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Ingredients for a sustainable tropical timber sector

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Biosphere reserve in Indonesia
Biennial review of tropical timber markets
Lesser-used timber species
Market trends

ITTO

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Cover image: A pile of tropical timber logs in a logyard in Nilambur, India—symbolizing the building blocks of a sustainable tropical timber sector. *© Paula Sarigumba/ITTO*

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EDITORIAL

Ingredients for a sustainable tropical timber sector

A sustainable tropical timber sector can be achieved through the combined and cumulative impact of many related advances rather than a single dramatic leap. Each advancement in governance or management practices, each innovation in genetics and processing, and each expansion of market knowledge brings our objective closer. This edition of Tropical Forest Update explores how stakeholders across the sector are taking these essential steps—sometimes under difficult circumstances—to ensure that tropical forests continue to thrive, provide timber, livelihoods and environmental benefits for generations to come.

The articles in this issue illustrate a sector that embodies adaptive improvement. From renegotiating international frameworks to implementing second-phase projects, from revitalizing dormant institutions to tracking evolving market dynamics, the work of building sustainability proceeds through patient, iterative and continuous effort.

Our lead article reports on the 61st session of the International Tropical Timber Council (ITTC), held in Panama City in October 2025. The Council approved new funding for seven projects and activities, extended the mandate of the Preparatory Working Group for negotiations on a successor to the International Tropical Timber Agreement, ITTA 2006, and approved ITTO's Biennial Work Programme and administrative budget for the 2026–27. These decisions represent critical steps in ensuring the Organization continues to be fit for purpose as it approaches its 40th anniversary. The discussions highlighted both the complexity of achieving consensus on the future direction of international cooperation on tropical sustainable forest management and the resolve of member countries to maintain momentum toward legal and sustainable supply chains.

A month earlier, the 5th World Teak Conference, held in partnership with ITTO in Kochi,India, gathered participants from dozens of countries to explore the latest developments in one of the world's most valuable timber species. As S. Sandeep and M.P. Sreelakshmy of the TEAKNET Secretariat describe, the conference demonstrated how sustained research, improved silviculture, and enhanced market intelligence can strengthen a specific timber sector. A side event highlighted ITTO's initiative to enable smallholders in Asia and Africa to produce higher quality teak, building on an earlier successful teak project across the Greater Mekong region.

An ITTO project in Indonesia's Giam Siak Kecil–Bukit Batu Biosphere Reserve shows how patient institution-building can revitalize landscape-scale conservation and sustainable use. Dyah Puspasari and colleagues from the Indonesian Ministry of Forestry explain how, after years of weakened coordination, the project helped re-establish the reserve's governing forum, develop an integrated management plan, and promote alternative livelihoods for local communities. The work illustrates that effective management depends not just on plans and structures but on political commitment and meaningful community engagement.

ITTO's recently published Biennial Review and Assessment of the World Timber Situation documents a tropical timber trade under strain. Summarizing their findings for TFU, Review authors Frances Maplesden and Jean-Christophe Claudon highlight how imports of tropical logs reached a historic low in 2024, while exports of secondary processed wood products contracted sharply in 2023. The data show a sector buffeted by China's property market downturn, weak consumer confidence in major markets, supply chain disruptions, and rising regulatory burdens. Yet understanding these market realities is itself a crucial step—one that allows producers and traders to adapt strategies and seek new opportunities.

Mohammed Nurudeen Iddrisu, ITTO's Director of Trade and Industry, argues in his article that lesser-used timber species represent an underutilized pathway through current trade turbulence. By diversifying beyond a narrow range of commercial species, producers can relieve pressure on overharvested species while opening new market opportunities. This requires research partnerships, improved wood protection technologies, and market promotion.

Finally, our market trends feature examines China's declining tropical timber imports in detail, linking them to the country's real estate slump and weak domestic consumption. The article by Mike Adams also describes government measures intended to boost domestic demand, including lower tariffs on wood products and support for affordable housing.

Together, these articles illustrate that building a sustainable tropical timber sector is incremental work requiring persistence, collaboration and adaptation. Each advancement matters, and each contributes to a sector better equipped to meet the challenges ahead.


SIXTY-FIRST SESS
OCTOBER 27-31, PANA
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Ambassador of Indonesia to Panama
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Vice-Minister of the Environment, Costa Rica
Mr. Carlos Espinosa Peña
Chairperson of the ITTC

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Members keep ITTO on course

The International Tropical Timber Council has backed the Organization's new work programme and taken steps toward a new international agreement for the tropical timber trade

by ITTO Secretariat
(itto@itto.int)

The International Tropical Timber Council has taken important steps toward enabling ITTO to adapt to the present needs and future challenges. The Council concluded by authorizing new funding, approving new projects, and continuing efforts toward the negotiation of a new international agreement for the tropical timber trade.

The Council, ITTO's governing body, meets once a year to discuss a wide-ranging agenda aimed at promoting sustainable forest management (SFM) and the trade of sustainably produced tropical timber and wood products. About 80 delegates and observers attended its 61st session (ITTC61) on 27–31 October 2025 in Panama City, Panama.

Participants and delegates posed for a photo as the 61st session concluded in Panama City. *© ITTO*

The session also explored global timber market developments, including the impact of new trade regulations, the interface between tropical timber and biodiversity conservation, and reviewed ITTO's performance and prospects.

Following substantive discussions throughout the week, the Council decided to extend by a year the mandate of the Preparatory Working Group (PWG) to initiate the negotiation process of a new International Tropical Timber Agreement (ITTA). The current Agreement expires in 2029.

Issues deliberated by delegates from ITTO's consumer and producer members included the coverage of the new Agreement, the Organization's mandate, financing and membership structure.

Another Council decision authorized financing totalling USD 3.4 million, which will be funded through voluntary contributions from members, for the implementation of 7 ITTO projects, pre-projects and activities. New funding was pledged during the meeting by Australia and Canada and received prior to the Council, and by Japan, and Macao SAR, China.

Funding was allocated, for example, to the second phase of a project to enable sustainable management of the Fosse-aux-Lions Gazetted Forest in Togo; a project to strengthen technical and business management capacity in Peru's forest industry; and for a bioeconomy project based on Viet Nam's acacia resources.

The Council also approved the organization's administrative budget for 2026–2027 and ITTO's Biennial Work Programme, including funding for the conservation and sustainable use of biodiversity in tropical production forests and the ITTO Fellowship Programme.

Calls for cooperation

ITTC61 had begun with calls for doubling down of cooperation and commitment to ITTO's objectives as the Organization negotiates a period of global political and economic turbulence.

Council Chairperson Carlos Espinosa Peña of Panama, welcoming delegates on the first day, noted the symbolic significance of meeting in his country—a biodiversity hotspot and a bridge between two hemispheres.

"Panama, a bridge of the world, can also be a bridge between producers and consumers as they undertake discussions on the role and mandate of ITTO," he said.

Executive Director of the ITTO, Ms Sheam Satkuru, reminded participants of ITTO's role in highlighting the contributions of tropical forests to climate change mitigation and adaptation, biodiversity conservation, and the Sustainable Development Goals (SDGs).

"Almost all 17 SDGs are touched by forests and people in some way," Ms Satkuru said. "We must also remember the roles of local communities and indigenous peoples, who depend on the forests for their livelihoods."

Civil society and business voices

The second day of the session was devoted to the voices of ITTO advisory groups representing civil society and the timber industry.

A panel discussion of the Civil Society Advisory Group (CSAG) gathered experts, practitioners and government representatives to explore how SFM in the tropics can integrate biodiversity conservation and livelihoods, including under the Kunming-Montreal Global Biodiversity Framework.

Presentations showcased experiences from Africa, Asia, and Latin America, illustrating how communities, governments, and civil society are working together to balance ecological protection with socio-economic opportunity.

The CSAG, in its statement, said the negotiation of a new international agreement for tropical timber is an opportunity for ITTO to "align its mission with the urgency of the climate, biodiversity and equity crises."

Sustainable tropical timber trade must be "intrinsically tied to the health of natural forests, the rights and security of indigenous peoples and local communities, including women and youth, and transparent governance," the CSAG said.

It urged the Council to ensure that more funding will be directed to SFM and community-led conservation, and that Kunming-Montreal Global Biodiversity Framework targets are embedded in ITTO's Strategic Action Plan.

The ITTO's Trade Advisory Group (TAG) convened its annual Market Discussion, with a focus on market trends, regulatory developments and private-sector responses shaping the global tropical timber business.

In its statement, TAG warned that trade policy volatility, declining consumer confidence and growing regulatory burdens had manifested in creating a period of "profound uncertainty" that represents an "existential threat to forests, the trade, and ITTO."

Speakers warned that, as well as restricting market access, disrupting supply chains, and upsetting business plans, these pressures risk accelerating the use of alternative materials such as steel and concrete that carry higher carbon footprints and the conversion of more forests to agriculture and other uses. The group also raised concern about the growing number of timber species listed under the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), continued uncertainty about the implementation of the EU Deforestation Regulation, and consumer attitudes toward tropical timber.

TAG said it would form a working group to analyse the causes of the declining international tropical timber trade and present recommendations to the Council.

Toward a new international agreement

The third day of the Council included exploration of a new international Agreement to govern the sustainable management of tropical forests and the international tropical timber trade.

The current ITTA entered into force in 2011 for an initial duration of 10 years and has been extended twice (first for 5 years and second for 3 years, respectively) – the maximum allowable in the ITTA statutes. The PWG mapping the pathway to a new Agreement is proposing that negotiations begin in 2027.

During discussions in Panama, ITTO members debated whether a future Agreement should expand to cover areas such as non-timber forest products, ecosystem services, tropical forest plantations, and more diverse wood products, while others warned against overlapping with existing international efforts. Many emphasized the need to first address current challenges—particularly financing—and highlighted the importance of timely payment of assessed contributions by members and participation by all members in the negotiation process. Members also considered possible changes to ITTO's membership structure, though views differed on shifting to a single or hybrid category due to implications for voting rights and financial contributions.

Producer members, meanwhile, reported the establishment of three new regional coordination groups for Africa, Asia and Latin America, to strengthen internal consultation and ensure producer voices are well represented in discussions on the new Agreement.

In its Decision, the Council asked the PWG to work with the ITTO Secretariat to identify and analyse priority elements and issues and submit a report, with recommendations, to the 62nd session of the Council (ITTC62). A first meeting of the Preparatory Committee for the negotiations will be held in conjunction with ITTC62, which will celebrate the Organization's 40th anniversary and take place in Yokohama, Japan in November 2026.

Looking ahead

Following five days of intense discussions, collaboration and decision-making, ITTC61 concluded with a reminder from the Chairman that tropical forests are more than just timber sources, highlighting their biodiversity and social value. Mr Espinosa Peña called on members to maintain momentum toward legal and sustainable supply chains and stronger international cooperation, including participating effectively and fully in the negotiation of a new Agreement.

"ITTO's work makes it an essential partner in tropical forest governance. I urge all members to continue the important work discussed here in Panama to sustain tropical forests," he said.

The CSAG Panel on the 2nd day of the 61st Council session. *© ITTO*

The incoming ITTC Chair presents a commemorative token to the outgoing Council Chair. *© ITTO*

Dignitaries lighting the traditional lamp to mark the ceremonial opening of the conference. *© KFRI*

Brainstorming for sustainable teak

The 5th World Teak Conference bundled wide-ranging expertise to explore key issues facing the development of the sustainable teak sector

by S. Sandeep and M.P. Sreelakshmy
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The 5th World Teak Conference drew more than 300 participants to discuss the latest developments in trade, management, innovation, and business collaboration for one of the world's most valuable tropical timber species and a flagship of efforts to advance sustainable forest management.

Representatives of government institutions, the private sector, universities, research institutes and local communities from 43 countries shared knowledge, experience and ideas during the conference, held 17–20 September in Kochi, India.

Co-organized by ITTO, the conference was hosted by the Kerala Forest Research Institute (KFRI) and coordinated by the international Teak Information Network (TEAKNET). Previous World Teak Conferences were held in Costa Rica (2011), Thailand (2013), Ecuador (2015), and Ghana (2022).

The 2025 conference took place amidst shifting global trade dynamics, promising scientific advances, and the emergence of teak production models designed to combine economic viability with social and environmental sustainability.

