



China Trade Trends

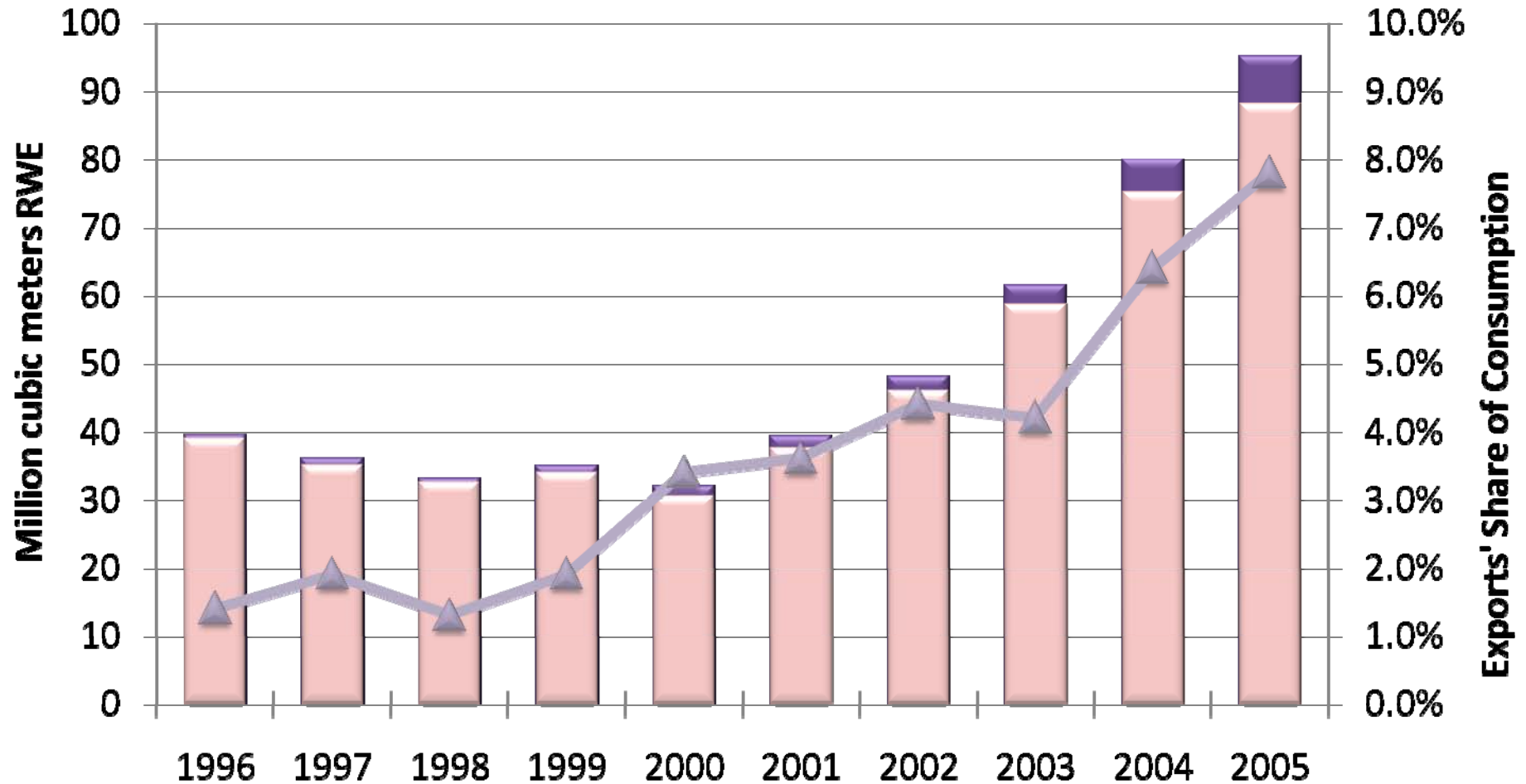
Kerstin Canby



Brian Stafford &
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Consultants to the Pulp & Paper Industry



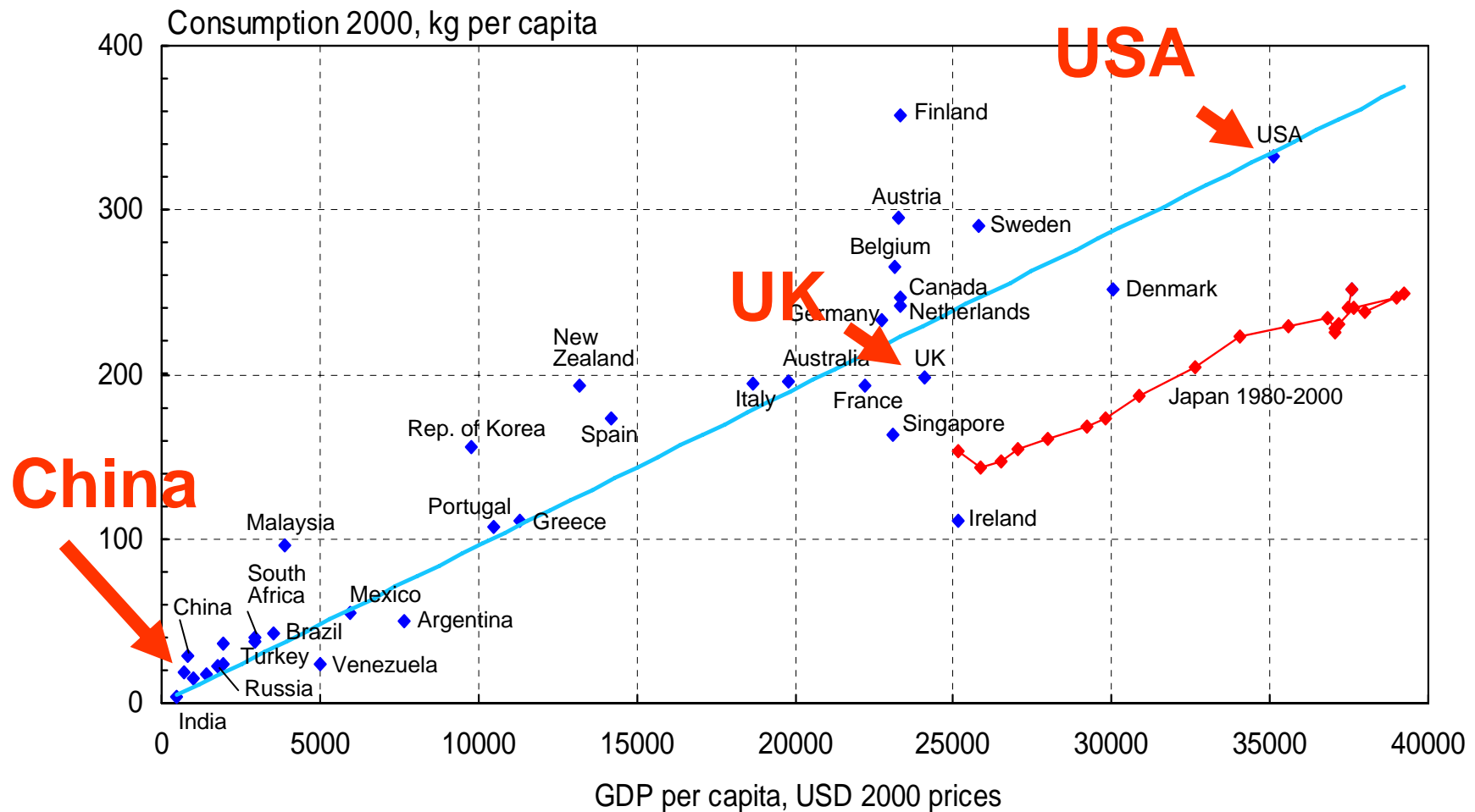
China's economic success >> increased consumption and export manufacturing



