

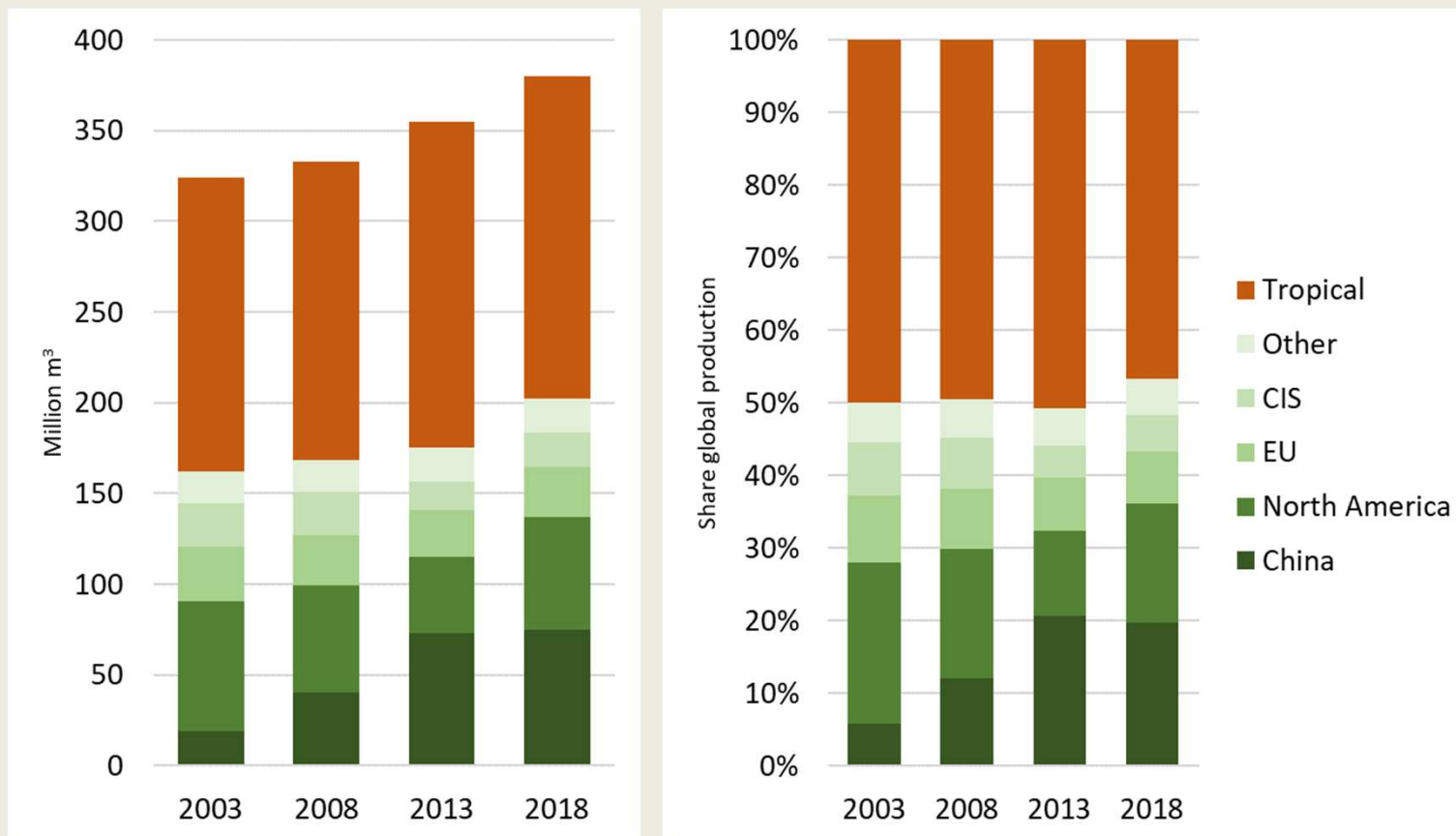
World tropical timber production, trade and market trends

**Presentation for International Forum
Together Towards Global Green Supply Chains, Shanghai
22 October 2019
Rupert Oliver, FLEGT IMM Trade Analyst**



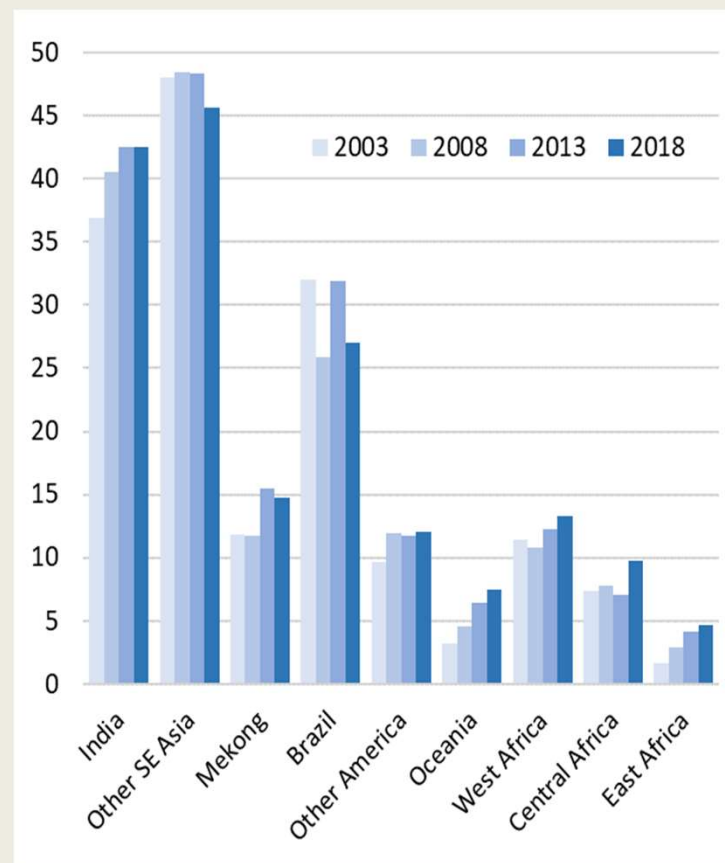
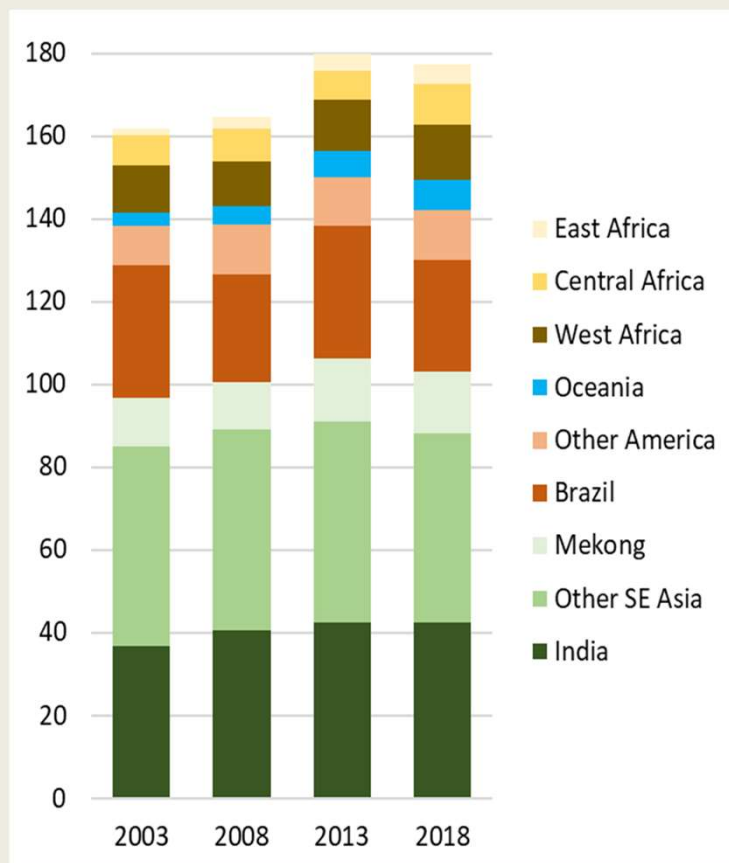
Independent Market Monitoring of FLEGT-Licensed Timber

