

Market trends for tropical woods

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Hardwood Processing*

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Paris - France***

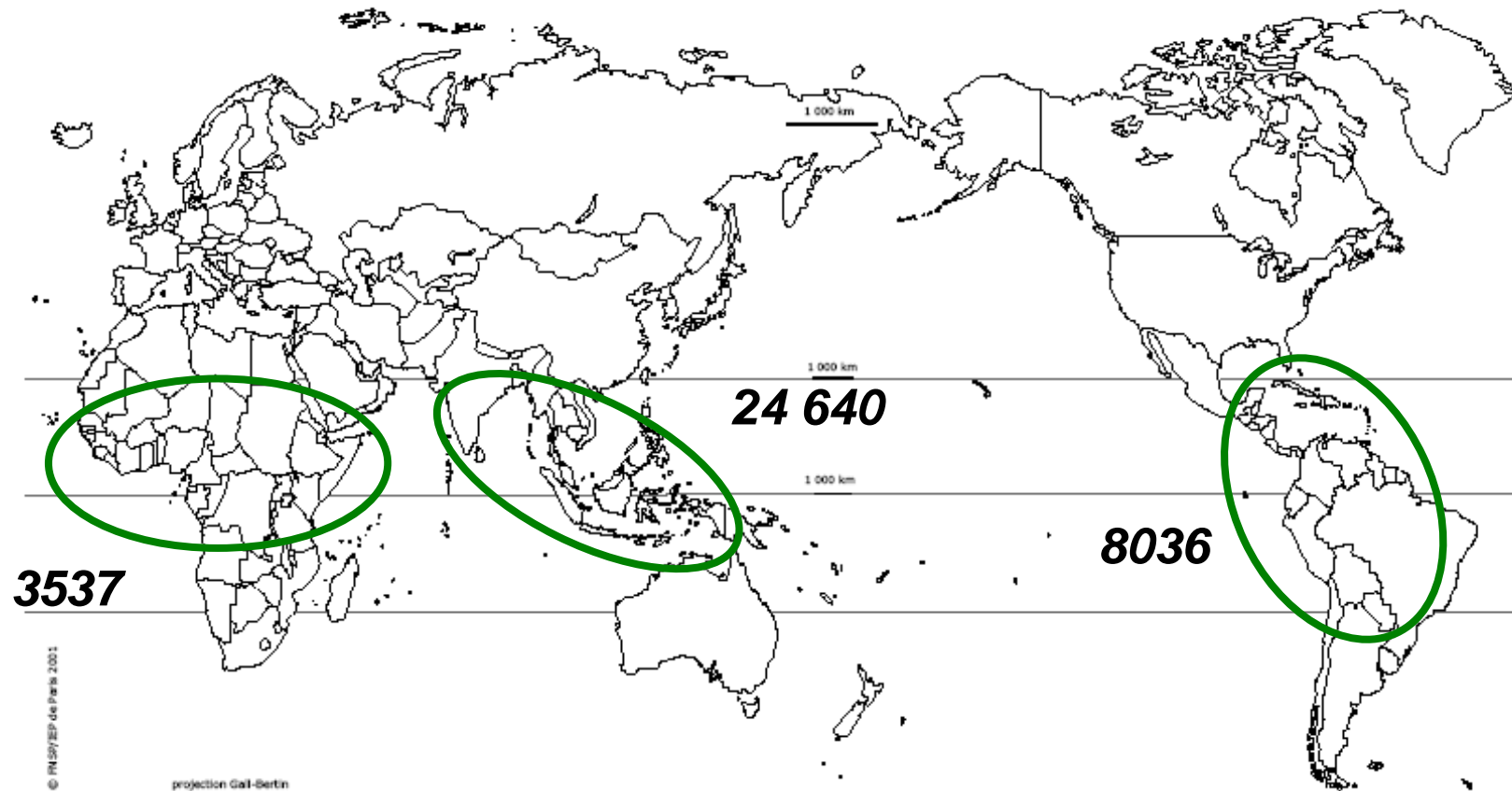
Major tropical areas of production



In 2000, 1.8 billion hectares = 46% of forest surface

(FAO)

Productive Forests plantations Areas in the Tropics (x 1000 ha)



Source SOFO FAO 2005 + SCTP

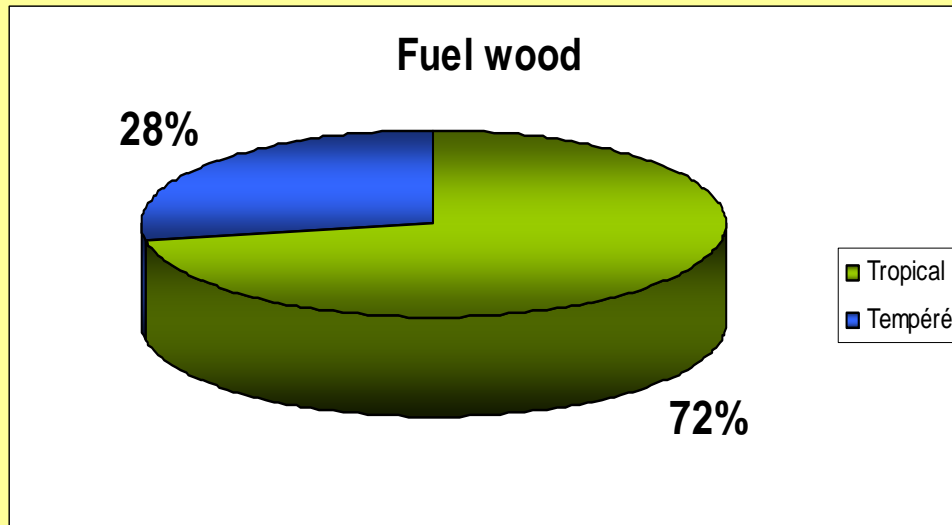
Main Tree species planted by tropical region

Region	Eucalyp	Rubber tree	Teak	Acacias	Pine	Others
Asia 24.6 Mha	3 552	6 086	5 629	3 154	2 757	3 462
Africa 3.5 Mha	1 077	304	231	185	748	780
Lat.Am. 8.0 Mha	3 990	235	133	178	2 920	742
Total	8 619	6 625	5 993	3 517	6 425	4 984

Source SOFO FAO 2005 SCTP

2nd ISCHP / Paris / Sept 09

Wood consumption in the World



Fuel wood

1,8 billion de m³

> 1,3 Tropical (72%)

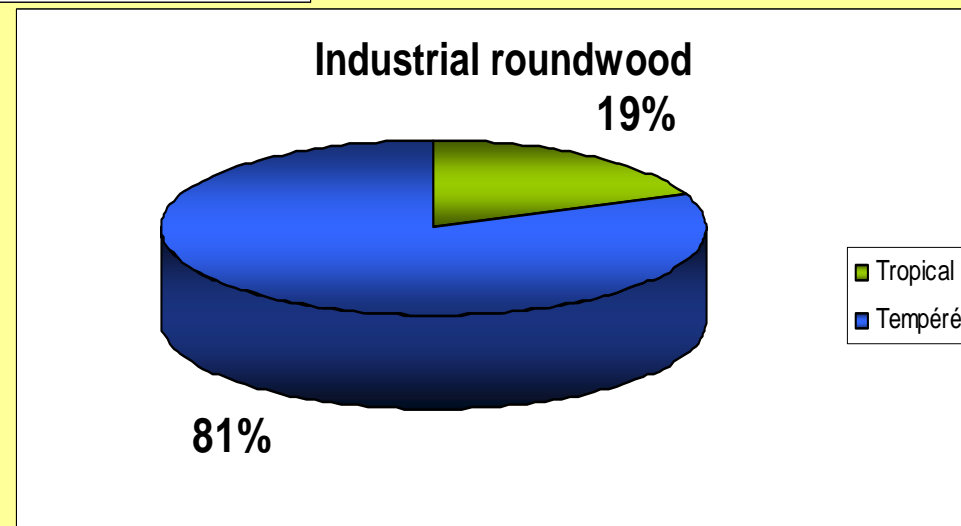
> 0,5 Temperate

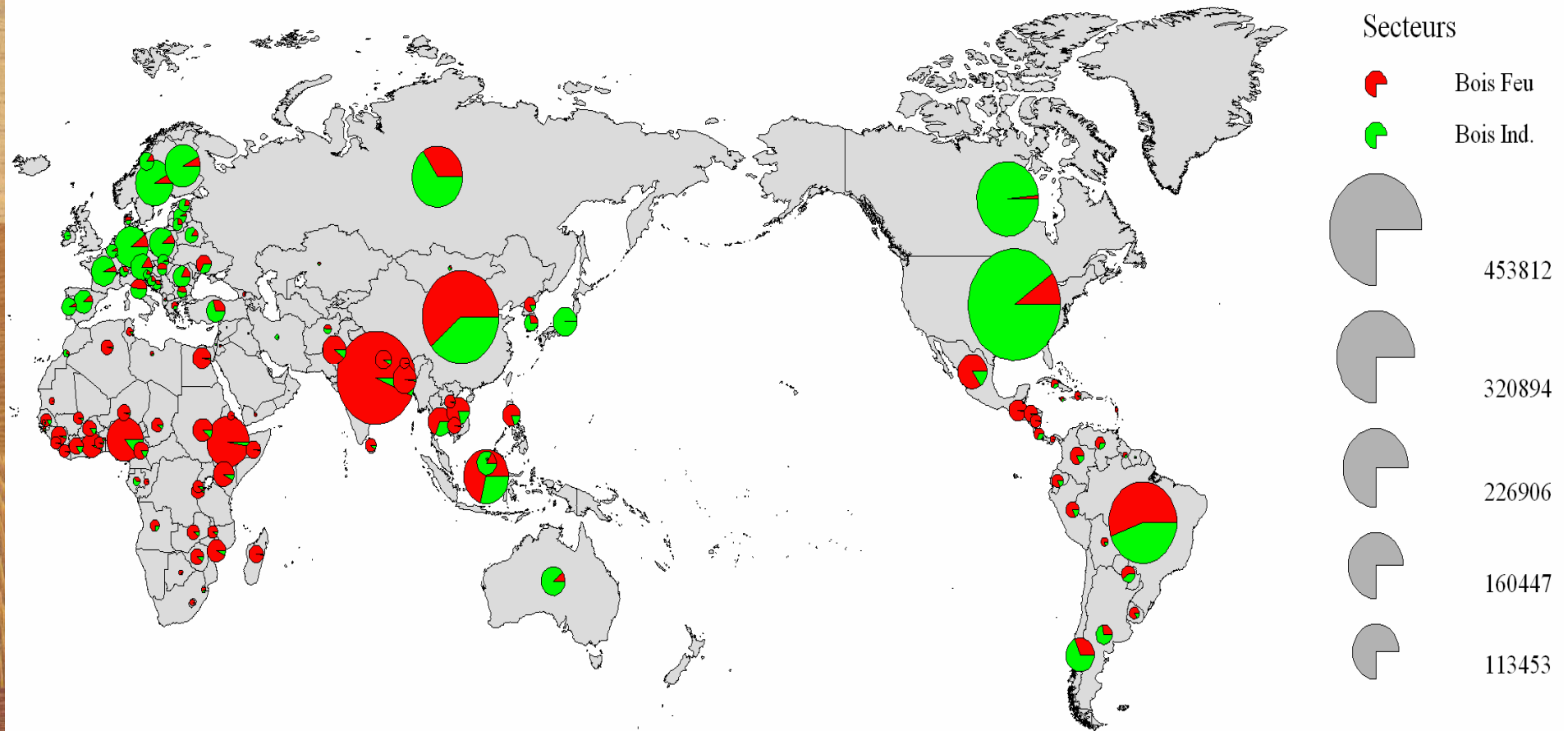
Industrial roundwood

1,6 billion de m³

> 0,3 Tropical (19%)

> 1,3 Temperate





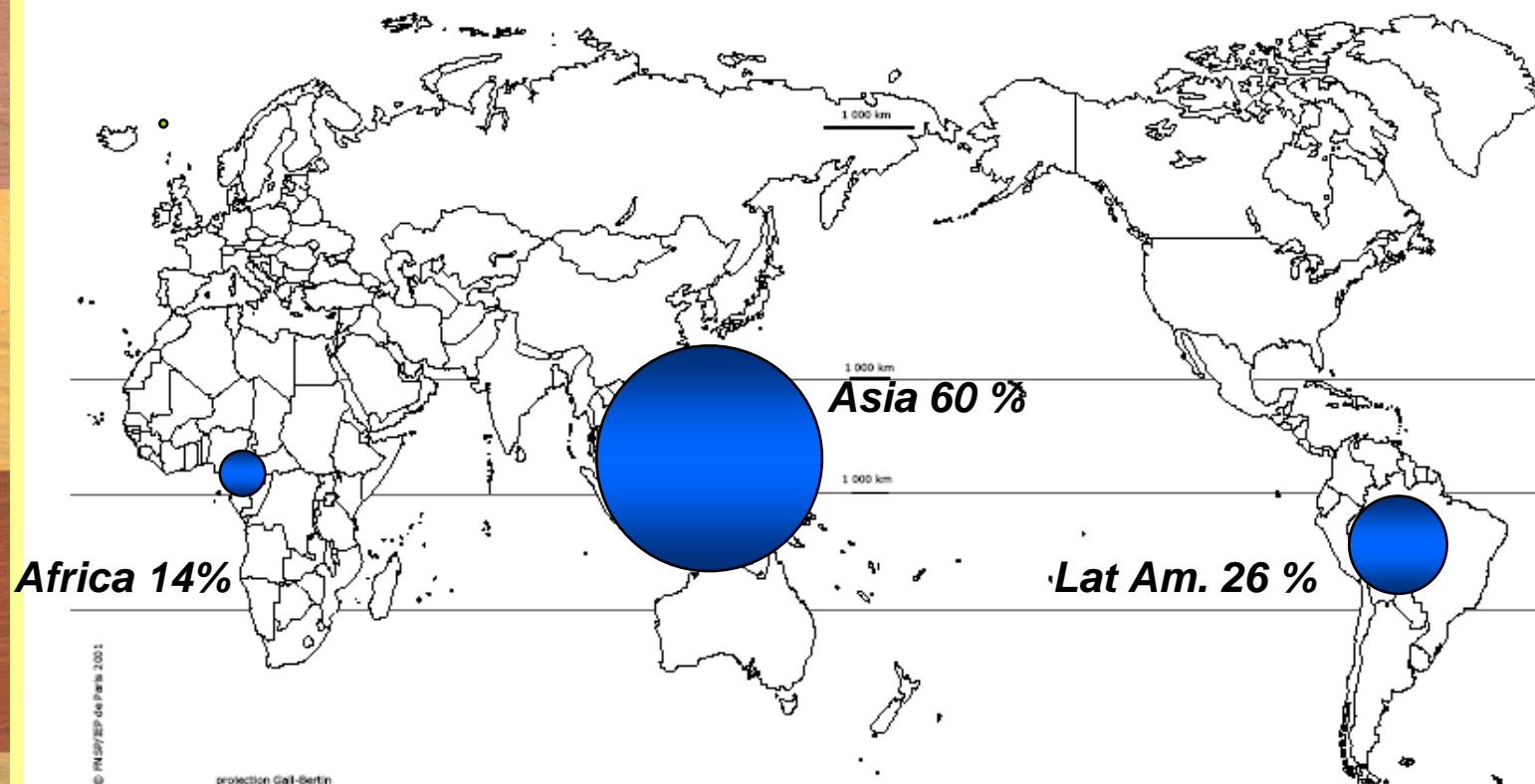
The tropical areas provide more than 70% of the world fuel wood, and less than 20% of the industrial roundwood.

