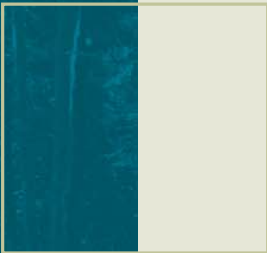




Tropical Timber Market Trends



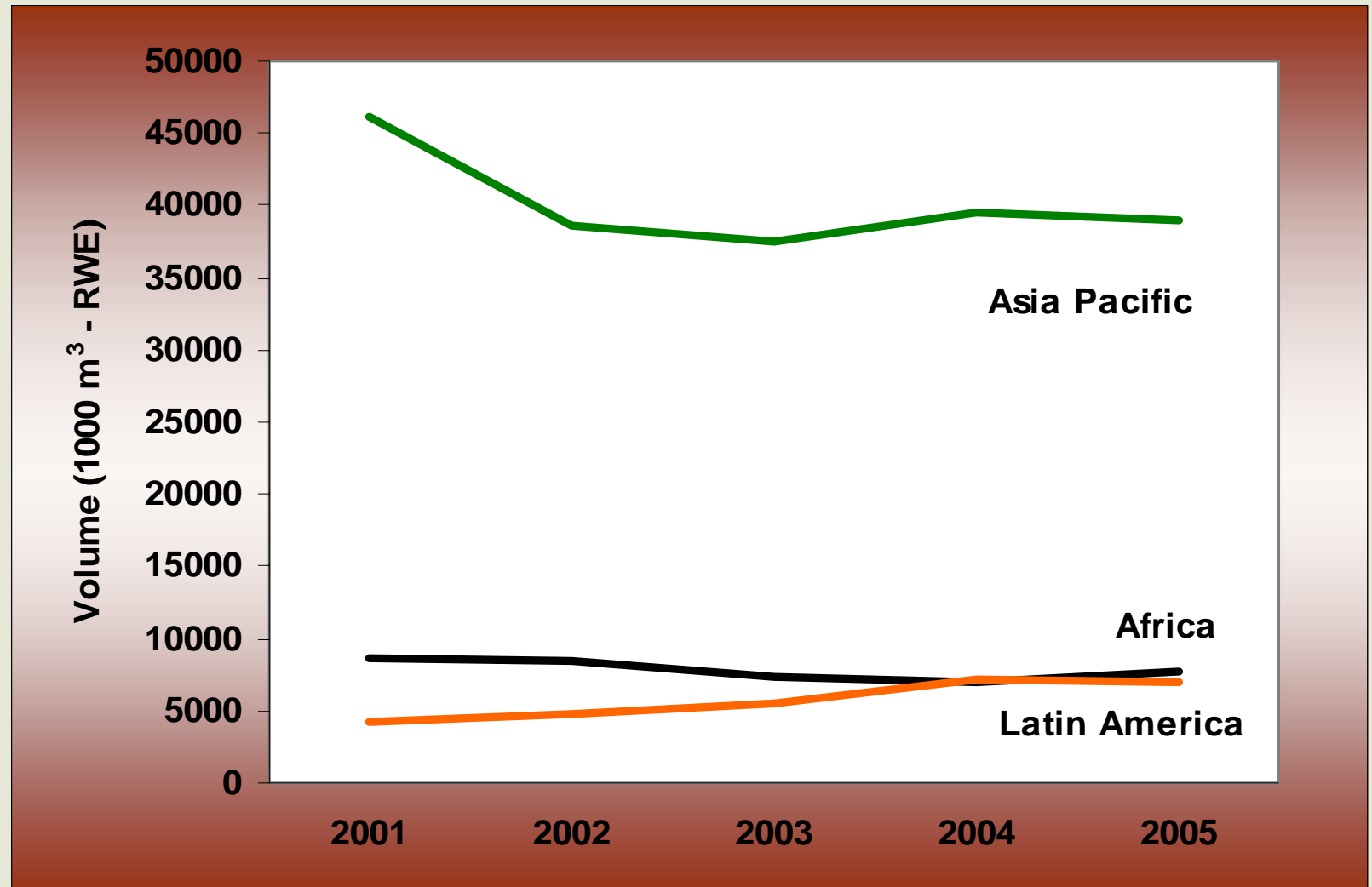
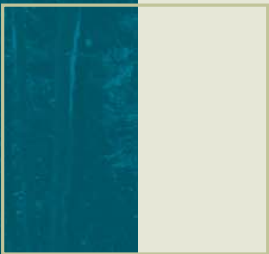


Overview

- **Export trends**
- **Import trends**
- **SPWP trade trends**
- **Current issues**

