



ELEMENTS FOR THE BIENNIAL REVIEW AND ASSESSMENT OF THE WORLD TIMBER SITUATION 2023-2024

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 - Responses, database developments
- ❑ Tropical wood products production and trade
 - Primary wood products
 - Secondary processed wood products
- ❑ Global market trends and drivers
 - Market risks and uncertainties



JOINT FOREST SECTOR QUESTIONNAIRE 2023-2024





JQ Data responses

	Number of members responding to the JQ	
	ITTO Producers	ITTO Consumers
2023	23 of 37 producer members (62%)	33 of 37 consumer members (89%)
2024	12 of 37 producer members (32%)	29 of 38 consumer members (76%)



JQ Non-responses: Consumers

Consumers 2024: 9 non-responses

3 consumer countries have not provided the questionnaire for more than 2 consecutive years (ITTA ART. 27/5)

EU/UNECE (8)	Denmark (since 2018) Greece (since 2020) Hungary Ireland Malta (since 2021) Netherlands Romania Switzerland
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ITTO (1)	Rep. of Korea
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JQ Non-responses: Producers

Producers 2024: 25 non-responses

12 producer countries have not provided the questionnaire for more than 2 consecutive years (ITTA ART. 27/5)

Africa (12)	Angola Bénin (since 2020) Cameroon (since 2020) CAR (since 2023) Congo, Dem. Rep. Congo, Rep. of	Côte d'Ivoire Gabon (since 2023) Liberia (since 2019) Madagascar (since 2019) Mali Togo
Asia-Pacific (5)	Cambodia (since 2016) Fiji (since 2021) India	Myanmar PNG (since 2019)
LAC (8)	Guatemala Guyana (since 2021) Honduras Mexico	Panama Peru Trinidad and Tobago (since 2022) Venezuela (since 2018)



JQ Non-responses: letters

In 2025, we will send 15 letters requesting an explanation for the non-submission of the JFSQ quoting Article 27/5 to countries which have not submitted the questionnaire for more than 2 years in a row.

PRODUCERS (12)		
AFRICA (6)	ASIA (3)	LAC (3)
Bénin	Cambodia	Guyana
Cameroon	PNG	Trinidad and Tobago
CAR	Fiji	Venezuela
Gabon		
Liberia		
Madagascar		
CONSUMERS (3)		
Denmark		
Greece		
Malta		

Article 27/5. If a member has not furnished, for two consecutive years, the statistics and information required under paragraph 3 and has not sought the assistance of the Executive Director, the Executive Director shall initially request an explanation from that member within a specified time. In the event that no satisfactory explanation is forthcoming, the Council shall take such action as it deems appropriate.



JQ 2024 Data Quality

- ❖ 38 countries submitted consistent data on production of wood products
- ❖ 40 countries submitted data on trade of primary wood products
- ❖ 38 countries submitted data on trade of secondary wood products
- ❖ Only 14 countries provided information on production and trade of primary wood products for the year 2024 (sheet ITTO1)
- ❖ Only 20 countries provided trade on tropical species (sheet ITTO2)
- ❖ Only 11 countries provided insights on their forestry sector (sheet ITTO3)
- ❖ 31 countries were on time (30-Sept-2024)



Database developments

- ❑ Updated once a year (next release -> Aug. 2025)
- ❑ Statistical training workshop in Mexico, March 2024 (43 forest specialists, technicians, statisticians and academics of five Mesoamerican countries—Costa Rica, Guatemala, Honduras, Mexico and Panama)
- ❑ Next statistical training workshop in Peru, Feb. 2025. 13 South America countries to be invited
- ❑ Long-term review of tropical wood products consumption and trade was published in 2024 (Technical Series 52)
- ❑ Conversion factors study for tropical veneer and plywood will be published in Jan. 2025
- ❑ ITTO plans to fund a study with CIFOR on DRC domestic consumption of timber
- ❑ Biennial Review 2023-2024 to be published in mid-2025