Great differentiation of the markets

Industrial Roundwood



Industrial roundwood production / 2006

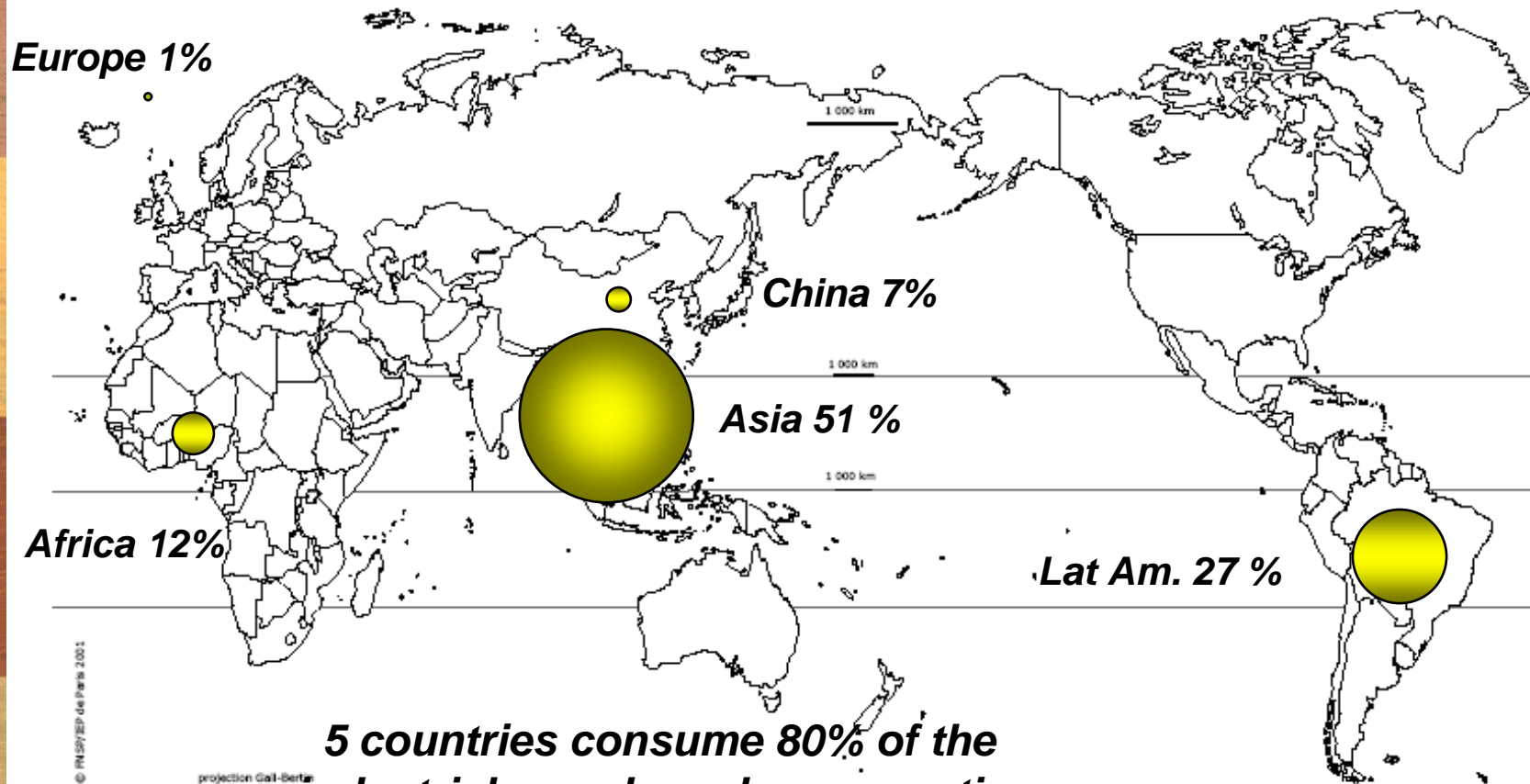


**5 countries produce 77% of the industrial roundwood production
Brasil, Malaysia, India, Indonesia, Nigeria**

137 million m³ (2006)

Source ITTO 2007

Industrial roundwood consumption



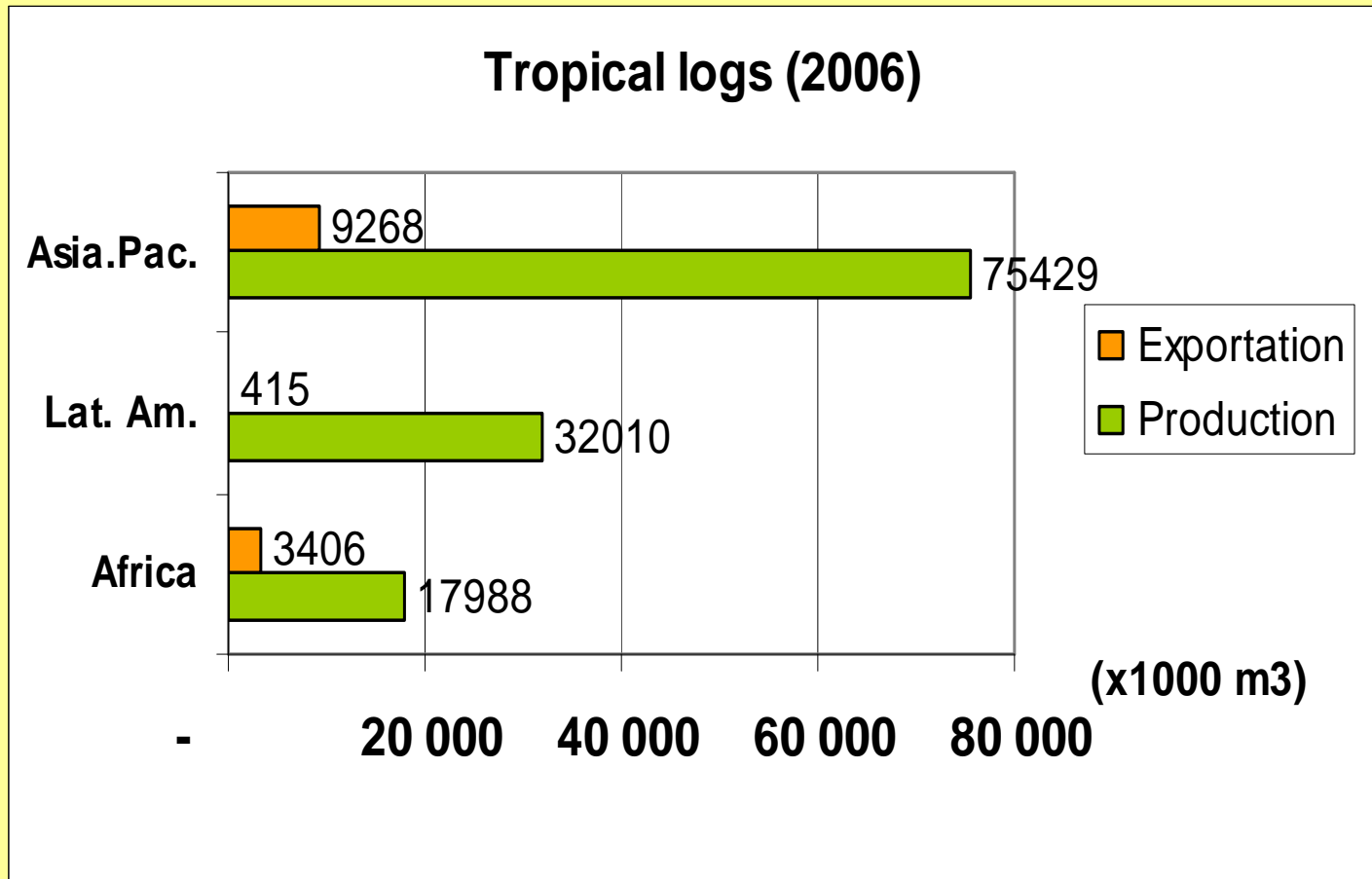
**5 countries consume 80% of the industrial roundwood consumption
Brazil, Malaysia, India, Indonesia, China**

© INIST/IEP de Paris 2001

projection Gall-Sertis

Source ITTO 2007

Industrial roundwood consumption

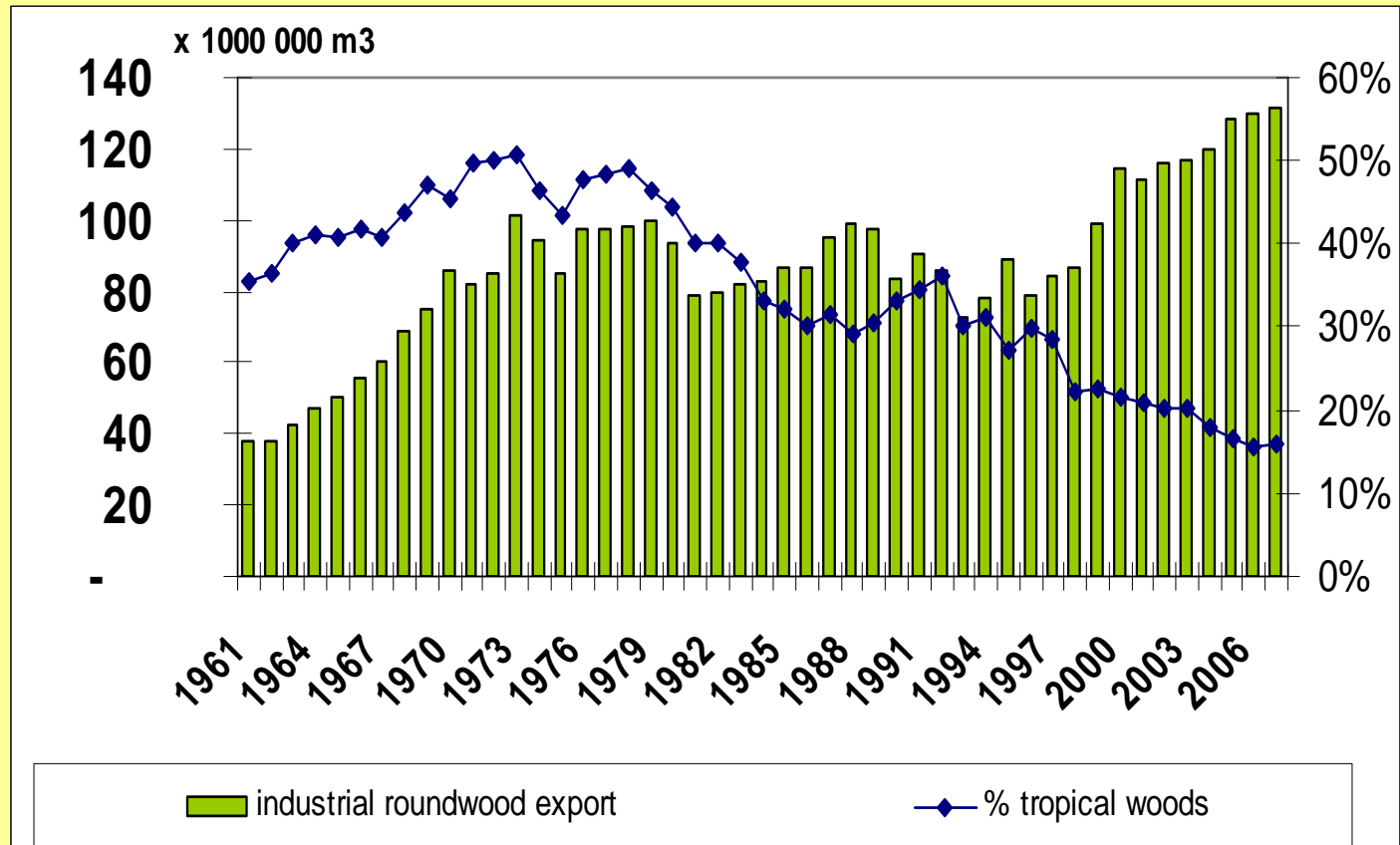


Asia dominates the production of tropical logs.