Global hardwood saw log and veneer log production, by global region, 2003, 2008, 2013, 2018



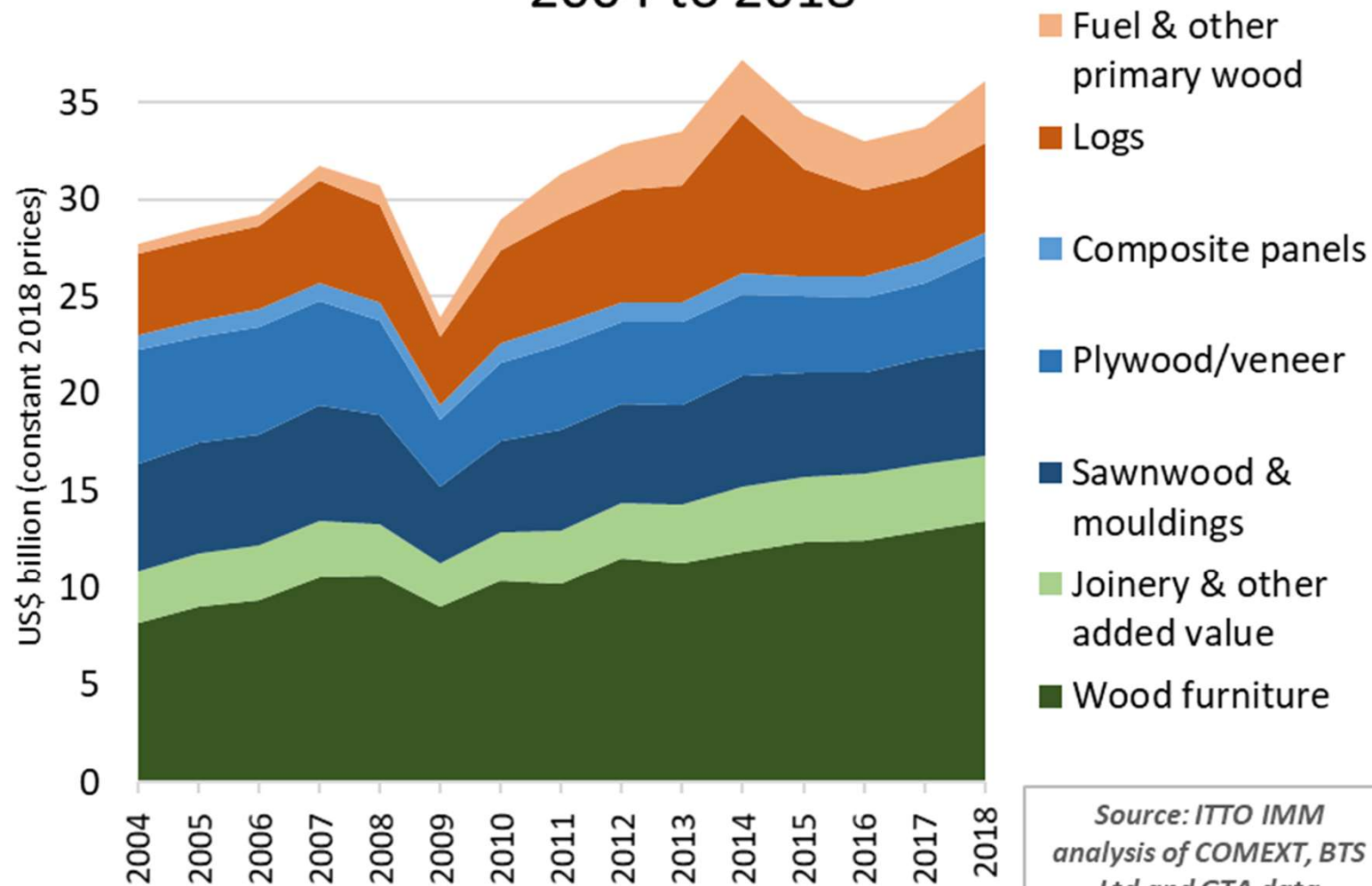
Source: ITTO/FAOSTAT

Tropical hardwood saw log and veneer log production, by global region, 2003, 2008, 2013, 2018 (*million m3*)

