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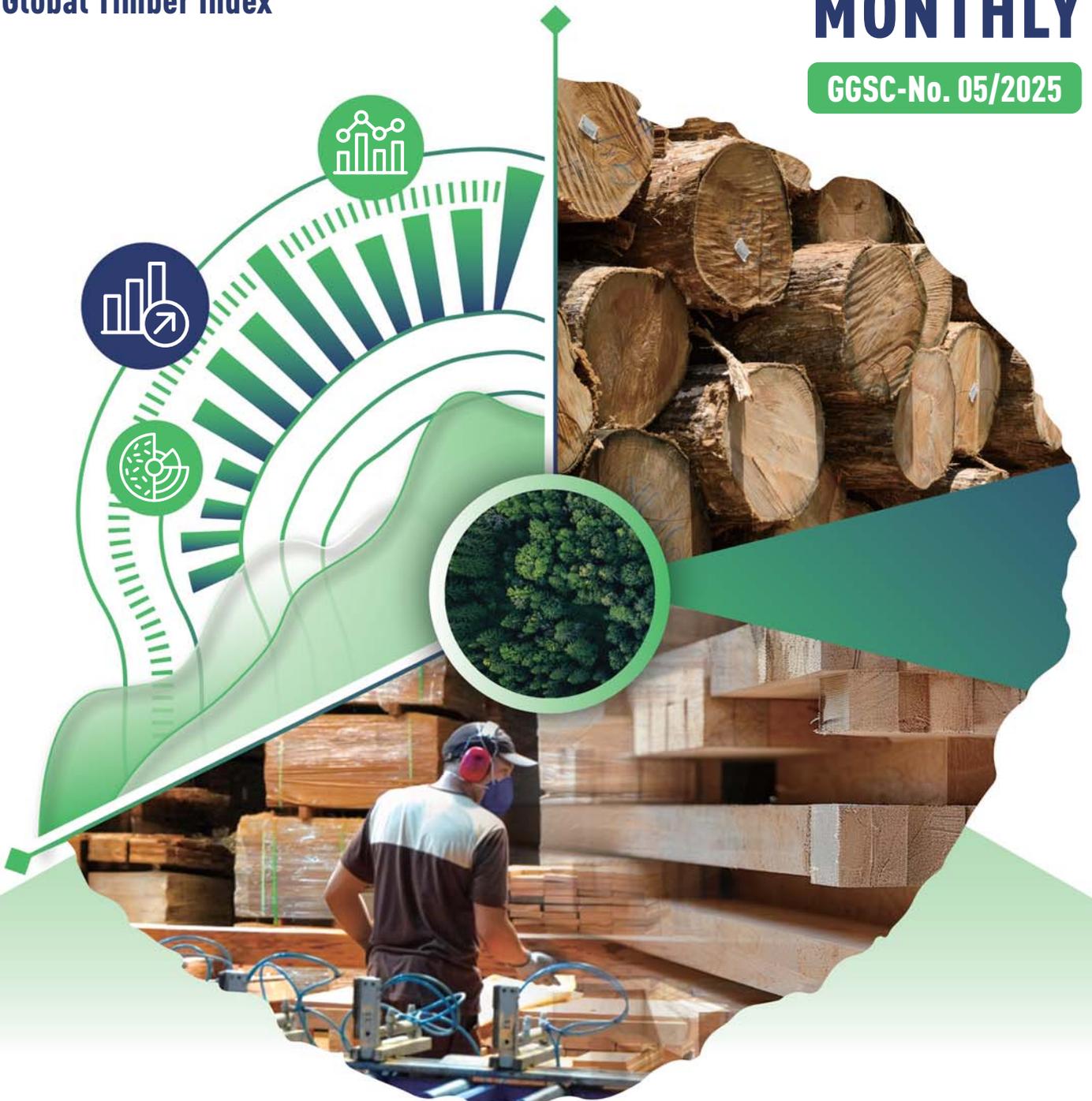
This report was prepared by GGSC, with support of ITTO and IPIM, and Focal Points of Indonesia, Malaysia, Thailand, Gabon, Republic of Congo, Ghana, Brazil, Mexico and China.

# GTI REPORT 2025

Global Timber Index

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## Indonesia

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## Malaysia

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- Thai Timber Association (TTA)

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- Ministry of Forest Economy

## Ghana

- Forestry Commission

## China

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## Mexico

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## Brazil

- STCP Engenharia de Projetos Ltda



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# **GTI REPORT 2025**

## **MAY**





# Global Legal & Sustainable Timber Forum 2025

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**23-24 September 2025**

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**Nkok Special Economic Zone, Libreville, Gabon**

# **Integrated Export Strategy for African Tropical Timber through Sustainable Sourcing and Global Warehouse Connectivity**



Green Wood Panel SA (Gabon), an associate of Greenply Industries Ltd (India), has implemented a transformative best practice model that integrates sustainable forestry, responsible manufacturing, and a global distribution network to promote African tropical timber in international markets.

Recognizing the growing demand for sustainable and traceable wood products, Green Wood Panel SA transitioned its operations from raw veneer exports to finished plywood manufacturing using Okoume, a native species of Gabon. This vertical integration was coupled with forest stewardship practices aligned with Gabonese legal frameworks and international compliance such as FSC and TLAS standards.

To enhance transparency and traceability, Green Wood Panel SA implemented a digital log tracking system from forest to factory, ensuring every log used is verifiably legal and sustainably harvested. It also equipped its facility with energy-efficient machinery to reduce carbon emissions and minimize waste.

A core innovation in its model lies in creating bonded warehouse hubs in Europe (Belgium, Italy, and Spain) and the Middle East (Dubai), allowing real-time delivery to customers while optimizing working capital. This decentralization of inventory reduces lead times, enhances customer satisfaction, and supports just-in-time inventory models in the construction and furniture industries.

Green Wood Panel SA also initiated community development programs around its concession zones in Gabon—employing local labor, providing training, and supporting social services such as healthcare access and educational support.

