



# **General Situation Of Imported Hardwood In China**

**CTWPDA**

**Hardwood Branch**

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# DIRECTORY

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American Hardwood Overview

A thick green horizontal line extends from the left edge of the slide to a green circle. The number '01' is centered inside the circle.

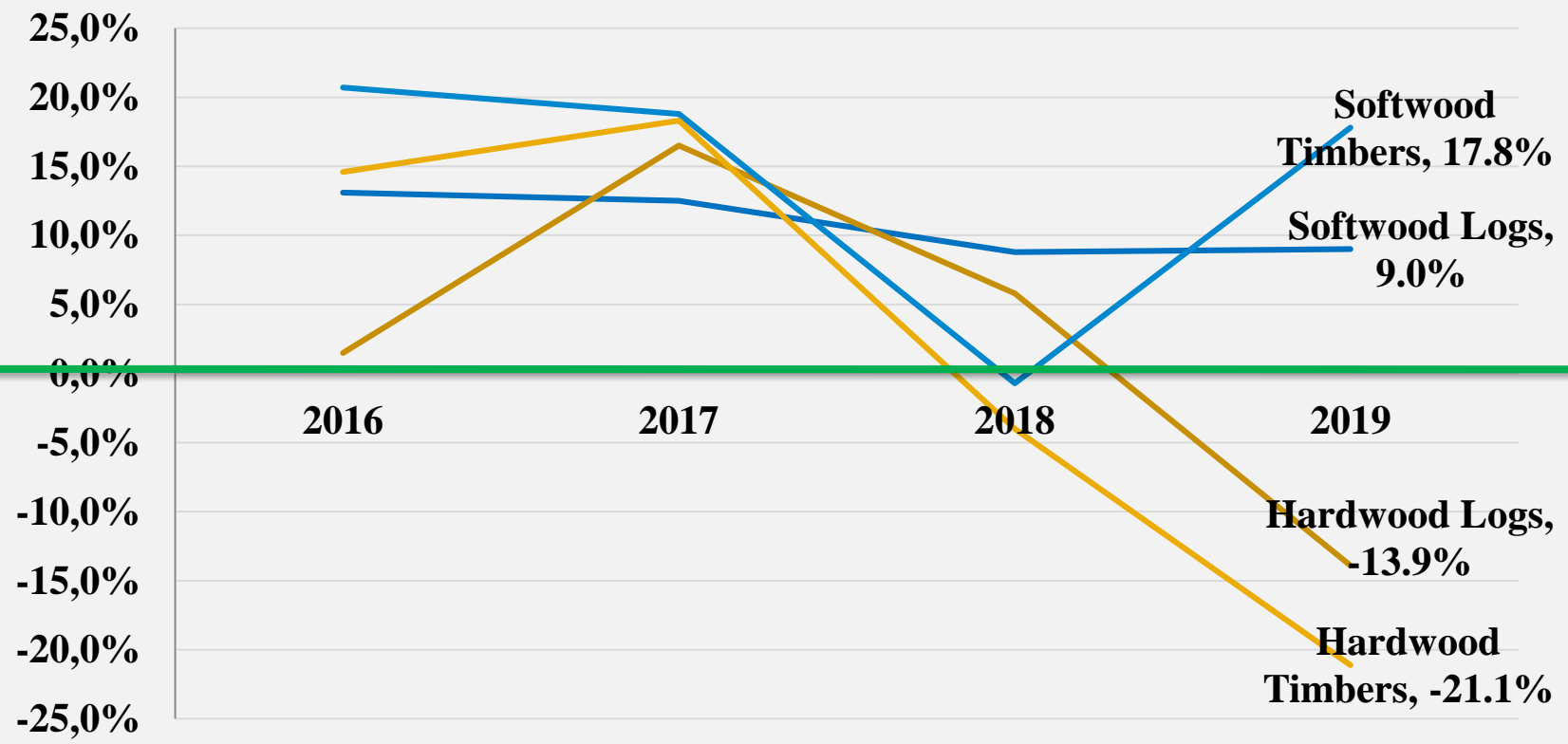
01

## **General Situation of Imported Hardwood**

# Import Statistics From January To July 2019

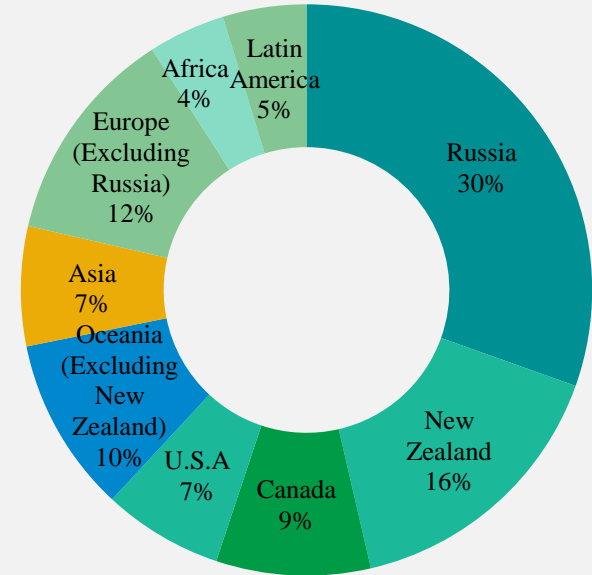
Import	Quantity Of Logs And Timbers Imported		Compared With The Same Period Of Last Year (%)	Import Unit Price (USD / M³)		Compared With The Same Period Of Last Year (%)
	Jan.-Jul. 2018	Jan.-Jul. 2019		Jan.-Jul. 2018	Jan.-Jul. 2019	
I. Quantity Of Log Import (10000 M³)	3551.4	3606.2	1.5%	189	163	-13.9%
Log Amount (USD 100 Million)	67.2	58.8	-12.6%			
