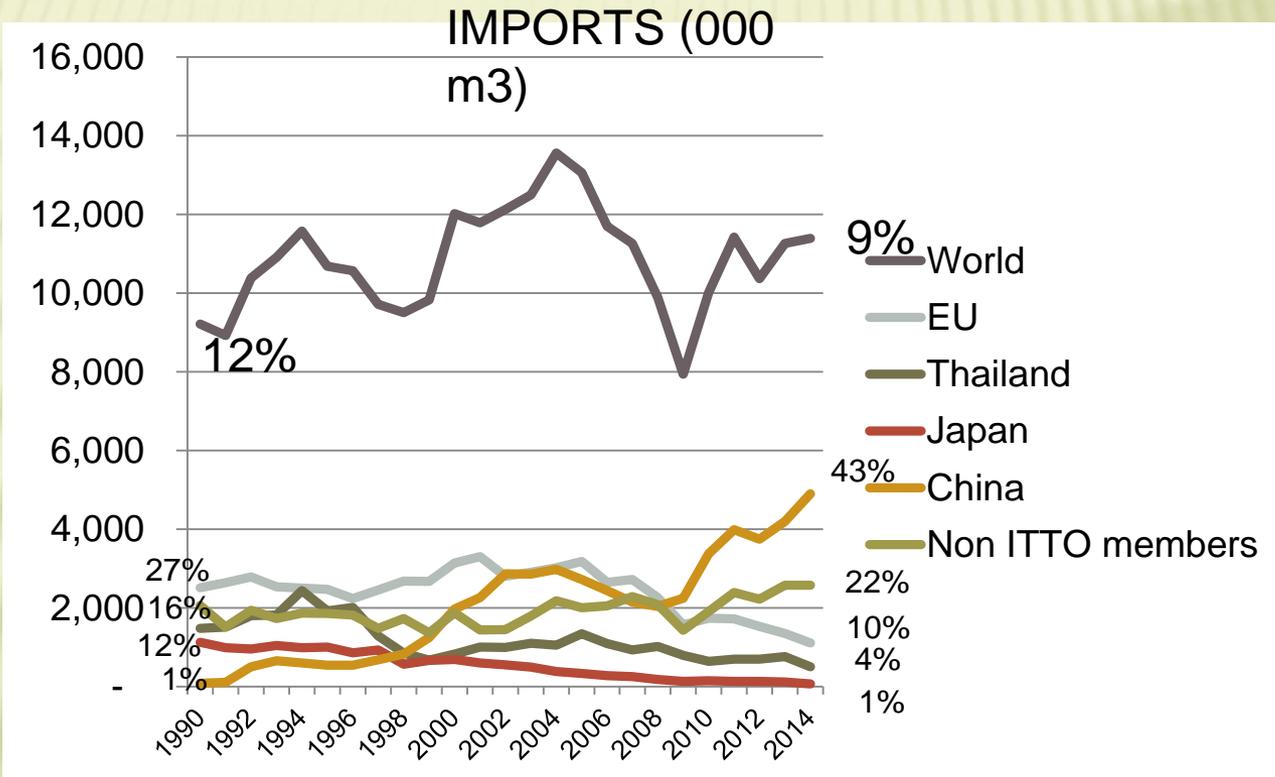


Current situation on the trade of trop industrial roundwood:

More suppliers than buyers.

