

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

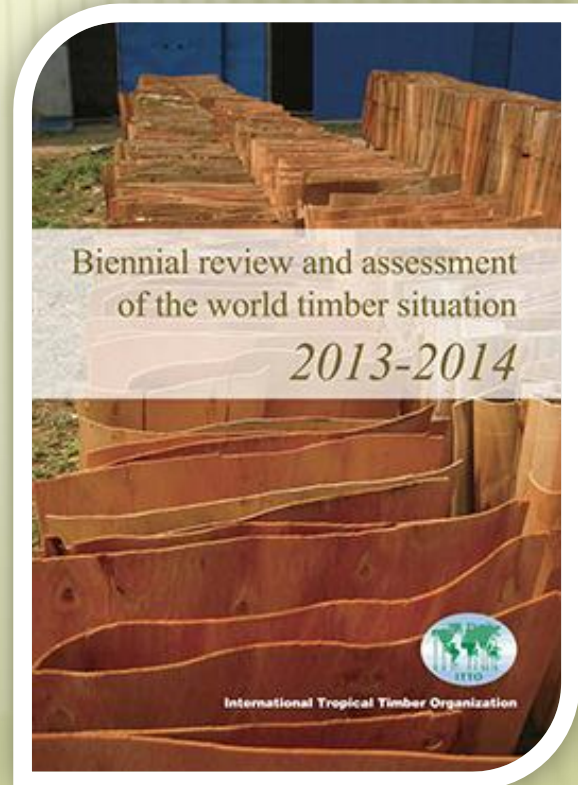


Jean-Christophe Claudon
ITTO Statistical Assistant



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		Leathery	Latamery
C	ROUNDWOOD	Coniferous	1000 m³/b		
NC		Non-Coniferous	1000 m³/b		
1	WOOD FUEL (INCLUDING WOOD FOR CHARCOAL)	Coniferous	1000 m³/b		
1C		Non-Coniferous	1000 m³/b		
1NC		Coniferous	1000 m³/b		
2	INDUSTRIAL ROUNDWOOD (WOOD IN THE ROUGH)	Coniferous	1000 m³/b		
2C		Non-Coniferous	1000 m³/b		
2NC		Coniferous	1000 m³/b		
2.1		Non-Coniferous	1000 m³/b		
2.1C	SAWLOGS AND VENEER LOGS	Coniferous	1000 m³/b		
2.1NC		Non-Coniferous	1000 m³/b		
2.2	PULPWOOD, ROUND AND SPLIT	Coniferous	1000 m³/b		
2.2C		Non-Coniferous	1000 m³/b		
2.2NC		Coniferous	1000 m³/b		
2.3	OTHER INDUSTRIAL ROUNDWOOD	Coniferous	1000 m³/b		
2.3C		Non-Coniferous	1000 m³/b		
2.3NC		Coniferous	1000 m³/b		
		Non-Coniferous	1000 m³/b		
	WOOD CHARCOAL		1000 m³/b		
	WOOD CHIPS, PARTICLES AND RESIDUES		1000 m³		
1	WOOD CHIPS AND PARTICLES		1000 m³		
2	WOOD RESIDUES (INCLUDING WOOD FOR AGGLOMERATE)		1000 m³		
1	WOOD PELLETS AND OTHER AGGLOMERATES		1000 m³		
2	OTHER AGGLOMERATES		1000 m³		
	SAWWOOD		1000 m³		



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.