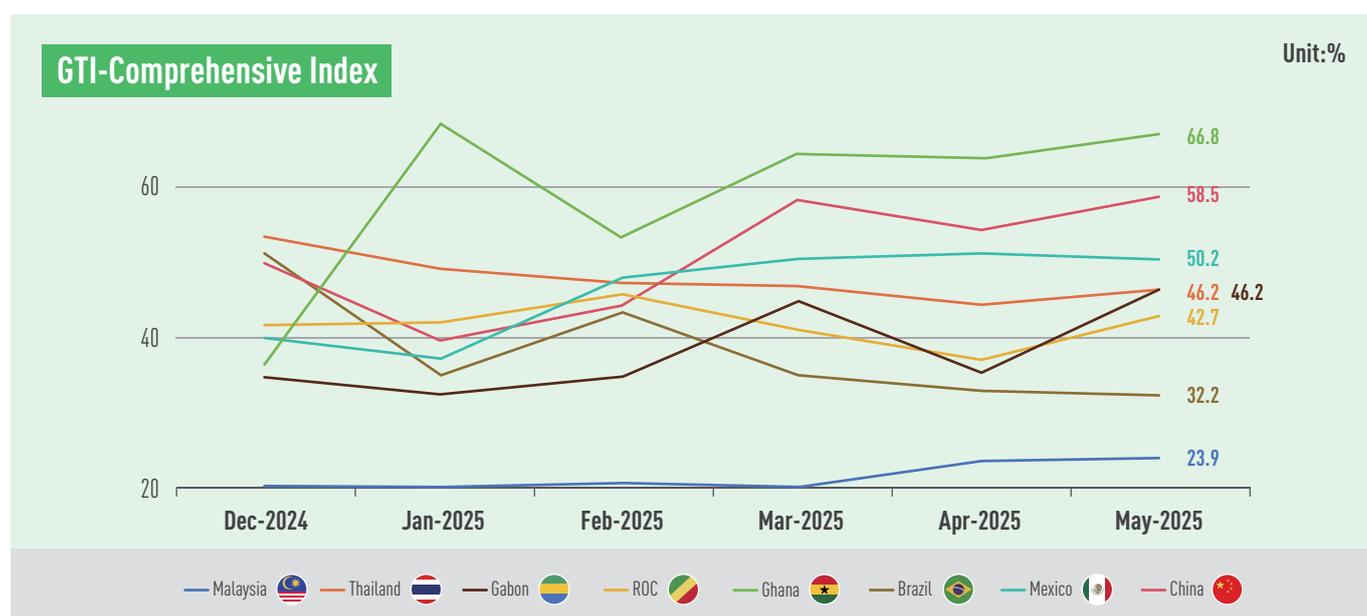
What makes it a Best Practice? It combines legal forestry, value-added local manufacturing, and global distribution hubs to create a replicable and scalable model of sustainable African timber trade. It aligns environmental sustainability with economic development, benefiting both producers and global buyers.

**The best practice above has been provided by Green Wood Panel SA in Nkok Special Economic Zone, Gabon. We also appreciate the support from Gabon's Ministry of Water and Forests, responsible for the climate plan and land use (GTI focal point in Gabon), for their contribution to the GTI Platform. For further information on this best practice, please contact Indraneel Bhan at [indraneel.bhan@greenplyafrica.com](mailto:indraneel.bhan@greenplyafrica.com).**



## Overview of the GTI Index

### Ghana stands out in global timber sector's upward trend with GTI at 66.8%



The Global Timber Index (GTI) Report for May 2025 revealed a continuous upward trend in the timber sectors of Ghana, China, and Mexico. The GTI for Ghana stood at 66.8%, remaining in positive territory (>50%) for the fifth consecutive month. For China and Mexico, the GTIs were at 58.5% and 50.2%, respectively, both above the 50% critical value for three consecutive months. However, the GTIs for Gabon (46.2%), Thailand (46.2%), the Republic of the Congo (42.7%), Brazil (32.2%), and Malaysia (23.9%) remained in the contraction territory. Positive signs were evident in some GTI sub-indices. For example, harvesting volume in Ghana and Mexico rose for the third consecutive month; production volume in Gabon increased significantly compared to the previous month, coupled with lower inventory pressure; Thailand's domestic market improved; and China saw a three-month growth in export market.

On 22 May, the European Commission officially released the list of country risk classifications under the EU Deforestation Regulation (EUDR), categorizing countries according to the level of risk. Indonesia, Malaysia, Brazil, and Mexico are in standard risk category, while Thailand, Gabon, the Republic of the Congo (ROC), Ghana, and China are identified as "low risk". The Mexican government emphasized that its standard-risk status would not pose a threat to the export of Mexican goods, and consultations had already begun with domestic producers and exporters to offer technical guidance and ensure regulatory compliance. According to news from local media, Mexico's Ministry of Agriculture and Rural Development had already established agreements with key related

value chains to commit to 100% deforestation-free production. Additionally, a traceability system was being put in place to support these efforts.

In response to U.S. tariff policies, many countries had strengthened origin monitoring measures to protect domestic industries. In Malaysia, the Deputy Plantation and Commodities Minister Chan Foong Hin said the government would tighten enforcement to prevent Malaysia from being used as a transshipment hub for timber and timber products, and among the steps being taken are stricter documentation processes, especially for the issuance of Certificates of Origin (COO). In Thailand, the Department of Foreign Trade had expanded the list of products exported to the U.S. that require strict origin verification from 49 to 65 items, covering a total of 224 HS codes. For products on this list, such as furniture, the U.S. demands clear and specific code information, rather than just broad descriptions, and failure to comply may result in losing the export opportunity. In other news, in response to concerns about the possibility of trade diversion as a result of U.S. tariff policies, the Brazilian government was intensifying its monitoring of risks and opportunities for the Brazilian furniture industry, with the aim of quickly identifying possible atypical import flows, and ensuring all sensitive tariff positions are considered in strategic planning and the survey of defense measures.

1. The Global Timber Index (GTI) is an index system that comprehensively reflects the overall trend of global timber production and trade. It is completed by the participation of major ITTO timber producers and consumers members. The survey covers timber harvesting, trade, manufacturing including production, orders, imports and exports, employees, inventory and raw material prices and other business indicators. It is of a great significance as a guide to business operations, industry investment, and will aid formulation of national policies.

2. The GTI index reflects the monthly prosperity trend of a country's timber market. It does not reflect the competitiveness of a country's timber market, can not be used for ranking or comparing the timber market among countries.



## GTI-Malaysia Index in May 2025



### GTI-Malaysia Comprehensive Index

Unit: %



In April, Malaysia's trade value rose 18.2% year-on-year to RM261.94 billion, the highest monthly value recorded since August 2022. Exports increased by 16.4% to RM133.56 billion, while imports climbed 20% to RM128.37 billion. This marked the 60th consecutive month of trade surplus, reaching RM5.19 billion. When talking about the impact of the US's latest round of tariffs, Malaysia's Investment, Trade and Industry Minister identified eight industries, including furniture, which bear the brunt. He also noted that Malaysia is deepening engagement with BRICS nations, the MERCOSUR bloc in South America, and fast-growing regions in Africa, so as to diversify the country's export destinations and reduce exposure to external shocks. Deputy Plantation and Commodities Minister Chan Foong Hin said the government will tighten enforcement to prevent Malaysia from being used as a transshipment hub for timber and timber products originating from countries hit with higher US tariffs. Among the steps being taken are stricter documentation processes, especially for the issuance of Certificates of Origin (COO). In other news, according to news from Malaysian Furniture Council, local manufacturers also face rising costs, including a 14.2% hike in electricity tariffs from July 2025, higher EPF contributions and increased foreign worker levies.