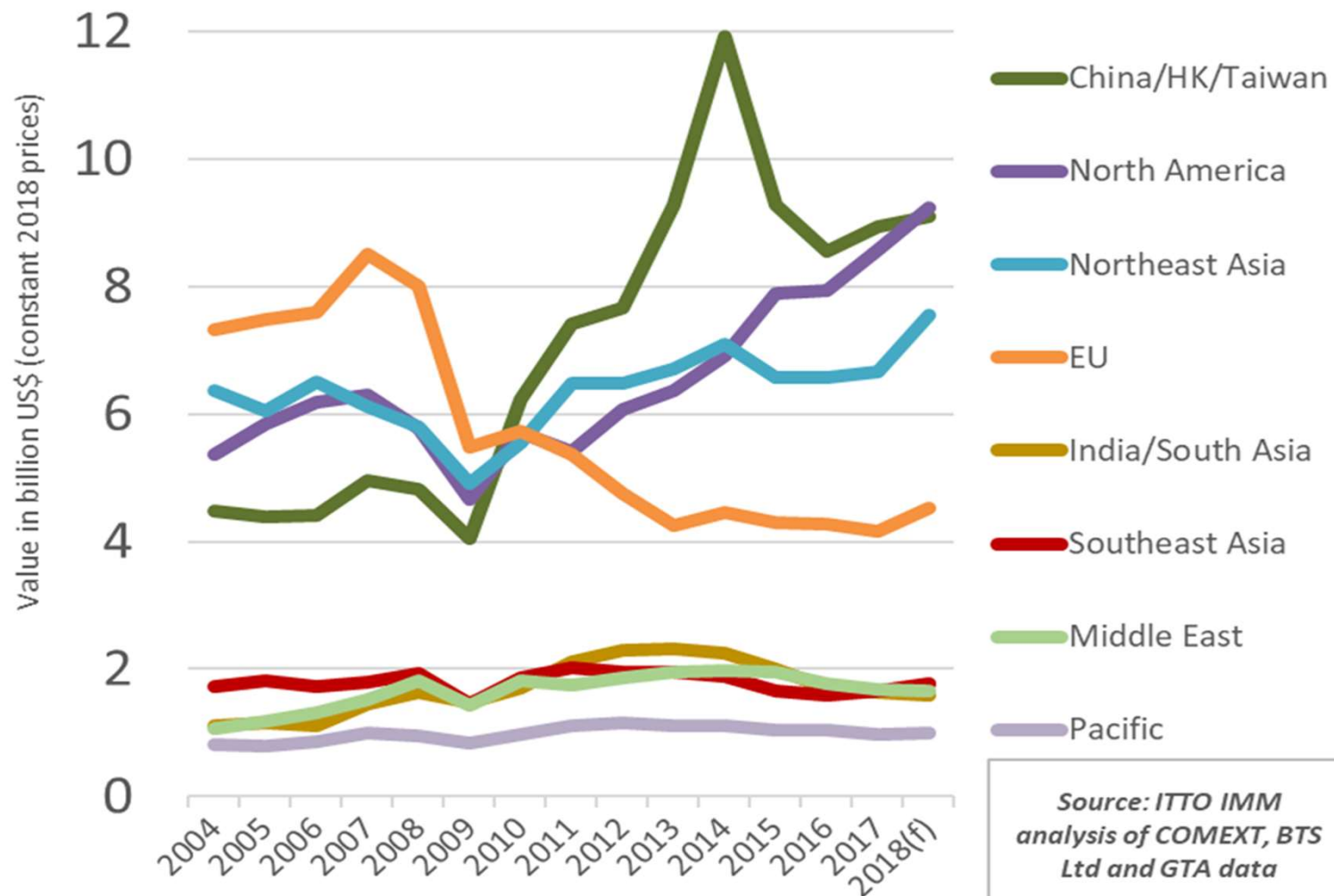


Source: ITTO/FAOSTAT

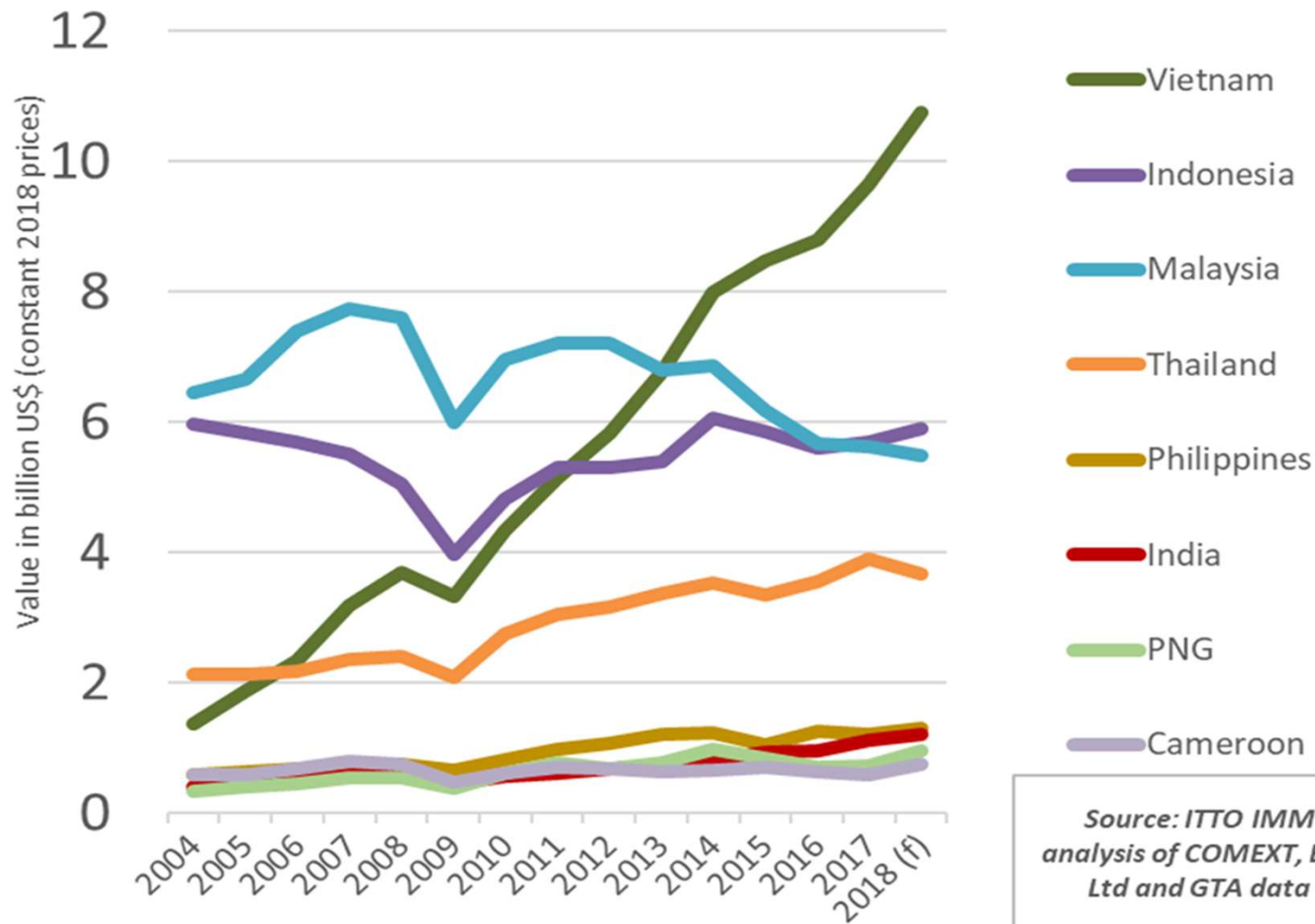
Global tropical wood trade by product group: 2004 to 2018