1. Quantity Of Softwood Logs	2397.3	2612.3	9.0%	140	129	-8.1%
Amount Of Softwood Log	33.7	33.7	0.2%			
2. Quantity Of Hardwood Logs	1154.1	993.8	-13.9%	290	252	-13.3%
Amount Of Hardwood Logs	33.5	25.0	-25.3%			
Tropical Hardwood Logs	685.1	573.2	-16.3%	336	294	-12.7%
II. Quantity Of Timber Imported	2145.5	2251.0	4.9%	283	235	-17.2%
Amount Of Timber	60.8	52.8	-13.1%			
1. Quantity Of Softwood Timber	1432.3	1688.0	17.8%	204	182	-10.7%
Amount Of Softwood Timber	29.2	30.7	5.2%			
2. Quantity Of Hardwood Timber	713.2	563.0	-21.1%	443	392	-11.4%
Amount Of Hardwood Timber	31.6	22.1	-30.1%			
Tropical Timber	418.44	334.7	-20.0%	420	366	-13.1%
III. Total Import Amount (USD 100 Million)	128	111.6	-12.8%	225	190	-15.2%

**In 2019, China's imports of hardwood decreases rapidly, while softwood timber keeps growing**



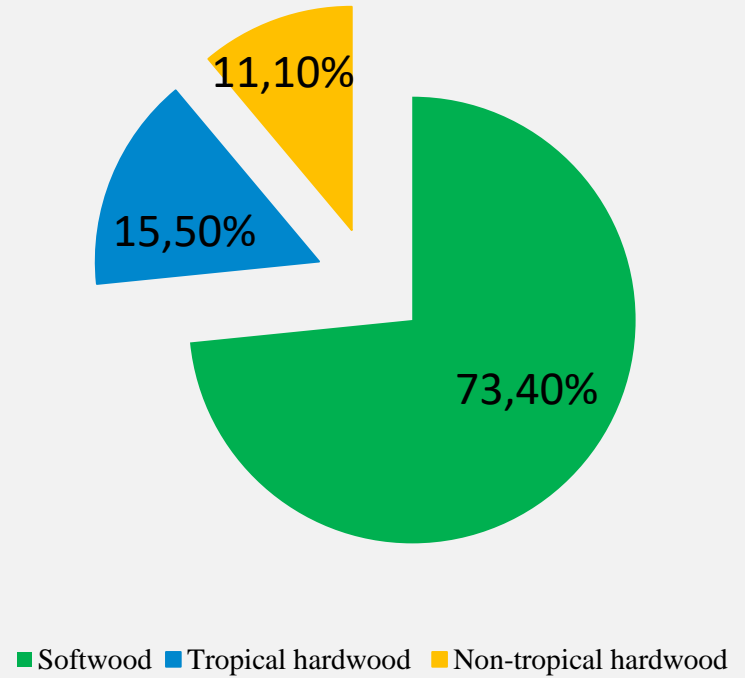
## Statistics Of Region Of Origins From January To July 2019

