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Trend and Developments in International Trade of Temperate Hardwoods

Dr. Kent Wheiler

Associate Professor, Director

Center for International Trade in Forest Products

School of Environmental and Forest Sciences

College of the Environment

University of Washington



Center for International Trade in Forest Products



CINTRAFOR

The Center for International Trade in Forest Products

1. We believe that using sustainably, responsibly sourced wood is good for the environment and for humanity
2. We believe that “Peace is a natural effect of trade”
3. Accordingly, we are involved in research and education to support and promote the use of, and trade in, sustainably produced forest products

Kent Wheiler



- B.S. in Accounting, CPA with Arthur Andersen
- Ph.D. in Marketing, University of Texas at Austin
- 30 years forestry industry experience, including 26 years with Weyerhaeuser
- Lived in Tokyo six years, Shanghai four years, Dubai one year
- Career focus market development and plantation operations
- Managed timber and bamboo plantations in China, Indonesia, Ghana, South Africa and Nicaragua



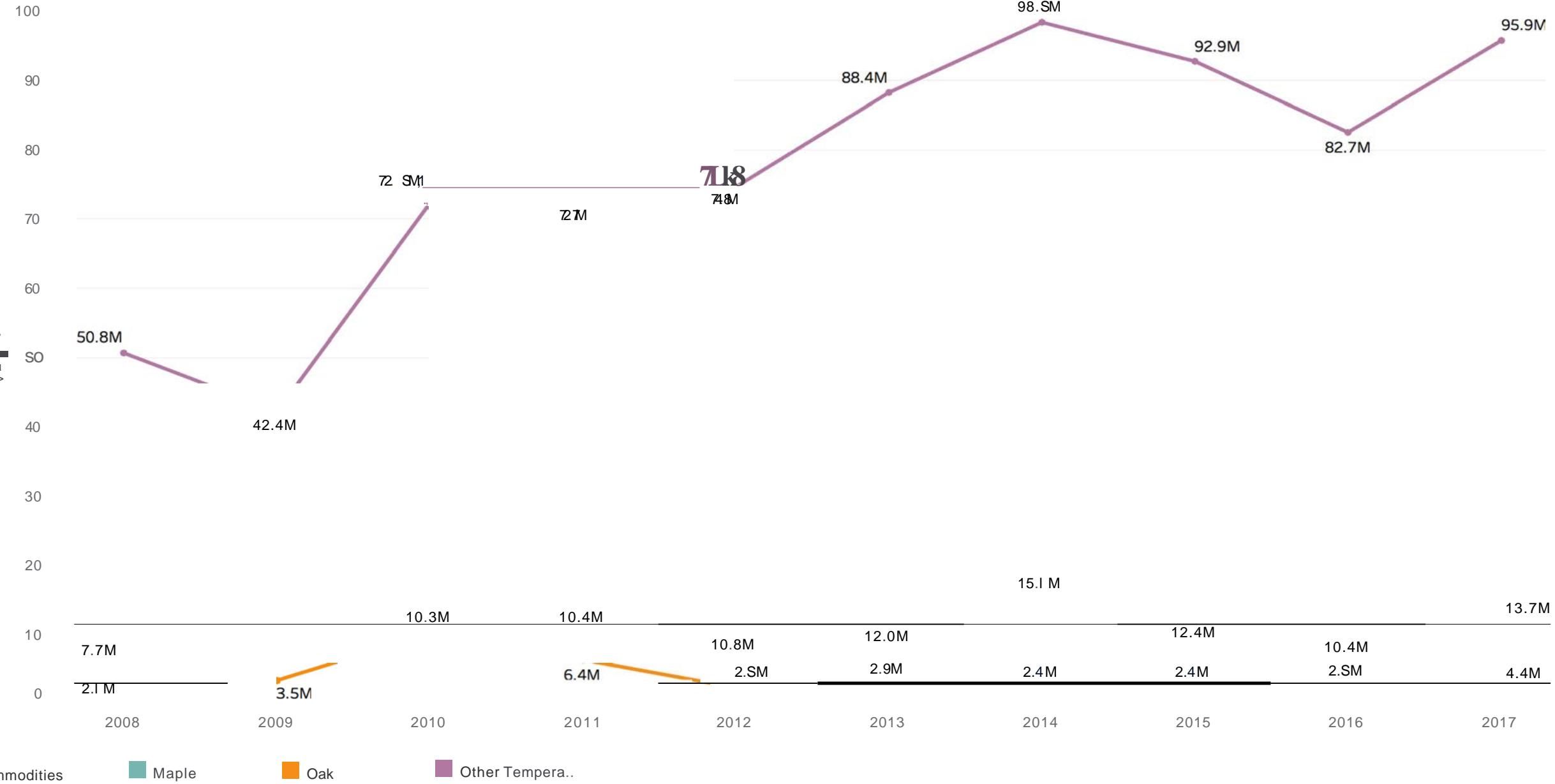
A photograph of a large tree trunk in a forest. The trunk is rough and textured, with some moss or lichen growing on it. In the foreground, there are fallen leaves and twigs on the ground. The background is blurred, showing more trees in the distance.

Washington State and U.S. Temperate Hardwood Exports

Washington State Temperate Hardwood Lumber Exports

US\$ Million

Source: USA Trade (usatrade.census.gov)



U.S. Exports Other Temperate Hardwood Lumber (HS 440799)

U.S. Dollars

(Source: Global Trade Atlas)