Tropical wood product imports by global region 2004 to 2018

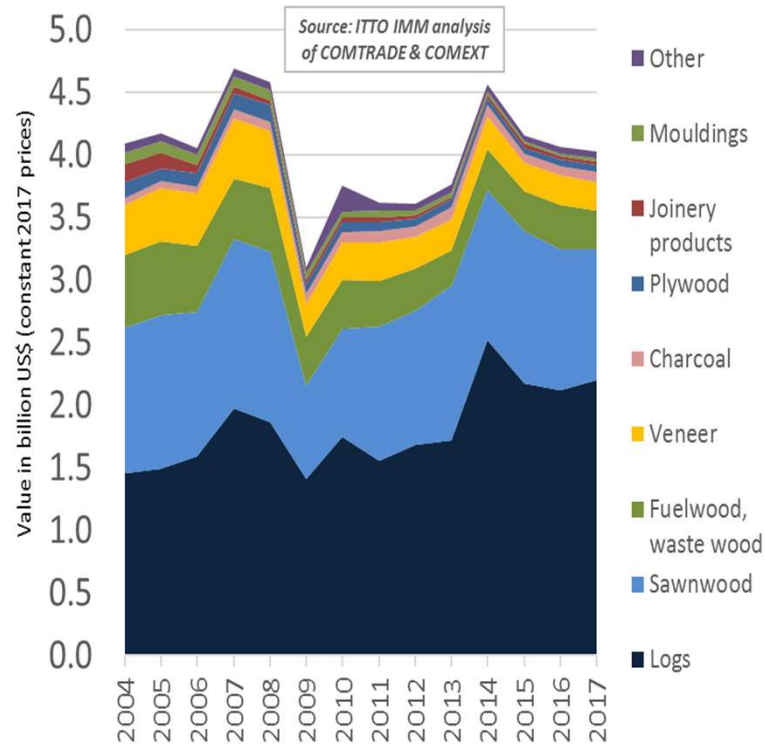


Tropical wood product trade by main supply countries - 2004 to 2018

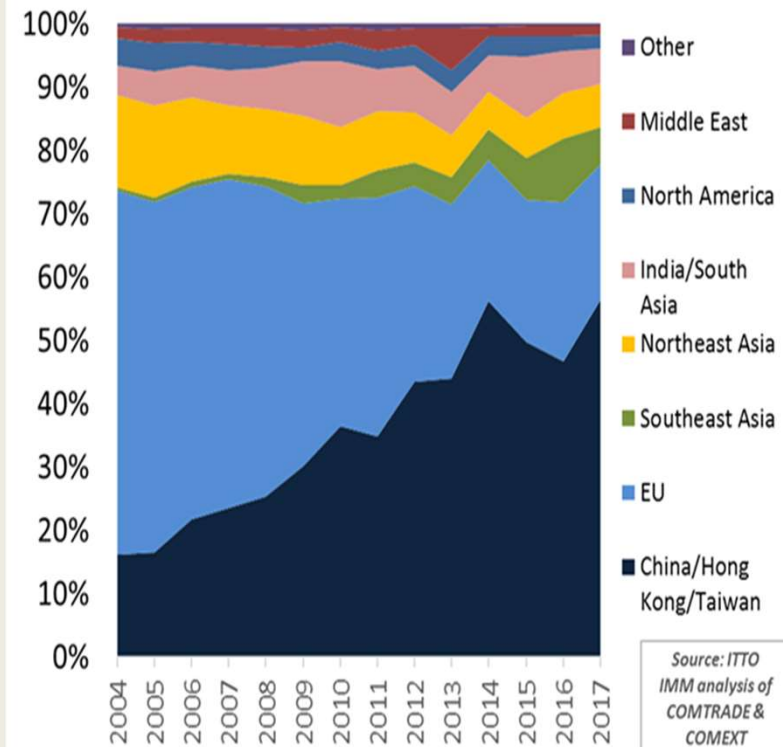


Africa's continuing dependence on primary wood exports

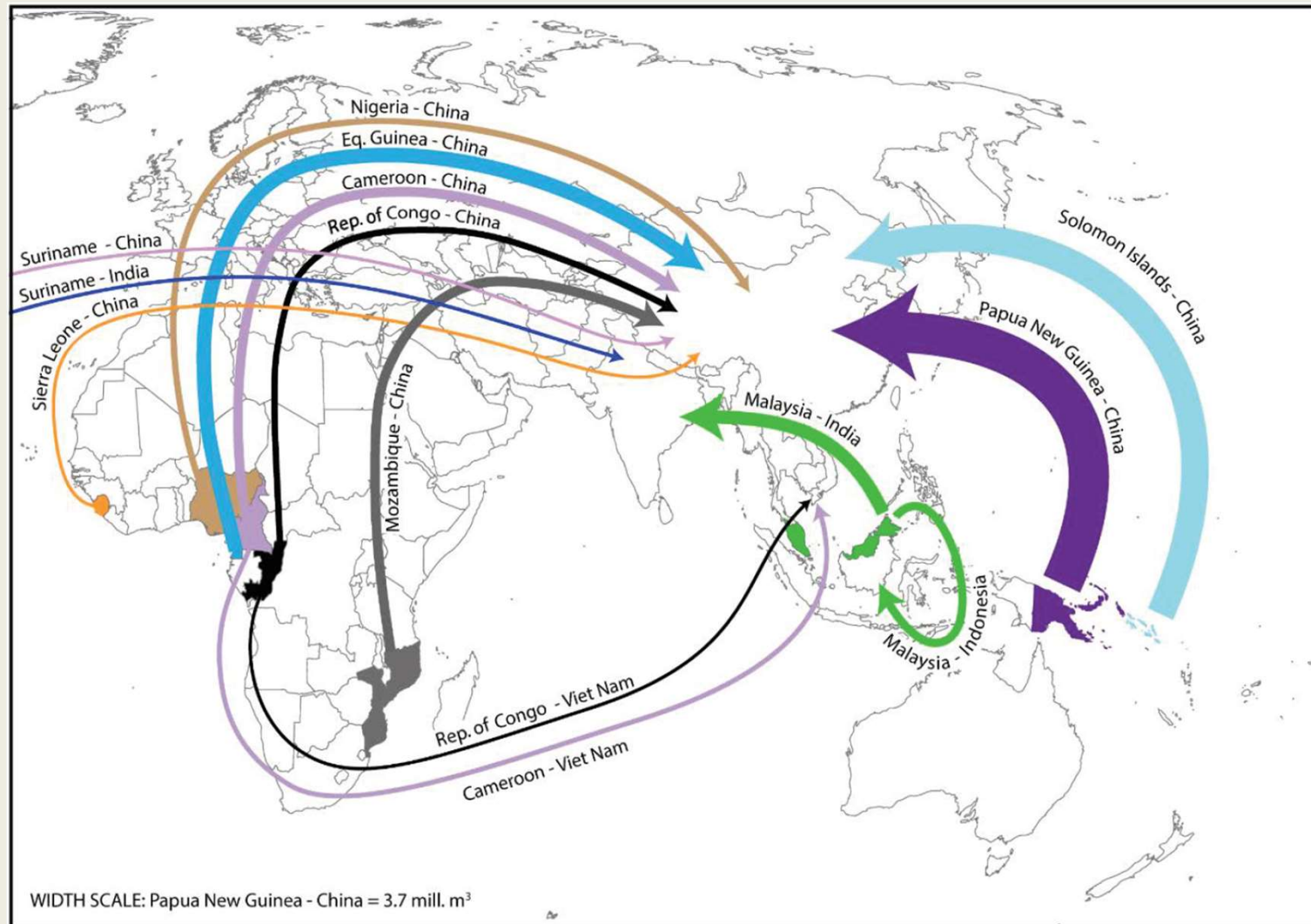
Value of timber exports from the African continent
by product - 2004 to 2017



Share of timber US\$ export value from the African
continent by destination - 2004 to 2017