Region	Jan.-Jul. 2019	Jan.-Jul. 2018	Growth Rate	Proportion
Russia	2070.6	2042.7	1.4%	30.45%
New Zealand	1083.3	972.3	11.4%	15.93%
Canada	594.7	481.6	23.5%	8.74%
U.S.A	462.1	644.4	-28.3%	6.79%
Oceania (Excluding New Zealand)	674.4	654.8	3.0%	9.92%
Asia	460.6	581.6	-20.8%	6.77%
Europe (Excluding Russia)	837.6	550.1	52.3%	12.32%
Africa	295.7	333.0	-11.2%	4.35%
Latin America	321.9	337.6	-4.7%	4.73%
Total	6800.8	6598.0	3.1%	100%

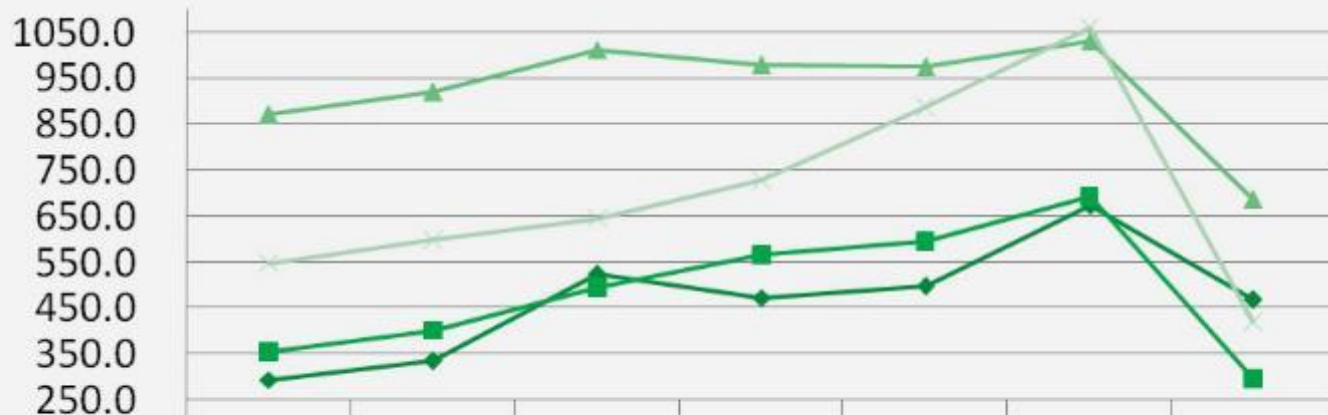


## Statistics of imported wood categories from January to July 2019

Categories	Amount	Proportion
Softwood	4300.3	73.4%
Tropical hardwood	907.9	15.5%
Non-tropical hardwood	648.9	11.1%



## Imported Hardwood From 2012 To 2019



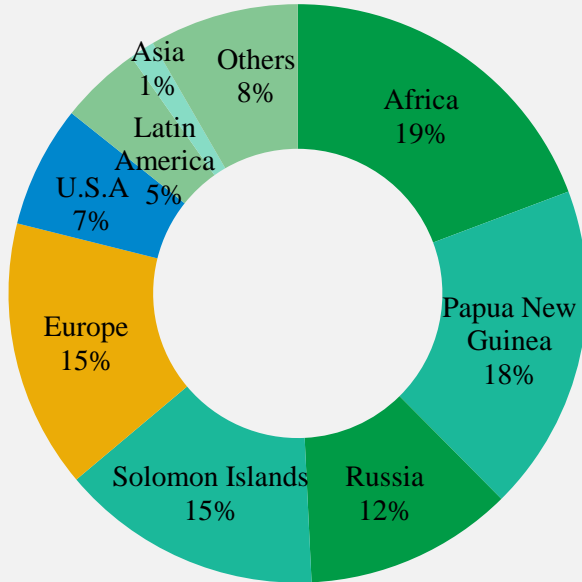
	2012	2013	2014	2015	2016	2017	2018	<b>2019 1-7</b>
◆ Temperate hardwood logs	293.9	334.8	522.6	472.8	497.8	672.1	469.0	420.6
■ Temperate hardwood Timbers	353.8	401.3	493.8	565.8	593.9	692.4	294.7	228.3
▲ Tropical hardwood Logs	870.5	919.2	1013.0	978.2	974.9	1029.4	685.1	573.2
× Tropical hardwood Timbers	547.3	597.9	644.8	728.0	888.2	1060.8	418.4	334.7