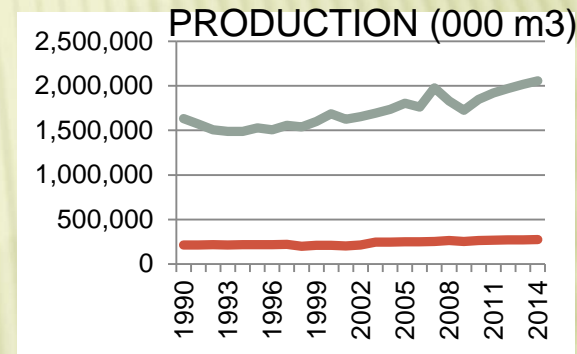
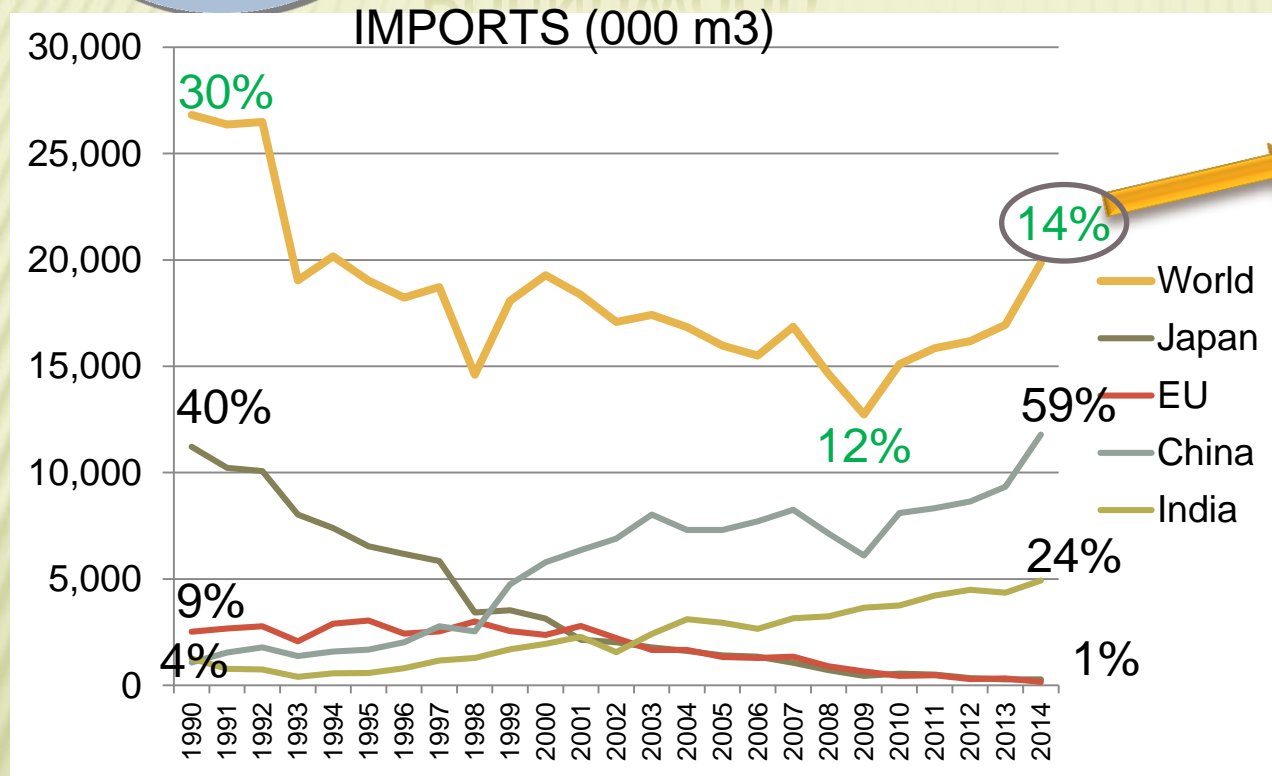
Trade: relatively easier to collect. Only 7% of the trade data is repeated and 96% of this repeated data concerns last year. We have a lot of complementary data from COMTRADE which is the official trade database from the

UN

Publication	2,508	1,789	1,660	905	42	57	28	8
UNIT VALUE	159	207	333	441	591	427	409	512
Galton -1-2.NC.F -EXP	previous volume (1841.37294908) estimated by	previous volume (2163.003CB) estimated by	previous volume (1741.568CB) estimated by		previous volume (85.983CB) estimated by		previous volume (21.862CB) estimated by	
Comtrade ID	266	74			JQ2014			
CONTRADE	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	U.V.			
CONTRADE UNIT VALUE	2,508	1,789	414	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown
CONTRADE	159	207	911					
BACKWARD CONTRADE	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown	Get Breakdown
BACKWARD CONTRADE UNIT VALUE	1,861	1,729	1,747	3,173	363	57	3,412	
FAO	378	407	316	126	68	427	3	
FAO UNIT VALUE	1,860	2,162	1,742	905	90	47	19	
	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