The opening plenary featured financial analysis, value addition, and the evolution of legal supply chains in the teak sector. In a keynote address, Walter Kollert of WaKa-Forest Investment Services AG and Arvydas Lebedys of the Food and Agriculture Organization of the United Nations (FAO) outlined global teak trade dynamics. In 2024, teak log production was about 2.5 million m^3, they estimated, with India accounting for nearly 87% of imports. Since Myanmar's log export ban in 2014, supply chains have shifted toward Brazil and Latin America, they noted. The session also discussed issues including classification challenges in furniture markets, and declining African teak prices linked to quality issues.

Several technical papers complemented the discussion. Sarwar Jahan of the Council of Scientific and Industrial Research, Bangladesh, described the characteristics of teak grown in plantations in his country, noting improvements in density and fibre quality as trees matured. Mauricio Jerez-Rico of the University of Los Andes, Venezuela, demonstrated the use of OPTITEK V 2.0 software for optimizing plantation rotations and financial outcomes. And Ani A. Elias of the Institute of Forest Genetics and Tree Breeding, India, introduced an AI-driven system for the rapid and precise estimation of plantation volume.

ITTO flagship

The first day of the conference also featured a session centred on a flagship ITTO project. Titled "Promoting Quality Timber Production in Smallholder and Community-based Teak and Other Valuable Species Plantations in the Tropics" and supported by the Government of Germany, the project has been under implementation since 2023 in Cambodia, India, Indonesia, Thailand, Togo and Viet Nam.

In her opening remarks, Sheam Satkuru, ITTO's Executive Director, highlighted teak's economic, ecological, cultural and policy relevance while stressing the importance of global collaboration in advancing the project's goals.

In the presentations that followed, Yongyut Trisurat of Kasetsart University, Thailand, outlined the progress already made through the project, for instance in genetic improvement, innovative financing, silvicultural optimization, and knowledge-sharing. Other speakers provided perspectives from the participating countries.

ITTO Executive Director Sheam Satkuru opens the 5th World Teak Conference. *© KFRI*

Anto Rimbawanto of the National Research and Innovation Agency, Indonesia, emphasized the socioeconomic contributions of Indonesia's 1.7 million hectares of teak plantations, with 40% managed by smallholders, while drawing attention to challenges like climate change and market distortions. Cheat Vinchet of the Department of Forest Plantation and Private Forest Development, Cambodia, discussed national initiatives for plantation growth and supportive policies, including tariff reductions to encourage investment. R. Yasodha of the Institute of Forest Genetics and Tree Breeding, India, highlighted clonal propagation, short-rotation teak, and the persistent value of older, high-quality trees. Dang Thinh Trieu of the Vietnamese Academy of Forest Sciences presented plans to expand the country's plantations to 1 million hectares, supported by tissue culture and training programmes.

Mr. Tomoyuki Honda of the Forestry Agency of Japan delivering a presentation. *© KFRI*

Further presentations related to clonal test plans in Thailand, provenance trials in Togo, integrated pest control strategies, and financing models to support smallholder growers across Asia and Africa. The discussion round focused on biodiversity concerns and soil parameters in plantation management, acknowledging the balance required between teak's economic potential and ecological sustainability.

Teak genetics

The second day of the conference began with a session on advances in teak genetics and stand management in both natural and planted teak forests. Keynote speaker Doreen Goh of YSG Bioscape, Malaysia, provided an overview of the global significance of teak and the threats posed by overexploitation and genetic erosion. She emphasized that micropropagation techniques and tissue culture can be key tools for producing uniform, disease-resistant clonal teak and maintaining genetic diversity.

Leonarda Grillo Neves of the Universidade do Estado de Mato Grosso, Brazil, highlighted the registration of 19 teak cultivars resistant to *Ceratocystis* wilt, which were verified using SSR markers and DNA barcoding, thereby enhancing traceability, certification, and export competitiveness. Ashwath M.N. of the University of Agricultural Sciences, India, provided insights into the identification of genetic traits and markers linked to teak's ability to tolerate drought. Naoki Tani of the Japan International Research Center for Agricultural Studies presented an analysis of Asian teak populations that revealed the high adaptability and resilience of Malabar teak and identified temperature as a critical driver of teak's adaptive genetic diversity. Finally, Olman Murillo of the Instituto Tecnológico de Costa Rica, who also chaired the session, detailed how hybridization in Latin America has reduced teak rotation lengths from 20 to 16 years while improving productivity by 25–40%.

Responsible sourcing

The Forest Stewardship Council (FSC) hosted a dedicated session on responsible sourcing of teak, focusing on certification standards, supply chain integrity, and regulatory compliance, particularly in the context of the EU Deforestation Regulation (EUDR). In a keynote address, Cindy Cheng, Regional Director, FSC Asia-Pacific, outlined FSC's global strategies for responsible sourcing, highlighting the growing significance of certification in maintaining market access and credibility.

The session featured presentations on topics including FSC's principles and certification frameworks, implications of the EUDR for the teak value chain, and FSC's block chain-based system for automated verification and compliance. Panellists underscored that FSC compliance aligns closely with national regulatory frameworks and contributes to market premiums for certified teak.

During a subsequent panel discussion, experts including the ITTO Executive Director emphasized the need for standardized data systems, quality controls, recognition of smallholder contributions, and value-chain innovations to strengthen productivity and competitiveness. Panellists also addressed the premium status of teak, debating the risks of substitution versus opportunities to reposition teak as a sustainable, climate-positive asset. The impacts of climate change, financing constraints, and limited access to scientific support for growers were identified as key barriers.

> **Planted teak forests, if managed sustainably, can provide timber, enhance biodiversity, contribute to climate mitigation, and support smallholder livelihoods**

Smallholder models

The final day of formal discussion began with a session on management models for smallholder teak plantations and agroforestry systems. Irvine Kanyemba of Kilombero Valley Teak Company, Tanzania, shared the company's experience with smallholder teak plantations, including an out-grower support programme that encompasses 571 farmers managing about 1,000 ha of teak. The programme supports farmers with inputs, extension services, and partial cost coverage in return for harvest-sharing.

Patrick Gomes of the Forest Department, Sri Lanka, presented research on teak coppice management systems. Stand-level volume, rather than individual tree dimensions, should guide management decisions to optimize yield in coppice systems, he said. Valerie Fumey Nassah and Kwame Agyei of the Forestry Commission of Ghana discussed a smallholder agroforestry approach combining timber plantations with food crops on deforested forest fringes that accounts for 30% of Ghana's total plantation area, demonstrating its role in landscape restoration, climate resilience, and local livelihoods. Certification and carbon credit accounting were integrated into the programme. Peter Ige from the University of Ibadan, Nigeria, presented site management models for optimum teak yield in southern Nigeria and highlighted that teak plantations provide a sustainable alternative to natural forest depletion while supporting local economies.

Resilient landscapes

The final session of the conference focused on the ecological and socio-economic benefits of resilient, diversified forestry systems. Sutthathorn Chairuangsri of Chiang Mai University, Thailand, opened with a presentation on the diversification of monoculture plantations, noting that over 90% of teak plantations are monocultures. Diversification at genetic, species, and structural levels enhances resilience, supports ecosystem services, and provides socio-economic benefits, she said, highlighting biodiversity credit certification, agroforestry, mixed-species plantations, and landscape-level restoration as effective strategies.

Aswathy K. Vijayan of the Kerala Forest Research Institute, India, presented a geospatial analysis of environmental resilience in teak plantations, focusing on carbon storage, wildfire risk, and water stress. She recommended restoration measures including soil and water conservation structures to enhance plantation resilience. Nelly Bedijo of FAO highlighted government initiatives for forest restoration in Uganda, including mixed-species woodlots, agroforestry, and public–private partnerships, with emphasis on small- and medium-scale exotic plantations to balance ecological and economic objectives. Gisèle Sinasson Sanni of the University of Abomey-Calavi, Benin, presented a case study on the Lama Teak Forest landscape, describing an integrated management plan combining teak plantations, biodiversity conservation, firewood production, agroforestry, and community engagement. She stressed equitable revenue sharing, participatory management, and the critical role of local communities in forest landscape restoration.

In the last panel discussion, speakers emphasized that while teak plantations are economically important, scientific research and management practices are essential to maintain biodiversity and ecological integrity. The panel concluded that planted teak forests, if managed sustainably, can provide timber, enhance biodiversity, contribute to climate mitigation, and support smallholder livelihoods. Certification, integrated landscape planning, and adaptive management were underscored as key tools for achieving resilient, productive, and ecologically sound teak plantations.

Walter Kollert of WaKa-Forest Investment Services AG delivering his keynote address. *© KFRI*

The conference closed by recommending that stakeholders in the teak sector:

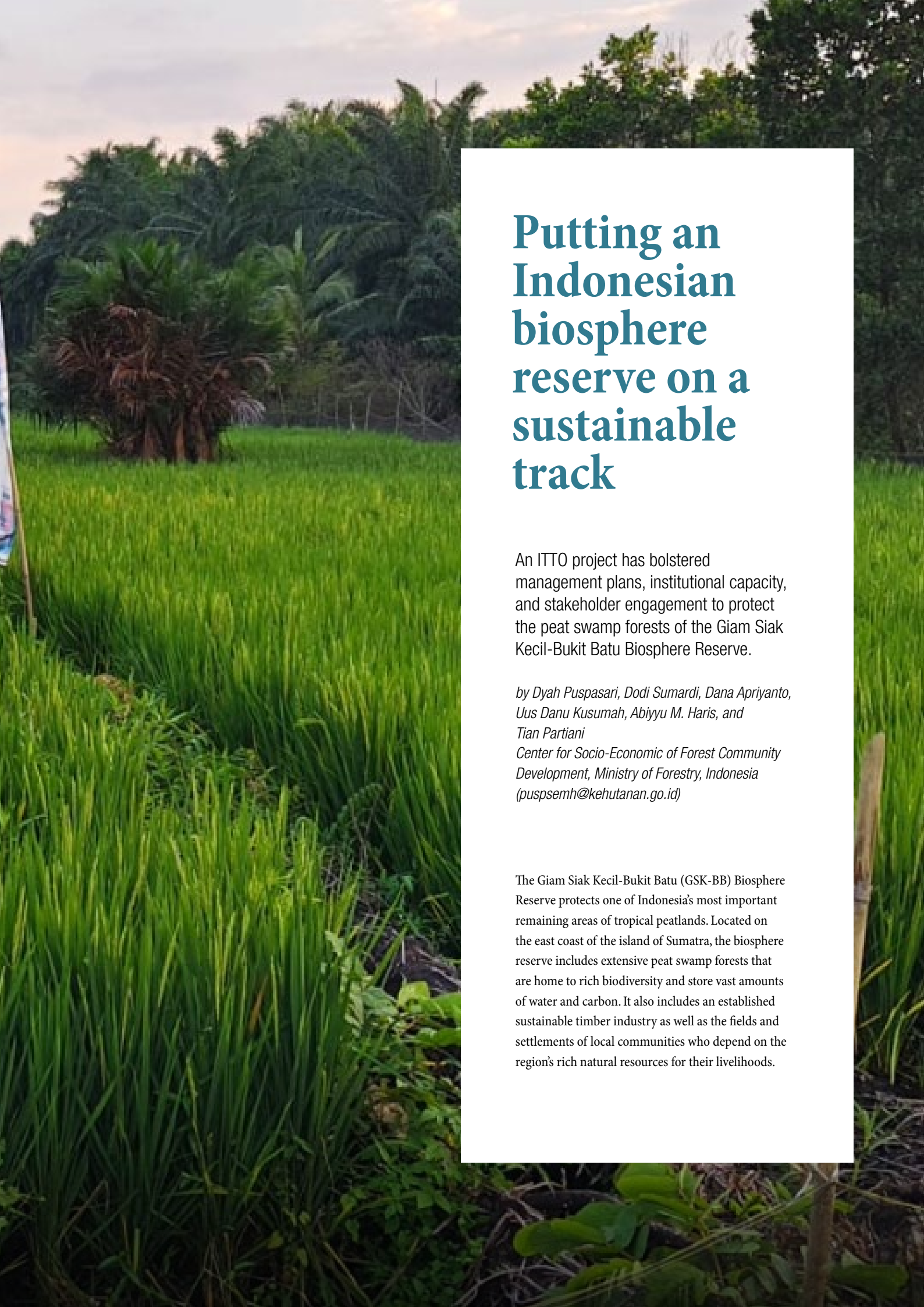
- Support research efforts to diversify existing monoculture plantations with multi-species planted forests and agroforestry production systems;
- Explore possibilities to replace harmful fumigating agents with eco-friendly fumigation methods for imported wood products;
- Investigate new methods using artificial intelligence to record stand data in forest surveys and inventories;
- Support the mass propagation of superior planting material by establishing clonal plantations;
- Investigate the institutional, organizational and logistical challenges facing smallholder growers;
- Facilitate capacity building for local communities and field workers, particularly in teak management techniques and intercropping of teak with agricultural crops;
- Investigate opportunities to link teak plantations with carbon credit markets;
- Commit more resources to research and development to advance the sustainable management of planted teak forests, with emphasis on quality and optimum harvesting cycles; and
- Facilitate and enhance opportunities for TEAKNET to establish comprehensive networks among teak producers, traders and the wood processing industry.