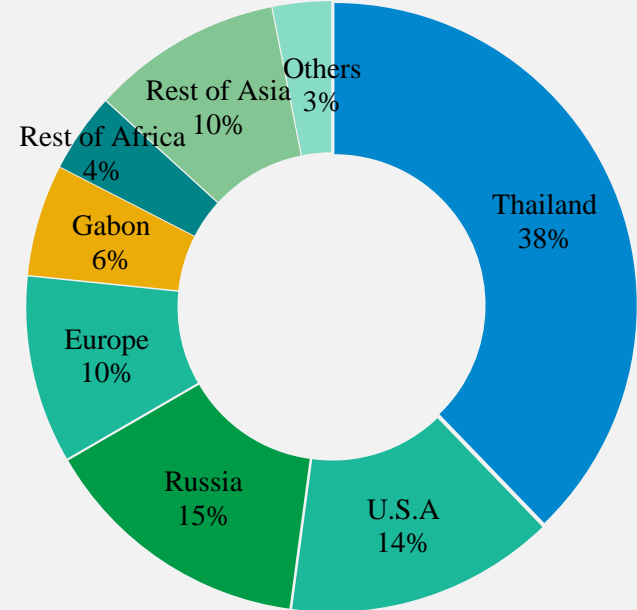
Statistics Of Countries Of Origin (Hardwood Logs And Timbers)													
Hardwood Logs	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth Rate		Hardwood Timbers	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth Rate	
	Amount	Price	Amount	Price	Amount	Price		Amount	Price	Amount	Price	Amount	Price
Africa	199.9	413	250.7	447	-20.3%	-7.4%	Thailand	212.2	294	275.0	323	-22.8%	-9.1%
Papua New Guinea	189.8	184	207.6	232	-8.6%	-20.9%	U.S.A	80.6	647	147.3	708	-45.3%	-8.7%
Russia	121.0	148	172.6	145	-29.9%	2.1%	Russia	81.5	2434	87.8	2144	-7.1%	13.5%
Solomon Islands	151.8	178	171.1	199	-11.2%	-10.8%	Europe	56.0	1262	45.8	1543	22.3%	-18.2%
Europe	155.8	218	148.9	247	4.6%	-11.8%	Gabon	33.3	488	29.8	536	11.7%	-8.8%
U.S.A	70.7	372	82.7	453	-14.4%	-17.9%	Rest of Africa	23.6	622	21.7	652	8.5%	-4.5%
Latin America	46.9	208	48.6	284	-3.3%	-26.6%	Rest of Asia	56.9	417	75.5	514	-24.6%	-18.8%
Asia	14.7	1172	23.4	980	-37.1%	19.6%	Others	17.5	4986	30.2	2849	-41.9%	75.0%
Others	86.6	77	48.5	207	78.6%	-62.8%	Total	561.7	936	713.2	851	-21.2%	10.0%
Total	1037.2	247	1154.1	295	-10.1%	-16.2%							