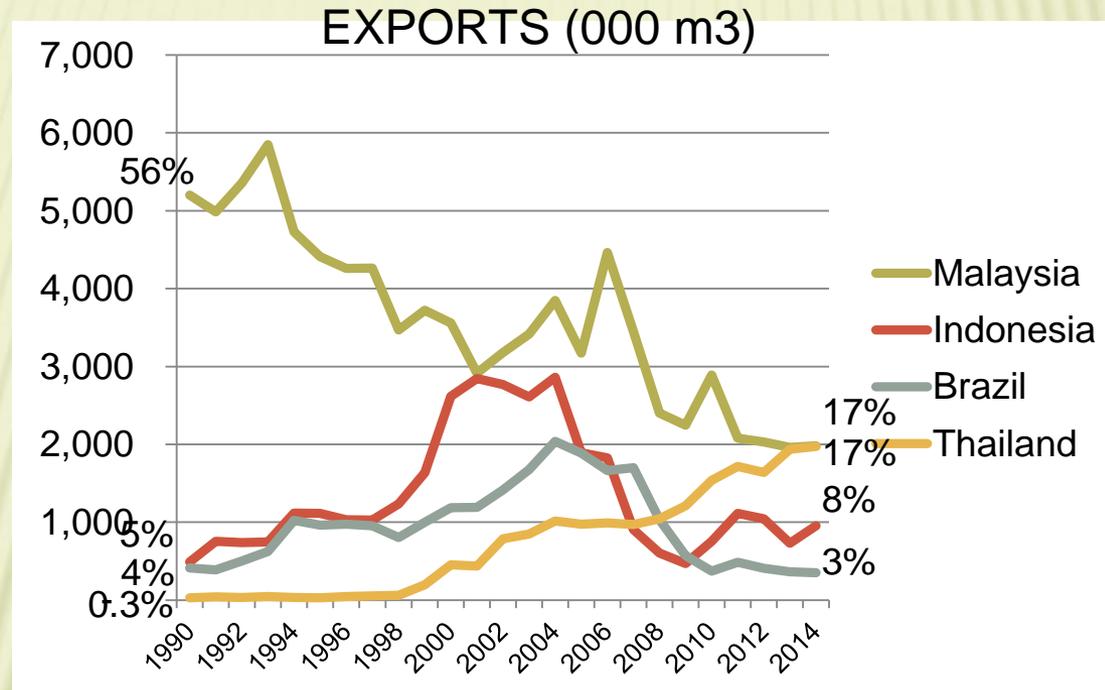


LONG TERM ANALYSIS: IMPORTS OF TROP. SAWNWOOD





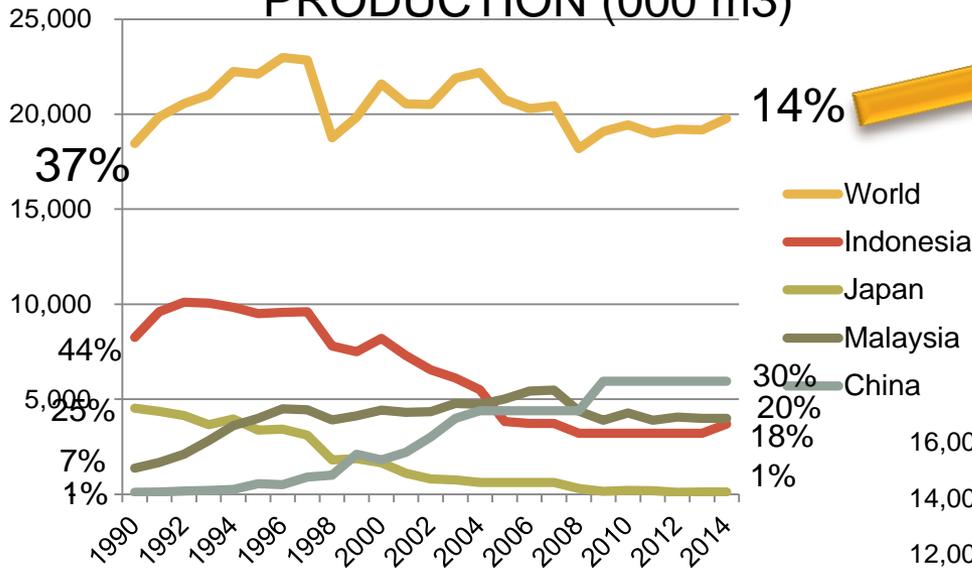
LONG TERM ANALYSIS: EXPORTS OF TROP. SAWNWOOD