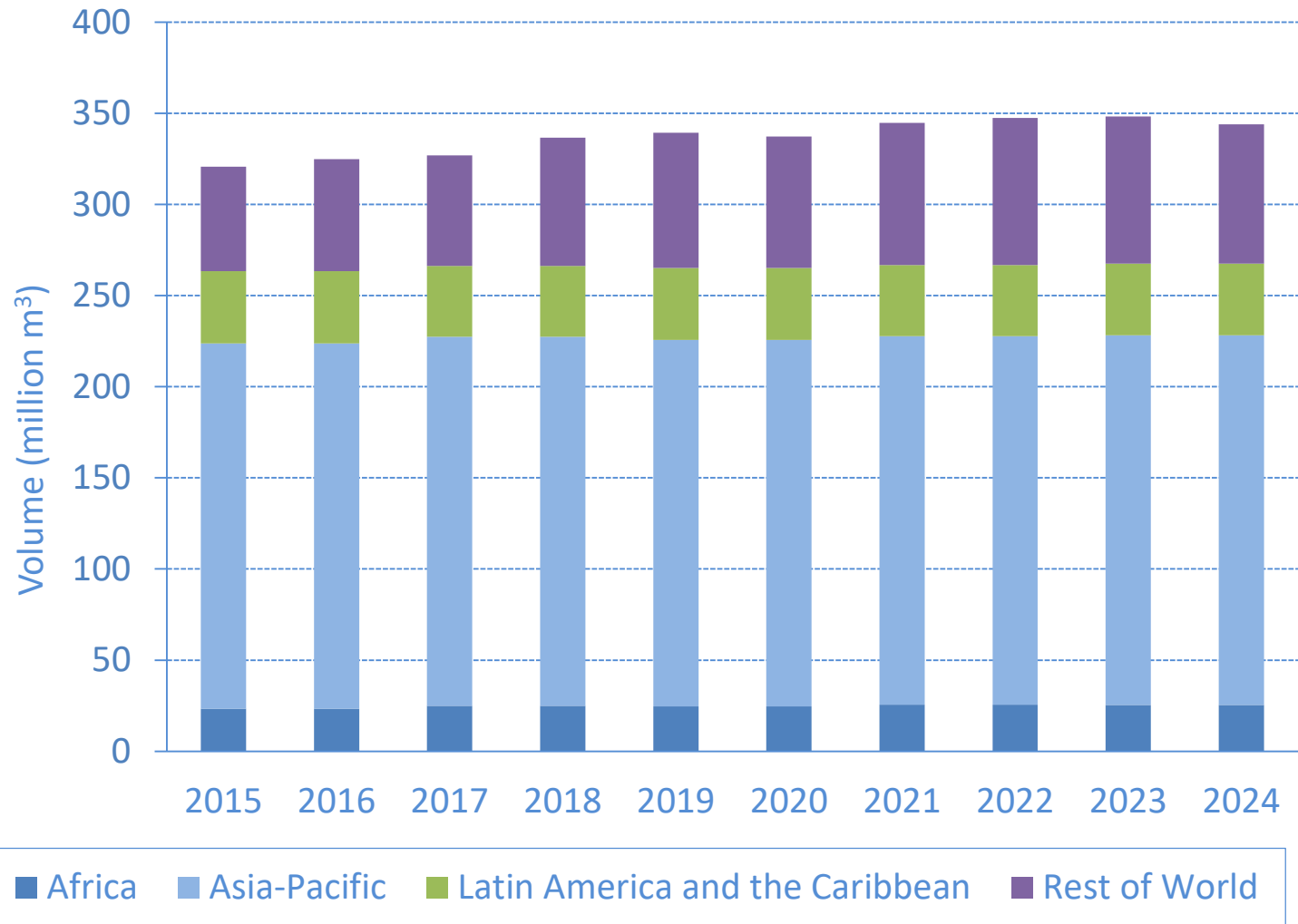


PRODUCTION AND TRADE TRENDS PRIMARY WOOD PRODUCTS

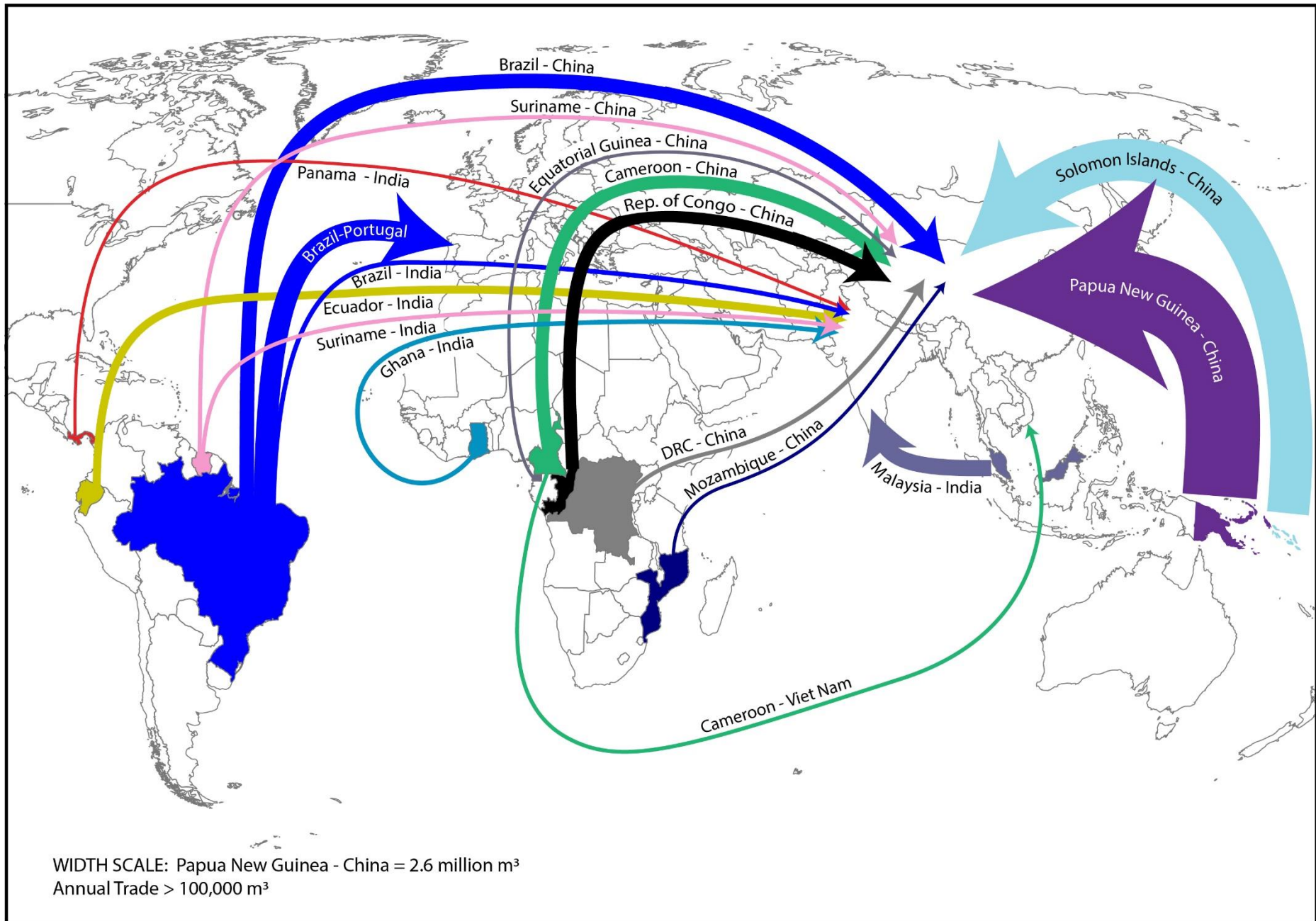




Production of tropical logs by region, 2015-2024

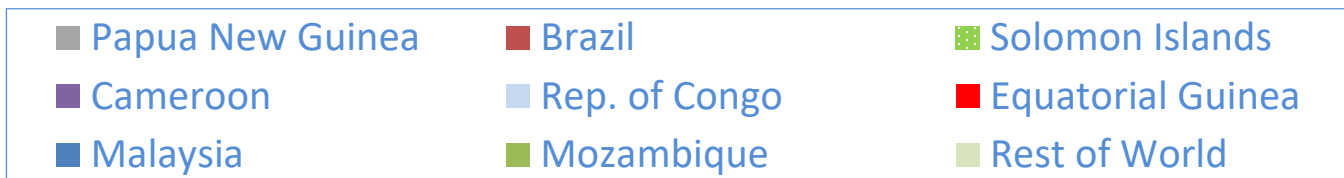
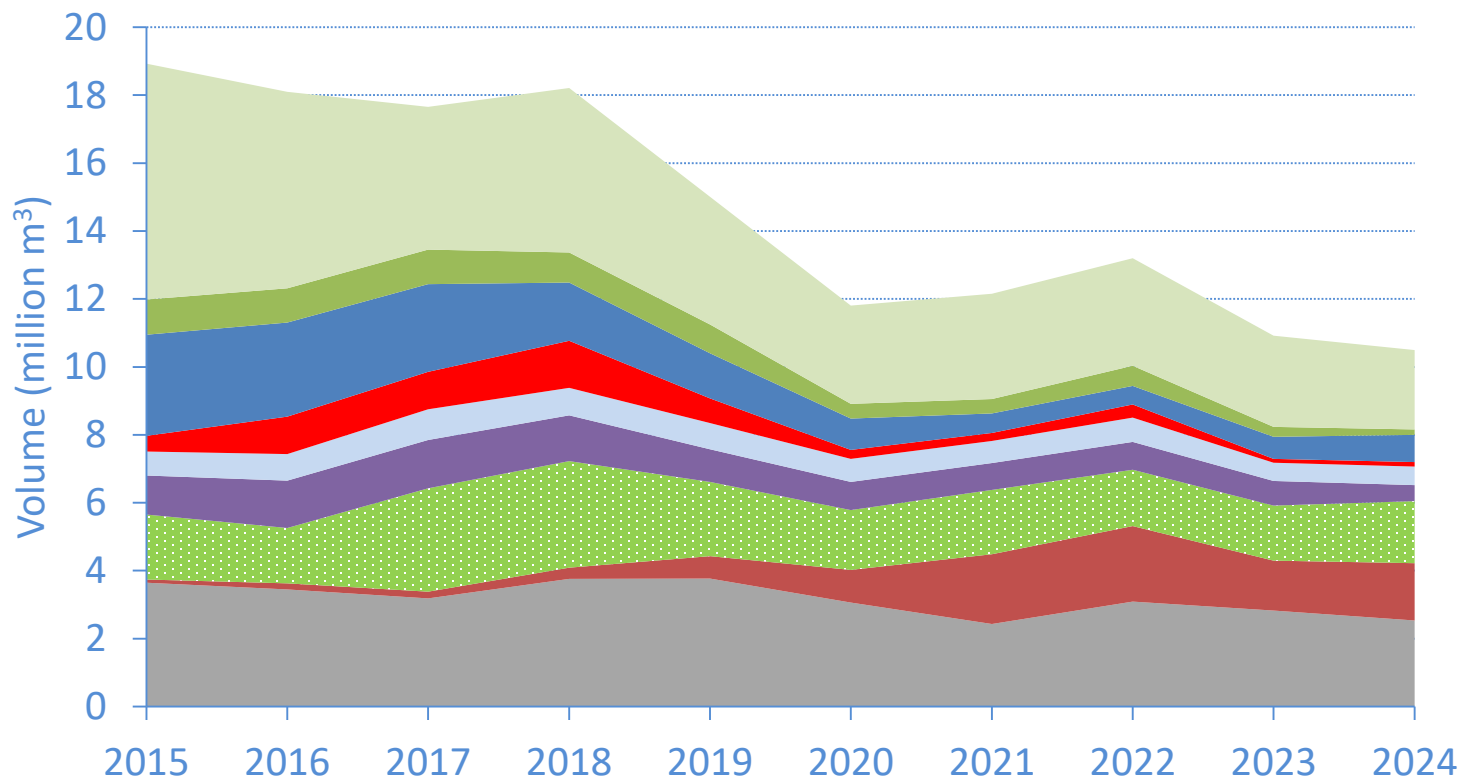


MAJOR TRADE FLOWS 2023: TROPICAL LOGS



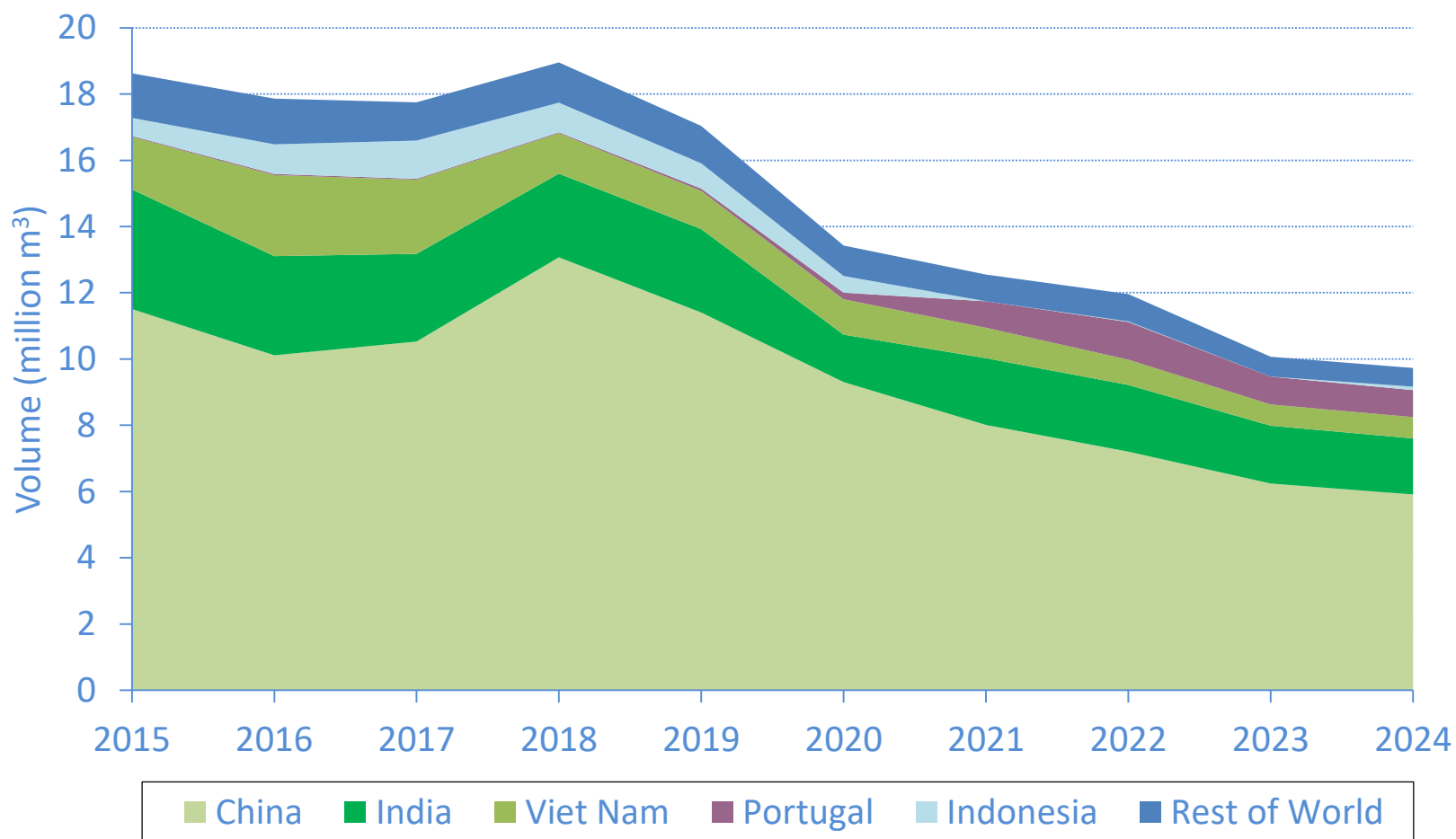


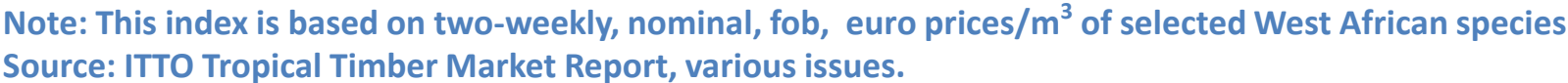
Major exporters of tropical logs, 2015-2024