The logs production is mainly consumed by the producing countries

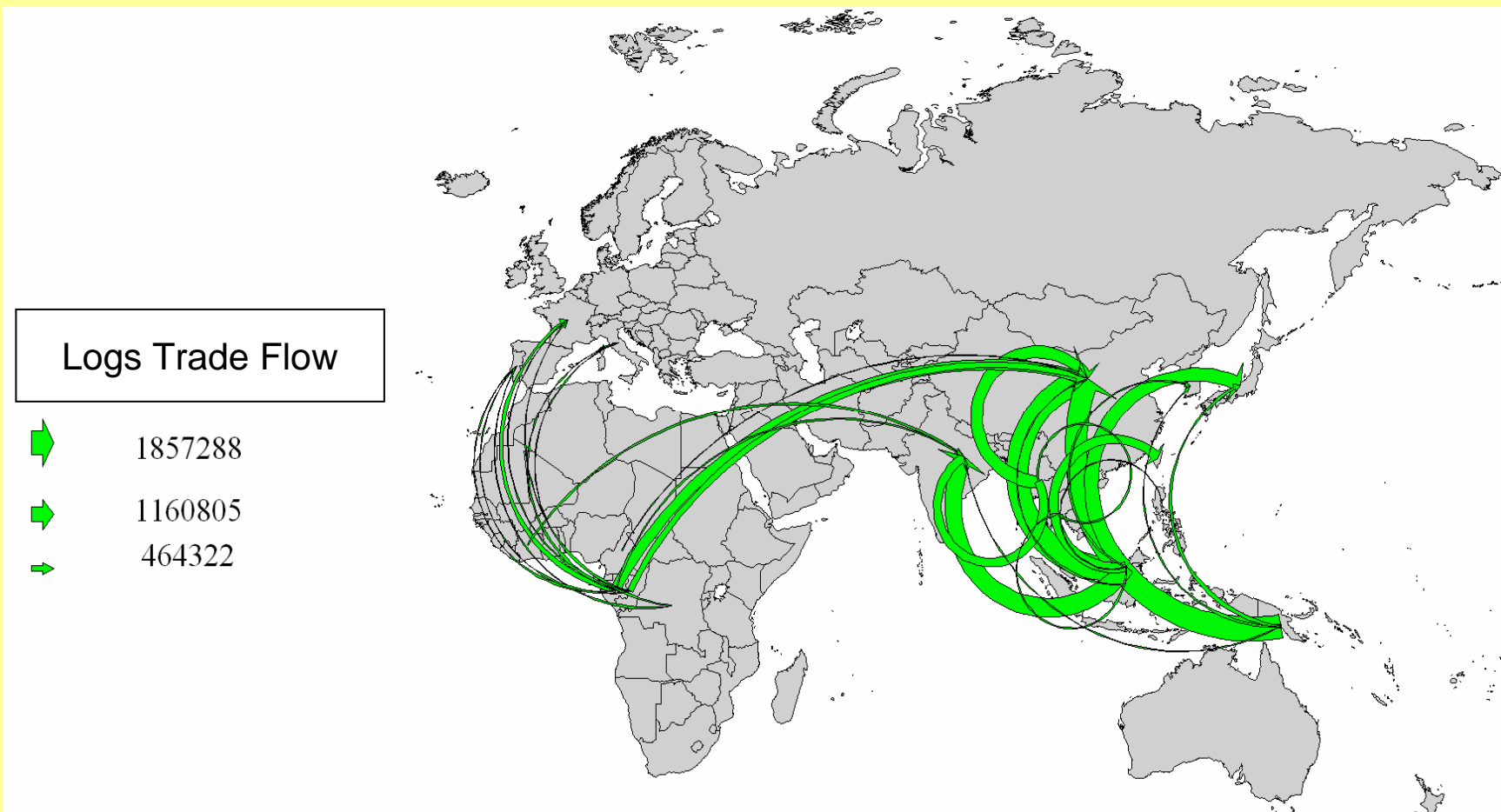
Industrial roundwood exportation

in the world, the proportion of tropical roundwood export decreases regularly since 1973



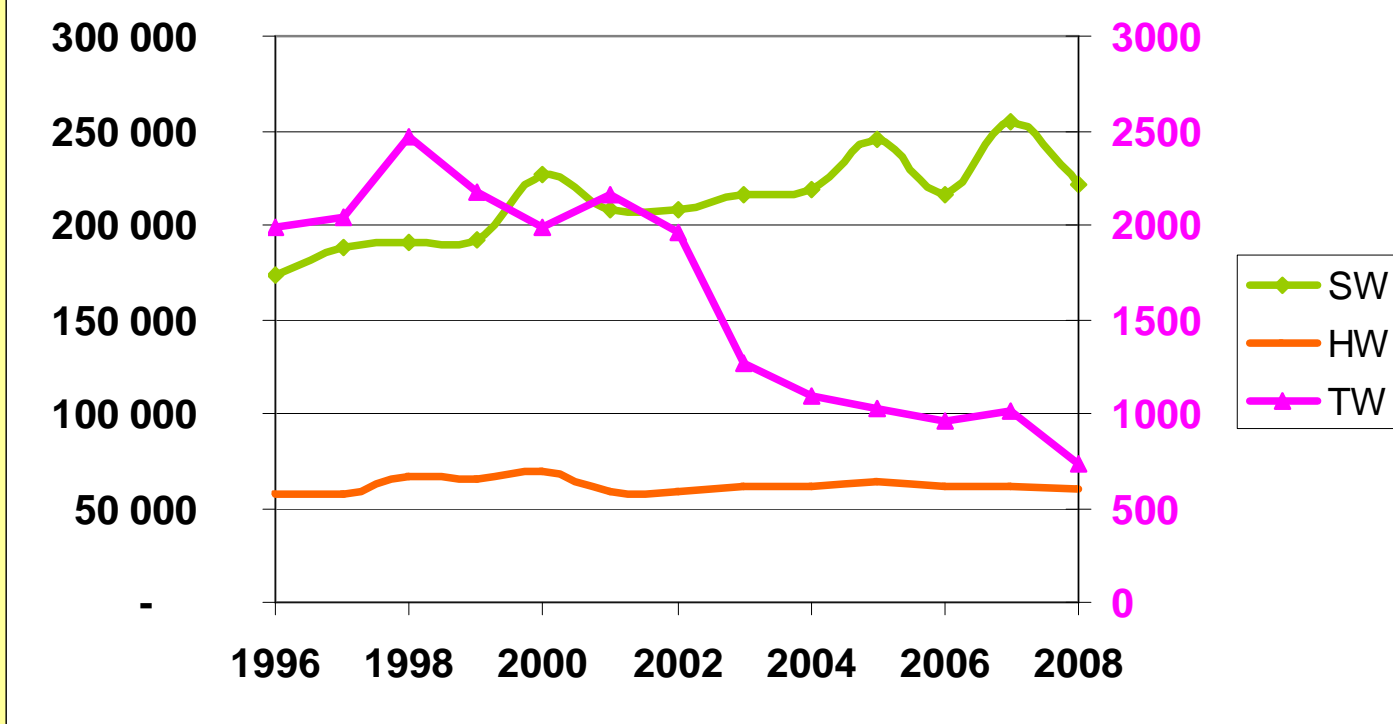
Source ITTO 2008:/ FAO
2006

Trade Flow of industrial roundwood from tropical countries (2006)





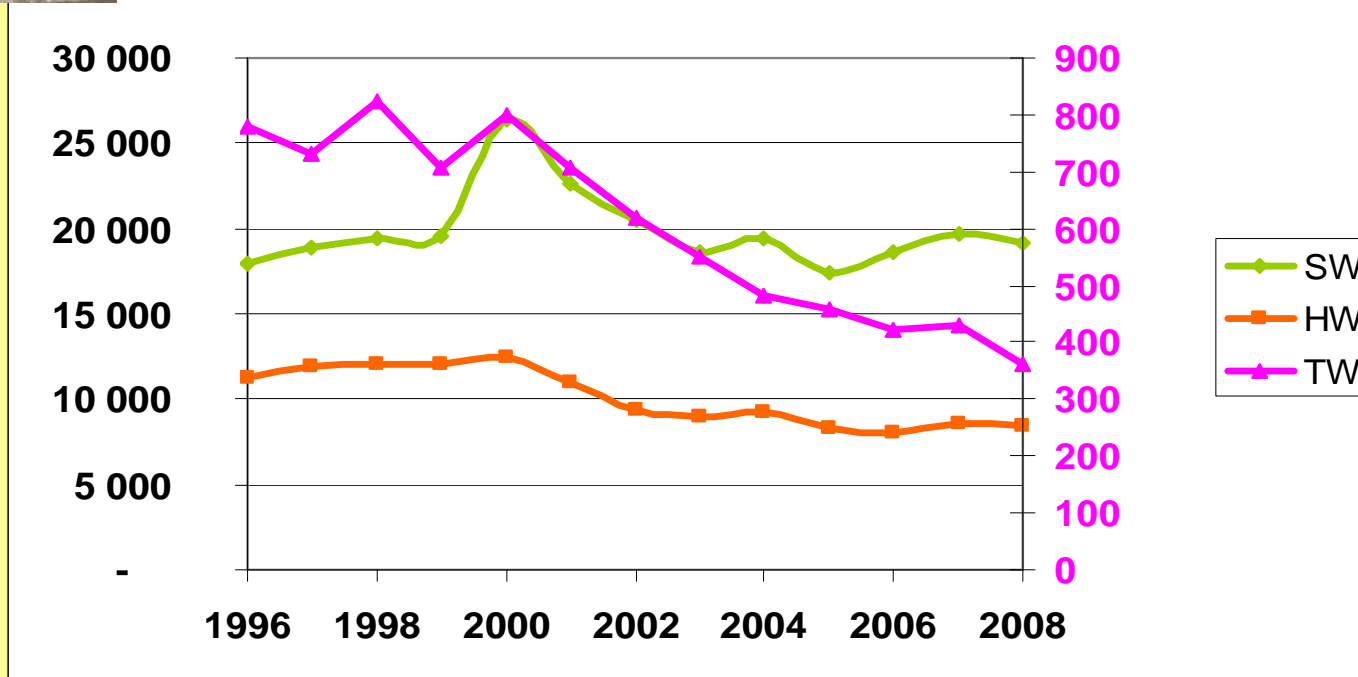
Logs consumption (Europe - 15)
(x 1000 M3)



Softwood ↗ Temperate hardwood → Tropical wood ↘



Logs consumption (France)
(x 1000 M3)

