INTERNATIONAL TIMBER TRADE

An introduction

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Background: Forester, economist

Research: Trade, urbanization, bioeconomy, modelling

In charge of the **DA Forest Information and Resource Strategies** (DA FIRS)

In charge of the **UE Filière Forêt-Bois et Commercialisation des Produits Forestiers** (2A D1N)

Forest Information and Resource Strategy (DA FIRS)

Objective: Integrating forest information systems, forest economics, and forest policies to secure resources from forest systems in a changing world.

Partnership AgroParisTech x Géodata Paris, combines forest information sciences, forest sciences and social sciences for the study of resources at large scales.

In **English,** in **Nancy**, starting in **2026**

UE “FAR WEST”

- 18/09 | Qualité et classement des bois
- 12/11 | Commerce inter. (round 1)
- 18/11 | Gestion des forêts tropicales
- 21/11 | Commercialisation des bois + Acteurs de la filière
- 05/01 | Commerce inter. (round 2)
- 14/01 | Visites de scieries
- 16/01 | Commerce inter. (round 3)

OBJECTIVES

A course on international timber trade

1. Taking a step back: from France to international forest issues.
2. International trade data for wood products: scope and limits.
3. Data storytelling: what do the data say?
4. A game of trade: theoretical intuitions on trade mechanisms.

WHAT IS THE PLACE OF SUCH A COURSE IN AN YOUR TRAINING?

Why do we teach you this?

1. A forest engineer is trained to understand/analyze complex systems:

- Open systems
- Systems that evolve over time
- Systems with complex spatial and temporal structures

Why do we teach you this?

2. Forest engineers will have to make decisions and formulate solutions in a context of ecological, social and economic **uncertainty**.

Part of economic uncertainty comes from international interactions and trade.

Why do we teach you this?

3. Link with the operational aspects of your future jobs:

- Working with timber traders,
- Influence of international policies,
- Pressure of international competition…

Outline

Definition and scope

The big picture

Wood trade data

Structure and recent dynamics

Conclusion

01 Introduction: Definition and scope of the international wood trade


Time to shine!

How would you define the international wood trade?

- A:
- B:
- C:
- D:

International timber trade:

Exchange of timber products between different countries.

INTERNATIONAL ECONOMICS

The study of international trade and monetary issues

International trade

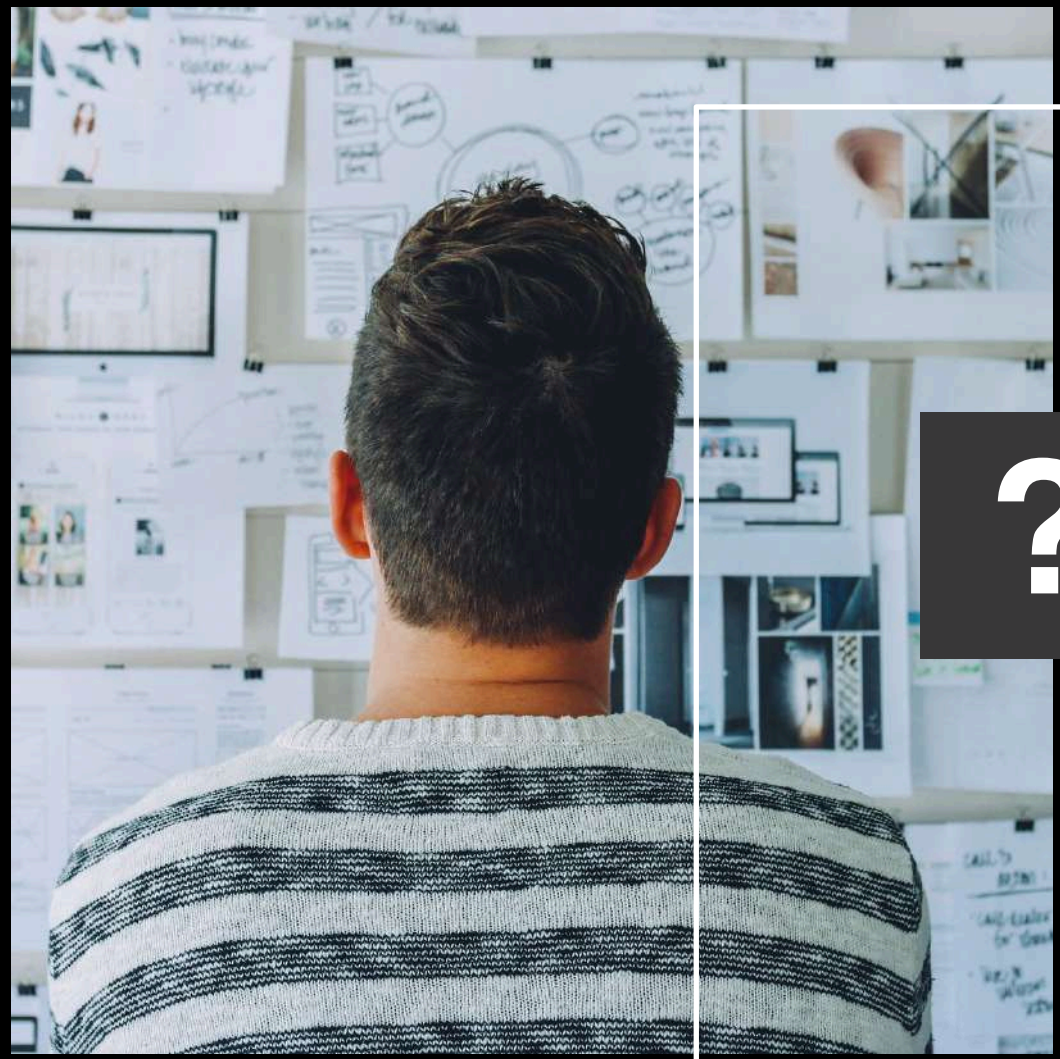
Structure of international trade, trade gains, protectionism...

International economics

Study of economic interactions between sovereign states

International finance

Capital market, balance of payments, exchange rates...



?

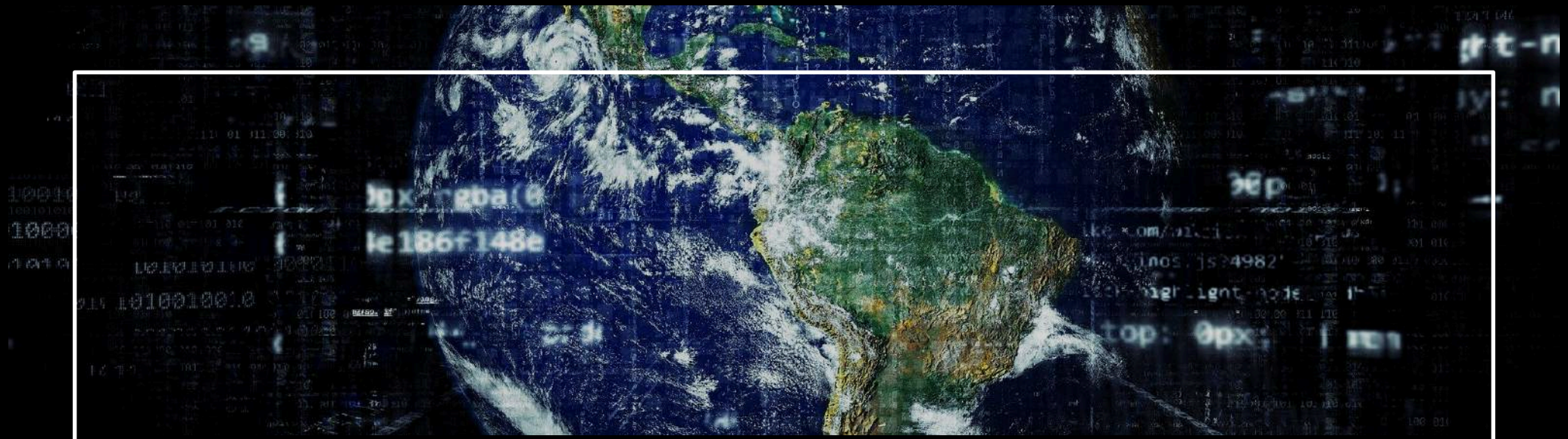
INTERNATIONAL ECONOMICS

What are the respective merits of free trade and protectionism?

Why do some countries accumulate trade deficits or surpluses, and how do these imbalances resolve themselves?

What are the underlying causes of currency and banking crises and how can they be remedied?

How can the state fight unemployment and inflation and what are the constraints on economic policy for a country open to the world? ...



FULL FOOT IN GLOBALIZATION

Growing international trade: lower transportation costs, removal of trade barriers, fragmentation of the production process, dvp. of cultural exchanges.

Growing financial transactions, facilitating portfolio diversification, but leading to increased fragility.

New means of communication.

Global financial crises, the spectacular rise of China, the construction of Europe...

A dusty paradigm?

A dusty paradigm?

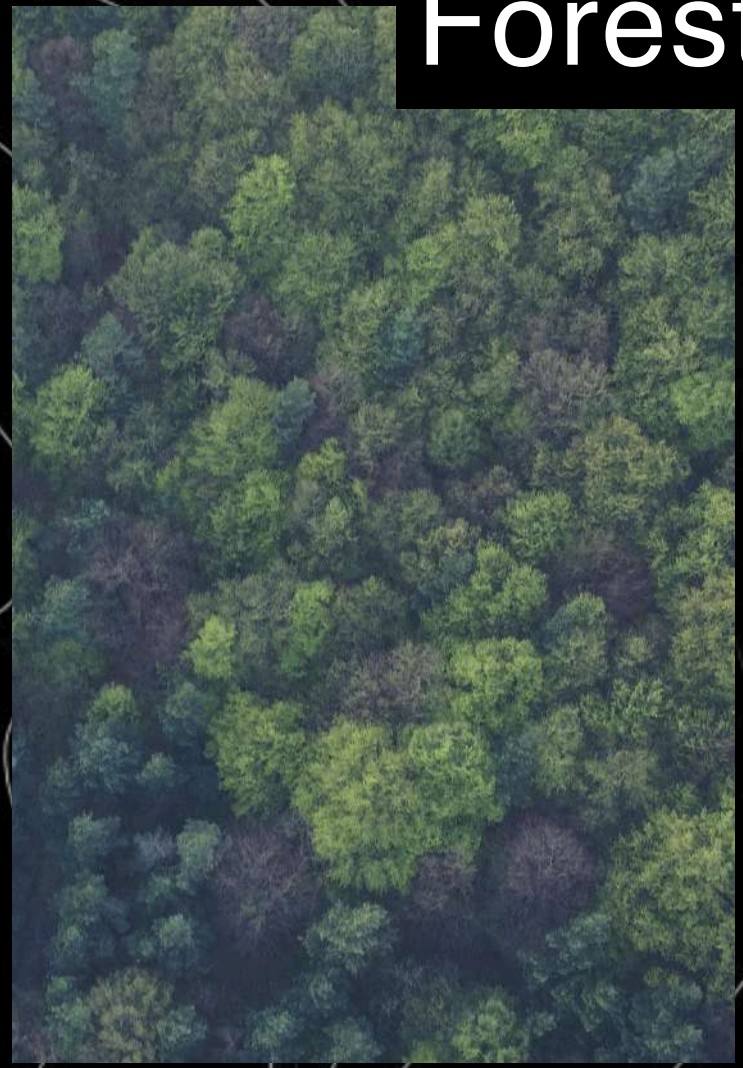
- Wood consumption mainly domestic. The production of wood products is generally much greater than the exports or imports of wood products.
- Progressive erosion of international borders and reduction of transport costs.
- New logics and exchange strategies are setting up: towards a transnational global economy.

International timber trade:

Exchange of timber products between ~~different countries~~ *companies from different countries*.

02 The big picture: the state of forests and current issues

Forests of the world



4.06 billion hectares in 2020 ~ 31% of the world's land area (FAO,2020).

The highest level of biodiversity on land (IPBES,2019).

Many ecosystem services on which human societies rely heavily on:

- **Provision**
- **Regulation**
- Cultural
- Support

Tropical forests

45% of the world's forests are tropical.