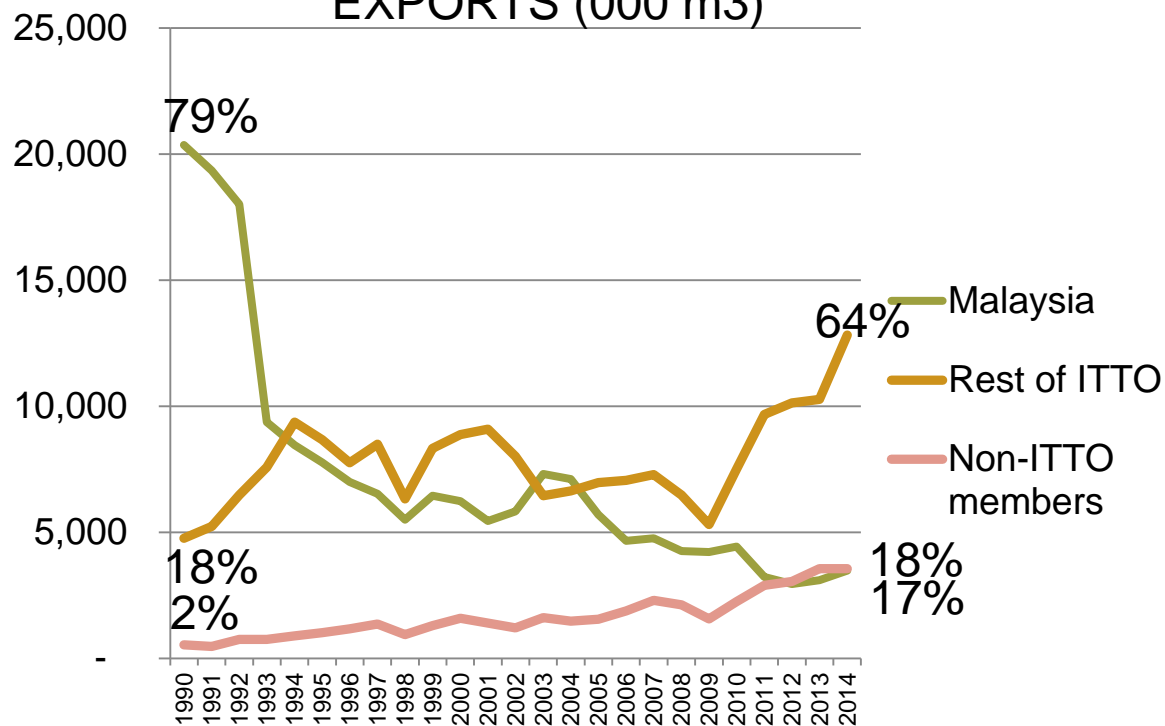


83% of the trop ind. roundwood is imported by two countries only (China and India) .



LONG TERM ANALYSIS: EXPORTS OF TROP. IND. ROUNDWOOD

EXPORTS (000 m3)