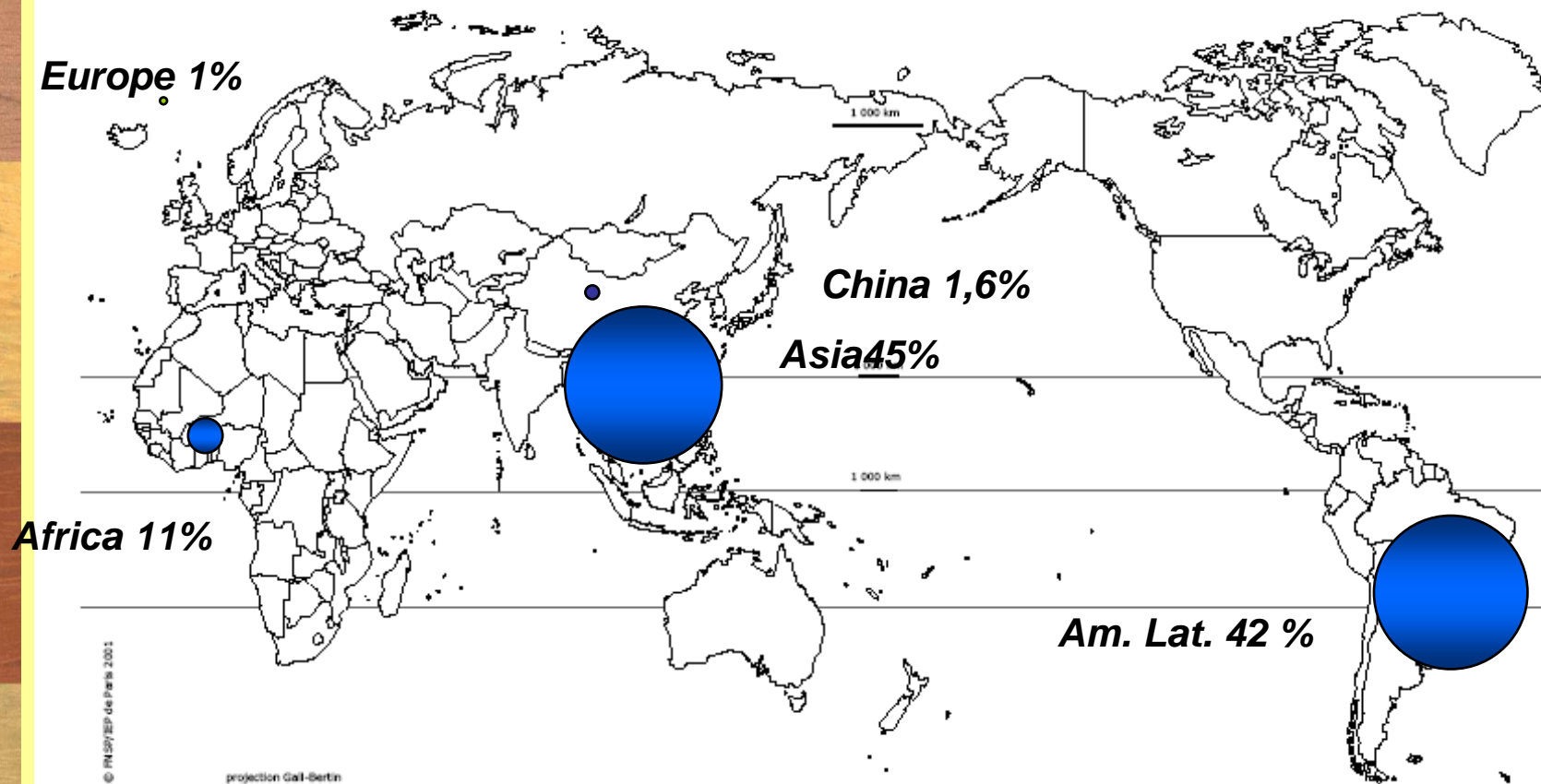


Softwood → Temperate hardwood → Tropical wood →

Sawnwood

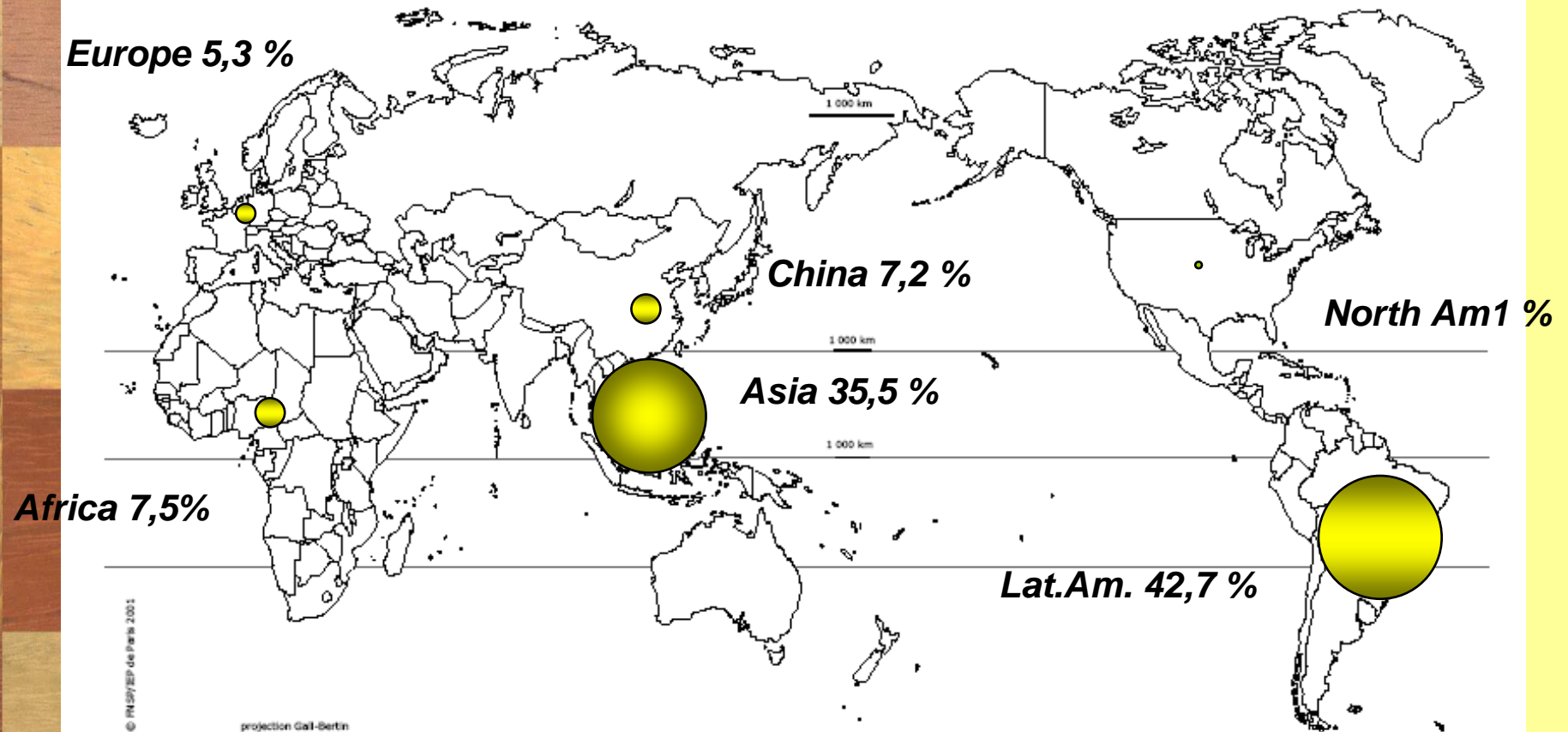


Production of tropical sawnwood



**5 countries produce 80% of the tropical sawnwood production
Brazil, Malaysia, India, Indonesia, Thailand**

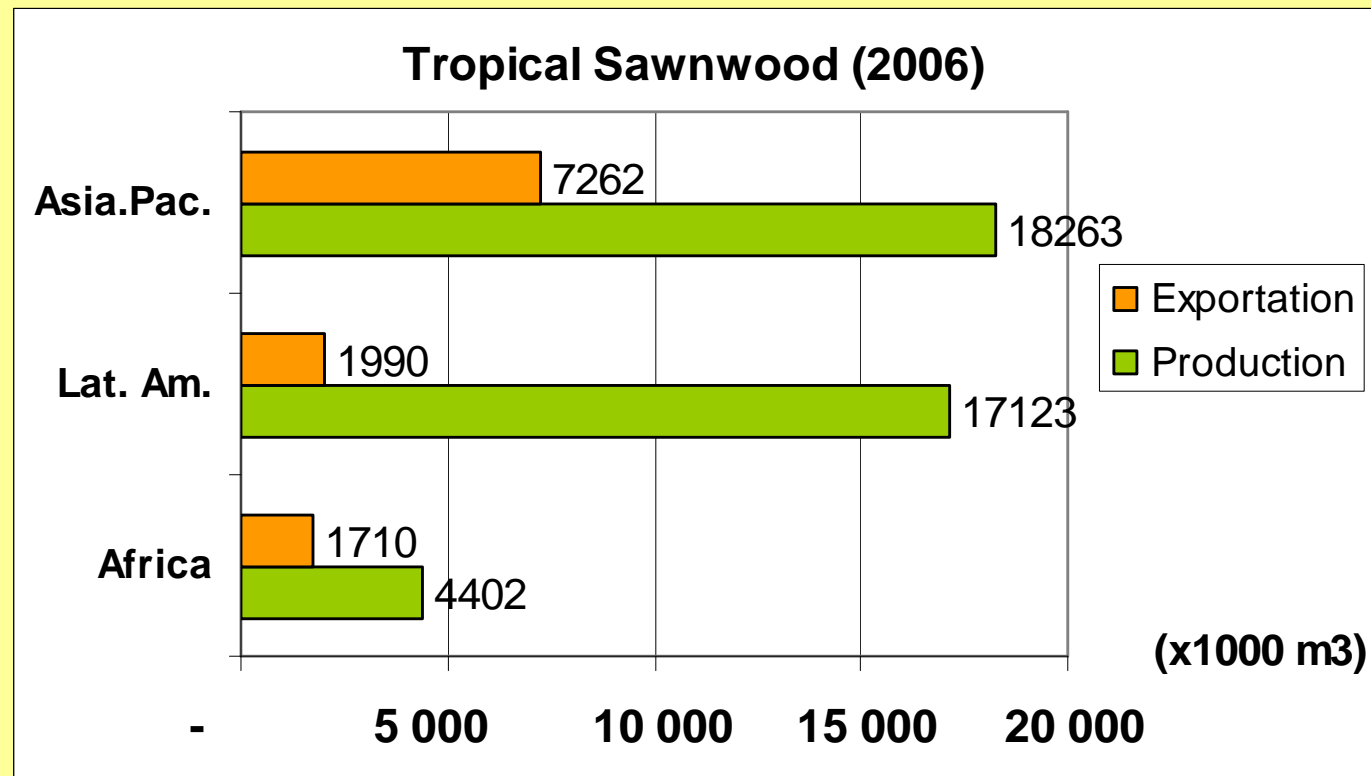
Tropical sawnwood consumption



**5 countries consume 72% of the tropical
sawnwood production
Brazil, Malaysia, India, Thailand, China**

Source ITTO 2007

Tropical Sawnwood consumption

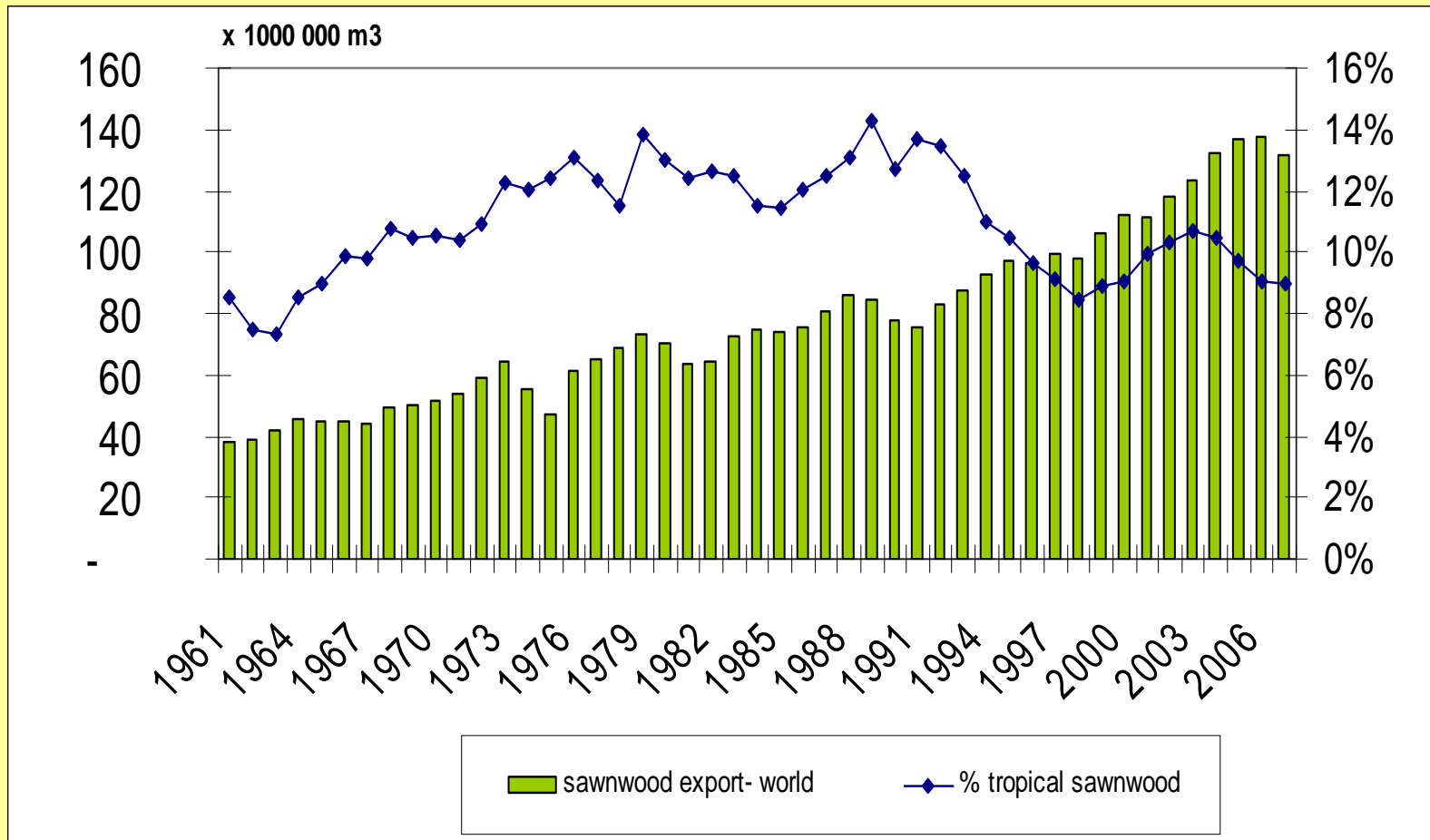


The Latin America consumes more sawnwoods than Asia
Asia exports approximately 40% of its sawings

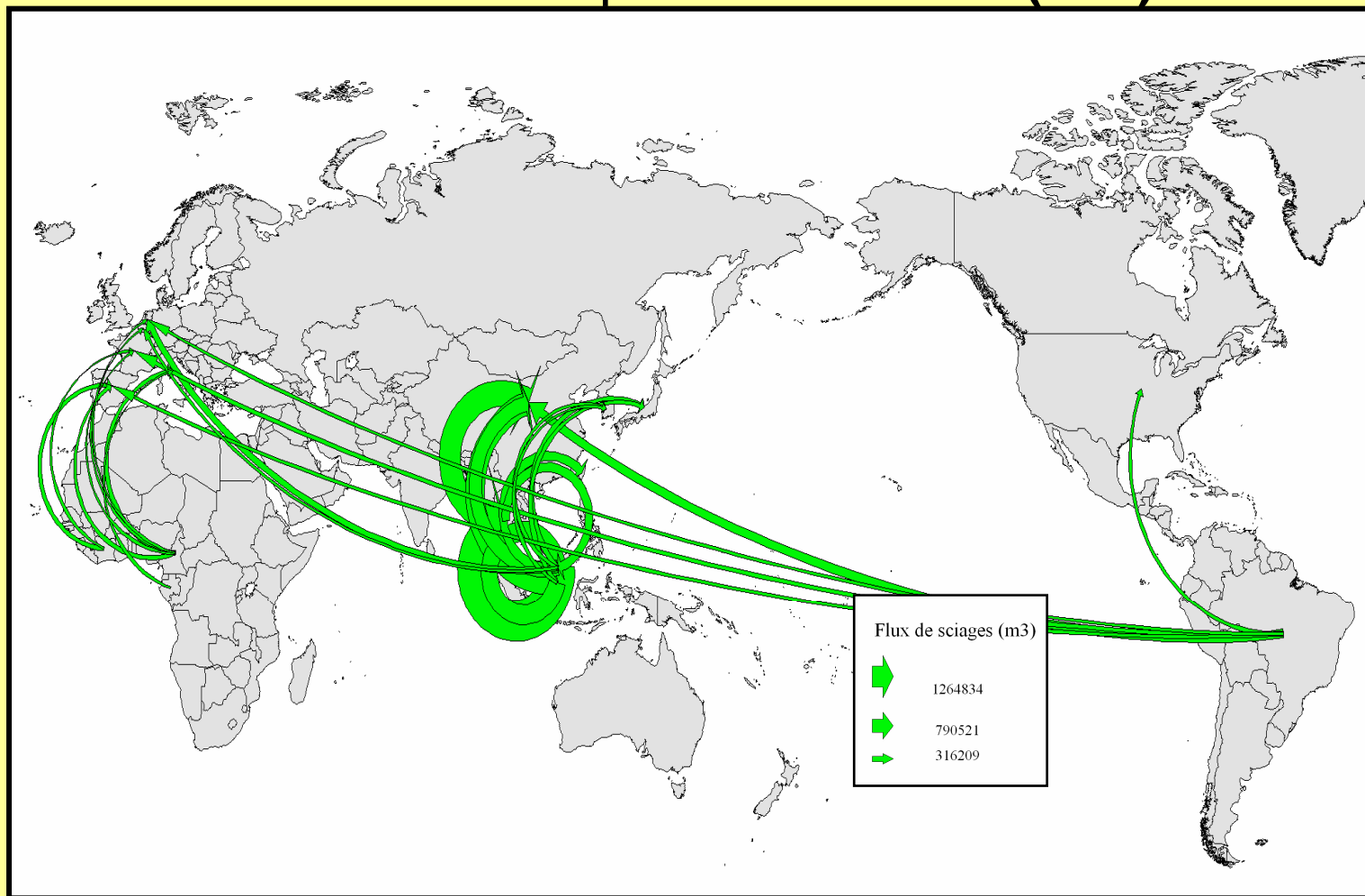
Source ITTO 2007

Exports of sawnwood increases in a world

Tropical wood exports represent a weak share (< 10% in 2007)