350,000,000

300,000,000

250,000,000

200,000,000

150,000,000

100,000,000

50,000,000

0

U.S. Dollars

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

Yellow Poplar

Walnut

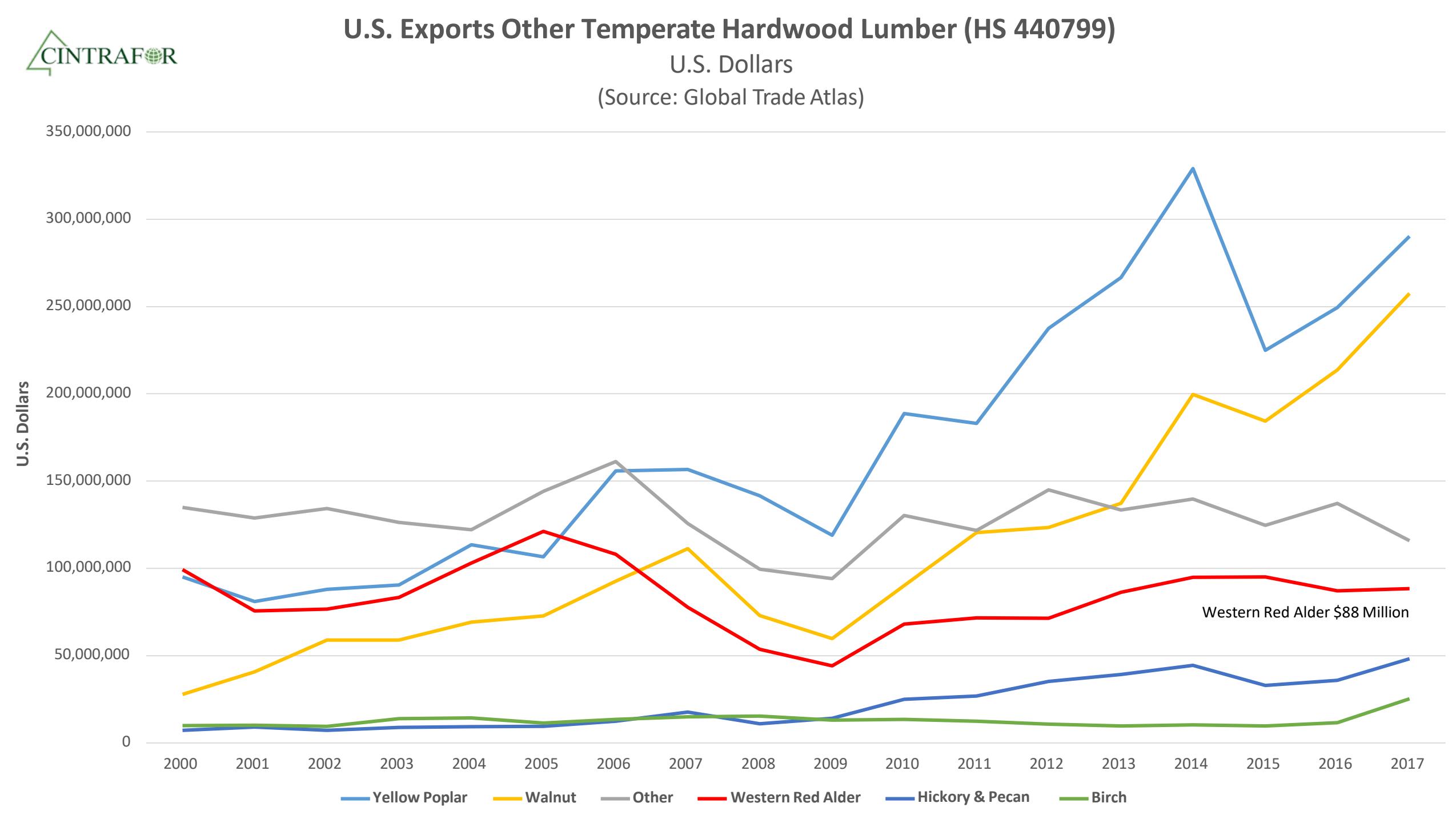
Other

Western Red Alder

Hickory & Pecan

Birch

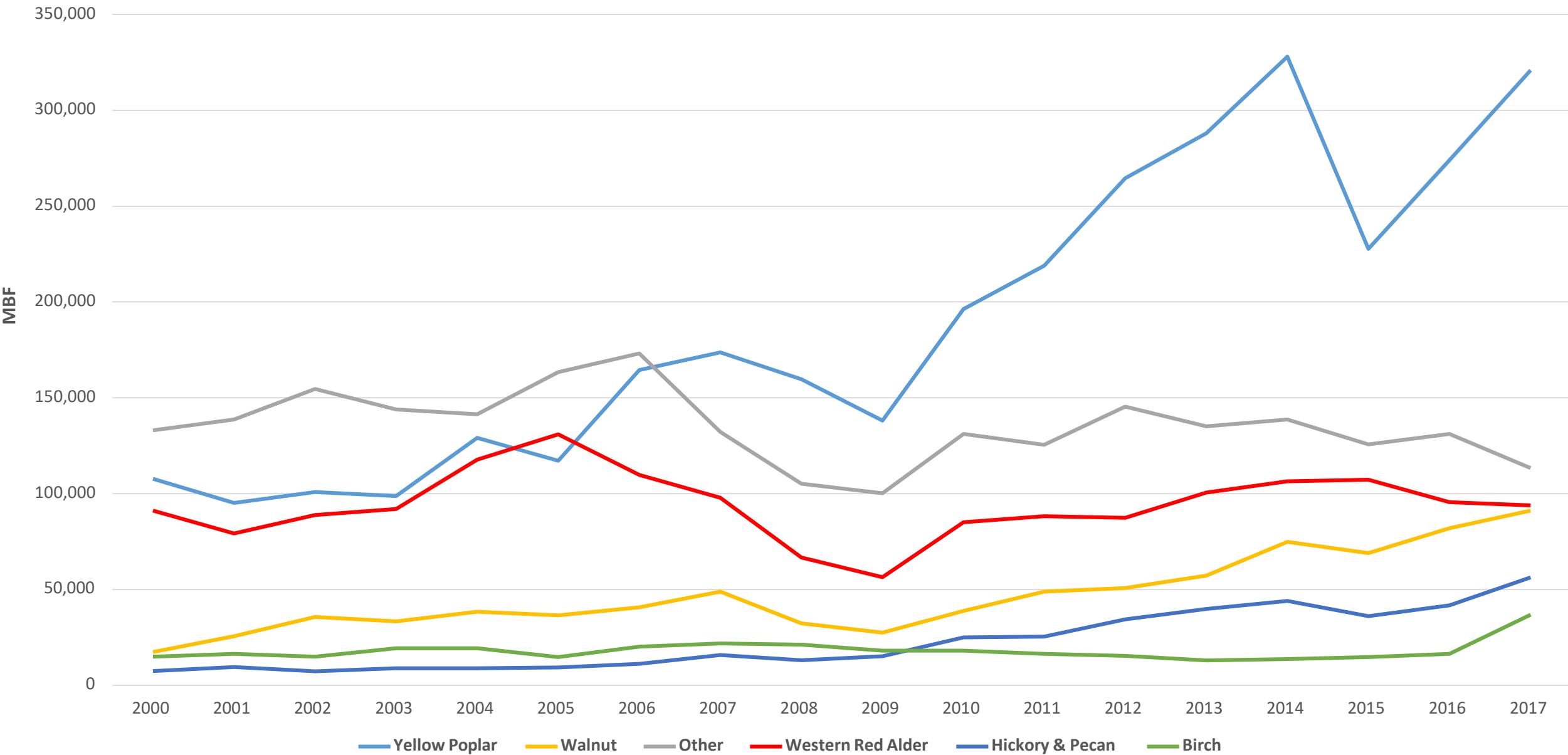
Western Red Alder \$88 Million



U.S. Exports Other Temperate Hardwood Lumber (HS 440799)

MBF

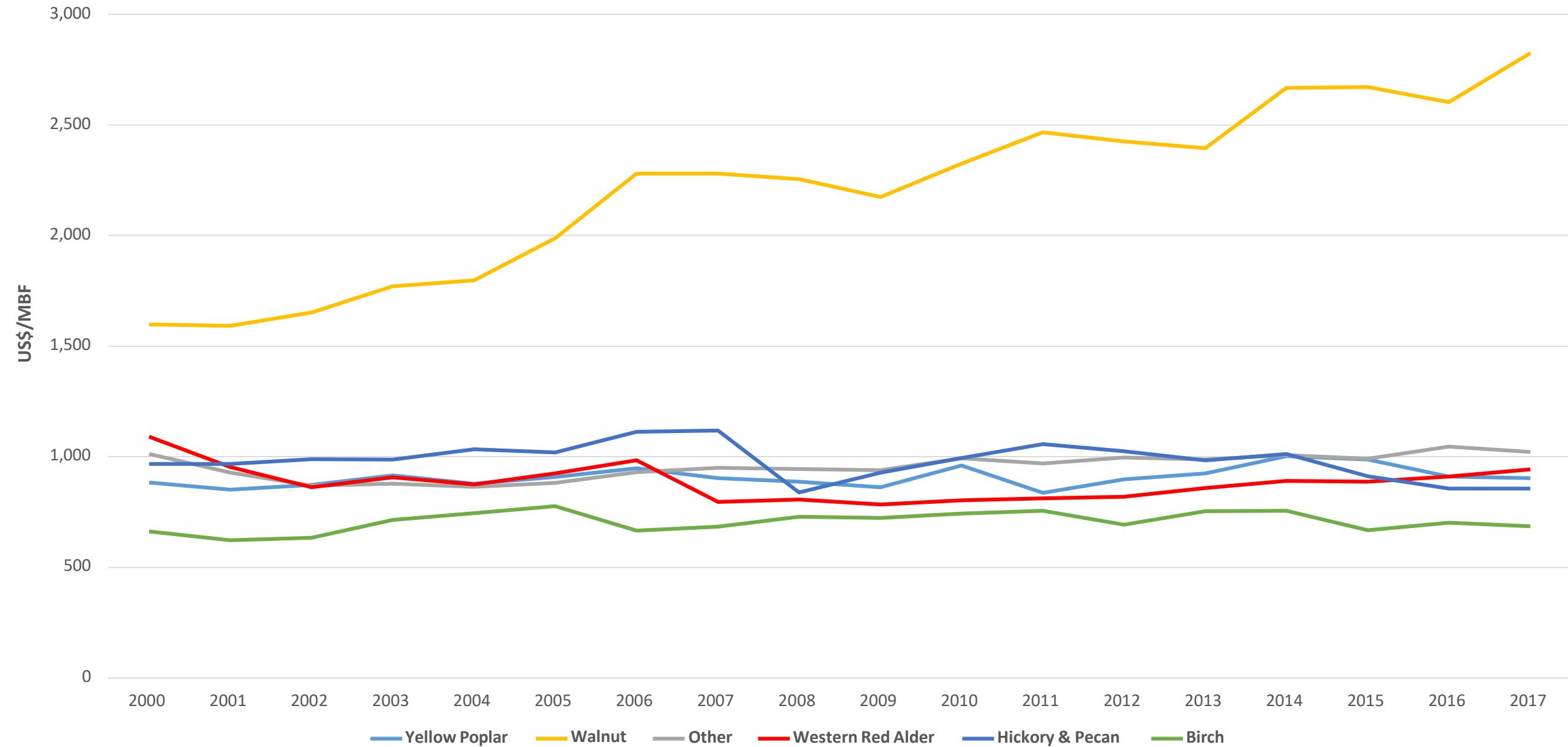
(Source: Global Trade Atlas)



U.S. Exports Other Temperate Hardwood Lumber (HS 440799)