Rough characteristics:

- Fast growth
- Highest growing stock per unit area
- Complex ecosystems
- Mostly in developing countries
- Low accessibility

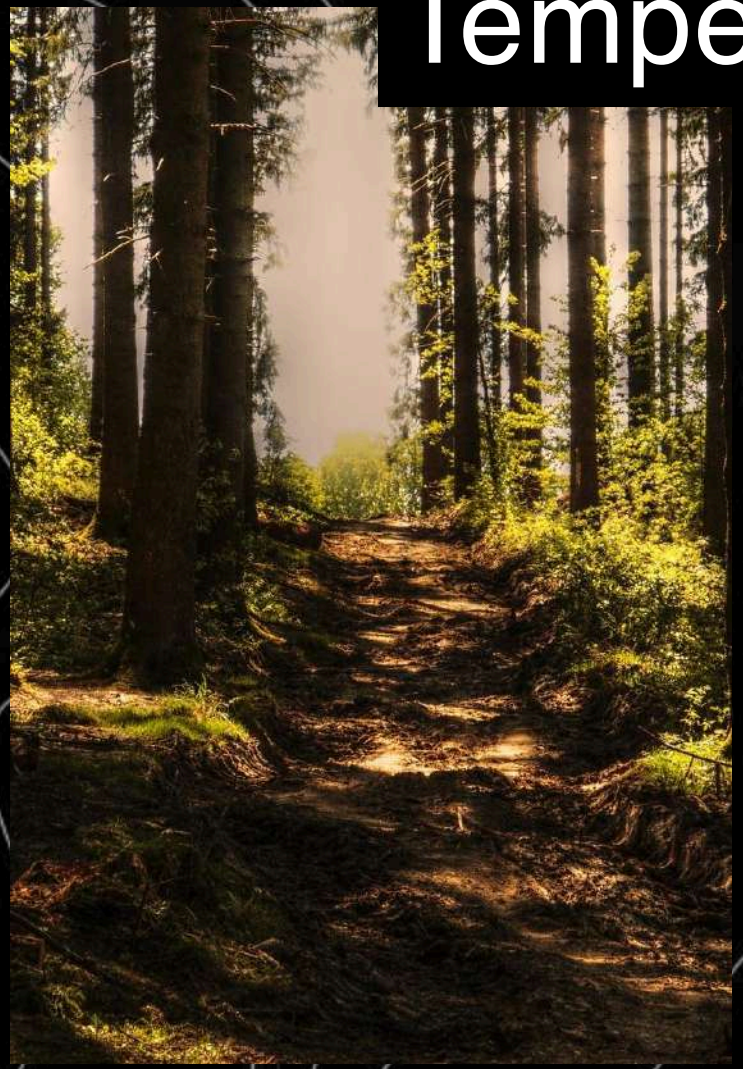
Boreal forests

27% of the world's forests are boreal.

Rough characteristics:

- Slow growth
- Great growing stock per unit area
- Relatively preserved
- In a few countries
- Largely inaccessible

Temperate forests



16% of the world's forests are temperate.

Rough characteristics:

- Medium growth
- Growing stock per unit area
- Managed
- Northern American and European forests are temperate
- Great accessibility

Subtropical forests

11% of the world's forests are subtropical.

Rough characteristics:

- Between tropical and temperate forest.

Uneven distribution

Forests are unevenly distributed between countries: **5 countries possess 54% of global forests.**

1. Russian Fed.: 815 Mha ~ 20%
2. Brazil: 497 Mha ~ 12.2%
3. Canada: 347 Mha ~ 8.5%
4. The USA: 310 Mha ~ 7.6%
5. China: 220 Mha ~ 5.4%

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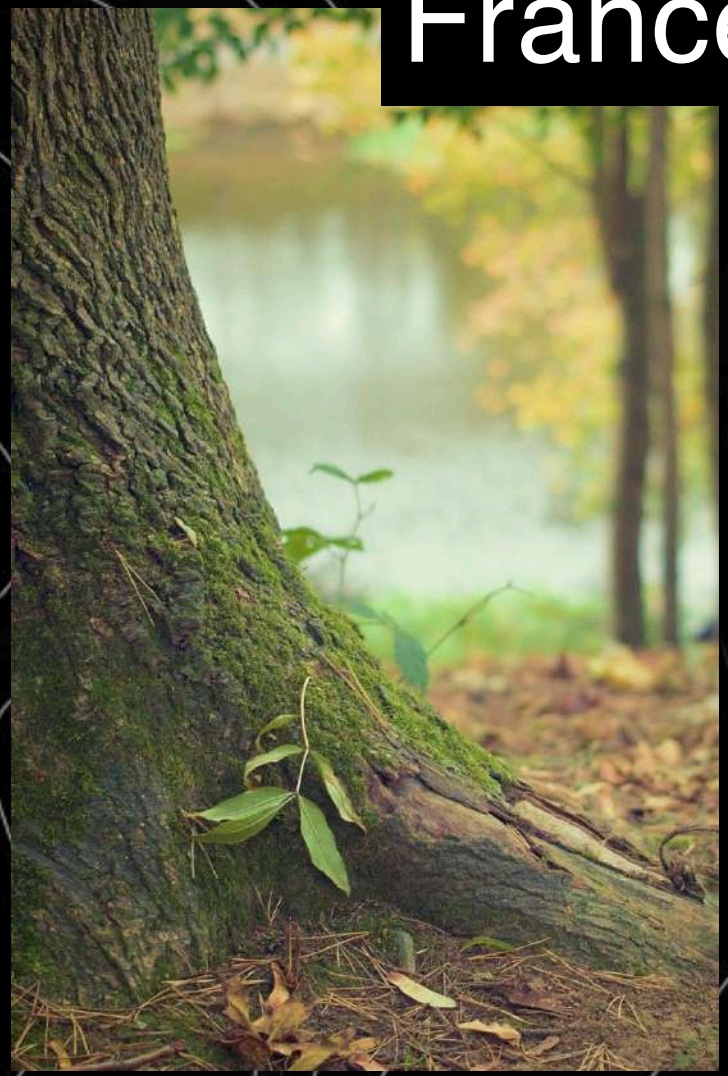
The EU: 160 Mha ~3.9%

France: small player



Metropolitan French forests represent 17.1 Mha ~ 0.4% of the world's forest.

Forest loss

420 million hectare of forest loss Between 1990 and 2020 ~ 10% of the 2020's forest area (FAO, 2020).

The tropics particularly affected (Barlow et al., 2018; FAO, 2020).

Highest global forest area net loss in Africa (average annual rate of net loss increasing).

South America 2nd-highest net loss in forest area (average annual rate of net loss decreasing).

Threats on forests

Global forest area is approximately 68% of its pre-industrial level (IPBES, 2019).

Main causes: deforestation, natural disturbances.

Future wood supply is uncertain.

→ Trade and displacement effect: the forest transition and imported deforestation.

Illegal logging

80 Mm^3 of roundwood illegally harvested in 2013 (Hoare, 2015)~ 0.2% of roundwood production.

Illegal logging mostly happened in **Indonesia (50%), Brazil (25%), and Malaysia (10%)**, but also in Ghana, Cameroon, DRC, Laos, Papua New Guinea and Republic of Congo.

The trade of illegally logged timber has an **estimated value of ~USD51-152 billion annually** (Interpol).

<u>Illegal harvesting ≠ deforestation</u>.

Global wood harvest

~40 billion m^3 harvested in 2022.
+60% in approximately 60 years
(1961-2022)

Wood for (sustainable) development. Increasingly integrated in environmental or energytransition policies.

Mitigating climate change: wood store carbon and act as substitute to GHG-intensive materials.

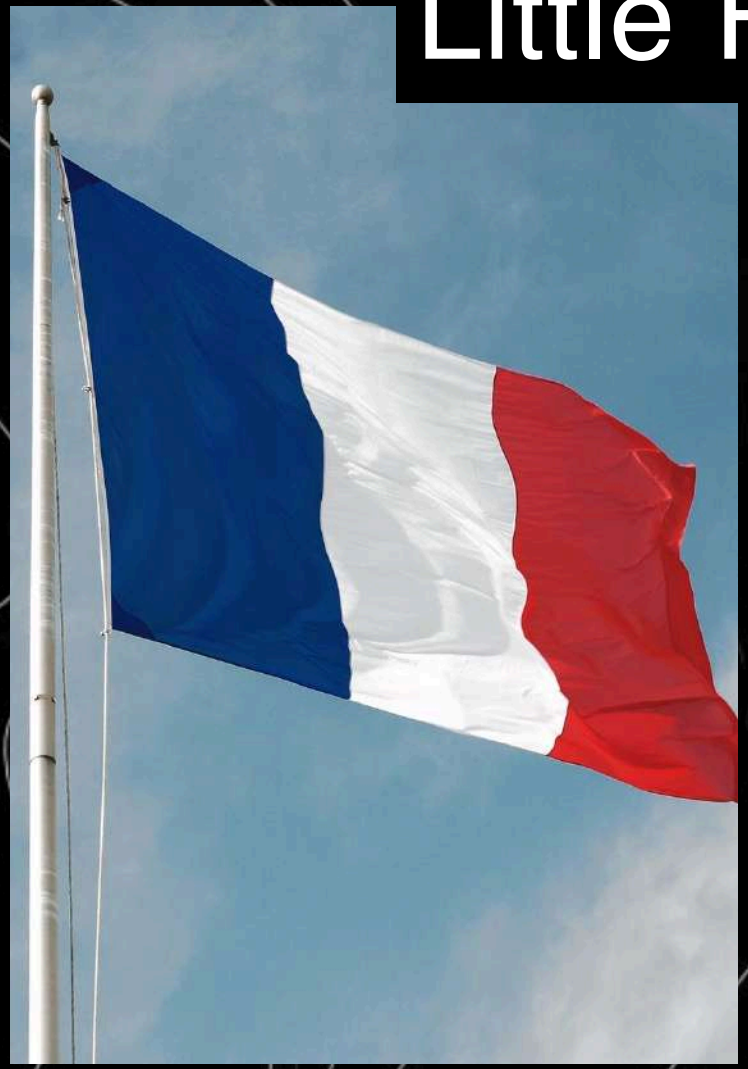
→ **We need wood. Badly.**

The producers

10 countries represent 55% of total roundwood production (2022):

1. The USA: ~459 Mm^3 ~ 11.5%
2. **India: ~348 Mm^3 ~ 8.8%**
3. China: ~317 Mm3 ~ 8%
4. Brazil: ~304 Mm3 ~ 7.6%
5. **Russia: ~197 Mm3 ~ 5%**
6. Canada: 195 Mm3 ~4.9%
7. Indonesia: 124 Mm3 ~ 3%
8. Ethiopia: 120 Mm3 ~ 3%
9. DRC: 2%
10. Nigeria: 2%

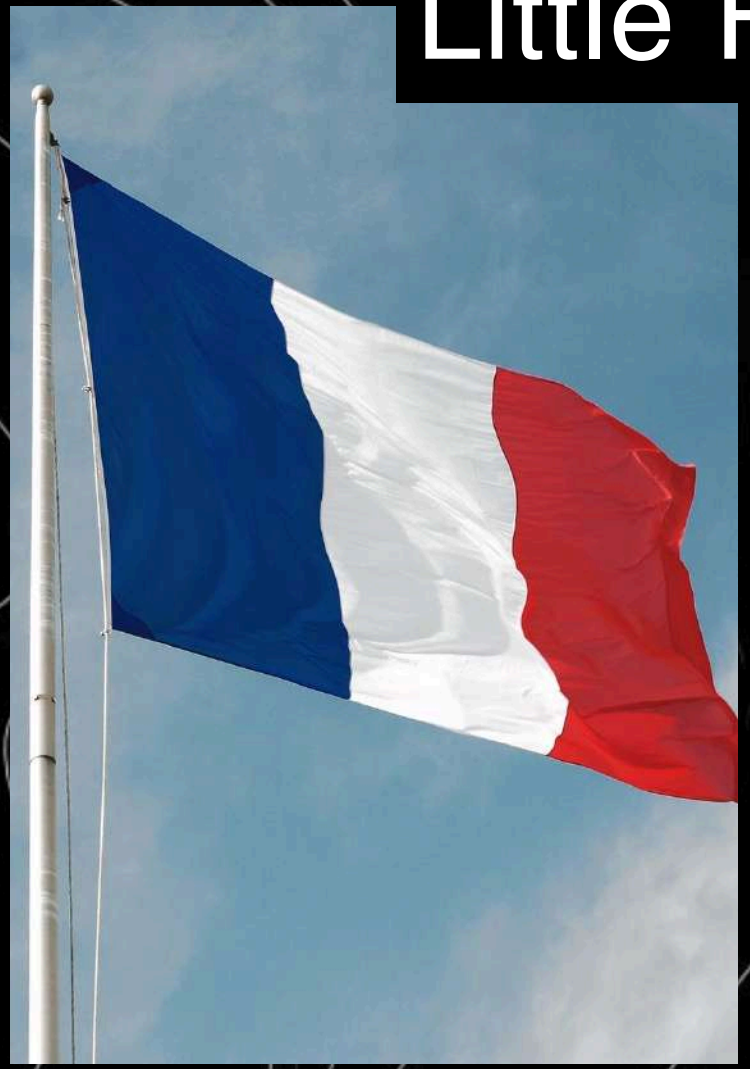
Little France…



France represents 1.3% of the total roundwood production…with 0.4% of the global forest area?

How can such “miracle” happen?

Little France…



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How can such “miracle” happen?

A matter of accessibility.

Materials

Energy

Energy

Biomolecules

The international wood trade is not new, and the uses of wood have changed.

03 International wood trade data: their characteristics, their format, their limits.

What is the most reliable source we can have on trade?

More especially on quantities and values of commodities




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More especially on quantities and values of commodities

Customs are the most reliable source of data concerning tradable commodities.