Details of the presentations made at the 5th World Teak Conference as well as a closing report are available at: https://teaknet.org/

Implementers of the ITTO-BMLEH teak project convened in Kerala to share insights and experiences with other industry stakeholders. *© KFRI*

Dr. Tetra Yanuariadi and Ms. Paula Sarigumba at the opening of the ITTO-BMLEH Teak Session. *© KFRI*

The Makmur Jaya Women's Farmers Group (KTWMJ) dryland rice demonstration plot in Temiang Village.
© Ministry of Forestry, Indonesia



Putting an Indonesian biosphere reserve on a sustainable track

An ITTO project has bolstered management plans, institutional capacity, and stakeholder engagement to protect the peat swamp forests of the Giam Siak Kecil-Bukit Batu Biosphere Reserve.

by Dyah Puspasari, Dodi Sumardi, Dana Apriyanto, Uus Danu Kusumah, Abiyyu M. Haris, and Tian Partiani
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The Giam Siak Kecil-Bukit Batu (GSK-BB) Biosphere Reserve protects one of Indonesia's most important remaining areas of tropical peatlands. Located on the east coast of the island of Sumatra, the biosphere reserve includes extensive peat swamp forests that are home to rich biodiversity and store vast amounts of water and carbon. It also includes an established sustainable timber industry as well as the fields and settlements of local communities who depend on the region's rich natural resources for their livelihoods.

A newborn endangered Sumatran elephant plays with her mother in Tesso Nilo National Park, Riau Province, Indonesia.
© Afrianto silalahi

The designation of the area as a biosphere reserve in 2009 was a milestone in efforts to advance the conservation and sustainable use of these resources. However, authorities have faced challenges in implementing sustainable practices and containing harmful human impacts that continue to degrade the reserve's forests and other ecosystems.

Through an ITTO project that began in 2023 and has now completed its field activities, a wide range of stakeholders, including local timber businesses as well as Indonesian authorities, have taken concrete steps to address these challenges by collaborating to strengthen local planning frameworks, revitalize the reserve's management body, and encourage local communities to adopt more sustainable livelihoods.

Peat swamp forests

Established under UNESCO's Man and the Biosphere Programme, the GSK-BB Biosphere Reserve extends over about 705,000 hectares in the Bengkalis, Siak, and Dumai Districts of Riau Province.

As well as peat swamp forests, the reserve includes mangroves, wetlands, plantations, and agricultural fields. There are 53 villages in or near the reserve, with a total population of about 100,000 people. These landscapes sustain key ecological services—flood and climate regulation, and freshwater storage—while harbouring rich animal and plant diversity, including threatened species such as the Sumatran elephant, tiger, and sun bear.

Almost two-thirds of the reserve is covered with peat soils, estimated to store around 1.7 billion tons of carbon.

Like many biosphere reserves under the UNESCO programme, the reserve is divided into three functional zones: a core zone (178,722 ha; 25.3%) comprising conservation forests but also unconverted natural production forests; a buffer zone (222,426 ha; 31.5%) dominated by industrial plantation forests; and a transition zone (304,123 ha; 43.1%) encompassing settlements, agriculture, industry, and infrastructure intertwined with habitat corridors.

Challenges and gaps

Despite its rich environmental resources, the reserve faces significant ecological challenges. The peatland ecosystem in the area is under considerable pressure, as reflected in a sustainability index score of 46.5%, which is categorized as "less sustainable" (<50%) according to Zulkarnaini et al. (2022). Further field observations by Zulkarnaini reinforce this assessment, revealing ecosystem damage and quality degradation, including land degradation, illegal logging, and land conversion.

A study based on satellite imagery from 1999, 2009, and 2019, also confirmed this ecological pressure. Over two decades, natural forest cover decreased by 65.18%, from 475,504 ha in 1999 to 165,578 ha in 2019. The most recent spatial data update from the ITTO project (2023) indicates a further decline to 162,206.15 ha. These changes in land cover highlight a consistent trend of declining natural forest area, accompanied by an increase in other land cover types (Afriadi et al., 2021).[1]

A wide range of stakeholders including government, the private sector, NGOs and local communities are engaged in the three functional zones of the reserve. Initiatives were undertaken to strengthen reserve operations, including capacity building, ecosystem restoration, and encouragement for local communities to adopt sustainable practices. However, those efforts remain constrained by factors including a weak planning framework, insufficient institutional capacity, and limited support from local stakeholders.

Management gaps are a crucial challenge. The board established in 2010 to coordinate activities in the reserve became inactive following structural changes within the Riau Provincial Government and disruptions caused by the COVID-19 pandemic in 2020. Consequently, coordination among stakeholders weakened, monitoring systems lapsed, and implementation of UNESCO biosphere reserve standards declined.

The ITTO project

A pair of ITTO-supported projects aims to re-establish effective management of the reserve by addressing these gaps in two phases. In the current phase I project,[2] the focus has been on developing a foundation—planning, institutions, and participation. This project is setting set the stage for a potential follow-up project[3] designed to secure wide adoption, solid financing, and long-term implementation.
The phase I project is being implemented by agencies of the Indonesian Forestry Ministry in collaboration with Sinarmas

[1] Afriadi, A., Wicaksono, A. D., & Firdausiyah, N. (2021). Spatial Modeling of Deforestation in Giam Siak Kecil – Bukit Batu Biosphere Reserve, Riau Province. International Journal of Science and Research (IJSR), 10(9), 193–199. https://doi.org/10.21275/SR21808104714
[2] Project PD 712/13 Rev.3 (F) – Phase I
[3] Project PD712/13 Rev.3 (F) - Phase II

Forestry, a commercial timber company operating in the reserve. The company has also co-funded the project alongside the Government of the Republic of Korea.

The project began with a focus group discussion on a planning framework involving stakeholders including government agencies, academia, NGOs, the private sector, and local communities. In the discussion, the participants underlined the need for institutional revitalization, improved mapping systems, and enhanced capacity building to pave the way for sustainable management of the reserve.

The project team subsequently developed a planning structure that not only organizes current efforts but also ensures long-term direction, accountability, and stakeholder integration. Key achievements and elements of the structure include:

- **Updated spatial data** – Compilation of 11 thematic forestry datasets, covering forest designations, social forestry, land tenure, deforestation, and area-use approvals.[4]
- **Comprehensive Desk study** – A detailed review of the reserve's biophysical and socio-economic conditions was carried out to support adaptive planning.[5]
- **Digital platforms** – Launch of a website (https://gskbb-biosphere.org) and database (https://database.gskbb-biosphere.org) to support outreach, planning, implementation, monitoring, reporting, and documentation.
- **Management plan** – Development of an Integrated Strategic Management Plan 2024–2028, encompassing 11 programs and 97 activities involving 41 partners across all zones.[6]
- **Funding proposal** – Submission of a proposal titled "Optimizing the Management of GSK-BB BR in Support of Indonesia's FOLU Net Sink 2030"[7] under the result-based contribution (RBC) funding mechanism agreed between Norway and Indonesia.[8] The proposal has passed the first verification phase and is being revised for final approval.

> **An ITTO project has bolstered management plans, institutional capacity, and stakeholder engagement to protect the peat swamp forests of the Giam Siak Kecil–Bukit Batu Biosphere Reserve**

[4] 1203829364_ENG-REPORT ON THE SPATIAL DATA DEVELOPMENT FOR THE ZONATION OF GSKBB BIOSPHERE RESERVE.pdf
[5] https://database.gskbb-biosphere.org/arsip/1928109945_1.3.ENG-Report_Review_BiophysicP_GSK_BB.pdf
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[8] www.nicfi.no/partner-countries/indonesia/

Re-establishing governance

Following a five-year hiatus, the coordinating board of the reserve was revitalized as the Giam Siak Kecil–Bukit Batu Biosphere Reserve Management Coordination and Communication Forum. The Forum was formally established through a decree issued by the Governor of Riau in August 2025.

The Forum is chaired by the Head of the Riau Regional Development Planning Agency, thereby strengthening institutional coordination and ensuring alignment with regional development plans. The Governor serves as the Forum's Patron, providing strategic oversight and policy guidance.

The Forum convened its inaugural coordination meeting on 17 September 2025, immediately addressing the need to unify efforts, harmonize programmes, and enhance cross-sectoral communication. This meeting resulted in the adoption of the Forum's work plan for the 2025–2028 period. To support its operations, a Secretariat has been established, equipped with upgraded facilities and office infrastructure to enable effective day-to-day management.

Other significant achievements by the Ministry of Forestry include the development of the Biosphere Reserve Management Standard, covering environmental management, monitoring, and compliance procedures, and certified by the Agency for Standardization of Environment and Forestry Instruments. This standard is accompanied by a Conformity Assessment mechanism—an evaluation tool to ensure activities align with sustainability benchmarks.

The effectiveness of biosphere reserve management is closely linked to the competence, motivation, and integrity of those responsible for its implementation. In recognition of this, the project has provided technical guidance to reserve management staff, including representatives from cross-sectoral stakeholder groups.

As part of these efforts, a training workshop was organized in May 2024 in Pekanbaru, the provincial capital. The event brought together 53 participants from 28 organizations and addressed key themes such as biodiversity conservation, landscape management, mediation of tenurial conflicts, and the application of environmental standards. Beyond technical capacity-building, the workshop also strengthened inter-agency communication, fostering a collaborative network of practitioners committed to sustainable management.

Taken together, this integration of governance reform, adherence to standards, and investment in human resource development has positioned the Forum as an institution capable of effectively advancing the objectives of the biosphere reserve.

Enhancing community livelihoods

The long-term sustainability of any biosphere reserve fundamentally relies on the support and active participation of local communities. Building on this principle, the ITTO project promoted participatory management by directly engaging local stakeholders, with particular emphasis on women's groups and farmers.

Between October 2023 and February 2024, a series of 15 village dialogues was conducted across eight sub-districts in Bengkalis and Siak. These dialogues involved 375 participants, 43% of whom were women. The sessions enhanced awareness of the reserve's ecological significance while simultaneously identifying livelihood opportunities compatible with sustainability objectives.

Agriculture and fisheries emerged as the primary livelihood sectors during these discussions, with participants expressing strong interest in beekeeping, organic farming, and small-scale processing enterprises. Beyond identifying economic opportunities, the dialogues fostered a sense of ownership among residents and encouraged cooperative approaches to problem-solving, thereby strengthening the social foundations for sustainable biosphere reserve management.
To translate dialogue outcomes into action, the project established four demonstration plots in collaboration with the Riau Regional Community Forestry Communication Forum (FKKM), local non-government organizations, and village leaders:

- Honeybee and floating rice cultivation in Beringin, a village in the buffer zone
- Dryland rice cultivation and a production house in Temiang, a village in the transition zone

The production house functions as a local hub for entrepreneurship, supporting the processing and marketing of community products such as red ginger beverages, Indonesian rice and *kencur* (*Kaempferia galanga*) herbal drink, eco-print batik, and coffee production.

Processing leaves and bark for natural dyes.
© Ministry of Forestry, Indonesia

Inspecting the growth of floating rice cultivation.
© Ministry of Forestry, Indonesia

To strengthen these initiatives, training sessions were conducted in September 2025 with 78 participants, 46% of whom were women. The training addressed four key areas: honeybee cultivation, dryland and organic rice farming, and batik production using natural dyes. Participants acquired practical skills in stamped batik techniques, crop cultivation, pest management, post-harvest handling, and marketing strategies.