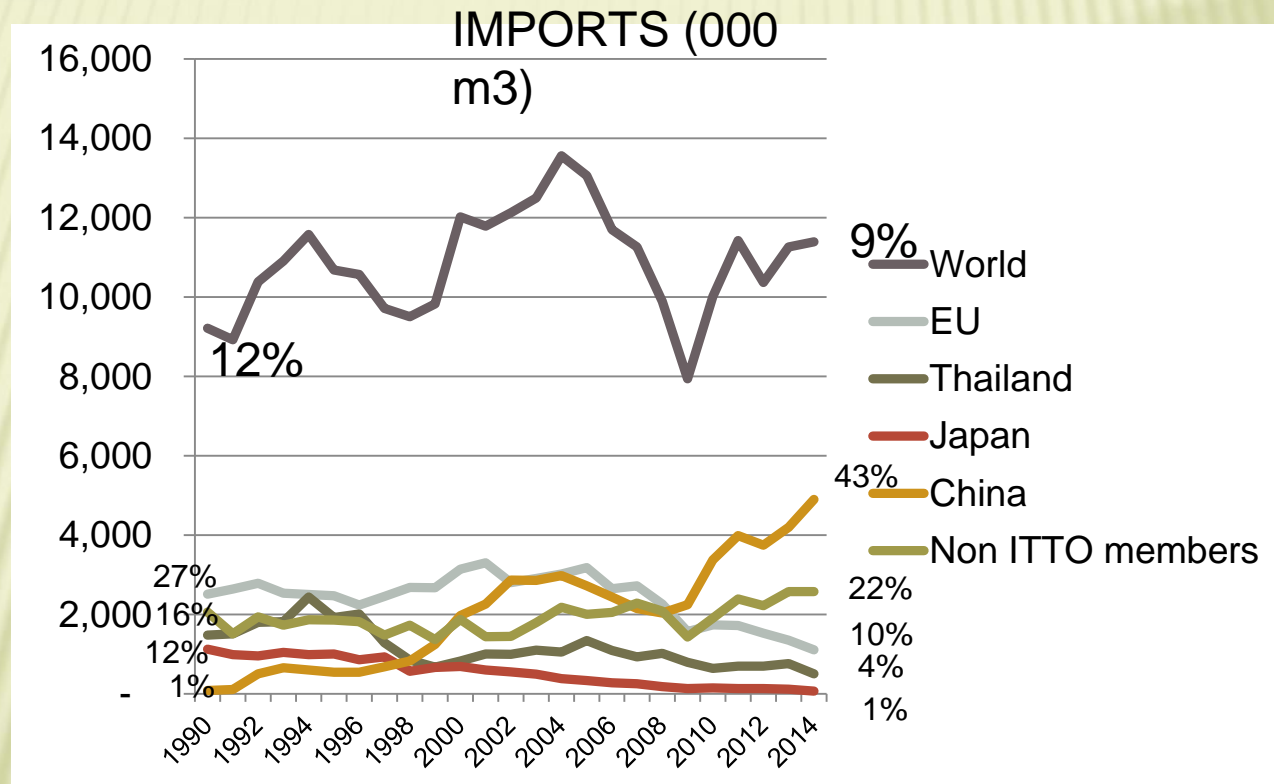


**Current situation
on the trade of
trop industrial
roundwood:**

**More suppliers
than buyers.**