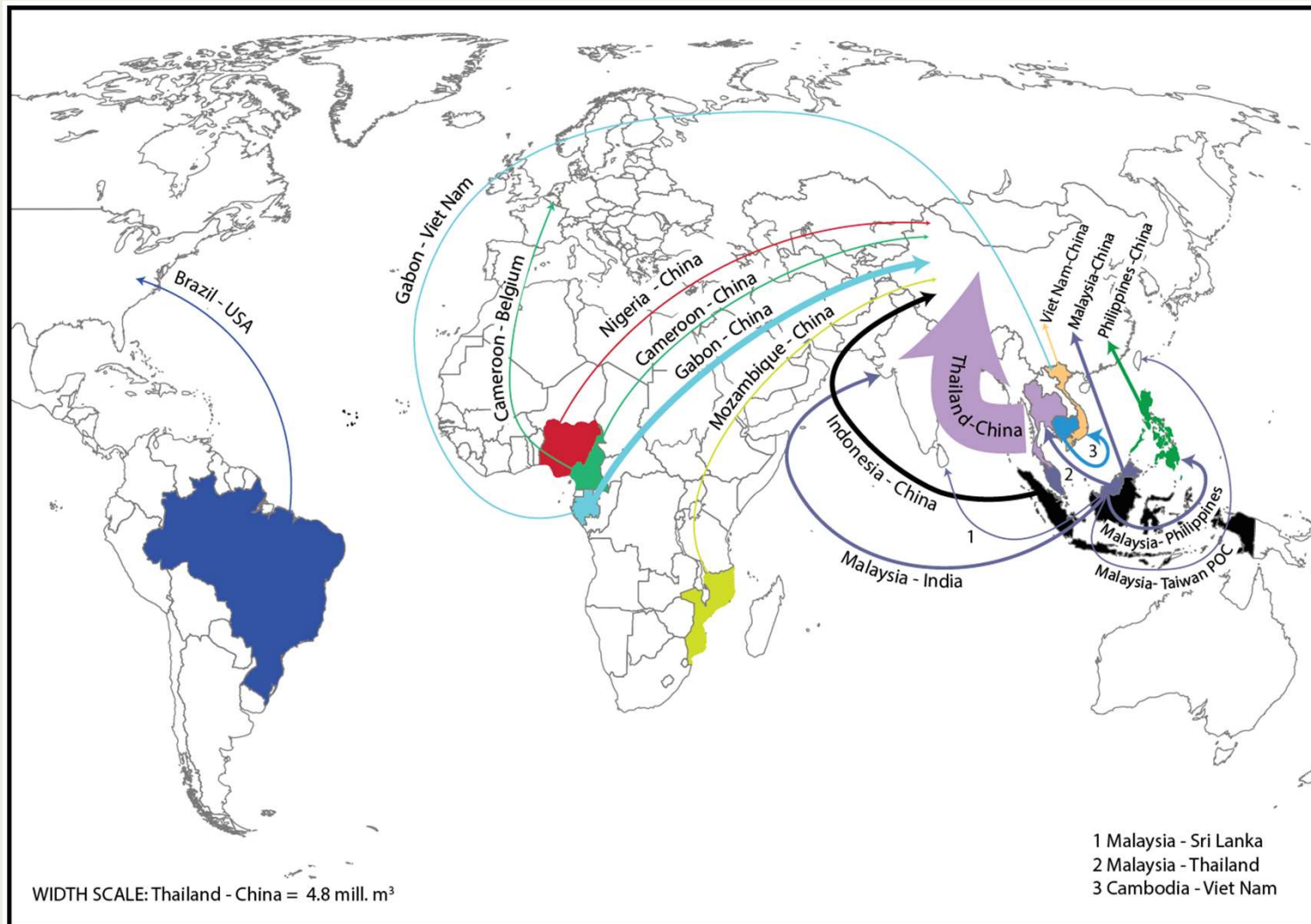


Main Tropical Log Flows 2018 (million m³)



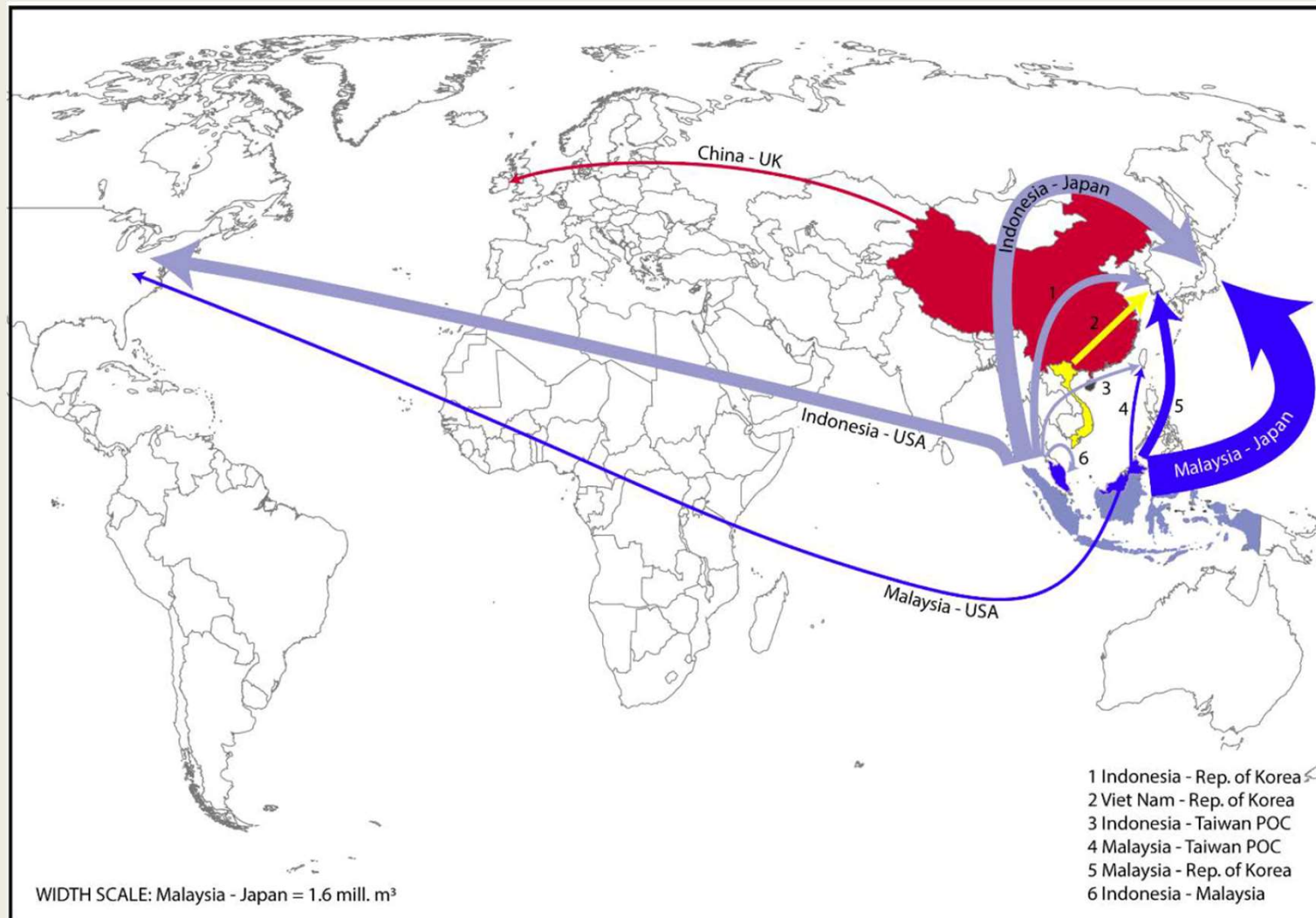
Source: ITTO Biennial Review and Assessment of the World Timber Situation 2017-2018