In parallel, marketing efforts were enhanced through the establishment of a sales outlet in Pekanbaru by the FKKM Riau Region, enabling locally produced honey to access wider markets. The local government also supported these efforts by placing orders for stamped batik. Furthermore, universities visited the production house to document the activities of women's farmer groups and expressed plans to promote their products more broadly.

Collectively, these interconnected initiatives demonstrate how community-based approaches can advance both economic development and environmental stewardship—two fundamental pillars of biosphere reserve success.

Bee cultivation demonstration plot.
© Ministry of Forestry, Indonesia

Honey from a cultivation demonstration plot for sale.
© Ministry of Forestry, Indonesia

Lessons learned

The field activities of the ITTO project are now complete and have already provided valuable insights into what drives effective biosphere reserve management:

- **Political commitment is essential** – The support of the Riau Governor and provincial authorities was pivotal in re-establishing institutional structures and securing legal recognition for the GSK-BB Forum.
- **Local NGOs act as catalysts** – The FKKM Riau Region played a key role in bridging communication between communities and the government, facilitating training, and ensuring continuity of field activities.
- **Village champions sustain impact** – Empowering local leaders within target villages has been instrumental in maintaining momentum for demonstration plots, mobilizing participation, and sharing results with neighbouring communities.
- **Integration across sectors enhances resilience** – The project's cross-sector approach, involving forestry, agriculture, and tourism, ensures the reserve's management aligns ecological protection with livelihood improvement.

What's next

Phase I of the ITTO project has laid the groundwork for sustainable management of the GSK-BB Biosphere Reserve. By strengthening institutional structures, establishing a planning framework, and empowering local communities, the project has transformed a fragmented management landscape into a more collaborative model.

Building on these achievements, the tentative phase II project will seek to ensure adoption of the planning framework, its effective implementation through the revitalized management forum, and increasing local community support.

Planned activities include launching a public awareness campaign about biosphere protection, formulating a funding mechanism for ongoing management of the reserve, and developing a legal framework for private-sector use of environmental services.

This will help to translate the achievements of the projects into practical, long-term benefits, advancing both the conservation and sustainable use of the forests and other natural resources of the GSK-BB Biosphere Reserve, and the environmental and climate goals of the Indonesian government.

© Jean-Christophe Claudon/ITTO

Tropical timber: a trade under pressure

ITTO's recently published biennial review of global tropical timber markets found signs of stress at many points along global supply chains.

by Frances Maplesden[1] and Jean-Christophe Claudon[2]

In October, ITTO launched the 2023–2024 edition of its Biennial Review and Assessment of the World Timber Situation. Based on information submitted by ITTO member countries, this flagship publication presents the most reliable international statistics available on global production and trade of timber in general, and tropical timber in particular.

As the authors of the assessment, we hope its findings—including the summary presented in this article—enable decision-makers and stakeholders to make informed choices that advance the sustainability of both tropical forest management and the trade in tropical timber products for the years to come.

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[2] ITTO Statistical Assistant

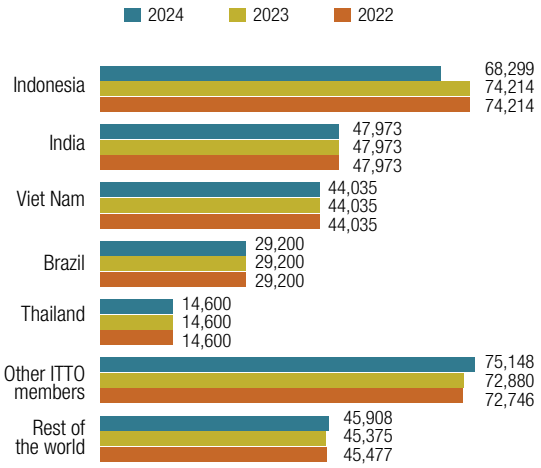
Economic strains

In 2023, global economic recovery from the impacts of the COVID-19 pandemic was slowed by the longer-term effects of the pandemic, the war in Ukraine, weak growth in productivity, and geoeconomic fragmentation. The recovery was also affected by a tightening of financial conditions to counter inflation, the withdrawal of fiscal support to curb high government debt, and persistent weakness in China's property sector, a major market for wood products. There was also considerable divergence in economic growth between regions, with growth strengthening in the United States of America but slowing sharply in the euro area. Disruptions to shipping in the Red Sea from late 2023 further upset supply chains and pushed up transport costs, particularly from Asia to Europe. China's recovery from the pandemic was slower than expected, with the property sector crisis and low consumer confidence constraining economic growth. These developments had significant implications for the global wood products sector, given China's importance in the trade.

Global economic growth in 2024 remained stable but low by historical standards. Growth was dampened by weak domestic demand in China and the EU, heightened policy uncertainty, geopolitical tensions impacting the resilience of global supply chains, and the impacts of natural disasters due to climate change. In China, the prolonged weakness in the real estate sector depressed domestic demand and consumer confidence, while rising trade tensions and new tariffs also dragged on the economy. Declining property sales and real estate investment continued to constrain construction activity with significant impacts on China's wood products imports.

Into 2025, trade policy uncertainty and the emergence of trade barriers (particularly tariff measures), geopolitical shifts, possible supply chain disruptions, and market uncertainties in addition to environmental regulations, are expected to further impact the tropical wood products sector.

Figure 1: Major tropical log producers, 2022–2024
(Volume 1000m³)



Unchanged figures reflect data deficiencies and should be considered tentative

Tropical log production and trade

World production of tropical industrial roundwood ("logs") totalled 328.3 million m³ in 2023 and 328.2 million m³ in 2024, with production in ITTO producer countries accounting for 82% of world production in both years. In 2024 the ITTO Asia-Pacific producers region accounted for most (77%) of the tropical log production in ITTO producer member countries. ITTO members in Latin America had a share of 14%, while Africa accounted for 9% of production. Listing the largest producers first, Indonesia, India, Viet Nam, Brazil, Thailand, and Malaysia accounted for about 83% of ITTO producer countries' total tropical log production in 2023 (Table 1).

The tropical log trade has been on a downward trend since 2018 due to both supply and demand issues, primarily the contraction in China's property sector that has dampened demand for imports, and export restrictions in producer countries that have constrained log availability. In 2023, world imports of tropical logs totalled 10.3 million m³ valued at USD 2 678 million, and in 2024 reached the lowest level in ITTO's statistical records at 10.2 million m³ valued at USD 2 460 million.

China, India, Portugal, Viet Nam and Taiwan P.O.C. were the major importers, with China alone accounting for 61% of world imports by volume in 2023 and 58% in 2024.

Papua New Guinea and Solomon Islands continued to dominate tropical log exports in 2024 (with 2.5 million m³ and 1.6 million m³, respectively) with China the main market. Other major exporters were Brazil, the Republic of the Congo, Cameroon and Malaysia.

Figure 2: Major tropical log exporters, 2022–2024
(Volume 1000m³)

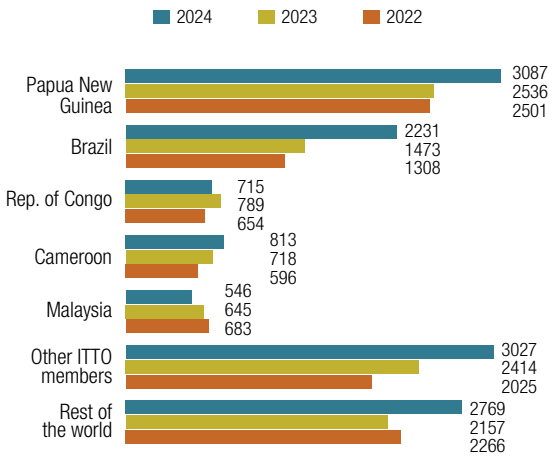
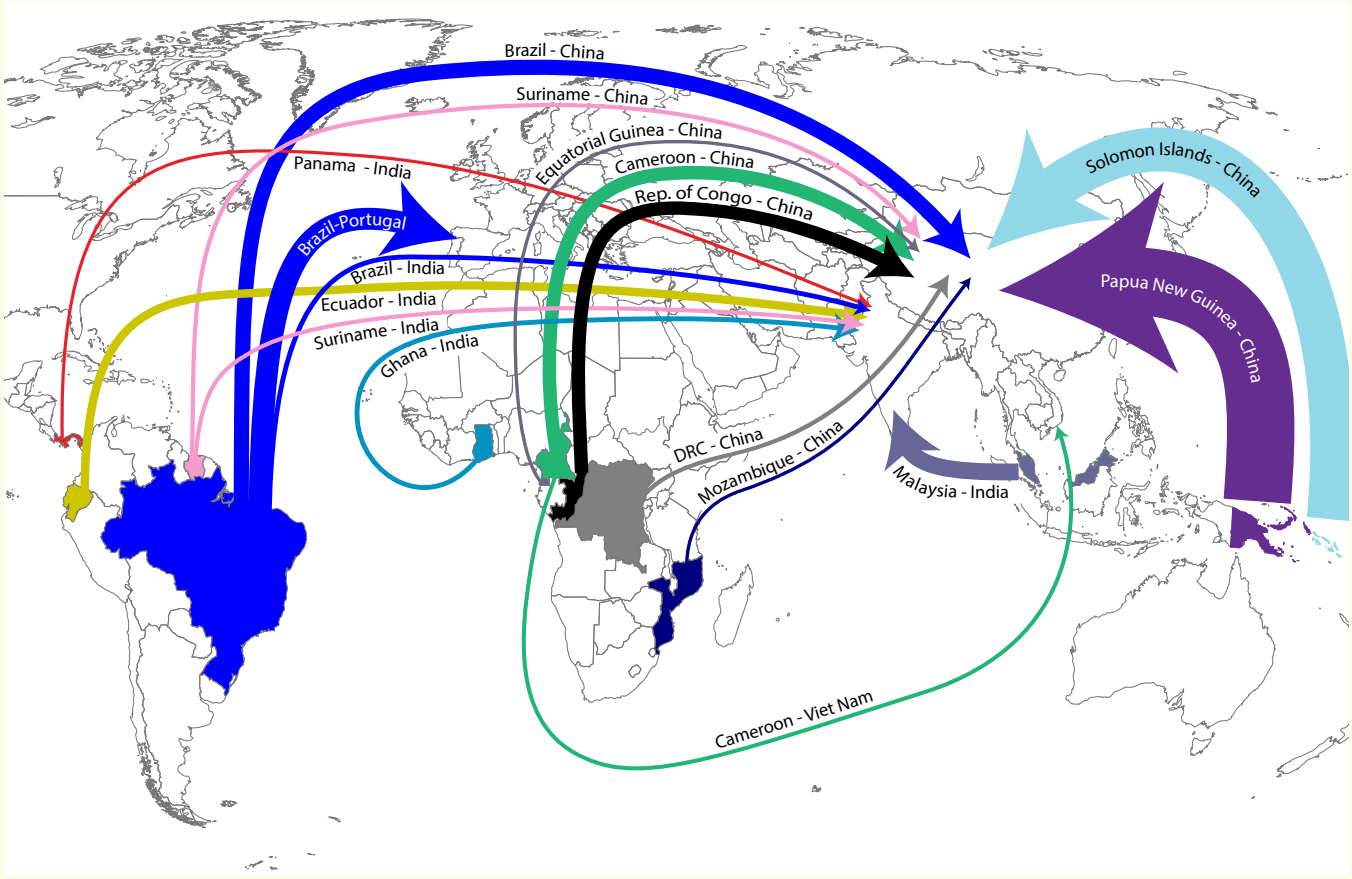


Figure 3: Major trade flows of tropical industrial roundwood, 2023



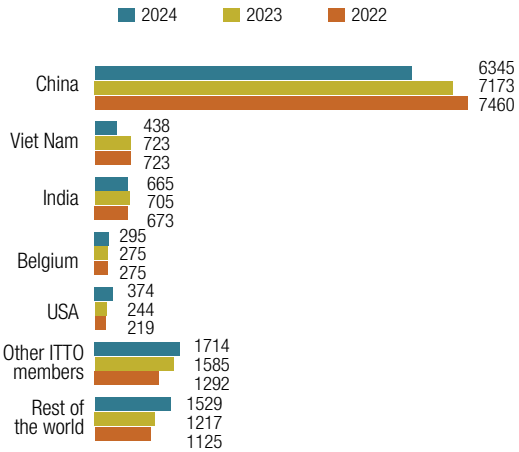
Width scale: Papua New Guina - China = 2.3 million m³
Annual Trade > 100,000 m³

Tropical sawnwood production and trade

Production of tropical sawnwood in ITTO producer member countries accounted for 72% of world tropical sawnwood production in 2023 and totalled 52.6 million m³. Production was expected to remain at about the same level in 2024, at 52.4 million m³. Nearly 79% of production in 2023 in ITTO producer countries was in the ITTO Asia-Pacific region, while ITTO Latin America/Caribbean and ITTO Africa accounted for 11% and 10% respectively. The biggest producers in the Asia-Pacific region include (in descending order by volume) India, Thailand, Viet Nam, Indonesia, and Malaysia.