In May 2025, the GTI-Malaysia index registered 23.9%, an increase of 0.4 percentage point from the previous month, was below the critical value (50%) for many months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Malaysia index shrank from the previous month.

As for the twelve sub-indexes, the index for purchase price was above the critical value of 50%, the index for inventory of finished products was at the critical value of 50%, while the remaining ten

indexes (harvesting, production, new orders, export orders, existing orders, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation) were all below the critical value. Compared to the previous month, the indexes for production, existing orders, inventory of finished products, purchase price, inventory of main raw materials, employees, and market expectation increased by 3.4-21.5 percentage points; the index for harvesting was unchanged from the previous month; and the indexes for new orders, export orders, purchase quantity, and delivery time declined by 2.8-11.8 percentage points.



Re-saw in Tan Chee Seng Sawmill, Malaysia. Photo: Khairul Nizam

**Table: Overview of GTI-Malaysia Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	20.3	20.1	20.6	20.1	23.5	23.9	0.4 ↑	Contract
Harvesting Index	0.0	7.1	14.3	14.3	21.4	21.4	0.0	Contract
Production Index	12.5	12.5	18.8	18.8	18.8	22.2	3.4 ↑	Contract
New Orders Index	30.0	30.0	25.0	25.0	30.0	18.2	-11.8 ↓	Contract
Export Orders Index	25.0	20.0	25.0	25.0	35.0	25.0	-10.0 ↓	Contract
Existing Orders Index	30.0	30.0	35.0	35.0	35.0	40.9	5.9 ↑	Contract
Inventory Index of Finished Products	50.0	50.0	50.0	50.0	45.0	50.0	5.0 ↑	Stable
Purchase Quantity Index	27.8	27.8	22.2	22.2	33.3	25.0	-8.3 ↓	Contract
Purchase Price Index	55.6	61.1	44.4	38.9	38.9	55.0	16.1 ↑	Expand
Inventory Index of Main Raw Materials	16.7	16.7	11.1	5.6	6.3	27.8	21.5 ↑	Contract
Employees Index	20.0	15.0	20.0	20.0	25.0	31.8	6.8 ↑	Contract
Delivery Time Index	16.7	22.2	22.2	22.2	27.8	25.0	-2.8 ↓	Contract
Market Expectation Index	-	5.0	10.0	15.0	15.0	22.7	7.7 ↑	Contract



### Main Challenges Reported by GTI-Malaysia Enterprises

- There was an increase in labour costs.
- The exchange rate was unstable.
- The demand for wood was low.
- There was a shortage of logs suitable for producing face veneer.
- Orders decreased, and costs for freight to USA increased.
- The market was on hold.
- There was a shortage of plywood demand for export, and at the same time, there was a lack of logs.
- Stagnant raw material prices and increasing maintenance costs posed challenges for some enterprises.



### Main Suggestions from GTI-Malaysia Enterprises

- Conduct more effective marketing.
- Slow down production.
- Retain woodchips for local consumption.
- Suggest that the government increase spending on building and infrastructure expansion, so as to increase consumption of building materials and sawnwood.
- Offer special promotions to loyal customers, source from alternative suppliers with lower prices and schedule regular maintenance to prevent costly major breakdowns.



## GTI-Thailand Index in May 2025



### GTI-Thailand Comprehensive Index

Unit: %



Recently, the Thai Cabinet approved urgent revisions to the Foreign Business Act B.E. 2542 (1999), aiming to adapt to the evolving economic landscape and attract high-quality foreign investment by easing restrictive regulations, and it is reported that relevant authorities are considering an increase in the allowable foreign equity threshold, which is currently limited to 49% in many restricted sectors. In other news, Thailand's Department of Foreign Trade had expanded the list of products exported to the U.S. that require strict origin verification from 49 to 65 items, covering a total of 224 HS codes. For products on this list, such as furniture, the U.S. demands clear and specific code information, rather than just broad descriptions, and failure to comply may result in losing the export opportunity. Recently, the Thai government reduced the registration fees for the transfer and mortgage of properties from 2% to 0.01%, effect from 22 April 2025 to 30 June 2026, aiming to ease the financial burden on homebuyers and stimulate the real estate market.

In May 2025, the GTI-Thailand index registered 46.2%, an increase of 1.1 percentage points from the previous month, was below the critical value (50%) for 5 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Thailand index shrank from the previous month. In the middle of this month, Thailand entered the rainy season, which led to a further decline in the volume of harvesting. However, production in the timber sector was largely stable. On the demand side, the export market stabilized after a period of decline, while the domestic market saw an increase in demand.

As for the twelve sub-indexes, two indexes (new orders, and purchase price) were above the critical value of 50%, two other indexes (production, and export orders) were at the critical

value, while the remaining eight indexes (harvesting, existing orders, inventory of finished products, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation) were all below the critical value. Compared to the previous month, the indexes for production, new orders, export orders, and purchase price increased by 5.8-12.5 percentage points, and the indexes for harvesting, existing orders, inventory of finished products, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation declined by 2.9-12.2 percentage points.



Rong Kwang Sawmill in Phrae, Thailand. Photo: Forest Industry Organization (FIO)

**Table: Overview of GTI-Thailand Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	53.3	49.0	47.1	46.7	45.1	46.2	1.1 ↑	Contract
Harvesting Index	38.9	39.3	50.0	50.0	45.5	33.3	-12.2 ↓	Contract
Production Index	54.5	52.6	53.6	50.0	37.5	50.0	12.5 ↑	Stable
New Orders Index	62.5	55.3	50.0	52.9	47.1	52.9	5.8 ↑	Expand
Export Orders Index	60.0	71.4	37.5	50.0	41.7	50.0	8.3 ↑	Stable
Existing Orders Index	42.3	40.0	46.7	47.1	41.2	38.2	-3.0 ↓	Contract
Inventory Index of Finished Products	34.6	50.0	30.0	38.2	38.2	35.3	-2.9 ↓	Contract
Purchase Quantity Index	45.8	50.0	46.2	46.7	46.7	37.5	-9.2 ↓	Contract
Purchase Price Index	53.8	63.2	67.9	46.9	46.7	53.1	6.4 ↑	Expand
Inventory Index of Main Raw Materials	38.5	44.7	17.9	34.4	40.6	34.4	-6.2 ↓	Contract
Employees Index	42.3	40.0	50.0	41.2	50.0	41.2	-8.8 ↓	Contract
Delivery Time Index	57.7	45.0	46.4	44.1	50.0	41.2	-8.8 ↓	Contract
Market Expectation Index	50.0	42.5	50.0	38.5	50.0	41.2	-8.8 ↓	Contract



### Main Challenges Reported by GTI-Thailand Enterprises

- The US tariff policies posed challenges.
- Orders for some enterprises decreased.
- There was a lack of raw materials.
- Continuous rainfall affected logging.
- Relevant legal framework was complicated.
- There was a lack of labor, especially skilled workers.
- Employee leave (e.g., sick leave for a long period of time) impacted production.
- The real estate business operated at a low level, and it would still face many challenges in the future, including oversupply, low customer purchasing power, and strict bank lending controls.