They collect at least, for every shipment of a given commodity: **the product code, the tonnage, the value, the origin, and the destination** of the merchandise.

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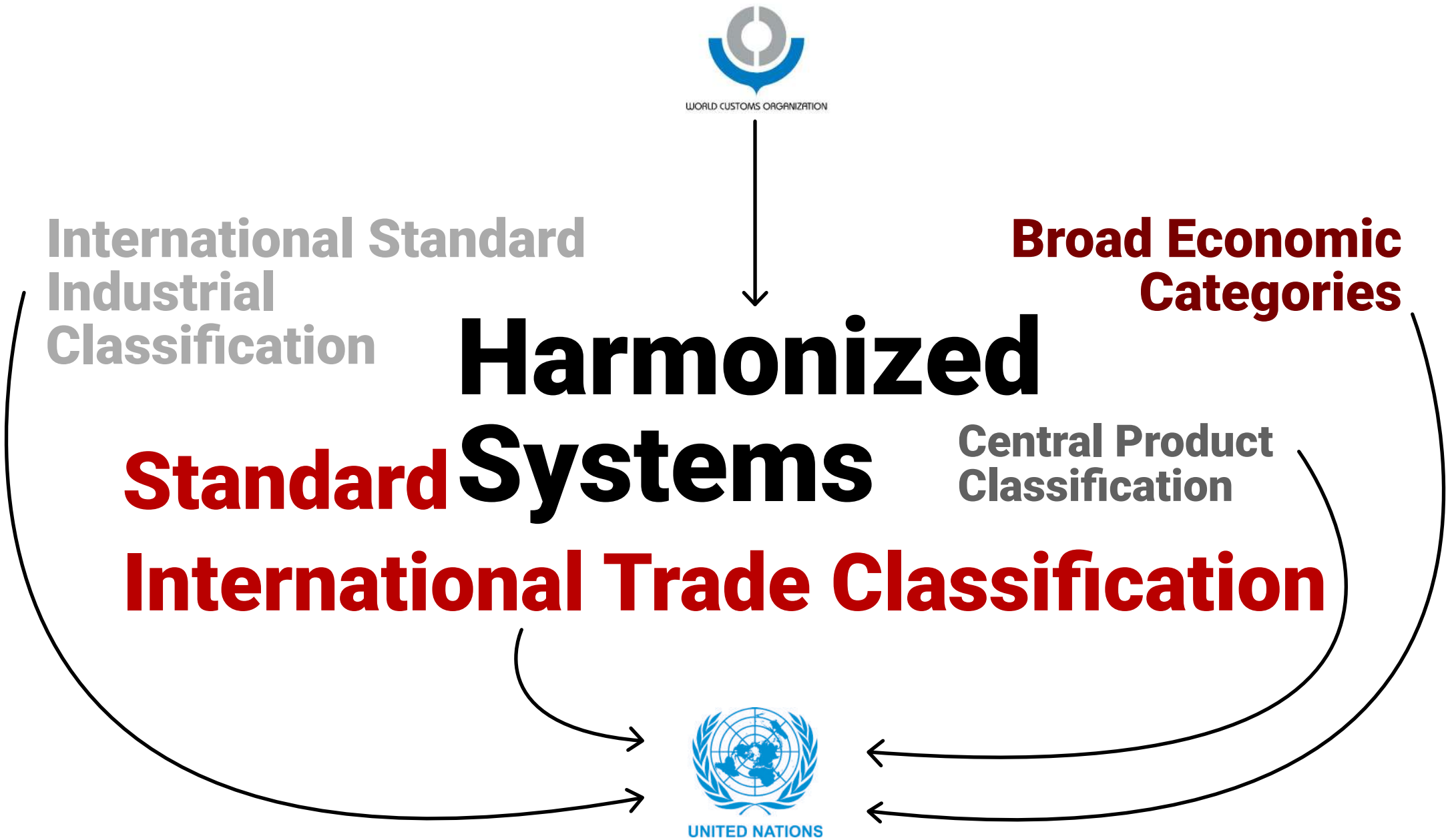
International Standard Industrial Classification
Broad Economic Categories
Harmonized Systems
Central Product Classification
Standard International Trade Classification


WORLD CUSTOMS ORGANIZATION
International Standard Industrial Classification
Broad Economic Categories
Harmonized Systems
Central Product Classification
Standard International Trade Classification
UNITED NATIONS

Harmonized System - WCO

It comprises about 5,000 commodity groups; each identified by a six digit code, arranged in a legal and logical structure and is supported by well-defined rules to achieve uniform classification.

The maintenance of the HS is a WCO priority. This activity includes measures to secure uniform interpretation of the HS and its periodic updating in light of developments in technology and changes in trade patterns.

The system is used by more than 200 countries and economies as a basis for their Customs tariffs and for the collection of international trade statistics. **Over 98 % of the merchandise in international trade is classified in terms of the HS.**

The HS Committee also prepares amendments updating the HS every 5 – 6 years.

World Customs Organization

Example of a wood

- **The first two digits (HS-2) identify the chapter the goods are classified in,** *e.g., 44 = Wood and articles of wood; wood charcoal.*
- **The next two digits (HS-4) identify groupings within that chapter,** *e.g., 44.03 = Wood in the rough, whether or not stripped of bark or sapwood, or roughly squared.*
- **The next two digits (HS-6) are even more specific,** *e.g., 44.03.23 = Other, coniferous - Of fir (Abies spp.) and spruce (Picea spp.), of which the smallest cross-sectional dimension is 15 cm or more*

UNITED NATIONS

Correspondence tables

CPC Correspondence Tables

FROM / TO	CPC prov	CPC Ver. 1.0	CPC Ver. 1.1	CPC Ver. 2	CPC Ver. 2.1
CPC prov	-	✓	✓	-	-
CPC Ver. 1.0	✓	-	✓	-	-
CPC Ver. 1.1	✓	✓	-	✓	-
CPC Ver. 2	-	-	✓	-	✓
CPC Ver. 2.1	-	-	-	✓ ✓	-
ISIC Rev. 3	✓ ✓	✓ ✓	-	-	-
ISIC Rev. 3.1	-	-	✓ ✓	-	-
ISIC Rev. 4	-	-	-	✓ ✓	✓ ✓
BEC Rev. 5	-	-	-	-	✓ ✓
SITC Rev. 4	-	-	-	✓	-
HS1988	✓	-	-	-	-
HS1996	-	✓	-	-	-
HS2002	-	-	✓ ✓	-	-
HS2007	-	-	-	✓	-

NAVIGATION

Classifiactions on economic statistics

- Correspondence Tables
  - CPC
  - HS / SITC / BEC
  - ISIC → UN
  - ISIC → Other

SEARCH

Classification: CPC

Version: Version 2.1

Language: English

Code or Keyword: input a code or keyword

Apply | Reset

Food and Agriculture Organization of the United Nations

Classification of forest products 2022

FORESTRY WORKING PAPER 29 ISSN 2664-1062

Classification of forest products 2022		Corresponding							(an asterisk "*" or "ex" indicate partial link)
CODE	DESCRIPTION	FAO 1982	JQ 2019	HS 2017	HS 2022	SITC 4	BEC 5	CPC 2.1	ISIC 4
012.	Wood in the rough other than wood fuel	111	1.2	4403.21	4403.21	247.4	2111	0311	0210
		121	1.2.C	4403.22	4403.22	247.5	1111	0312	0220
			1.2.NC	4403.23	4403.23	247.9		0313*	
			1.2.NC.T	4403.24	4403.24	245.01*			
				4403.25	4403.25				
				4403.26	4403.26				
				4403.41	4403.41				
				4403.49	4403.42				
				4403.91	4403.49				
				4403.93	4403.91				
				4403.94	4403.93				
				4403.95	4403.94				
				4403.96	4403.95				
				4403.97	4403.96				
				4403.98	4403.97				
				4403.99	4403.98				
				4401.11*	4403.99				
				4401.12*	4401.11*				
					4401.12*				
012.1	Wood in the rough from the main stem and branches	n.a.	1.2	4403.21*	4403.21*	247.4*	1111	0311*	0210
			1.2.C	4403.22*	4403.22*	247.5*		0312*	0220
			1.2.NC	4403.23*	4403.23*	247.9*			
			1.2.NC.T	4403.24*	4403.24*				
				4403.25*	4403.25*				

Summary about classifications

Why does it matter?

Comparing or combining two databases becomes quite difficult when they use different products classifications. To make them comparable, **you have to check the correspondence tables between the different classifications**.

Why classifying?

Classifications provide a **common language in trade** by offering a clear decomposition and definition of all tradable goods at different levels of aggregation, for different purposes. **Their role is crucial in collecting data on international trade.**

Precautions

Amendments allow commercial classifications to include new merchandises and to adapt to market changes, making **the common language evolves through time**. This may lead to some **continuity issues** that classifications must address.

What is the most reliable source we can have on trade?

More especially on quantities and values of commodities

Customs are the most reliable source of data concerning tradable commodities.

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TRADE VALUE UNITS: FOB VS CIF

Trade value is in *current* US dollars

Free-on-board valuation (FOB) is used for exports

Cost, insurance, and freight (CIF) valuation is used for imports

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PARTNER COUNTRY FOR IMPORTS

- *Country of purchase*: the country where the seller of the goods resides.
- *Country of consignment*: the last intermediate country from which goods were dispatched to the importing country.
- *Country of shipment*: the country from which goods are shipped.

PARTNER COUNTRY FOR IMPORTS

Country of origin: 2 rules of origin

(a) Rule of goods “wholly produced” in a given country;

(b) Rule of “substantial transformation”, where two or more countries have taken part in the production of the goods.

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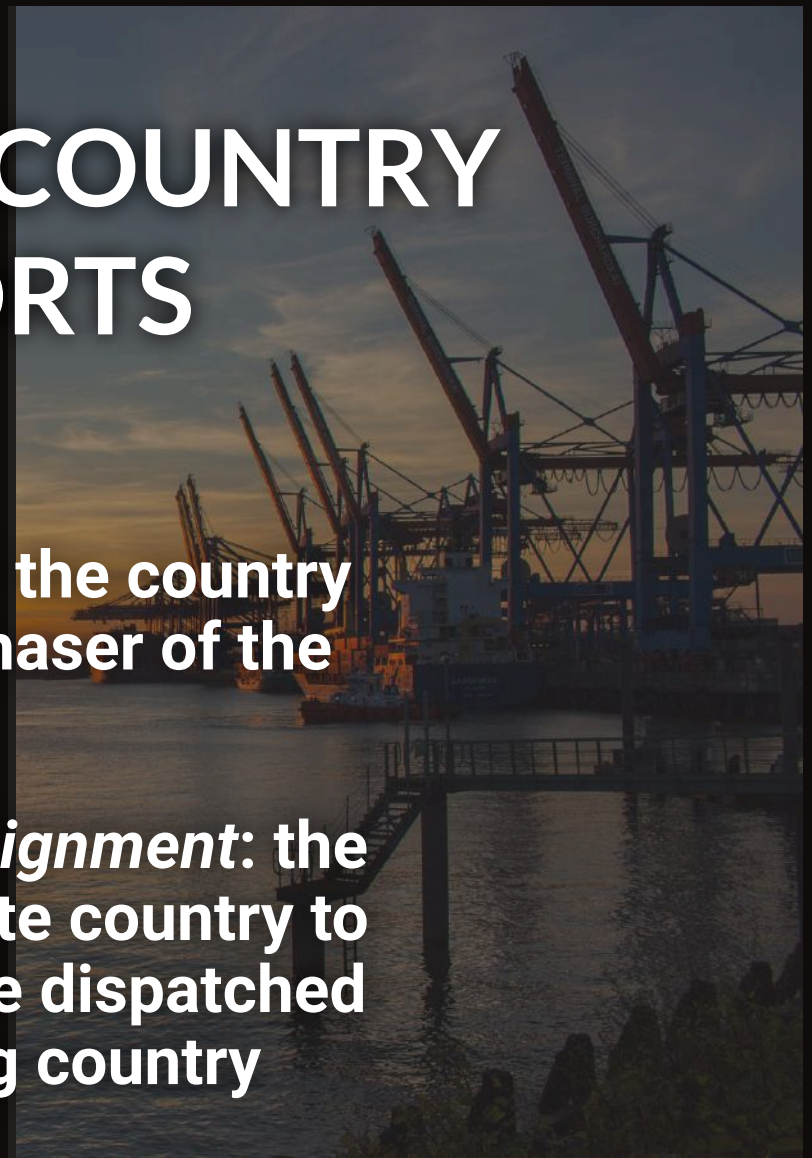
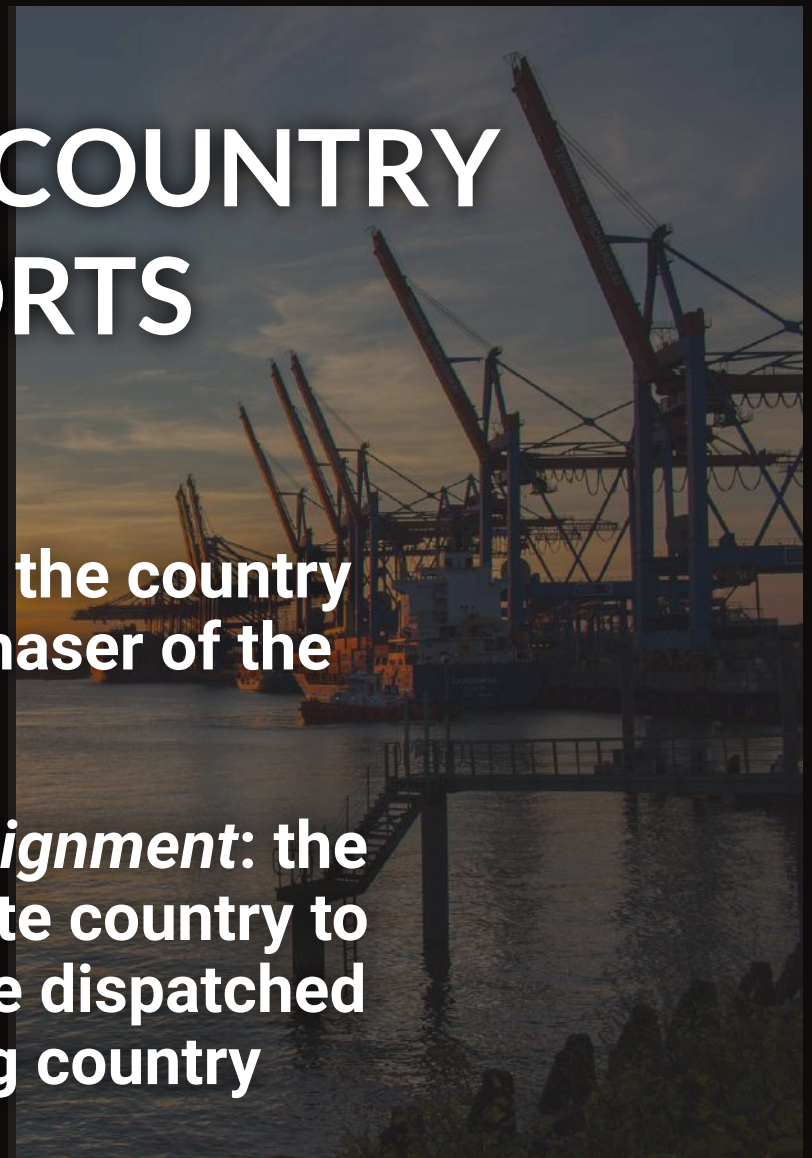
PARTNER COUNTRY FOR EXPORTS



