



ITTO
INTERNATIONAL TROPICAL
TIMBER ORGANIZATION



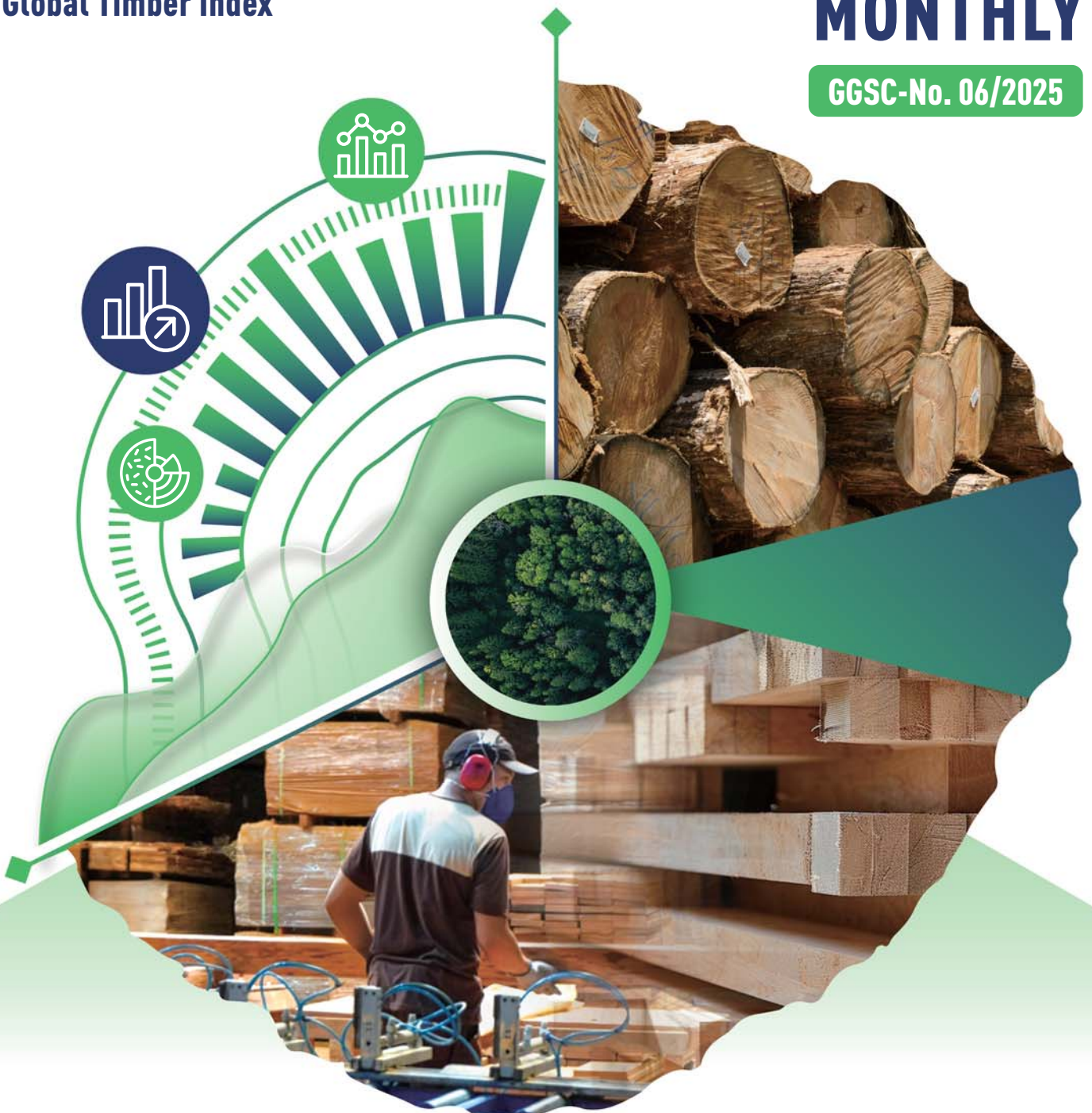
This report was prepared by GGSC, with support of ITTO and IPIM, and Focal Points of Indonesia, Malaysia, Thailand, Gabon, Republic of Congo, Ghana, Brazil, Mexico and China.

GTI REPORT 2025

Global Timber Index

MONTHLY

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Indonesia

- Sustainable Forest Management of the Ministry of Environment and Forestry



Malaysia

- Malaysian Timber Council (MTC)
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Gabon

- Ministry of Water and Forests, Responsible for the Climate Plan and Land Use

Republic of the Congo

- Ministry of Forest Economy

Ghana

- Forestry Commission



Mexico

- National Forestry Commission of Mexico (CONAFOR)

Brazil

- STCP Engenharia de Projetos Ltda

Thailand

- Thai Timber Association (TTA)

China

- The Secretariat of the Global Green Supply Chains Initiative (GGSC)



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GTI REPORT 2025

JUNE





Global Legal & Sustainable Timber Forum 2025

From Forest to Home

— An International Dialogue on Emerging Consumer Trends and Supply Chains Innovation

23-24 September 2025

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Organizer



Diamond Partner



San Francisco Campeche, Campeche, Mexico

A Case on Mechanization of Harvesting Activities



Agropecuaria Santa Genoveva, S.A.P.I. de C.V., a company located in Campeche, Mexico, has successfully optimized its processes and enhanced technical capabilities through the mechanization of its harvesting activities, thus reducing workplace accidents.

1. Introduction to the Practice

Timber harvesting in commercial forest plantations represents a critical stage in the production cycle, involving high costs, labor risks, and environmental pressure. In Mexico, a culture of developing and utilizing PFCs (Commercial Forest Plantations) is emerging. Harvesting activities are carried out manually, resulting in low productivity, potential workplace accidents, and significant damage to the soil and ecosystem.

In response to these challenges, the progressive mechanization of harvesting activities, starting with equipment for felling, skidding, loading, and unloading, emerges as a viable solution to improve efficiency, reduce physical effort, and professionalize forestry practices for small and medium producers.

2. Implementation of the Practice

Objective: to introduce the use of specialized machinery and equipment, such as harvesters for felling, skidders for log transportation and other operations, and pneumatic cranes for sorting, loading, and unloading, and to use specialized labor for dimensioning (length) products intended for sale, classifying them by diameter category, etc.

Steps of the Process:

1) Diagnosis of the Company's Plantation, Harvesting Volume, and Labor Requirements

- Make a plan on the sequence of plots for harvesting according to the harvesting schedule throughout the year.
- Evaluate available resources to carry out the harvesting.