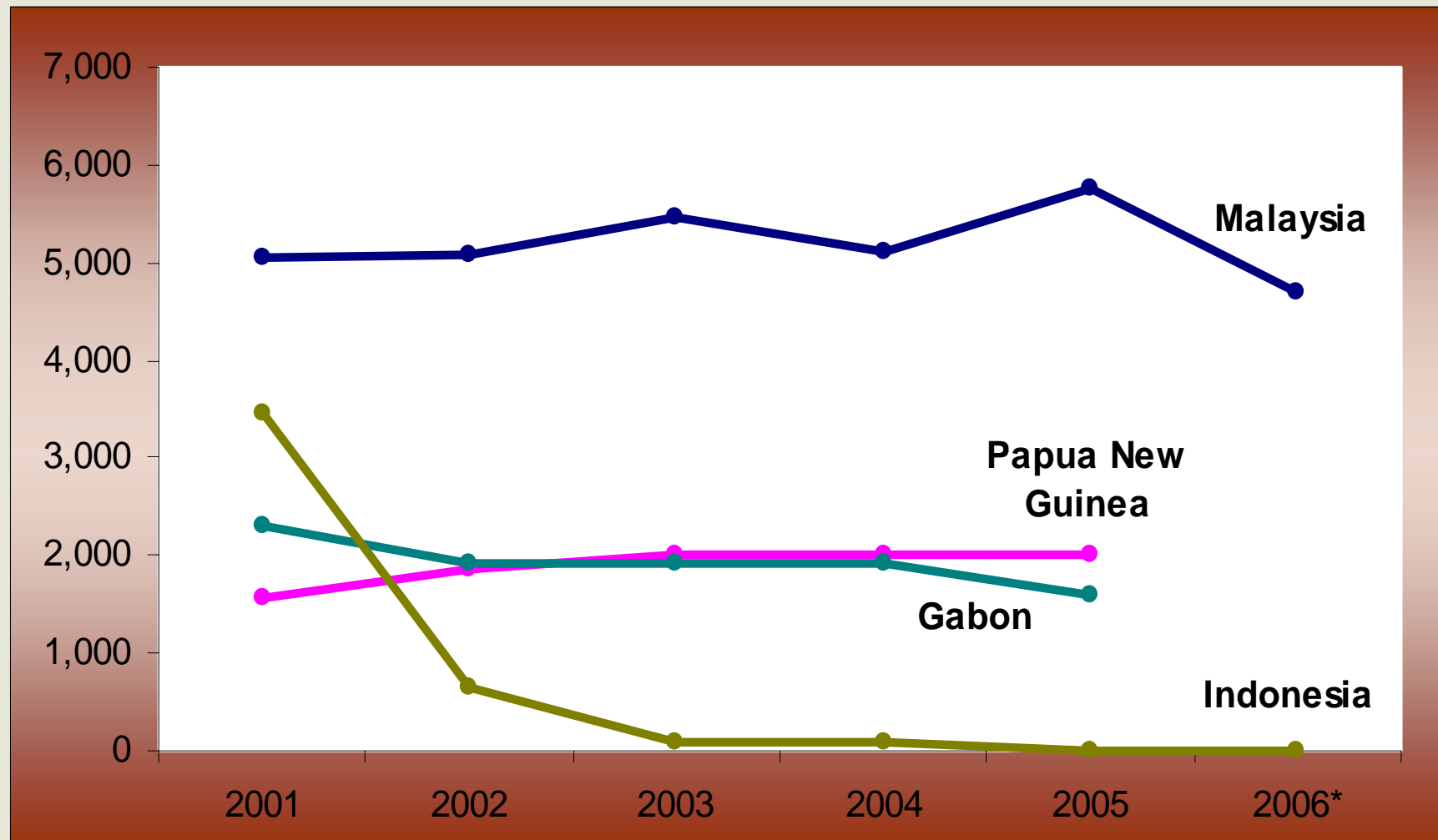


EXPORT TRENDS – PRIMARY TROPICAL



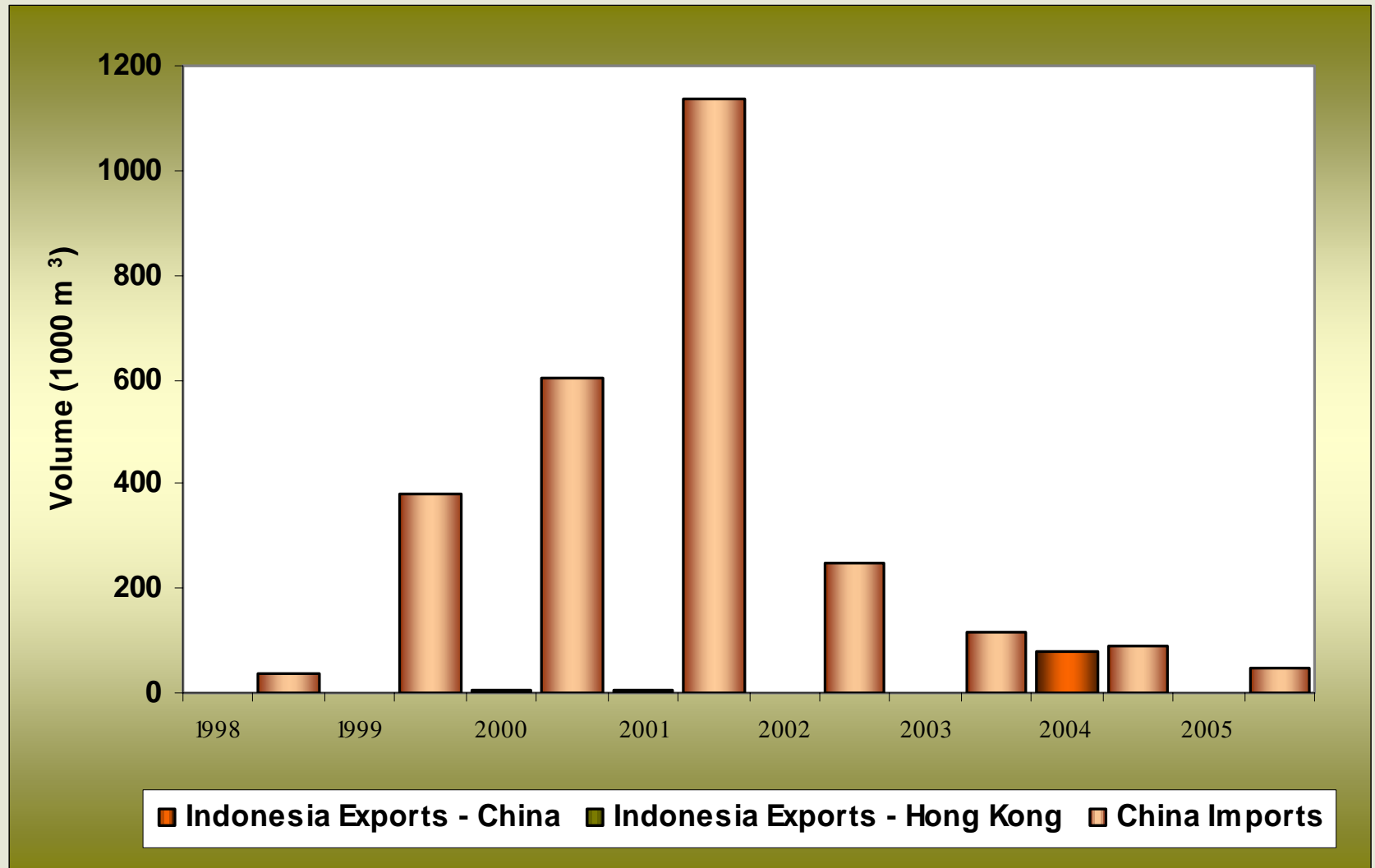


TROPICAL ROUNDWOOD EXPORT TRENDS



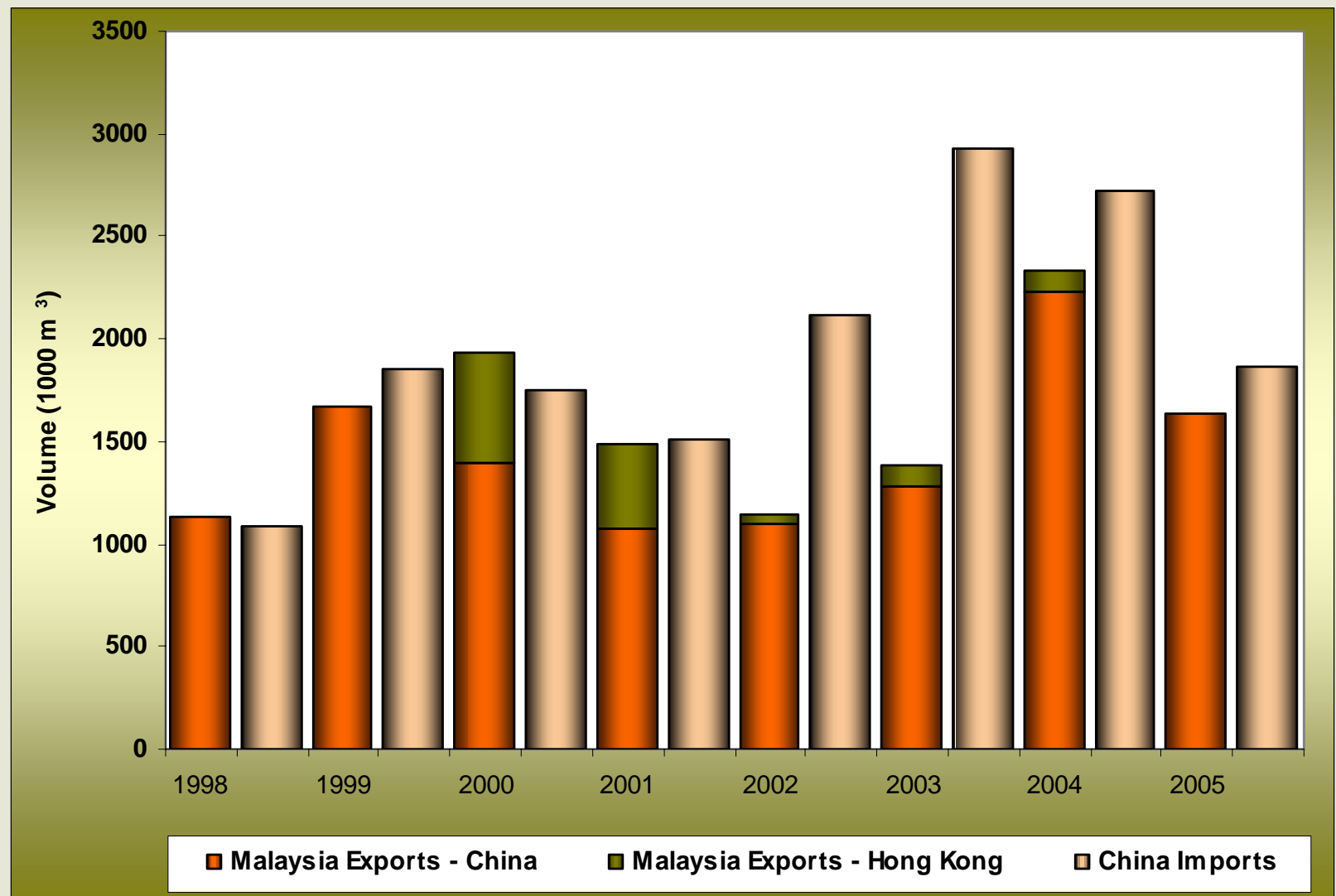


INDONESIA / CHINA LOG TRADE