# Statistics of regions of origin

## Hardwood Logs



## Hardwood Timbers



# Statistics Of Hardwood Main Tree Species

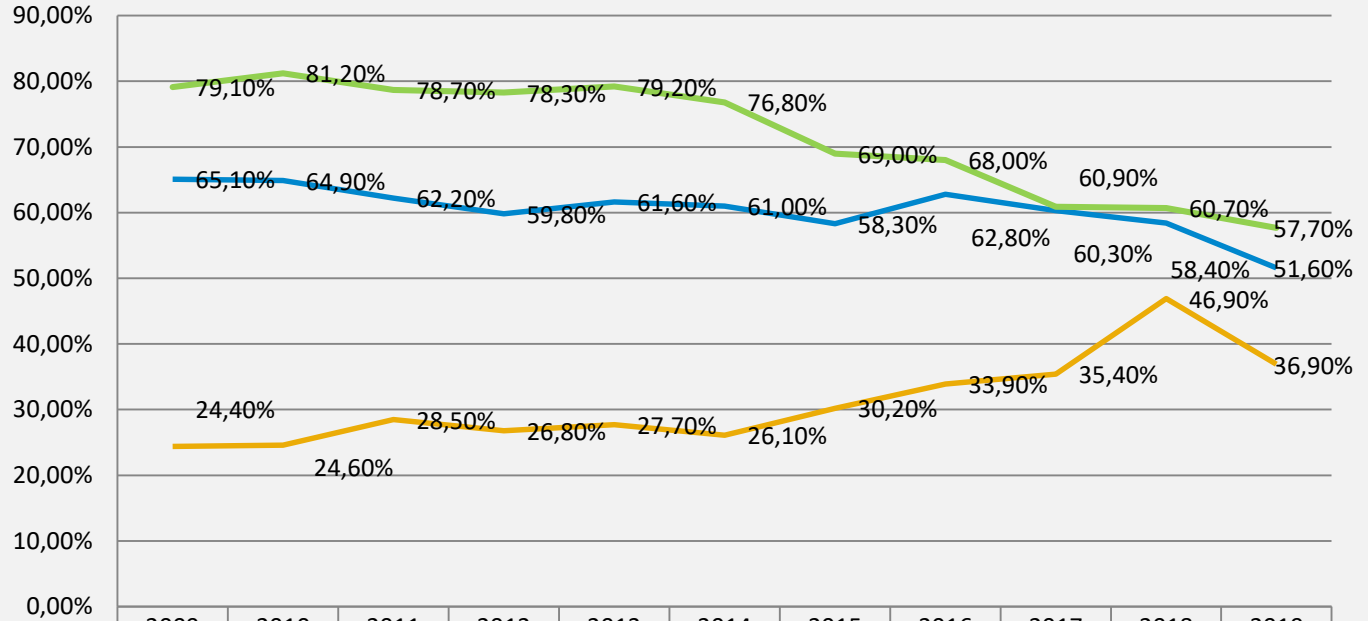
Logs	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth Rate(%)		Proportion	Timbers	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth Rate(%)		Proportion
	Amount	Price	Amount	Price	Amount (%)	Price (%)			Amount	Price	Amount (%)	Price (%)			
Total	1037.2	247	1154.1	295	-10.1%	-16.2%	100.0%	Total	561.73	936	713.15	851	-21.23%	9.96%	100%
White Ash	5.0	330	7.5	334	-33.1%	-1.3%	0.6%	TEAK	1.48	738	2.60	746	-42.88%	-1.09%	0.26%
Oak	65.2	328	85.5	346	-23.7%	-5.1%	7.4%	Merbau	4.02	866	9.31	883	-56.76%	-1.96%	0.72%
Beech	50.6	209	60.1	231	-15.9%	-9.4%	5.2%	Oak	58.70	552	93.97	624	-37.53%	-11.44%	10.45%
North American Hardwood	61.0	365	63.0	477	-3.2%	-23.5%	5.5%	Beech	41.83	378	43.84	428	-4.58%	-11.60%	7.45%
Eucalyptus	109.3	76	53.2	131	105.4%	-41.9%	4.6%	Sapele	5.03	679	3.48	691	44.69%	-1.74%	0.90%
Poplar	35.8	103	37.1	108	-3.5%	-4.1%	3.2%	Ash	23.96	534	28.85	597	-16.96%	-10.47%	4.26%
Birch	84.3	133	151.1	133	-44.2%	0.1%	13.1%	Maple	3.40	551	5.08	539	-33.10%	2.22%	0.60%
TEAK	0.5	663	1.4	550	-62.6%	20.6%	0.1%	Cherry	8.83	712	12.84	824	-31.21%	-13.61%	1.57%
Oak Man	48.4	318	42.3	279	14.4%	14.3%	3.7%	Birch	46.58	182	45.38	203	2.64%	-10.40%	8.29%
Merbau	11.4	425	14.9	484	-23.3%	-12.1%	1.3%	Rosewood	2.28	1507	3.21	1578	-28.86%	-4.48%	0.41%
Rosewood	5.6	2310	6.4	2060	-13.3%	12.1%	0.6%	North American Hardwood	18.71	663	35.48	646	-47.25%	2.54%	3.33%
Others	560.1	257	631.6	317	-11.3%	-19.1%	54.7%	Others	346.91	1223	429.13	1047	-19.16%	16.79%	61.76%