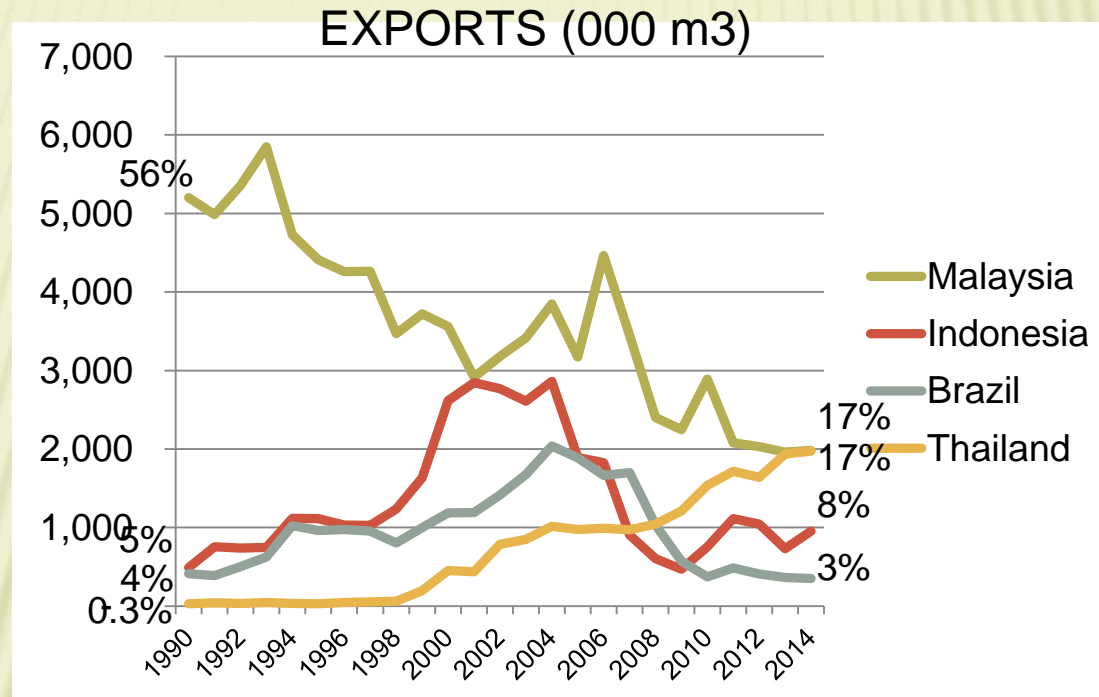


LONG TERM ANALYSIS: IMPORTS OF TROP. SAWNWOOD





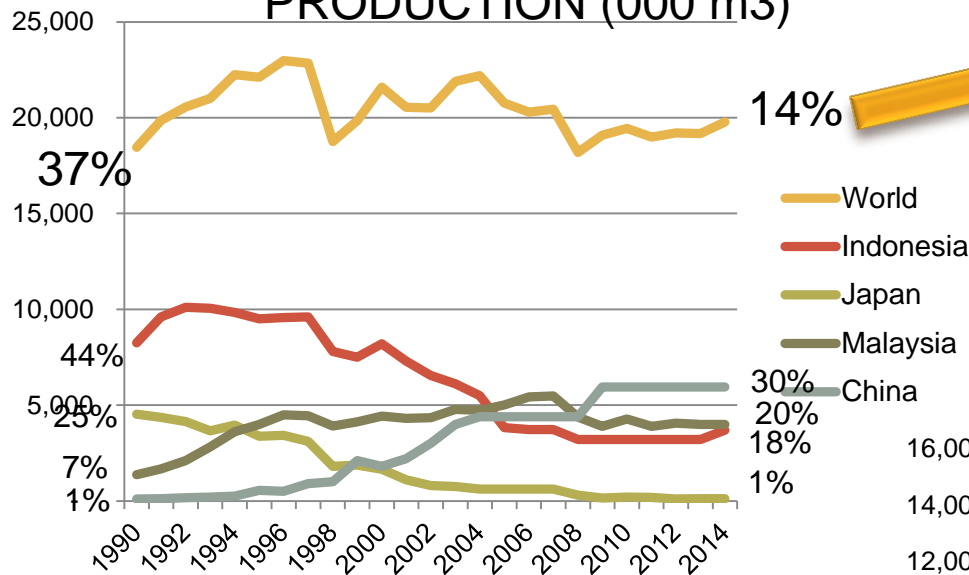
LONG TERM ANALYSIS: EXPORTS OF TROP. SAWNWOOD