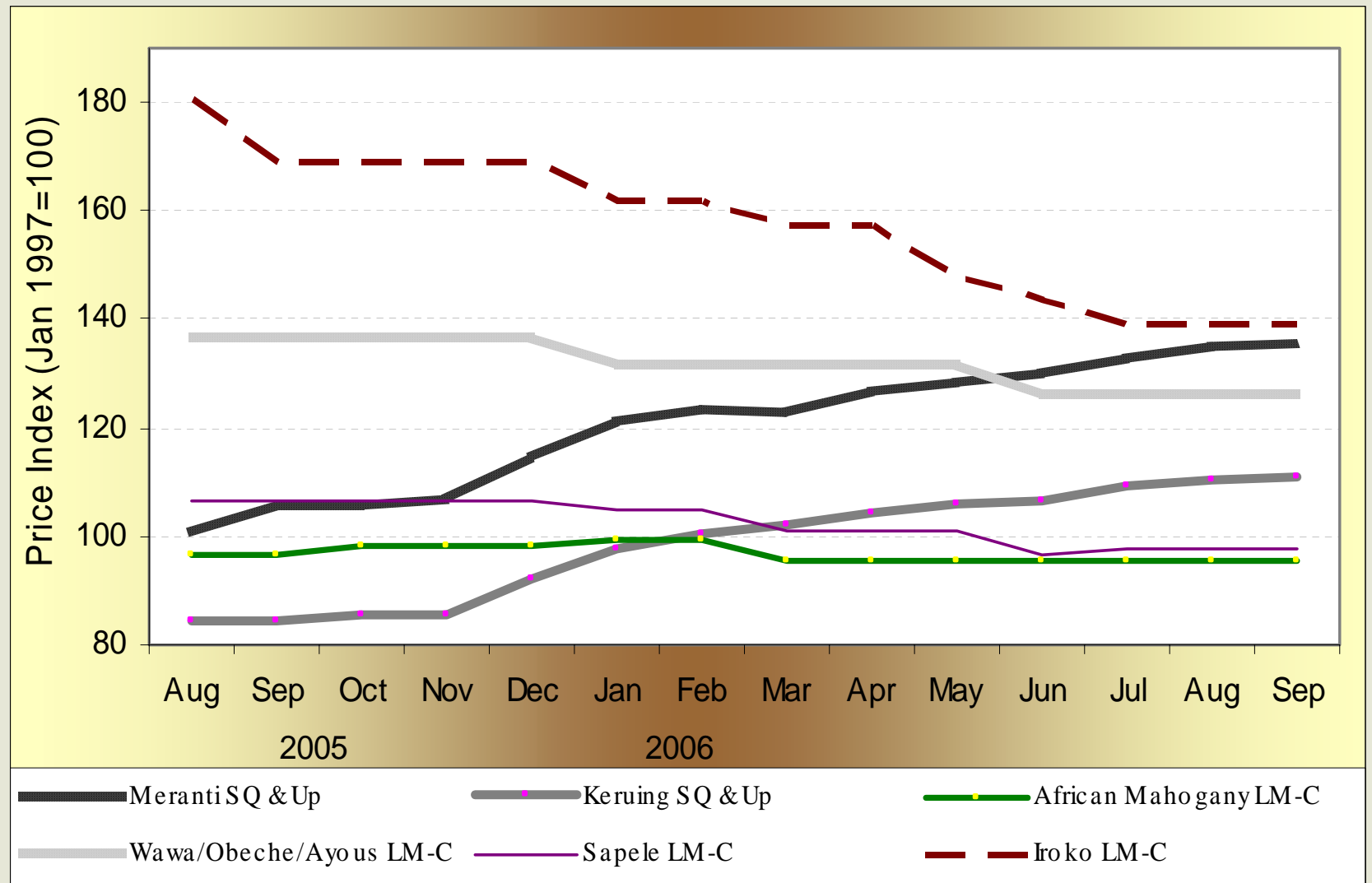


MALAYSIA / CHINA LOG TRADE



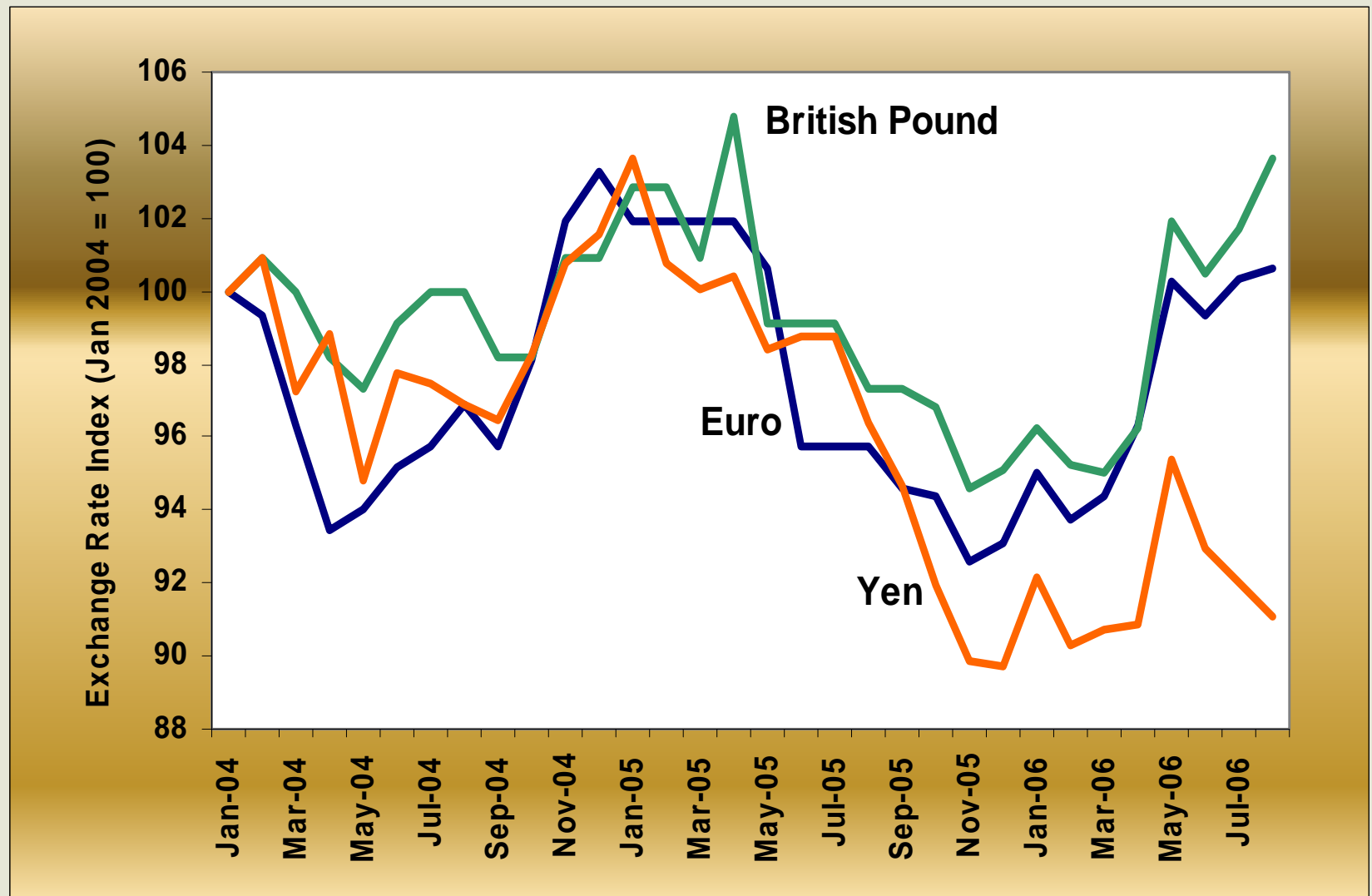
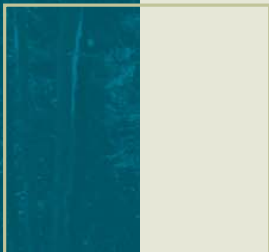


TROPICAL LOG FOB PRICE TRENDS



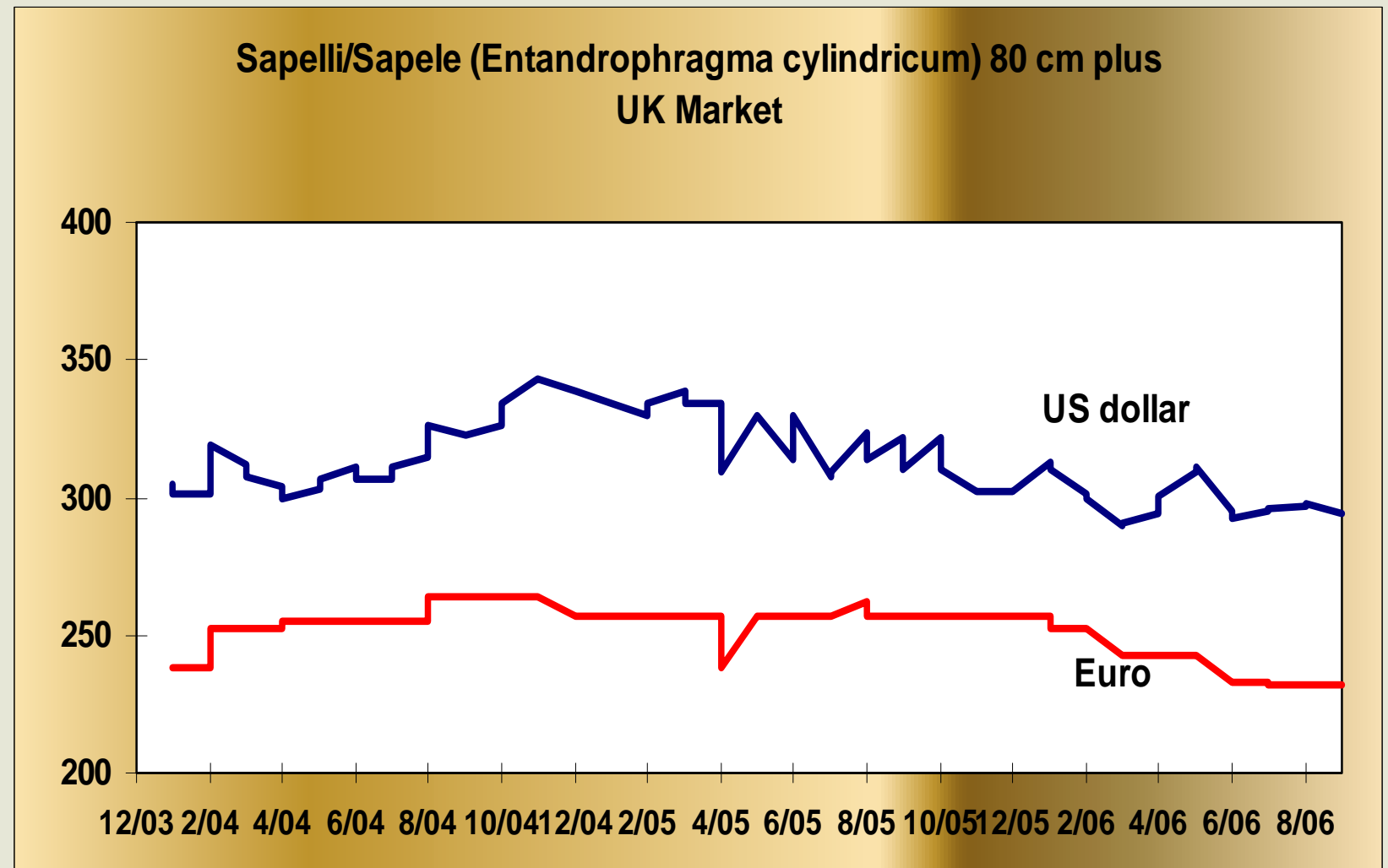
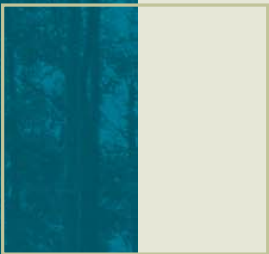