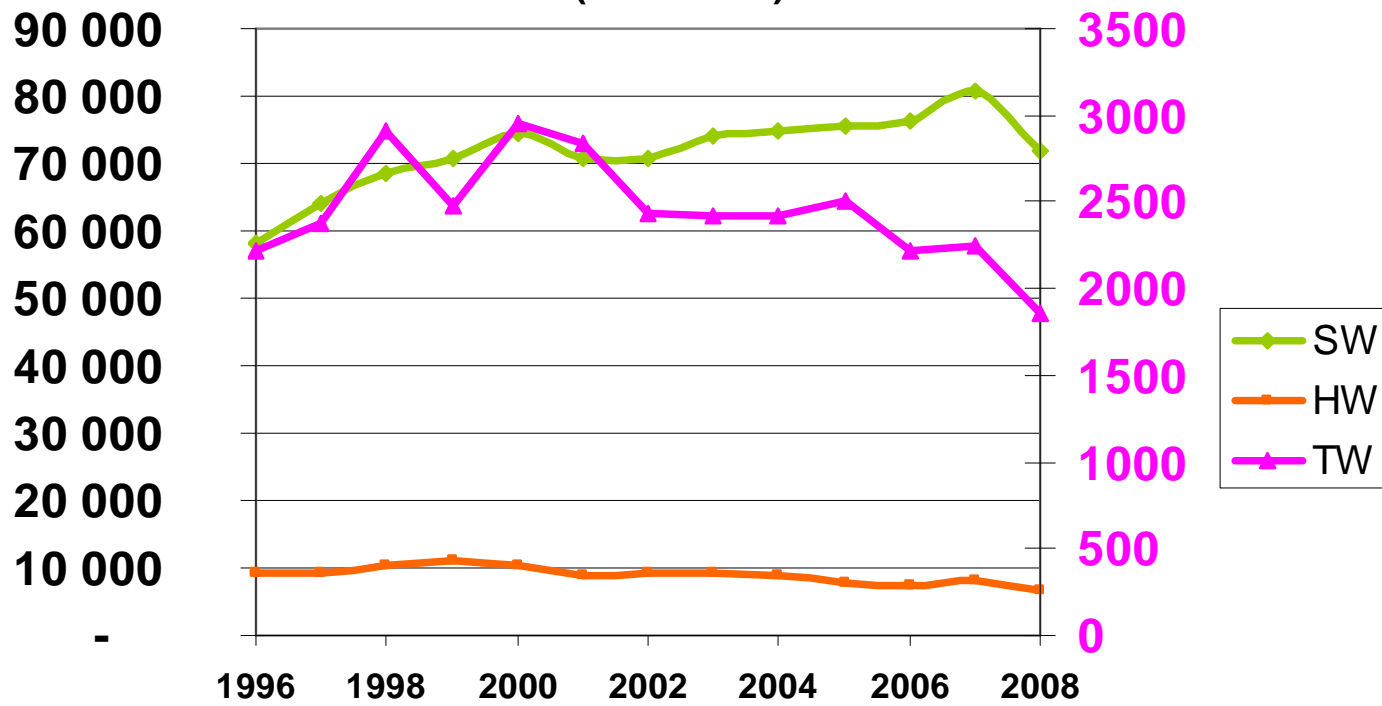


Trade Flow of tropical sawnwood (2005)





Sawnwood consumption (Europe - 15)
(x 1000 M3)



Softwood



Hardwood

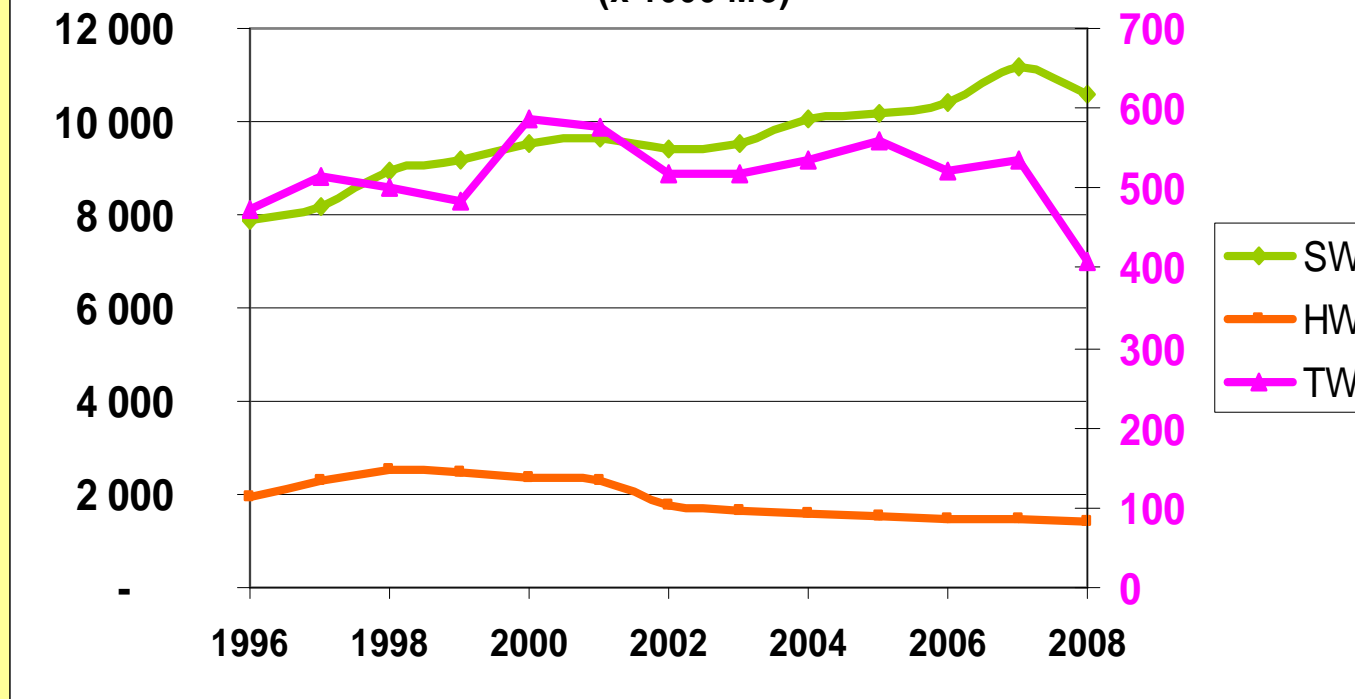


Tropical wood





Sawnwood consumption (France)
(x 1000 M3)



Softwood



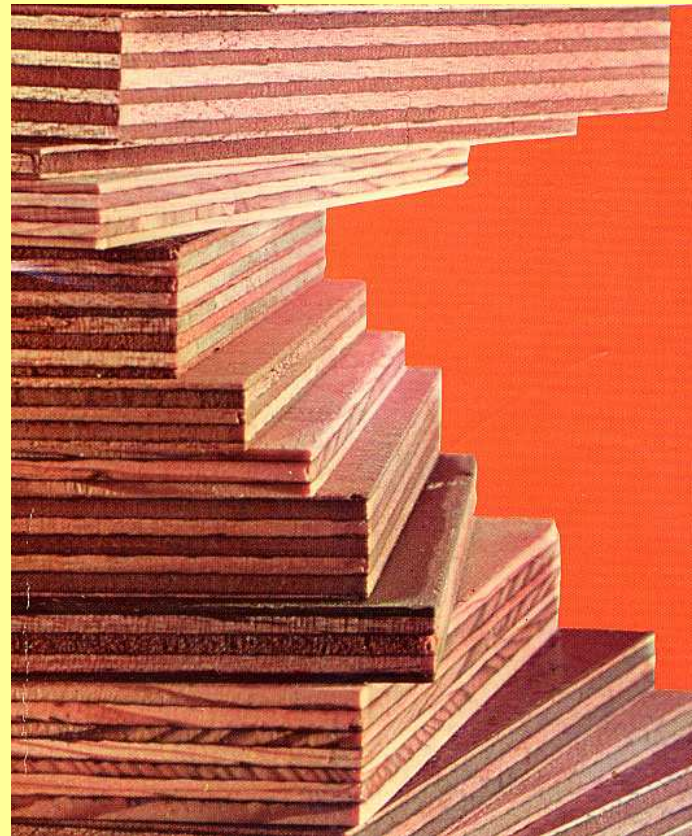
Hardwood



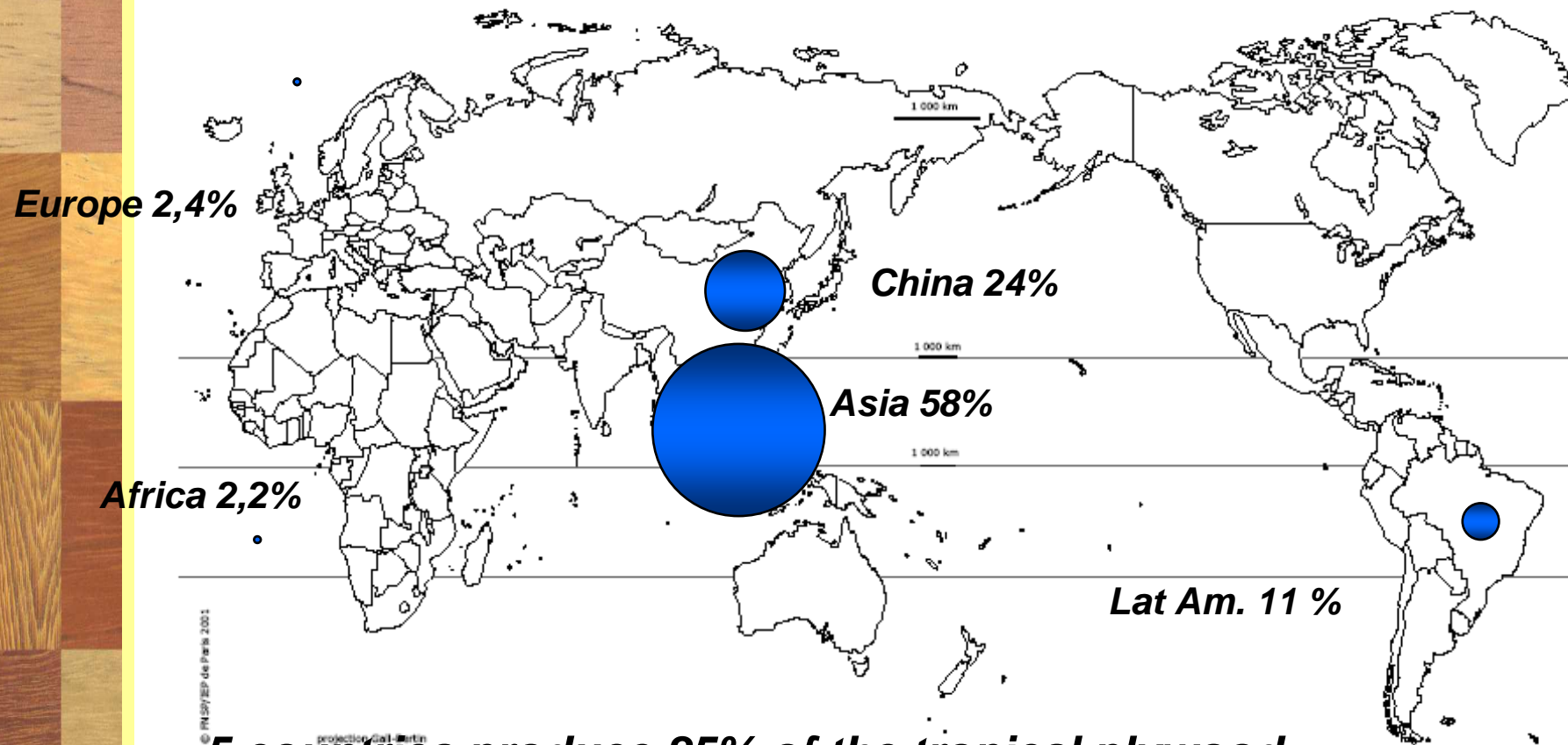
Tropical wood



Plywood



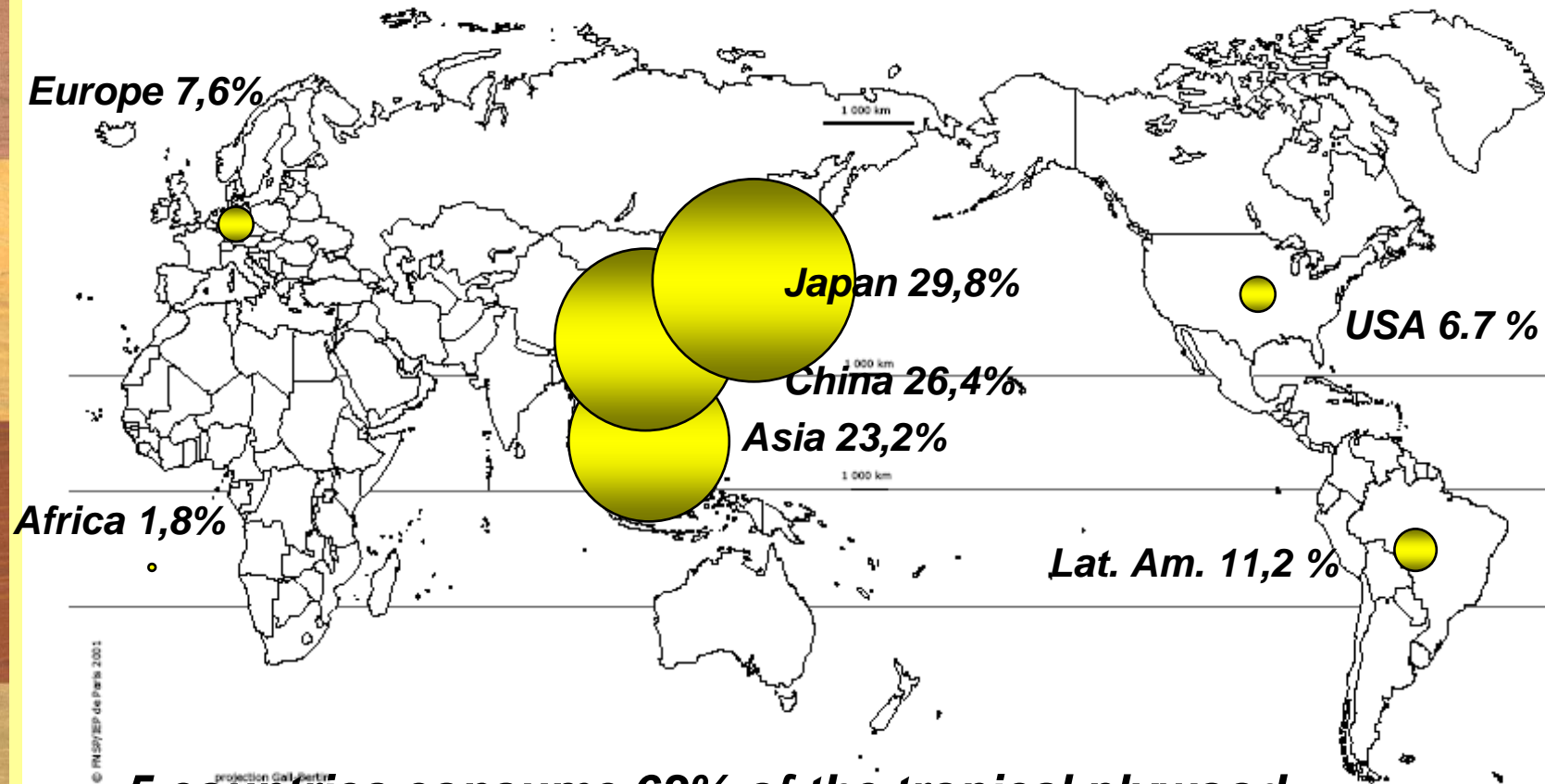
Tropical plywood production



5 countries produce 85% of the tropical plywood production
Malaysia,, Indonesia, China, India, Brazil