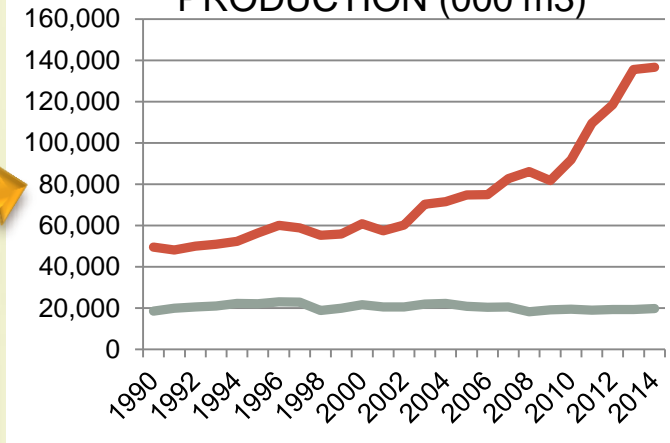


LONG TERM ANALYSIS: PRODUCTION OF TROP. PLYWOOD

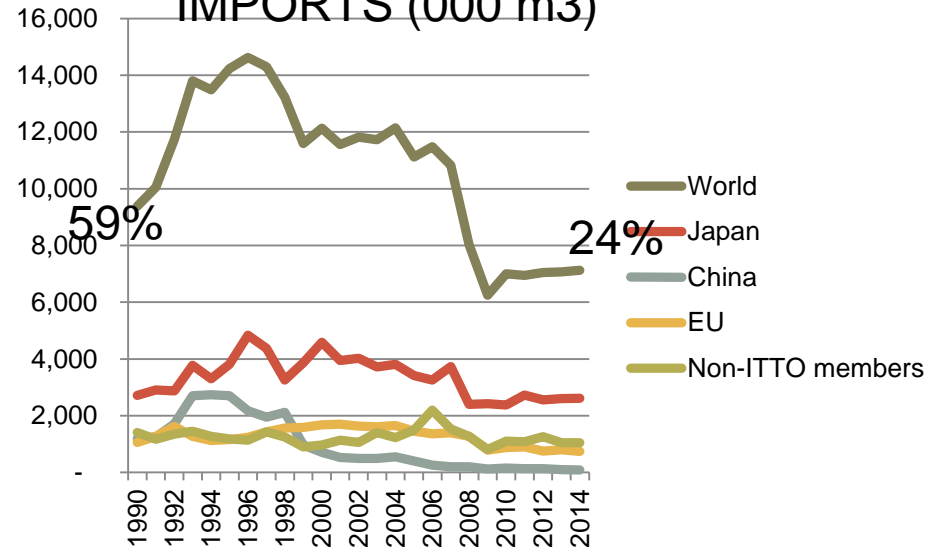
PRODUCTION (000 m3)



PRODUCTION (000 m3)