2) Operator Training

- Theoretical and practical workshops on safe felling and equipment use
- Workshops on the skidding of logs for subsequent activities
- Training on the use of pneumatic cranes for loading, unloading, etc.
- Training on preventive and corrective maintenance, as well as fault diagnosis and detection

3) Evaluation and Monitoring

- Time tracking and quality & safety evaluation

3. Results and Benefits

- Reduction in harvesting time. Fewer accidents
- Reduced environmental impact through the proper use of machinery with high-flotation tires that reduce impact on the soil
- Labor savings and reduced physical strain
- Increased transport volume per workday

4. Lessons Learned

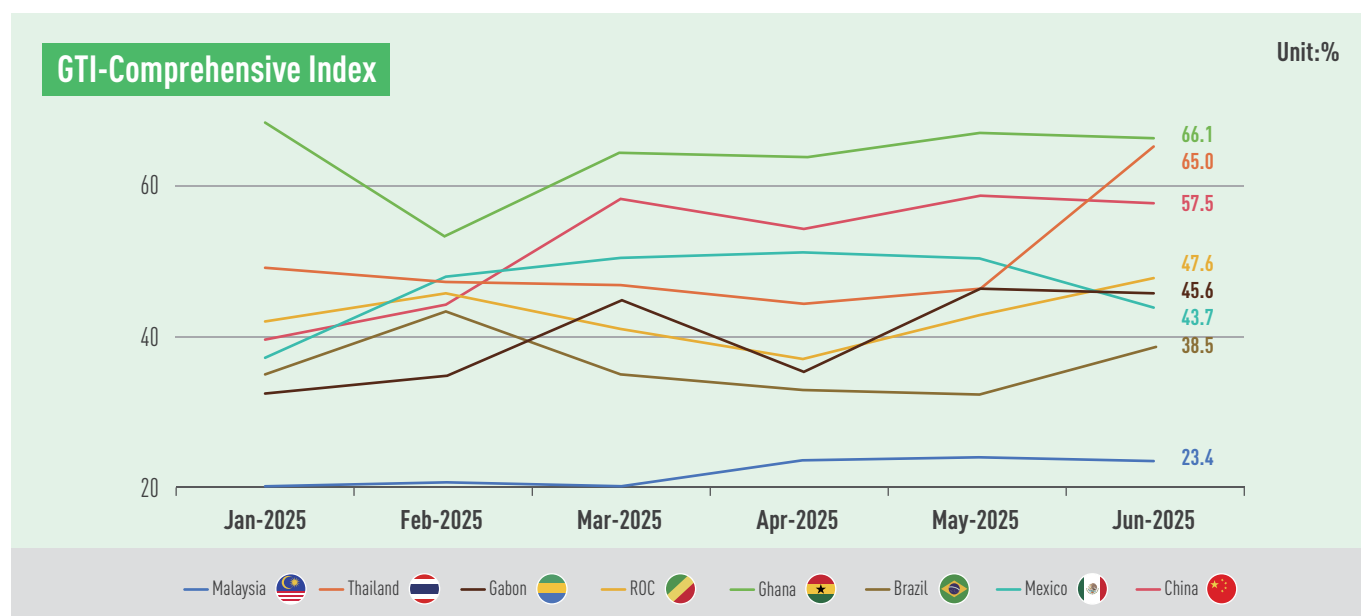
Planned use of equipment reduces personnel accident risks during harvesting activities. Safety significantly improves with technical training.

The best practice above has been provided by Agropecuaria Santa Genoveva, S.A.P.I. de C.V. in Campeche, Mexico. We also appreciate the support from National Forestry Commission of Mexico (GTI focal point in Mexico), for their contribution to the GTI Platform. For further information on this best practice, please contact Victor Hugo Fernandez Carrillo at victor.fernandez@genoveva.com.mx.



Overview of the GTI Index

GTI: Thailand's timber market returns to expansion territory



The Global Timber Index (GTI) Report for June 2025 revealed a slight upward trend in the overall performance of the global timber market this month. The GTI readings for Ghana (66.1%), Thailand (65.0%), and China (57.5%) exceeded the 50% critical value, indicating overall improvements in their timber sectors. Among the winners, Ghana remained in the positive territory for the sixth consecutive month, China stayed in the territory for the fourth month, while Thailand returned to growth after five months of contraction. The GTIs for the Republic of the Congo (47.6%), Gabon (45.6%), Mexico (43.7%), Brazil (38.5%), and Malaysia (23.4%) remained in contraction territory. However, both Brazil and the Congo saw an easing of the downward trends.

Positive signs were also evident in the sub-indices of some countries. For example, harvesting volume rose in both Gabon and the Congo; production volume in Thailand increased significantly; on the demand side, Mexico's domestic market improved, while China and Ghana continued to see growth in their export markets.

This month, GTI sample enterprises highlighted challenges in market demand, costs & prices, trade barriers, etc. For instance, Chinese businesses reported intense price competition and suggested regulating practices in the industry; Ghanaian enterprises expressed concerns over rising electricity costs, while the Gabonese counterparts noted

that SETRAG, the railway operator, raised the transportation price for logs; and in Latin America, firms in both Brazil and Mexico highlighted issues related to international trade barriers or tariffs.

In the field of sustainable forest management, on 3 June, Brazilian President Lula announced the allocation of R\$825.7 million from the Amazon Fund (Fundo Amazônia) to the Brazilian Institute for the Environment and Renewable Natural Resources (IBAMA), aiming to reinforce environmental monitoring to combat deforestation in the Amazon region. GTI pilot countries are also exploring technological solutions to support sustainable forest management. For example, in Malaysia, the Enforcement Agency Integrity Commission, the Forestry Department of Peninsular Malaysia, and the Malaysian Space Agency have been committed to expanding the use of satellite and remote sensing technology for forest monitoring, and through the Forest Monitoring Remote Sensing Systems (FMRS Plus), the Forestry Department detected approximately 250 cases of encroachment last year and arrested the offenders. In Ghana, the Minister of Environment, Science, Technology and Innovation revealed that the government plans to use Artificial Intelligence (AI) to monitor and manage Ghana's forest areas in real time to help stop illegal mining activities.

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.

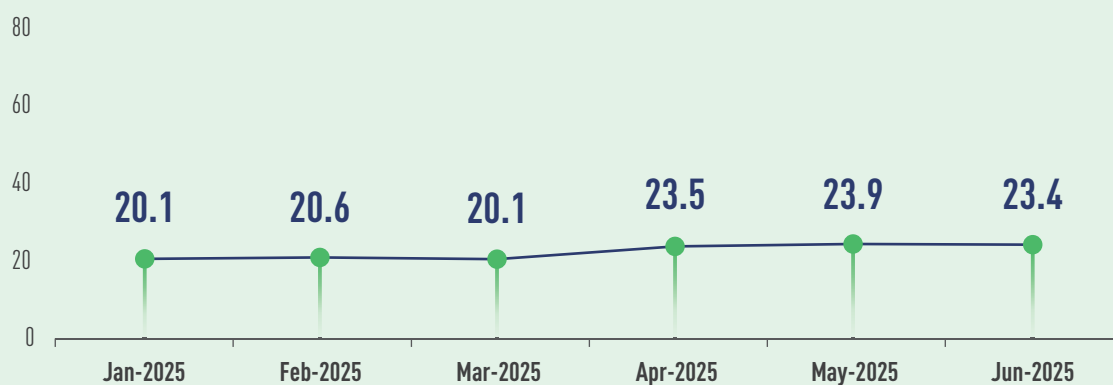


GTI-Malaysia Index in June 2025



GTI-Malaysia Comprehensive Index

Unit: %



In May 2025, Malaysia registered an inflation rate of 1.2%, the lowest in 51 months. In the first quarter of this year, Sarawak's timber industry achieved an export value of RM625 million, with plywood contributing RM317 million (+4% YoY). In the field of sustainable forest management, more than 83% of the Permanent Forest Reserves (PRF) in Malaysia had been certified under the Programme for the Endorsement of Forest Certification or PEFC scheme to date, making Malaysia among the countries with the largest area of certified tropical rainforest in the world. The Enforcement Agency Integrity Commission, the Forestry Department of Peninsular Malaysia, and the Malaysian Space Agency had been committed to expanding the use of satellite and remote sensing technology for forest monitoring, and through the Forest Monitoring Remote Sensing Systems (FMRS Plus), the Forestry Department detected approximately 250 cases of encroachment last year and arrested the offenders. In addition, the Malaysian government had introduced the Forest Plantation Development Programme (PPLH), to reduce reliance on natural forests. The programme involves the cultivation of eight high-value tree species, including akasia, khaya, jati, and kelempayan, along with fast-growing species such as eucalyptus and bamboo.