EXCHANGE RATES VS. THE US DOLLAR



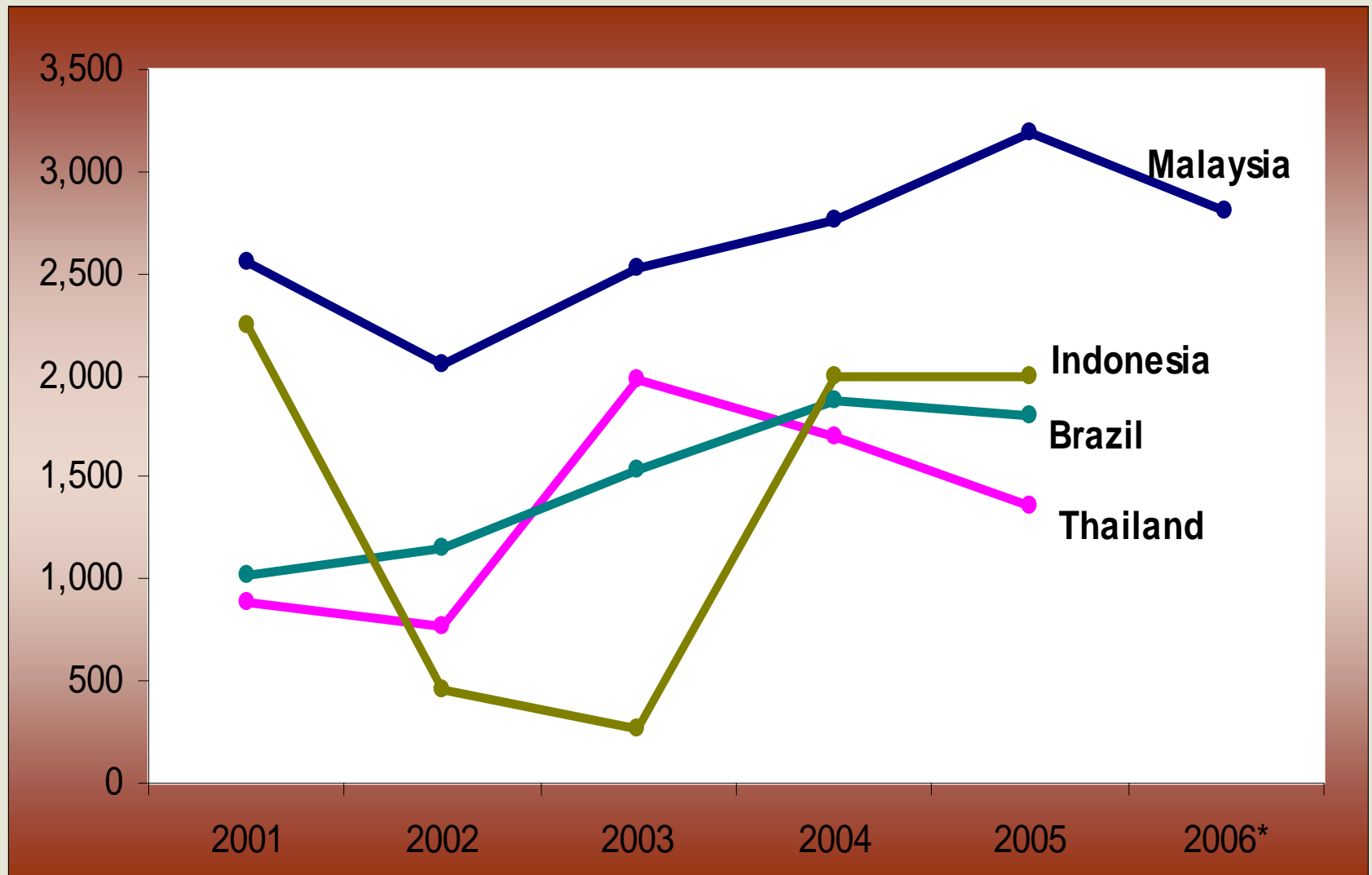
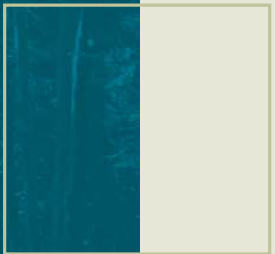