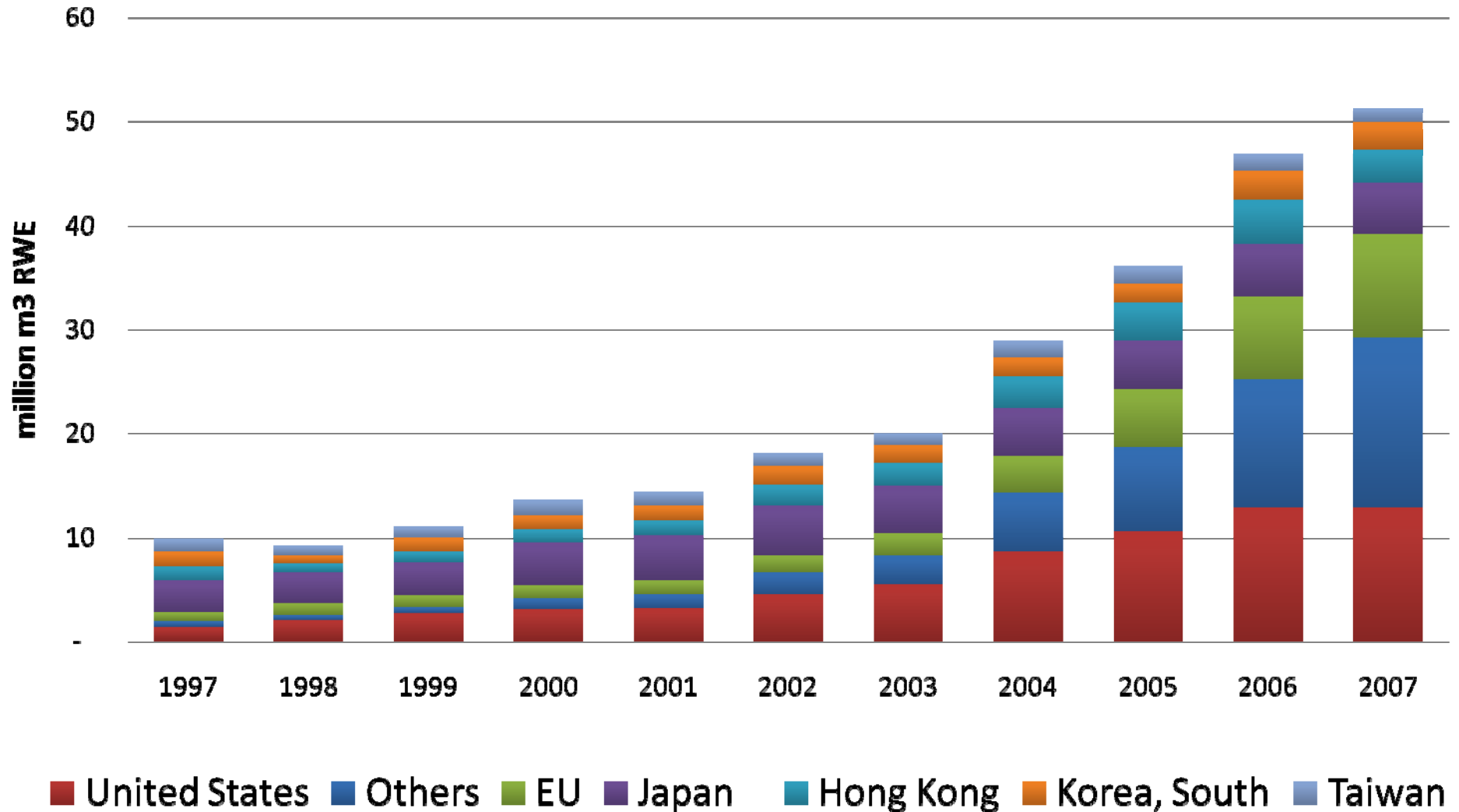
Source: RISI
Adapted Fuller and Bernard. 2006. *China's Rapidly Expanding Wood Products Market: Are they Sustainable?* RISI

Drivers of Demand: Domestic Consumption

GDP per capita & paper consumption

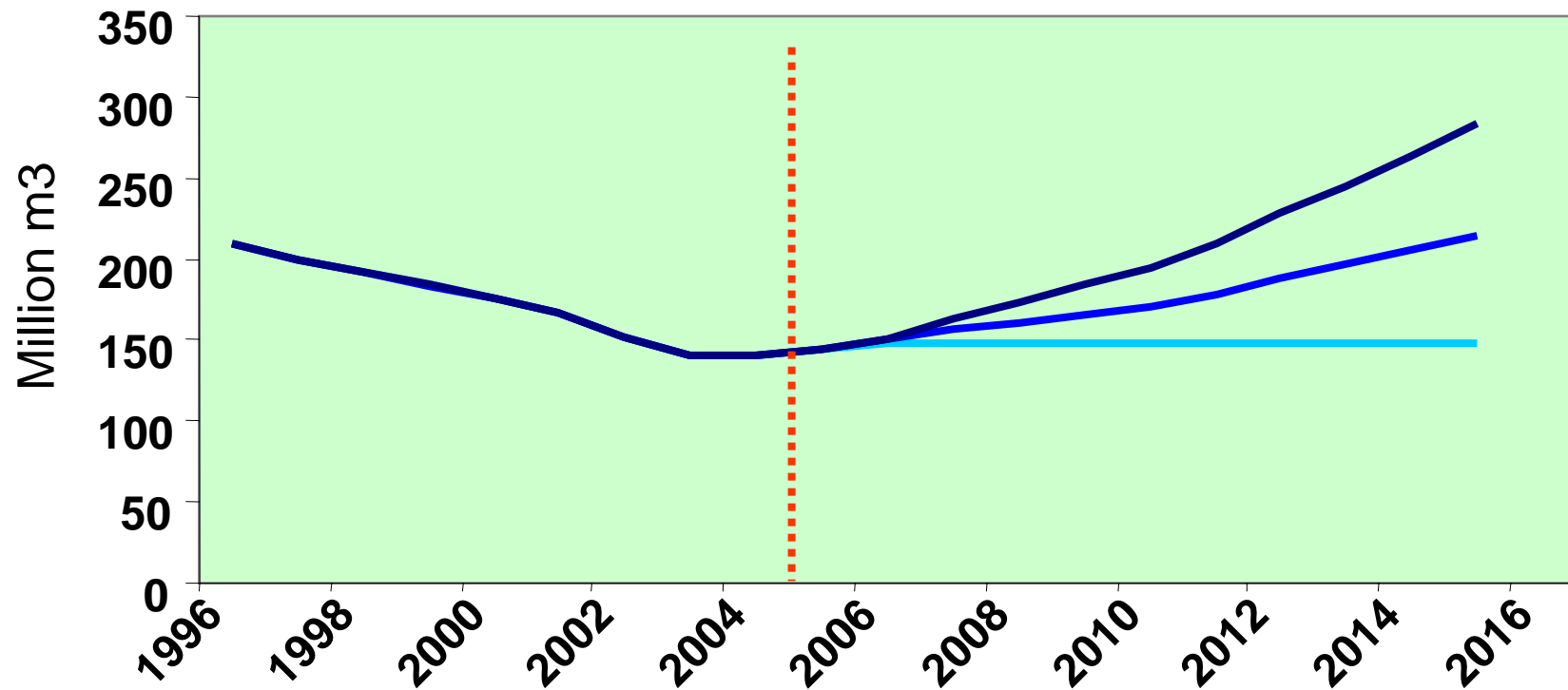


Drivers of Demand: Export



Domestic production is not keeping up...

Varying projections of domestic production



Sources: Zhou (SFA) 2001, Bull and Nilsson 2004

Will China be self-sufficient?