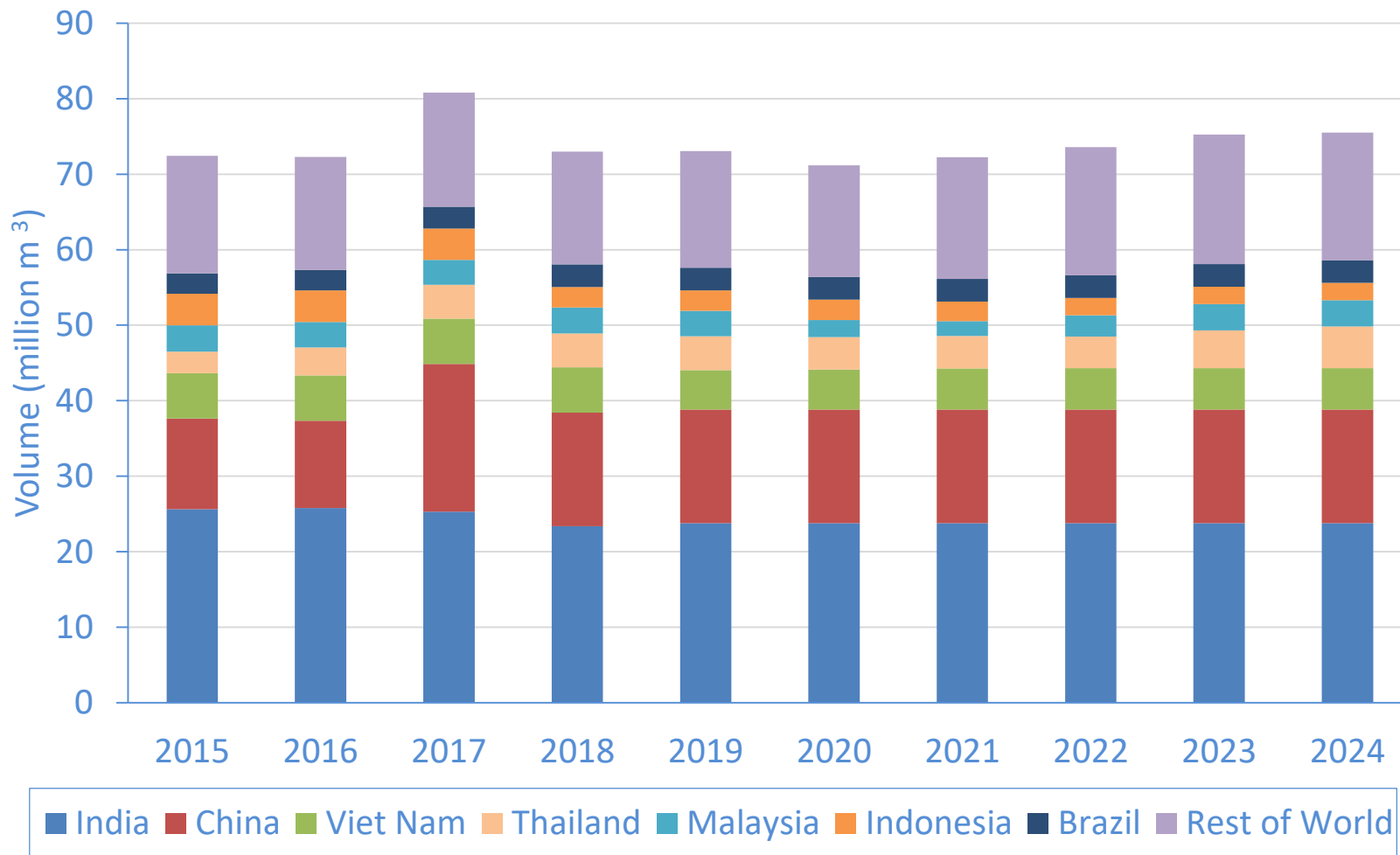
Major importers of tropical logs, 2015-2024



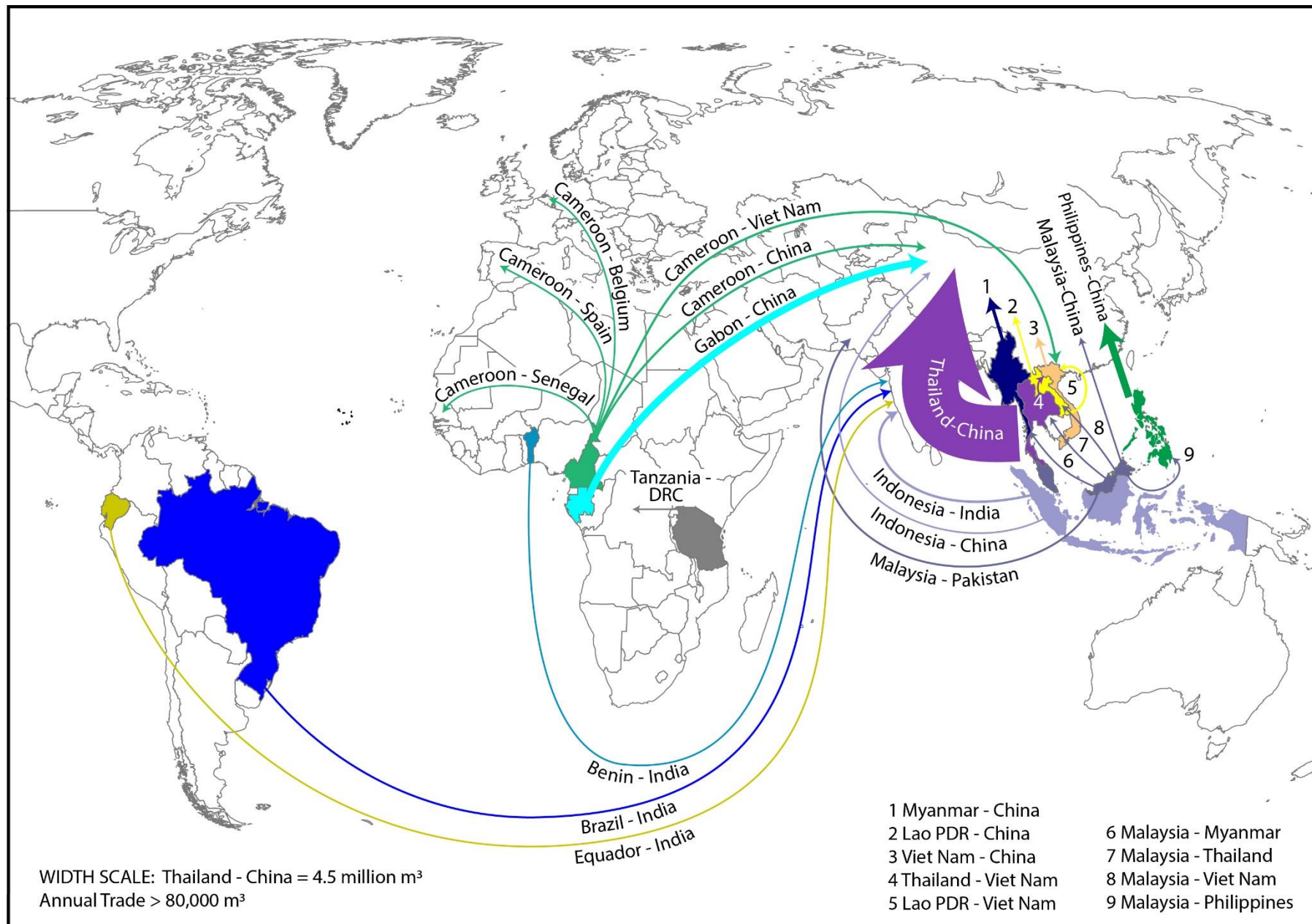




Production of tropical sawnwood, by major ITTO producer country and China, 2015-2024