- *Country of sale*: the country where the purchaser of the goods resides
- *Country of consignment*: the first intermediate country to which goods are dispatched by the exporting country
- *Country of shipment*: the country to which goods are shipped
- *Country of last known destination*: the last country to which goods are to be delivered
- *Country of consumption*: the country in which the goods are expected to be used

PARTNER COUNTRY FOR EXPORTS



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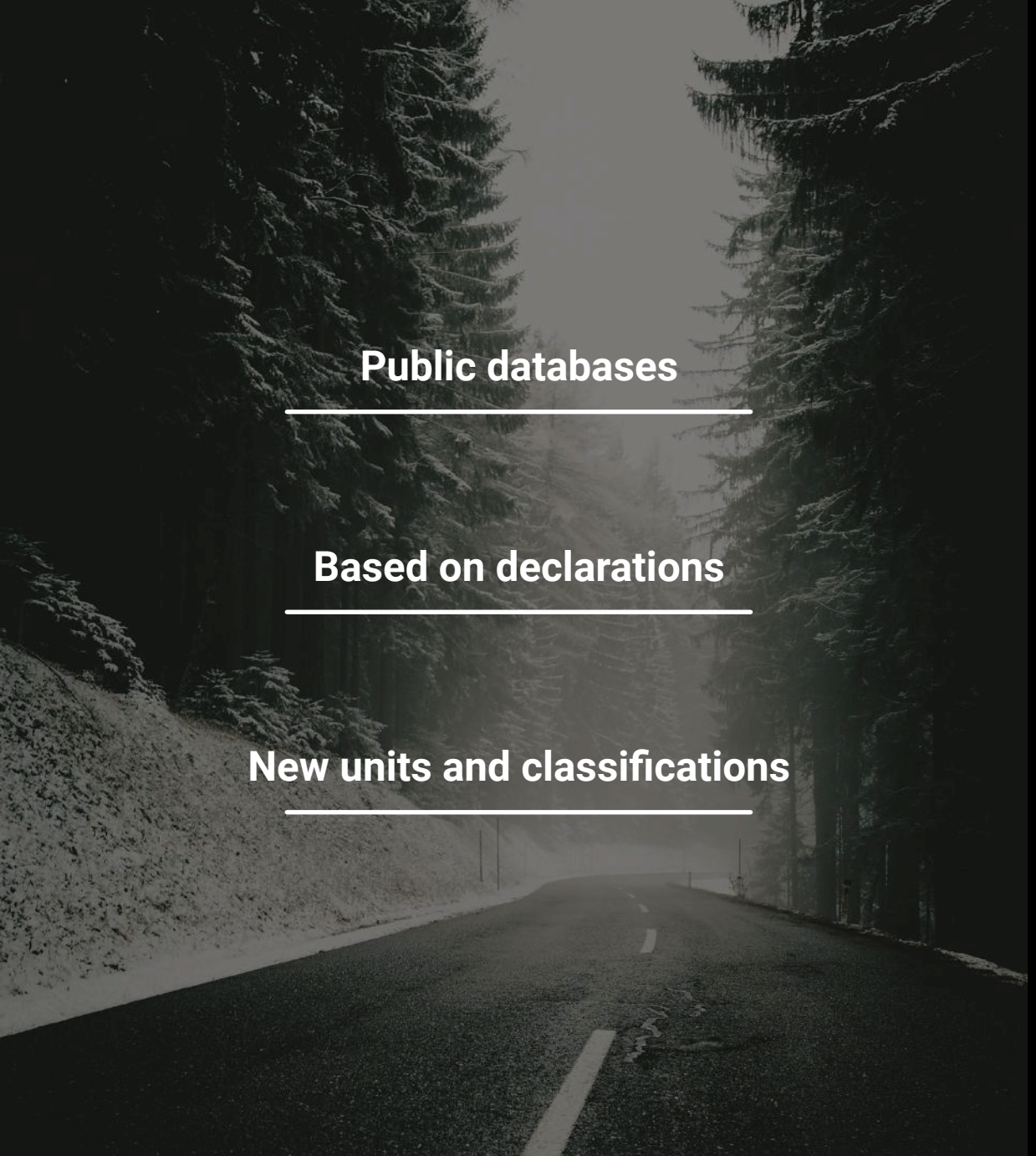
WOOD PRODUCTS TRACEABILITY IS IMPERFECT

We know little about the journey of a tradable wood product

Bonus: Some countries play the role of commercial platform, blurring the trace of wood products.



Public databases

Based on declarations

New units and classifications

INTERNATIONAL TRADE DATABASES

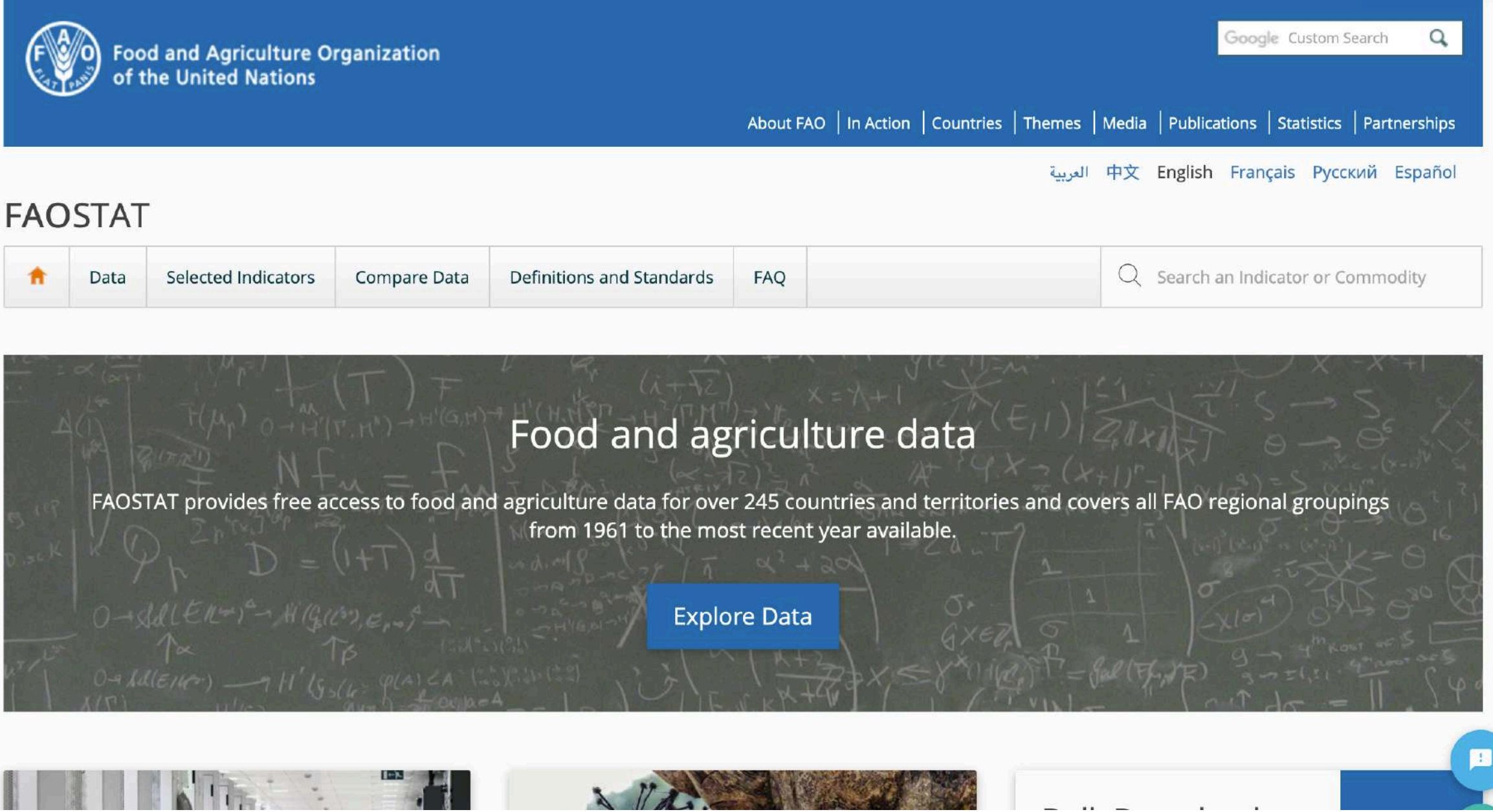
UN Comtrade and FAOSTAT databases

These are open databases.