Source ITTO 2007

Tropical plywood consumption

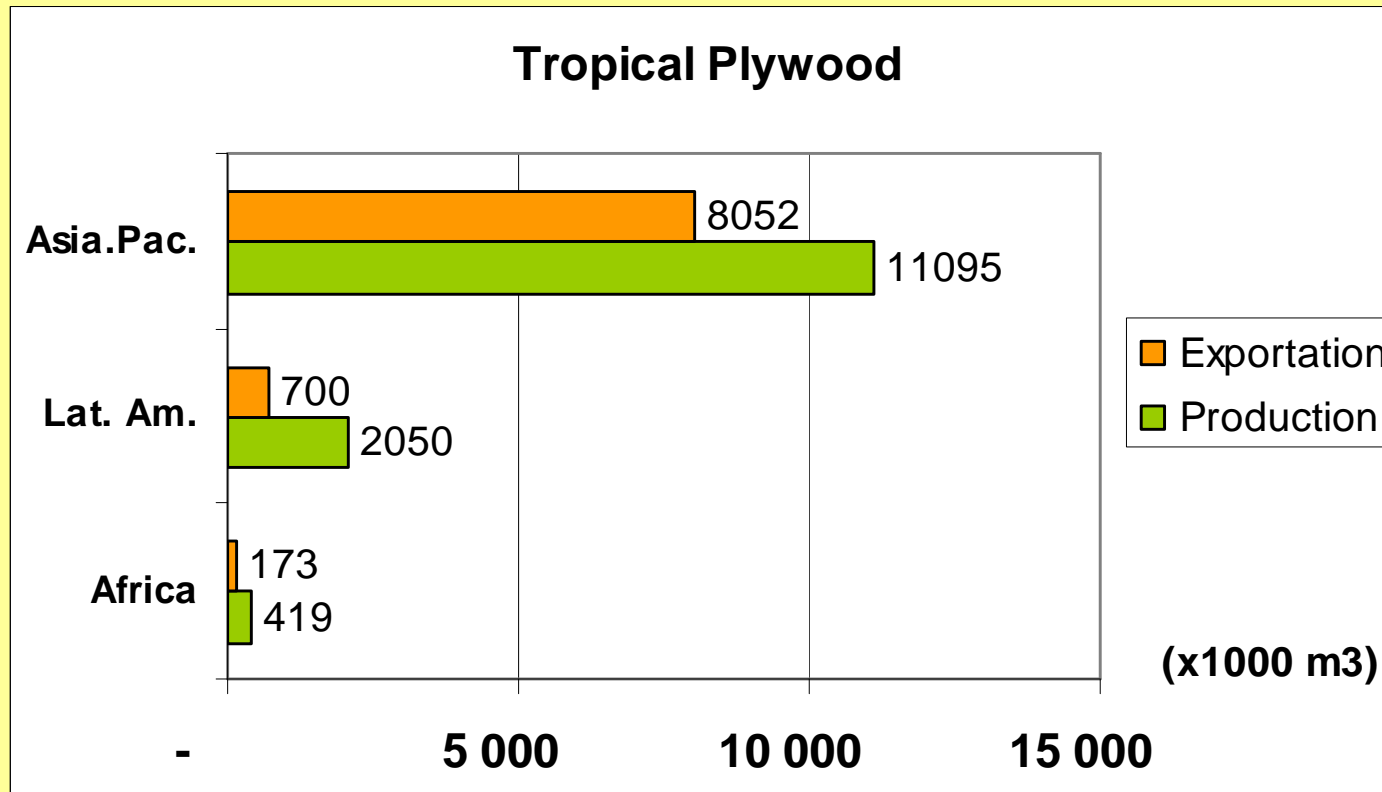


5 countries consume 63% of the tropical plywood production

Japan, China, India, Indonesia, USA

Source ITTO 2006

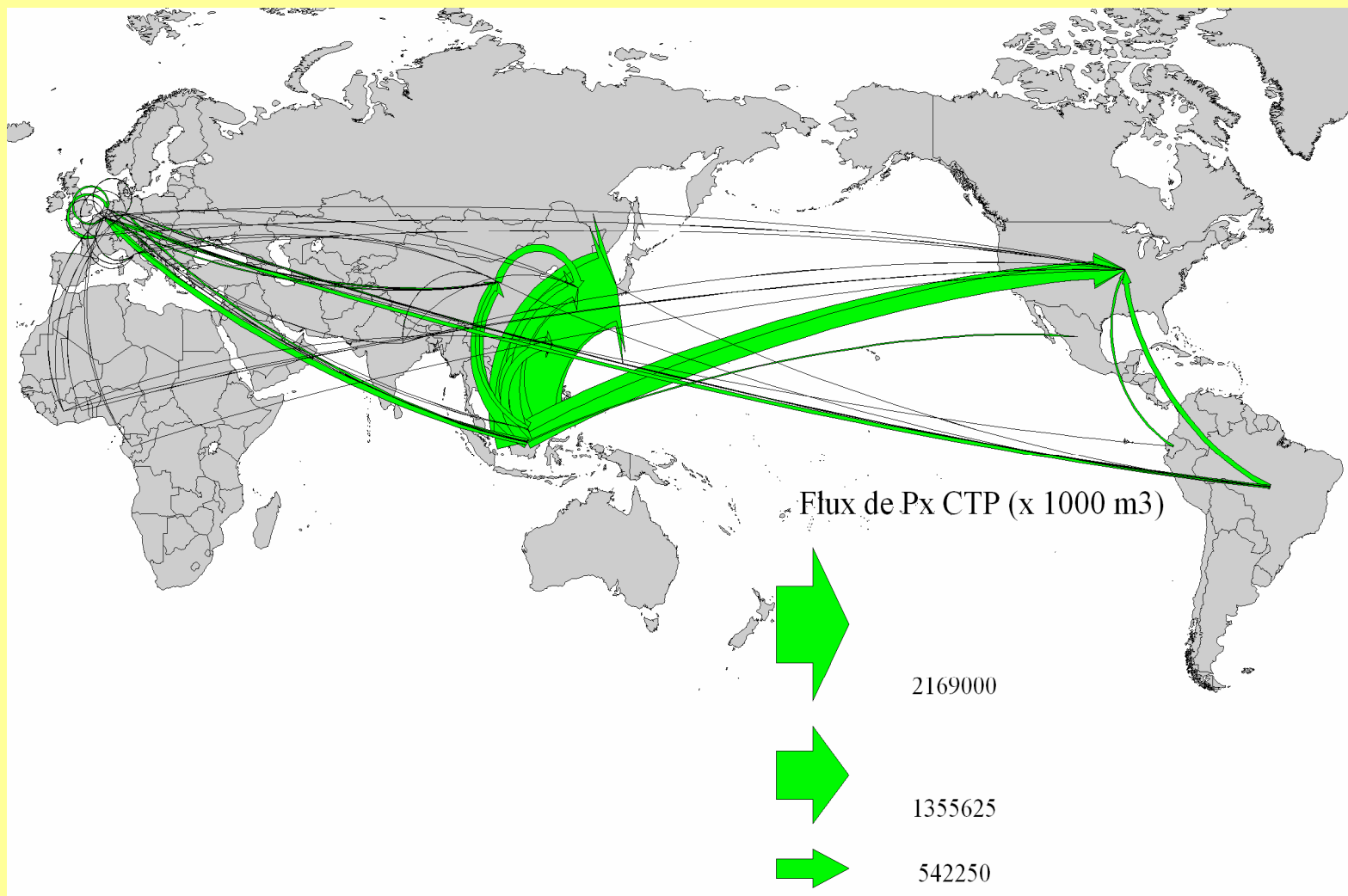
Tropical plywood consumption

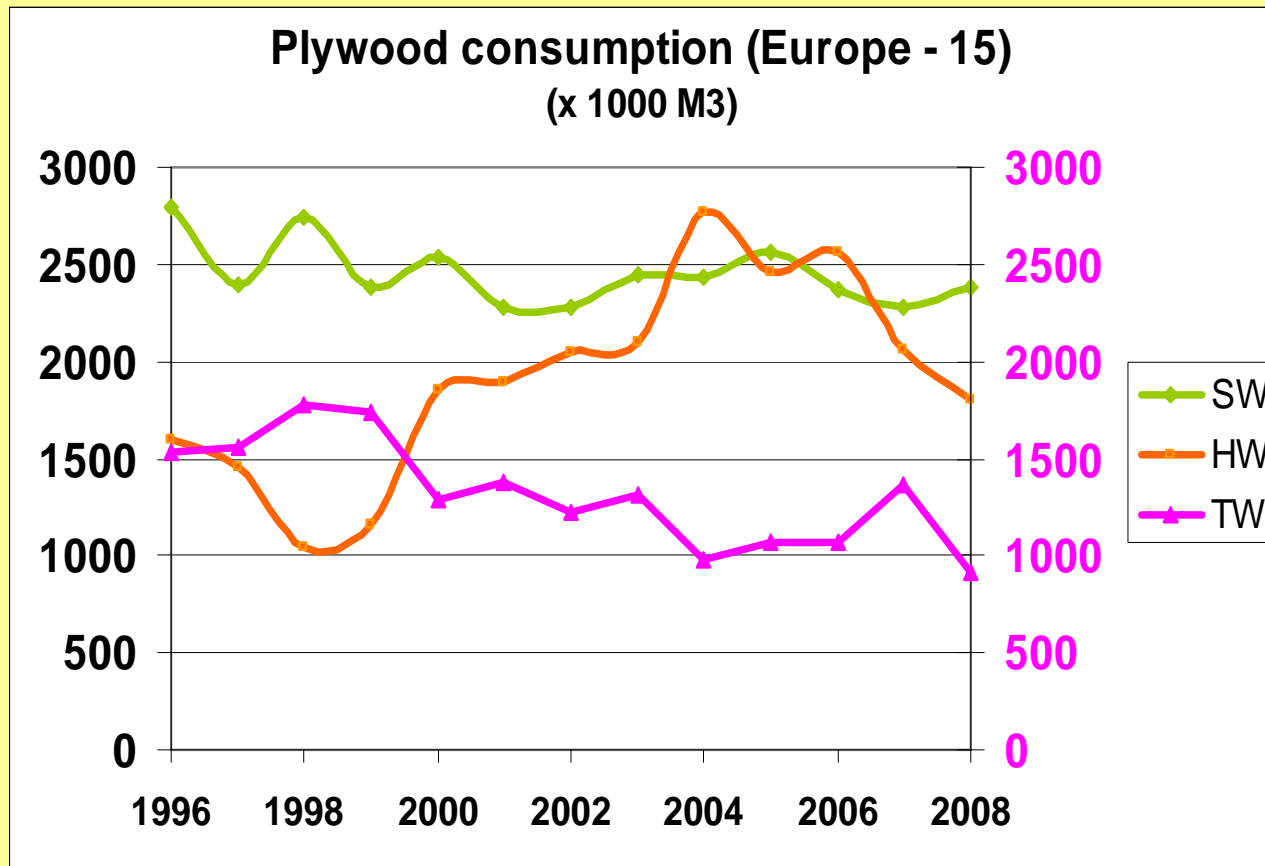
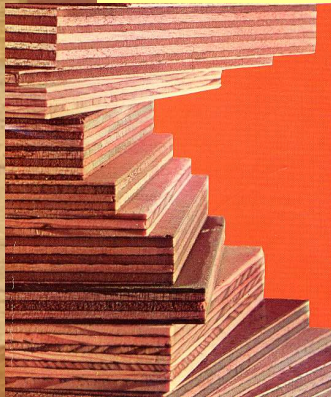


Asia dominates the production and exports of plywood

Source ITTO 2007

Trade flow of tropical plywood (2005)