US\$/MBF

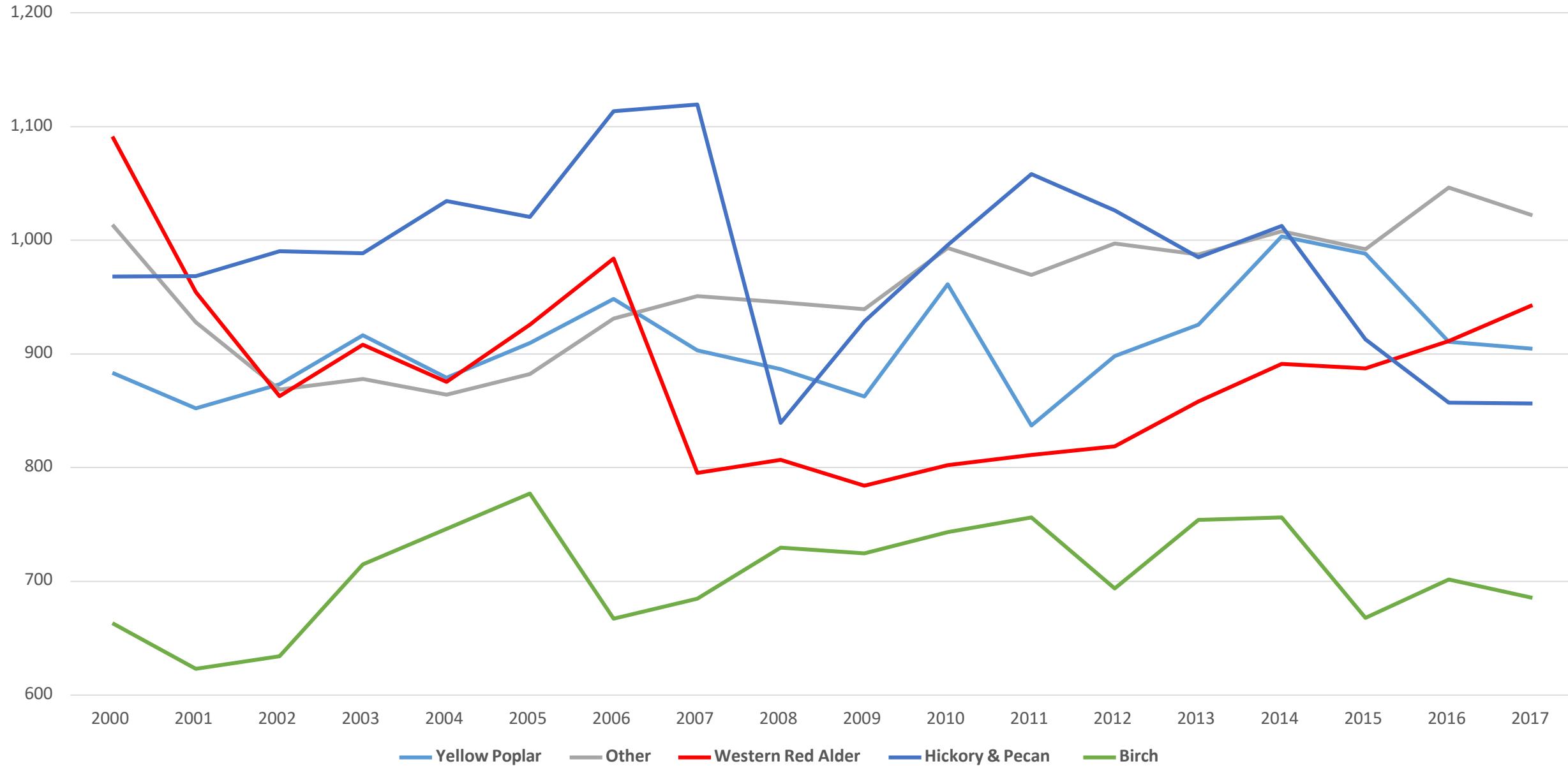
(Source: Global Trade Atlas)



U.S. Exports Other Temperate Hardwood Lumber (HS 440799)

US\$/MBF

(Source: Global Trade Atlas)