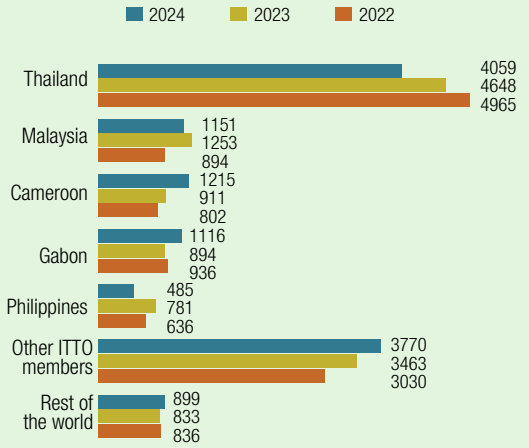
The bulk of the global tropical sawnwood trade (77% of imports and 62% of exports) also lies in the Asia-Pacific region. China, India, and Viet Nam are the major importers, with (in descending order) EU-27 countries (particularly Belgium, France and Italy), the United States, Taiwan P.O.C, the United Kingdom, the Philippines and Thailand also being important markets (Figure 4).

Figure 4: Major tropical sawnwood importers, 2022–2024
(Volume 1000m³)



Thailand is the dominant exporter, followed by Cameroon, Malaysia, Gabon and the Philippines (Figure 5). In 2023, total ITTO imports of tropical sawnwood increased year-on-year by 9%, bucking the downward trend for other primary wood product imports. In that year, ITTO imports totalled 10.7 million m^3, about 90% of the world import volume, and were valued at USD 4 125 million. ITTO imports declined marginally in 2024 to 10.6 million m^3 valued at USD 4 075 million. Tropical sawnwood imports were only a small proportion by volume (about 9%) of total world sawnwood imports (tropical and non-tropical) in 2023.

Figure 5: Major tropical sawnwood exporters, 2022–2024
(Volume 1000m³)



Tropical plywood production and trade

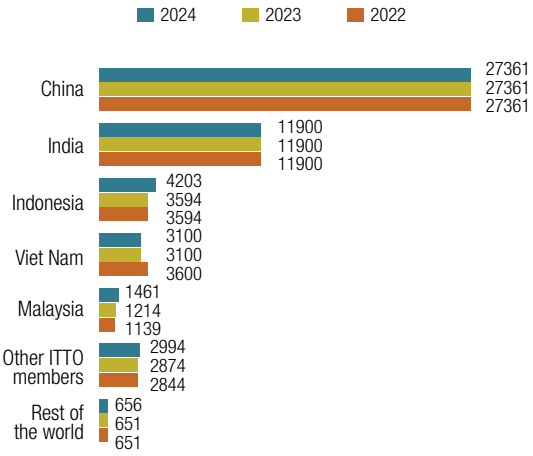
Production of tropical plywood in ITTO member countries (producers and consumers) increased year-on-year between 2016 and 2022, before contracting slightly (by 2%) to 50.0 million m^3 in 2023. Production was expected to increase marginally in 2024 to 50.4 million m^3. ITTO members accounted for nearly 99% of world production.

China, India, Indonesia, Viet Nam and Malaysia dominated tropical plywood production, together accounting for 93% of global output in 2023 (Figure 6). The only other notable tropical plywood producers in 2023 were Cambodia, Ecuador, the Philippines, Côte d'Ivoire, and Brazil, who together accounted for most of the remaining 7%.

About 32% of ITTO producers' plywood production by volume was exported in 2023. Apart from India, which consumes the bulk of its own production, a significant proportion of production was exported from other major producers in the ITTO Asia-Pacific producer region, notably Malaysia (84%), Indonesia (86%) and Viet Nam (69%). Production is therefore more sensitive to market conditions in major importing countries, particularly the United States, Japan, and the Republic of Korea, compared to other tropical primary products. Substitution trends have affected production levels, with tropical plywood continuing to lose market share to temperate and softwood plywood and other lower cost alternative products.

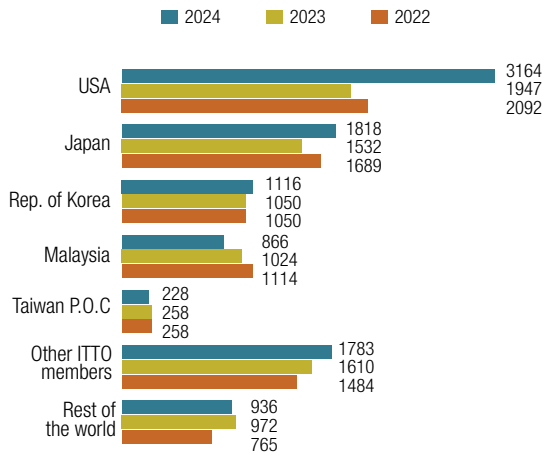
World trade in tropical plywood, which had recovered strongly from the impacts of the pandemic, contracted significantly in 2023, by 15% to 8.4 million m^3, moderating in 2024. The trend largely reflects demand in the United States, which accounted for 24% of world imports in 2024, with housing demand negatively impacted by high inflation and interest rates. Malaysia, which with Indonesia has historically been one of the dominant tropical plywood exporters, has now emerged as a major tropical plywood importer. Malaysia's exports have continued to decline in recent years, dropping to an historic low of 0.97 million m^3 in 2024, due to chronic log supply shortages, rising raw material and manufacturing costs and weak demand in Japan, the major market. In 2024, Malaysia was ITTO's third largest tropical plywood importer after the United States, Japan and the Republic of Korea, with imports amounting to 1.1 million m^3 (Figure 7).

Figure 6: Major tropical plywood producers, 2022-2024
(Volume 1000m³)



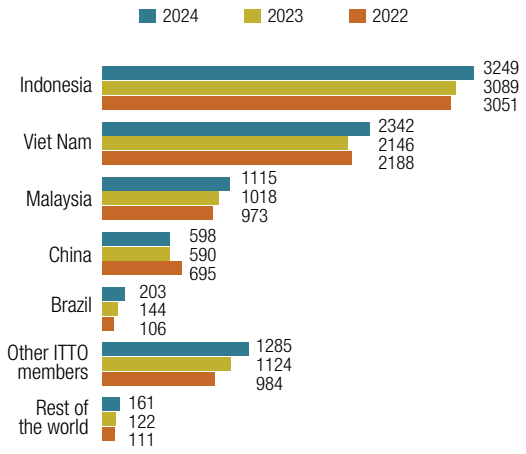
Note: The figure for China does not include Taiwan P.O.C., Hong Kong S.A.R. or Macau S.A.R.

Figure 7: Major tropical plywood importers, 2022–2024
(Volume 1000m³)



Tropical plywood exports from ITTO producer countries increased year-on-year between 2019 and 2021, reaching 7.8 million m³, but declined year-on-year from 2021 to 2024. Exports contracted to 7.1 million m³ in 2023 and 6.9 million m³ in 2024, valued at USD 3 525 million and USD 3 602 million, respectively. ITTO producer countries accounted for 86% of world tropical plywood exports in 2023. Indonesia, Viet Nam, Malaysia and China accounted for 84% of ITTO tropical plywood exports in 2023 and ITTO members accounted for 99% of world exports (Figure 8).

Figure 8: Major tropical plywood exporters, 2022–2024
(Volume 1000m³)



Note: The figure for China does not include Taiwan P.O.C., Hong Kong S.A.R. or Macau S.A.R.

Secondary processed wood products trade

The primary categories of tropical secondary processed wood products (SPWPs) include wooden furniture and parts, builders' woodwork and joinery, mouldings, "other" SPWPs, and cane and bamboo furniture. The value of total ITTO imports of SPWPs–nearly two-thirds of which was wooden furniture and parts–totalled about USD 122.4 billion in 2023 and USD 119.6 billion in 2024, accounting for 90% of world imports. Most of the trade was between consumer countries, which also accounted for most (79%) of the export value. The bulk of import demand has been in advanced economies such as the United States, EU countries, the United Kingdom, and Japan.

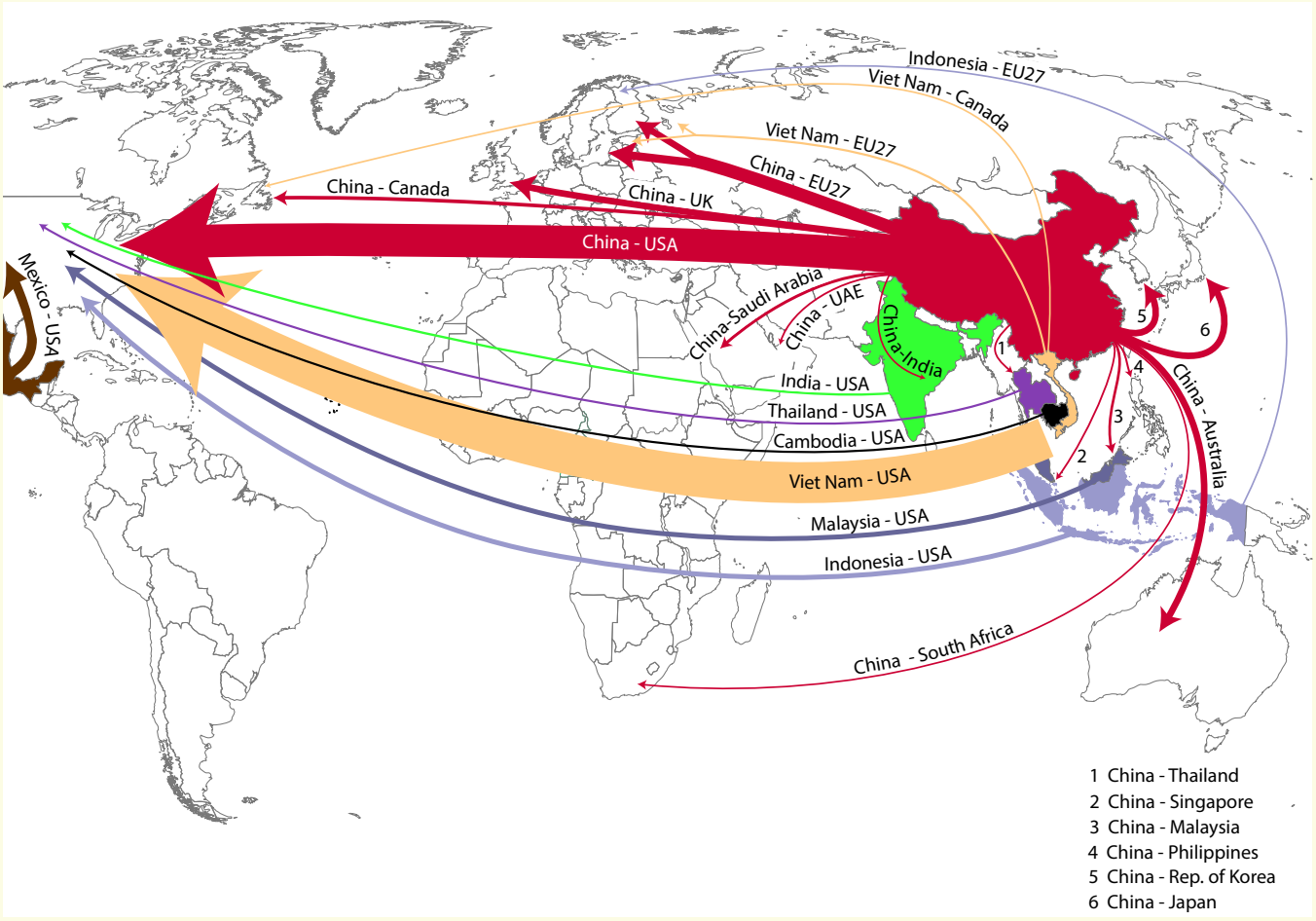
The value of ITTO imports of SPWPs had soared between 2020 and 2022, in response to pent-up demand in major consumer markets, reaching a peak of USD 145.4 billion in 2022 before declining by 16% in 2023. The United States accounted for 25% of world imports in 2023, amounting to USD 34.1 billion, 25% less than the previous year. EU-27 countries imported SPWPs valued at USD 49.8 billion in 2023, 9% less than the previous year. Imports into the United Kingdom and Japan were also down significantly.