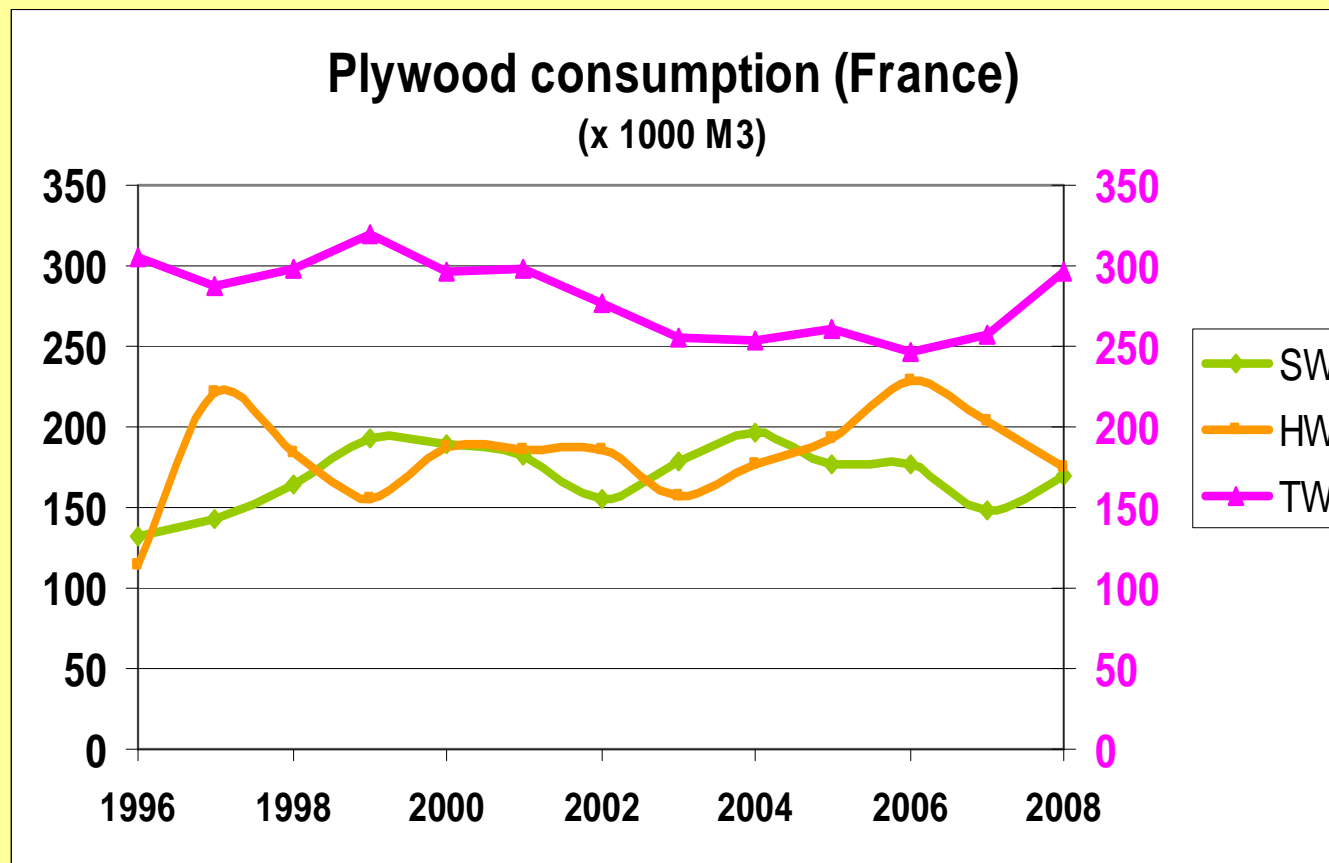
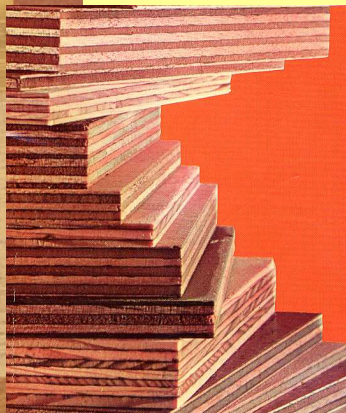




Softwood →

Hardwood →

Tropical wood →

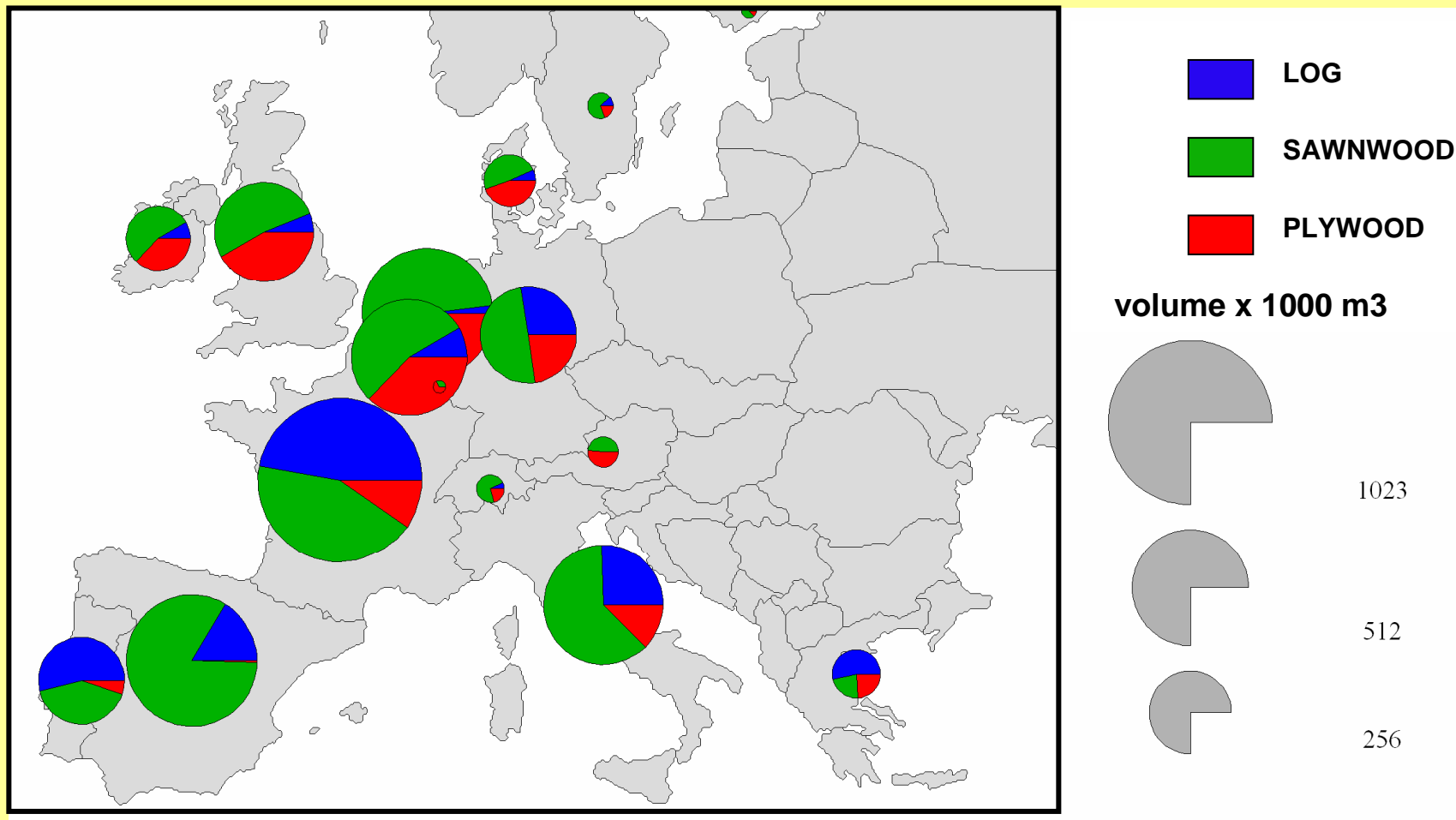


Softwood →

Hardwood →

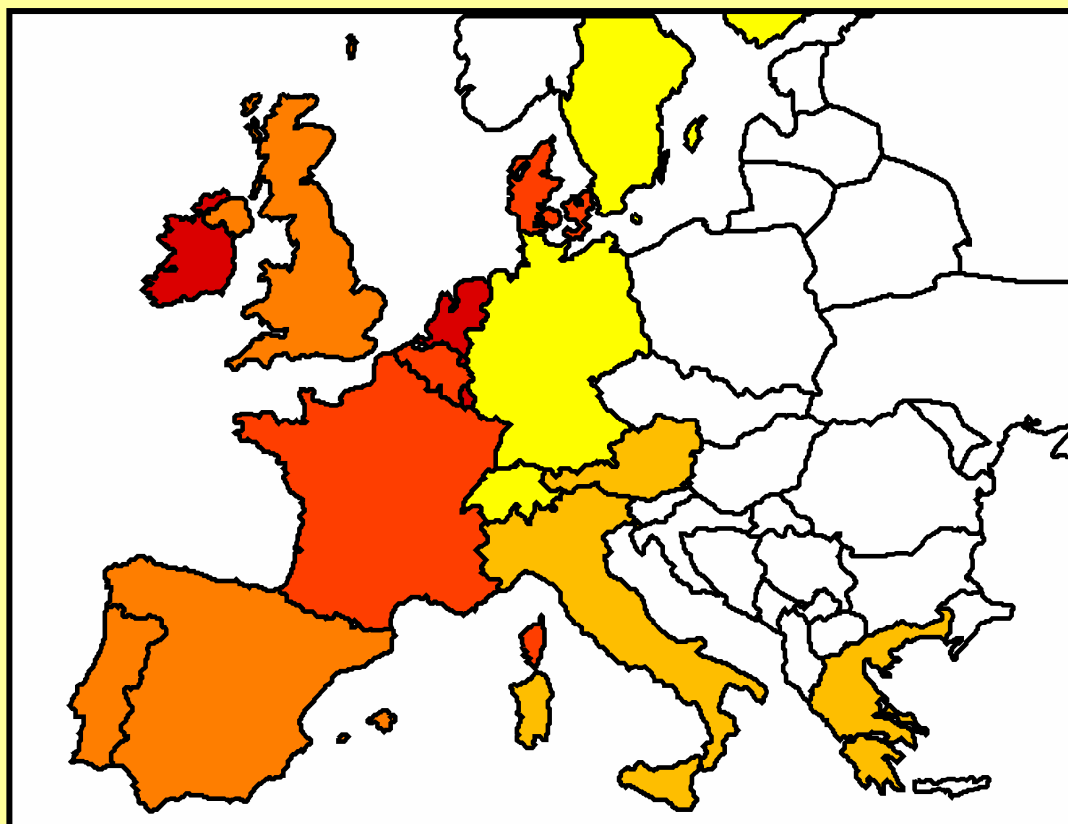
Tropical wood →

Tropical woods Importation in Europe 15 (2005)



Latin countries import mainly logs and sawnwood
Other countries import sawn wood and plywood

Tropical woods Consumption in Europe (2005)



RWE volume

Eire = 43 m³ / 1000 inhab.

NL = 32 m³/ 1000 inhab.

France = 13 m³/ 1000 inhab

RWE m³ / 1000 inhabitants

■	[	6e-1 ;	4 [
■	[	4 ;	6 [
■	[	6 ;	12 [
■	[	12 ;	27 [
■	[	27 ;	43]

Round wood equivalent - RWE volume

-Log / sawnwood = 1.8/ 1

-Log / plywood = 2.3/ 1



Secondary processed wood products

Secondary processed wood products

Moulding



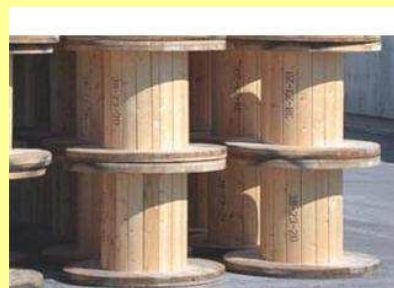
Builder's
woodwork



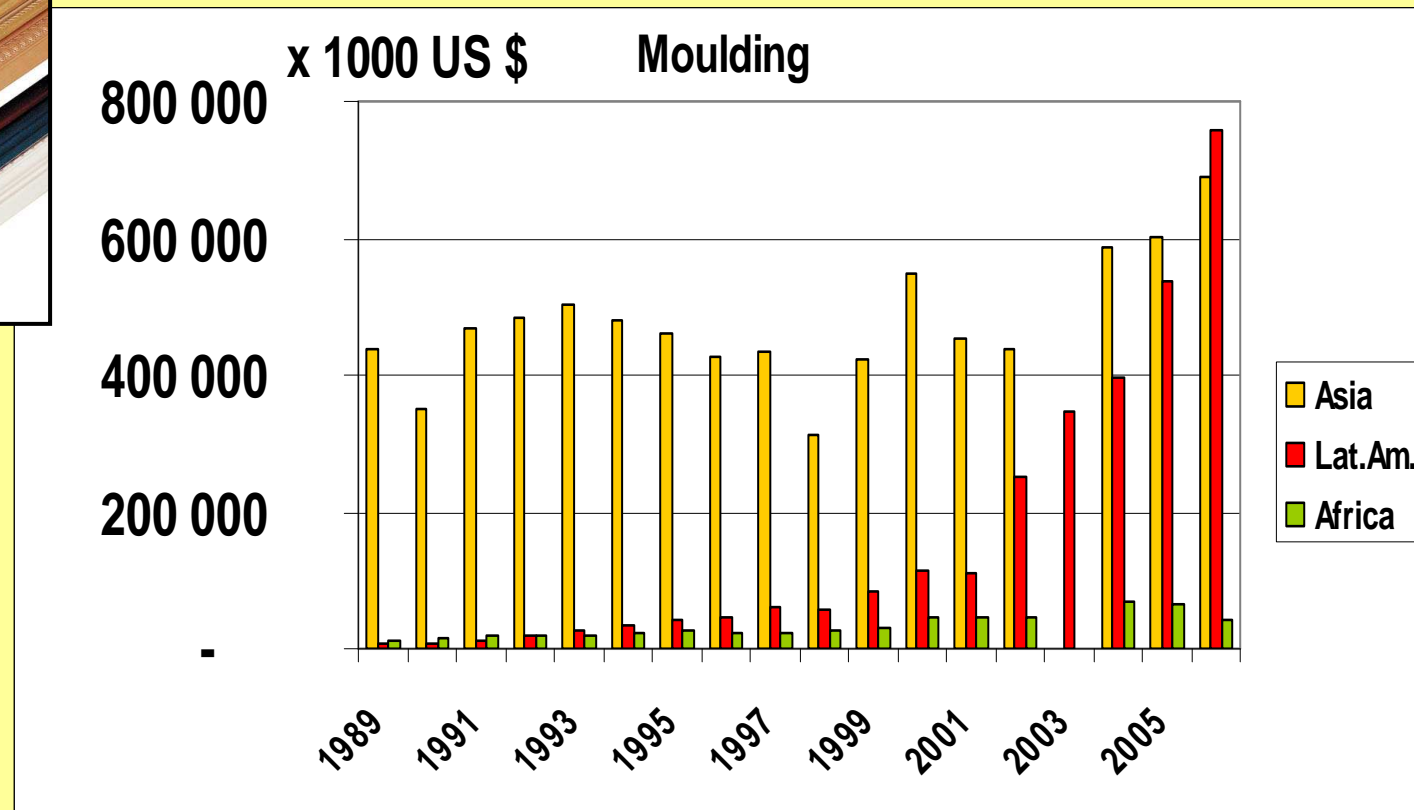
Furniture,...