### Main Suggestions from GTI-Thailand Enterprises

- Find new markets.
- Attend more exhibitions.
- Increase product diversity.
- Conduct due diligence.
- Train other potential employees to be able to temporarily take on responsibilities of those on leave.
- The government should accelerate trade negotiations and reach a conclusion for a clearer direction.
- The government should cooperate with relevant parties to find ways to prevent and solve problems of enterprises.
- The factory should optimize production and operations, such as reducing costs, increasing work efficiency, actively maintaining relationships with potential customers, and trying to develop products using wood materials and wood scraps that are in stock.



## GTI-Gabon Index in May 2025



On 27 May, Gabon and the Food and Agriculture Organization of the United Nations (FAO) signed a Country Programming Framework for the period 2023-2027. The strategic framework, with a projected budget of US\$10 million, includes a cooperation to promote the sustainable management of natural resources, advance eco-friendly agriculture and reduce pressure on soil, forests and water resources. Of a total of 190.5 billion CFA francs from project loans this year, Gabon plans to allocate 59% to the fields of roads, construction and public works, that is, 36.9% of the total loan are dedicated to road infrastructure and 22.1% to construction, according to Gabon's "State Debt Strategy" document for this year. At the Africa Ports Forum 2025, the Office of Ports and Harbors of Gabon (OPRAG) announced the launch of a revival plan for logistics. According to its Director General, OPRAG would provide infrastructure and services tailored to key sectors such as timber, minerals and agriculture through a "smart and specialized logistics corridor" approach.

In May 2025, the GTI-Gabon index registered 46.2%, an increase of 11.0 percentage points from the previous month, was below the critical value (50%) for many months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Gabon index shrank from the previous month, however, the contraction had eased.

This month, Gabon saw a significant increase in timber production. Although the volume of new orders decreased from the previous month, the contraction in both domestic and international markets eased.

As for the twelve sub-indexes, two indexes (production, and market expectation) were above the critical value of 50%, three indexes (purchase price, inventory of raw materials, and delivery time) were at the critical value, while the remaining seven indexes (harvesting, new orders, export orders, existing orders, inventory of finished products, purchase quantity, and employees) were all below the critical value. Compared to the previous month, the indexes for production, new orders, export orders, existing orders, inventory of finished products, inventory of main raw materials, employees, and market expectation increased by 1.1-22.9 percentage points; the indexes for purchase price and delivery time were unchanged from the previous month; and the indexes for harvesting and purchase quantity declined by 4.4-23.3 percentage points.

**Table: Overview of GTI-Gabon Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	34.7	32.4	34.7	44.7	35.2	46.2	11.0 ↑	Contract
Harvesting Index	23.1	36.7	25.0	46.4	44.4	40.0	-4.4 ↓	Contract
Production Index	40.0	25.0	35.7	36.4	43.8	66.7	22.9 ↑	Expand
New Orders Index	21.4	32.4	30.0	42.9	16.7	30.0	13.3 ↑	Contract
Export Orders Index	31.3	38.5	35.7	40.9	25.0	37.5	12.5 ↑	Contract
Existing Orders Index	17.9	35.3	40.0	46.4	22.2	30.0	7.8 ↑	Contract
Inventory Index of Finished Products	42.9	35.3	30.0	46.4	33.3	40.0	6.7 ↑	Contract
Purchase Quantity Index	38.9	27.3	25.0	40.9	40.0	16.7	-23.3 ↓	Contract
Purchase Price Index	62.5	41.7	50.0	54.5	50.0	50.0	0.0	Stable
Inventory Index of Main Raw Materials	50.0	41.7	41.7	60.0	40.0	50.0	10.0 ↑	Stable
Employees Index	32.1	35.3	35.0	46.4	38.9	40.0	1.1 ↑	Contract
Delivery Time Index	45.8	34.6	37.5	50.0	50.0	50.0	0.0	Stable
Market Expectation Index	42.3	61.5	45.0	50.0	50.0	60.0	10.0 ↑	Expand



### Main Challenges Reported by GTI-Gabon Enterprises

- There was a lack of orders.
- Pressure on cash flow was a problem.
- There was a lack of professional technology.
- The sales of logs were sluggish.



### Main Suggestions from GTI-Gabon Enterprises

- Customers accelerate their payment process.
- The government sets suggested market prices for wood products.
- Lower product sales prices and/or production costs.
- Obtain certifications to maintain competitiveness.



## GTI-ROC Index in May 2025



On 19 May in Brazzaville, environmental officials and experts of the Republic of the Congo (ROC) reviewed the progress of updating the Nationally Determined Contributions (NDCs). During the meeting, participants also explored the methodological framework and roadmap for developing NDC 3.0, drawing on the Global Stocktake (GST) document to guide the update. Recently, the European Space Agency (ESA) launched the Biomass satellite, which, with its radar technology and unprecedented precision, will probe the heart of the densest forests, including those in the Congo Basin. The forests of the Congo Basin are among the richest in biodiversity, but also the least well mapped. The data provided by the Biomass will supplement existing satellite observations, and for the Congo Basin, it could ultimately support certification and traceability initiatives, as well as REDD+ commitments. In other news, information and communication professionals specializing in environmental issues in the Congo Basin met recently, to discuss and propose innovative solutions to address the environmental information and communication gap in the region, and to make communication an effective tool for achieving conservation, development and marketing objectives in the Congo Basin. And according to news from the meeting, the upcoming opening of Congo Basin Radio and Television in Brazzaville, a subsidiary of the Congo Basin Climate Commission, would help to address this gap in communication.

In May 2025, the GTI-ROC index registered 42.7%, an increase of 6.6 percentage points from the previous month, still below the critical value of 50%, indicating that the business prosperity of the superior timber enterprises represented by the GTI-ROC index shrank from the previous month.

As for the twelve sub-indexes, two indexes (employees, and delivery time) were at the critical value of 50%, while the remaining ten indexes (harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, inventory of main raw materials, and market expectation) were all below the critical value. Compared to the previous month, the indexes for production, new orders, existing orders, inventory of finished products, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation increased by 0.8-25.0 percentage point(s), and the indexes for harvesting, export orders, and purchase price declined by 1.2-5.0 percentage points.

