Growing Trade of Wood and Paper Products

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Emerging Trade Measures in Timber Markets
Geneva, 23 March 2010
Thanks for preparations

I. Alex McCusker, Statistician, Timber Section, for UN Comtrade statistics

II. Felix Seidel, Research Assistant, Timber Section, for graphics
Presentation topics

I. Primary products trade
   ▪ 10 years, 1999-2008, by value in US$
   ▪ Roundwood, sawnwood, panels, pulp, paper

II. Secondary products trade
   ▪ Furniture, millwork, mouldings, etc.
   ▪ Value-added processing

III. Conclusions

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UNECE region = Europe + N. America + CIS

Source: Worldmapper
World shaped by population

Source: Worldmapper
As shaped by forest products exports

Sources: Worldmapper & FAOSTat, 2009
As shaped by forest products imports

Sources: Worldmapper & FAOStat, 2009
Global trade all products

Doubled in 6 years
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Global roundwood trade
(globally exports = imports in value and volume, but not in direction!)
N. American roundwood exports

USA increasing roundwood exports
African and Asian roundwood exports

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N. American exports

Housing crisis
US housing starts, 2002-2013

Source: APA – The Engineered Wood Association, 2009
European exports

2x in 10 years

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CIS exports, mainly Russia

4x in 10 years

Log export taxes

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Secondary-processed products exports

[Bar chart showing secondary-processed products exports from 1999 to 2008 for different regions.]

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China is the motor!

Based on domestic and imported roundwood
World’s largest exporter of wooden furniture and other secondary-processed products

5x in 10 years, no downturn in 2008
Pulp exports

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Paper products exports

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Sawn hardwood exports

![Bar chart showing sawn hardwood exports from 1999 to 2008 for different regions: Asia (yellow), Europe (blue), CIS (red), North America (green), Africa (brown), South & Central America (orange).]
Sawn softwood exports

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New UNECE/ FAO
Geneva Timber and Forest Discussion Paper:

“The importance of China’s forest products markets to the UNECE region”

Conclusions

- Global timber trade **doubled** over last decade
- Greatest increase in secondary-processed products
- Slowdown in 2008, 2009 with global economic crisis
- China became largest roundwood importer and largest secondary-processed products exporter
- Trade barriers distort markets
  - Export taxes, subsidies, tariff and non-tariff
  - Consequences for partners’ forest sector
How can we ever have a level playing field?!

Next presentation: “State of play and key challenges in the timber markets” by Mr. Marc Bacchetta, WTO