In June 2025, the GTI-Malaysia index registered 23.4%, a decrease of 0.5 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, 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 harvesting, production, new orders, purchase quantity, purchase price, and market expectation increased by 0.6-21.5 percentage point(s); the indexes for inventory of finished products, and inventory of main raw materials were unchanged from the previous month; and the indexes for export orders, existing orders, employees, and delivery time declined by 2.8-10.9 percentage points.



Sealable Veneer Product in Tan Chee Seng Sawmill Perak, Malaysia. Photo: Khairul nizam

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	20.1	20.6	20.1	23.5	23.9	23.4	-0.5 ↓	Contract
Harvesting Index	7.1	14.3	14.3	21.4	21.4	42.9	21.5 ↑	Contract
Production Index	12.5	18.8	18.8	18.8	22.2	25.0	2.8 ↑	Contract
New Orders Index	30.0	25.0	25.0	30.0	18.2	20.0	1.8 ↑	Contract
Export Orders Index	20.0	25.0	25.0	35.0	25.0	22.2	-2.8 ↓	Contract
Existing Orders Index	30.0	35.0	35.0	35.0	40.9	30.0	-10.9 ↓	Contract
Inventory Index of Finished Products	50.0	50.0	50.0	45.0	50.0	50.0	0.0	Stable
Purchase Quantity Index	27.8	22.2	22.2	33.3	25.0	27.8	2.8 ↑	Contract
Purchase Price Index	61.1	44.4	38.9	38.9	55.0	55.6	0.6 ↑	Expand
Inventory Index of Main Raw Materials	16.7	11.1	5.6	6.3	27.8	27.8	0.0	Contract
Employees Index	15.0	20.0	20.0	25.0	31.8	25.0	-6.8 ↓	Contract
Delivery Time Index	22.2	22.2	22.2	27.8	25.0	22.2	-2.8 ↓	Contract
Market Expectation Index	5.0	10.0	15.0	15.0	22.7	40.0	17.3 ↑	Contract



Main Challenges Reported by GTI-Malaysia Enterprises

- Labour costs increased.
- The exchange rate was unstable.
- Global building markets remained weak.
- Demand of tropical wood decreased.
- A lot of importation of plywood into Sarawak market posed a challenge.
- There was a shortage of plywood demand for export, and at the same time, there was a lack of logs.
- Orders decreased, and costs for freight to USA increased.



Main Suggestions from GTI-Malaysia Enterprises

- Slow down production.
- Conduct more effective marketing.
- Suggest that the government stimulate more usage of sawnwood in the construction industry.
- Promote the use of tropical wood through design and innovation.

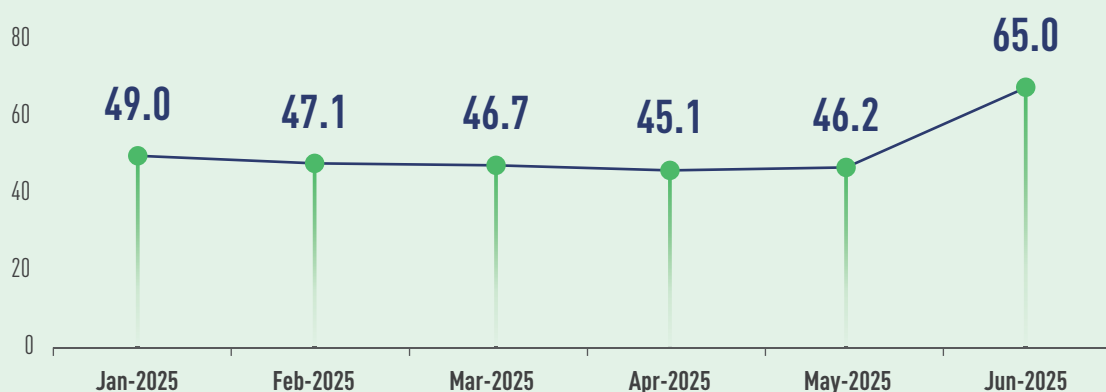


GTI-Thailand Index in June 2025



GTI-Thailand Comprehensive Index

Unit: %



Recently, Thailand's Cabinet approved a comprehensive economic stimulus package worth 157 billion baht, of which 45.864 billion baht was allocated to transportation infrastructure across 26 projects, targeting road connections between secondary cities as well as agricultural area networks. Data released by Thai Trade Policy and Strategy Office of the Ministry of Commerce showed Thailand's total exports rose 18.4 % year-on-year in May 2025, yet exports of wood and wood products fell 9.5%. Due to higher production costs and increased demand for interior decoration, the prices of flooring, door frames and window frames increased in May. However, industry insiders expect the markets of construction and decoration materials to cool in the third quarter, when the rainy season is traditionally a lull period for the markets. In other news, to prevent encroachment and illegal logging in forest reserves along the border, the Thai government recently announced plans to build additional patrol routes and develop communication and electricity systems for forest rangers, thus enabling them to communicate effectively.

In June 2025, the GTI-Thailand index registered 65.0%, an increase of 18.8 percentage points from the previous month, marking its return above the 50% critical value after five months, and indicating that the business prosperity of the superior timber enterprises represented by the GTI-Thailand index expanded from the previous month. Behind the recovery, data showed harvesting, production, and domestic and international orders all saw significant growth compared to the previous month.

As for the twelve sub-indexes, nine indexes (harvesting, production, new orders, export orders, existing orders, purchase quantity, employees, delivery time, and market expectation) were

above the critical value of 50%, one index (purchase price) was at the critical value, while the remaining two indexes (inventory of finished products, and inventory of main raw materials) were below the critical value. Compared to the previous month, the indexes for harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation increased by 11.7-29.4 percentage points, and the index for purchase price declined by 3.1 percentage points.



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

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	49.0	47.1	46.7	45.1	46.2	65.0	18.8 ↑	Expand
Harvesting Index	39.3	50.0	50.0	45.5	33.3	80.8	47.5 ↑	Expand
Production Index	52.6	53.6	50.0	37.5	50.0	71.9	21.9 ↑	Expand
New Orders Index	55.3	50.0	52.9	47.1	52.9	79.4	26.5 ↑	Expand
Export Orders Index	71.4	37.5	50.0	41.7	50.0	78.6	28.6 ↑	Expand
Existing Orders Index	40.0	46.7	47.1	41.2	38.2	67.6	29.4 ↑	Expand
Inventory Index of Finished Products	50.0	30.0	38.2	38.2	35.3	47.1	11.8 ↑	Contract
Purchase Quantity Index	50.0	46.2	46.7	46.7	37.5	63.3	25.8 ↑	Expand
Purchase Price Index	63.2	67.9	46.9	46.7	53.1	50.0	-3.1 ↓	Stable
Inventory Index of Main Raw Materials	44.7	17.9	34.4	40.6	34.4	46.9	12.5 ↑	Contract
Employees Index	40.0	50.0	41.2	50.0	41.2	52.9	11.7 ↑	Expand
Delivery Time Index	45.0	46.4	44.1	50.0	41.2	53.1	11.9 ↑	Expand
Market Expectation Index	42.5	50.0	38.5	50.0	41.2	58.8	17.6 ↑	Expand



Main Challenges Reported by GTI-Thailand Enterprises

- The volume of regular orders declined.
- There was a shortage of sawmill labor.
- Consumers' purchasing power shrank.
- Raw material prices unexpectedly rose.
- There were some marketing problems and product sales dropped.
- There was a lack of employees, and employee capabilities were also insufficient.
- Due to the poor economy, some customers were facing financial difficulties and a lack of liquidity in their business operations.
- Customers used prices from competitors' countries as a criterion when deciding to purchase products.