**Table: Overview of GTI-ROC Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	41.6	41.9	45.6	40.9	36.1	42.7	6.6 ↑	Contract
Harvesting Index	43.8	45.7	47.2	45.8	44.4	43.2	-1.2 ↓	Contract
Production Index	45.8	45.5	47.2	50.0	44.4	45.2	0.8 ↑	Contract
New Orders Index	46.0	47.9	50.0	44.0	44.4	45.7	1.3 ↑	Contract
Export Orders Index	45.8	50.0	41.7	47.8	50.0	45.5	-4.5 ↓	Contract
Existing Orders Index	46.0	50.0	44.4	46.0	41.7	45.7	4.0 ↑	Contract
Inventory Index of Finished Products	44.0	47.9	47.2	46.0	41.7	47.8	6.1 ↑	Contract
Purchase Quantity Index	33.3	33.3	50.0	25.0	25.0	30.0	5.0 ↑	Contract
Purchase Price Index	50.0	33.3	33.3	25.0	30.0	25.0	-5.0 ↓	Contract
Inventory Index of Main Raw Materials	25.0	33.3	50.0	25.0	16.7	41.7	25.0 ↑	Contract
Employees Index	46.0	45.8	41.7	46.0	44.4	50.0	5.6 ↑	Stable
Delivery Time Index	19.6	47.4	50.0	45.7	46.9	50.0	3.1 ↑	Stable
Market Expectation Index	48.2	48.1	50.0	50.0	44.4	47.8	3.4 ↑	Contract



### Main Challenges Reported by GTI-ROC Enterprises

- Some enterprises faced cash flow problems.
- The logistics for products were slow.
- Rains had restricted production and operations.
- Fuel supply was insufficient for the production.



### Main Suggestions from GTI-ROC Enterprises

- Ensure fuel supply for enterprises.
- Adjust the schedule of field operation according to the weather.
- Improve road conditions to increase logistics speed.



## GTI-Ghana Index in May 2025



Data from the Bank of Ghana showed that from January to April this year, Ghana’s total exports amounted to US\$9.3 billion, a year-on-year increase of 60.5%, and imports stood at US\$5.19 billion, up 2.7%, resulting in a trade surplus of US\$4.1 billion, up from US\$760 million in the same period last year. In May, Ghana’s year-on-year inflation rate fell significantly to 18.4%, which extended the country’s disinflation trend for a fifth consecutive month and marked the lowest inflation rate recorded since February 2022, thus suggesting growing stability in consumer prices in the country. Recently, Ghana’s Minister for Lands and Natural Resources, Emmanuel Armah-Kofi Buah, inaugurated a six-member Forest Plantation Development Fund Board (FPDF), of which the key responsibilities include ensuring transparent and impactful use of resources, mobilizing private investment for plantation development, developing attractive incentives for private sector participation, promoting best practices in sustainable plantation techniques, financing innovative forestry projects, and monitoring compliance with national reforestation objectives.

In May 2025, the GTI-Ghana index registered 66.8%, an increase of 3.2 percentage points from the previous month, was above the critical value (50%) for 5 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Ghana index expanded from the previous month. This month, the timber sector in Ghana continued to see a rise in prosperity, with harvesting, production, and new orders all saw a notable increase in volume when compared to the previous month.

As for the twelve sub-indices, eleven indexes (harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, inventory of main raw materials, employees, and delivery time) were above the critical value of 50%, and only one index (market expectation) was below the critical value. Compared to the previous month, the indexes for harvesting, production, export orders, existing orders, inventory of finished products, purchase quantity, employees, and delivery time increased by 1.5-11.7 percentage points, and the indexes for new orders, purchase price, inventory of main raw materials, and market expectation declined by 0.9-9.2 percentage point(s).



Factory of AYIPA WOOD COMPANY LIMITED in Ghana. Photo: Peter Zormelo

**Table: Overview of GTI-Ghana Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	36.4	68.2	53.3	64.2	63.6	66.8	3.2 ↑	Expand
Harvesting Index	36.8	42.0	34.1	52.1	66.7	75.0	8.3 ↑	Expand
Production Index	20.0	75.0	50.0	81.3	61.8	65.0	3.2 ↑	Expand
New Orders Index	35.0	34.6	15.2	22.9	67.6	65.0	-2.6 ↓	Expand
Export Orders Index	44.4	23.9	2.3	14.6	63.3	67.3	4.0 ↑	Expand
Existing Orders Index	47.5	42.3	63.0	39.6	50.0	61.7	11.7 ↑	Expand
Inventory Index of Finished Products	50.0	57.7	60.9	60.4	58.8	63.3	4.5 ↑	Expand
Purchase Quantity Index	37.5	34.6	28.3	33.3	61.8	63.3	1.5 ↑	Expand
Purchase Price Index	55.3	98.0	76.1	97.9	73.5	70.0	-3.5 ↓	Expand
Inventory Index of Main Raw Materials	50.0	58.0	56.5	52.1	67.6	66.7	-0.9 ↓	Expand
Employees Index	37.5	92.3	56.5	43.8	50.0	55.0	5.0 ↑	Expand
Delivery Time Index	40.0	44.2	34.8	27.1	58.8	63.3	4.5 ↑	Expand
Market Expectation Index	50.0	50.0	50.0	50.0	55.9	46.7	-9.2 ↓	Contract



### Main Challenges Reported by GTI-Ghana Enterprises

- The market demand was low.
- The production costs were high.
- High labour turnover was also a problem.
- The power supply was unstable.
- Poor road network, unnecessary delay at the port and high port charges posed challenges.
- The logging/haulage equipment often broke down.
- There was illegal mining in forest concessions.
- Due to high taxes and duties, the costs of spare parts for vehicles and machines were high.



### Main Suggestions from GTI-Ghana Enterprises

- Invest in road network.
- Implement incentives to drive exports.
- Need government support for new product development and trade promotion.
- Need government subsidy and financial support.
- Tax exemption on imported raw material is also needed.
- Invest in electric power infrastructure and genset equipment.



## GTI-Brazil Index in May 2025



In May, Brazilian exports totaled US\$30.1 billion, while imports amounted to US\$22.9 billion, resulting a trade surplus of US\$7.2 billion. Data from the Brazilian Tree Industry (Ibá) revealed that Brazil's cultivated tree industry achieved a trade surplus of US\$15.7 billion in 2024, up 23.5% compared to 2023, and China remained the top buyer, importing US\$4.8 billion. In response to concerns about the possibility of trade diversion as a result of U.S. tariff policies, the Brazilian government is intensifying its monitoring of risks and opportunities for the Brazilian furniture industry, with the aim of quickly identifying possible atypical import flows, and ensuring all sensitive tariff positions are considered in strategic planning and the survey of defense measures. Recent figures showed that the country's furniture industry is reducing dependence on a few markets and expanding its global reach. From January to March 2025, while the United States continued to lead the export agenda of the Brazilian furniture industry, its South American neighbors (Uruguay, Chile, Peru, Paraguay) and some European markets (the United Kingdom, France) also demonstrated strong growth. In other news, a research report by the Brazilian Chamber of the Construction Industry (CBIC) showed that in the first quarter of 2025, the volume of residential units sold in the country increased by 15.7% year-on-year. And the federal government's

Minha Casa, Minha Vida (MCMV) housing program stood out as the main driver, contributing 47% to the total sales of residential properties.