CAMEROON LOG PRICE TREND





TROPICAL SAWNWOOD EXPORT TRENDS



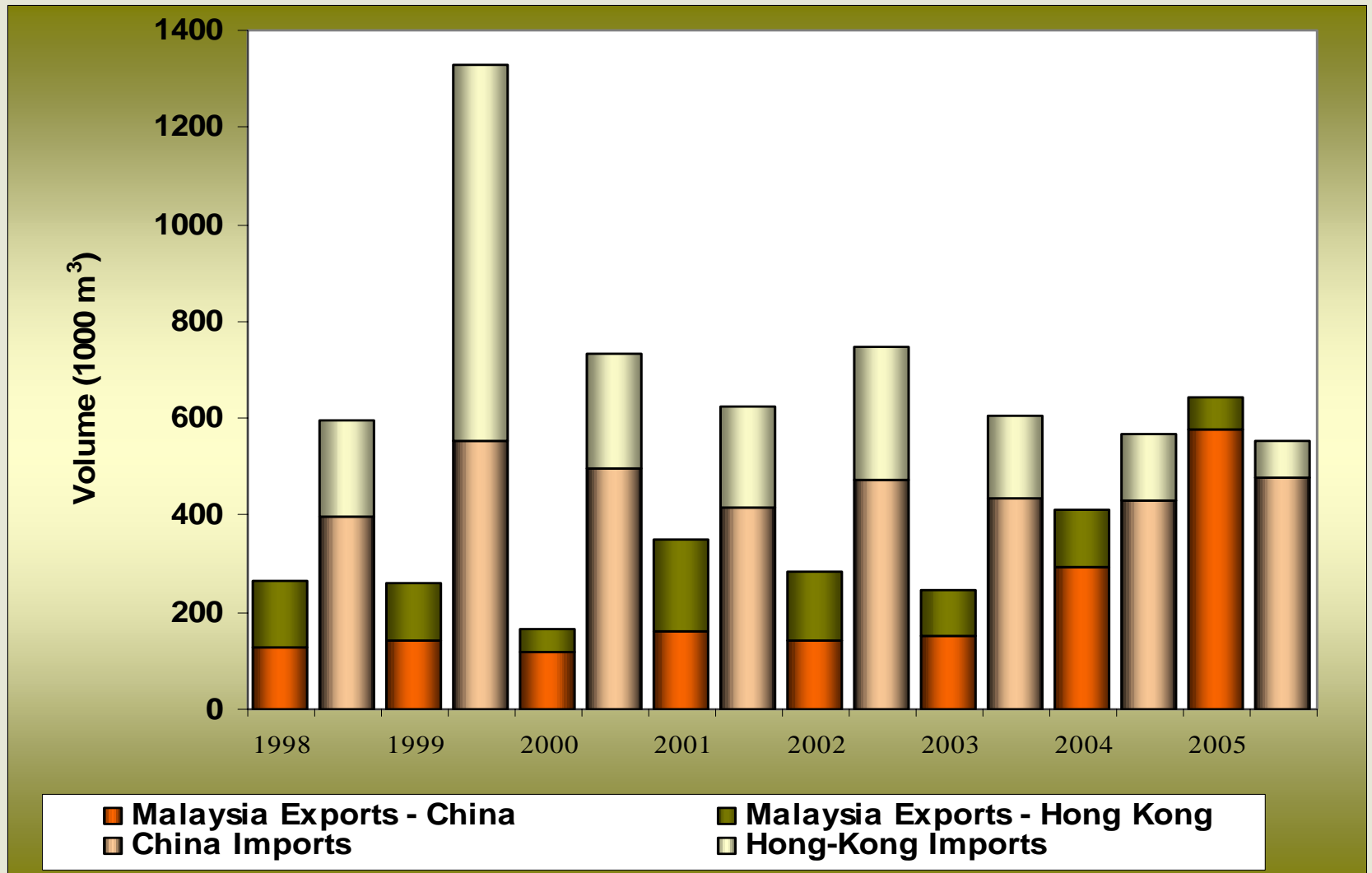


INDONESIA / CHINA SAWNWOOD TRADE



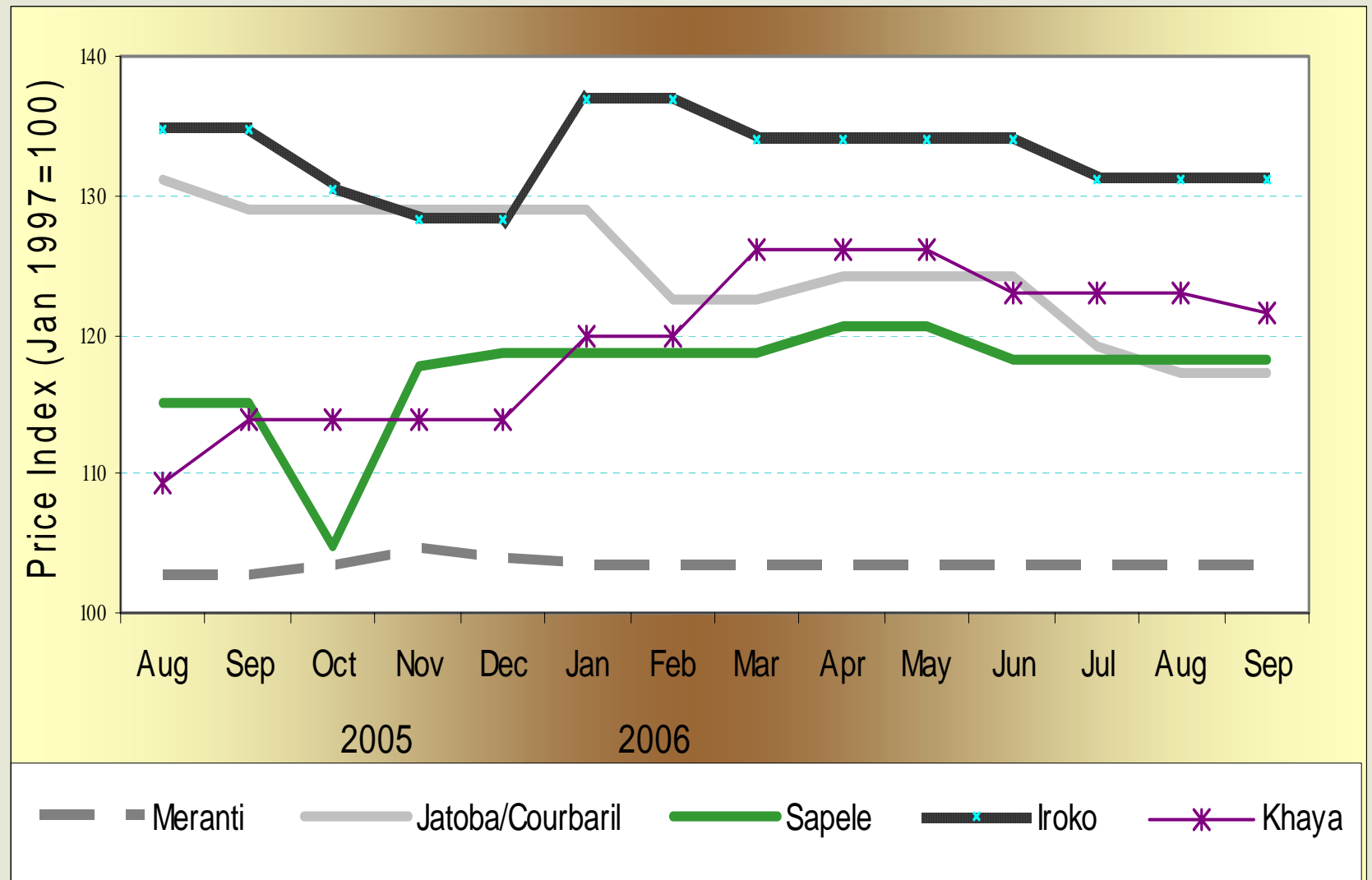


MALAYSIA / CHINA SAWNWOOD TRADE



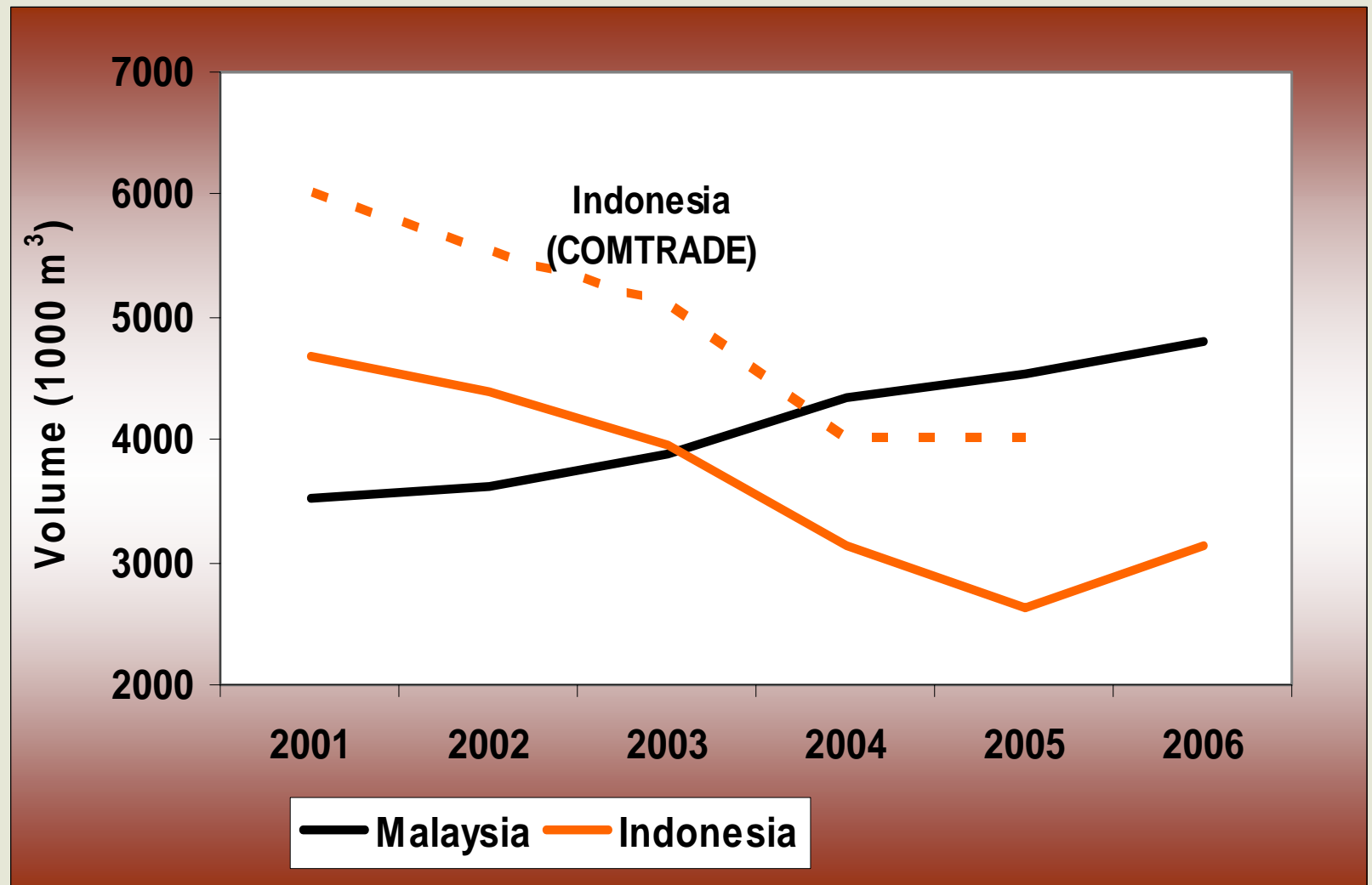


TROPICAL SAWNWOOD FOB PRICE TRENDS





TROPICAL PLYWOOD EXPORT TRENDS





DATA DISCREPANCY BETWEEN SOURCES INDONESIA TROPICAL EXPORTS

		2001*	2002*	2003**	2004***	2005***
Logs	JQ	35	6	1	0	0
	COM	34	6	0	0	N/A
	GTA	2871	1746	3	63	134
	GTA (adjusted)	32	9	0	2	
Sawn	JQ	225	476	266	85	14
	COM	217	475	266	85	N/A
	GTA	29269	103543	27164	7347	988
	GTA (adjusted)	145	205	351	108	
Veneer	JQ	5	4	4	1	1
	COM	5	4	4	1	1
	GTA	307	1551	203	35	132
	GTA (adjusted)	8	4	21	6	
Ply	JQ	4686	4400	3946	3127	3411
	COM	6003	5521	5092	4009	221
	GTA	168254	94970	101066	71789	54169
	GTA (adjusted)	9202	8069	68078	45247	28269

*(source: JQ04) ** (source: JQ05) *** (source: JQ06) Partial data





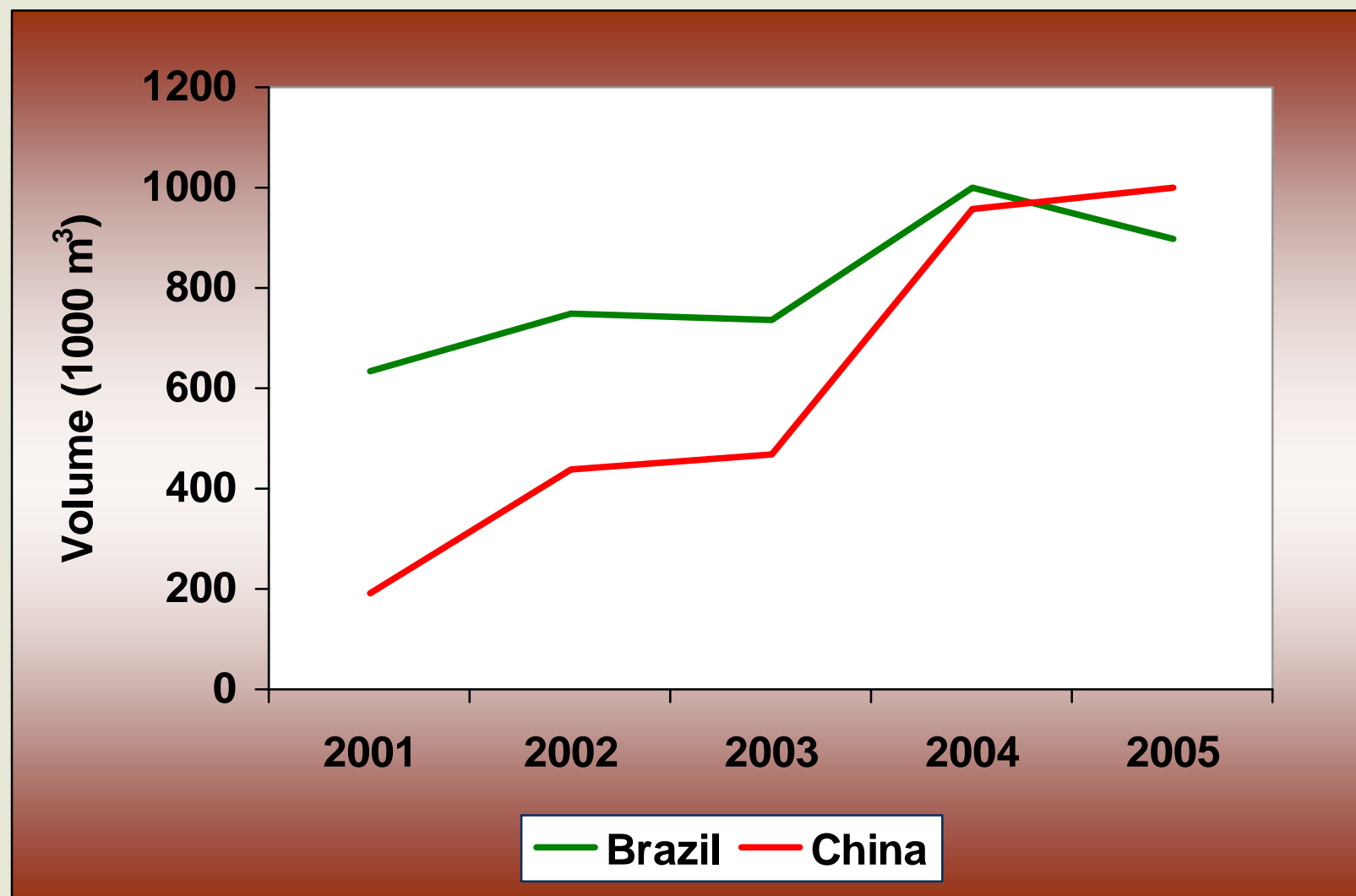
ITTO MEMBERS WITH NO 2004 DATA IN COMTRADE AS OF SEPTEMBER 2006

<i>AFRICA</i>	<i>ASIA PACIFIC</i>	<i>LATIN AMERICA</i>	<i>CONSUMERS</i>
CAR Congo, Dem. Rep. of Congo, Rep. of Côte d'Ivoire Liberia Nigeria	Myanmar PNG Vanuatu	Honduras Suriname Trinidad & Tobago	Nepal