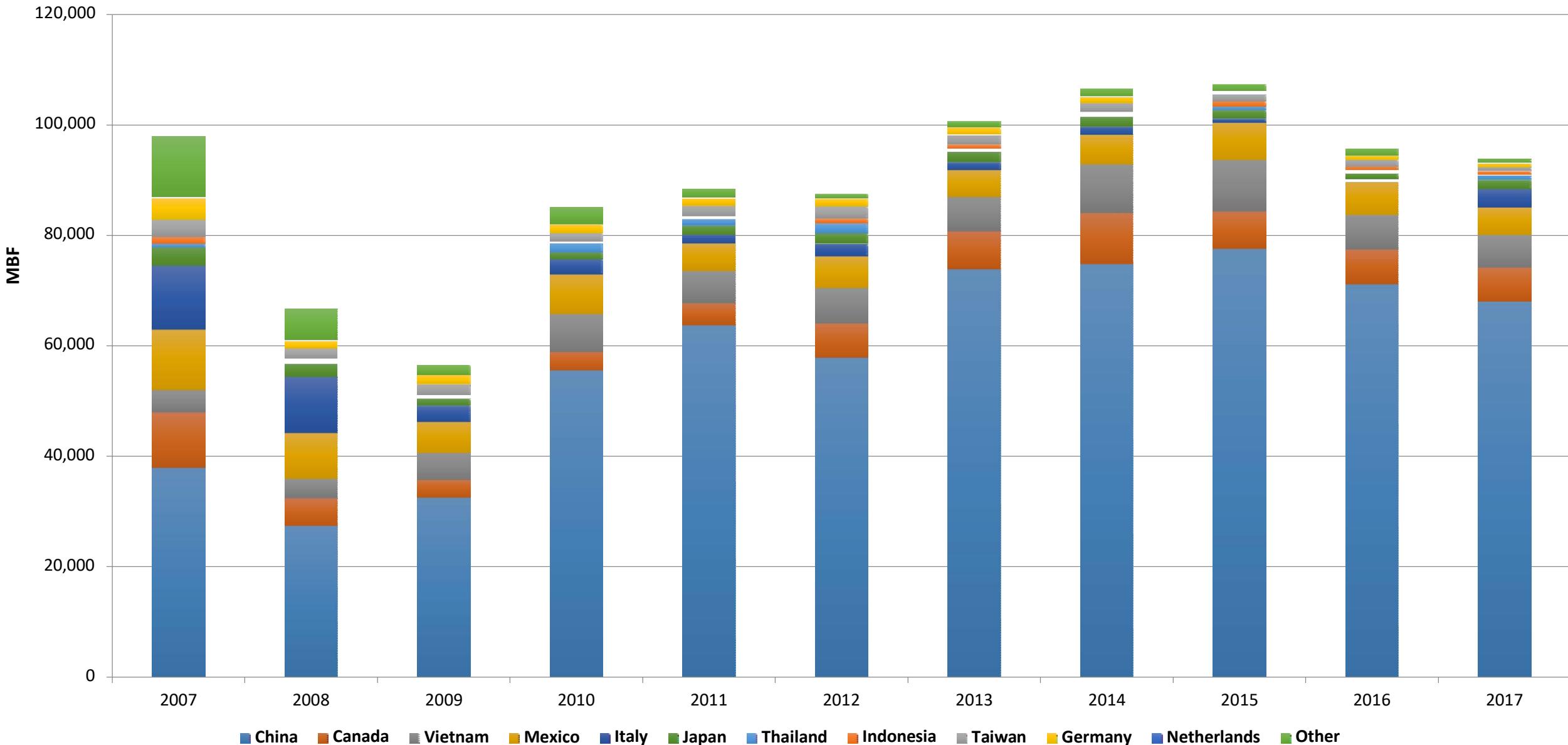




U.S. Western Red Alder Lumber Exports by Country

MBF

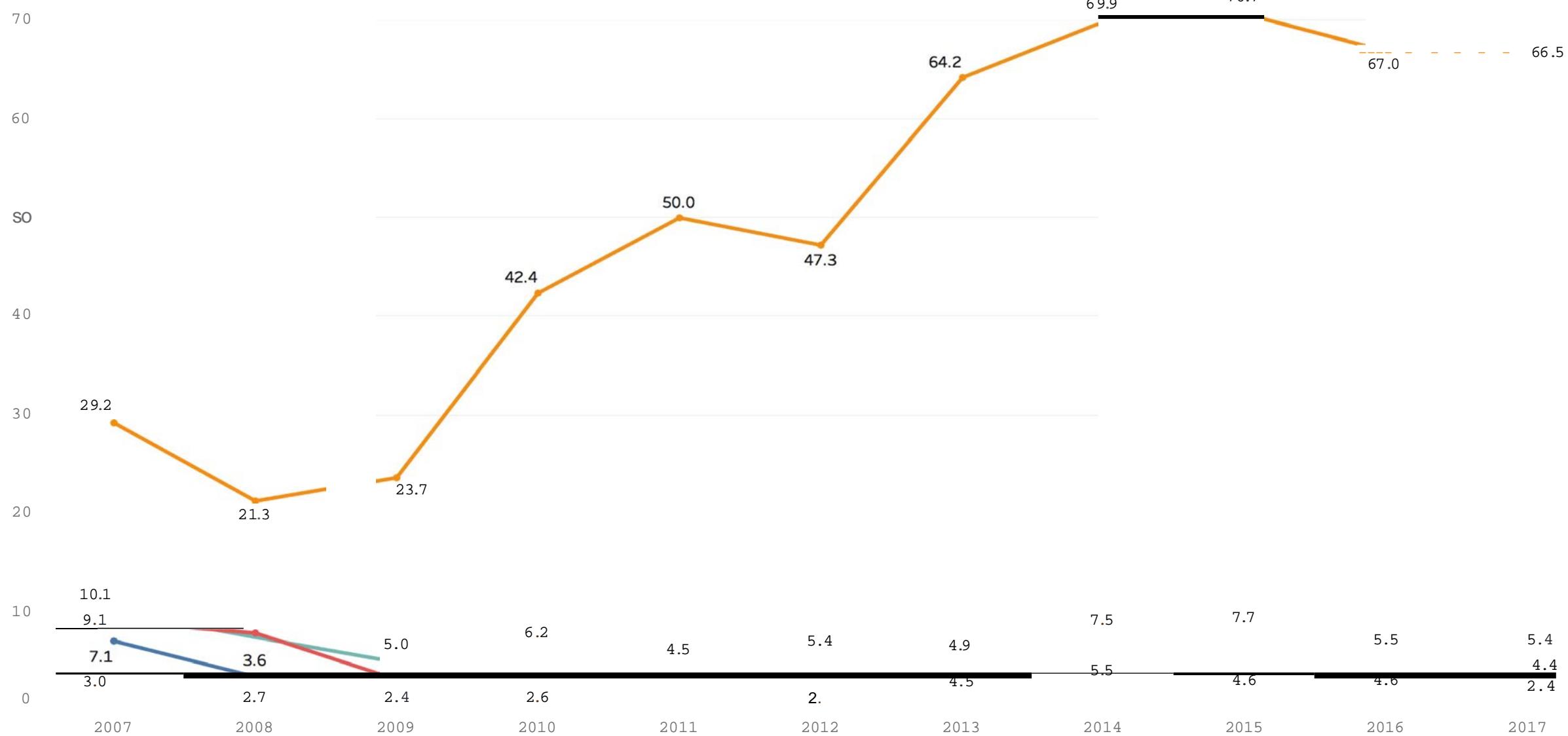
(Source: Global Trade Atlas)



U.S. Red Alder Lumber Exports

US\$ Million

Source: Global Trade Atlas (gtis.com)