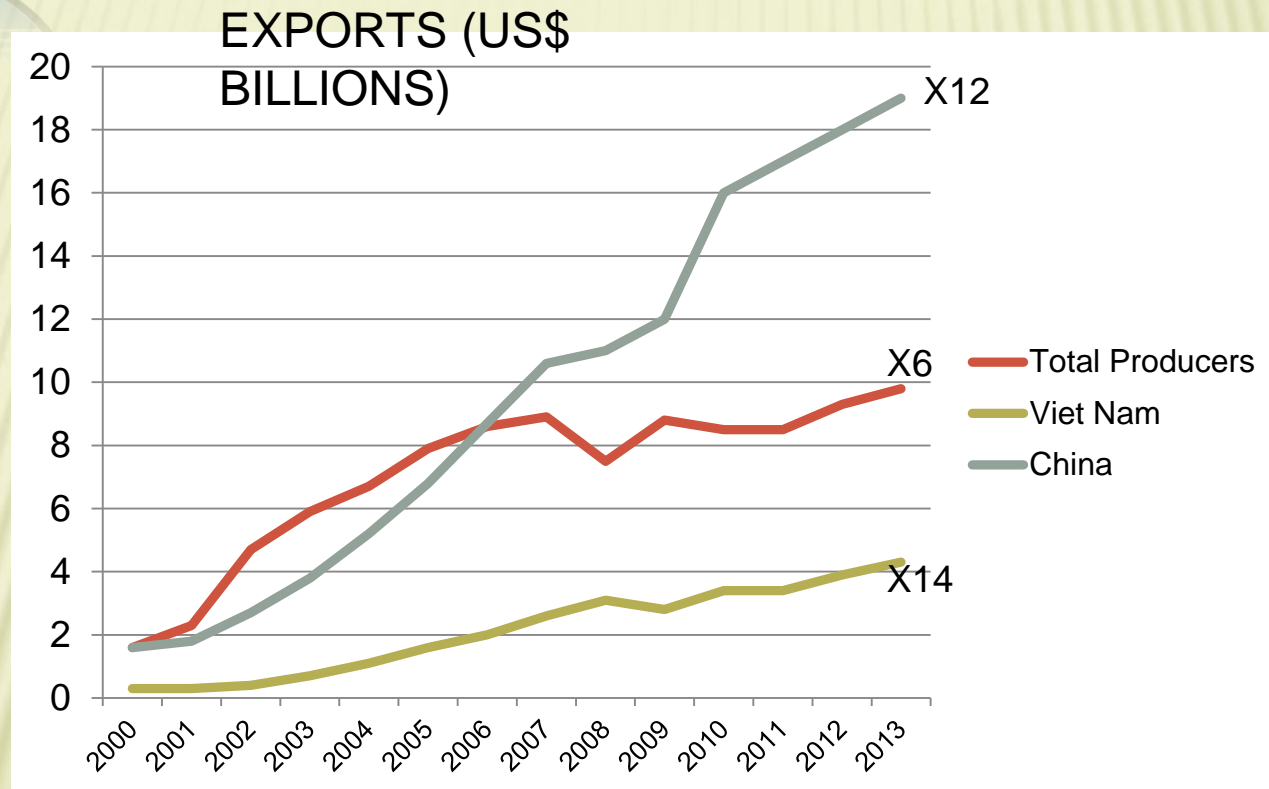


IMPORTS (000 m3)





SECONDARY PROCESSED WOOD PRODUCTS: EXPORTS OF WOODEN FURNITURE





MAIN CONCLUSIONS: SEVERAL SHIFTS

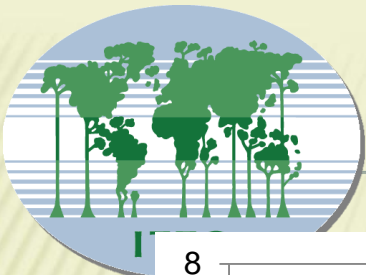
In terms of consumption, the biggest consumer of tropical wood was a **tropical country** (Brazil) in 1990 . In 2014, the biggest consumer is a **non-tropical country**, China, Brazil being second.

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.

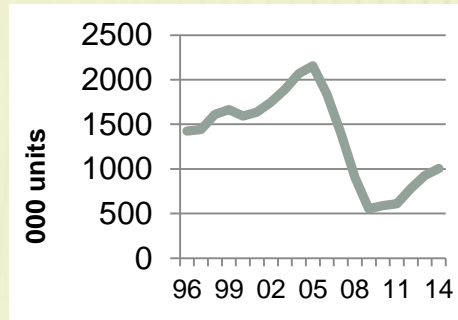
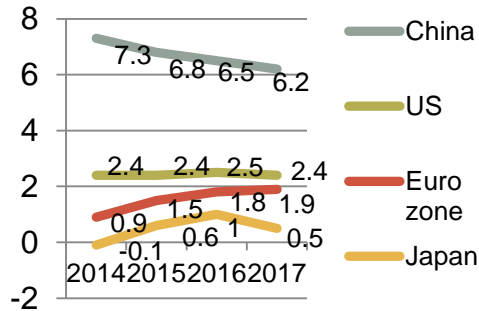
The share of tropical primary wood products vs non-tropical wood products has **decreased** over the last 25 years. The production of non trop. logs and ply has strongly increased in 25 years. **The production and the trade of trop. primary wood products has remained either stable or has diminished over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

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

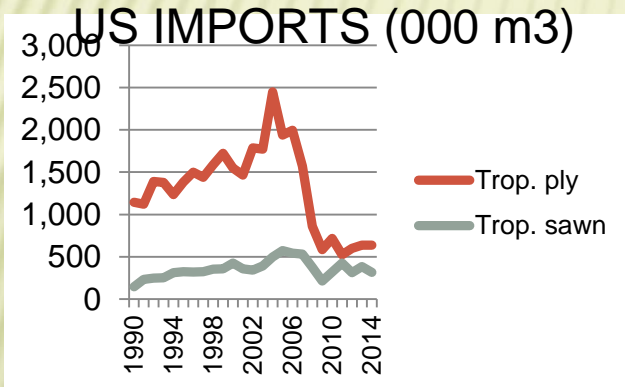
Malaysia was the biggest exporter of trop. primary products (48% RWE). **Malaysia** is still the biggest exporter but its share has been divided by 2 (24% RWE) in 25 years.



2015



Demand for primary tropical wood products



The slowdown slowdown

China's property market, % change on a year earlier



Sources: NBS; Wind

Economist.com

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