Main Tropical Sawnwood Flows 2018 (million m³)



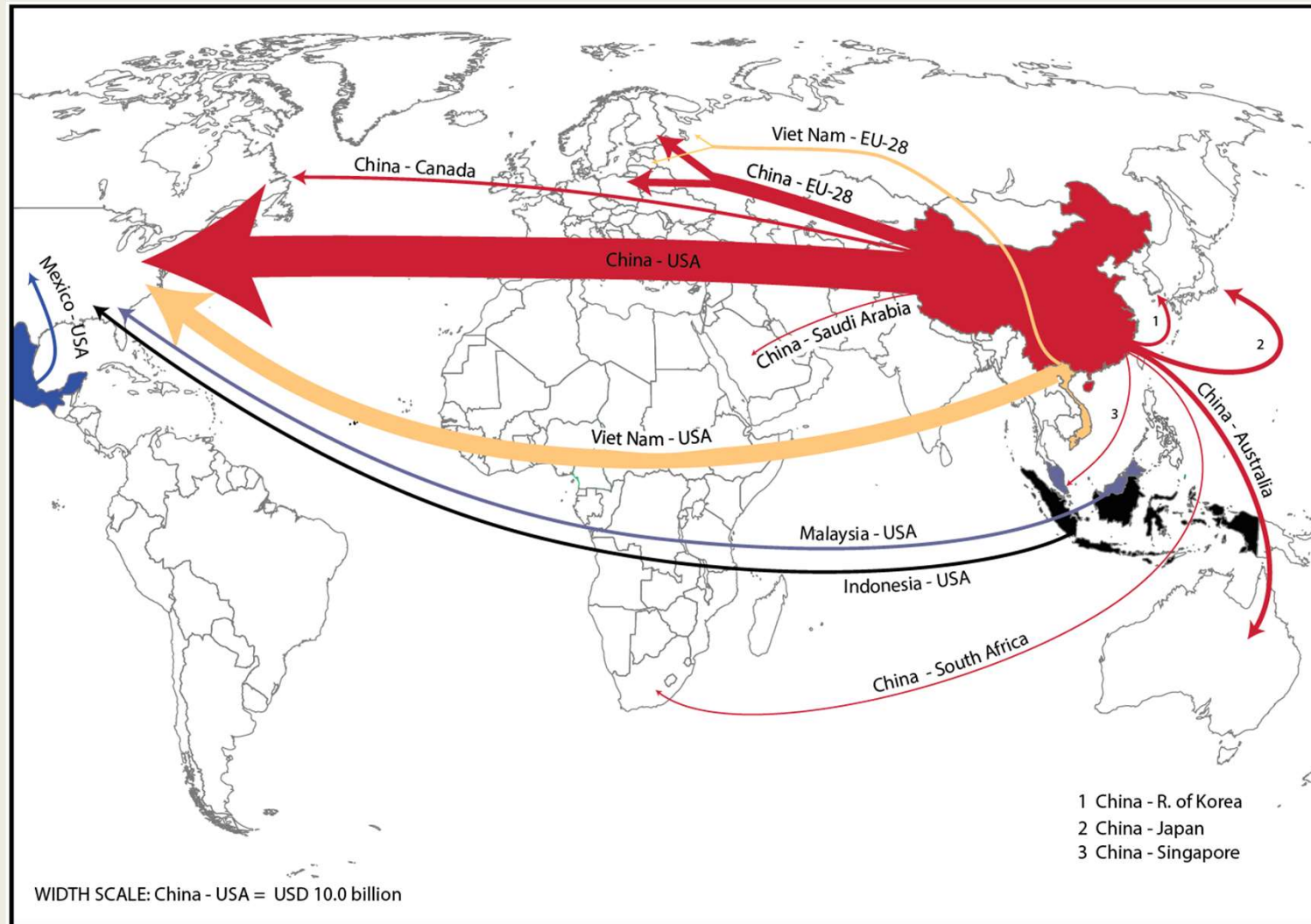
Source: ITTO Biennial Review and Assessment of the World Timber Situation 2017-2018

Main Tropical Plywood Flows 2018 (million m³)



Source: ITTO Biennial Review and Assessment of the World Timber Situation 2017-2018

Wooden Furniture Flows from China and ITTO Producer Countries 2018 (million m3)