Total ITTO exports of SPWPs amounted to USD 133.7 billion in 2023 and 128.8 billion in 2024, marking annual declines of 13% and 4%, respectively. ITTO consumer countries exported SPWPs worth USD 105.4 billion in 2023, 79% of the ITTO total. China has been the world's largest SPWP exporter since 2013, with exports totalling USD 35.8 billion in 2023, 9% less than the previous year, and accounting for 27% of the ITTO total.

ITTO producers accounted for 23% of ITTO's SPWP exports in 2024. Producer exports increased year-on-year from 2017 to 2022, reaching a peak of 37.9 billion before contracting (by 26%) to USD 28.2 billion in 2023 and increasing slightly in 2024 to USD 29.4 billion. Asia-Pacific was still the dominant ITTO producer region, accounting for about 82% of ITTO producers' SPWP exports in 2024, 49% of which was from Viet Nam and valued at USD 14.5 billion. Indonesia and Malaysia's exports amounted to USD 2.9 billion and USD 2.8 billion respectively in 2024 with the other major ITTO producer exporters of SPWPs in 2024 being Mexico, Brazil, India, the Philippines, and Thailand.

World trade of wooden furniture had rebounded strongly from the impacts of the pandemic, reaching a peak of USD 104.2 billion in 2022, up 39% on the export value in 2020. However, growth has slowed amid global economic uncertainties, supply chain and logistical constraints, inflationary pressures impacting manufacturing costs and consumer demand, and currency devaluations against the US dollar. In 2023, ITTO members' exports of wooden furniture were down to USD 87.0 billion, and contracted further in 2024 to USD 85 billion. ITTO member countries accounted for 94% of world exports of wooden furniture and parts in 2024. China accounted for 27%, and producer countries for 26%, of ITTO exports (Figure 9).

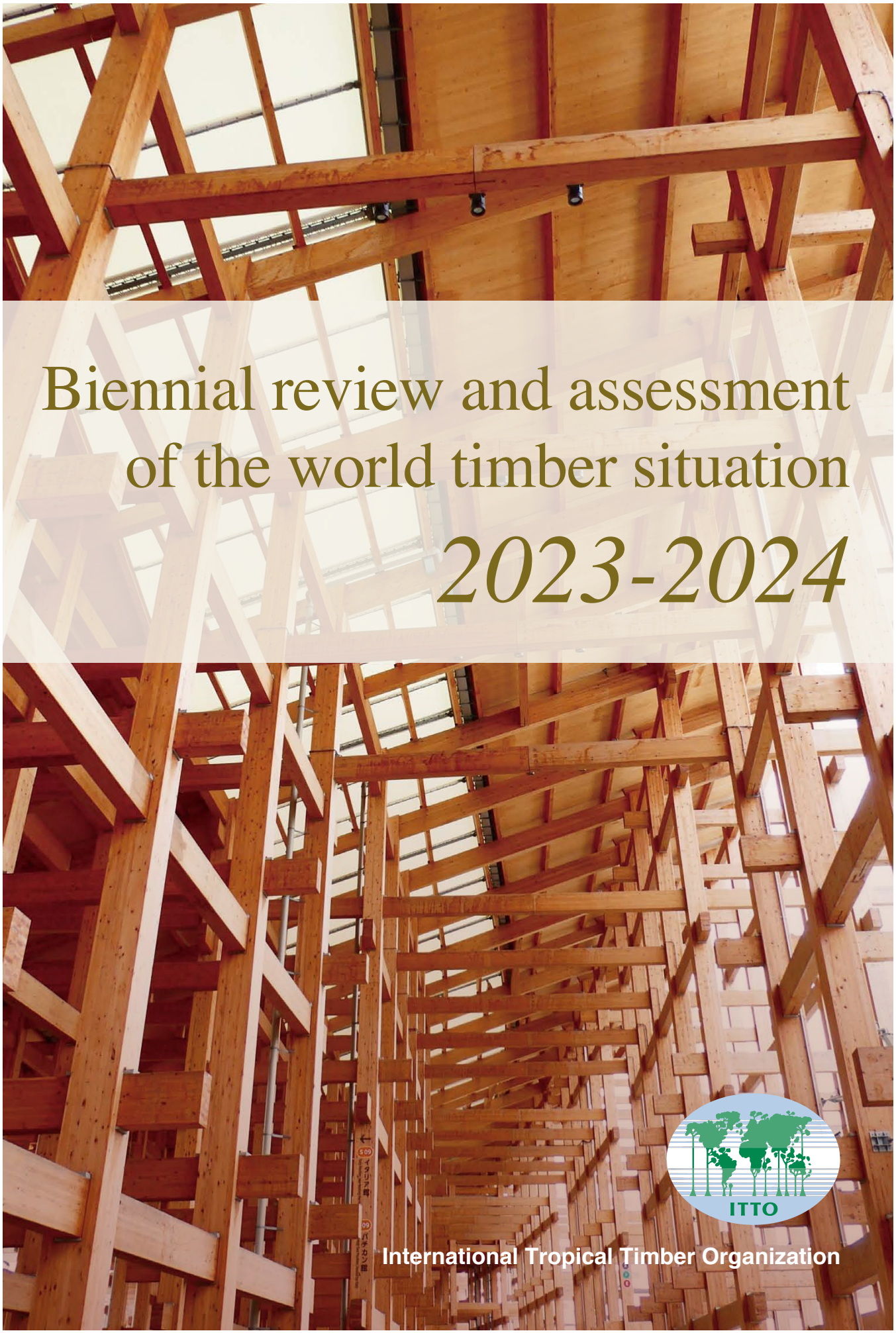
Figure 9: Major trade flows of wooden furniture, 2023



Width scale: Viet Nam - USA = 2.3 million m³
Annual Trade > USD 300 million

Viet Nam, the dominant exporter of wooden furniture among tropical producer countries, accounted for 16% of ITTO exports by value in 2024. In 2023, exports had contracted to USD 11.2 billion, down 23% from a peak in 2022, but rebounded in 2024 to USD 13.3 billion. The trend reflects demand constraints in the United States, which accounted for 82% of Viet Nam's exports by value in 2024. With the risks escalating for tropical exporters to US and EU markets, an expansion of wooden furniture and other wood product exports to alternative markets can be expected although this is not yet evident in ITTO trade statistics.

The Biennial Review and Assessment of the World Timber Situation 2023–2024, can be found along with previous editions at www.itto.int/biennal_review/

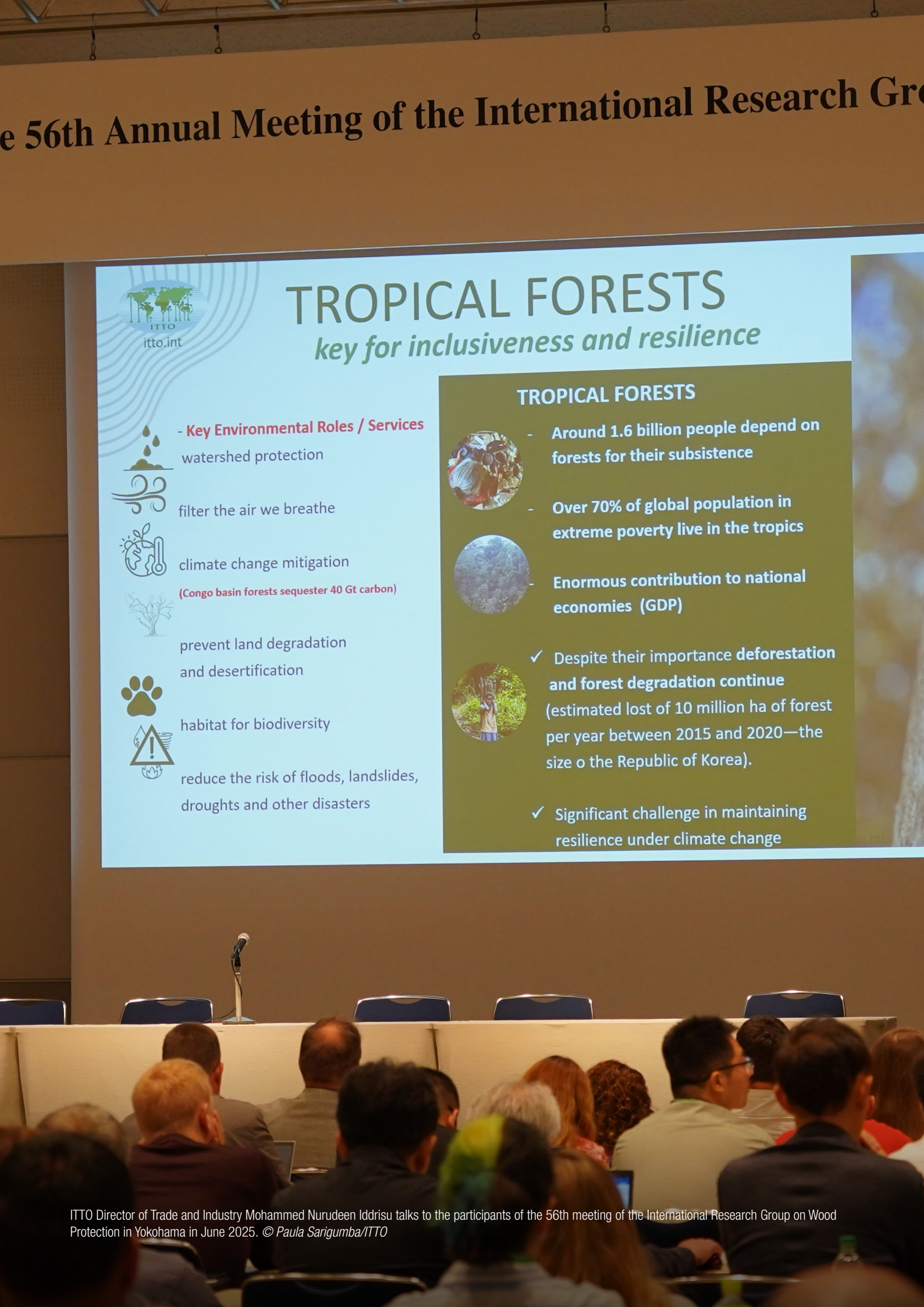


Biennial review and assessment of the world timber situation

2023-2024

ITTO

International Tropical Timber Organization



ITTO Director of Trade and Industry Mohammed Nurudeen Iddrisu talks to the participants of the 56th meeting of the International Research Group on Wood Protection in Yokohama in June 2025. *© Paula Sarigumba/ITTO*

Lesser-used timber species: A pathway through global trade turbulence

The ITTO Director of Trade and Industry promotes the expanded use and deeper exploration of the untapped potential of lesser-used tropical timber species.

by Mohammed Nurudeen Iddrisu,
ITTO Director of Trade and Industry (ti@itto.int)

The world of tropical timber is undergoing some turbulent times. As global trade disturbances intensify—through shifting regulations, protectionist policies, and economic uncertainty—our sector faces both daunting challenges and remarkable opportunities.

I have spent much of my career working with tropical timber producers, importers, processors, policymakers, and researchers, building bridges between industry, government, and international organizations to

strengthen sustainable forest management and trade. With over three decades of experience spanning Ghana, North America, the UK, Europe and now Japan, I have combined academic research and professional best practice to advance forest governance, improve timber industry development, and promote responsible forest products utilization and marketing.

In these roles, I have learned the value of lesser-known timber species in the sector. On a recent occasion, speaking at the IRG56 conference in Yokohama on 23 June 2025, I conveyed the message that we cannot afford to ignore the untapped potential of lesser-known tropical timber species and the critical role of wood protection. These are not niche topics—they are keys to long-term sustainability of the tropical forests, sustaining the livelihoods of millions, strengthening national economies, and safeguarding our forests in the face of climate change and potential forest degradation.