Main Suggestions from GTI-Thailand Enterprises

- Reduce production costs.
- Expand retail channels of products.
- Pay more attention to developments in the market.
- Provide specialized training for Thai workers.
- Companies tighten credit controls, offer adjusted payment plans for selected clients, intensify follow-ups on overdue accounts and reassess credit terms.

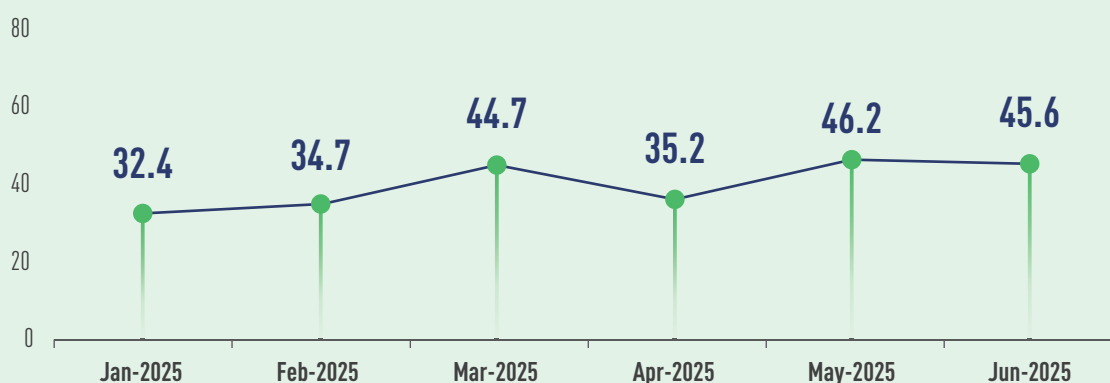


GTI-Gabon Index in June 2025



GTI-Gabon Comprehensive Index

Unit: %



According to Gabonese media reports on 16 June, the World Bank approved a US\$150 million financing package to support Gabon's infrastructure development and management project, which is a part of Gabon's National Development Plan for 2024–2026, aiming to achieve sustainable transformation of second-tier cities through targeted investments in urban infrastructure. Recently, the Gabonese government announced that starting from 1 January 2026, all companies with an annual turnover of more than 2 billion CFA francs will be required to construct or purchase a building in Gabon to serve as their headquarters, in an effort to boost the real estate sector. On 10 June, the United Nations Development Programme (UNDP) held a press luncheon in Libreville, the capital of Gabon, to present its key projects for supporting the Gabonese government in achieving the Sustainable Development Goals by 2030. In the environmental field, UNDP supports Gabon through initiatives such as the Central African Forest Initiative (CAFI) and the Biodiversity Finance Initiative (BIOFIN). To promote the sustainable transformation of Gabon's timber sector, a consultation meeting between the Gabonese government and the private sector was held on 19 June, in Libreville, establishing a permanent national platform for communication and exchanges between the public and private sectors.

In June 2025, the GTI-Gabon index registered 45.6%, a decrease of 0.6 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-Gabon index shrank from the previous month. Although the total volume of orders declined this month, the harvesting volume increased slightly, and the production volume held steady compared to the previous month.

As for the twelve sub-indexes, two indexes (harvesting, and inventory of finished products) were above the critical value of 50%, three indexes (production, employees, and delivery time) were at the critical value, while the remaining seven indexes (new orders, export orders, existing orders, 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 harvesting, new orders, export orders, existing orders, inventory of finished products, purchase quantity, and employees increased by 5.4–26.2 percentage points; the index for delivery time was unchanged from the previous month; and the indexes for production, purchase price, inventory of main raw materials, and market expectation declined by 7.1–16.7 percentage points.

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	32.4	34.7	44.7	35.2	46.2	45.6	-0.6 ↓	Contract
Harvesting Index	36.7	25.0	46.4	44.4	40.0	55.0	15.0 ↑	Expand
Production Index	25.0	35.7	36.4	43.8	66.7	50.0	-16.7 ↓	Stable
New Orders Index	32.4	30.0	42.9	16.7	30.0	40.0	10.0 ↑	Contract
Export Orders Index	38.5	35.7	40.9	25.0	37.5	42.9	5.4 ↑	Contract
Existing Orders Index	35.3	40.0	46.4	22.2	30.0	40.0	10.0 ↑	Contract
Inventory Index of Finished Products	35.3	30.0	46.4	33.3	40.0	55.0	15.0 ↑	Expand
Purchase Quantity Index	27.3	25.0	40.9	40.0	16.7	42.9	26.2 ↑	Contract
Purchase Price Index	41.7	50.0	54.5	50.0	50.0	42.9	-7.1 ↓	Contract
Inventory Index of Main Raw Materials	41.7	41.7	60.0	40.0	50.0	35.7	-14.3 ↓	Contract
Employees Index	35.3	35.0	46.4	38.9	40.0	50.0	10.0 ↑	Stable
Delivery Time Index	34.6	37.5	50.0	50.0	50.0	50.0	0.0	Stable
Market Expectation Index	61.5	45.0	50.0	50.0	60.0	45.0	-15.0 ↓	Contract



Main Challenges Reported by GTI-Gabon Enterprises

- There was a lack of orders.
- Export orders decreased.
- There were challenges in market access.
- Customers delayed payments.
- SETRAG, the country's railway network operator, increased the railway transportation price for logs.
- Fuel prices were high, and there were many taxes and surcharges.
- The market was saturated, making it difficult to sell.
- The process of obtaining CITES import permits from Europe was slow.



Main Suggestions from GTI-Gabon Enterprises

- Wait for the market to recover.
- Suggest that the government regulate fuel prices.
- Accelerate the transaction process between suppliers and buyers.
- Companies obtain certifications to maintain market competitiveness.
- Communicate with CITES management authorities in Europe to speed up the relevant processes.