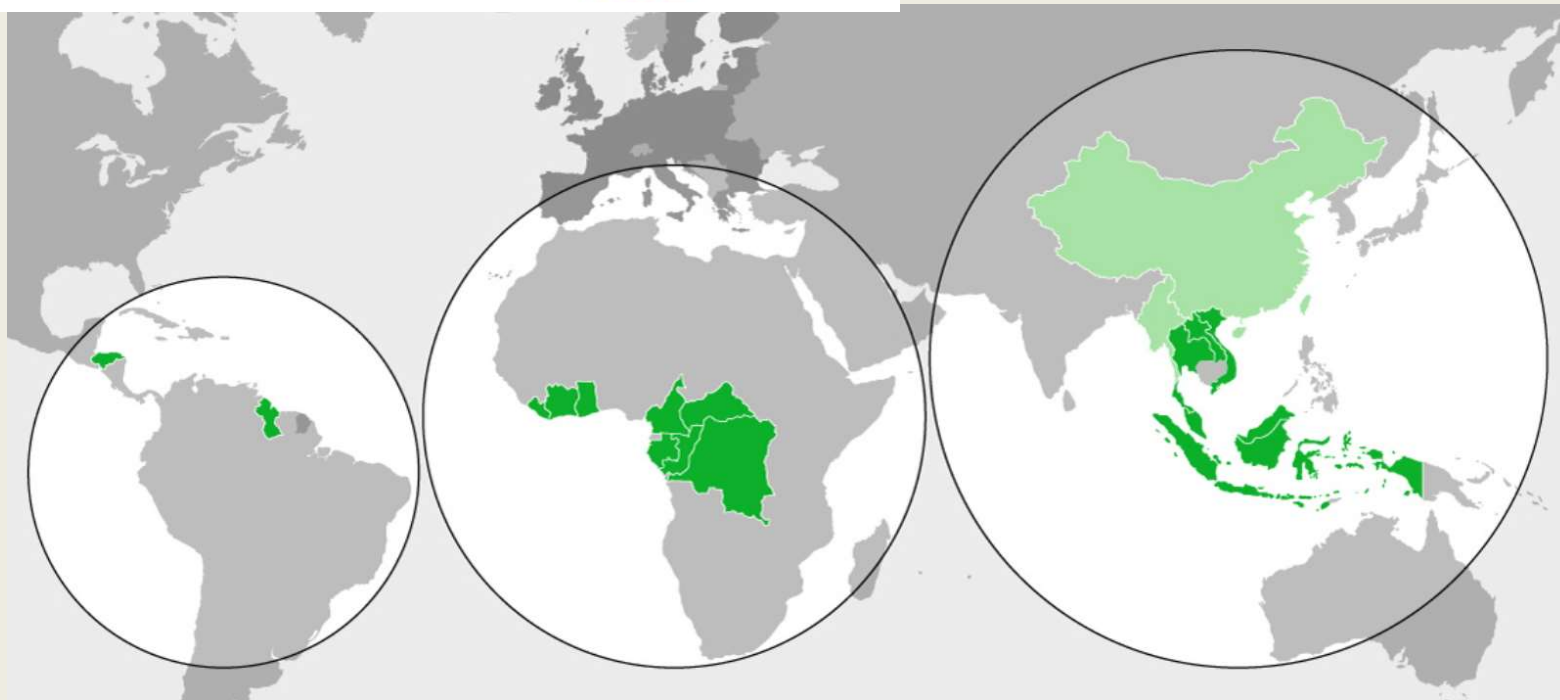


Source: ITTO Biennial Review and Assessment of the World Timber Situation 2017-2018

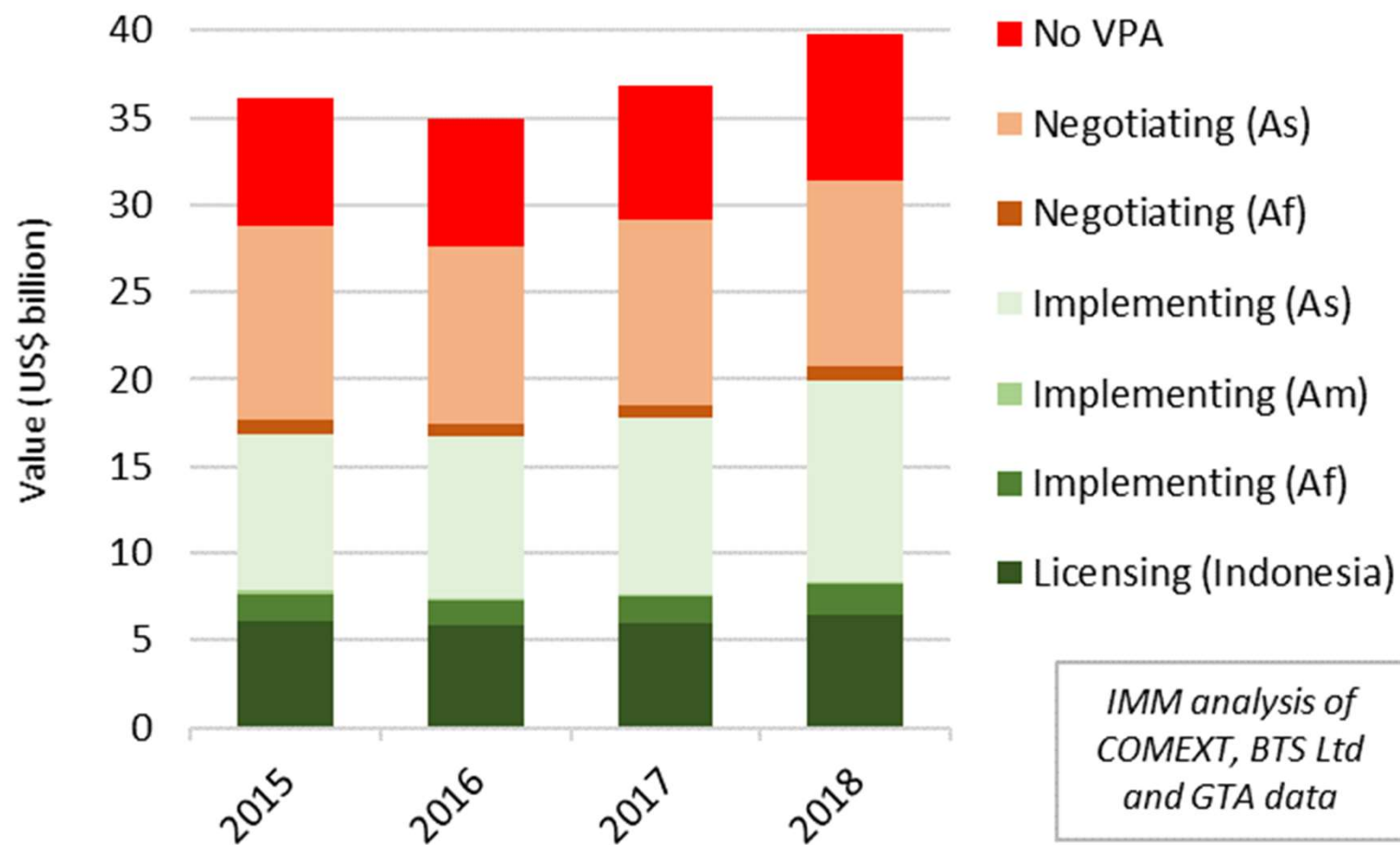
Timber Legality Assurance Systems (TLAS) development

VPA countries

- Cameroon
- Central African Republic
- Côte d'Ivoire
- Democratic Republic of the Congo
- Gabon
- Ghana
- Guyana
- Honduras
- Indonesia
- Laos
- Liberia
- Malaysia
- Republic of the Congo
- Thailand
- Vietnam