Why tropical forests matter more than ever

Tropical forests cover about 1.83 billion hectares—around 45% of all forests on Earth—and provide livelihoods to around 1.65 billion people. They store immense volumes of carbon, sequester carbon dioxide, shelter unmatched biodiversity, and serve as a buffer against the worst impacts of climate change.

Yet we are still losing approximately 8 million hectares of tropical forest each year, with the large increase in 2024 fueled by forest fires. This is a stark reminder that sustainable forest management (SFM) is not optional—it is essential.

The market for tropical timber has grown substantially, driven not only by construction in developed nations but also by the emergence of China and the rapid growth of the middle class in developing countries. But the real story is not just about volume—it's about value.

Adding value, creating prosperity

Countries like Papua New Guinea and the Solomon Islands export large volumes of tropical logs, yet it is nations like Viet Nam and Malaysia that show us the power of value addition. Viet Nam's multi-billion-dollar processing industry transforms raw logs into finished products that fetch higher prices, create jobs, and generate revenue while Malaysia has focused on SFM and created opportunities for its processing sectors.

When you add value, you export less volume but earn more. That is the future to be pursued across the tropics.

Navigating regulatory and geopolitical shifts

The tropical timber trade is also shaped—sometimes constrained—by regulations in major markets. The European Union's FLEGT licensing system was a milestone for legality assurance, with Indonesia issuing the first license in 2016. But for countries like Ghana, years of work towards securing such licenses are now complicated by the new EU Deforestation Regulation (EUDR), which shifts the compliance requirements and poses fresh challenges, especially for African producers. That said, Ghana has now reached all the European Union's

FLEGT requirements and recently issued its first FLEGT licence, the first country in Africa and the second globally after Indonesia to do so. This milestone reached still does not grant any 'green lane' to FLEGT licensed timber, making other VPAs countries wonder if the years of work towards FLEGT are all worth it.

Add to that the broader global picture: geopolitical tensions, protectionist tariffs, and a troubled Chinese housing market; the latter especially worrying for exporters, since China remains the largest importer of tropical hardwood.

In such an environment, ITTO's role is to help our members adapt and be informed. We develop policy guidelines, fund field projects, compile and share trade data, and build capacity to support SFM and sustainable tropical timber industries. We have implemented over 1,200 projects and activities that turn policy into practice. We provide a market intelligence service every two weeks through our Tropical Timber Market Report.

The untapped potential of lesser-used species

Here is where I see enormous promise: among the thousands of tropical tree species, only a fraction are traded internationally. Many lesser-known species have comparable properties to commercial favourites. With proper research, processing, and market promotion, they could diversify production and consumption, relieve pressure on overharvested species, and open new market opportunities.

This is where collaboration with research bodies like the International Research Group on Wood Protection (IRG-WP) becomes vital. Their expertise in understanding wood characteristics, developing protective treatments, and extending wood's service life can ensure that these species are not only harvested sustainably but also perform reliably in the marketplace.

The road ahead: science and partnerships

At ITTO, we value open collaboration that bridges science with real-world outcomes. Partnerships between research networks and trade-focused organizations are essential if we are to meet rising demand without sacrificing the health of tropical forests.

The future of tropical timber lies not just in defending existing markets, but in innovating—embracing lesser-known species, improving wood protection, and ensuring that trade and conservation work hand in hand.

> **Sustainable forest management is not optional– it is essential**

We can maintain timber flows without deforestation. We can grow economies while conserving forests. But only if we commit to smarter use of our resources—starting with the species and the innovative technologies we've overlooked for far too long.

Dr Mohammed Nurudeen Iddrisu is a professional forester and forest geneticist, with over thirty years (30) of practical experience in the forestry sector. He recently joined the ITTO as Director, Trade and Industry. Prior to joining the ITTO, he was with the Ghana Forestry Commission (GFC) for 20 years where he held several leadership positions, including Executive Director of the Timber Industry Development Division (TIDD), Director of Operations (TIDD) and also served as Head of GFC London Office from 2010–2017.

Dr Iddrisu has vast international experience with diverse professional practices spanning from academic research, temperate and tropical forest management, project management, forest governance and timber trade, forest products utilization and marketing, diplomacy and policy across from his native Ghana, North America, UK, Europe and now Japan. He has a master's degree in forest resource management from the University of Pinar del Río, Cuba, and a Doctorate in Forest Genetics from the University of British Columbia, Vancouver, Canada.

He was Chair of the International Tropical Timber Council in 2023 and has also served as board member of PEFC International from 2017–2023.

Timber processing plant in Viet Nam.
© ITTO

Market trends

Only an upturn in Chinese domestic consumption can drive a recovery of tropical timber imports into this key global market

Compiled from the ITTO Tropical Timber Market Report[1] and other sources by Mike Adams (mis@itto.int)

In 1998, the Chinese government decided to stop logging in its natural forests, leading to a dependency on imports of temperate and tropical timber. Most of China's imports of tropical timber (predominately logs and sawnwood) are processed and sold into the domestic market and/or exported internationally. So, when domestic consumer sentiment and purchasing power are strong, they drive demand and tropical timber imports rise.

China's economy continues to face headwinds. The challenges in early 2025 included slow growth, weak domestic consumption, deflationary pressures, a continuing property market downturn, antidumping penalties imposed by several countries and the negative impact of US tariffs. Longer-term challenges include an aging population, youth unemployment and significant corporate and local government debt.
The real-estate sector downturn is at the core of the decline in timber imports. China's National Bureau of Statistics has reported that between January and June 2025 investment in real estate development decreased 11% year on year. Investment in residential buildings was down by 10%.

[1] www.itto.int/market_information_service/

In the past, rapid urbanization, policy-induced artificial land scarcity, the dependence of local governments on land sales for revenue, and expectations of future growth caused real-estate prices to soar. At its 2020–21 peak, the real estate sector contributed 25% of total GDP and 38% of government revenue. But it is now blighted by weak demand, falling construction activity and severe overcapacity.

The impact of these issues has undermined consumer demand which is in turn behind the marked decline in imports of logs and sawnwood, especially tropical timber.

Decline in log imports

According to China Customs, the country's log imports in the first half of 2025 totalled 16.79 million cubic metres and were valued at USD 2.695 billion, down 11% in volume and 18% in value over the same period of 2024 (Table 1). Of total log imports, softwood log imports fell 7% to 12.34 million cubic metres, accounting for 73% of the national total and up 3 percentage points from the same period of 2024.

Hardwood log imports dropped 20% to 4.45 million cubic metres, accounting for 27% of the national total. Of total hardwood log imports, tropical log imports were 2.31 million cubic metres, valued at USD 552 million, down 22% in volume and 28% in value from the same period of 2024. This accounted for 14% of the national total import volume, down 2 percentage points over the same period of 2024.

Table 1: Log imports into China by volume in the first half of 2025

	mil. cu. m	YoY change
Softwood logs	12.34	-7%
All hardwood logs	4.45	-20%
(Tropical logs)	(2.31)	(-22%)
Total	**16.79**	**-11%**

Data source: China Customs

China's tropical log imports came mainly from Papua New Guinea (38% of the total), Solomon Islands (28%), South Africa (7%), Cameroon (6%) and the Republic of the Congo (5%) (Table 2). Together, these five countries supplied 84% of China's total tropical log imports in the period.

Still, tropical log imports from each of these countries fell by between 18% and 35% in the first half of 2025. In contrast, imports from the Central Africa Republic and Ecuador rose.

Table 2: Sources of tropical hardwood log imports into China in the first half of 2025

	000' cu. m	YoY change
Papua New Guinea	880	-18%
Solomon Islands	644	-30%
South Africa	152	-35%
Cameroon	130	-22%
Republic of the Congo	125	-32%
Suriname	68	-18%
Democratic Republic of the Congo	65	-11%
Central African Republic	62	49%
Bolivia	35	-41%
Ecuador	29	5%
Total	**2311**	**-22%**

Data source: China Customs

Sawnwood imports also drop

In the first half of 2025, China's sawnwood imports totalled 12.15 million cubic metres, valued at USD 3.117 billion, down 13% in both volume and value compared to the first half of 2024 (Table 3). Of total sawnwood imports, sawn softwood imports fell 17% to 7.39 million cubic metres, while sawn hardwood imports declined 6% to 4.77 million cubic metres. Among hardwood imports, tropical sawnwood imports were 3.42 million cubic metres, valued at USD 951 million, down 7% in volume and 12% in value, and accounted for about 28% of total sawnwood imports.

Table 3: Sawnwood imports into China by volume in the first half of 2025

	mil. cu. m	YoY change
Sawn softwood	7.39	-17%
All sawn hardwood	4.77	-6%
(Tropical sawnwood)	(3.42)	(-7%)
Total	**12.15**	**-13%**

Data source: China Customs

The decline in China's overall sawnwood imports has been attributed mainly to the slump in activity in the real estate and construction sectors. A seasonal slowdown caused by a longer-than-usual rainy season in many provinces of China also slowed overall demand for timber.

Regarding tropical sawnwood, Thailand has been the largest supplier to China for many years. However, imports from Thailand in the first half of 2025 dropped 11% by volume to 2.216 million cubic metres, valued at USD 571 million (Table 4). Imports of tropical sawnwood from Gabon, Myanmar, Malaysia, Cameroon and Indonesia also fell in the period. In contrast, imports from the Philippines, Viet Nam, Papua New Guinea and the Republic of the Congo increased.

Table 4: Sources of tropical sawnwood imports into China in the first half of 2025

	000s cu. m	YoY change
Thailand	2,216	-11%
Philippines	375	21%
Gabon	280	-31%
Viet Nam	119	52%
Myanmar	94	-36%
Papua New Guinea	84	343%
Malaysia	48	-26%
Cameroon	35	-50%
Republic of the Congo	32	9%
Indonesia	24	-42%
Total	**3,421**	**-7%**

Data source: China Customs

Boosting consumption

China is pivoting its economic strategy to boosting domestic demand, moving away from an export-led growth model due to trade tensions and slowing global demand.[2] This shift is being supported by government stimulus efforts, including consumer trade-in programmes and tariff adjustments. As US trade policies bite, many countries are looking to diversify markets, including through boosting domestic consumption, and the measures being taken in China may provide a blueprint for others grappling with similar issues.

A Chinese government action plan to boost domestic consumption includes several measures to support construction and the supply of affordable housing.[3] The government has also indicated greater support will be provided to the real estate sector at the macro level. The purpose is to stabilize the property market and boost household consumption, both of which could have positive knock-on effects on demand for timber. The notable measures include:

- Efforts to transform urban villages and dilapidated houses to boost housing demand.
- Allowing special bonds to support the purchase of commercial housing by urban governments for use as affordable housing.
- Tax policies to promote the steady and sound development of the real estate market.
- Lower interest rates on housing provident fund loans.
- Greater scope of the use of the housing provident fund to support contributors applying for individual housing loans.

[2] https://english.www.gov.cn/atts/stream/files/67d179afc6d0c78809900055
[3] www.gov.cn/gongbao/2025/issue_11946/202503/content_7015860.html

Lower wood product tariffs

Boosting domestic consumption is also a stated goal of adjustments in import tariffs.[4] In 2025, tariffs at lower than most-favoured-nation rates have been applied to hundreds of commodities, including wood products such as veneer, wood flooring, fibreboard, plywood, wooden doors, wood formwork, wooden pallets, barrels and wooden tools, cork and cork products, and bamboo and rattan products. China has said it will also continue to allow tariff free imports in 2025 from the 43 least developed countries with which it has diplomatic relations. Tariffs on logs and sawnwood have been eliminated.

Some measures may already be having an effect. For example, the consumer goods trade-in programme supports retail sales, which grew by nearly 5% in the first four months of 2025, faster than the 3% rate recorded in the same period in 2024. Sales of durable goods eligible for subsidies such as household appliances and furniture posted double-digit growth in the same period. Job market measures, including tax relief and employment subsidies, have helped to ease some employment pressures.

Dim prospects

However, despite some bright spots, China's GDP growth is projected to moderate to 4.5% in 2025 and slow to 4% in 2026, according to the World Bank.[5] Front-loading exports lifted the economy in the first half of 2025 but export growth is expected to decelerate, and increased uncertainty will temper manufacturing investment and labour demand going forward.