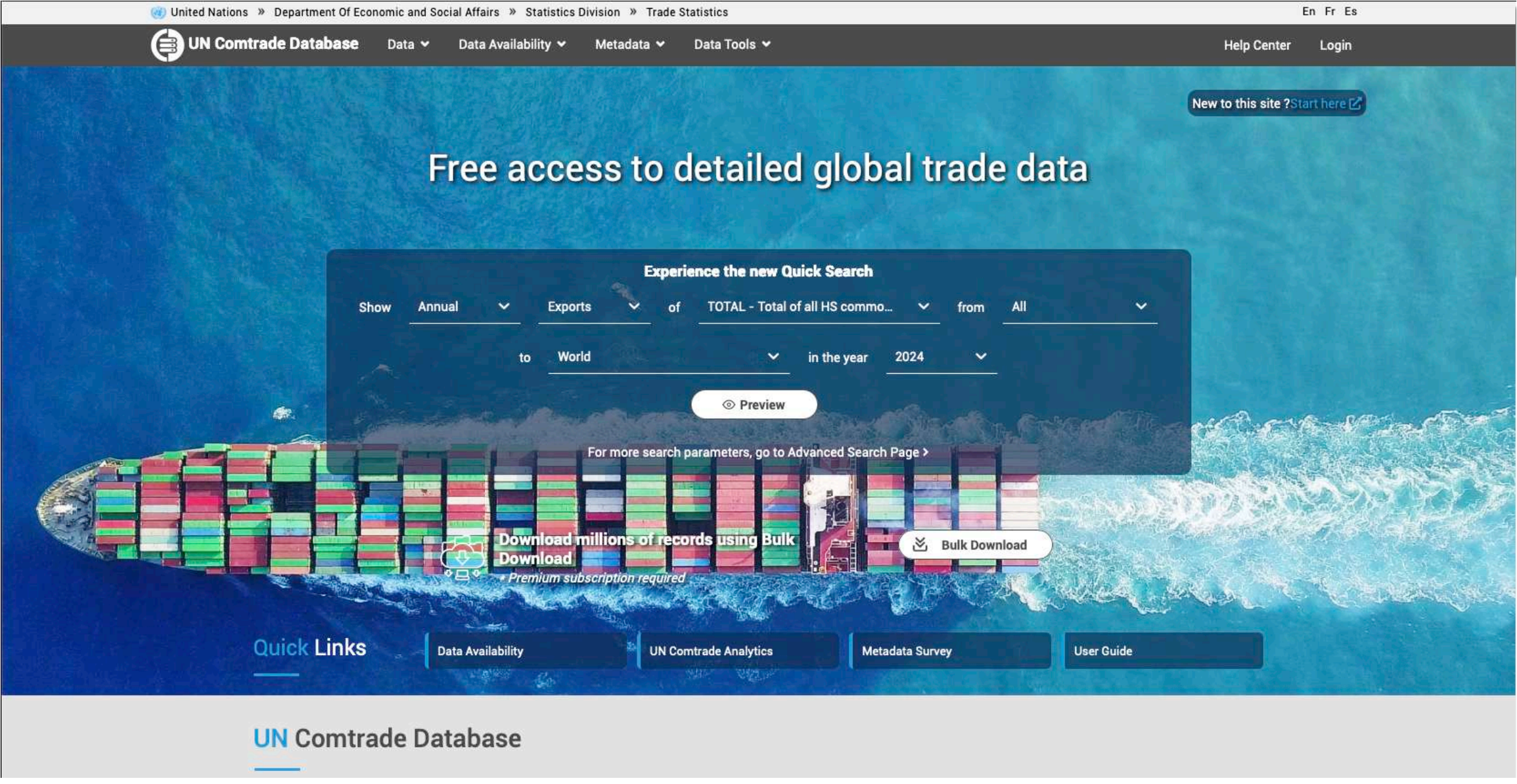
They collect reports from all member countries through the Joint Forest Sector Questionnaire (JFSQ).

Each country has a national correspondent in charge of providing the data for the JFSQ.

The data must have certain units and follow a given classification (may require data conversion).



FAOSTAT website homepage



UN Comtrade database website

Lessons from UN and FAO's databases

Conversion

Data collected by the FAO through the JFSQ has to be **converted in new units using** national or international conversion coefficients. (Ex. Of roundwood: French volume is over bark, FAO's volume is under bark!)

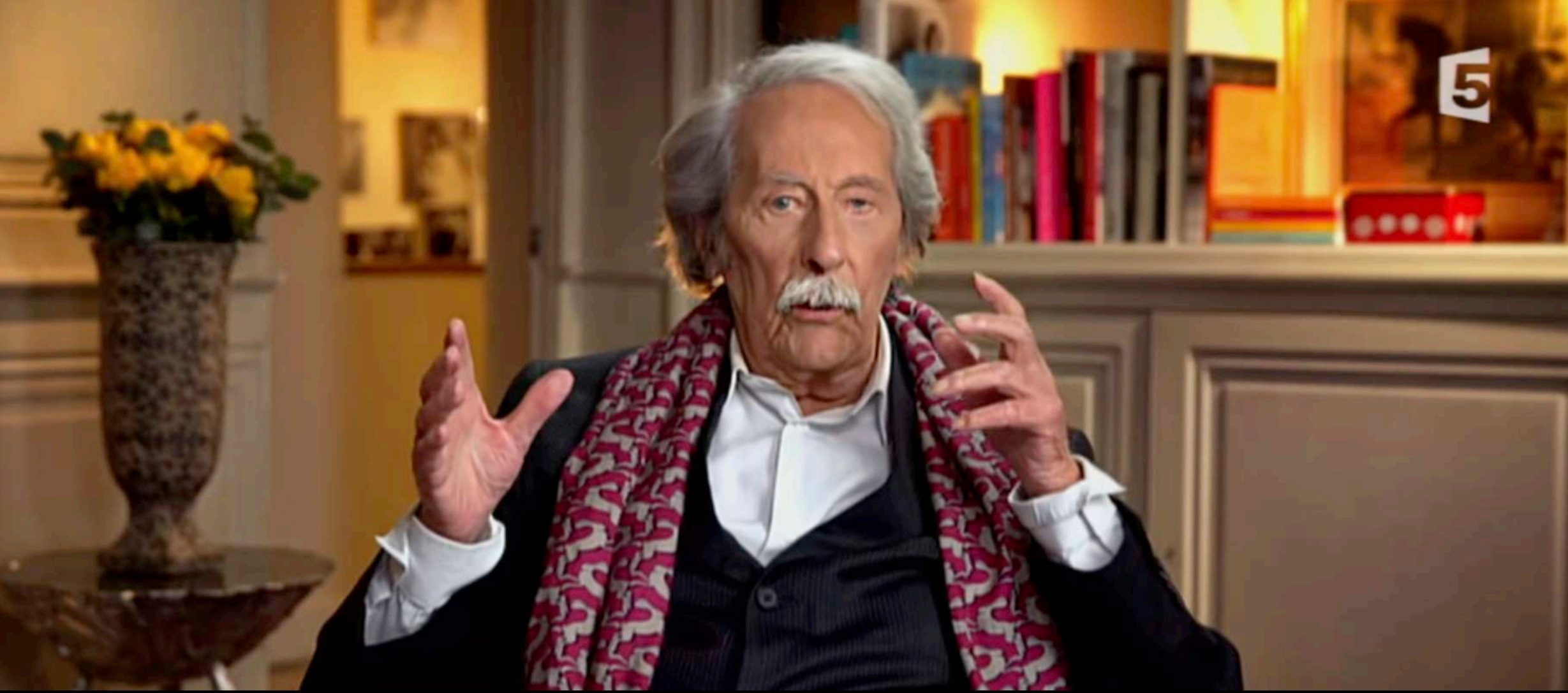
Public database

UN Comtrade and FAO's database are **open** and **use their own classifications and set of units**.

They are the two more widely used databases for international wood products trade.

Declared values

Data from UN Comtrade and FAO's databases are **reported by the member countries**... that provide a financial support for the two organizations. **No audit would be performed on the quality of the reporting.**



“Mais la fourmi se tripote les funicules...”

Jean Rochefort, Les boloss des belles lettres, *Les Fables de La Fontaine*

- Some databases are based on declared values that may be incorrect.
- When using a database, you should take care of the units used and consider with precaution values in other units that results from conversion.
- Bonus: One tricky point of using international trade data is the management of null values.

What may be the limitations of those databases?

Or why should we be careful while making the data speak?

- Correspondence between different classifications used by different databases may be challenging to deal with.
- Traceability is not guaranteed.
- Amendments that aim to add corrections to classifications or a new data collect may, lead to some breaks in statistical series.
- Some measures contain uncertainties that are sometimes high and may misrepresent reality.

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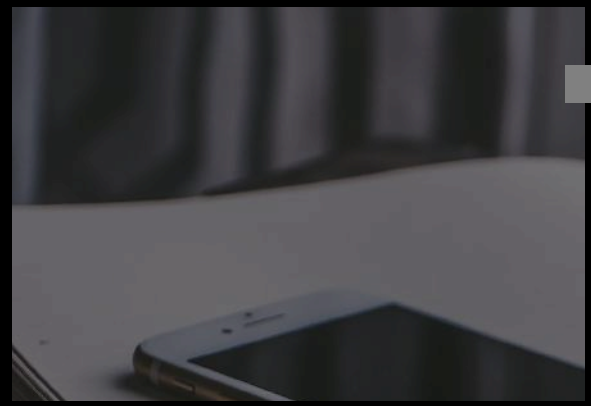
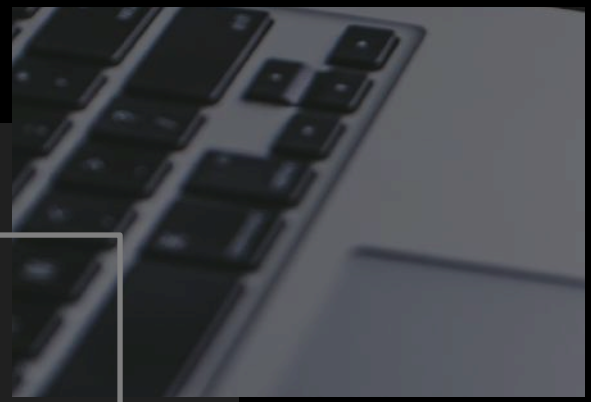


What may be the limitations of those databases?

Be cautious when using trade data.



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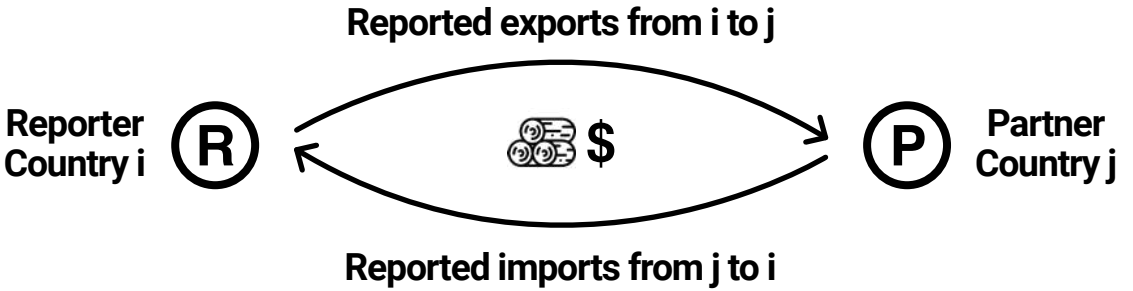
04 Structure and recent dynamics of the international trade of roundwood.

DATA USED

We collect ***export and import data*** from the ***UN Comtrade database*** from ***1996 to 2023*** corresponding to ***FAO product 012 “Wood in the rough other than wood fuel”***.

FROM TRADE DATA TO TRADE NETWORKS

Bilateral trade data



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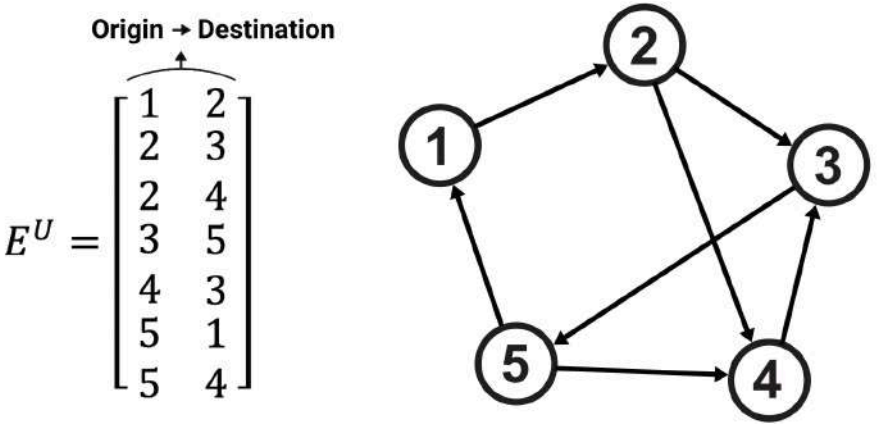

Unweighted and directed Networks

FROM TRADE DATA TO TRADE NETWORKS

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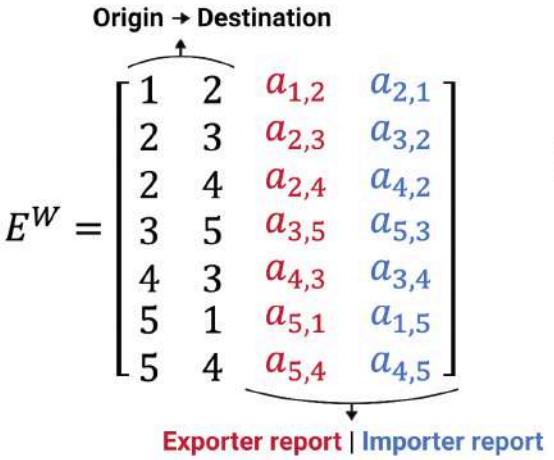

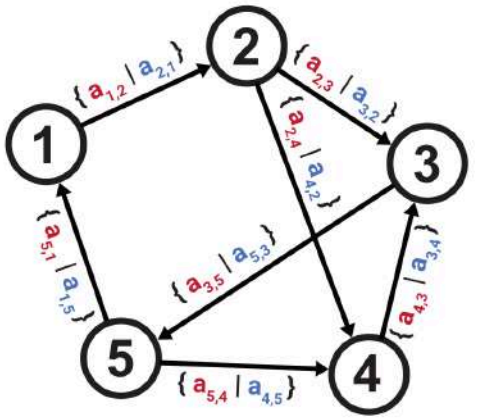

Weighted and directed Networks

World exports of more of $500 billion or more of industrial roundwood in 2016

“Mais tout ce bordel dans un brouillard de chicha, on voit que dalle m** ! Olivier de Carglass, fait ton taffe non ???”**

Jean Rochefort, Les boloss des belles lettres, *Docteur Jekyll et Mr Hyde*

METRICS TO ASSESS NETWORK STRUCTURE

NETWORK COMPOSITION

Number of nodes: Nb. of countries involved in trade

Number of pure exporters: Nb. of countries that only export roundwood

Number of pure importers: Nb. of countries that only import roundwood

Number of mixed countries: Nb. of countries that both export and import roundwood

Country profiles: Trade behaviour of countries in relation to exports and imports

NETWORK CONNECTIVITY

Mean number of connections per node: Average nb. of trading partners per country; indicator of the overall connectedness.