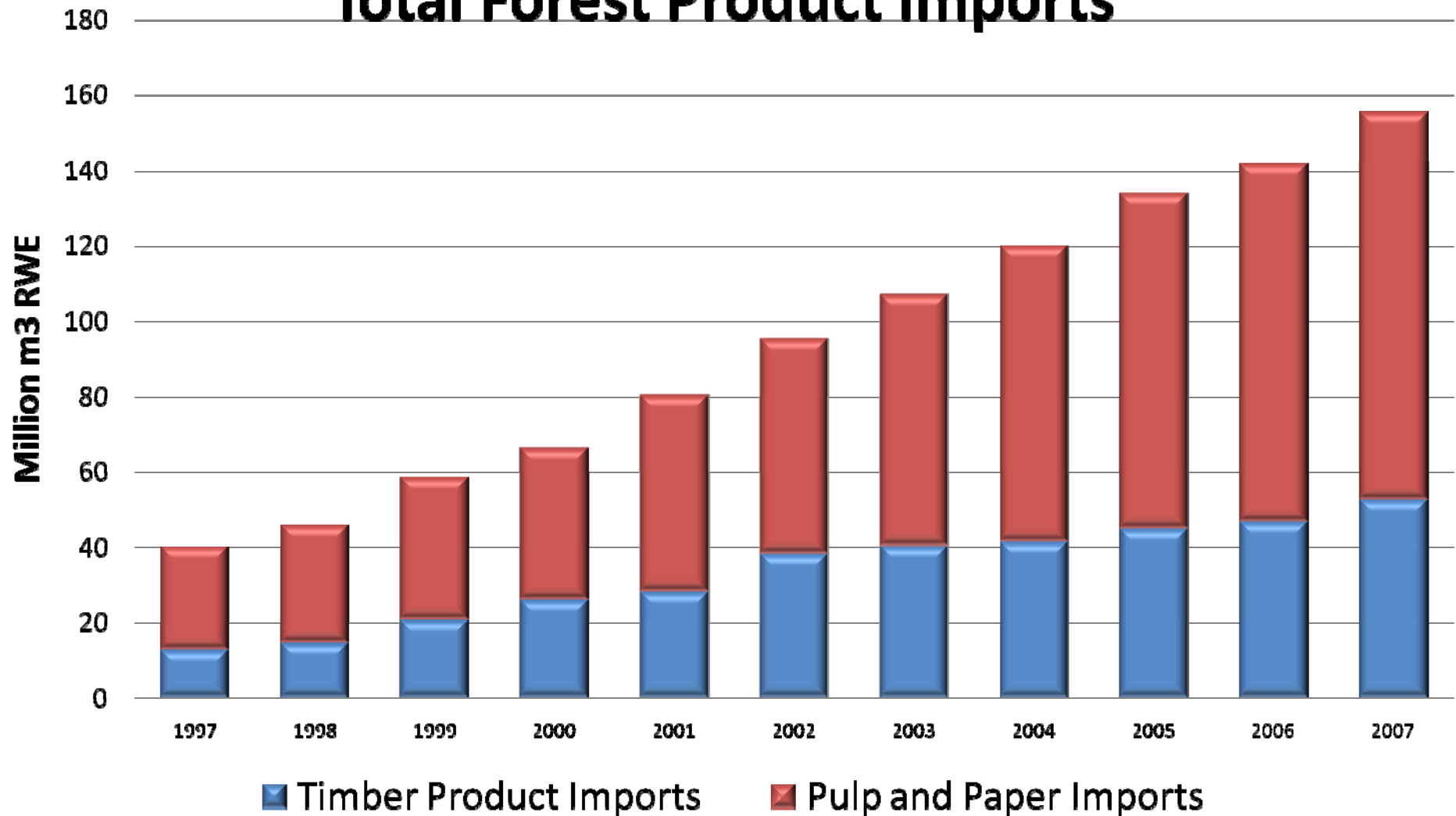
National Development and Reform Commission (2006):
150 million m³ gap between domestic supply of industrial roundwood and demand (domestic consumption + exports).

This gap to be addressed by:

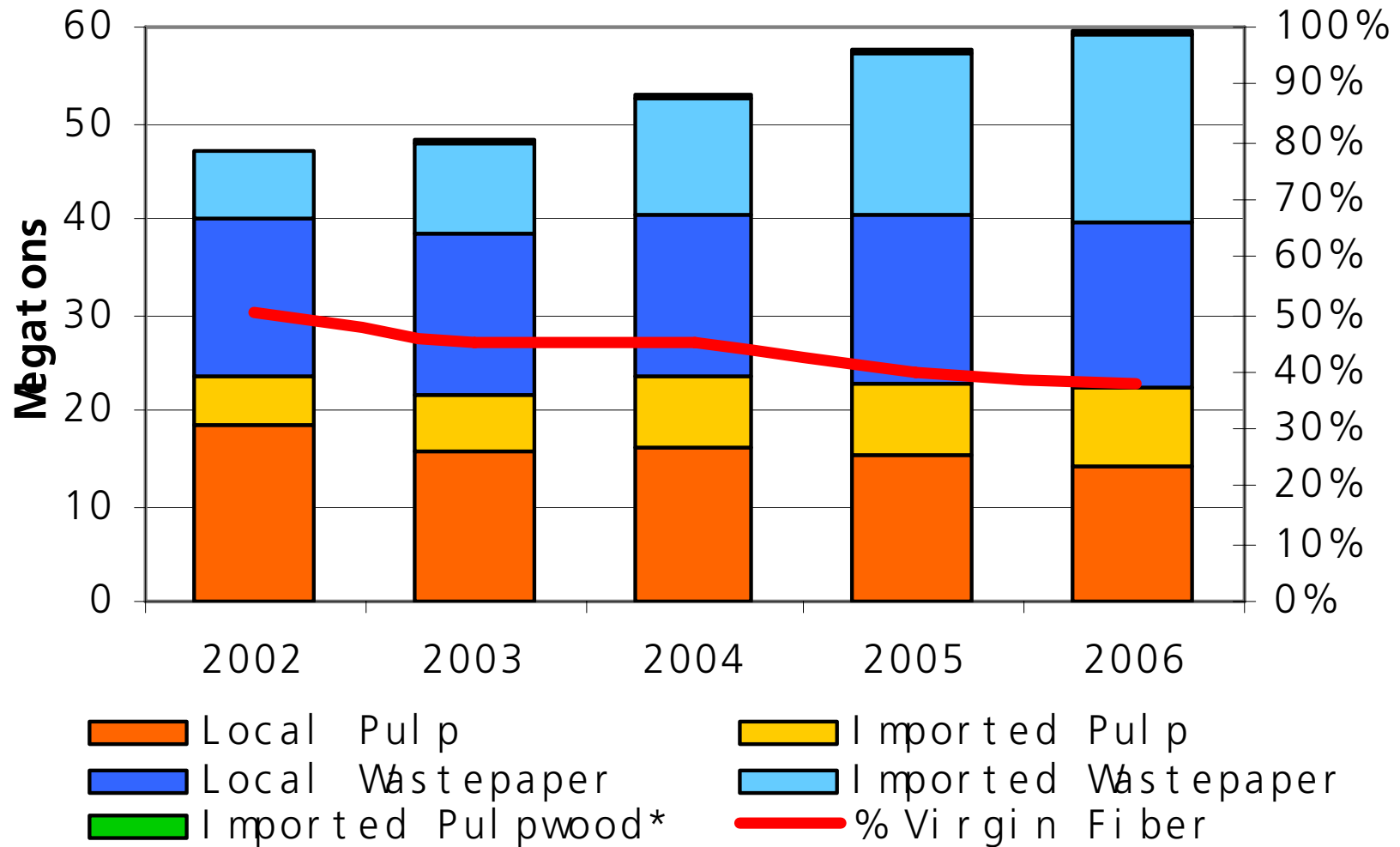
- **imports**
- improvements in domestic production
- substitution
- greater efficiency