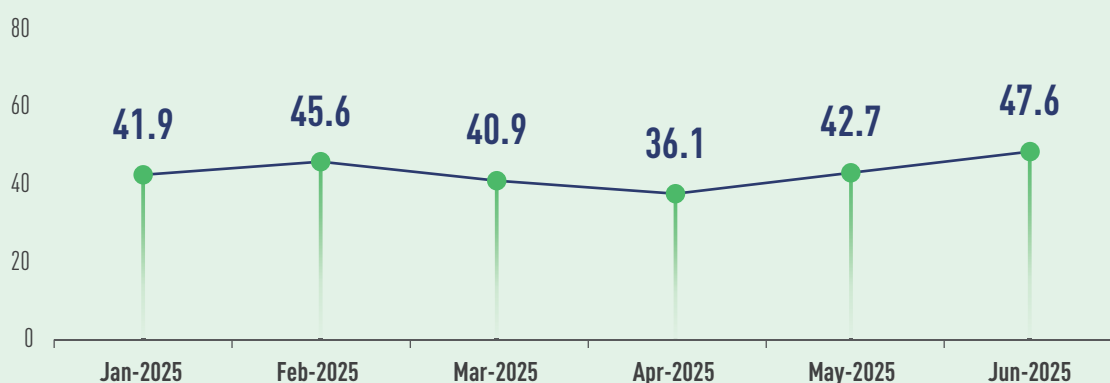


GTI-ROC Index in June 2025



GTI-ROC Comprehensive Index

Unit: %



On 3 June, Mediterranean Shipping Company (MSC) reaffirmed its commitment to the development of the Port of Pointe-Noire, as it said that MSC had invested more than 150 billion CFA francs through its subsidiary Africa Global Logistics (AGL) to expand the Pointe-Noire container terminal and would also build a quay wall capable of accommodating large-capacity vessels. On 14 June, the Embassy of the Republic of the Congo in China and China Business Update co-hosted Congo Economic and Trade Investment Cooperation Intention Matching Meeting, in Changsha, China. During the meeting, Rosalie Matondo, the Minister of Forest Economy of the Republic of the Congo (ROC), stated that ROC has approximately 10 million hectares of sustainable forests for harvesting, and the annual harvesting quota was only 1.6 million cubic meters. On 27 June in Brazzaville, the Minister of International Cooperation and Promotion of Public/Private Partnership of ROC, Denis Christel Sassou Nguesso, officially launched its Country Package for Forests, Nature and Climate. Adopted during the 28th Conference of the Parties to the UN Framework Convention on Climate Change (COP28), the initiative will benefit from the financial and technical support of France, which is contributing 20 million euros, the European Union and other international partners.

In June 2025, the GTI-ROC index registered 47.6%, an increase of 4.9 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. This month, the Congo saw a continuous decline in both production and orders, while the harvesting volume slightly increased from the previous month.

As for the twelve sub-indexes, two indexes (harvesting, and employees) were above the critical value of 50%, two other indexes (existing orders, and inventory of finished products) were at the critical value, while the remaining eight indexes (production, new orders, export orders, purchase quantity, purchase price, inventory of main raw materials, delivery time, and market expectation) were all below the value. Compared to the previous month, the indexes for harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, employees, and market expectation increased by 0.3-10.7 percentage point(s); the index for inventory of main raw materials was unchanged from the previous month; and the index for delivery time declined by 2.1 percentage points.

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	41.9	45.6	40.9	36.1	42.7	47.6	4.9 ↑	Contract
Harvesting Index	45.7	47.2	45.8	44.4	43.2	51.9	8.7 ↑	Expand
Production Index	45.5	47.2	50.0	44.4	45.2	48.1	2.9 ↑	Contract
New Orders Index	47.9	50.0	44.0	44.4	45.7	46.2	0.5 ↑	Contract
Export Orders Index	50.0	41.7	47.8	50.0	45.5	48.1	2.6 ↑	Contract
Existing Orders Index	50.0	44.4	46.0	41.7	45.7	50.0	4.3 ↑	Stable
Inventory Index of Finished Products	47.9	47.2	46.0	41.7	47.8	50.0	2.2 ↑	Stable
Purchase Quantity Index	33.3	50.0	25.0	25.0	30.0	40.0	10.0 ↑	Contract
Purchase Price Index	33.3	33.3	25.0	30.0	25.0	35.7	10.7 ↑	Contract
Inventory Index of Main Raw Materials	33.3	50.0	25.0	16.7	41.7	41.7	0.0	Contract
Employees Index	45.8	41.7	46.0	44.4	50.0	51.9	1.9 ↑	Expand
Delivery Time Index	47.4	50.0	45.7	46.9	50.0	47.9	-2.1 ↓	Contract
Market Expectation Index	48.1	50.0	50.0	44.4	47.8	48.1	0.3 ↑	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.

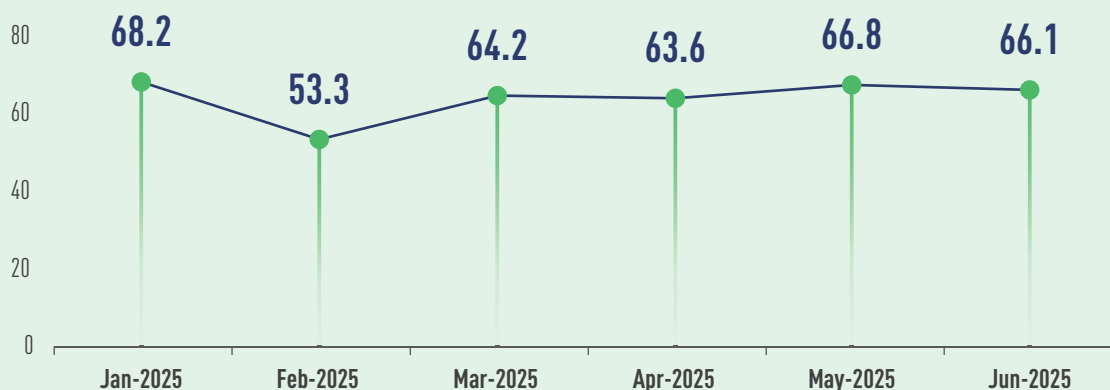


GTI-Ghana Index in June 2025



GTI-Ghana Comprehensive Index

Unit: %



Recently, Ghana's Public Utilities Regulatory Commission announced a 2.45% increase in electricity tariff, effective 1 July, after reviewing macro-economic indicators such as inflation, exchange rate fluctuations and rising fuel costs. On the World Environment Day, Ghana's President John Mahama launched the 2025 national tree planting exercise, aiming to plant 30 million trees across the country as part of efforts to restore the country's forest cover and combat climate change. In addition, the Ghanaian government had planned to ban the use of wood for mono-desks in schools as a measure to reduce the felling of trees. To curb environmental damage (especially to forest reserves) caused by illegal mining, the government of Ghana recently imposed an immediate ban on the importation of excavators into the country without prior approval. In other news, the Minister of Environment, Science, Technology and Innovation revealed that the government had planned to use Artificial Intelligence (AI) to monitor and manage Ghana's forest areas in real time to help stop illegal mining activities.

In June 2025, the GTI-Ghana index registered 66.1%, a decrease of 0.7 percentage point from the previous month, was above the critical value (50%) for 6 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 supply. And driven by export, there was also a slight increase in new orders.

As for the twelve sub-indexes, all the indexes were above the critical value of 50%. Compared to the previous month, the indexes for production, inventory of finished products, purchase quantity, inventory of main raw materials, delivery time, and market expectation increased by 0.8-13.8 percentage point(s), while the indexes for harvesting, new orders, export orders, existing orders, purchase price, and employees declined by 1.2-9.7 percentage points.