In May 2025, the GTI-Brazil index registered 32.2%, a decrease of 0.6 percentage point from the previous month, was below the critical value (50%) for 5 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Brazil index shrank from the previous month.

As for the twelve sub-indexes, two indexes (inventory of finished products, and purchase price) were above the critical value of 50%, while the remaining ten indexes were all below the critical value. Compared to the previous month, the indexes for inventory of finished products, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation increased by 2.0-8.9 percentage points, while the indexes for harvesting, production, new orders, export orders, existing orders, and purchase price declined by 0.6-8.1 percentage point(s).

## Table: Overview of GTI-Brazil Sub-Indexes (%)



	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	51.1	34.9	43.2	35.0	32.8	32.2	-0.6 ↓	Contract
Harvesting Index	16.7	31.3	27.8	39.3	45.5	40.0	-5.5 ↓	Contract
Production Index	42.9	30.0	41.7	26.9	33.3	28.6	-4.7 ↓	Contract
New Orders Index	57.1	30.0	38.5	32.1	28.1	20.0	-8.1 ↓	Contract
Export Orders Index	66.7	33.3	45.8	26.9	30.0	28.6	-1.4 ↓	Contract
Existing Orders Index	57.1	50.0	42.3	39.3	40.6	40.0	-0.6 ↓	Contract
Inventory Index of Finished Products	85.7	80.0	61.5	50.0	59.4	66.7	7.3 ↑	Expand
Purchase Quantity Index	28.6	38.9	50.0	36.4	25.0	30.0	5.0 ↑	Contract
Purchase Price Index	50.0	55.6	65.0	54.5	57.1	53.8	-3.3 ↓	Expand
Inventory Index of Main Raw Materials	64.3	44.4	59.1	37.5	32.1	34.6	2.5 ↑	Contract
Employees Index	57.1	45.0	46.2	46.4	34.4	43.3	8.9 ↑	Contract
Delivery Time Index	35.7	33.3	40.9	37.5	39.3	46.2	6.9 ↑	Contract
Market Expectation Index	50.0	21.4	42.9	28.6	31.3	33.3	2.0 ↑	Contract



Outdoor Patio in Belém, Brazil. Photo: Fernanda Tocantins



Planer in Belém, Brazil. Photo: Fernanda Tocantins



## Brief on Brazilian Timber Industry



- In May 2025, negotiations between Brazil and the United States regarding tariffs on Brazilian wood products continued amid concerns, but no new surcharges were implemented. Brazilian exporters emphasized the need to invest in high value-added products, seek new markets, and optimize logistics. The Brazilian Association of Mechanically Processed Timber Industries (Abimci) submitted its defense in the U.S. investigation, focusing on the main export segments. The Brazilian government maintained a dialogue-based approach, awaiting the outcome of the investigation opened by the U.S. in March 2025, with a conclusion deadline of up to 270 days. Meanwhile, the country pursued diversification of its trade agenda and reducing dependence on the U.S. market. Negotiations remain ongoing, with expectations of avoiding or reducing new tariffs beyond the existing 10%.
- Engineered wood has been increasingly recognized as a sustainable and efficient alternative for Brazil's civil construction sector, with production rising by 160% over the last five years. This upward trend is attributed to its renewable nature, reduced environmental footprint, and the ability to cut construction times by up to 40%, supported by advanced technologies like CLT (Cross-Laminated Timber) and MLC (Mass Laminated Timber). Despite this progress, the industry continues to face obstacles, such as a lack of qualified professionals and the absence of public incentive policies. In the interior design market, however, the material is already widely appreciated for its aesthetics, functionality/practicality, and durability.
- During the first quarter of 2025, Brazil's planted forest sector achieved a record trade surplus of USD 3.73 billion, marking a 16.9% increase over the same period in 2024. This result was driven by significant growth in exports of pulp (+24.4%), sawnwood (+20.7%), plywood (+15%), and wood-based panels (+12.8%). Notable performance was recorded in exports to China (+34.7%), Europe (+14.2%), and Asia/Oceania (+30.6%), underscoring the sector's successful market diversification strategy and its increasing contribution to both Brazil's total exports (5.2%) and agribusiness trade balance (10.7%).

*Information provided by GTI-Brazil Focal Point*



Sawn Stock in Belém, Brazil. Photo: Fernanda Tocantins



Storage Warehouse Corridor in Belém, Brazil. Photo: Fernanda Tocantins



### Main Challenges Reported by GTI-Brazil Enterprises

- One of the main problems was the default of domestic market clients.
- Markets were still awaiting the outcome of talks with the U.S.
- Some enterprises were affected by U.S. taxation and anti-dumping tariffs in Europe.
- There were delays in the issuance of LPCO (export licenses, phytosanitary certificates, and sanitary permits) by IBAMA (Brazilian Institute of Environment and Renewable Natural Resources).
- There were delays in the approval of documentation by IBAMA, particularly for Ipê and Cumarú, which are listed under CITES (Appendix II).



### Main Suggestions from GTI-Brazil Enterprises

- Improve management at the ports.
- Take measures to address possible taxation.
- Enhance workforce training.
- Promote the industrialization of the production chain.
- Improve overall process efficiency.
- Measures (e.g., using technology) are needed to speed up the release of documentation by the environmental agency IBAMA.
- Seek other markets that are not dependent on the USA.



# GTI-Mexico Report



## GTI-Mexico Index in May 2025



Under the EUDR framework, Mexico has been classified as a standard-risk country. The Mexican government emphasized that this classification does not pose a threat to the export of Mexican goods, and consultations have already begun with national producers and exporters to offer technical guidance and ensure regulatory compliance. According to news from local media, Mexico’s Ministry of Agriculture and Rural Development (SADER) has already established agreements with key related value chains to commit to 100% deforestation-free production. In addition, a traceability system is being put in place to support these efforts. On 26 May, Mexico’s Inter-Secretarial Commission on Climate Change (CICC) held a regular meeting, reaching a consensus to begin the development of the Special Programme on Climate Change (PECC) 2026-2030 and the update of the Nationally Determined Contributions (NDCs) 3.0. In other news, Mexico’s Secretariat of Agriculture and Rural Development has launched a programme to increase the added value of agricultural exports, ensuring deforestation-free production and responsible use of natural resources, and the goal is to reduce approximately 40% of deforestation linked to production practices over the next five and a half years. Recently, the Mexican government revised the General Law on Sustainable Forest Development, which now includes the Ministry of Science, Humanities, Technology, and Innovation (SECIHTI) among the agencies responsible for forest-related activities, and designates the Mexican Forest Fund as an instrument for advancing forest research and innovation.