2007 import rise

Total Forest Product Imports

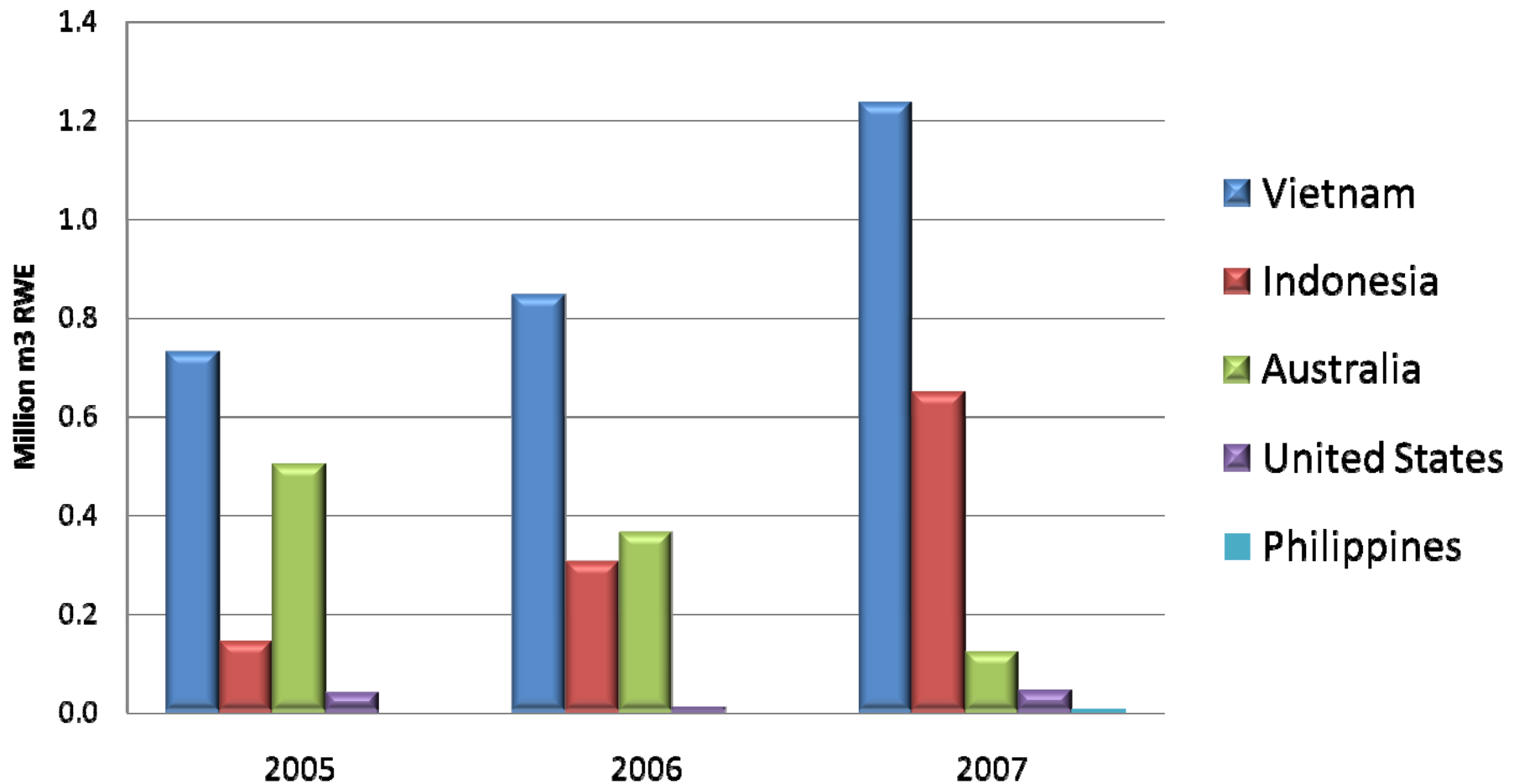


China's Total Papermaking Fiber Resources



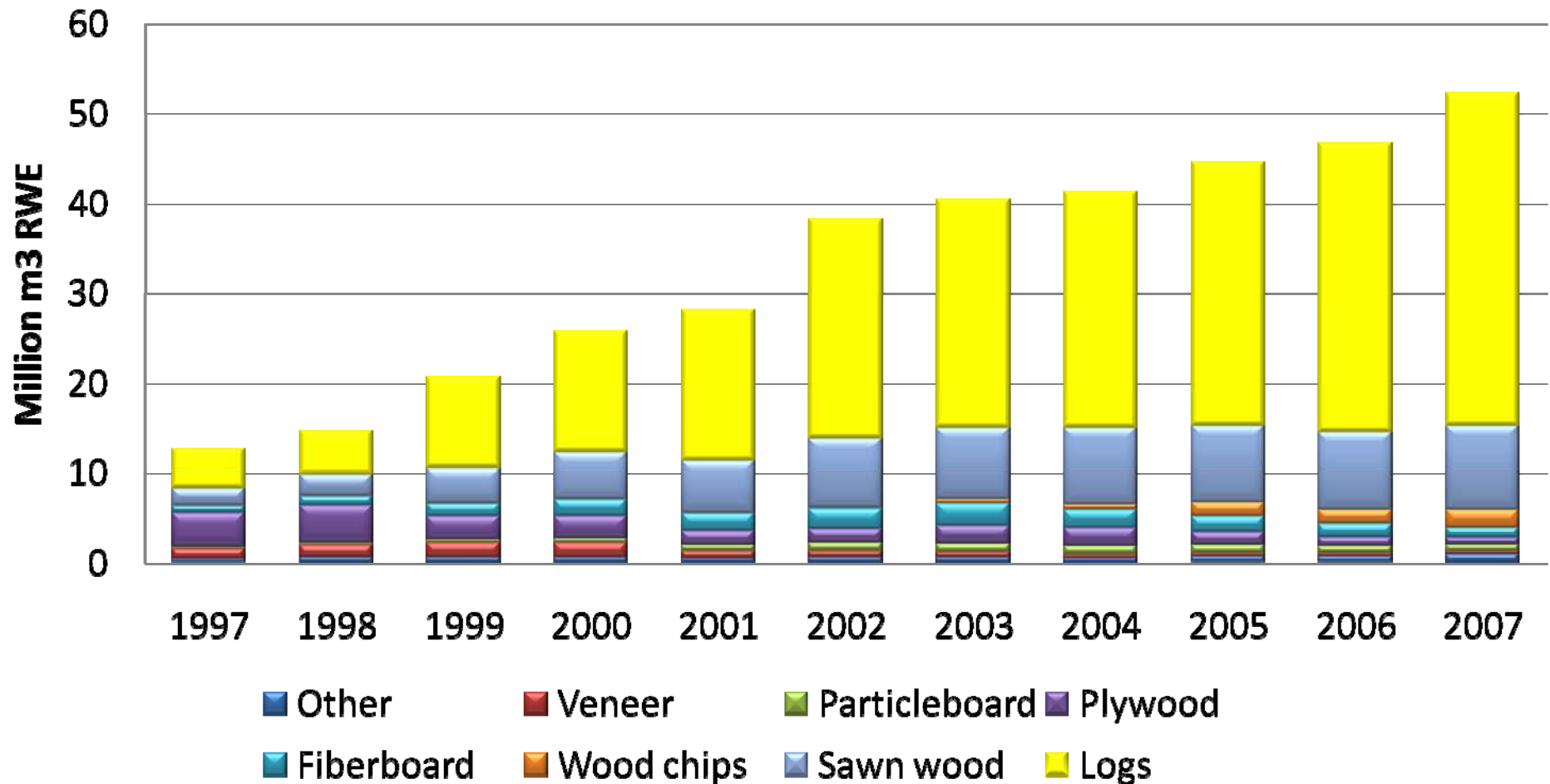
Wood chips small but important to some countries...