**02**

## **Analysis Of Tropical Hardwood**

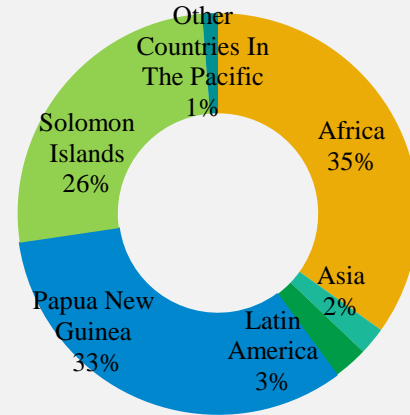
# Overview



	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
 Tropical Timber / Hardwood Timber	65,10%	64,90%	62,20%	59,80%	61,60%	61,00%	58,30%	62,80%	60,30%	58,40%	51,60%
 Tropical Log / Hardwood Log	79,10%	81,20%	78,70%	78,30%	79,20%	76,80%	69,00%	68,00%	60,90%	60,70%	57,70%
 Tropical Timber / Hardwood	24,40%	24,60%	28,50%	26,80%	27,70%	26,10%	30,20%	33,90%	35,40%	46,90%	36,90%

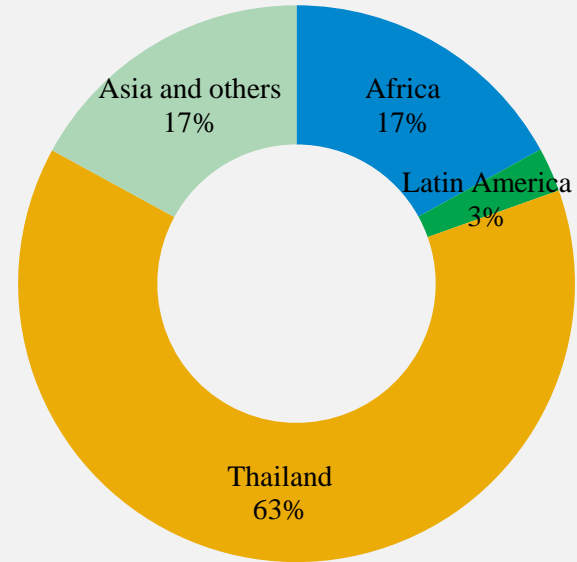
# Imported Tropical Logs Origins

Tropical Logs	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth Rate	
	Amount	Price	Amount	Price	Amount	Price
Africa	199.90	413.36	250.00	447.48	-20.04%	-7.63%
Asia	12.80	1243.68	21.88	1027.28	-41.47%	21.06%
Latin America	16.07	388.93	31.63	370.25	-49.19%	5.04%
Papua New Guinea	187.78	184.07	203.81	233.01	-7.86%	-21.00%
Solomon Islands	149.37	178.63	168.95	200.06	-11.59%	-10.71%
Other Countries In The Pacific	7.28	315.67	8.82	357.74	-17.40%	-11.76%
<b>Total</b>	<b>573.21</b>	<b>293.70</b>	<b>685.08</b>	<b>336.45</b>	<b>-16.33%</b>	<b>-12.71%</b>



## Imported Tropical Timbers origins

Tropical Timbers	Jan.-Jul. 2019		Jan.-Jul. 2018		Growth rate	
	Amount	Price	Amount	Price	Amount	Price
Africa	56.90	545	51.46	585	10.57%	-6.89%
Latin America	8.60	663	11.50	668	-25.15%	-0.78%
Thailand	212.16	295	274.95	357	-22.84%	-17.27%
Asia and others	57.07	404	80.53	498	-29.13%	-18.79%
Total	334.73	366	418.44	420	-20.00%	-13.05%