Variance in the number of connections per node: Variation in the nb. of trading partners.

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Trade network composition

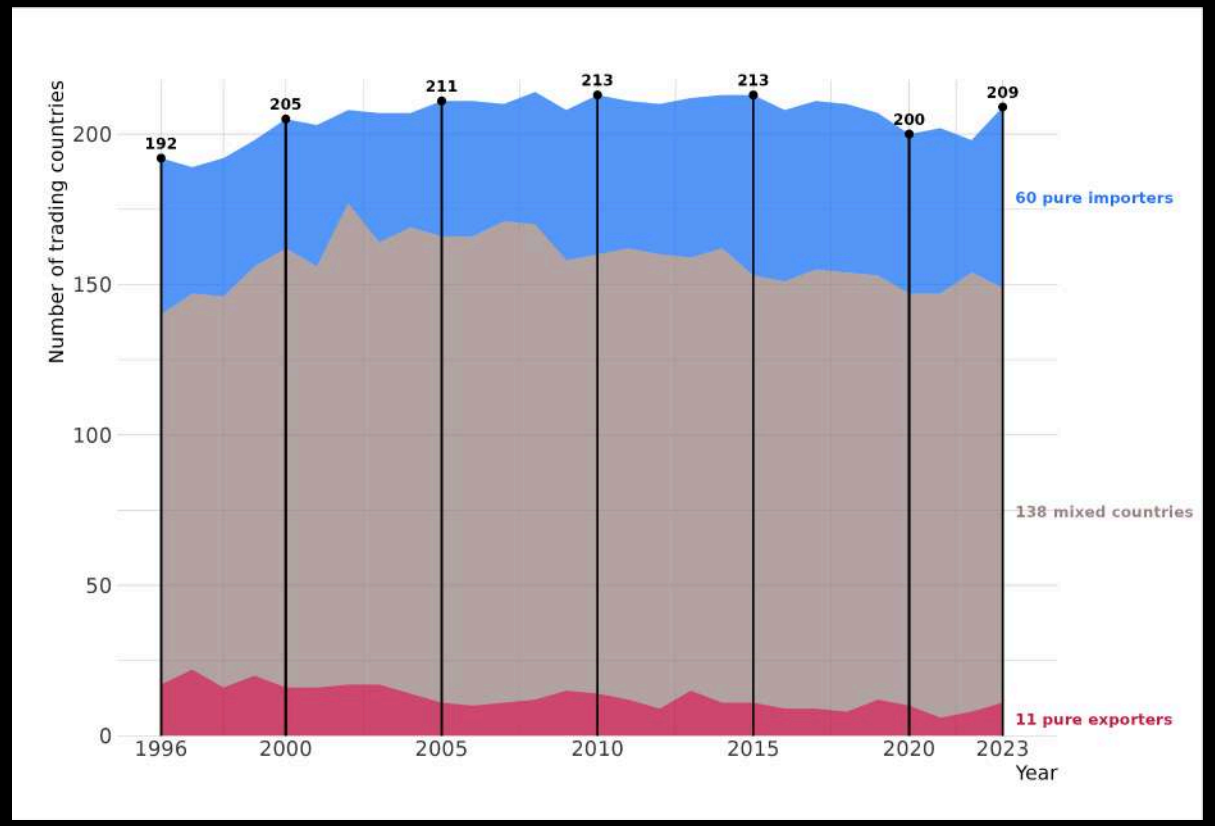
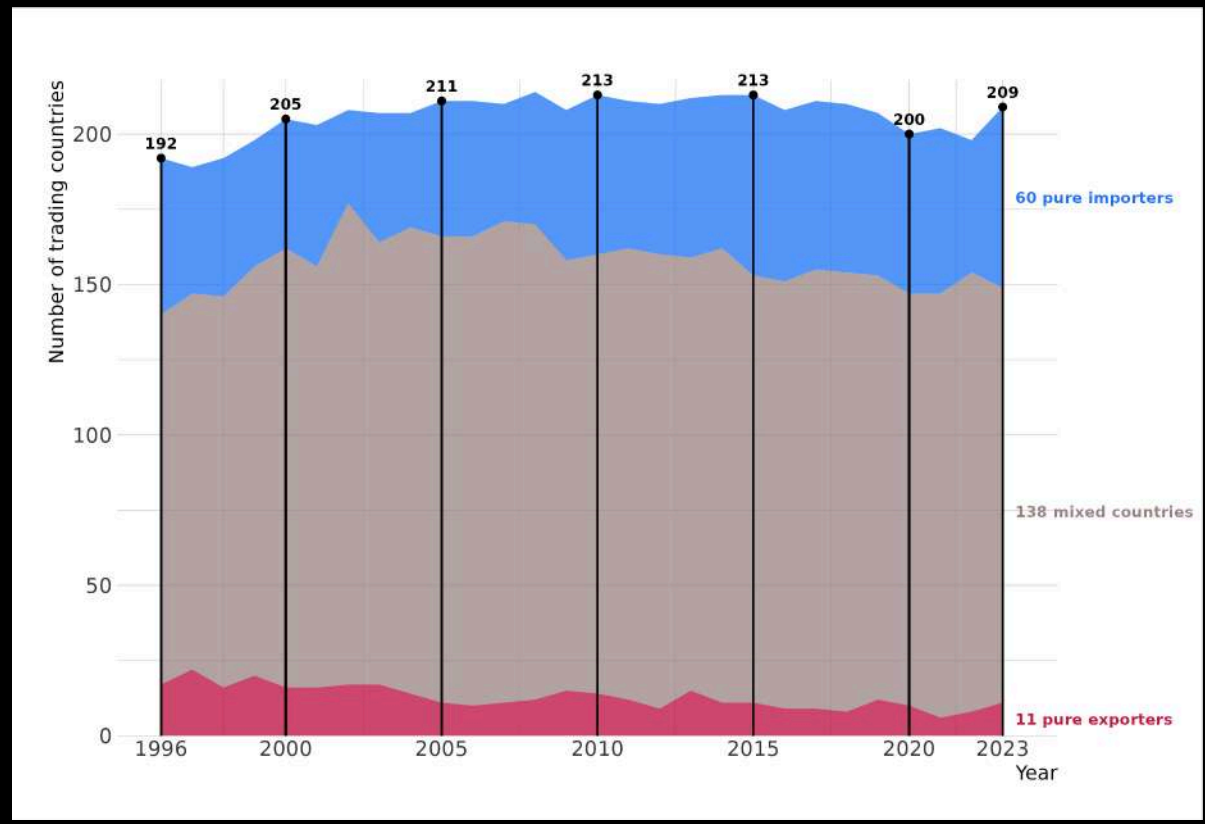


Figure. Number of trading countries in total and per group: pure exporters (red), pure importers (blue), mixed countries (grey); for each year of trade.

Trade network composition

The number of countries involved in the roundwood trade fluctuated slightly.

- **Min: 189**
- **Max: 214**
- **Mean: 206**



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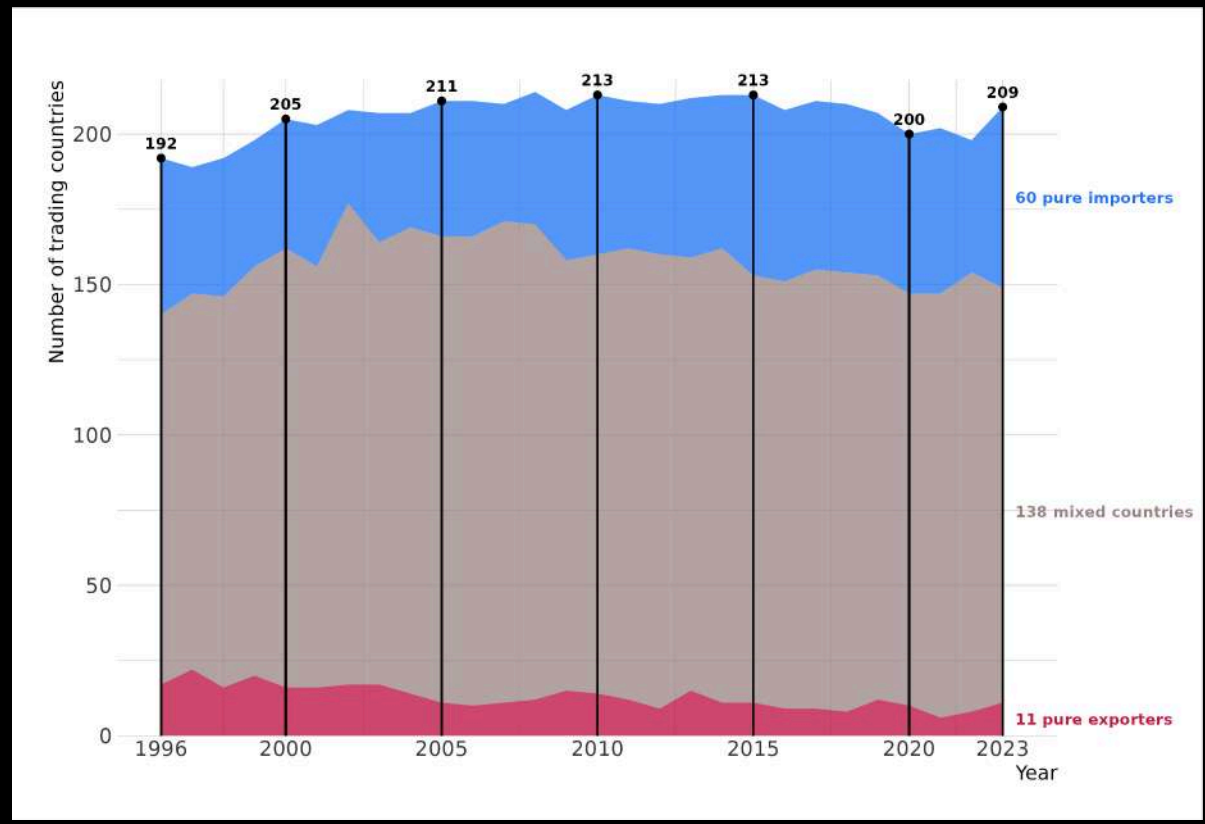
- **⬇ from 17 to 11**
- **2023 ~ 5.3% of traders**

Nb. of pure importers:
- **1996-2007: ⬇ from 52 to 39**
- **2007-2023: ⬆ to 60**
- **2023 ~ 28.7% of traders**



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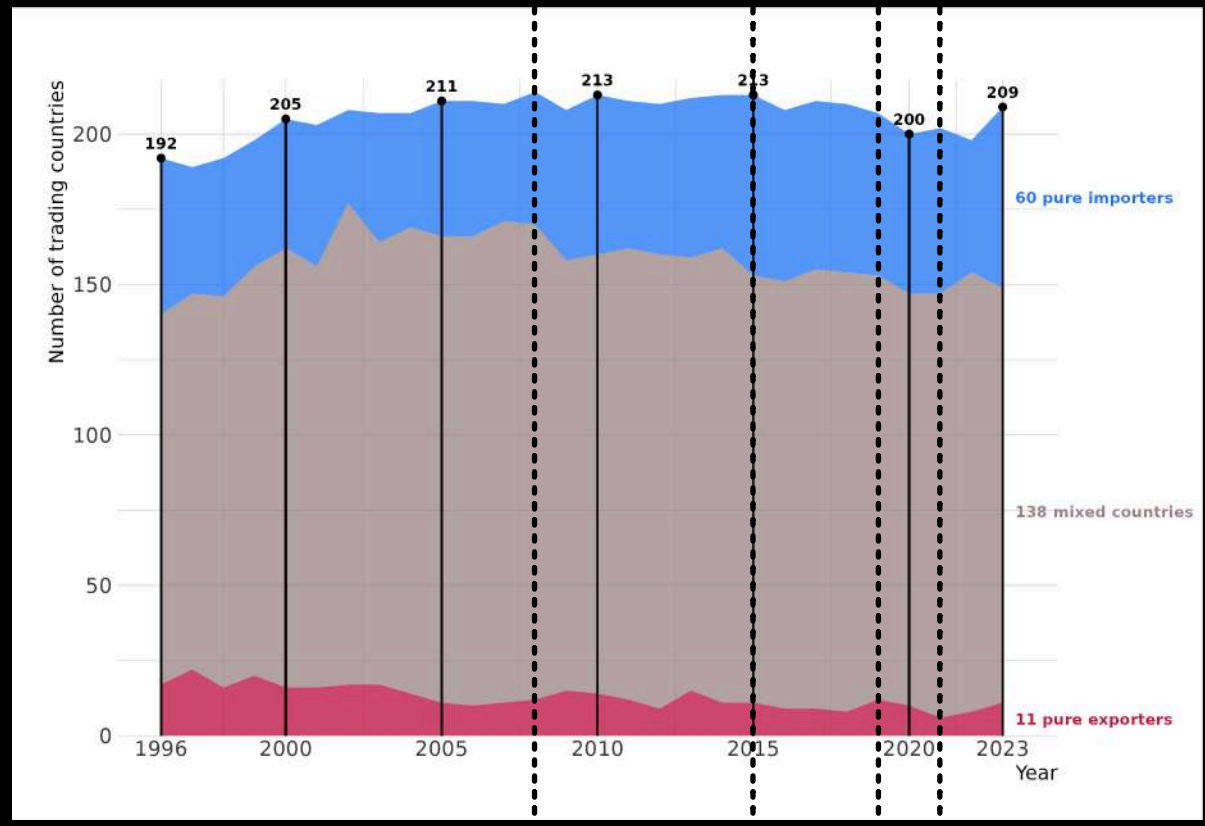
2023: 66% of the traders are mixed countries
- Openness to trade