Top 5 Exports of Wood Chips to China



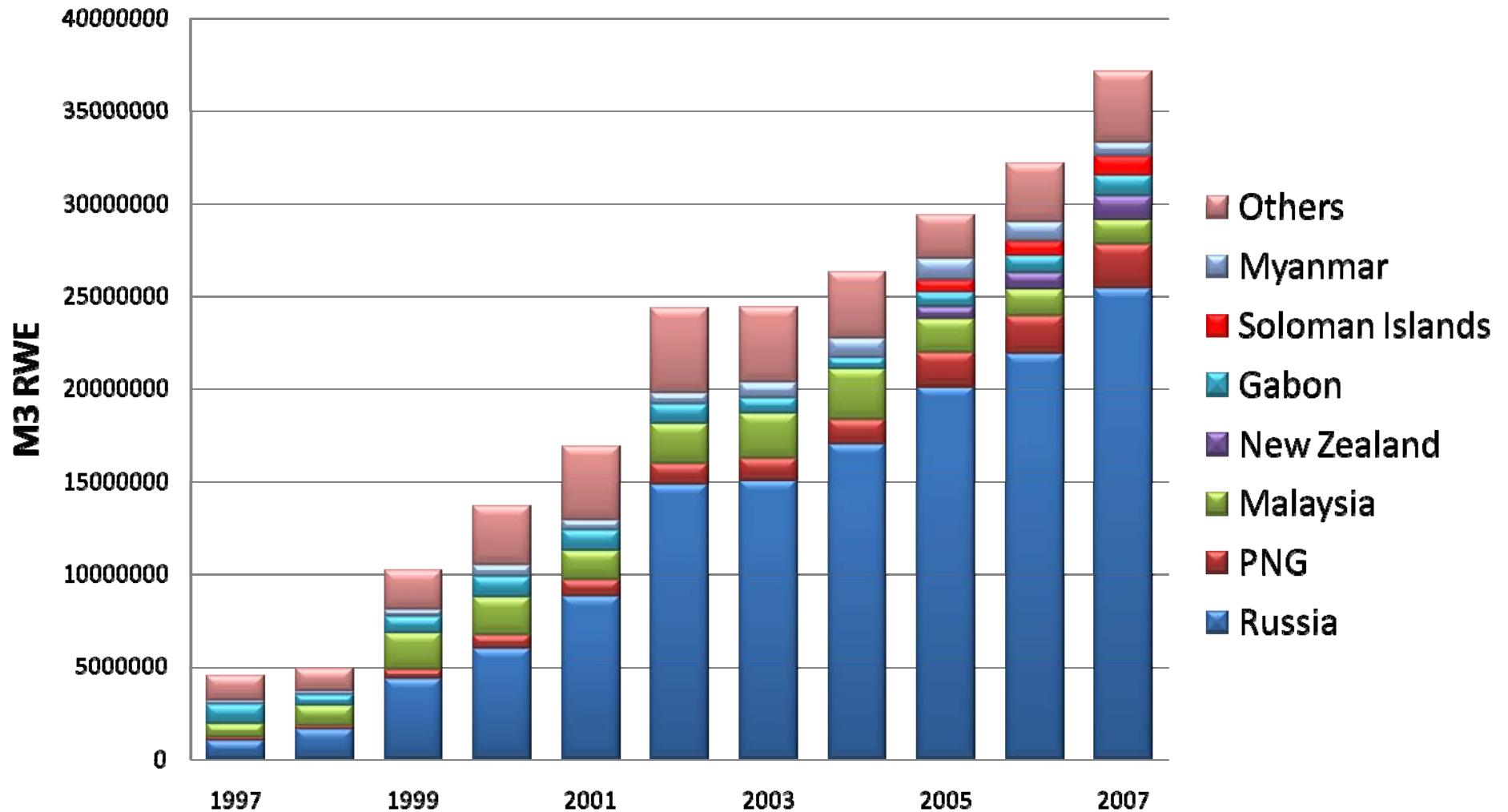
Taking out p & p, logs

China's Timber Product Imports by Category



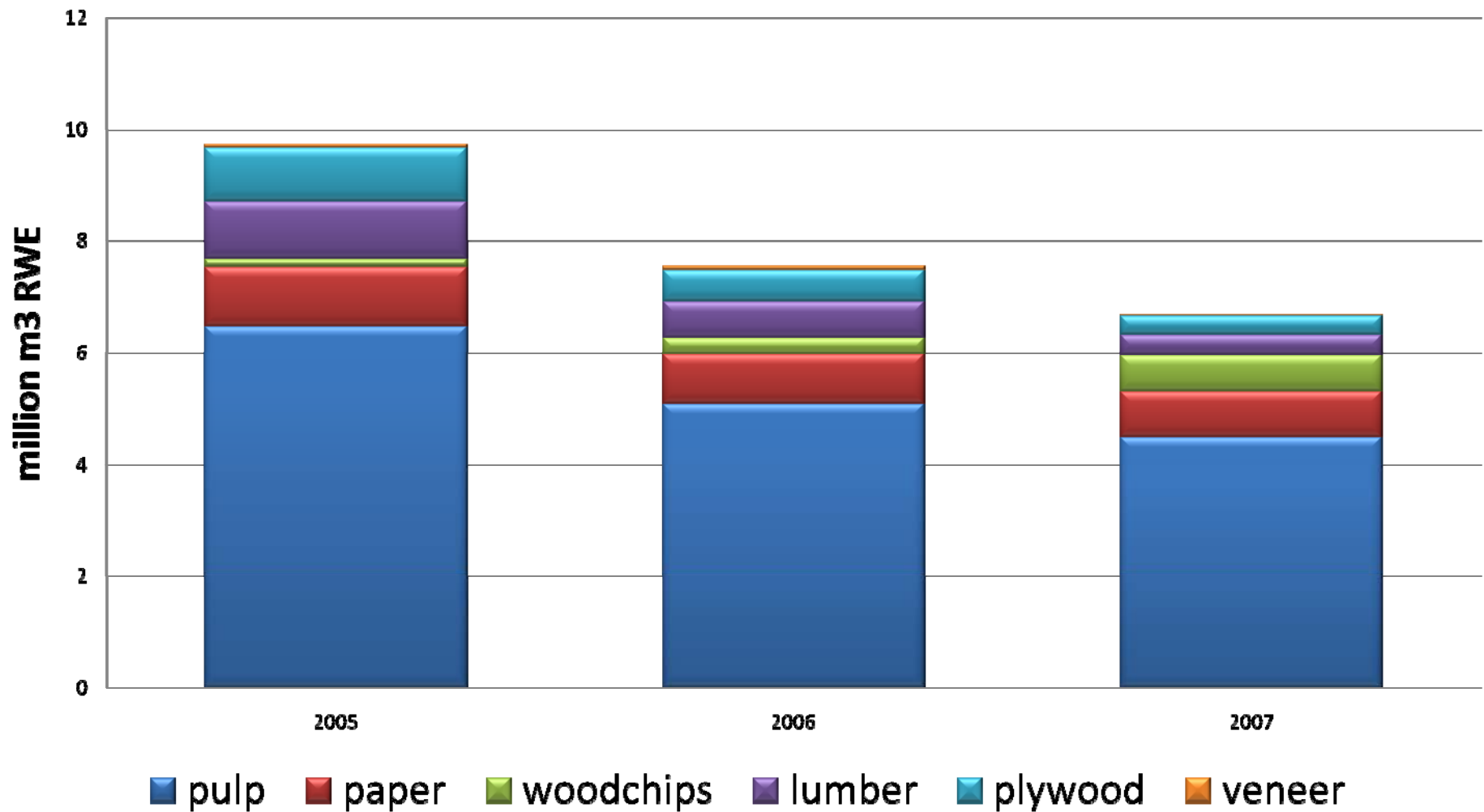
Russian logs dominate....