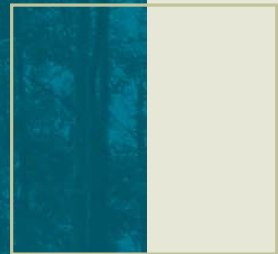
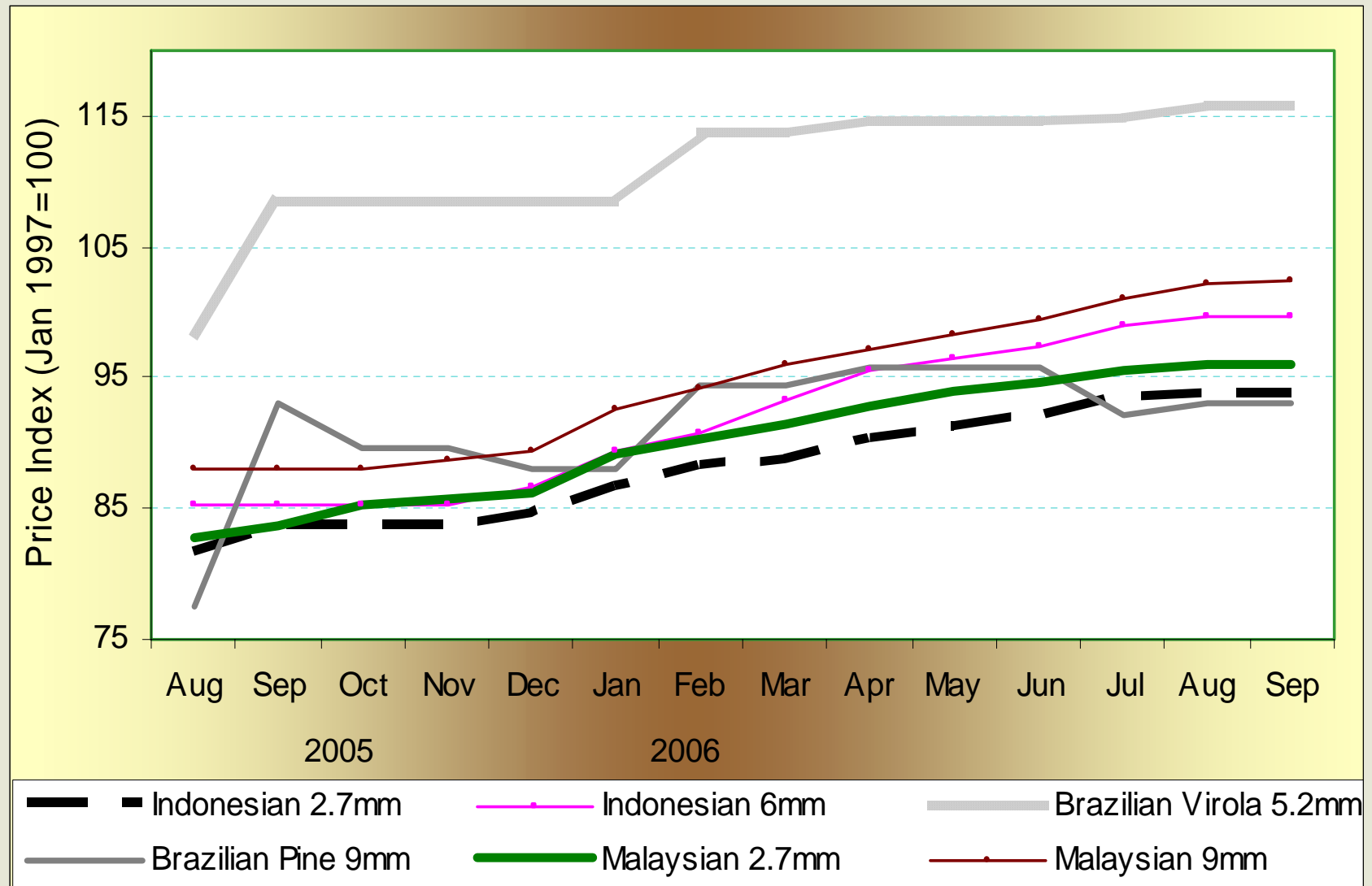


TROPICAL PLYWOOD EXPORT TRENDS



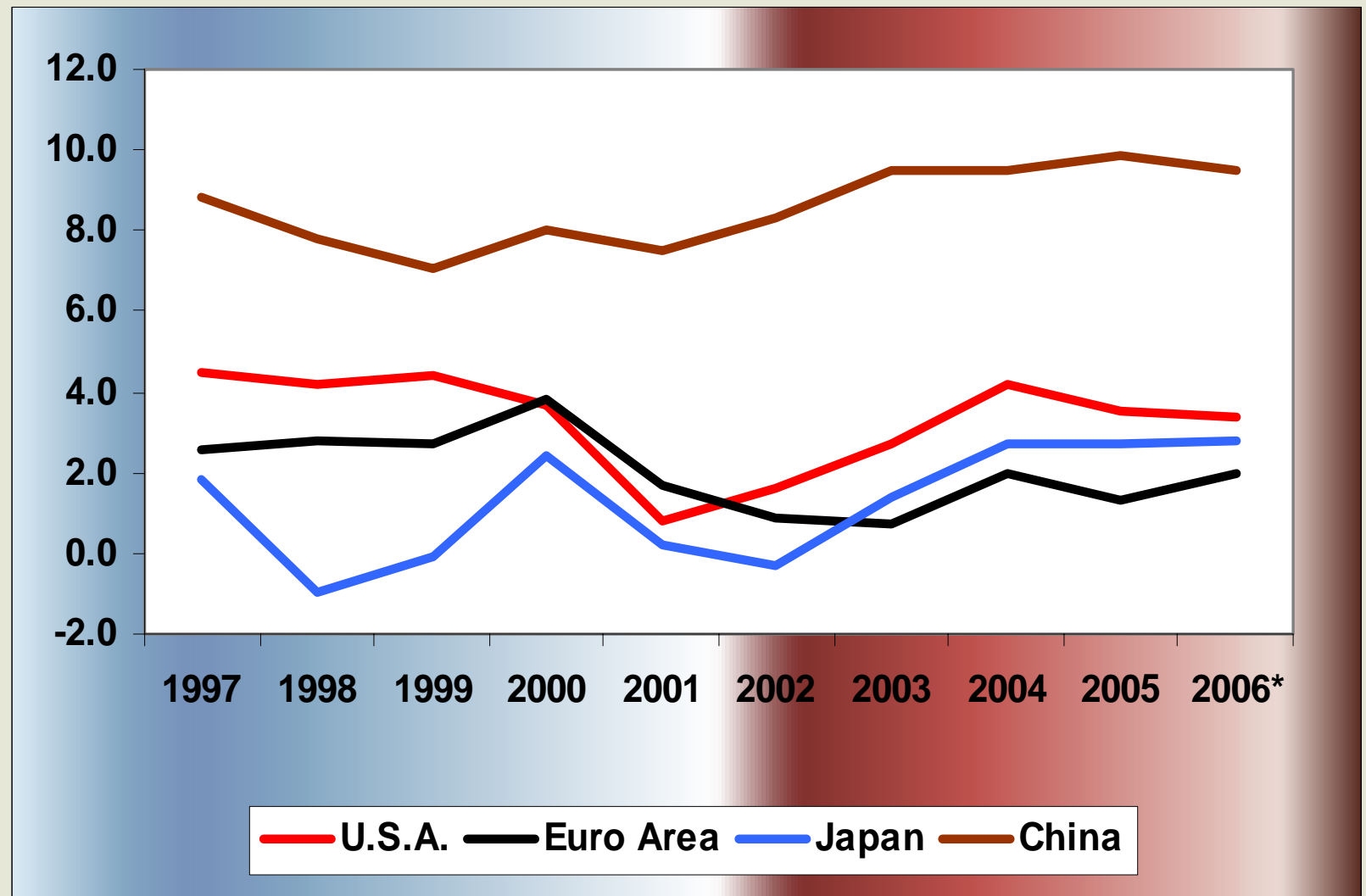
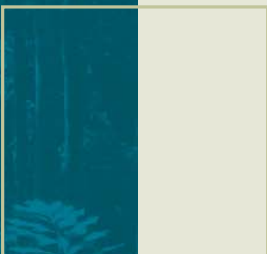
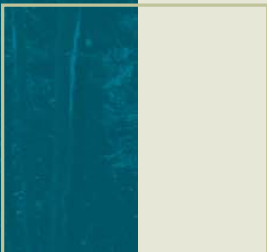
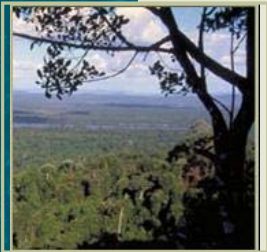