Short terms drops in the number of pure exporters, pure importers, and mixed countries



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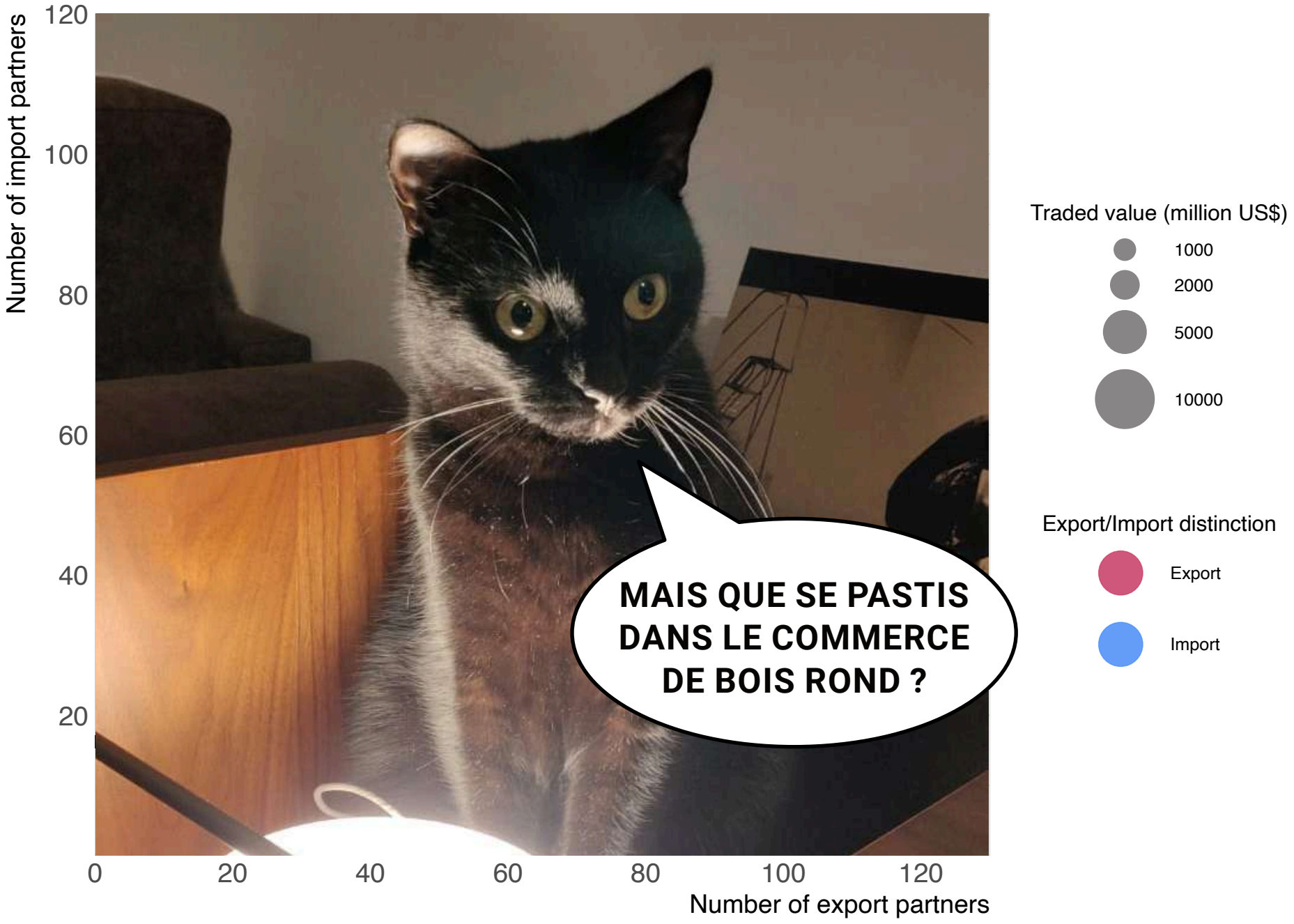
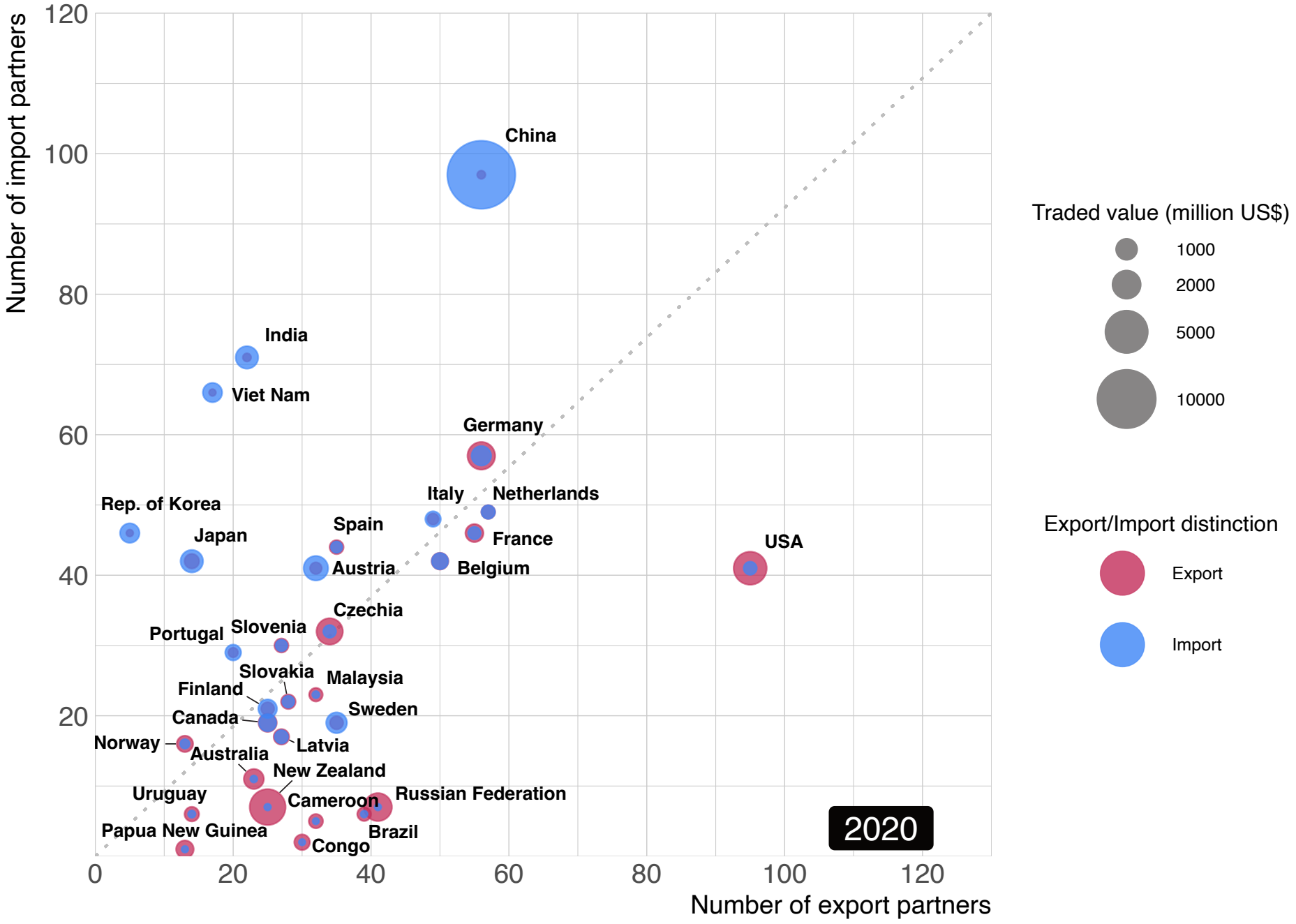
Herfindahl-Hirschman index:

Countries that contributed to at least 1% of the total export or import value in 2020 = 31 countries ~ 15.5% of all trading countries


Number of import partners
120
100
80
60
40
20
0
20
40
60
80
100
120
Number of export partners
MAIS QUE SE PASTIS DANS LE COMMERCE DE BOIS ROND ?
Traded value (million US$)
1000
2000
5000
10000
Export/Import distinction
Export
Import