China Log Imports

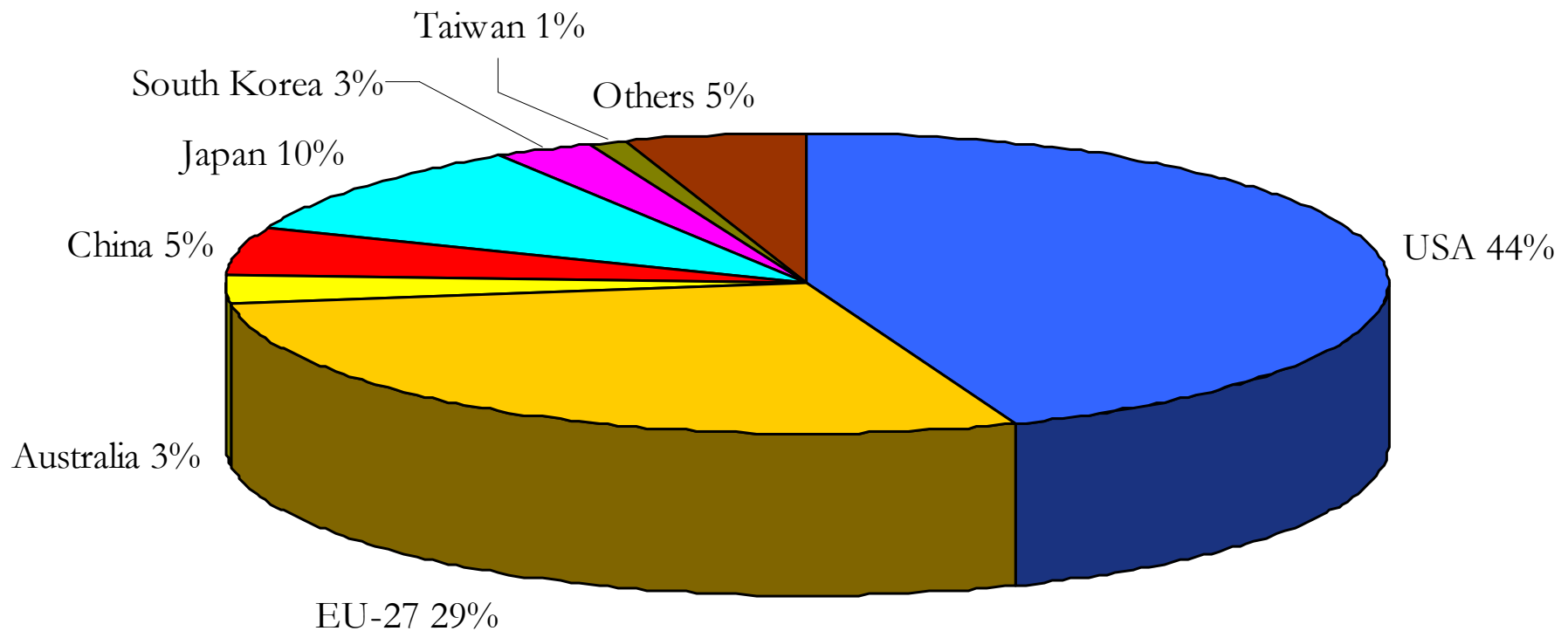


Indonesian imports

Indonesian Exports to China



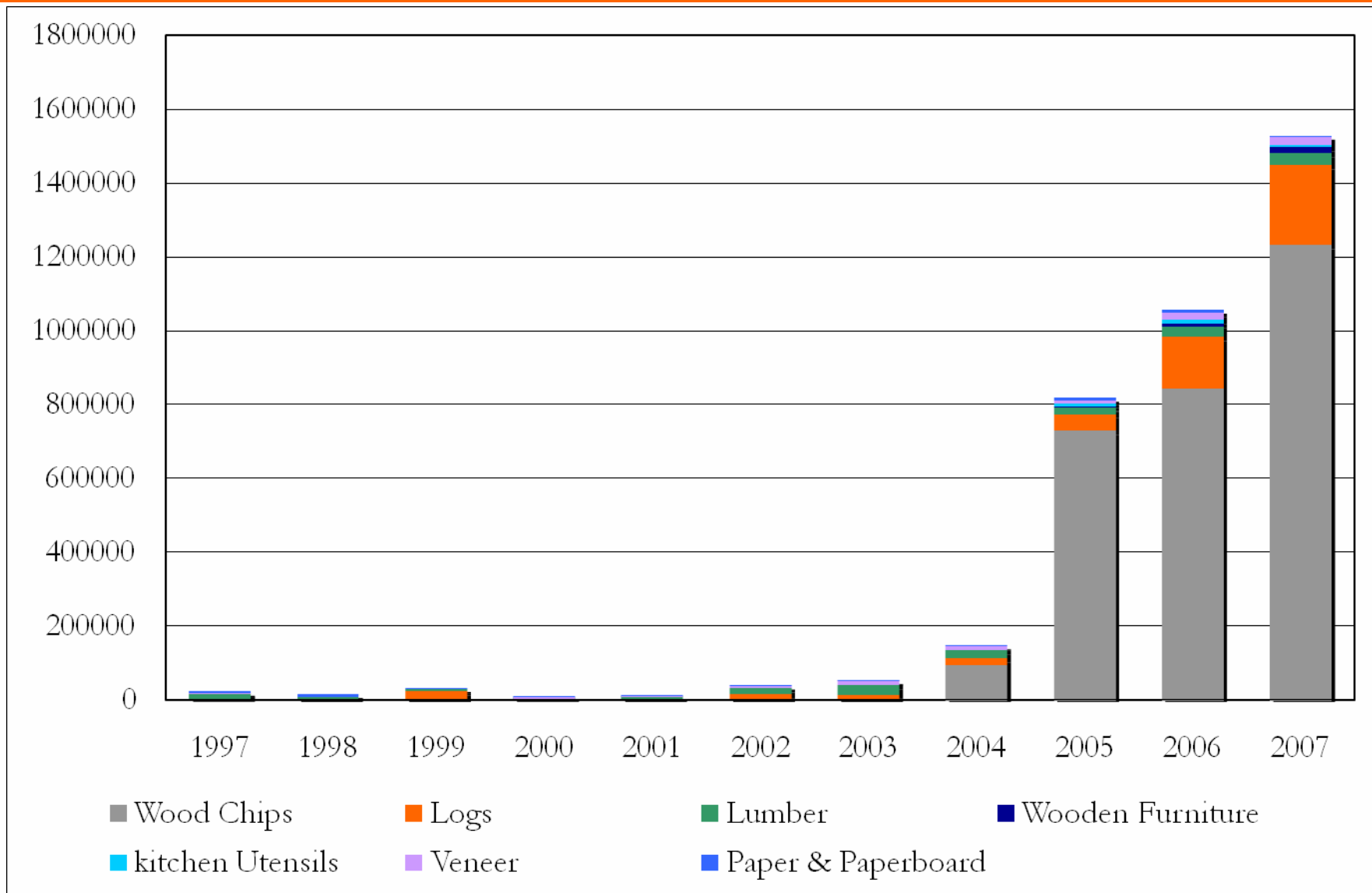
Vietnamese Exports 2007