TROPICAL PLYWOOD FOB PRICE TRENDS



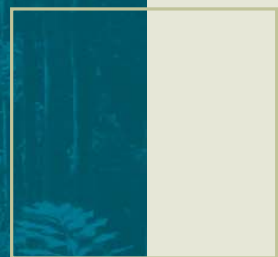
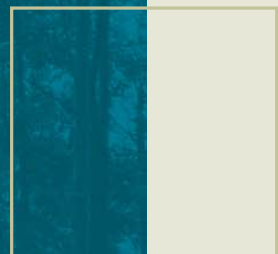
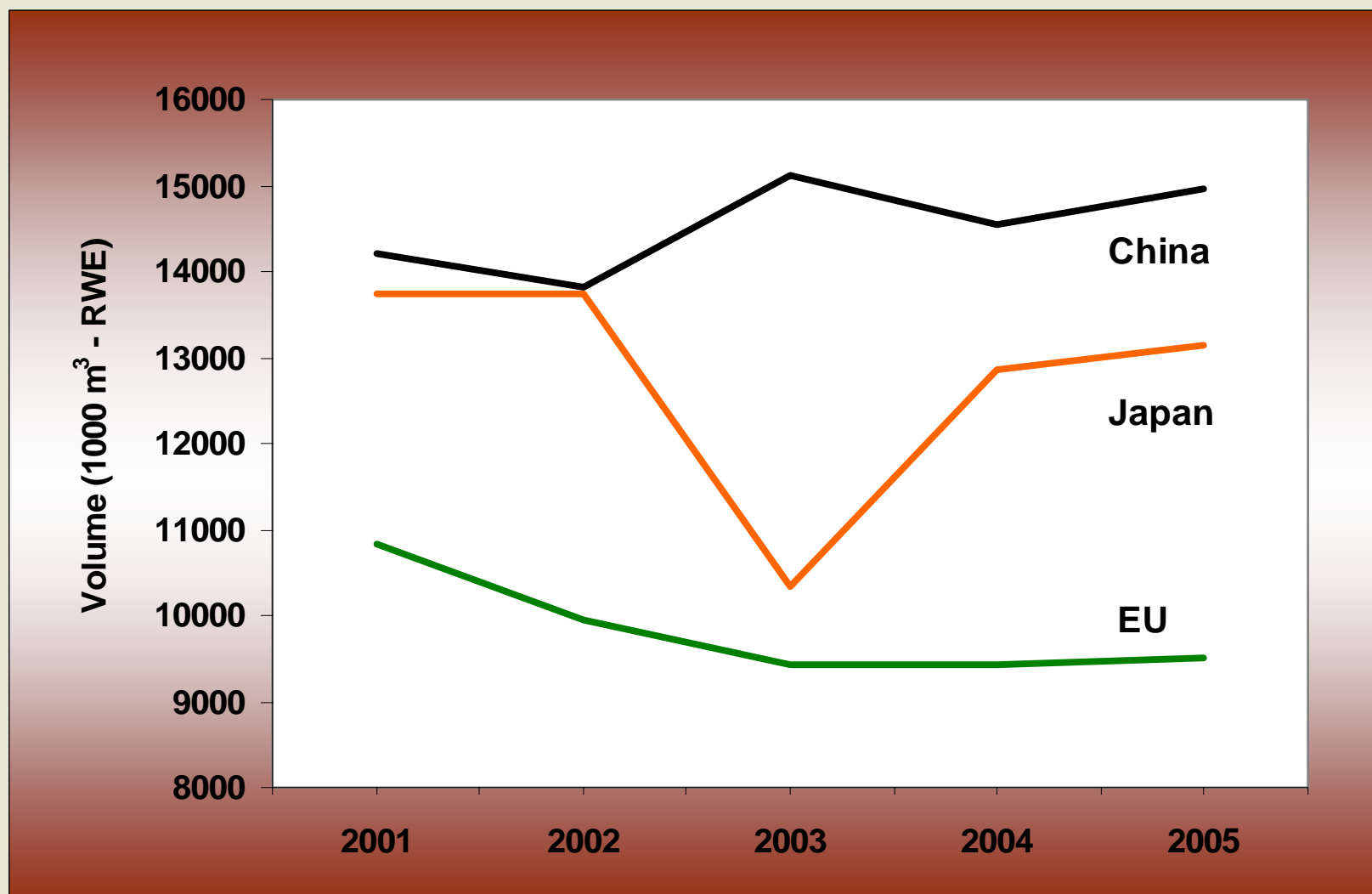


GDP, YEAR ON YEAR % CHANGE CONSUMER COUNTRIES



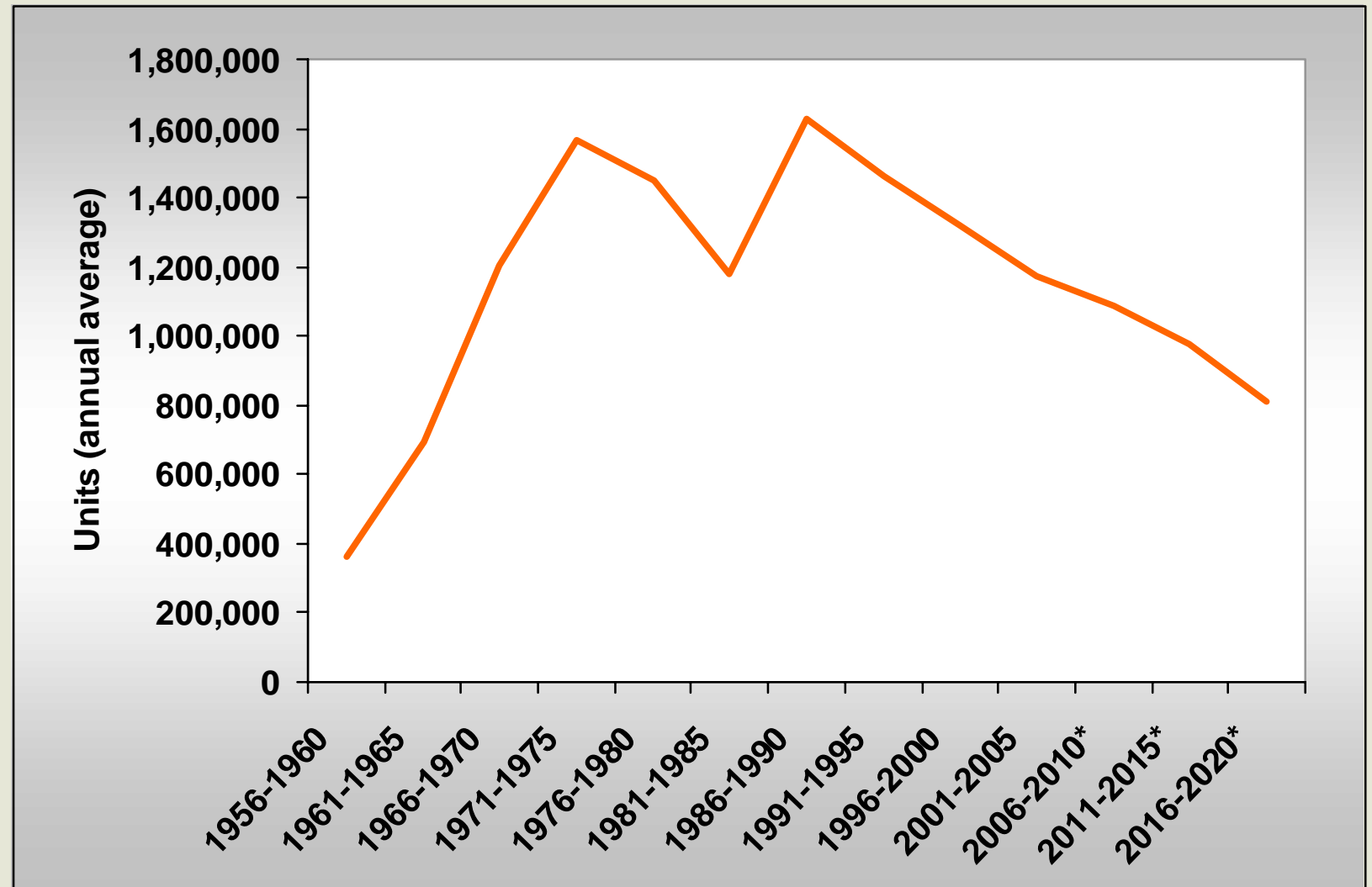


MAJOR IMPORTER TRENDS - PRIMARY TROPICAL



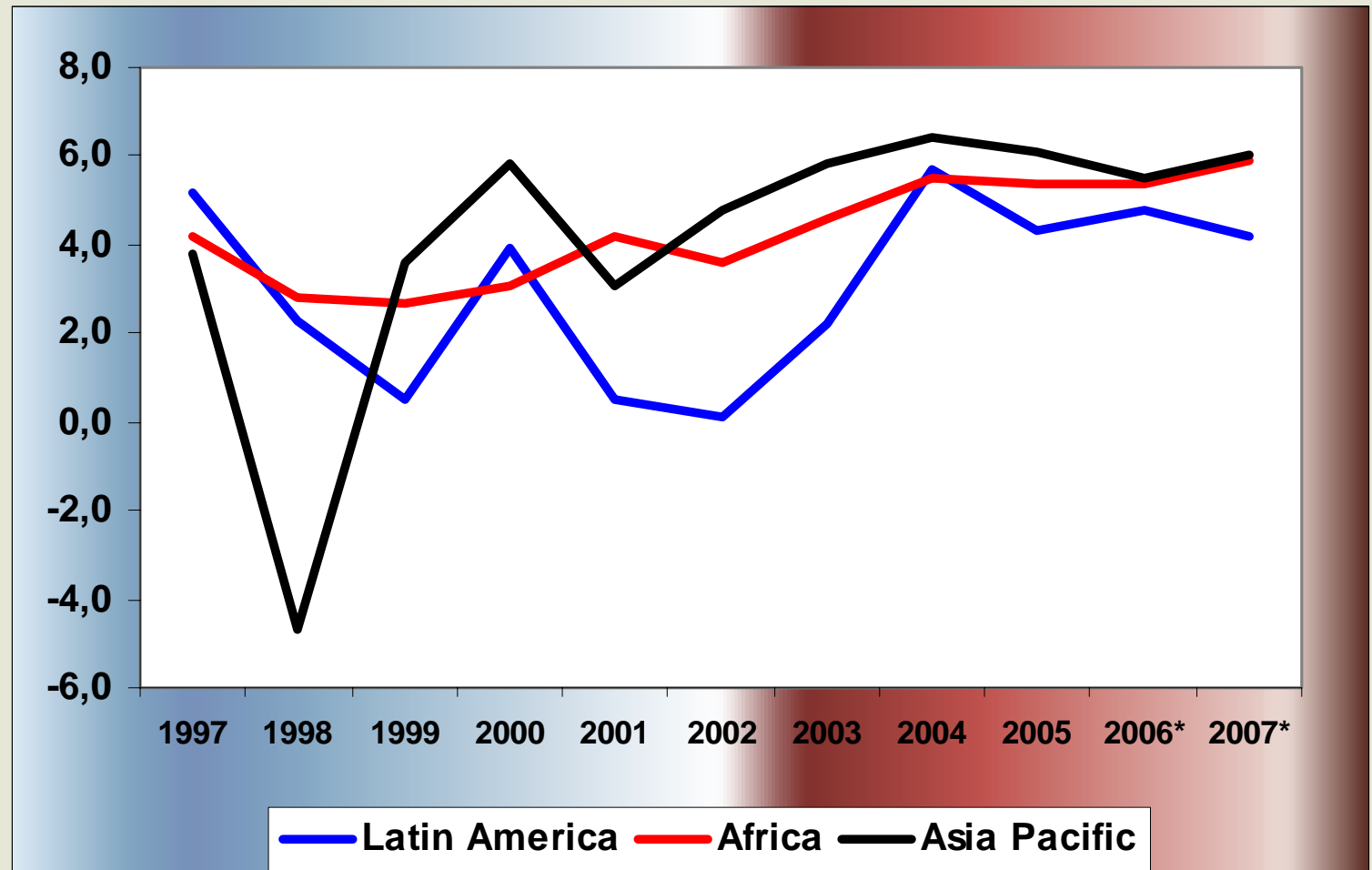


JAPAN HOUSING STARTS AND PROJECTIONS (*)