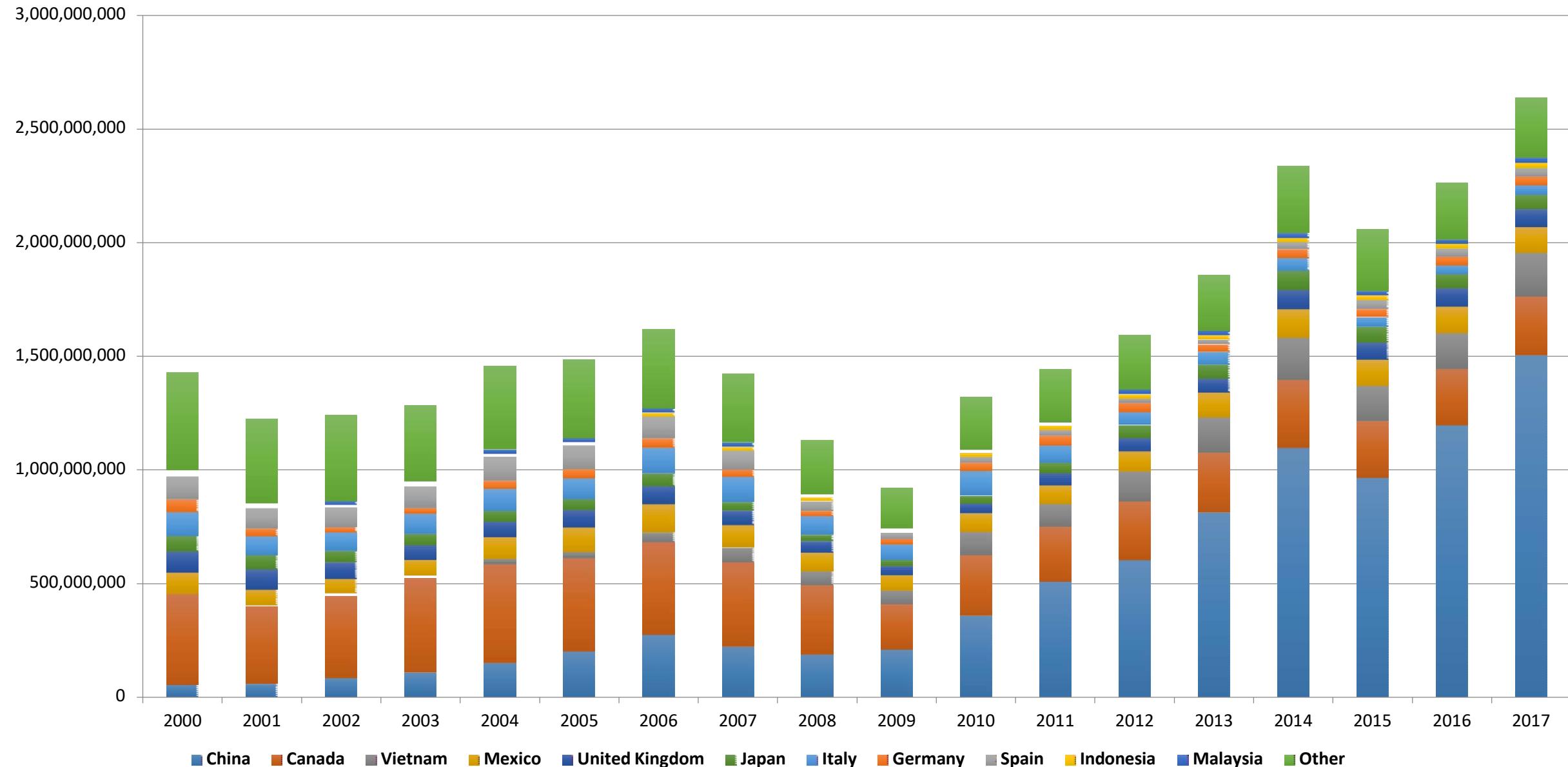




U.S. Hardwood Lumber Exports by Country

U.S. Dollars

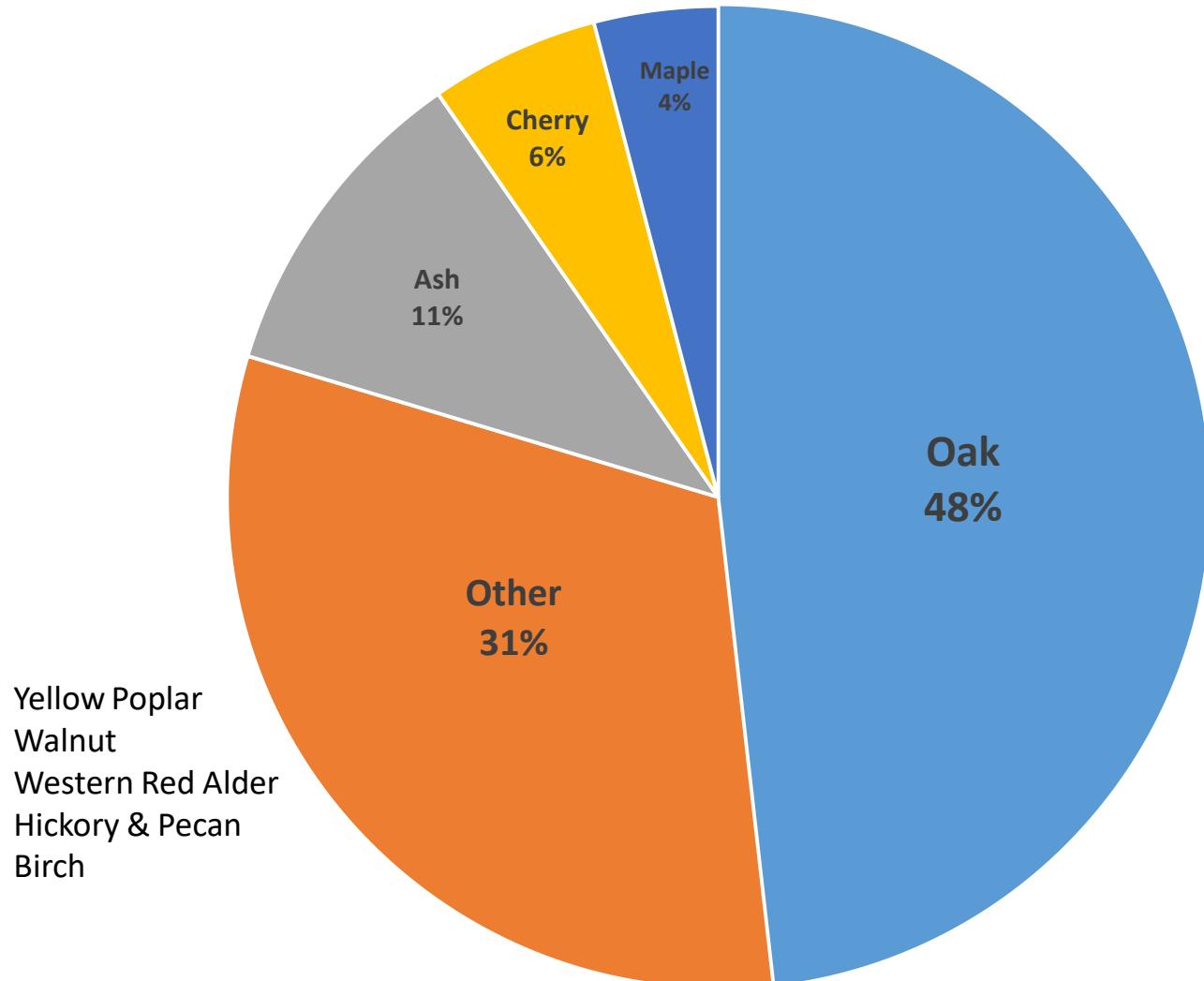
(Source: Global Trade Atlas)



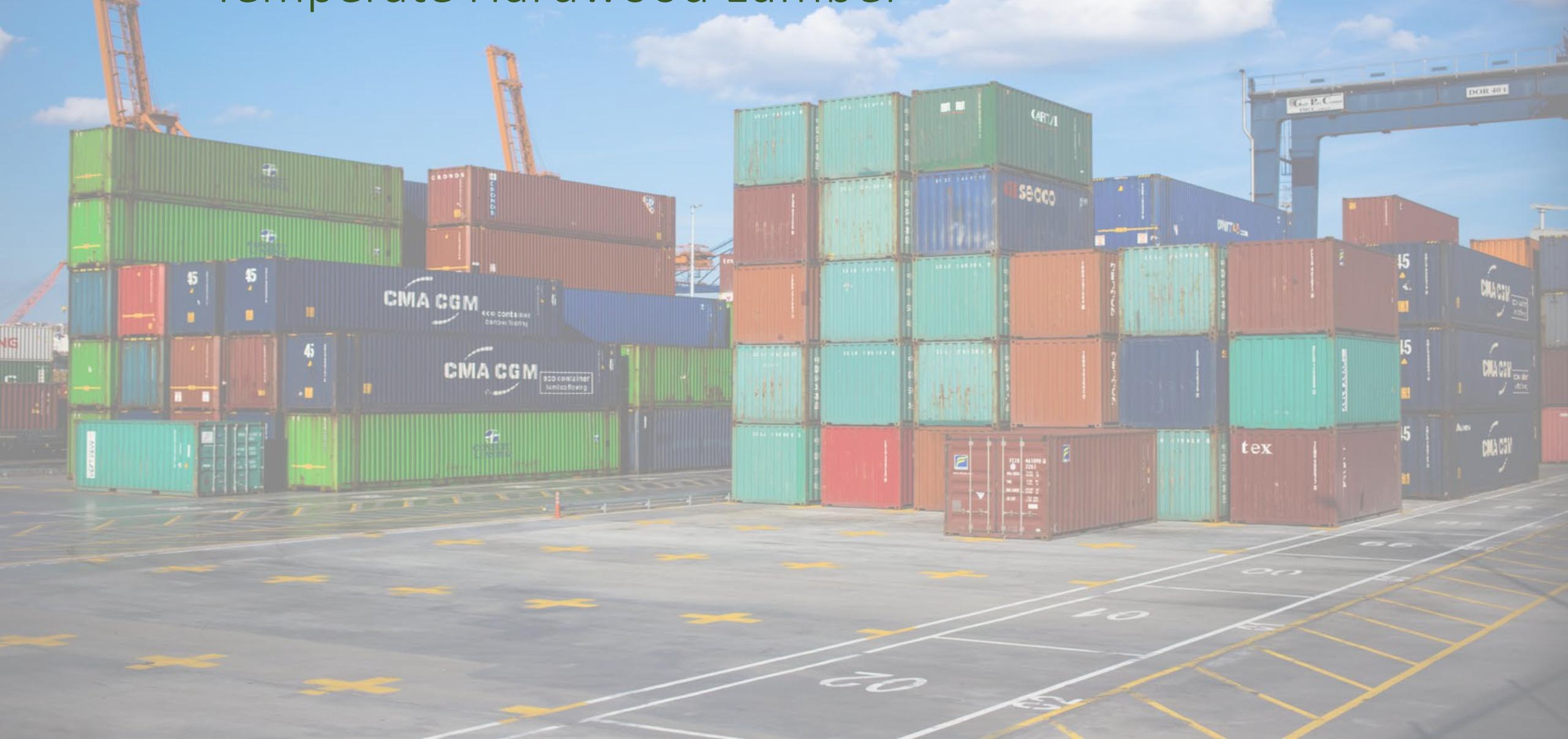
U.S. Temperate Hardwood Lumber Exports

2017, \$2.6 Billion U.S. Dollars

Source: Global Trade Atlas



China Imports of Temperate Hardwood Lumber



China Temperate Hardwood Lumber Imports

MBF

(Source: Global Trade Atlas)

