

Research Report on Timber Import in China, 2019-2023

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Abstracts

DESCRIPTION

China is the second largest timber consumer in the world. With the development of China's economy, there is a growing demand for timber from industries of construction, papermaking and furniture manufacturing. However, the timber production grows slowly in China as restricted by timber resources and the rising costs of logging. In Jan. 1, 2017, the Chinese government announced the prohibition on commercial cutting of natural forests. It is estimated that the timber production in China will shrink in the next few years.

From 2013 to 2017, the apparent consumption of timber in China increased by nearly 18% to 192.5 million cubic meters. However, the decrease in the production volume pushed up the import volume. As a result, China's reliance on timber imports rose from 48.4% in 2013 to 56.4% in 2017, and is expected to keep growing in the next few years. In 2017, the import volume of timber in China reached about 108.5 million cubic meters, registering a YOY growth of 16.1%. Softwoods and hardwoods account for about 68% and 32% respectively of China's timber imports. And as labor costs in China are rising, sawn timber is taking up a larger proportion of China's timber imports. The ratio of sawn timber imports to log imports increased from 1:4 in 2007 to 2:3 in 2017.

According to CRI, in 2017, Russia, the U.S., New Zealand and Canada, the four largest sources of China's timber imports, provided 64% of the total import volume of timber in China. In particular, Russia and the U.S. provided about 31% and nearly 10% respectively of the total timber imports. On Aug. 3, 2018, China's Ministry of Commerce announced a 5% to 25% tariff increase on U.S. exports worth USD 60 billion, including a 25% tariff increase on U.S. timber. Evidently, the Sino-U.S. trade war will have certain

impact on China's timber import.

The domestic supply of merchantable timber has been contracting, and China's reliance on timber imports has exceeded 50% since the Chinese government announced the prohibition on commercial cutting of natural forests in 2017. It is expected that the international timber prices will show an upward trend in the next few years as the import volume of timber keeps rising in China. Some Chinese enterprises have begun to invest in the forestry industry in other countries, mainly Russia, to ensure stable and adequate supply of timber. By the end of 2018, more than 100 Chinese enterprises had invested in Russia's forestry industry with a total of over USD 2 billion. And the figures are expected to grow further. The Chinese government has few restrictions on timber import. Therefore, the Chinese market will provide global forestry enterprises with numerous opportunities in the next few years.

TOPICS COVERED:

Supply of and demand for timber in China

Timber import in China

China's reliance on timber imports

Major factors influencing timber import in China

Analysis on the types, volume, sources and prices of China's timber imports

Prospect of timber import in China from 2019 to 2023

Contents

1 OVERVIEW OF TIMBER INDUSTRY

- 1.1 Definition of Timber
- 1.2 Classification of Timber
- 1.3 Chain of Timber Industry

2 DEVELOPMENT ENVIRONMENT OF CHINA'S TIMBER INDUSTRY

- 2.1 Economic Environment of China's Timber Industry
 - 2.1.1 China's GDP and Household Consumption Level
 - 2.1.2 Overview of China's Forestry and Furniture Industries
- 2.2 Policy Environment of China's Timber Industry
 - 2.2.1 China's Policies on Timber Industry
 - 2.2.2 China's Policies on Timber Import

3 ANALYSIS ON SUPPLY OF AND DEMAND FOR TIMBER IN CHINA

- 3.1 Domestic Supply of Timber in China
- 3.2 Demand for Timber in China
 - 3.2.1 Overall Timber Demand
 - 3.2.2 Timber Demand from Construction Industry
 - 3.2.3 Timber Demand from Papermaking Industry
 - 3.2.4 Timber Demand from Furniture Industry

4 ANALYSIS ON TIMBER IMPORT IN CHINA

- 4.1 Import Volume of Timber in China
- 4.2 China's Reliance on Timber Imports
- 4.3 Sources of China's Timber Imports
 - 4.3.1 Major Sources of China's Timber Imports, 2017-2018
 - 4.3.2 Major Sources of China's Timber Imports by Type
 - 4.3.3 China's Timber Imports from Russia
 - 4.3.4 China's Timber Imports from New Zealand
 - 4.3.5 China's Timber Imports from the U.S.
 - 4.3.6 China's Timber Imports from Canada
- 4.4 Analysis on Timber Imports by Type in China

5 ANALYSIS ON LOG IMPORT IN CHINA

- 5.1 Import Volume of Logs in China
- 5.2 Import Value of Logs in China
- 5.3 Average Import Prices of Logs in China

6 ANALYSIS ON SAWN TIMBER IMPORT IN CHINA

- 6.1 Import Volume of Sawn Timber in China
- 6.2 Import Value of Sawn Timber in China
- 6.3 Average Import Prices of Sawn Timber in China

7 PROSPECT OF TIMBER IMPORT IN CHINA, 2019-2023

- 7.1 Major Factors Influencing Timber Import in China
 - 7.1.1 Major Driving Forces and Market Opportunities
 - 7.1.2 Threats and Challenges
- 7.2 Forecast on Import Volume of Timber in China
- 7.3 Forecast on Demand for Timber Imports in China

Selected Charts

SELECTED CHARTS

Chart Classification of Timber in China
Chart Industry Chain of Timber
Chart Total Output Value of China's Forestry Industry, 2013-2017
Chart Sales Revenue of China's Furniture Industry, 2013-2018
Chart China's Import Tariffs on Logs
Chart China's Import Tariffs on Timber
Chart Production Volume of Timber in China, 2013-2017
Chart Consumption Volume of Timber in China, 2013-2017
Chart Import Volume of Timber in China, 2013-2017
Chart China's Reliance on Timber Imports, 2013-2017
Chart Sources of China's Timber Imports in 2017
Chart Sources of China's Timber Imports in 2018
Chart Volume of China's Timber Imports from Russia, 2015-2017
Chart Volume of China's Timber Imports from New Zealand, 2015-2017
Chart Volume of China's Log Imports from New Zealand, 2013-2017
Chart Volume of China's Timber Imports from the U.S., 2015-2017
Chart Volume of China's Timber Imports from Canada, 2015-2017
Chart Types of China's Timber Imports, 2016-2017
Chart Import Volume of Logs in China, 2013-2017
Chart Import Value of Logs in China, 2013-2017
Chart Average Import Prices of Logs in China, 2013-2017
Chart Import Volume of Sawn Timber in China, 2013-2017
Chart Import Value of Sawn Timber in China, 2013-2017
Chart Average Import Prices of Sawn Timber in China, 2013-2017
Chart Forecast on Import Volume of Timber in China, 2019-2023

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