What remains to drive the economy is fiscal policy. A significant portion of fiscal support has already been allocated to infrastructure investment, while some social benefits and consumer subsidies have been expanded to boost household consumption. Policy support for the property sector is expected to provide a modest boost to housing demand. Beyond short-term stimuli, a sustained improvement in household consumption will require more ambitious reforms, the World Bank said.

Meanwhile, China's real estate market is expected to remain in its current slump through 2026, according to a recent report by S&P Global Ratings.[6] With sales projected to be 9 trillion yuan or less this year, China's property market will have halved in just four years. Against this backdrop China's timber imports look set to decline further in 2026.

[4] http://gss.mof.gov.cn/gzdt/zhengcejiedu/202412/t20241227_3950705.htm and http://gss.mof.gov.cn/gzdt/zhengcejiedu/202412/t20241227_3950705.htm
[5] https://thedocs.worldbank.org/en/doc/8ae5ce818673952a85f-ee1ee57c3e933-0070012025/original/CEU-June-2025-EN.pdf
[6] www.spglobal.com/ratings/en/regulatory/article/china-property-watch-the-chilling-effects-of-polarization-s101647911

Norway, Indonesia, Brazil and others pledge billions to a bold new plan to protect tropical forests

The Brazil-led Tropical Forests Forever Facility (TFFF), a proposed USD 125 billion mechanism to pay developing countries for halting deforestation, gained momentum at the COP30 climate conference, according to CBC. Initial pledges include USD 3 billion from Norway, USD 1 billion each from Brazil and Indonesia, and USD 500 million from France. The fund aims to raise an additional USD 10 billion in its first year.

The effort follows record tropical forest loss in 2024. Under the proposal, the TFFF would invest in a diversified asset portfolio, including bonds issued by forested countries for clean energy and related projects. Returns from these investments would help finance performance-based payments to countries based on the forest area they conserve.

Read more: www.cbc.ca/news/science/tropical-forest-fund-cop30-brazil-9.6971548

What Brazil's soy moratorium fight means and what happens next

A move to suspend Brazil's moratorium on purchasing soy from Amazon lands deforested after 2008 has raised concerns that years of progress in curbing deforestation could be undone, reports the Associated Press. Brazil's competition regulator, CADE, issued a preventive suspension order in August 2025, but a federal judge has paused the decision pending review, keeping the moratorium in place for now.

Established in 2006 and renewed in 2016, the moratorium is a voluntary agreement among major soy traders and is widely regarded as one of the most effective supply-chain measures for reducing deforestation. CADE has launched an administrative proceeding against signatories and traders, alleging potential cartel-like conduct under antitrust law.

Read more: https://apnews.com/article/brazil-deforestation-soy-moratorium-1bf704a344838f875f6278bf25cc1195

Why tropical dry forests are collapsing: The forces driving a silent crisis

Tropical dry forests are disappearing at rates that may outpace losses in humid forests, according to the second installment of a *Forests News* series. The decline is driven by extensive land conversion combined with intensifying climate pressures.

A referenced 2022 study found that more than 71 million hectares of tropical dry forest, more than twice the size of Germany, were lost between 2000 and 2020. Climate change is accelerating the collapse, acting as a threat multiplier that reduces forest resilience and heightens vulnerability to other pressures.

Read more: https://www.forestsnews.org/93791/tropical-dry-forests-degradation-part2?fnl=en&utm_campaign=CIFOR_ICRAF_Newsletter&utm_medium=email&utm_source=2025_MC_Newsletter_September

Mangroves store 'blue carbon' but they're disappearing fast

Mangrove ecosystems rich in blue carbon offer vital natural protection for climate-vulnerable countries such as the Philippines, yet many struggle to access the financing needed to safeguard these defenses, says a *Context* explainer.

Blue carbon refers to carbon captured and stored by mangroves and other coastal and marine ecosystems. An estimated 340 000–980 000 hectares of these ecosystems are lost each year, according to the Blue Carbon Initiative. Protecting and restoring them could help countries strengthen climate resilience, meet emissions targets, and advance broader development goals.

Read more: https://www.context.news/nature/mangroves-store-blue-carbon-but-theyre-disappearing-fast

Ebony and ivory: why elephants and forests rise and fall together in the Congo Basin

A steep drop in forest elephant populations in Central Africa is reshaping rainforest ecosystems, according to a *Conversation* commentary. In the Congo Basin, Africa's largest tropical forest, elephants act as key "gardeners," dispersing seeds and maintaining plant diversity.

Research in Cameroon found nearly 70% fewer West African ebony trees in areas where elephants have vanished. The findings suggest ebony may be unable to regenerate naturally without elephant dispersal, underscoring how essential plant–animal interactions are to healthy forest functioning.

Read more: https://theconversation.com/ebony-and-ivory-why-elephants-and-forests-rise-and-fall-together-in-the-congo-basin-264500

'Food forests are everything': creating edible landscapes helps nature thrive in Afro-descendant lands

For generations, Afro-descendant communities across Latin America have cultivated "edible landscapes", agroforestry systems embedded within natural tropical forests, and have long argued that their stewardship is essential for biodiversity protection and deserving of legal recognition.

New research reported by *The Guardian* quantifies this contribution: more than half of formally recognized Afro-descendant territories analyzed overlap with the world's top 5% most biodiverse areas. The study also found that deforestation rates in these lands are 29% lower than in protected areas, highlighting their pivotal role in conserving forests, contributing to biodiversity, and storing carbon.

Read more: https://www.theguardian.com/environment/2025/sep/23/environment-biodiversity-afro-descendants-latin-america-food-forests-aoe

Harimau Sumatra *(Panthera tigris sumatrae)*
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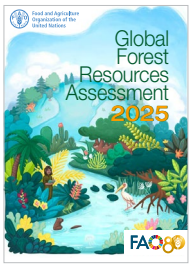
Recent editions

United Nations Environment Programme. 2025. *High-risk forests, high-value returns: A co-benefits assessment for decision-makers.* Nairobi, UNEP.

ISBN 978-92-807-4234-3

Available at: wedocs.unep.org/20.500.11822/48717

A new UNEP report identifies about 391 million hectares of tropical "high-risk forests", areas facing elevated deforestation pressure yet delivering essential benefits for people and the planet. The report finds that conserving these forests can prevent large-scale carbon emissions while providing critical co-benefits such as water and soil regulation, rainfall recycling, pollination, food security, and local livelihoods. Given their combined ecological and social value, the report positions high-risk forests as a strategic priority for global climate mitigation efforts.



FAO. 2025. *Global Forest Resources Assessment 2025.* Rome, FAO.

ISBN 978-92-5-140082-1

Available at: openknowledge.fao.org/items/090d2fbb-32a6-412b-a3b8-1ce5c5905df2

FAO's Global Forest Resources Assessment 2025 provides a comprehensive review of forest status and trends from 1990–2025, drawing on input from hundreds of experts worldwide. With forests central to achieving the 2030 Agenda for Sustainable Development, the report offers essential data for designing policies, tracking progress, and ensuring the long-term provision of forest goods and services. It remains a key reference for understanding long-term global forest trends and their links to international goals.

FAO. 2025. *What are countries doing for their forest biodiversity? An analysis of national biodiversity strategies and action plans submitted by Parties to the Convention on Biological Diversity since adoption of the Kunming-Montreal Global Biodiversity Framework.* Rome, FAO.

Available at: openknowledge.fao.org/items/74fcf657-fc83-4977-bab2-4e41075442df

This FAO brief analyzes the national biodiversity strategies and action plans submitted since the adoption of the Kunming–Montreal Global Biodiversity Framework (KMGBF). To offer a fuller picture of forest-related biodiversity priorities, the analysis also reviews 129 national targets under the KMGBF, including those from countries in the Amazon, Congo, and Borneo–Mekong–Southeast Asia basins. The brief provides insight into how countries are aligning national commitments with global biodiversity objectives.

***Forest Declaration Assessment Partners. 2025.* Forest Declaration Assessment 2025. Climate Focus.**

Available at: forestdeclaration.org/resources/forest-declaration-assessment-2025

The 2025 Forest Declaration Assessment offers a consolidated view of global progress toward the 2030 forest goals, identifying where momentum is building and where it is falling short. While restoration efforts are increasing, forest loss remains 63% above the trajectory required to halt deforestation by 2030. The report also highlights misaligned financial flows and lagging corporate and financial sector commitments as major barriers to progress.

Esquivel-Muelbert, A., Banbury Morgan, R., Brienen, R. et al. 2025. *Increasing tree size across Amazonia.* Nat. Plants

Available at: www.nature.com/articles/s41477-025-02097-4[a]

A new Nature study analyzing 30 years of tree data from 188 mature Amazon forest plots reveals notable structural shifts. Researchers found that trees have become larger overall, with increases in both the number and size of large trees. The findings suggest a resource-driven boost favoring larger trees and a decline in the competitive pressures that once suppressed growth among smaller trees.

United Nations Environment Programme. 2025. State of Finance for Forests 2025: *Unlock. Unleash. Realizing forest potential requires tripling investments in forests by 2030.* Nairobi, UNEP.

ISBN 978-92-807-4233-6

Available at: www.unep.org/resources/report/state-finance-forests-2025

A UNEP report on global forest finance compares 2023 public and private investment flows with what is required for forests to realize their potential for climate, biodiversity, and land-degradation goals. The analysis finds significant underfunding, reporting that annual forest finance must rise from USD 84 billion in 2023 to USD 300 billion by 2030 and USD 498 billion by 2050, with heightened private-sector contributions highlighted as a key opportunity.

Events

20–23 January 2026
Regional capacity-building workshop on forest financing in the Asia-Pacific region
Bangkok, Thailand
www.un.org/esa/forests/events/regional-capacity-building-workshop-on-forest-financing-in-the-asia-pacific-region/index.html

28–30 January 2026
International Conference on Population and Conservation Genetics
Coimbatore, India
icpcgindia2026.in/

3–6 February 2026
Euro Bois
Lyon, France
https://www.eurobois-events.com/en

3–8 February 2026
Plenary of the Intergovernmental Science-Policy Platform on Biodiversity and Ecosystem Services - Twelfth session
Manchester, United Kingdom
www.ipbes.net/events/ipbes-12-plenary

12–14 February 2026
FOR WOOD Prague
Prague, Czech Republic
www.tradefairdates.com/FOR-WOOD-M4779/Prague.html

15–18 February 2026
Treescapes 2026
New Delhi, India
www.cifor-icraf.org/event/treescapes-2026/

23–25 February 2026
COLI Summit: Country-Led Initiative on Advancing Sustainable Forest-based Bioeconomy Approaches
Vienna, Austria
www.bmluk.gv.at/en/coli.html

17–19 March 2026
IWPA's 70th World of Wood Convention
Colorado Springs, Colorado
https://www.iwpawood.org/events/EventDetails.aspx?id=2009874&group=

21–23 April 2026
Dubai Wood Show
Dubai, United Arab Emirates
www.woodshowglobal.com/dubai/event-information

4–8 May 2026
ForestSAT 2026
Gainesville, United States of America
www.iufro.org/events/forestsat-2026

11–15 May 2026
The 21st Session of United Nations Forum on Forests (UNFF)
New York City, United States of America
www.un.org/esa/forests/events/the-21st-session-of-united-nations-forum-on-forests/index.html

2–4 June 2026
Carrefour International du Bois
Nantes, France
www.timbershow.com/

23–25 June 2026
ForestCore
Medellín, Colombia
www.ingeobosque.org/forestcore

14–15 July 2026
Second Global Nature Positive Summit
Kumamoto, Japan
www.naturepositive.org/news/latest-news/second-global-nature-positive-summit-announced/

15–18 September 2026
Wind and Trees 2026
Matsumoto, Japan
windandtrees2026.wordpress.com/

19–30 October 2026
17th meeting of the Conference of the Parties to the Convention on Biological Diversity
Yerevan, Armenia
www.cbd.int/

19 March–26 September 2027
GREEN x EXPO 2027
Yokohama, Japan
expo2027yokohama.or.jp/en/

ITTO meetings

09–14 November 2026
62nd session of the International Tropical Timber Council
Yokohama, Japan

www.itto.int/council_committees

Note that all events are subject to change or cancellation. Please check the contact addresses for the latest information.

ITTO provides this list of international events as a public service and is not responsible for changes in date or venue or for other errors.

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