2,500,000

2,000,000

1,500,000

1,000,000

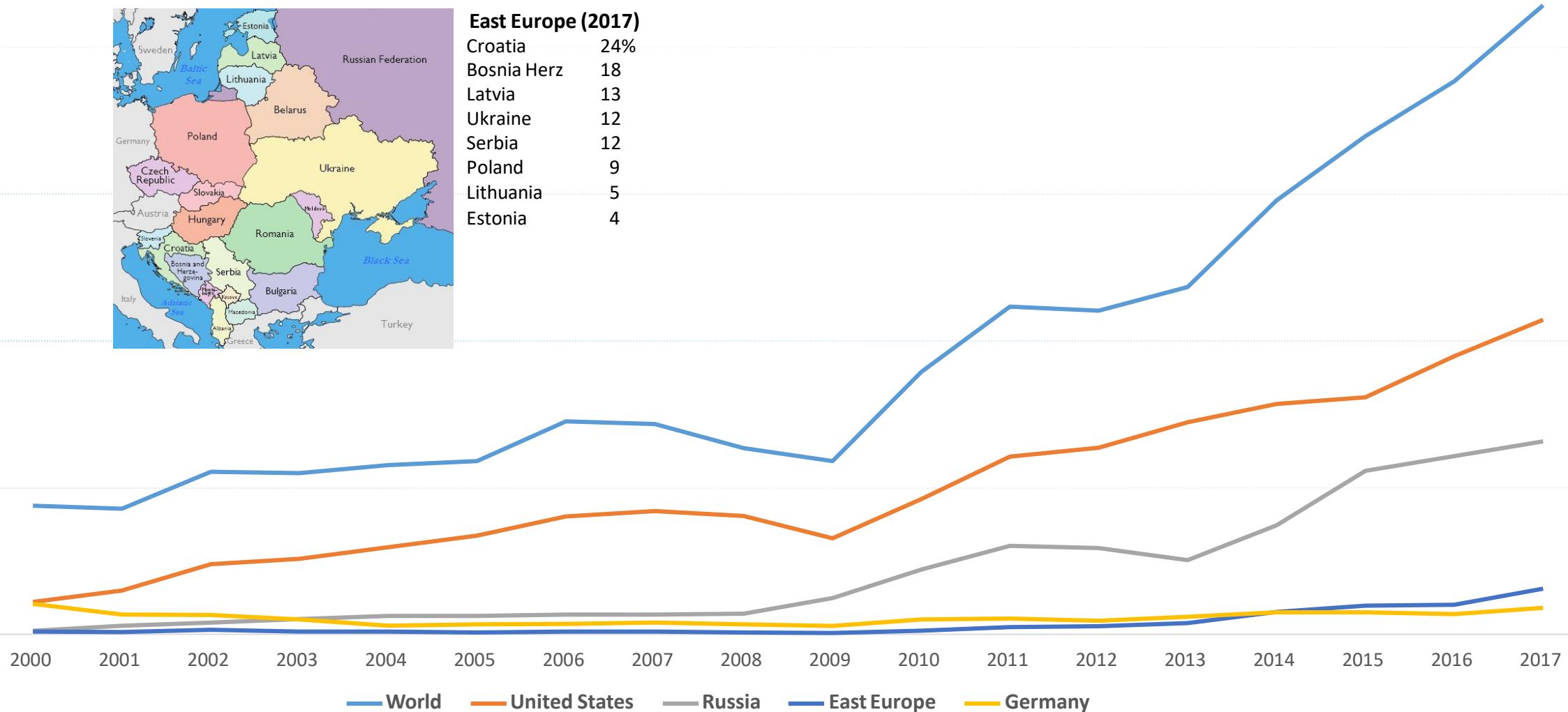
500,000

0



East Europe (2017)

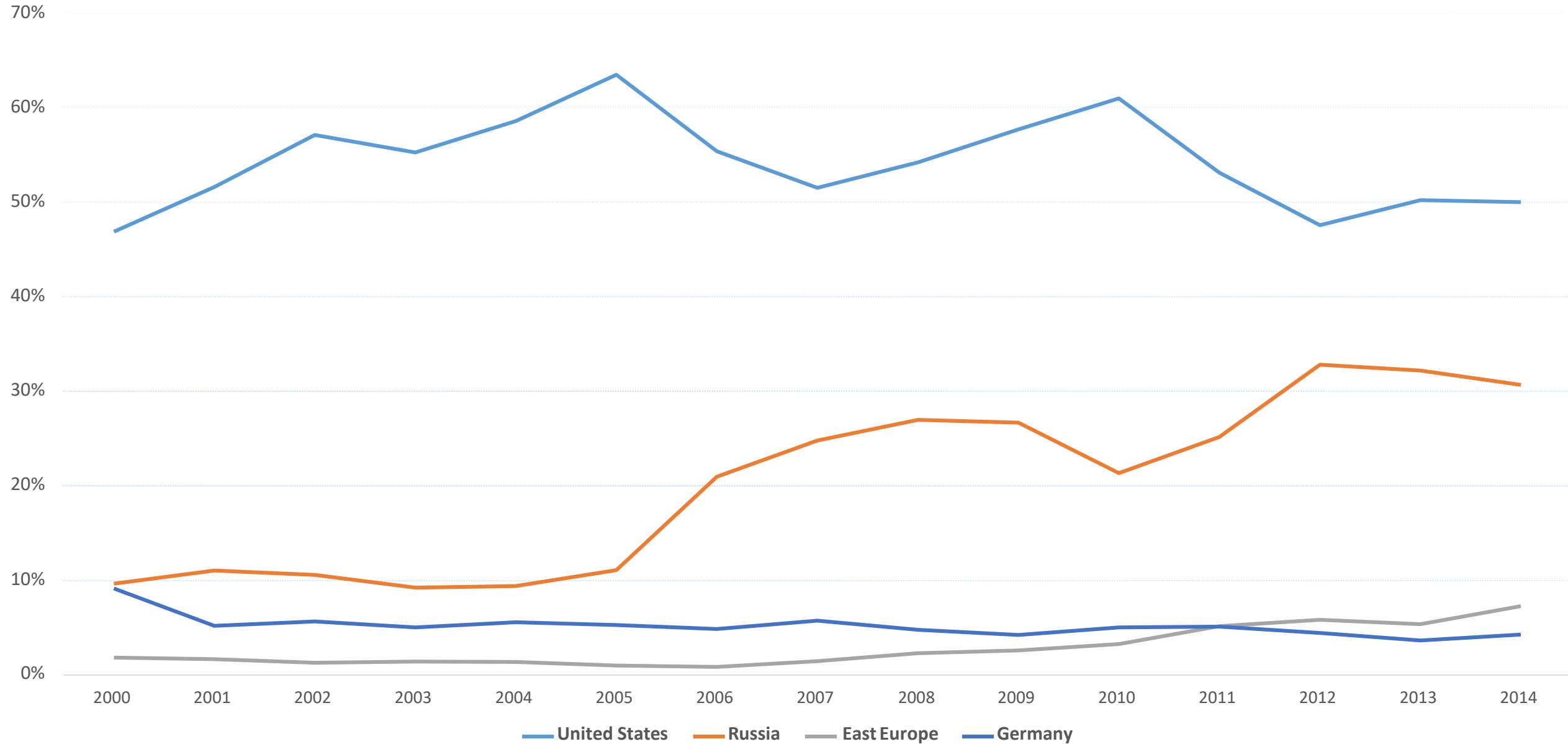
Croatia	24%
Bosnia Herz	18
Latvia	13
Ukraine	12
Serbia	12
Poland	9
Lithuania	5
Estonia	4



China Temperate Hardwood Lumber Imports

Volume Market Share

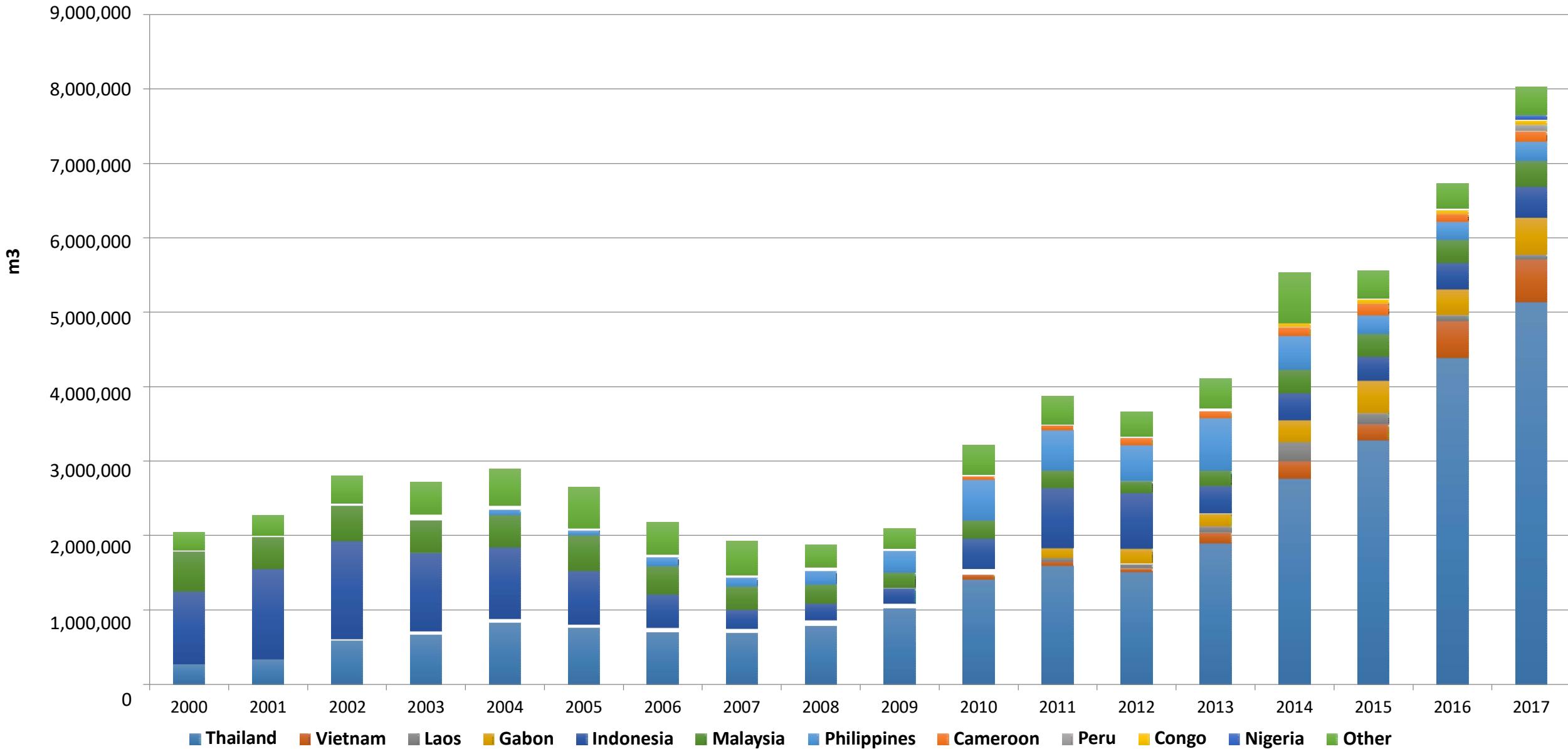
(Source: Global Trade Atlas)