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

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	68.2	53.3	64.2	63.6	66.8	66.1	-0.7 ↓	Expand
Harvesting Index	42.0	34.1	52.1	66.7	75.0	67.6	-7.4 ↓	Expand
Production Index	75.0	50.0	81.3	61.8	65.0	65.8	0.8 ↑	Expand
New Orders Index	34.6	15.2	22.9	67.6	65.0	55.3	-9.7 ↓	Expand
Export Orders Index	23.9	2.3	14.6	63.3	67.3	58.8	-8.5 ↓	Expand
Existing Orders Index	42.3	63.0	39.6	50.0	61.7	60.5	-1.2 ↓	Expand
Inventory Index of Finished Products	57.7	60.9	60.4	58.8	63.3	65.8	2.5 ↑	Expand
Purchase Quantity Index	34.6	28.3	33.3	61.8	63.3	73.7	10.4 ↑	Expand
Purchase Price Index	98.0	76.1	97.9	73.5	70.0	63.2	-6.8 ↓	Expand
Inventory Index of Main Raw Materials	58.0	56.5	52.1	67.6	66.7	76.3	9.6 ↑	Expand
Employees Index	92.3	56.5	43.8	50.0	55.0	52.6	-2.4 ↓	Expand
Delivery Time Index	44.2	34.8	27.1	58.8	63.3	73.7	10.4 ↑	Expand
Market Expectation Index	50.0	50.0	50.0	55.9	46.7	60.5	13.8 ↑	Expand



Main Challenges Reported by GTI-Ghana Enterprises

- The exchange rate was low.
- The road conditions were poor.
- The power supply was unstable.
- There was a lack of markets and new customers.
- It was difficult to expand into new markets.
- Production costs and equipment maintenance expenses were high.
- Energy (utility) and raw material costs were high.
- Production costs kept increasing, especially as electricity tariffs kept rising.



Main Suggestions from GTI-Ghana Enterprises

- Invest in road network.
- Intensify participation in trade promotion activities and export drive initiatives.
- It's necessary to give government subsidy as well as tax exemption on imported raw materials.
- Obtain sponsorship/support to participate in international trade fairs and exhibitions.

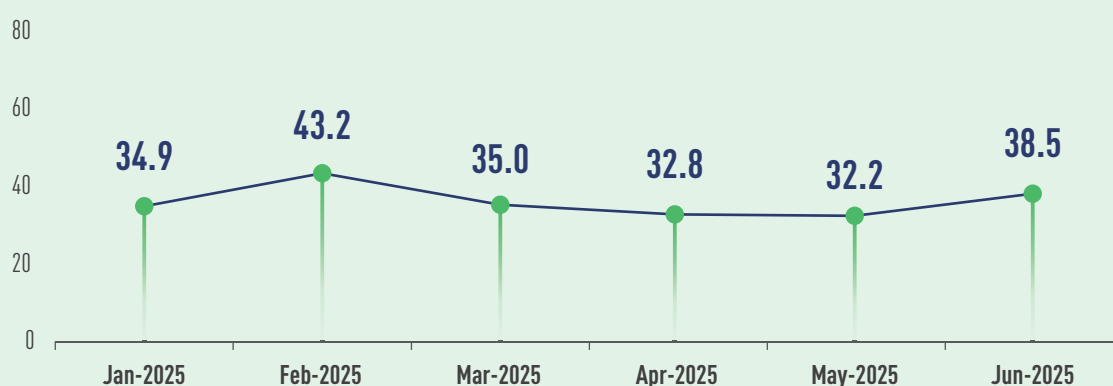


GTI-Brazil Index in June 2025



GTI-Brazil Comprehensive Index

Unit: %



On 18 June, the Monetary Policy Committee of Brazil's Central Bank raised the benchmark interest rate from 14.75% to 15%—its highest level since May 2006. The central bank suggested the rate would stay there for a "prolonged" period – thereby marking a pause, but it still left the door open to more rate hikes if needed to tame inflation. In May 2025, the Brazilian exports of wood-based products (except pulp and paper) decreased 12% in value compared to May 2024, from US\$334.6 million to US\$294.9 million. Among the exported products, exports of tropical plywood decreased 27% in value, while tropical sawnwood exports saw a significant increase of 44%. On 3 June, Brazilian President Lula announced the allocation of R\$825.7 million from the Amazon Fund (Fundo Amazônia) to the Brazilian Institute for the Environment and Renewable Natural Resources (IBAMA), aiming to reinforce environmental monitoring to combat deforestation in the Amazon region, and among the planned actions are the purchase of large helicopters with ballistic protection and high-tech drones, as well as the construction of strategic air bases and helipads in the forests.

In June 2025, the GTI-Brazil index registered 38.5%, an increase of 6.3 percentage points from the previous month, was below the critical value (50%)

for 6 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Brazil index shrank from the previous month, however, the contraction had eased.

As for the twelve sub-indexes, two indexes (inventory of finished products, and purchase price) were above the critical value of 50%, one index (employees) was at the critical value, while the remaining nine indexes (harvesting, production, new orders, export orders, existing orders, purchase quantity, inventory of main raw materials, delivery time, and market expectation) were all below the critical value. Besides, compared to the previous month, the twelve indexes increased by 0.9-10.0 percentage point(s).

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



	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	34.9	43.2	35.0	32.8	32.2	38.5	6.3 ↑	Contract
Harvesting Index	31.3	27.8	39.3	45.5	40.0	40.9	0.9 ↑	Contract
Production Index	30.0	41.7	26.9	33.3	28.6	34.6	6.0 ↑	Contract
New Orders Index	30.0	38.5	32.1	28.1	20.0	30.0	10.0 ↑	Contract
Export Orders Index	33.3	45.8	26.9	30.0	28.6	35.7	7.1 ↑	Contract
Existing Orders Index	50.0	42.3	39.3	40.6	40.0	43.3	3.3 ↑	Contract
Inventory Index of Finished Products	80.0	61.5	50.0	59.4	66.7	70.0	3.3 ↑	Expand
Purchase Quantity Index	38.9	50.0	36.4	25.0	30.0	35.7	5.7 ↑	Contract
Purchase Price Index	55.6	65.0	54.5	57.1	53.8	57.1	3.3 ↑	Expand
Inventory Index of Main Raw Materials	44.4	59.1	37.5	32.1	34.6	39.3	4.7 ↑	Contract
Employees Index	45.0	46.2	46.4	34.4	43.3	50.0	6.7 ↑	Stable
Delivery Time Index	33.3	40.9	37.5	39.3	46.2	46.4	0.2 ↑	Contract
Market Expectation Index	21.4	42.9	28.6	31.3	33.3	36.7	3.4 ↑	Contract



Break Bulk Operation in Belem, Para, Brazil. Photo: teakrc



Biodiversity in Redencao, Para, Brazil. Photo: teakrc



Brief on Brazilian Timber Industry



- During June, Brazilian forestry sector exports were primarily driven by pine sawnwood, which constituted 45% of the total volume, and pine plywood, accounting for 35%. Although the sheer volume of sawnwood was greater, plywood emerged as the revenue leader, generating an impressive US\$ 64.2 million. The United States stood out as the principal destination, with purchases totaling US\$ 27 million during the month. As the sector looks towards the second half of the year, it anticipates a challenging environment. In response, companies are adopting a more cautious strategy, prioritizing internal restructuring, enhancing production efficiency, and exploring new market avenues.
- The forestry sector experienced a decline in demand for sawnwood, wood chips, and logs. This downturn was influenced by several factors: industrial shutdowns, maintenance work at consumer facilities, a general slowdown in civil construction, and higher stock levels held by customers. Furthermore, the market is now characterized by more discerning consumers, particularly concerning product quality, the legal origin of timber, and the implications of international regulations. Key among these are US tariffs, which may diminish the competitiveness of Brazilian products, and the European Union Deforestation Regulation (EUDR), effective in December 2025. A significant challenge for Brazil will be ensuring compliance with the EUDR, given the inherent complexity of its timber traceability chain.
- In parts of Minas Gerais and Paraná, the supply of pine and eucalyptus logs was limited. This was due to a shortage of suppliers and harvesting difficulties caused by increased rainfall. Fortunately, harvesting and transport costs dropped, driven by cheaper diesel and a slowdown in industrial operations.