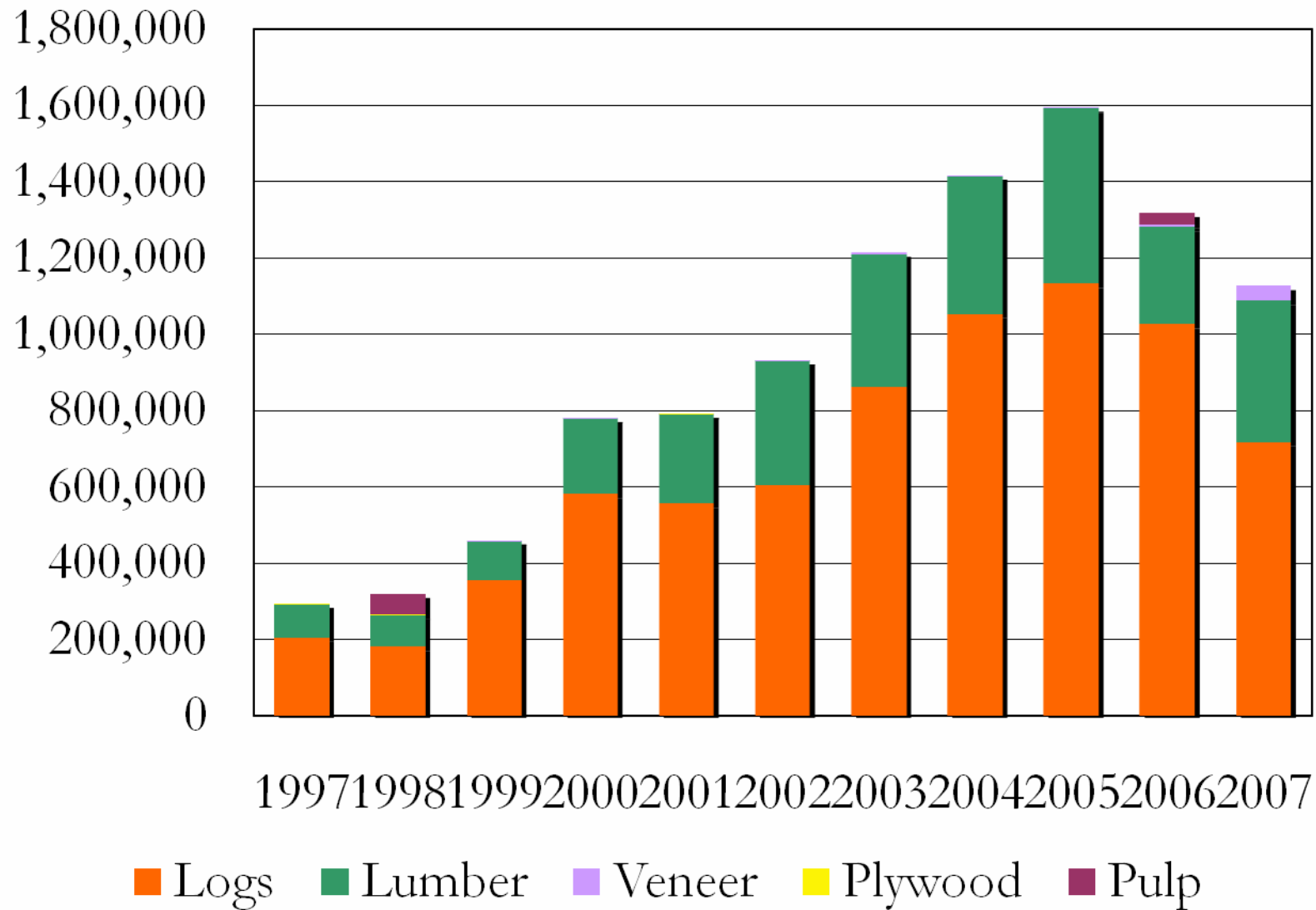
Laos Exports to China



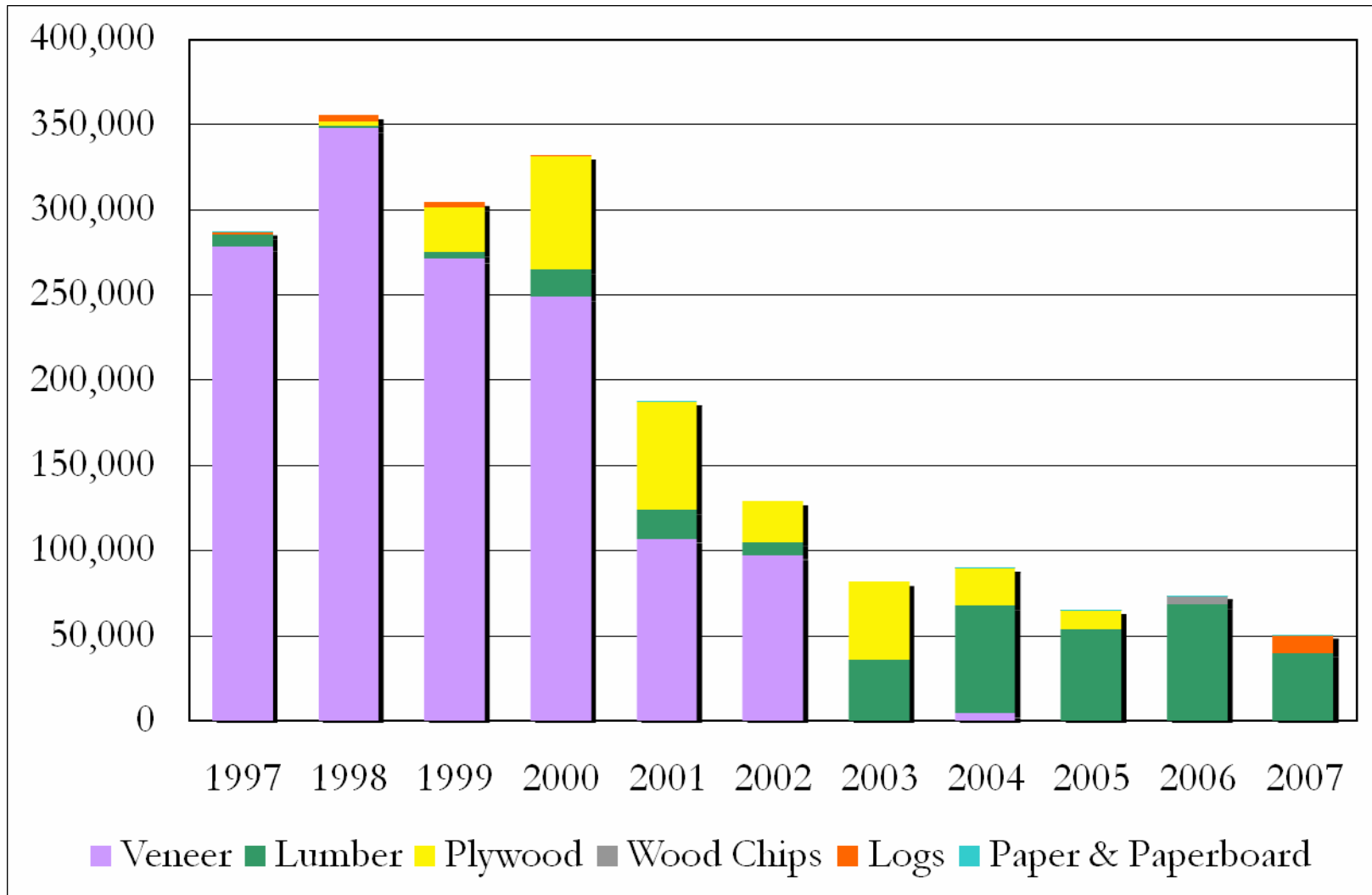
Vietnam Exports to China



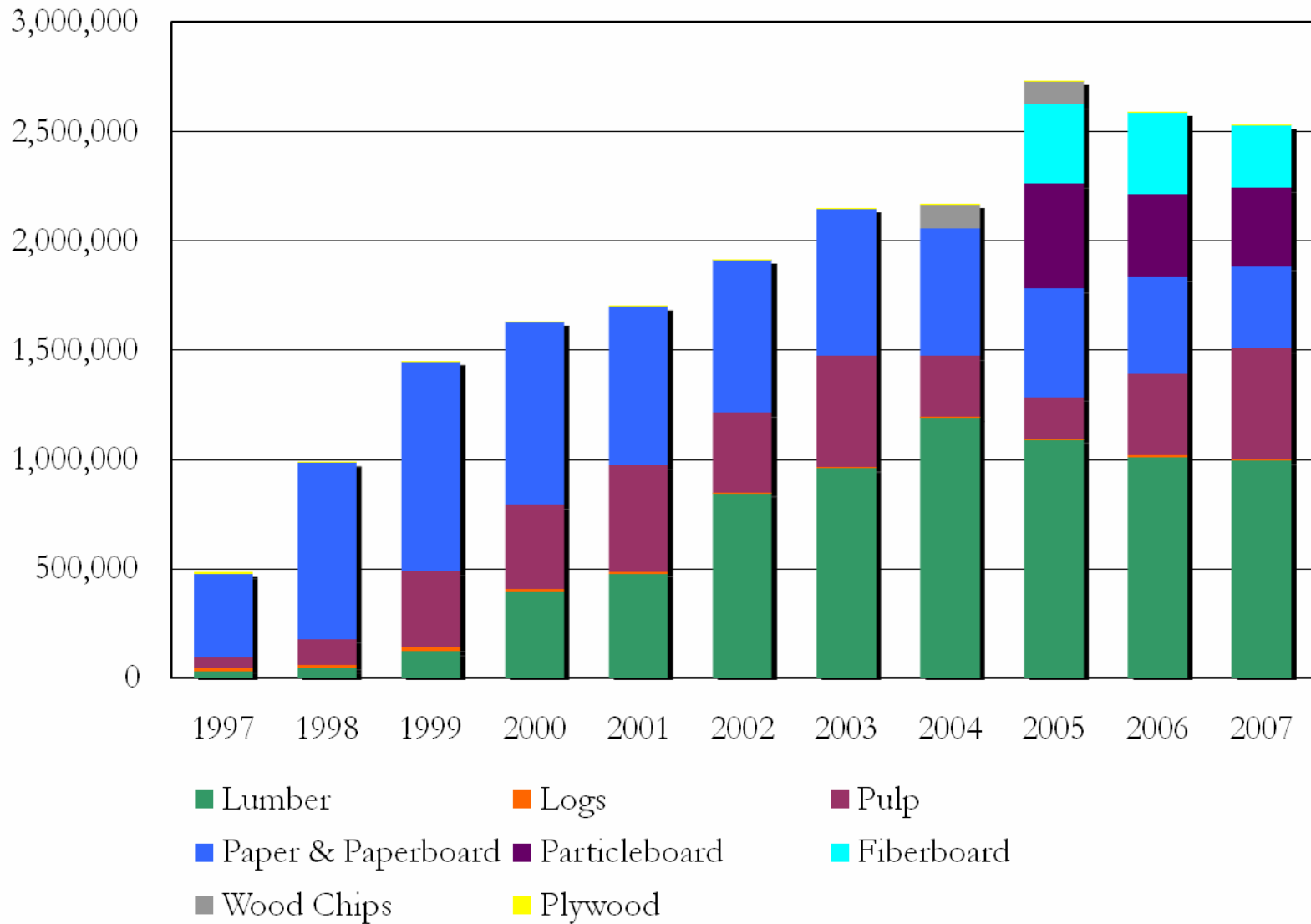
Burmese Exports to China