In May 2025, the GTI-Mexico index registered 50.2%, a decrease of 1.0 percentage point from the previous month, was above the critical value (50%) for 3 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Mexico index expanded from the previous month. This month, the volume of both harvesting and production continued to grow. In terms of market performance, the export market shifted from contraction to stabilization, while domestic market showed a downward trend after several months of expansion.

As for the twelve sub-indexes, six indexes (harvesting, production, inventory of finished products, purchase price, inventory of main raw materials, and market expectation) were above the critical value of 50%, three indexes (export orders, purchase quantity, and employees) were at the critical value, while the remaining three indexes (new orders, existing orders, and delivery time) were all below the value. Compared to the previous month, the indexes for harvesting, production, export orders, inventory of finished products, inventory of main raw materials, employees, and delivery time increased by 0.9-25.0 percentage point(s), and the indexes for new orders, existing orders, purchase quantity, purchase price, and market expectation declined by 5.4-9.4 percentage points.

## Table: Overview of GTI-Mexico Sub-Indexes (%)



	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	39.9	37.1	37.1	50.3	51.2	50.2	-1.0 ↓	Expand
Harvesting Index	29.2	34.1	34.1	59.1	58.3	64.3	6.0 ↑	Expand
Production Index	35.7	28.9	28.9	55.0	55.3	57.5	2.2 ↑	Expand
New Orders Index	41.7	39.1	39.1	56.5	54.0	45.5	-8.5 ↓	Contract
Export Orders Index	50.0	50.0	50.0	33.3	25.0	50.0	25.0 ↑	Stable
Existing Orders Index	41.7	34.8	34.8	47.8	44.0	38.6	-5.4 ↓	Contract
Inventory Index of Finished Products	31.3	30.4	30.4	41.3	46.0	52.3	6.3 ↑	Expand
Purchase Quantity Index	40.6	34.6	34.6	60.7	59.4	50.0	-9.4 ↓	Stable
Purchase Price Index	58.8	71.4	71.4	64.3	67.6	60.7	-6.9 ↓	Expand
Inventory Index of Main Raw Materials	43.8	35.7	35.7	46.4	55.9	60.7	4.8 ↑	Expand
Employees Index	37.5	37.0	37.0	45.7	48.0	50.0	2.0 ↑	Stable
Delivery Time Index	43.8	47.5	47.5	39.1	40.0	40.9	0.9 ↑	Contract
Market Expectation Index	89.6	82.6	82.6	82.6	81.0	75.0	-6.0 ↓	Expand



Commercial Plantation Forestry, Mexico. Photo: Santa Geneveva



Open air drying of wood, Mexico. Photo: Industria Forestal Pueblos Mancomunados



## Brief on Mexican Timber Industry



### Introduction

The present document shows Timber Market information in Mexico for the month of April. The timber prices presented in the following document are obtained through the National Forest Commission's "Forest Product Pricing System" (abbreviated SIPRE in Spanish).

This Pricing System is a tool by which, local forest producers register referential prices for forest products (timber and non-timber) in tropical and temperate forests through a digital survey. Forest product prices are reported as pondered means. These are pondered based on the national timber production and the prices are published at a regional and national level.

### Timber prices (\$ USD) for Teak (*Tectona grandis* L.)

In Mexico, Teak plantations are concentrated in the states of Campeche, Tabasco, Chiapas and Veracruz. Teak timber prices reported by local forest producers for roundwood and sawn wood products have fluctuated considerably during the past year. Timber prices for long dimensional roundwood have varied from 151.42 USD/m<sup>3</sup> to 169.13 USD/m<sup>3</sup>. Additionally, sawn wood Teak timber prices have declined during the past year.

Teak roundwood (Table 1) and sawn-wood prices (Table 2) are reported at the dollar exchange rate of 20.69 Mexican pesos, published on April 7th, 2025 by the Bank of Mexico.

**Table 1. Teak round wood prices (\$USD/m<sup>3</sup>) based on their quality (primary and secondary).**

Long dimensional roundwood (primary)		Long dimensional roundwood (secondary)	
Sold on the forest path	Sold on the forest path	Sold at the sawmill	
169.13	48.32	106.31	

**Table 2. Teak sawn wood prices (\$USD/board foot).**

Long dimensional sawn wood (mill run)	Short dimensional sawn wood
1.46	0.84

*Information provided by GTI-Mexico Focal Point*



### Main Challenges Reported by GTI-Mexico Enterprises

- There was a decline in product sales.
- The quality of the raw materials was unstable.
- There were barriers to international trade or tariff issues.
- Enterprises faced price pressure from competitors.
- Market demand was unstable and it was difficult to predict.
- Sales channels were limited, or channel development was insufficient.
- Some consumers had a lower recognition of wood products.



### Main Suggestions from GTI-Mexico Enterprises

- Conduct capacity building to improve wood processing processes.
- Make changes to legislation to reduce imports of products.
- Get support for the acquisition of equipment, machinery and infrastructure.
- Obtain government subsidies to reduce production costs.
- Enhance marketing and increase the added value of national products.
- Make improvements in logistics process planning within the industry.
- Fully expand the sales and distribution channels of products.



Storage Yard, Mexico. Photo: Santa Genoveva



Wooden piles, Mexico. Photo: Industria Forestal Pueblos Mancomunados



## GTI-China Index in May 2025



Recently, China's National Forestry and Grassland Administration and the National Development and Reform Commission jointly issued the "National Reserve Forest Development Implementation Plan (2025–2028)." The plan focuses on 14 provinces, autonomous regions, and municipalities, including Fujian and Guangxi, to promote the afforestation of national reserve forests and the development of related industries and supporting infrastructure, as well as to enhance the capacity for cultivating, storing, and producing high-quality timber. From January to April, China's cumulative wood imports amounted to 13.91 million cubic meters, a decrease of 11% compared to the same period in 2024, and the import value reached US\$3.9 billion, down 14% year-on-year. Specifically, the import volume of logs declined by 12% to 11 million cubic meters, with the average price falling by 4% year-on-year, and the import volume of sawnwood also decreased by 12% to 8.25 million cubic meters, with prices remaining essentially flat compared to the same period last year. During the same period, China's cumulative export value of furniture and its parts amounted to 155.88 billion yuan, down 6.8% year-on-year, and the top three export destinations were the United States (-9.47% year-on-year), the United Kingdom (+5.69%), and Japan (-4.14%). Recently, the Wooden Doors & Windows Committee under China Timber & Wood Products Distribution Association released China's Wooden Door Industry Report 2024, which indicated that Malaysia had ranked among the top ten export

destinations for China's wooden door products for the first time in the past three years.