Information provided by GTI-Brazil Focal Point



Aerial, Operacao, in Florestal, Mato Grosso, Brazil. Photo: teakrc



Veneer Machine in Belém, Brazil. Photo: Fernanda Tocantins



Main Challenges Reported by GTI-Brazil Enterprises

- The international demand was unstable.
- The default of clients in the domestic market was a problem.
- There were uncertainties regarding U.S. tariffs.
- Pressure from falling log and sawnwood prices in India persisted.
- There were delays in the approval of CITES permit, export licenses, and other LPCO documents (Licenses, Permits, Certificates, and Other Documents) by Brazilian Institute for the Environment and Renewable Natural Resources (IBAMA).
- Inclusion of Ipê (Handroanthus) and Cumaru (Dipteryx odorata) in CITES (Appendix II) posed challenges.



Main Suggestions from GTI-Brazil Enterprises

- Expand sales outside of India.
- Speed up the issuance of documentation by IBAMA.
- Acquire new clients in the domestic market.
- Promote the industrialization of the production chain.
- Use technology in the approval process.
- Suggest that IBAMA optimize port management processes.
- A task force set up by IBAMA is necessary to clear the backlog of all processes.



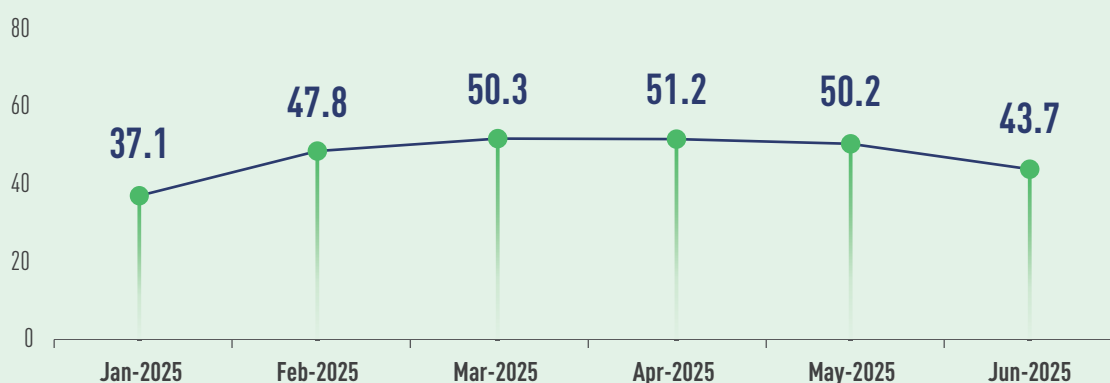
GTI-Mexico Report

GTI-Mexico Index in June 2025



GTI-Mexico Comprehensive Index

Unit: %



In the first quarter of 2025, Mexico's imports of wooden furniture reached US\$64.9 million, a year-on-year increase of 5.5%. Among the imports, China remained the largest source country, with imports from the country valued at US\$22.5 million, up 9.0%, while imports of wooden furniture from the United States dropped significantly by 46.7%. During the Summit for Ecosystem Restoration of Mexico, held on 25-26 June, the Secretariat of Environment and Natural Resources of Mexico (SEMARNAT) officially launched the National Environmental Restoration Program 2025–2030 (PNRA), involving over 100 stakeholders. Key targets of the PNRA include reducing greenhouse gas emissions, and supporting Mexico's zero net deforestation goal by restoring urban parks and forest ecosystems. Insiders in Mexican logistics industry warned that due to the previous customs strike, operations at the Port of Manzanillo might not fully return to normal until October or November. Currently, Mexico has entered the hurricane season, and this year's hurricanes are expected to be more frequent than in previous years, which could further impact port operations.

In June 2025, the GTI-Mexico index registered 43.7%, a decrease of 6.5 percentage points from the previous month, fell below the critical value (50%)

after 3 months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Mexico index shrank from the previous month. This month, the harvesting volume held steady in Mexico, while production volume decreased slightly compared to the previous month. In the meantime, domestic demand increased, while exports shrank significantly.

As for the twelve sub-indexes, three indexes (inventory of finished products, purchase price, and market expectation) were above the critical value of 50%, one index (harvesting) was at the critical value, while the remaining eight indexes (production, new orders, export orders, existing orders, purchase quantity, inventory of main raw materials, employees, and delivery time) were all below the value. Compared to the previous month, the index for inventory of finished products increased by 4.8 percentage points, and the indexes for harvesting, production, new orders, export orders, existing orders, purchase quantity, purchase price, inventory of main raw materials, employees, delivery time, and market expectation declined by 0.3-25.0 percentage point(s).

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	37.1	37.1	50.3	51.2	50.2	43.7	-6.5 ↓	Contract
Harvesting Index	34.1	34.1	59.1	58.3	64.3	50.0	-14.3 ↓	Stable
Production Index	28.9	28.9	55.0	55.3	57.5	44.7	-12.8 ↓	Contract
New Orders Index	39.1	39.1	56.5	54.0	45.5	45.2	-0.3 ↓	Contract
Export Orders Index	50.0	50.0	33.3	25.0	50.0	25.0	-25.0 ↓	Contract
Existing Orders Index	34.8	34.8	47.8	44.0	38.6	38.1	-0.5 ↓	Contract
Inventory Index of Finished Products	30.4	30.4	41.3	46.0	52.3	57.1	4.8 ↑	Expand
Purchase Quantity Index	34.6	34.6	60.7	59.4	50.0	40.0	-10.0 ↓	Contract
Purchase Price Index	71.4	71.4	64.3	67.6	60.7	53.3	-7.4 ↓	Expand
Inventory Index of Main Raw Materials	35.7	35.7	46.4	55.9	60.7	46.4	-14.3 ↓	Contract
Employees Index	37.0	37.0	45.7	48.0	50.0	42.9	-7.1 ↓	Contract
Delivery Time Index	47.5	47.5	39.1	40.0	40.9	38.1	-2.8 ↓	Contract
Market Expectation Index	82.6	82.6	82.6	81.0	75.0	73.8	-1.2 ↓	Expand



Wood Thinning, Mexico. Photo: Santa Genoveva



Finished Product Warehouse, Mexico. Photo: ZEPEMIN



Brief on Mexican Timber Industry



Introduction

The present document describes in detail, tropical timber prices in Mexico for the month of May. These prices are obtained from the Forest Product Pricing System (SIPRE) published by the Mexican National Forest Commission (CONAFOR).

SIPRE is a digital tool through which reference prices of forest products (timber and non-timber) in temperate and tropical climates are registered. Product prices are reported as weighted prices based on the volume of timber production.