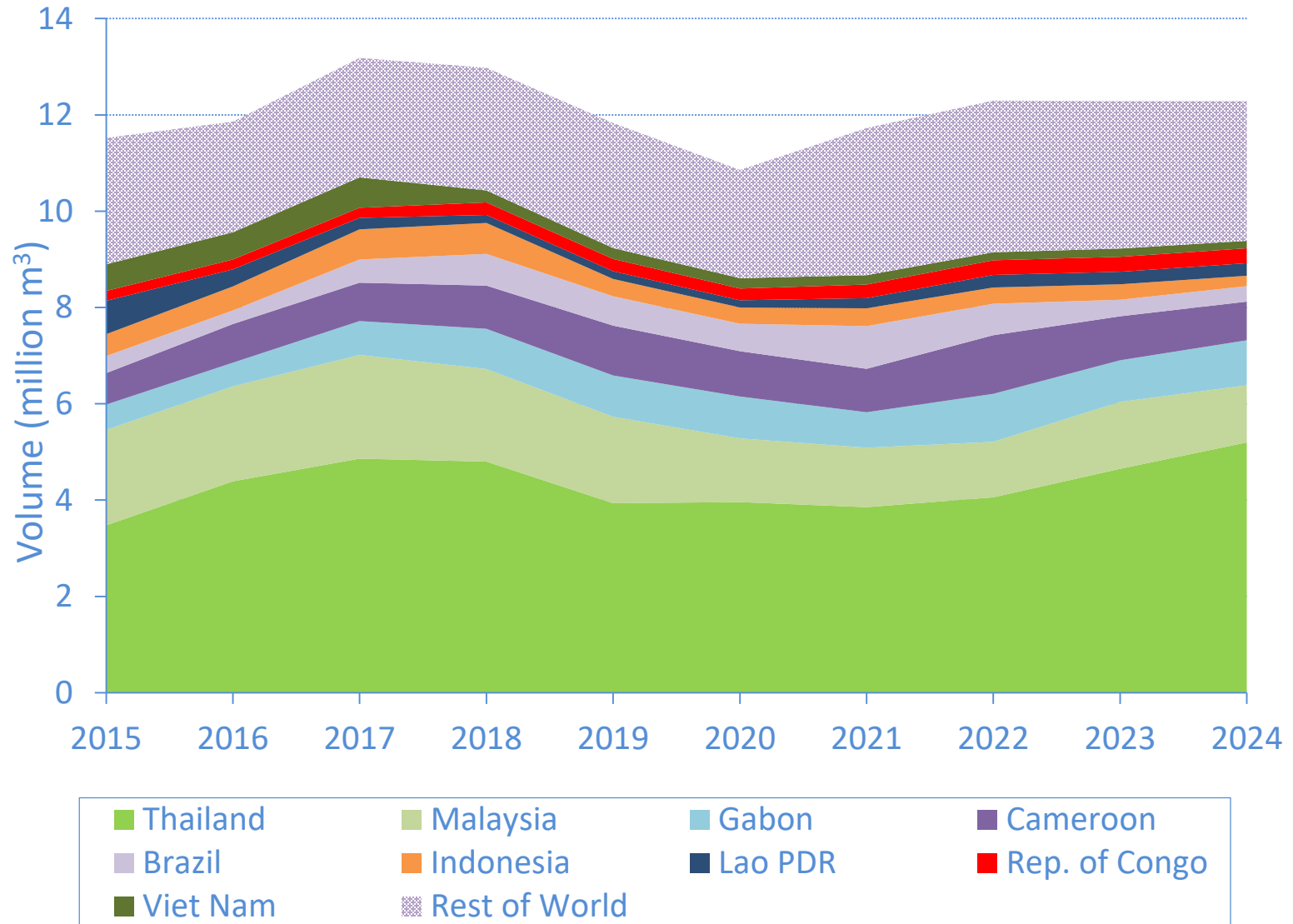


MAJOR TRADE FLOWS 2023: TROPICAL SAWNWOOD



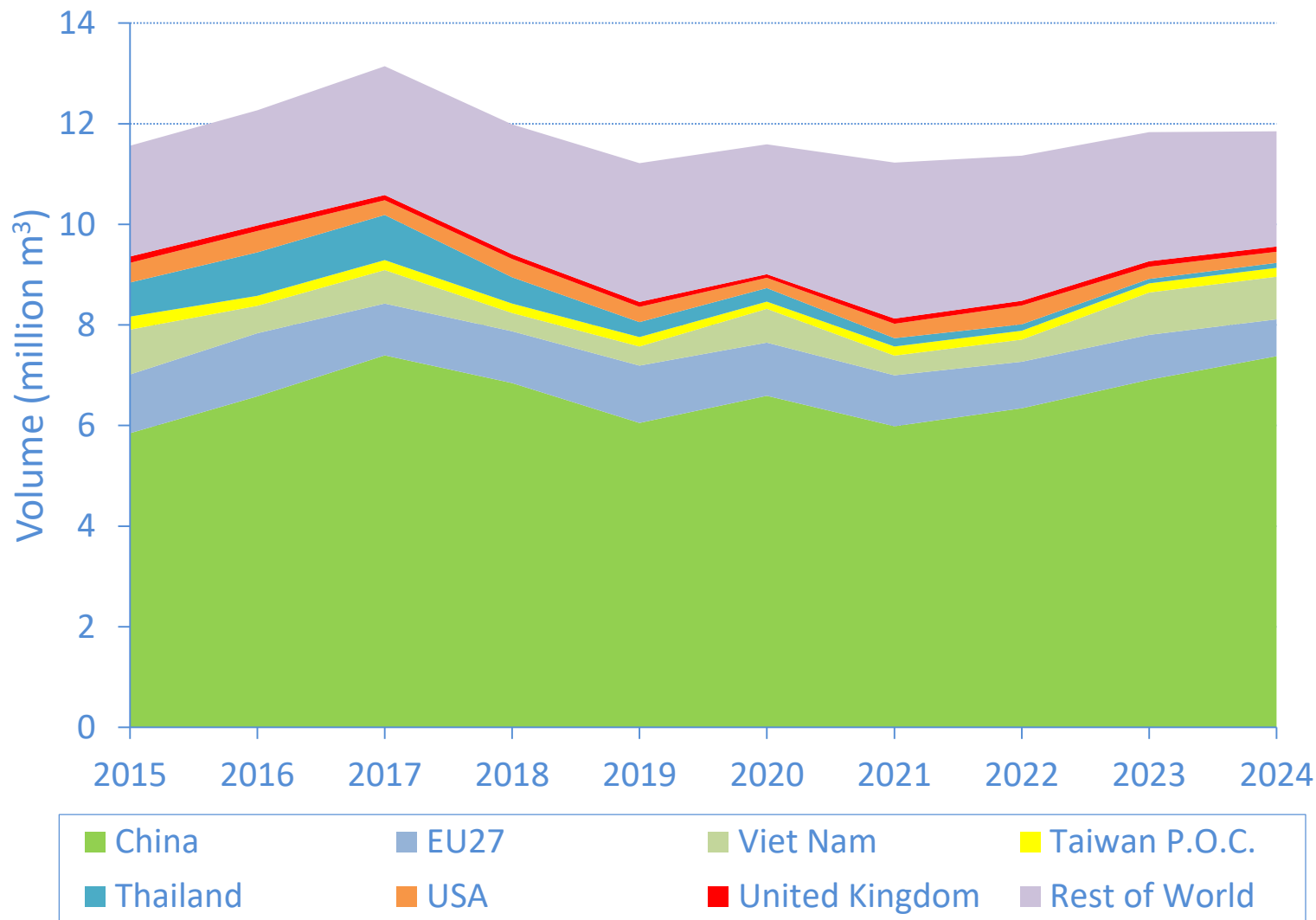


Tropical sawnwood exports, major tropical countries, 2015-2024



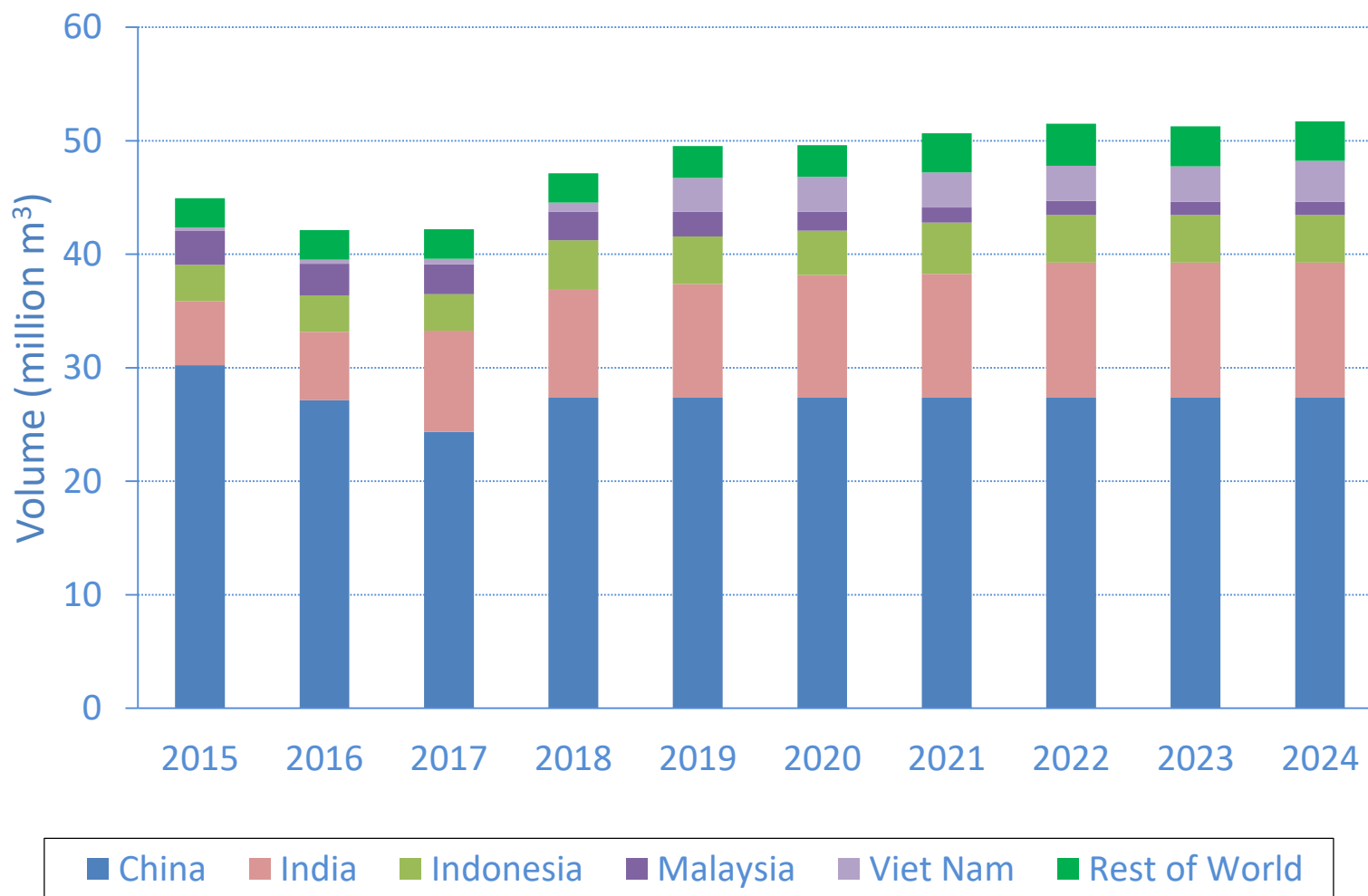


Tropical sawnwood imports, major ITTO countries 2015-2024

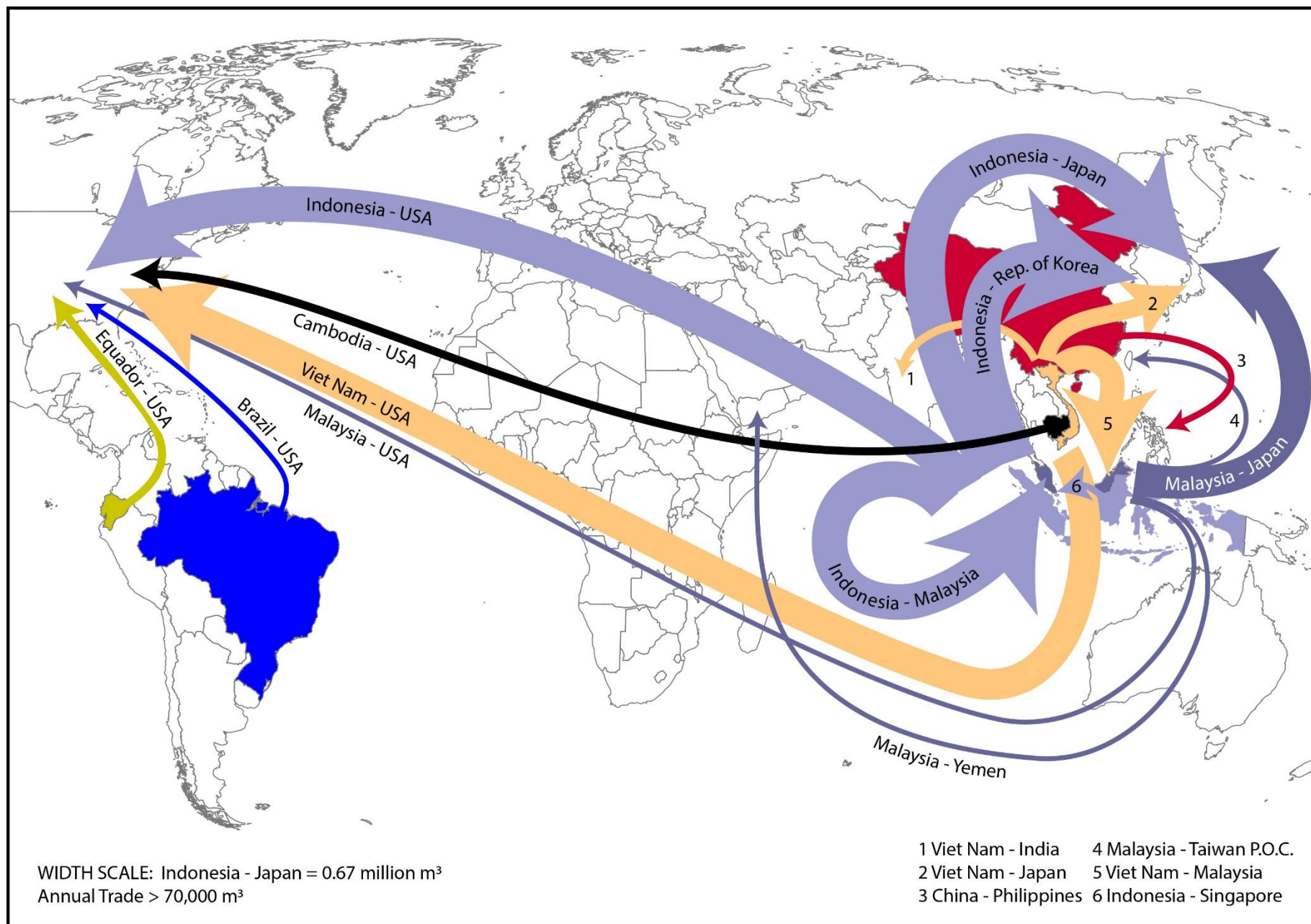