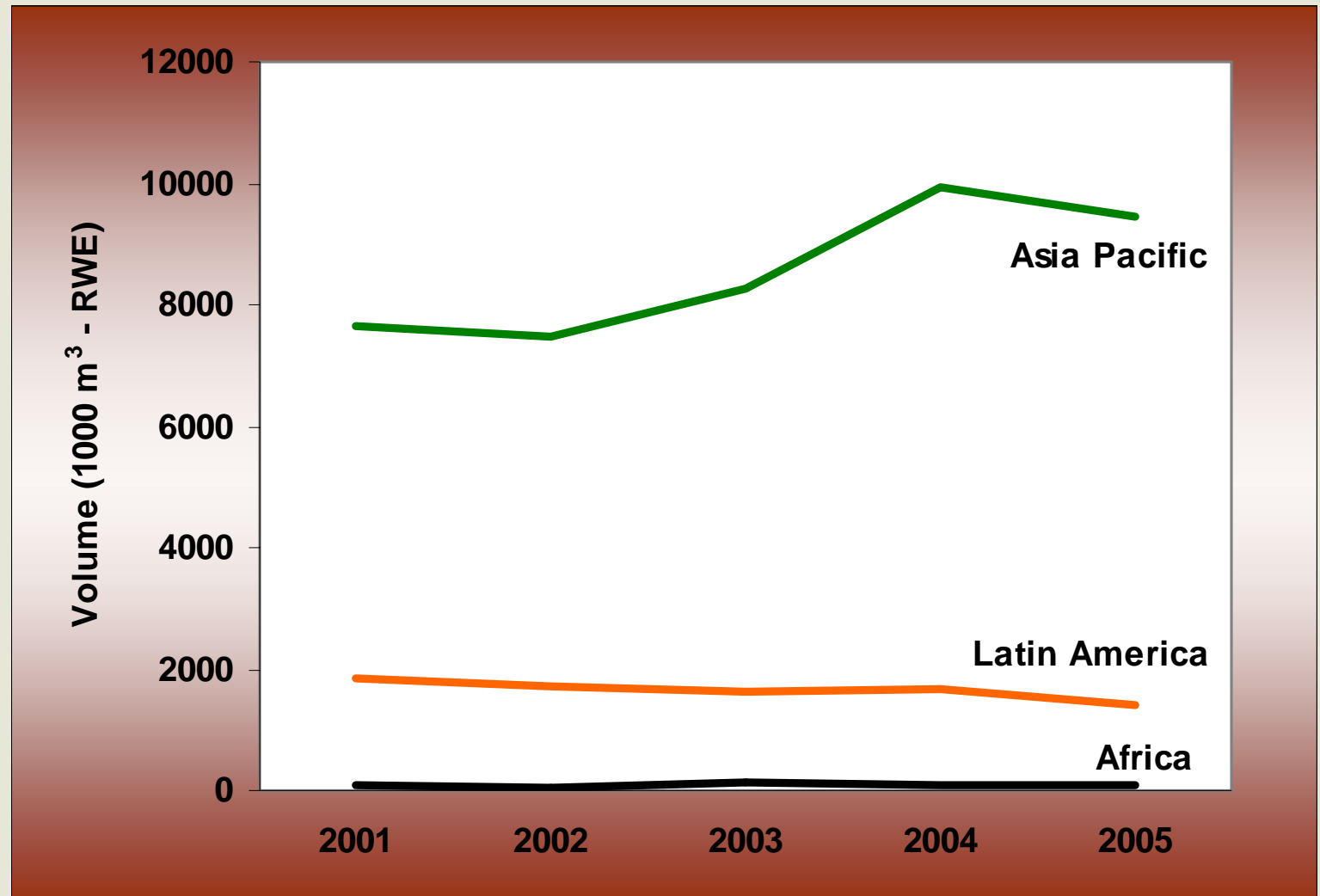


GDP, YEAR ON YEAR % CHANGE PRODUCER COUNTRIES



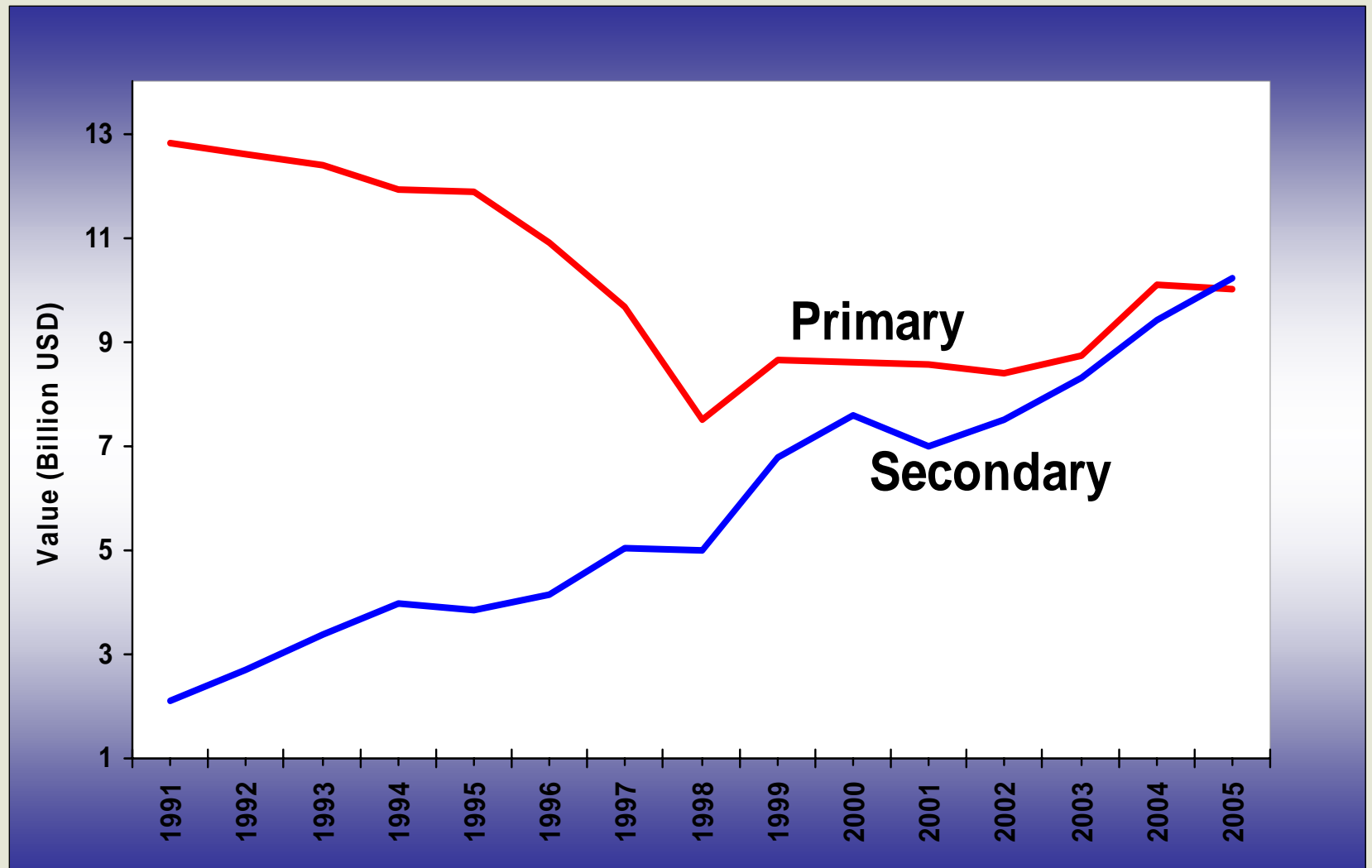
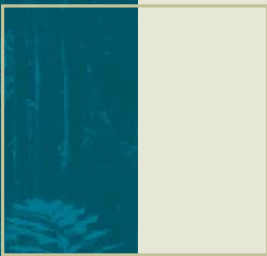
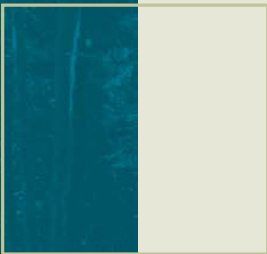


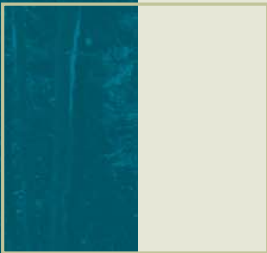
PRODUCER TROPICAL TIMBER IMPORTS





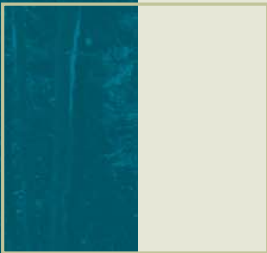
ITTO CONSUMER IMPORTS OF PRIMARY AND SECONDARY TROPICAL TIMBER PRODUCTS





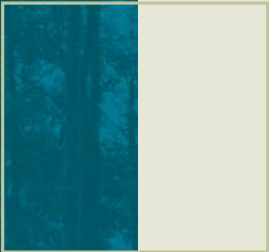
SPWP Exports

- **4 countries (Indonesia, Malaysia, Brazil, Thailand) account for > 80% tropical exports**
- **same countries account for > 90% of \$5 billion exports of tropical pulp, paper, reconstituted panels**
- **most of this \$15 billion + export industry based on plantations, incl. non-tropical conifers in Brazil**



CURRENT ISSUES

- **shift to plantations**
- **ecosystem services, carbon, etc.**
- **market access (certification, legality, PPPs, subsidies, etc.)**
- **new ITTA**



THANK YOU

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