In May 2025, the GTI-China index registered 58.5%, an increase of 4.4 percentage points from the previous month, was above the critical value (50%) for 3 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-China index expanded from the previous month. This month, China's timber market was still in the traditional peak season, and its timber sector was generally on an upward trend.

As for the sub-indexes, all the twelve indexes were above the critical value of 50%. Compared to the previous month, the indexes for production, new orders, export orders, existing orders, purchase quantity, purchase price, import, inventory of main raw materials, employees, delivery time, and market expectation increased by 1.2-8.5 percentage points, while the index for inventory of finished products declined by 4.4 percentage points.

**Table: Overview of GTI-China Sub-Indexes (%)**

	2024.12	2025.01	2025.02	2025.03	2025.04	2025.05	MoM	Performance
Comprehensive Index	49.8	39.5	44.1	58.1	54.1	58.5	4.4 ↑	Expand
Production Index	50.0	37.9	41.4	62.1	59.1	63.4	4.3 ↑	Expand
New Orders Index	47.1	35.7	40.5	61.3	53.6	57.0	3.4 ↑	Expand
Export Orders Index	52.3	42.9	44.0	50.8	53.2	56.7	3.5 ↑	Expand
Existing Orders Index	45.3	37.4	41.4	54.3	52.3	53.5	1.2 ↑	Expand
Inventory Index of Finished Products	56.4	41.2	49.1	52.7	55.5	51.1	-4.4 ↓	Expand
Purchase Quantity Index	48.8	37.9	43.1	62.1	53.2	59.5	6.3 ↑	Expand
Purchase Price Index	45.9	50.5	50.0	55.5	52.3	54.6	2.3 ↑	Expand
Import Index	47.7	45.6	50.0	55.2	47.5	56.0	8.5 ↑	Expand
Inventory Index of Main Raw Materials	51.7	46.7	48.3	55.9	45.9	52.8	6.9 ↑	Expand
Employees Index	47.7	35.2	44.0	51.2	50.5	57.0	6.5 ↑	Expand
Delivery Time Index	56.4	50.5	53.4	55.5	56.8	59.2	2.4 ↑	Expand
Market Expectation Index	42.4	55.5	67.2	67.4	56.4	61.3	4.9 ↑	Expand



### Main Challenges Reported by GTI-China Enterprises

- The production costs were high.
- The market competition was fierce.
- The supply of raw materials was unstable.
- The recovery of funds was slow and enterprises faced great financial pressure.



### Main Suggestions from GTI-China Enterprises

- Adjust international trade policies.
- Broaden financing channels.
- Expand international markets to increase orders.
- Adjust production according to market demand, so as to avoid overcapacity.

# About This Report

## Survey Methodology

With the support of the International Tropical Timber Organization (ITTO), the Global Timber Index (GTI) platform has set up focal points in pilot countries of both timber producing and timber consuming countries. At present, focal points have been established in 9 countries, including Indonesia, Malaysia, Thailand, Gabon, Republic of the Congo, Ghana, Brazil, Mexico and China.

At the end of each month, focal points of the pilot countries organize the leading enterprises to fill out the GTI questionnaire, and then the Global Green Supply Chains Initiative (GGSCI) Secretariat organizes experts to summarize and analyze the data, and write the report.

Based on the characteristics of the timber and timber products industry in different countries, the current GTI questionnaire is divided into three categories: timber producing countries, timber manufacturing countries and timber consuming countries. For the timber producing countries, the questionnaire focuses on the developments of local timber harvesting and supplying, covering log, sawnwood, and veneer, etc. For timber manufacturing countries (like China), the questionnaire focuses on the developments of local timber processing and manufacturing, covering floor, door, plywood, and furniture, etc. For timber consuming countries, the questionnaire focuses on the developments of the timber products facing the end market.

## Data and Interpretation

GTI index contains diffusion index and comprehensive index.

(1) The calculation of GTI diffusion index. GTI has 12 diffusion indexes (or called sub-indices) based on the data from 12 objective questions which covers production (or harvesting), new orders, new export orders, existing orders, inventory of products, purchasing quantity, import, purchasing prices of main raw materials, inventory of raw material, employees, delivery time, and market expectation. The diffusion index is calculated by adding the percentage of enterprises with positive answers to half of the percentage with unchanged answers.

(2) The calculation of GTI comprehensive index. GTI comprehensive index (GTI index for short) is calculated based on the diffusion indexes of five of the indexes with different weights: production (harvesting), new orders, inventory of raw material, employees, delivery time. The five diffusion indexes and their weights are determined according to their leading influence on the industrial economy.

The value of the index is between 0-100%, and 50% is the critical value of the index. A GTI index reading above 50 percent indicates that the industry prosperity is generally expanding; below 50 percent indicates that it is generally declining.

### Declaration

GTI report is compiled based on the data provided by the timber enterprises in the pilot countries. The data can not be used in investment decision-making, but can help to understand the timber industry trend.

The rights to interpret data and the intellectual property contained in the reports are owned by ITTO and GGSCI Secretariat jointly. ITTO and GGSCI Secretariat hereby grant you a limited, revocable, nonsublicensable license to access and display on your individual device the GTI report (excluding any software code) solely for your personal, non-commercial use. Without the permission from ITTO and GGSCI Secretariat, you shall not copy, download, stream, capture, reproduce, duplicate, archive, upload, modify, translate, publish, broadcast, transmit, retransmit, distribute, perform, display, sell, or otherwise use any GTI report Content.



**ITTO**  
INTERNATIONAL TROPICAL  
TIMBER ORGANIZATION

## About ITTO

The International Tropical Timber Organization, ITTO for short, is an intergovernmental organization promoting the sustainable management and conservation of tropical forests and the expansion and diversification of international trade in tropical timber from sustainably managed and legally harvested forests. It located in Yokohama, Japan. At present, there are 76 ITTO members countries. ITTO's membership represents about 90% of the global tropical timber trade and more than 80% of the world's tropical forests.



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GLOBAL GREEN SUPPLY CHAINS INITIATIVE

## About GGSC

Global Green Supply Chains Initiative (GGSC) is part of the Legal and Sustainable Supply Chains (LSSC) Programme, which was approved at the 53rd session of the International Tropical Timber Council for being included into the Biennial Work Programme (BWP) of International Tropical Timber Organization (ITTO). Launched in 2018 by leading Chinese enterprises in forest products industry, GGSC became an international initiative in 2019. Since then, GGSC has been acting as a global platform for serving the sustainable development of the forest products industry.

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# GTI REPORT

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