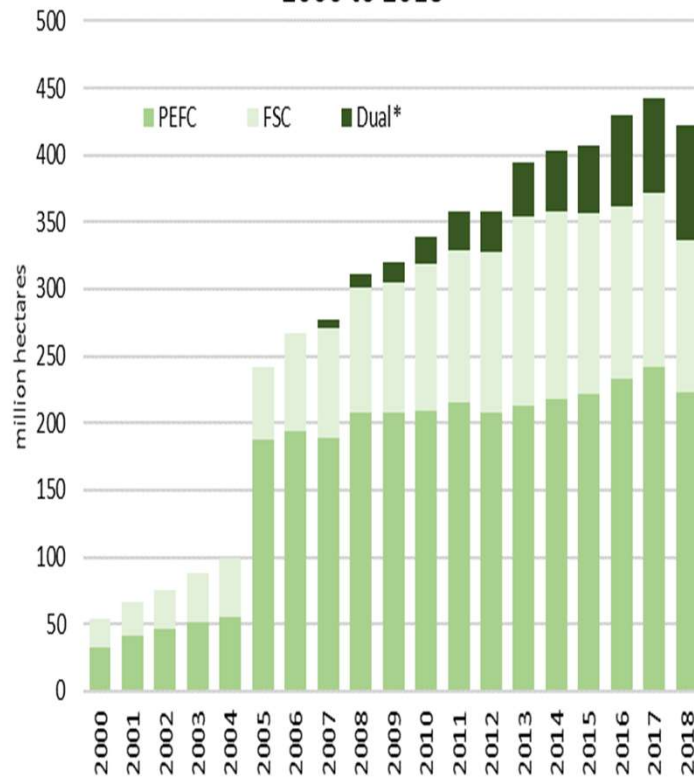


Global tropical wood trade by FLEGT VPA status: 2015 to 2018



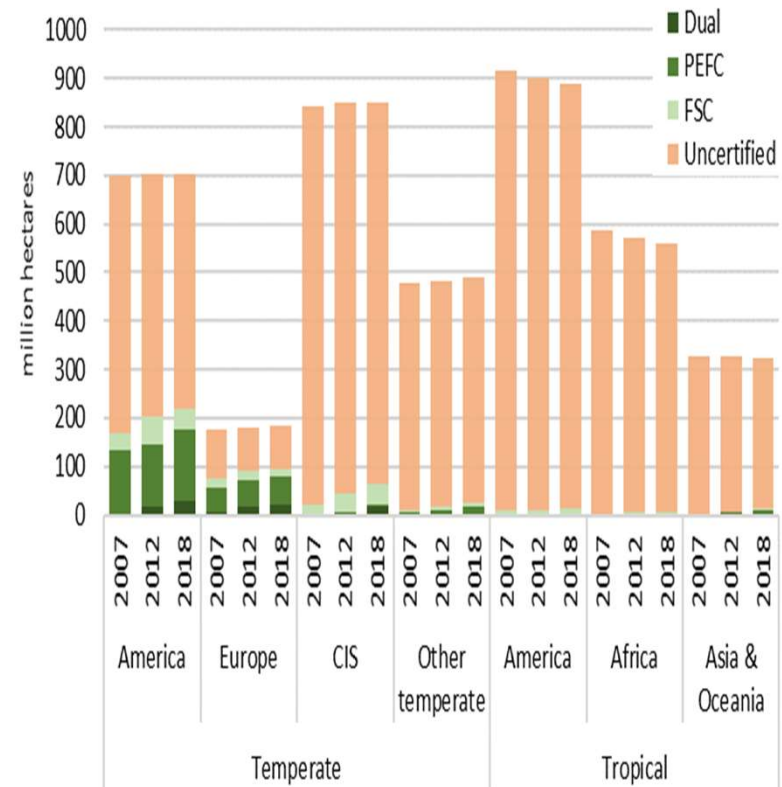
Uneven growth in forest certification

Worldwide area of 3rd party certified forest -
2000 to 2018

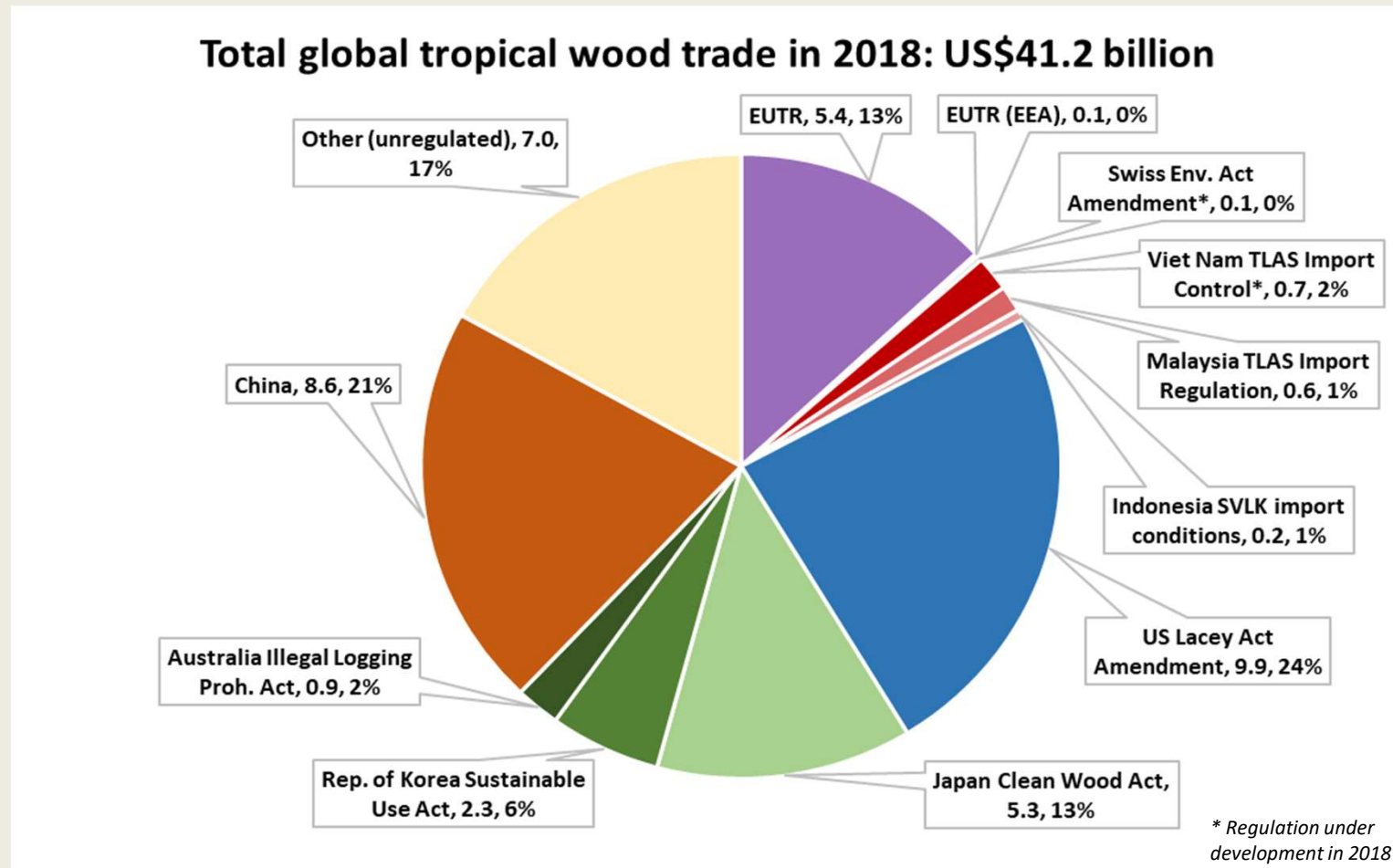


* dual is area certified to both PEFC and FSC

Forest area by global forest region and
certification status



% of global tropical wood import value subject to import control in 2018



Source: FLEGT IMM analysis of BTS Ltd & COMEXT trade data & various policy documents

Concluding comments

- Supply side for tropical timber
 - Increasing role of plantations in Asia
 - Move up the value chain
 - Fragmented supply base and supply chain
 - TLAS development – emerging network effects
 - Potential synergies with forest certification
- Demand side for tropical timber
 - Domestic market typically at least 50% of volume consumption
 - Key role of China in international trade
 - Overall slowdown in trade – at least in short term?
 - Regulations to exclude illegal wood in import trade – Australia, EU, Indonesia, Japan, Korea, Malaysia, US, Vietnam
 - On-going substitution trends
 - Increased focus on carbon credentials of products

Thank you

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