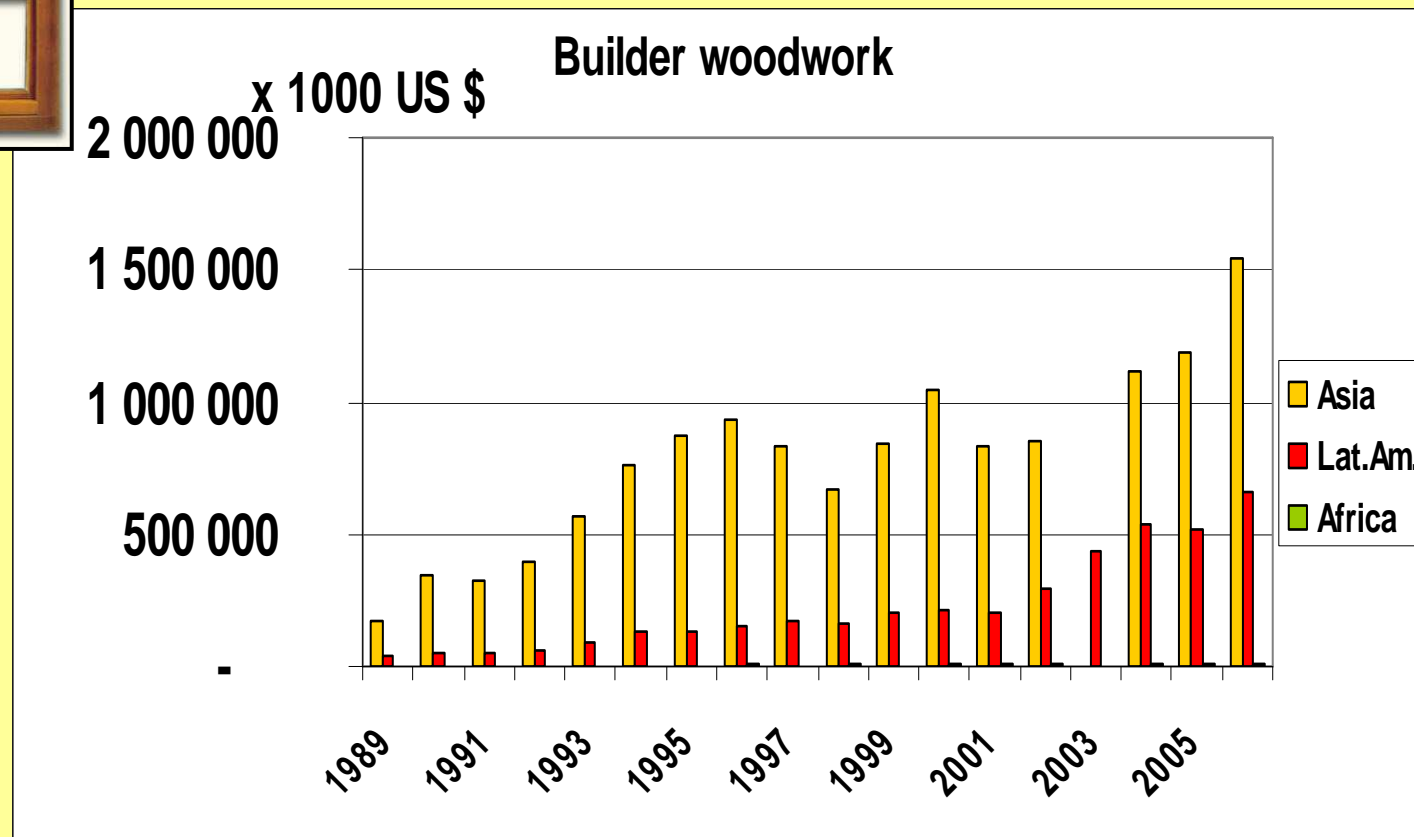
Other,...



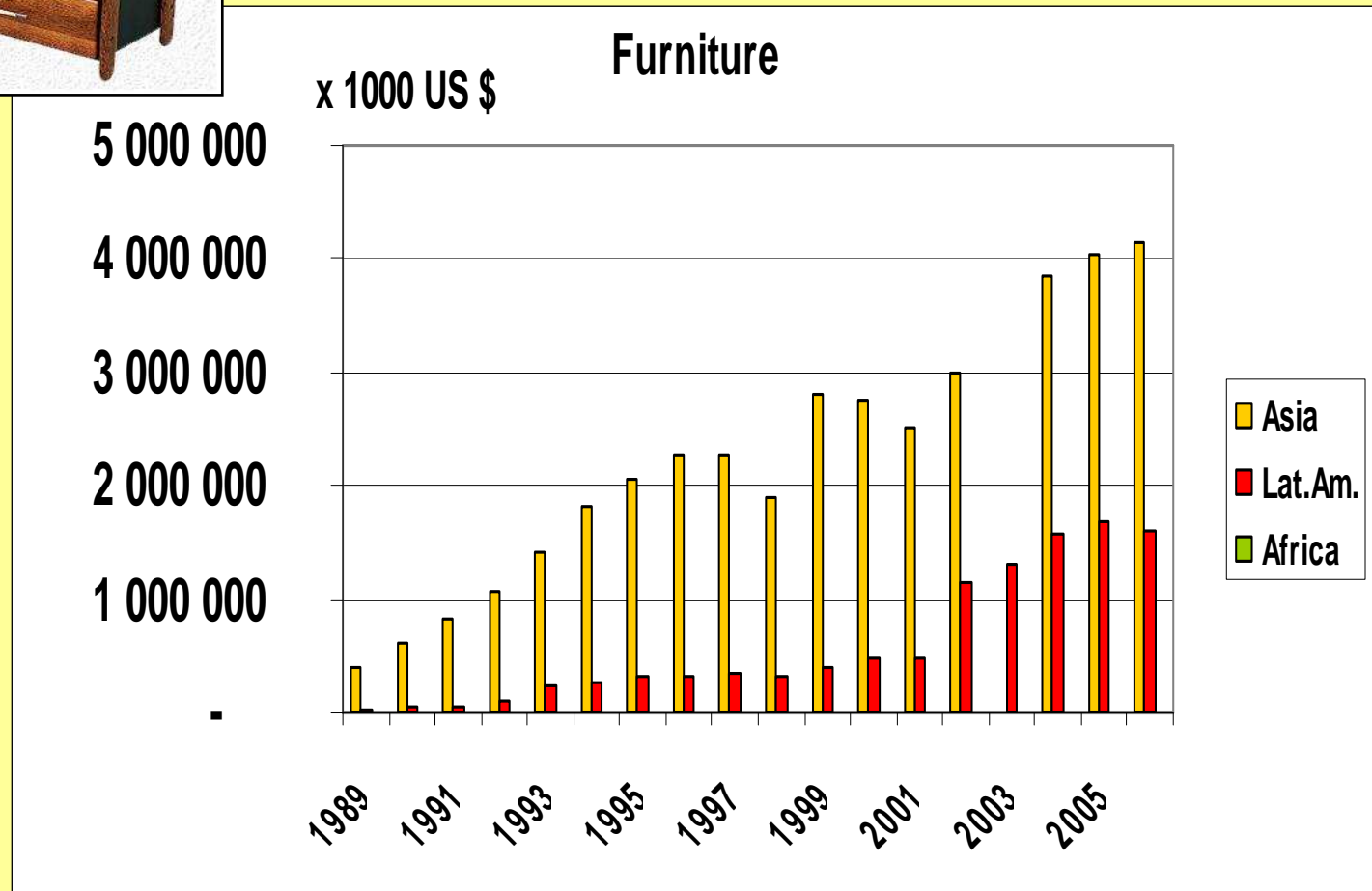
Exportation by area of production / Moulding



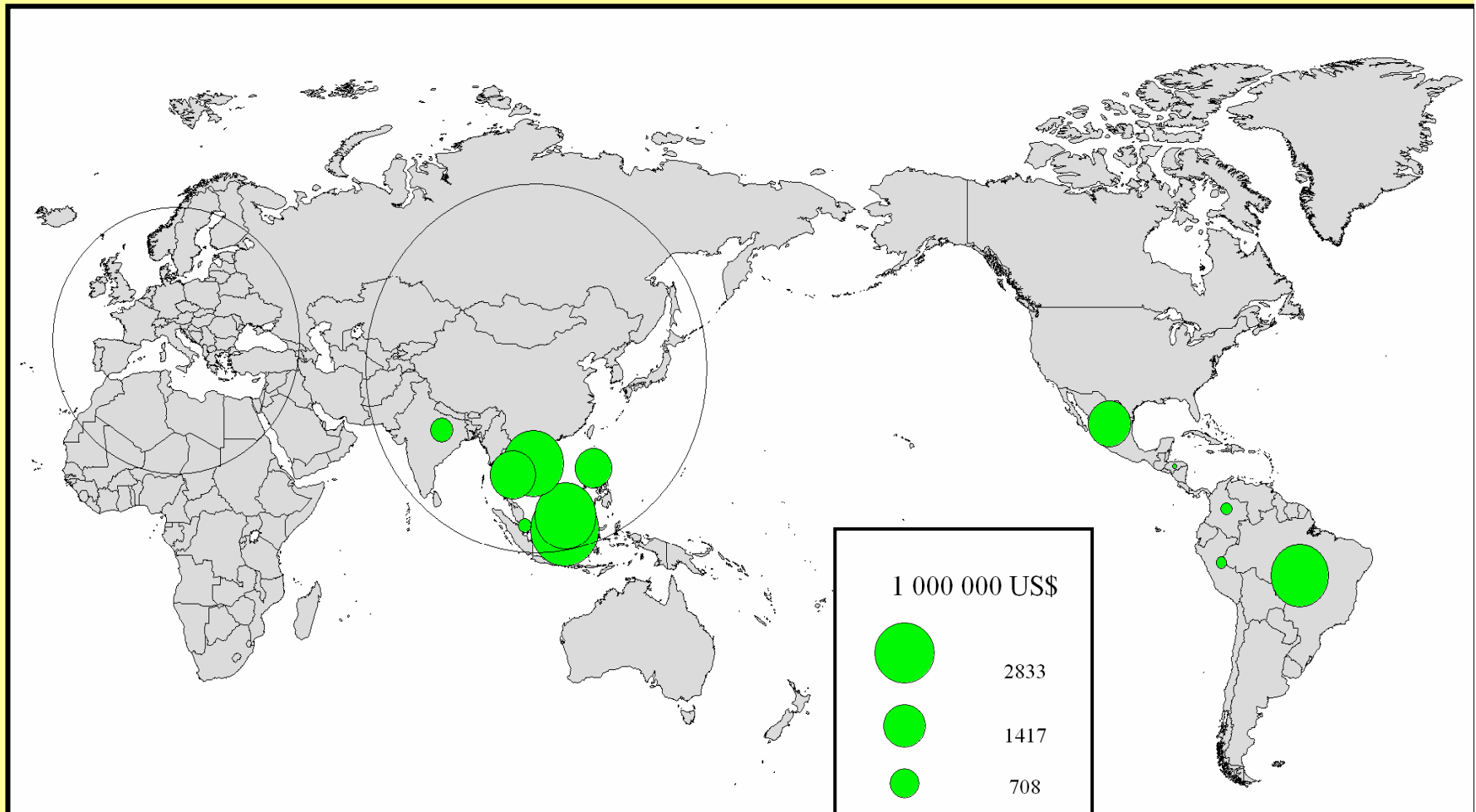
Exportation by area of production / Builder wood work



Exportation by area of production / Furniture



Major tropical exporters of *Secondary processed wood products* (ITTO 2006)



Trends on the tropical wood consumption in Europe,

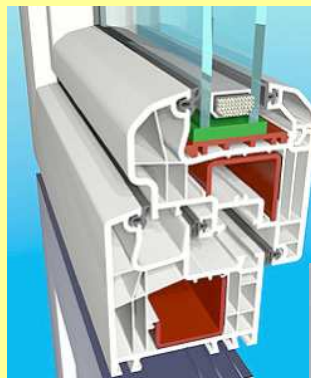
- In western Europe : Decrease of consumption of primary products (logs, sawnwood)
- Reduction of the offer of roundwood from producing countries
 - industrial logs export are limited or prohibited (*forestry code*)
 - many countries encourage the development of the further processing of wood
- Requirements of the European markets
 - CITES
 - Certification, traceability,
 - CE marking
 - Flegt (illegal logging,...)
 - Deforestation

Evolution from sawnwood consumption (EU 15 and France)

- Consumption growth of softwood to the detriment of hardwood and tropical woods,
- Consumption for construction and restoration with softwood timber and woodpanels,
- Wood from plantation (softwood) available on the market,
- Reduction of the consumption of hardwood,
 - price from HW are more expensive than SW
 - increase of the importation of furniture from other countries (Eastern Europe, Asia, South America)

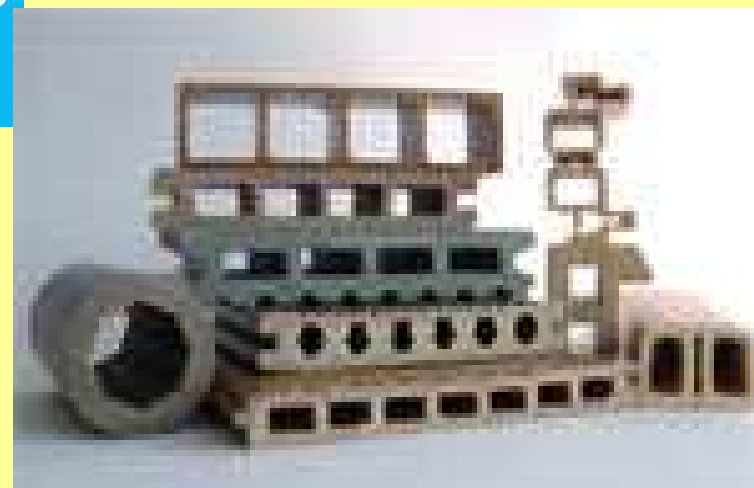
Hard Competition with the other materials :

- Plastic



- Metal

- Composite



In France today, less than 20% of windows are wooden
30 years ago, 80 % of windows were wooden

Trends in the future in Europe

Tropical species will be still employed

Specific use

- Naturally durable (no use of chemical products),
- Interesting mechanical and physical properties,
- Esthetic,

- Certified origin,

- Products from plantation,

Commercial exchanges with the emerging tropical countries
(Producers of secondary processed wood products)
Furniture, flooring,...

For more information

www.fao.org

www.itto.or.jp

www.unece.timber.org

www.wwf.fr

www.greenpeace.org

<http://www.fsc.org>

<http://www.pefc.org>

http://ec.europa.eu/development/body/theme/forest/index_en.ht

Thank You