Production of tropical plywood, by major country, 2015-2024

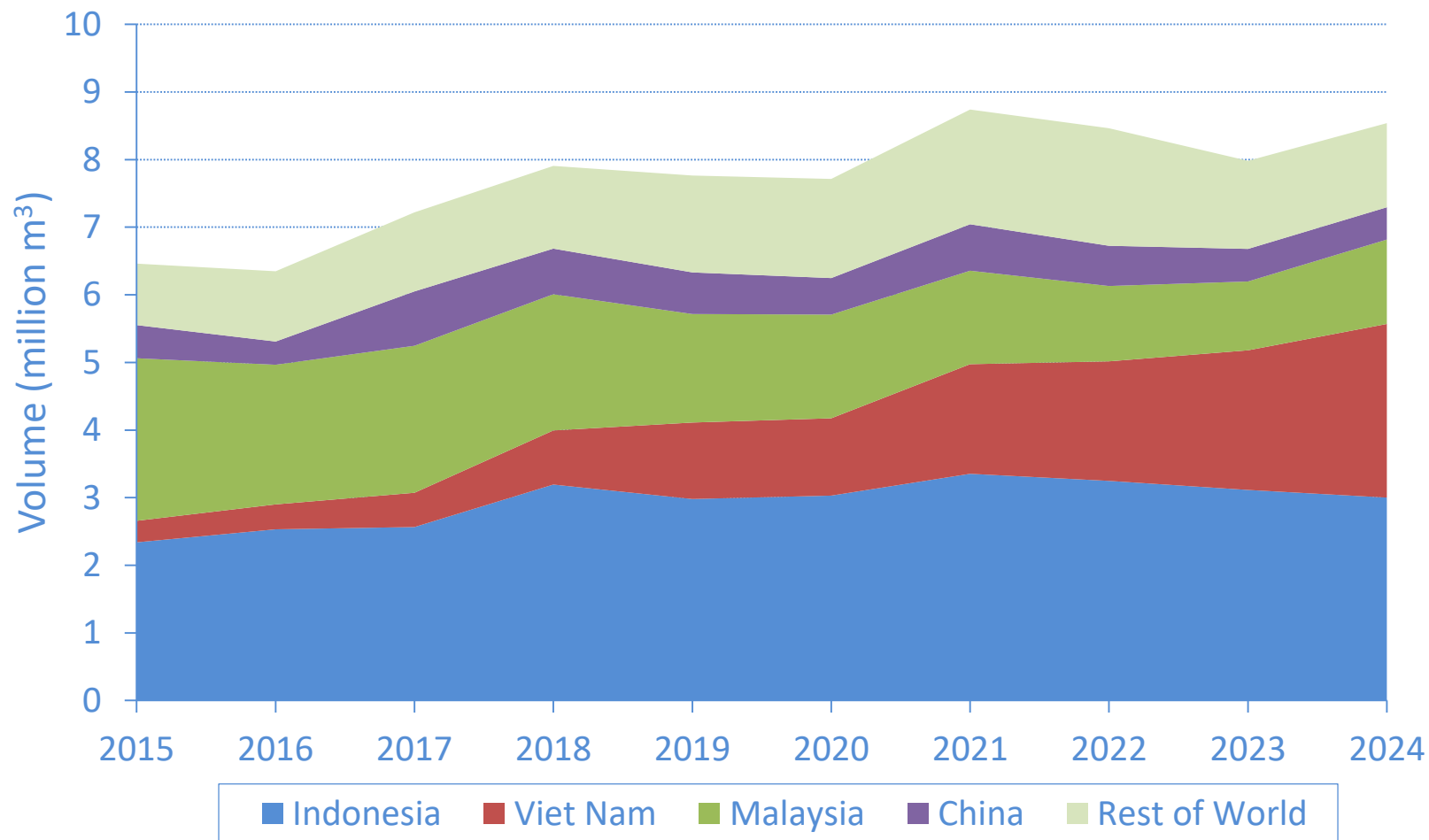


MAJOR TRADE FLOWS 2023: TROPICAL PLYWOOD



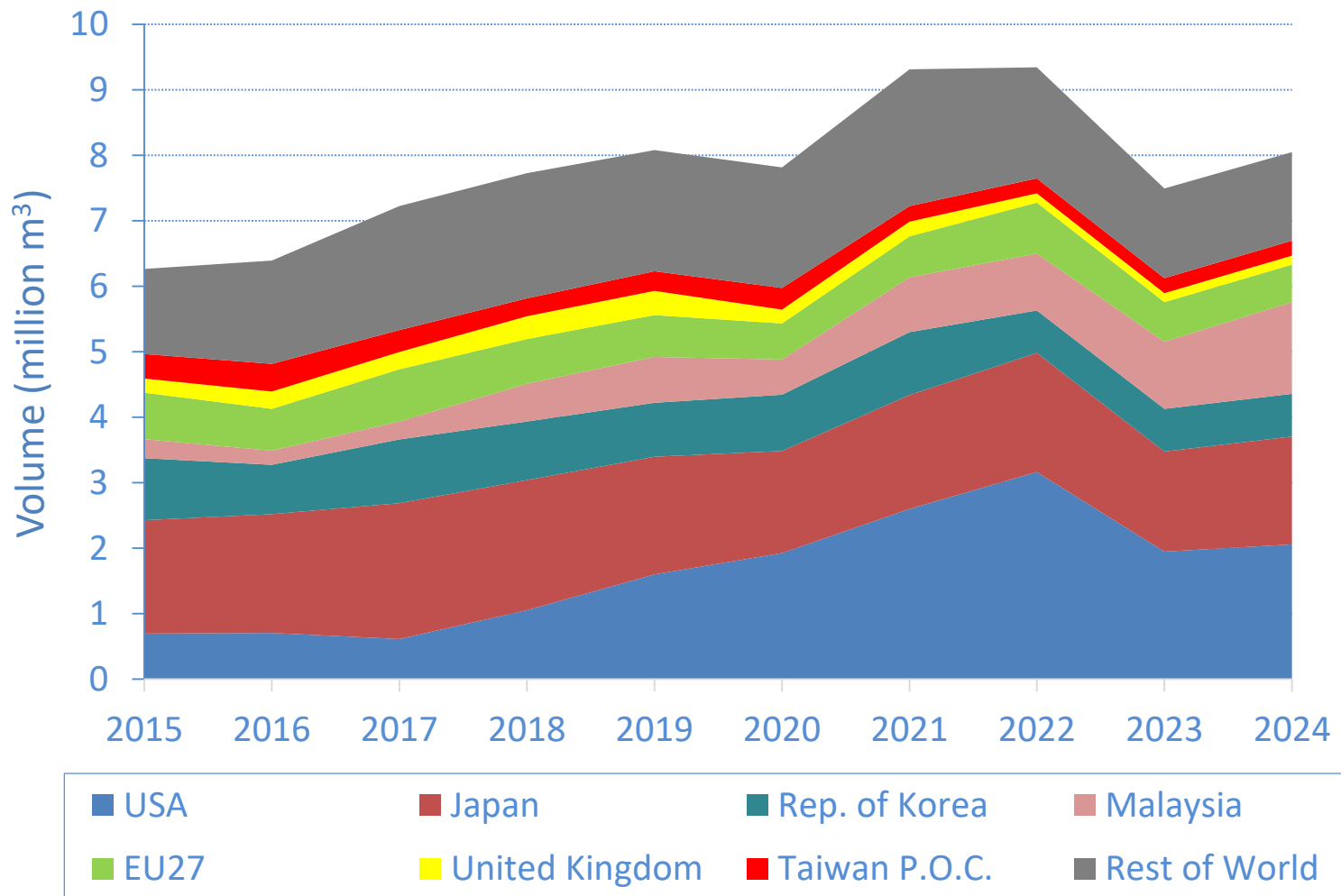


Major exporters of tropical plywood, 2015-2024



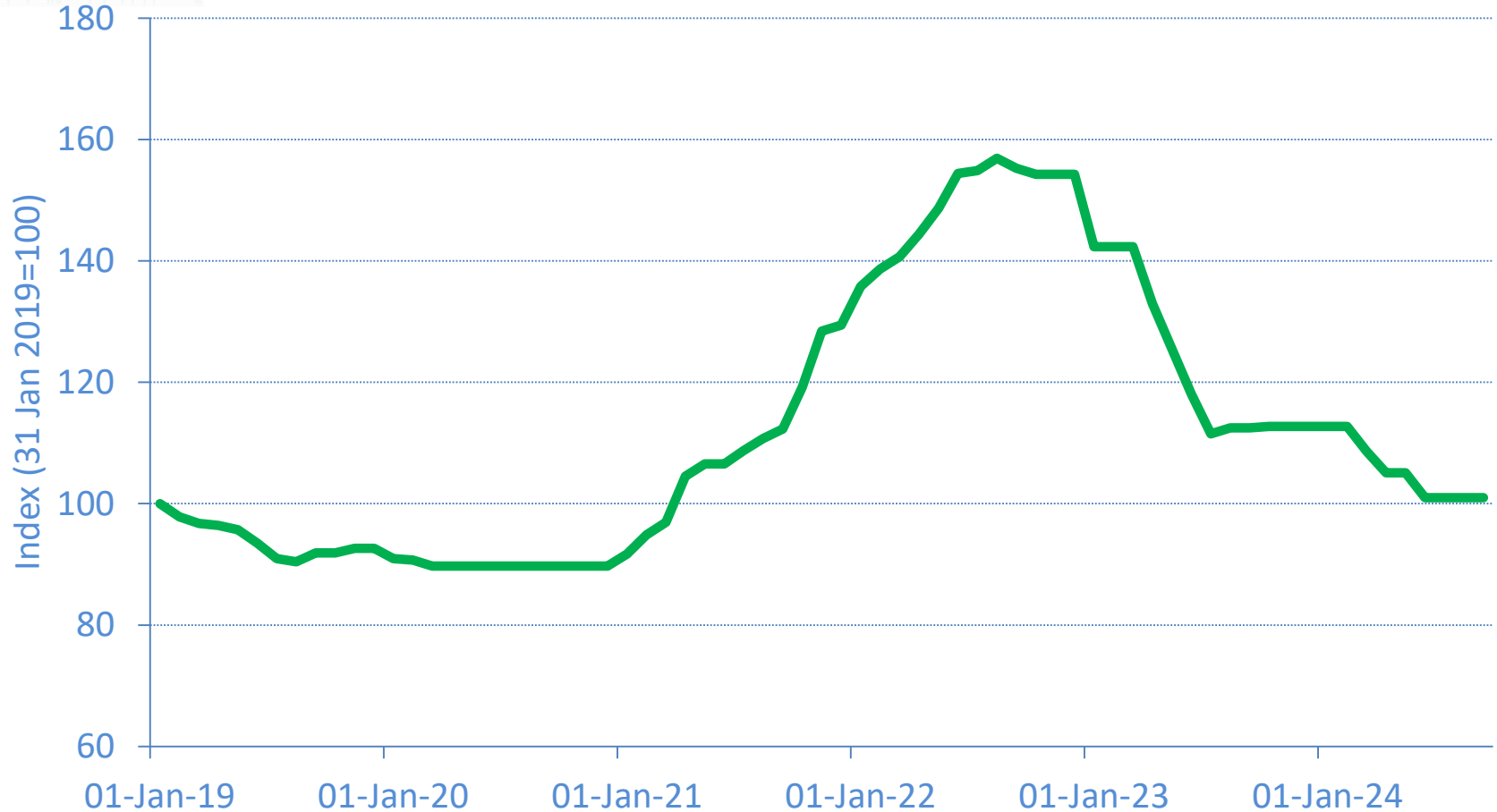


Major importers of tropical plywood, 2015-2024





Japan Plywood Import Price Index



NOTE: This index is based on two-weekly, fob, nominal dollar prices/m³ of Indonesian panels for concrete formwork (12 mm 3' x 6' JAS C&F), Indonesian floor bases (3' x 6' JAS C&F) and Indonesian thin panels (3' x 6' JAS C&F). **SOURCE:** Japan Lumber Reports, various issues.