Timber prices (\$ USD) for Tzalam (*Lysiloma latisiliquum* Benth)

Tzalam (*Lysiloma latisiliquum* Benth) is a tropical species native to southeastern Mexico, Central America and the Caribbean. This species grows mainly in the states of Quintana Roo and Campeche. During the second half of 2024, a maximum price for Tzalam roundwood of US\$92/m³ and a minimum price of US\$67/m³ was recorded.

Likewise, the average price for select grade Tzalam lumber was US\$2.17/board foot; while the average price recorded for ungraded lumber was US\$1.69/board foot.

Roundwood (Table 1) and sawnwood (Table 2) prices for Tzalam timber are reported at the exchange rate of 19.51 Mexican pesos per dollar, published on May 19, 2025 by Bank of Mexico.

Table 1. Average roundwood prices (\$USD/m³) for Tzalam.

Long dimensional roundwood (primary)		Long dimensional (secondary)		Roundwood
Sold on the forest path	Sold at the sawmill	Sold on the forest path	Sold at the sawmill	
196.48	n/d ¹	98.10	81.68	83.68

¹ No data

Table 2. Average sawnwood prices (\$USD/board foot) for Tzalam.

Long dimensional sawn wood (select)	Long dimensional sawnwood (mill run)	Short dimensional sawnwood
2.17	1.83	1.08

Information provided by GTI-Mexico Focal Point



Main Challenges Reported by GTI-Mexico Enterprises

- There was a decline in product sales.
- Climate affected production and operations.
- 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.
- Bureaucracy in forest management procedures was a problem.
- Sales channels were limited, or channel development was insufficient.



Main Suggestions from GTI-Mexico Enterprises

- Optimize forest management processes.
- Make improvements in the planning of logistics processes within the industry.
- Strengthen capacity building to improve wood processing processes.
- Improve roads for the transportation of products.
- Fully expand the sales and distribution channels 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 changes to legislation to reduce imports of products.



Material Selection, Mexico. Photo: ZEPEMIN



Production of Slatted Board, Mexico. Photo: ZEPEMIN

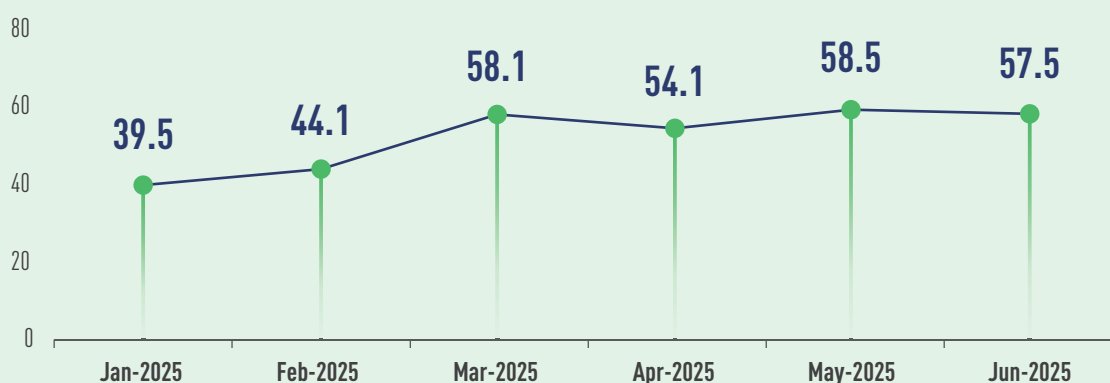


GTI-China Index in June 2025



GTI-China Comprehensive Index

Unit: %



Customs data shows that in May 2025, China's total wood imports reached 4.966 million cubic meters, a 17% decrease compared to the same period in 2024. Specifically, log imports stood at 2.961 million cubic meters, down 18.5% year-on-year, while sawnwood imports reached 2.005 million cubic meters, down 14.9%. It is worth noting that the export of African wood to China continued to shrink, as in the first five months, the total export volume was 813,700 cubic meters, indicating a 31% decrease. On 11 June, China announced that it would implement the policy of granting 53 African countries having diplomatic relations with China zero-tariff treatment for 100 percent tariff lines, expanding the scope from 33 countries, with newly added countries such as Gabon, the Republic of the Congo, Ghana, Cameroon, and Angola. Wood products would also enjoy zero-tariff treatment, which is expected to boost the export of wood from African countries to the Chinese market. Recently, China's plywood industry faced significant export challenges. On 12 June, the U.S. Department of Commerce announced the initiation of antidumping duty and countervailing duty investigations on hardwood and decorative plywood from China, Indonesia, and Vietnam, and the preliminary antidumping duty rate for Chinese products was set at 504.07%, far exceeding the rates of 138.04% - 152.41% for Vietnamese products and 84.94% for Indonesian products. On 10 June, the European Commission officially announced a preliminary affirmative determination in the

antidumping duty investigation of hardwood plywood from China. Except for an enterprise subject to a 25.1% provisional antidumping duty, other Chinese companies face a rate of 62.4%.

In June 2025, the GTI-China index registered 57.5%, a decrease of 0.1 percentage point from the previous month, was above the critical value (50%) for 4 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 sector still saw an upward trend on both production and consumption sides, however, the expansion was not so obvious.

As for the sub-indexes, all the twelve indexes were above the critical value of 50%. Compared to the previous month, the index for inventory of finished products increased by 0.2 percentage point, while 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 declined by 0.2-1.7 percentage point(s).

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

	2025.01	2025.02	2025.03	2025.04	2025.05	2025.06	MoM	Performance
Comprehensive Index	39.5	44.1	58.1	54.1	58.5	57.5	-1.0 ↓	Expand
Production Index	37.9	41.4	62.1	59.1	63.4	62.4	-1.0 ↓	Expand
New Orders Index	35.7	40.5	61.3	53.6	57.0	55.9	-1.1 ↓	Expand
Export Orders Index	42.9	44.0	50.8	53.2	56.7	56.0	-0.7 ↓	Expand
Existing Orders Index	37.4	41.4	54.3	52.3	53.5	52.6	-0.9 ↓	Expand
Inventory Index of Finished Products	41.2	49.1	52.7	55.5	51.1	51.3	0.2 ↑	Expand
Purchase Quantity Index	37.9	43.1	62.1	53.2	59.5	57.8	-1.7 ↓	Expand
Purchase Price Index	50.5	50.0	55.5	52.3	54.6	53.6	-1.0 ↓	Expand
Import Index	45.6	50.0	55.2	47.5	56.0	55.7	-0.3 ↓	Expand
Inventory Index of Main Raw Materials	46.7	48.3	55.9	45.9	52.8	52.6	-0.2 ↓	Expand
Employees Index	35.2	44.0	51.2	50.5	57.0	55.6	-1.4 ↓	Expand
Delivery Time Index	50.5	53.4	55.5	56.8	59.2	58.5	-0.7 ↓	Expand
Market Expectation Index	55.5	67.2	67.4	56.4	61.3	60.0	-1.3 ↓	Expand



Main Challenges Reported by GTI-China Enterprises

- The overall economic environment was not so good.
- Enterprises struggled with insufficient orders.
- There was intense competition in terms of market prices.
- Raw material costs were high, and demand for products was not enough.



Main Suggestions from GTI-China Enterprises

- Regulate practices in the industry.
- Broaden financing channels.
- Hope for government support for timber enterprises.
- Expand into international markets to increase the volume of orders.

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.

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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.



全球林产品绿色供应链倡议
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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