## Imported Tropical African Hardwood Log

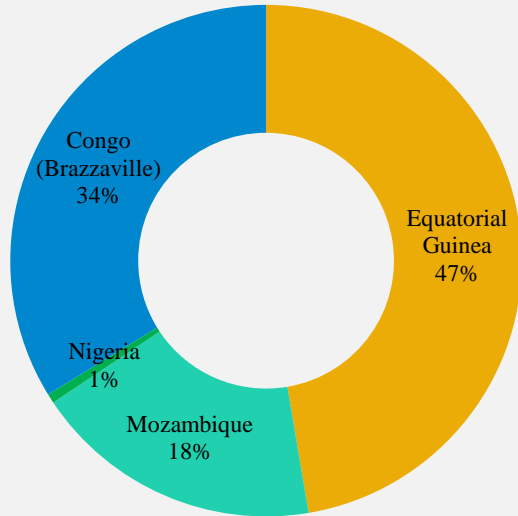
Logs	Jan.-Jul. 2019	Jan.-Jul. 2018	Growth Rate
Equatorial Guinea	57.98	73.36	-20.97%
Mozambique	22.42	31.95	-29.81%
Nigeria	0.73	25.53	-97.14%
Congo (Brazzaville)	41.35	24.69	67.50%
Cameroon	30.41	37.62	-19.16%
Others	47.01	56.85	-17.32%
<b>Total</b>	<b>199.90</b>	<b>250.00</b>	<b>-20.04%</b>

## Imported Tropical African Hardwood Timber

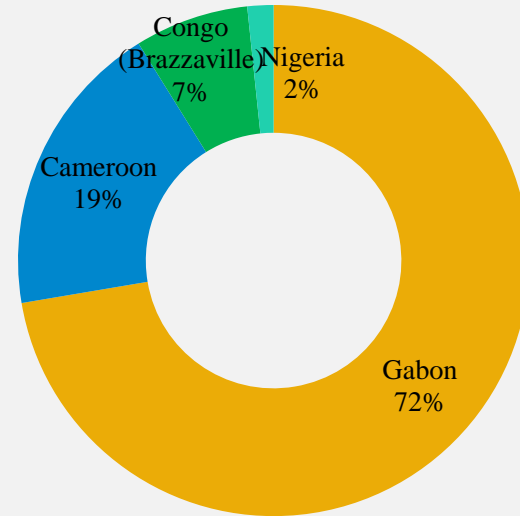
Timbers	Jan.-Jul. 2019	Jan.-Jul. 2018	Growth Rate
Gabon	33.32	29.84	11.69%
Cameroon	8.66	7.66	13.06%
Congo (Brazzaville)	3.32	2.00	66.57%
Nigeria	0.76	3.94	-80.63%
Others	10.84	8.04	34.86%
<b>Total</b>	<b>56.90</b>	<b>51.46</b>	<b>10.57%</b>



## Imported Tropical African Hardwood Logs



## Imported Tropical African Hardwood Timbers



## Trends in African Hardwood Industry

1. China's demand for importing lumber is a long-term decision. The total amount will remain stable.
2. The economies of many African countries depend on income from forestry. Sustainable forest development management will be strengthened.
3. Export product structure is being changed. Meanwhile log export volume will be correspondingly reduced , timber export volume will increase substantially.
4. The local wood processing industry in African countries has been extended. Products focus on branding, specialization, standardization.