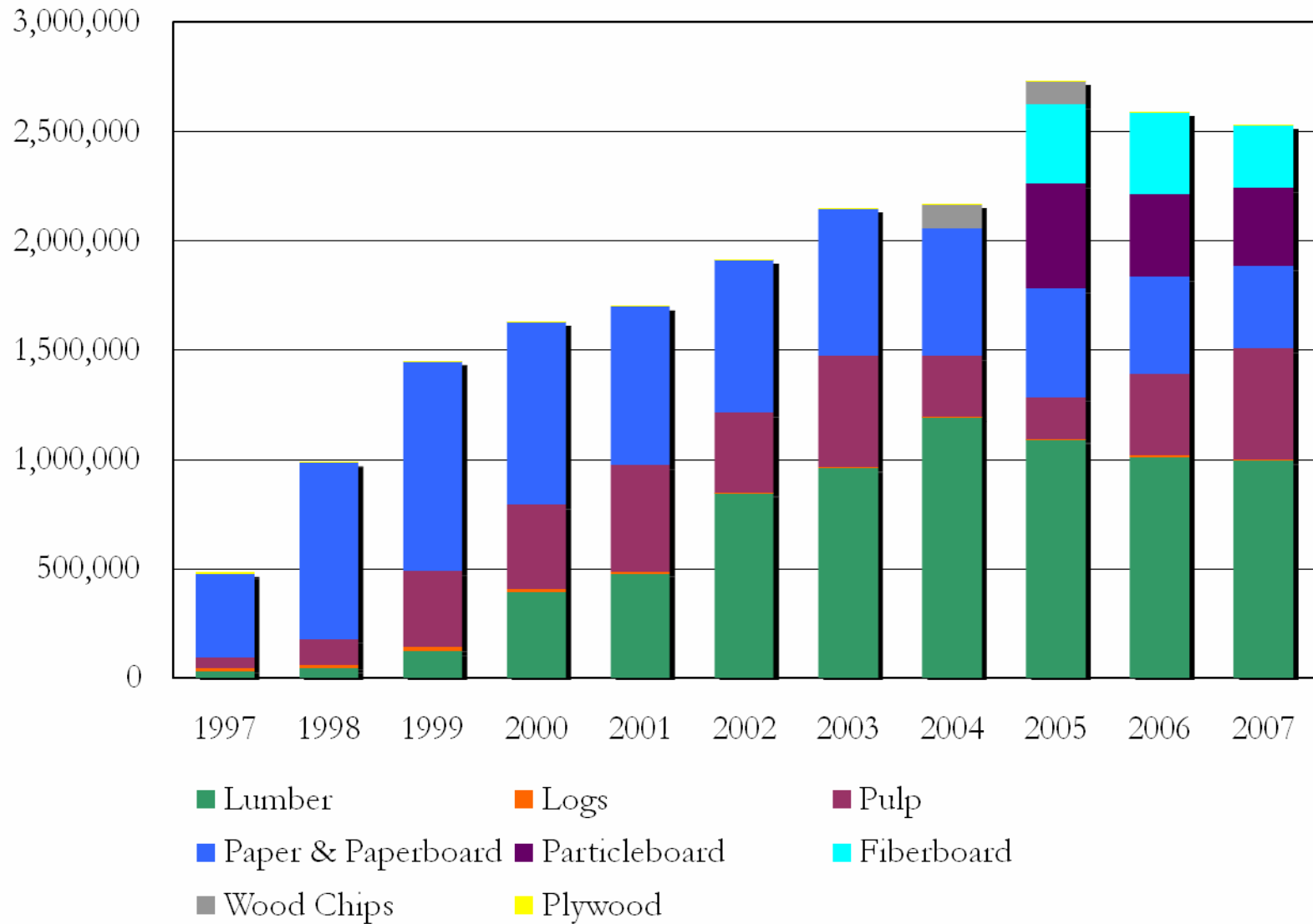
Cambodia Exports to China



Thai Exports to China



Malaysian Exports to China





FOREST
TRENDS



A Work in Progress

Thank you