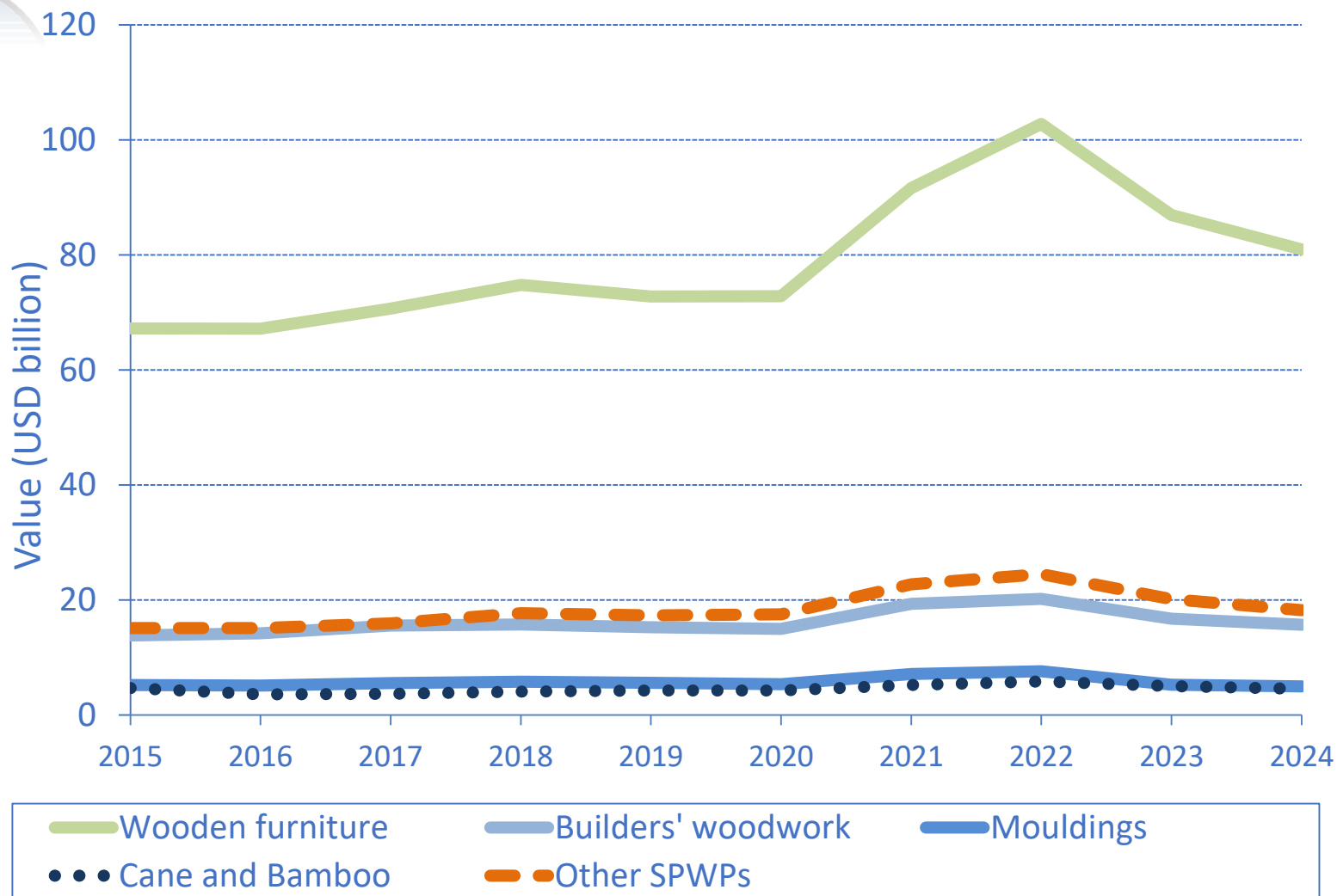


TRADE TRENDS: SECONDARY PROCESSED WOOD PRODUCTS



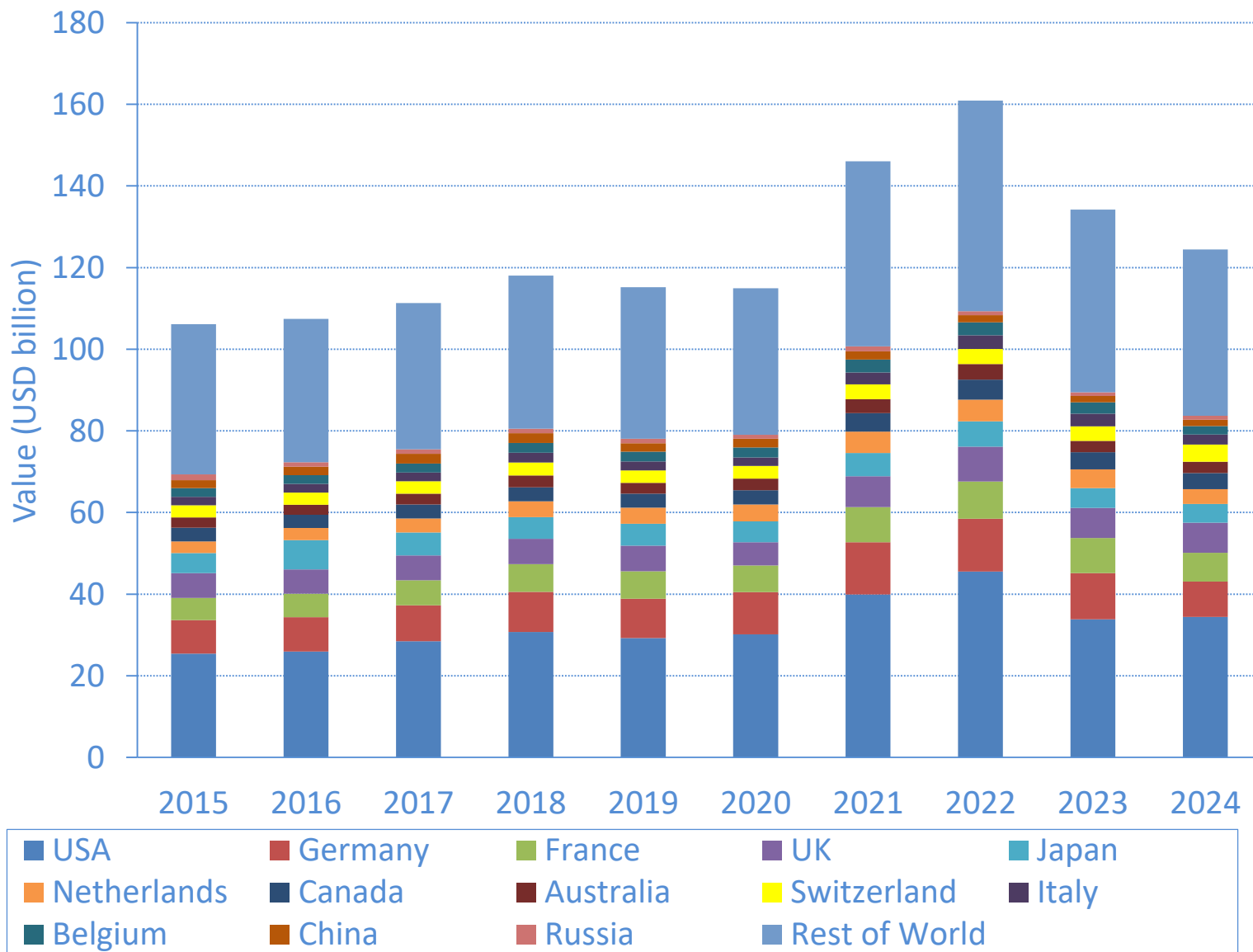


World imports of secondary processed wood products, 2015-2024



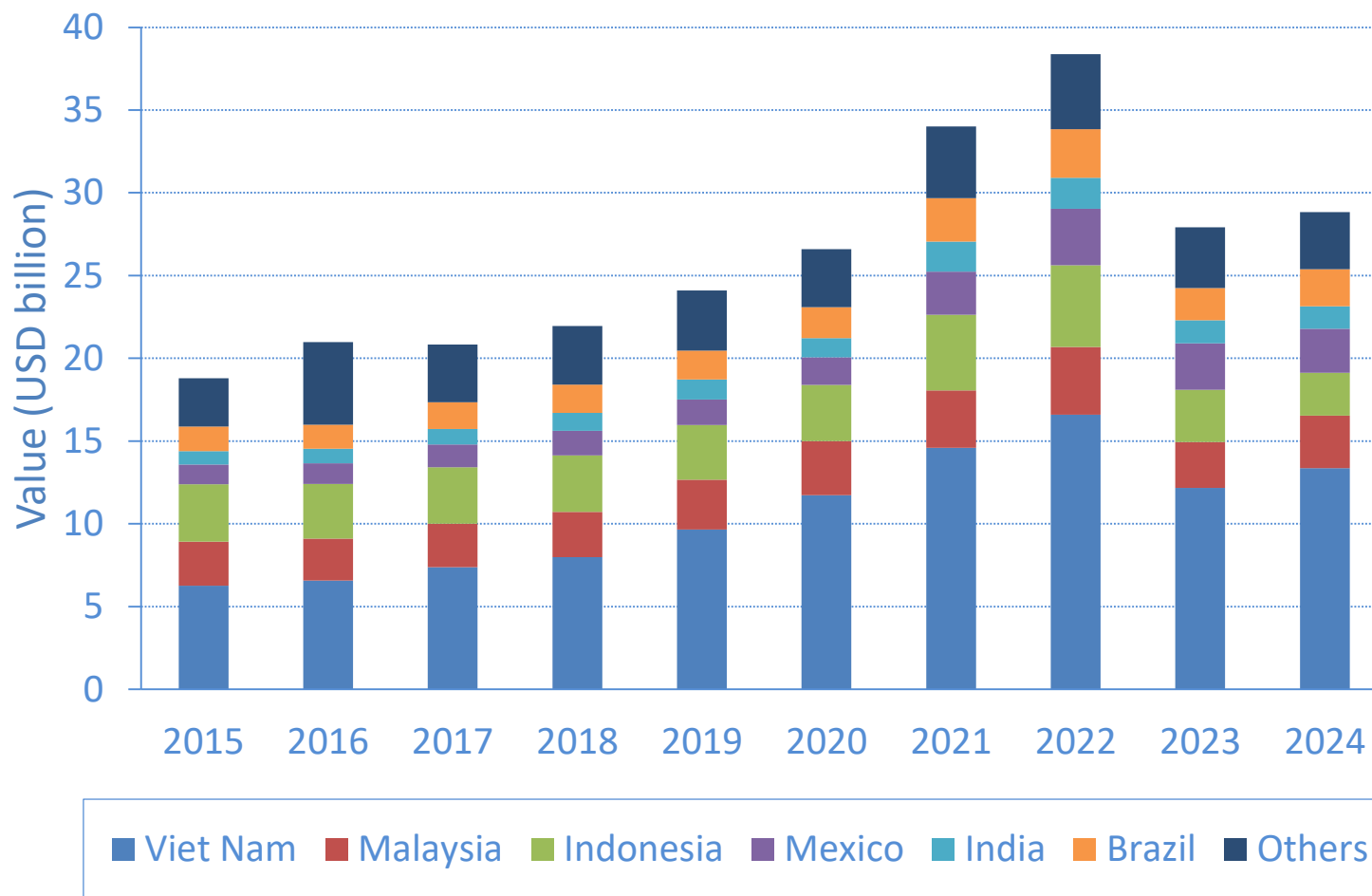


SPWP imports, by major ITTO importer, 2015-2024



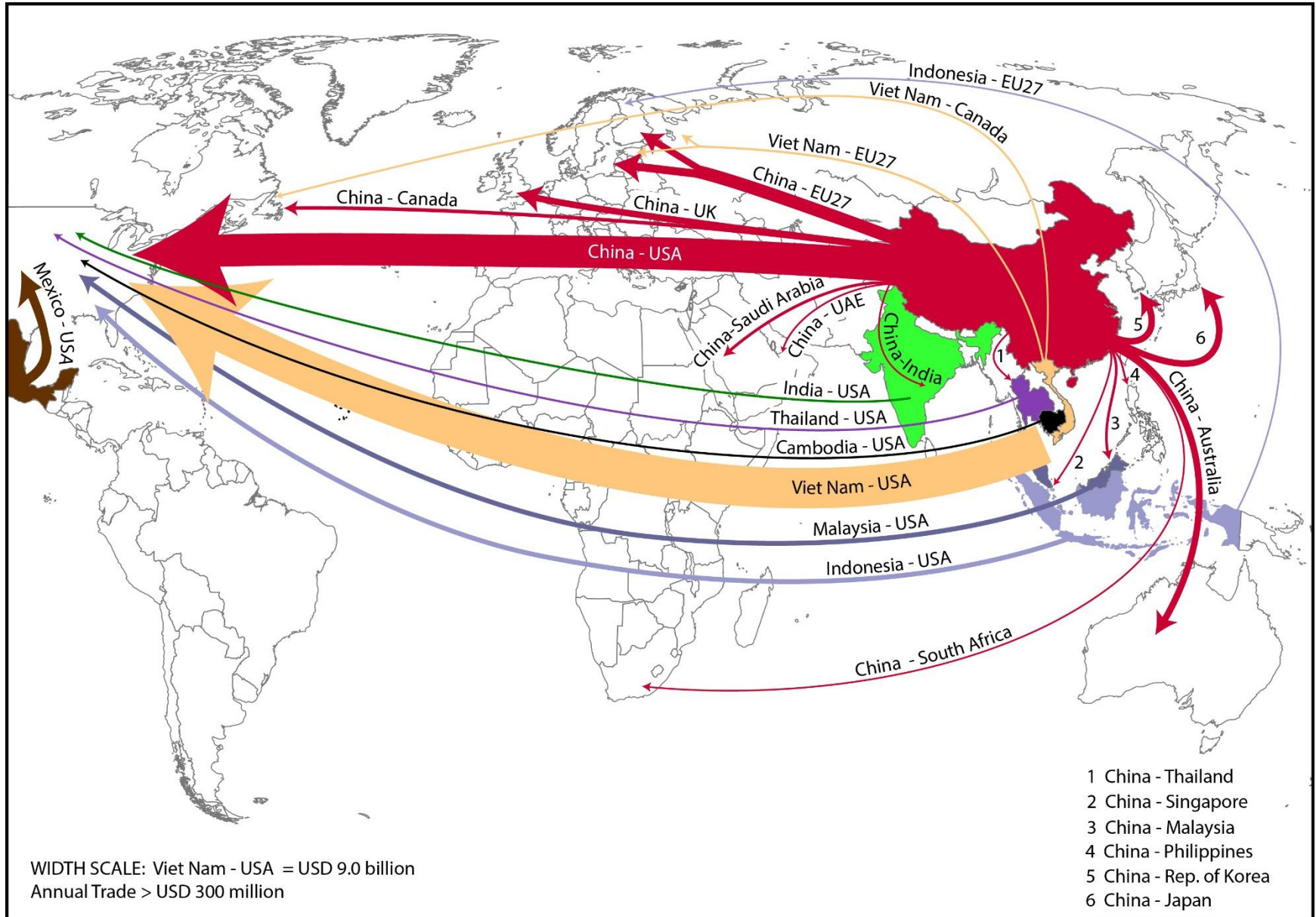


SPWP exports, by major ITTO producer, 2015-2024



MAJOR TRADE FLOWS 2023: WOODEN FURNITURE

from China and ITTO Producers





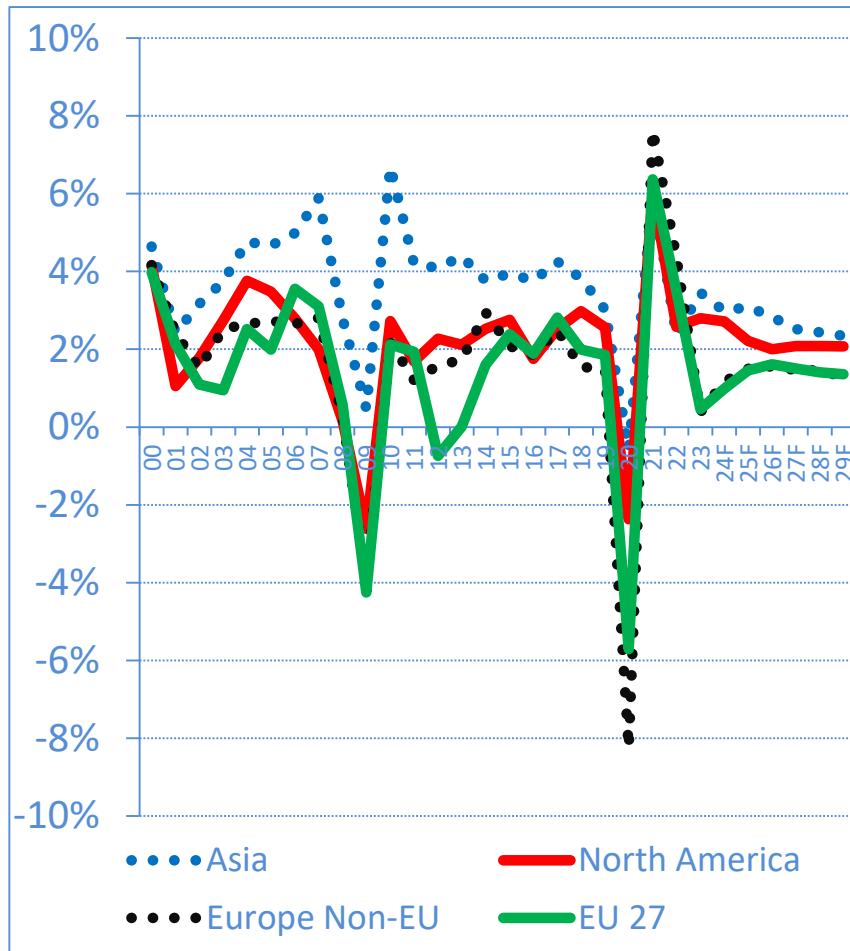
MARKET ISSUES



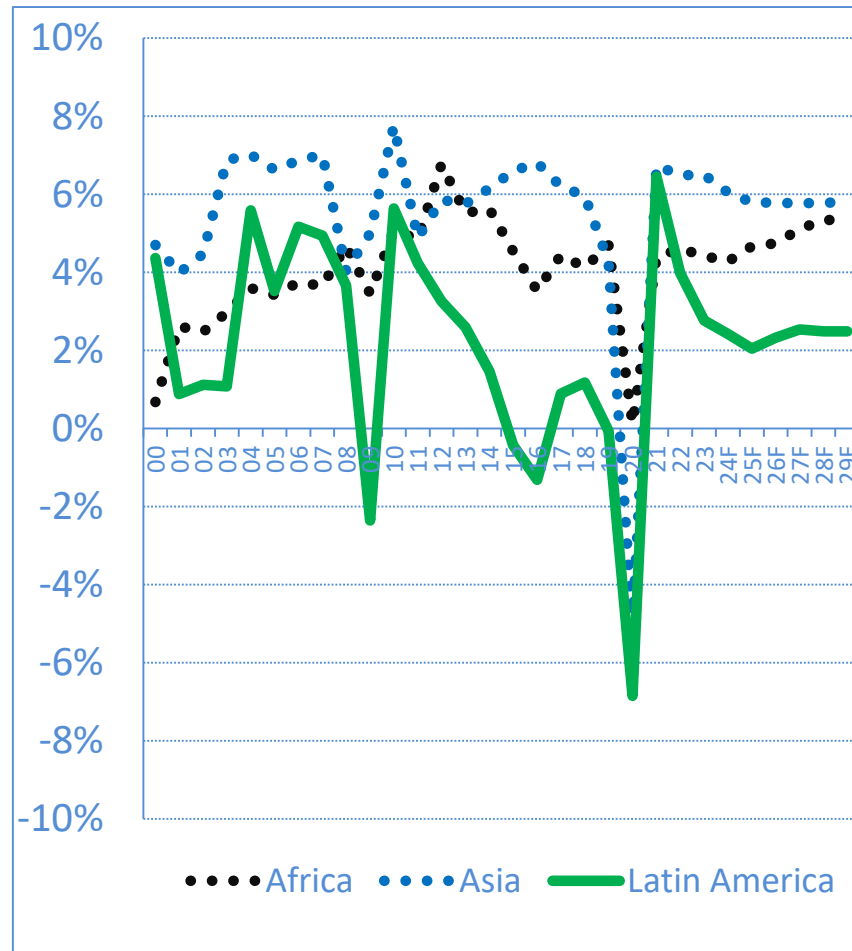


Real GDP growth, 2000-2029^F

ITTO Consumer Regions



ITTO Producer Regions





Market risks and uncertainty

- ☐ Geopolitical conflicts – global political and economic uncertainty
- ☐ Protectionist trade policies – United States
- ☐ Worsening of China's property sector crisis
- ☐ EUDR
- ☐ Elimination of illegally logged wood from supply chains
- ☐ Relative market competitiveness of competing wood and non-wood products
- ☐ Decline in tropical hardwood availability and quality
- ☐ Effectiveness of log export restrictions: value-added investment
- ☐ Energy prices
- ☐ Climate policies; extreme weather events



ITTO Biennial Review and Assessment of the World Timber Situation 2023-2024

Available at www.itto.int



itto-stats@itto.int