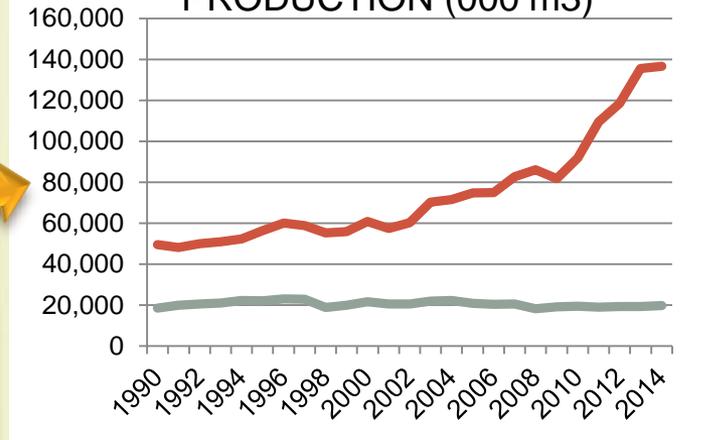


LONG TERM ANALYSIS: PRODUCTION OF TROP. PLYWOOD

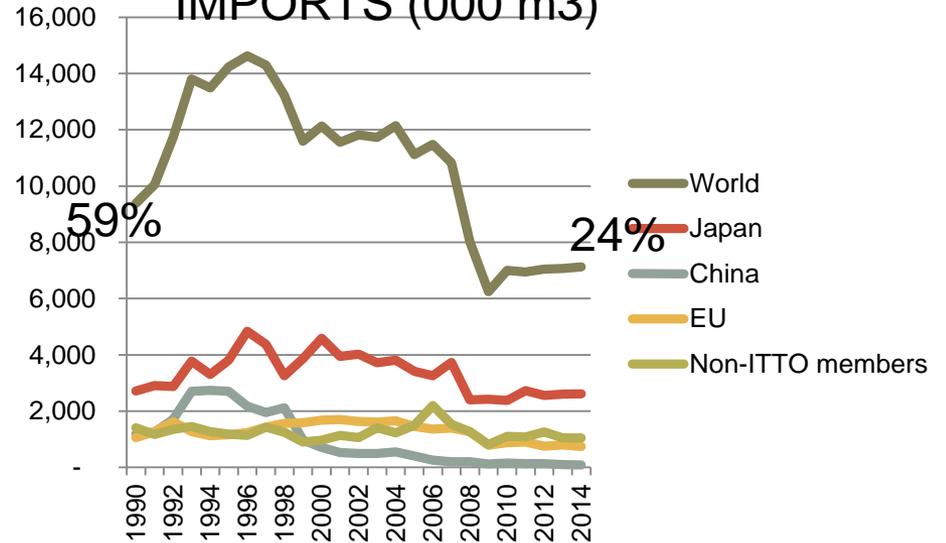
PRODUCTION (000 m3)



PRODUCTION (000 m3)

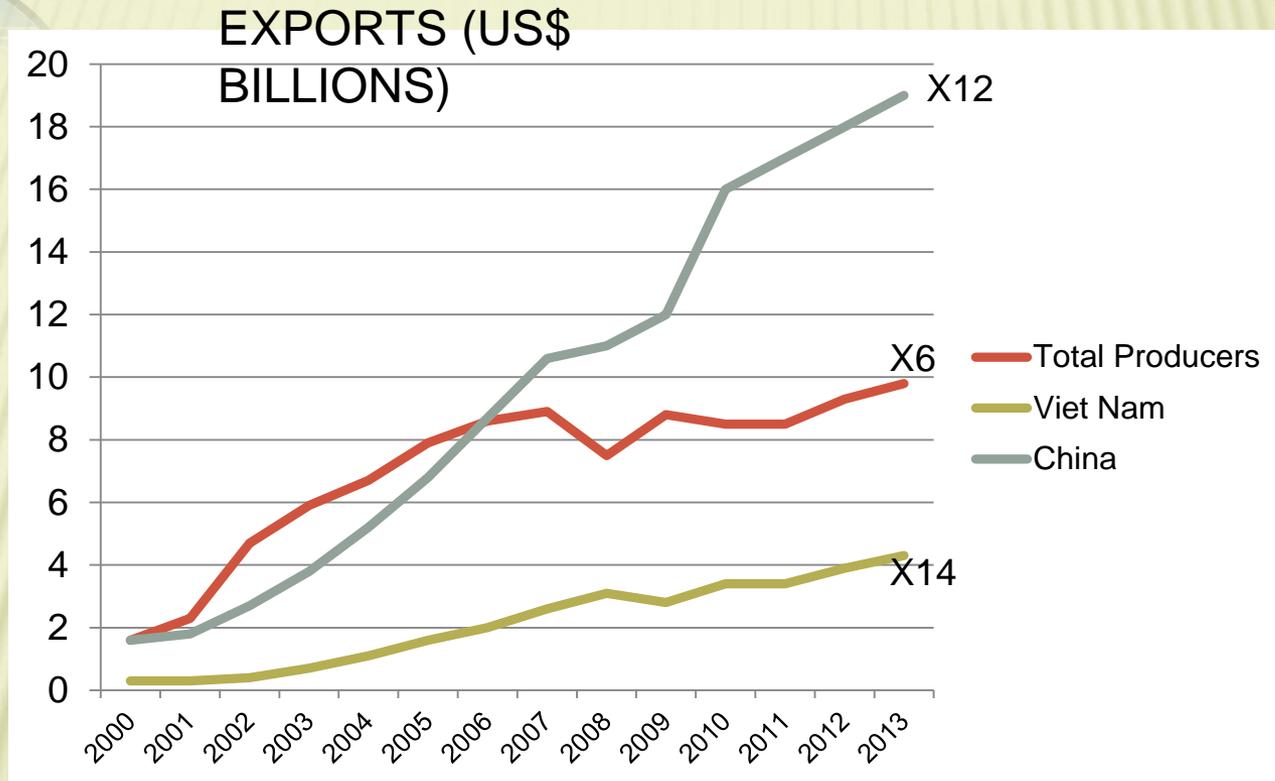


IMPORTS (000 m3)