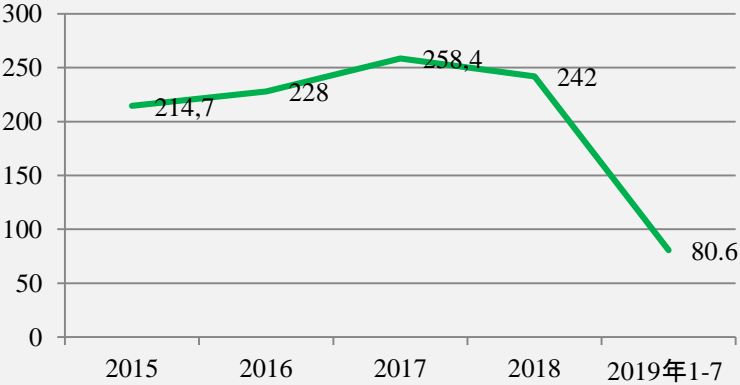
**03**

**Imported American hardwood**

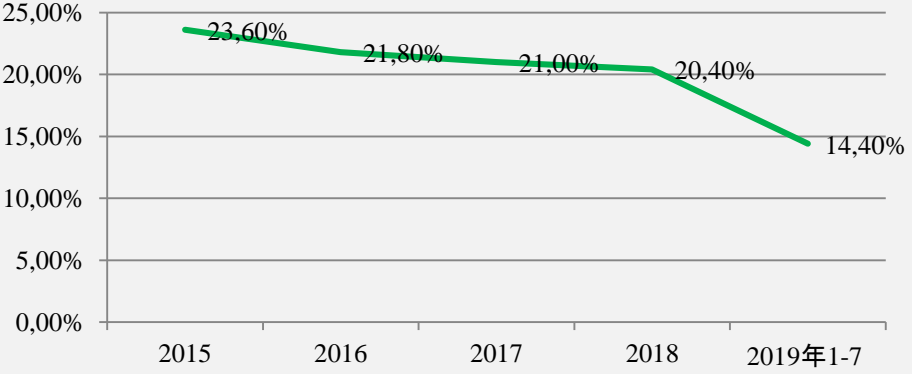
# Imported American Hardwood

Hardwood Timber	2015	2016	2017	2018	2019 1-7
Quantity Of Imported American Hardwood Timber	214.7	228.0	258.4	242.0	80.6
Proportion In Total Imports	23.6%	21.8%	21.0%	20.4%	14.4%

### Quantity Of Imported American Hardwood Timber



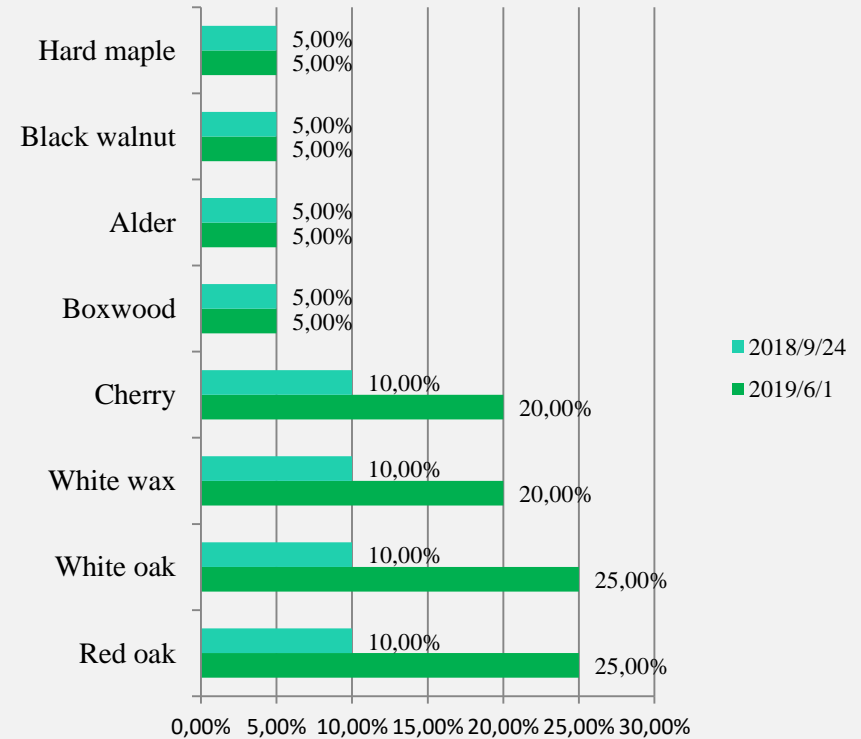
### Proportion In Total Imports



## Statistics Of Import Volume Of Main Materials From January To July 2019

	Import Volume Jan. –July 2019	Price	Import Volume Jan. –July 2018	Price
Red Oak	40	495	73	669
Maple	2	435	4	546
Cherry	8	622	12	826
Ash	11	534	18	677

## American Lumber Tariff Rate



## The Current State Of The American Hardwood Market

1. U.S. hardwood exports depend on the Chinese market, and furniture imports also depend on the Chinese market.
2. China has no intention of abandoning its log import rules, which require U.S. logs to be barked or fumigated before leaving U.S. ports.
3. Pricing mechanism restarted. In the early stage, it may be Shared by both importers and exporters, but if the tariff rate exceeds 10%, it will be passed on to consumers.

## The Future Of American Hardwood Industry

1. In China, solid wood home furnishing manufacturing industry will gradually change from export (decade ago) to domestic sales (nowadays) .
2. According to industry analysis, market pattern of hardwood in North America will be changed. Industries will be subdivided and moved to new manufacturing countries such as Vietnam and Mexico.
3. Focus on market segments, mainstream products and special grade specifications customized production.



Thanks!