China Tropical Hardwood Lumber Imports by Country

Cubic Meters

(Source: Global Trade Atlas)



China Hardwood Log and Lumber Imports

Cubic Meters; Lumber converted to logs assuming 55% yield

30,000,000

25,000,000

20,000,000

15,000,000

10,000,000

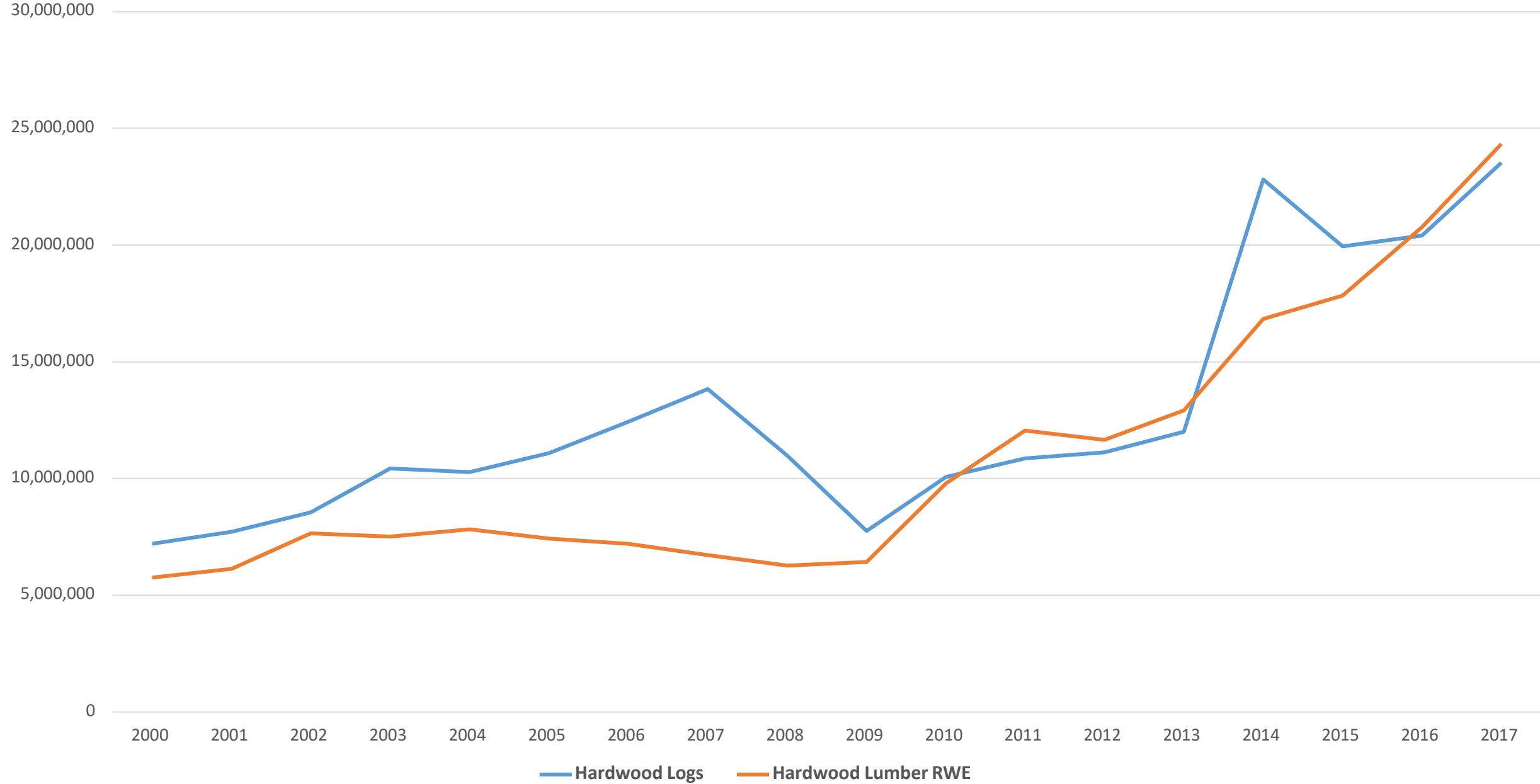
5,000,000

0

Cubic Meters

2000 2001 2002 2003 2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017

— Hardwood Logs — Hardwood Lumber RWE



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Research



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<http://dx.doi.org/10.1098/rspb.2016.2559>

China's fight to halt tree cover loss

Antje Ahrends^{1,2}, Peter M. Hollingsworth², Philip Beckschäfer³,
Huafang Chen^{1,4}, Robert J. Zomer^{1,4}, Lubiao Zhang⁵, Mingcheng Wang^{1,4}
and Jianchu Xu^{1,4}

¹Key Laboratory for Plant Diversity and Biogeography of East Asia, Kunming Institute of Botany, Chinese Academy of Sciences, Kunming 650201, People's Republic of China

²Royal Botanic Garden Edinburgh, 20A Inverleith Row, Edinburgh EH3 5LR, UK

³Chair of Forest Inventory and Remote Sensing, University of Göttingen, Büsgenweg 5, 37077 Göttingen, Germany

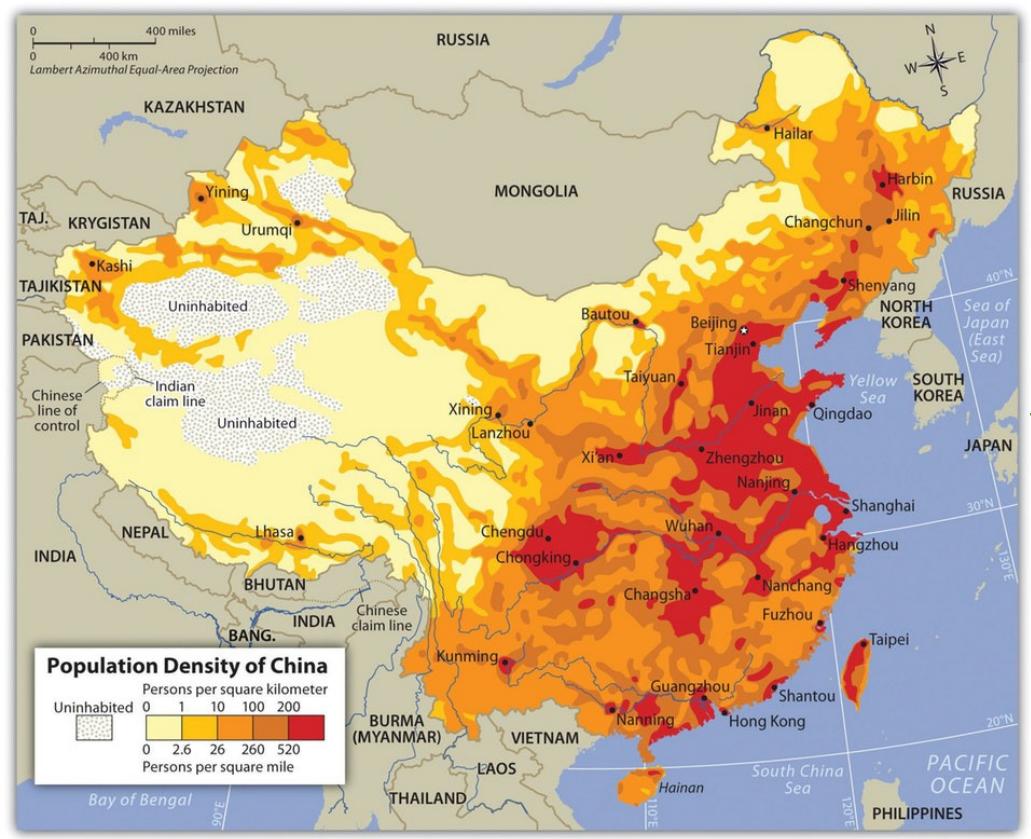
⁴World Agroforestry Centre, East and Central Asia, Kunming 650201, People's Republic of China