SECONDARY PROCESSED WOOD PRODUCTS: EXPORTS OF WOODEN FURNITURE





MAIN CONCLUSIONS: SEVERAL SHIFTS

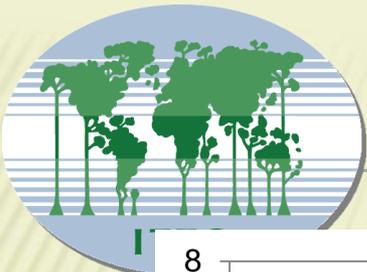
In terms of consumption, the biggest consumer of tropical wood was a **tropical country** (Brazil) in 1990 . In 2014, the biggest consumer is a **non-tropical country**, China, Brazil being second.

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.

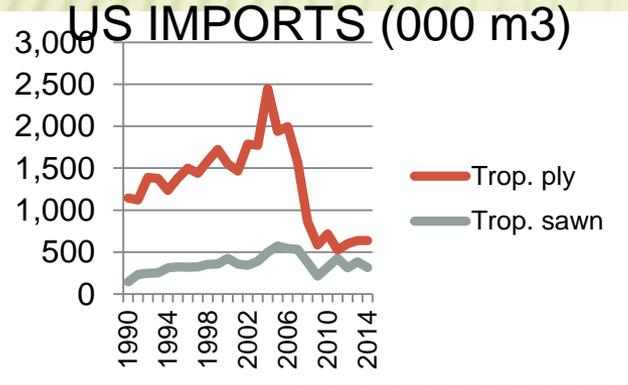
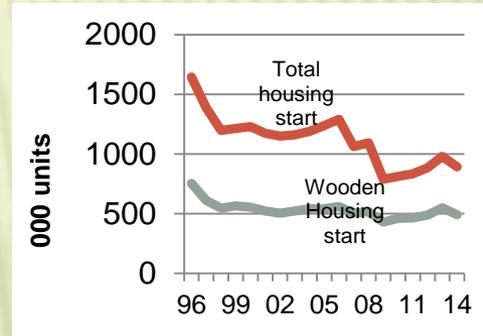
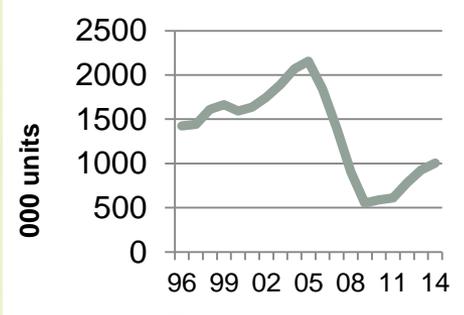
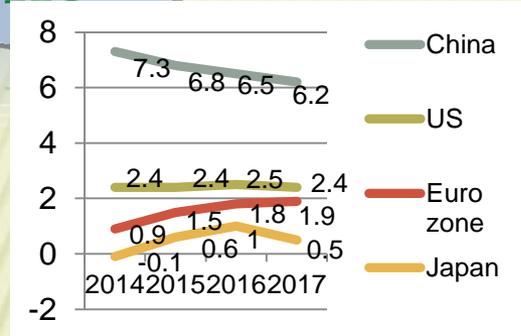
The share of tropical primary wood products vs non-tropical wood products has **decreased** over the last 25 years. The production of non trop. logs and ply has strongly increased in 25 years. **The production and the trade of trop. primary wood products has remained either stable or has diminished over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

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

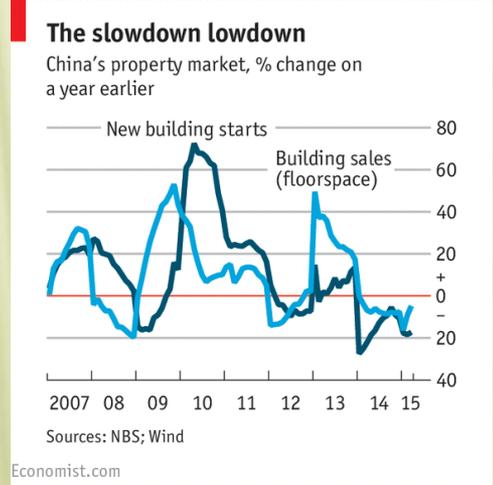
Malaysia was the biggest exporter of trop. primary products (48% RWE). **Malaysia** is still the biggest exporter but its share has been divided by 2 (24% RWE) in 25 years.



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% (1st quarter 2015)



THANK YOU FOR YOUR ATTENTION



Jean-Christophe CLAUDON
itto-stats@itto.int