⁵Chinese Academy of Agricultural Sciences, 12 Zhongguancun Nan Dajie, CAAS Mailbox 195, Beijing 100081, People's Republic of China

AA, 0000-0002-5083-7760

- Remotely detectable gains of vegetation that non-specialists would view as forest are 7.6% of reported per FAO criteria
- Forest plantations are often established on marginal land; survival and growth rates may be low
- The vast majority of the substantial tree cover gains have occurred in areas with more rainfall and less extreme low temperatures
- Most of China's tree cover remains on sloping lands, while in flat areas as much as approximately 90% of original tree cover may have been lost (and won't be coming back)

Land Suitable for Forest Growth is also Densely Populated





China is and Will Remain the
Largest Importer
of Wood Products in the World



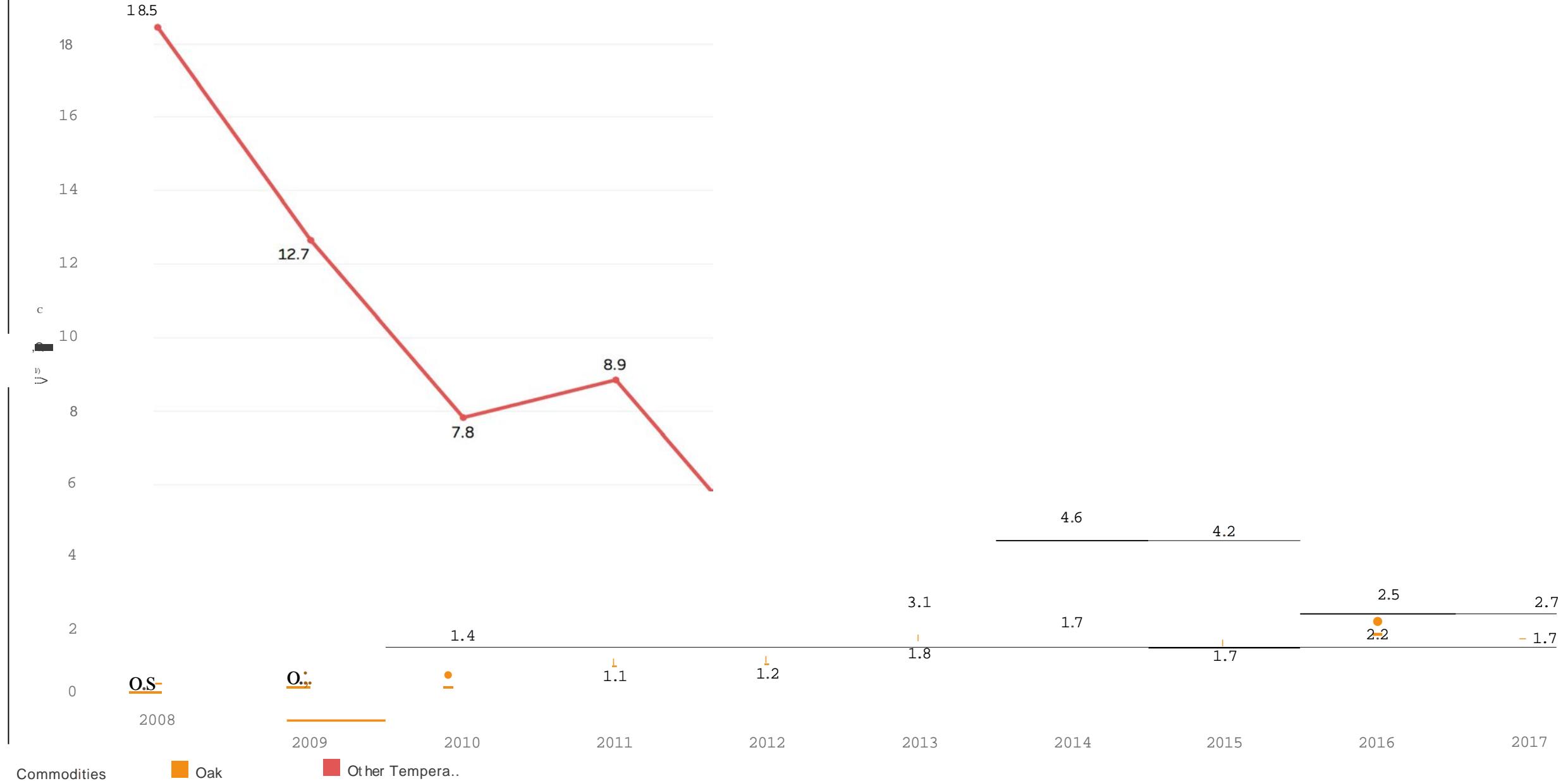
Appendix



Washington State Temperate Hardwood Log Exports

US\$ Million

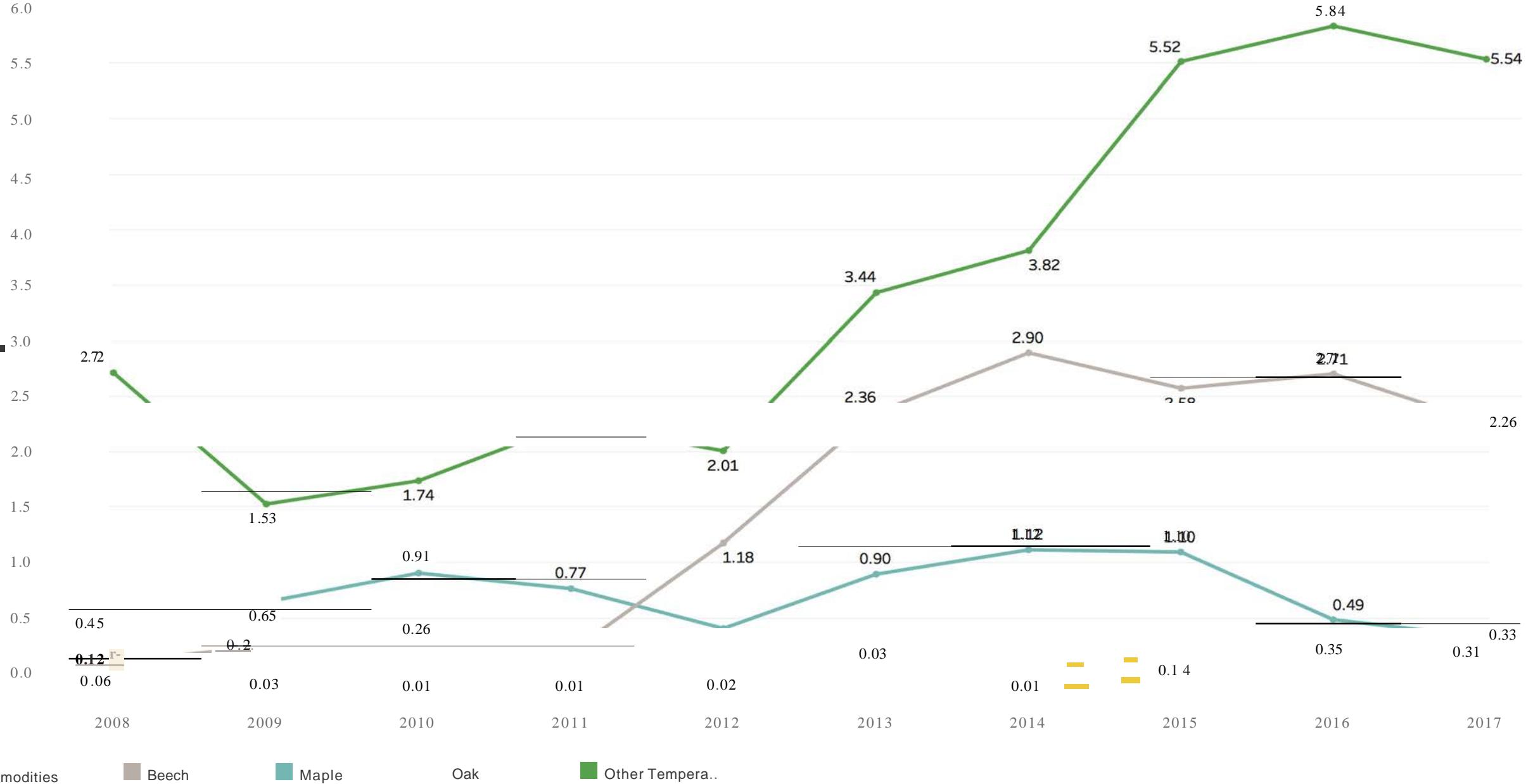
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US\$ Million

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Washington State Temperate Hardwood Log Imports

US\$ Million

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