Number of import partners
120
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60
80
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120
Number of export partners
China
India
Viet Nam
Germany
Rep. of Korea
Japan
Italy
Netherlands
Spain
France
Austria
Belgium
USA
Czechia
Portugal
Slovenia
Slovakia
Malaysia
Finland
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Canada
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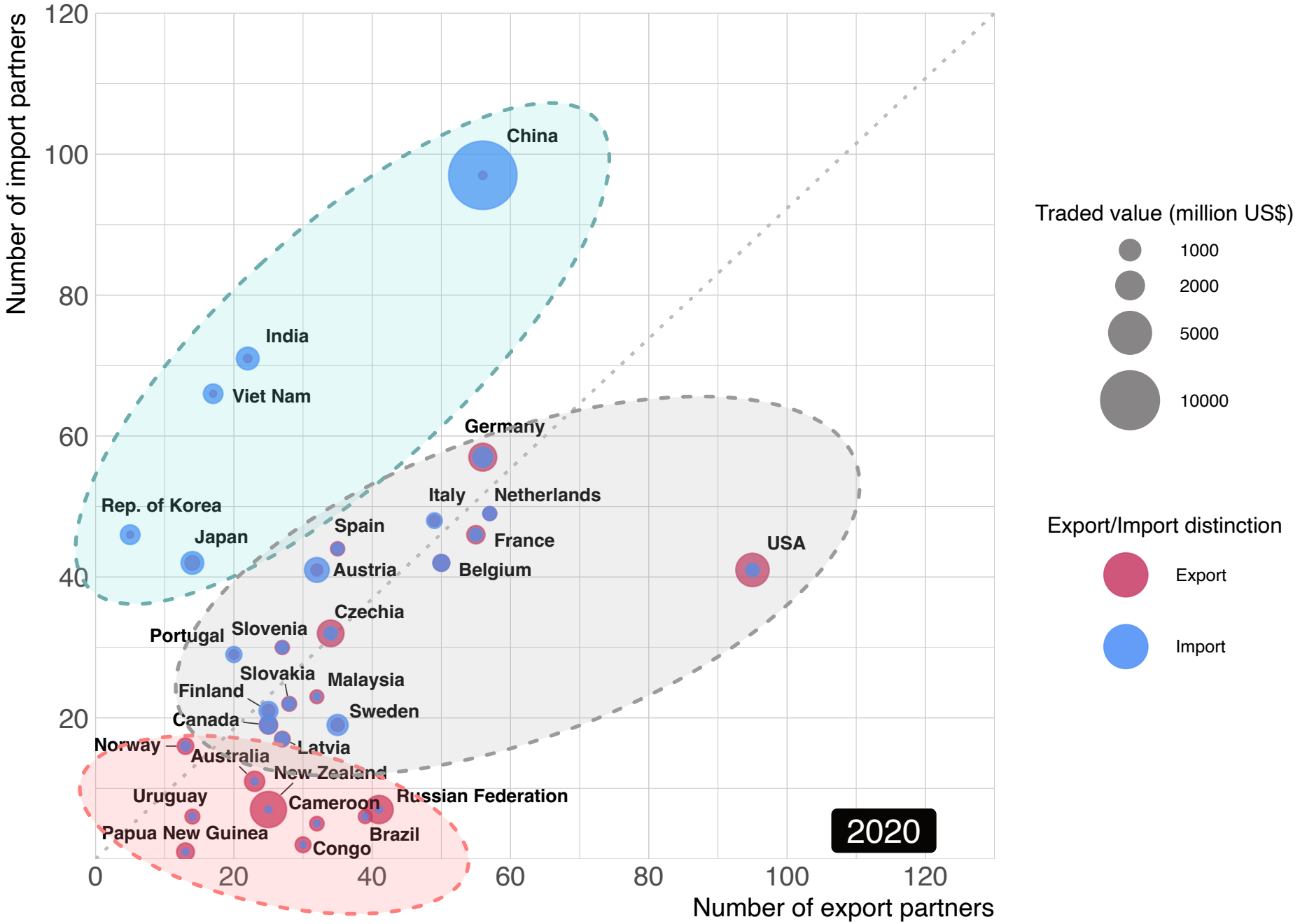
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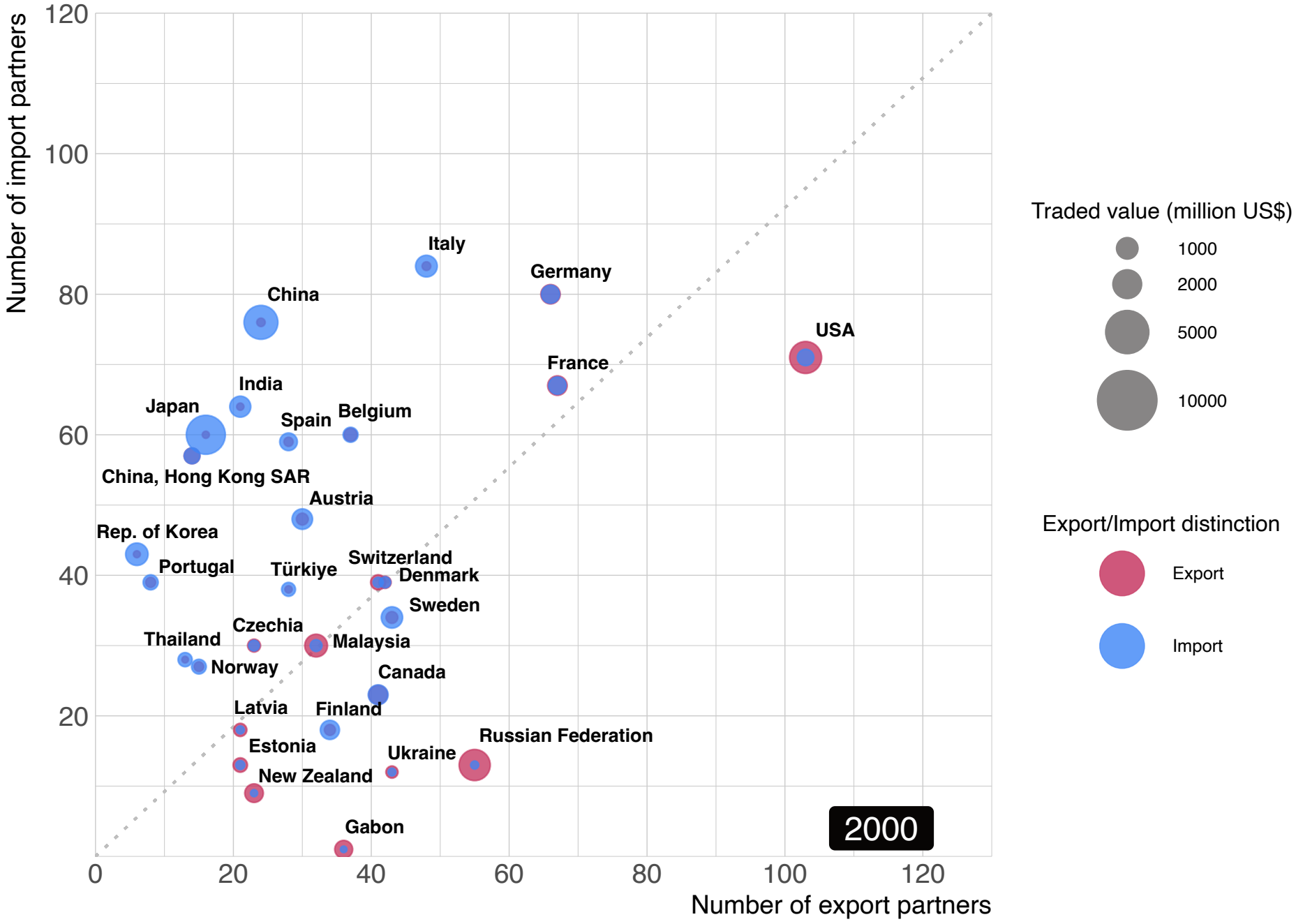
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USA
France
India
Japan
Spain
Belgium
China, Hong Kong SAR
Austria
Rep. of Korea
Portugal
Türkiye
Switzerland
Denmark
Sweden
Czechia
Thailand
Malaysia
Norway
Canada
Latvia
Finland
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Estonia
Ukraine
New Zealand
Gabon
2000
Traded value (million US$)
1000
2000
5000
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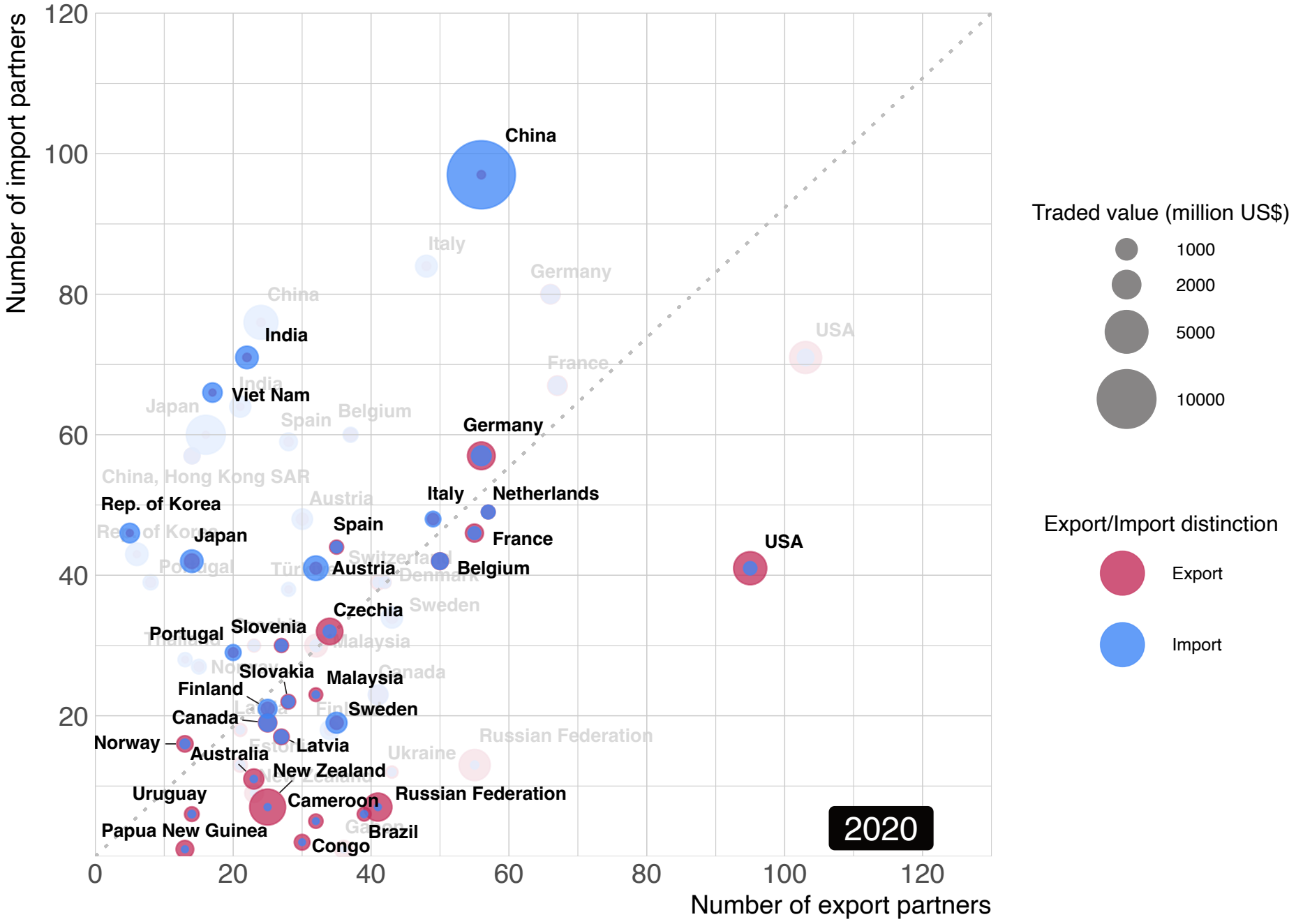
Export/Import distinction
Export
Import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China
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NETWORK CONNECTIVITY

- Increase in the mean connectivity during the first half of the study period before decreasing
- Exporters were, on average, 23% more connected than importers
- Short-term increases and decreases in mean connectivity were observed from year to year, with some shared by both exporters and importers

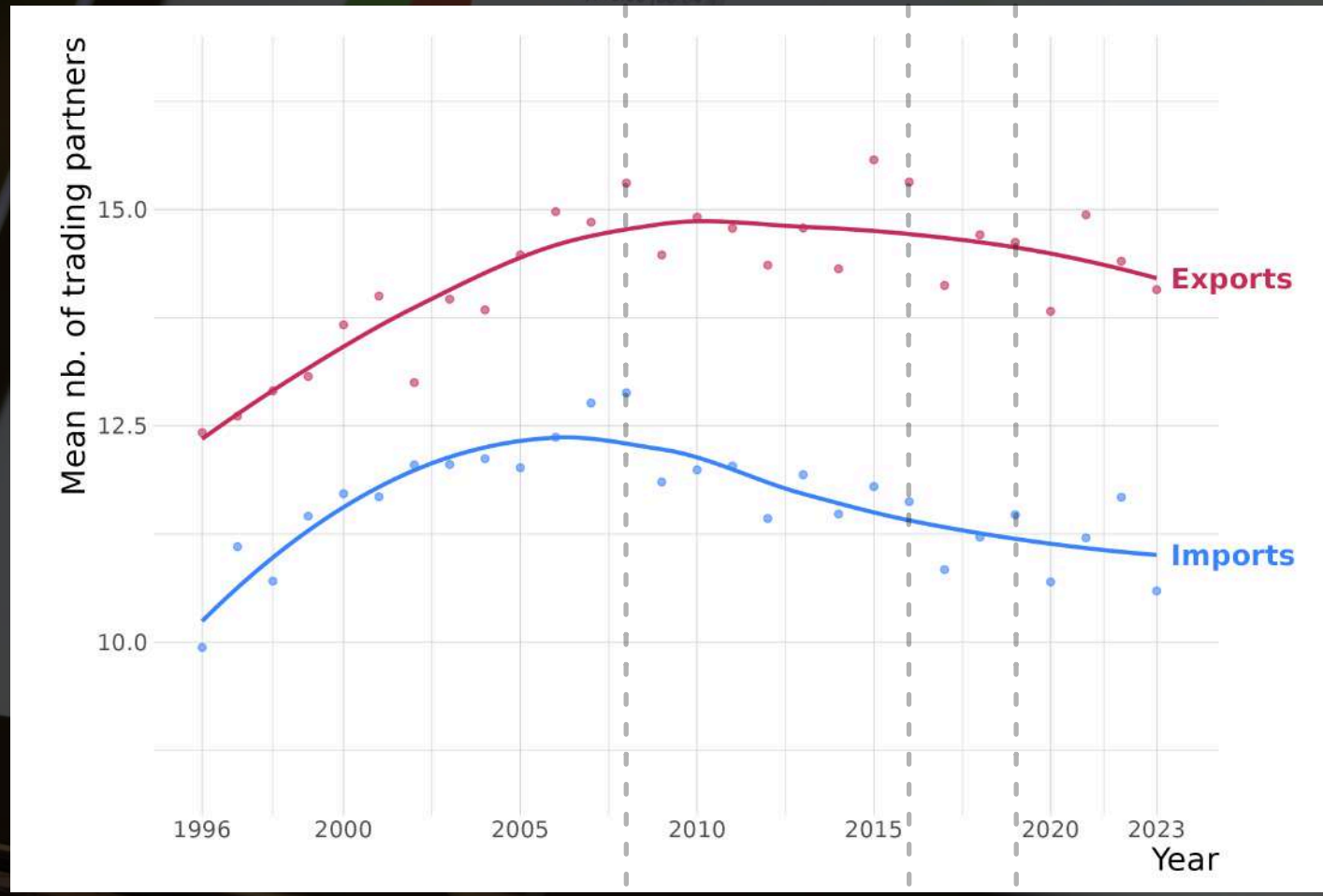


Figure. Mean number of connections per node. Means for exports are in red, means for imports are in blue.

NETWORK CONNECTIVITY

- High variance in connectivity for exporters and importers
- Exporters and importers comprise countries with a significantly lower number of connections than average, and others with a significantly higher number of connections than average
- Still short-term increases and decreases

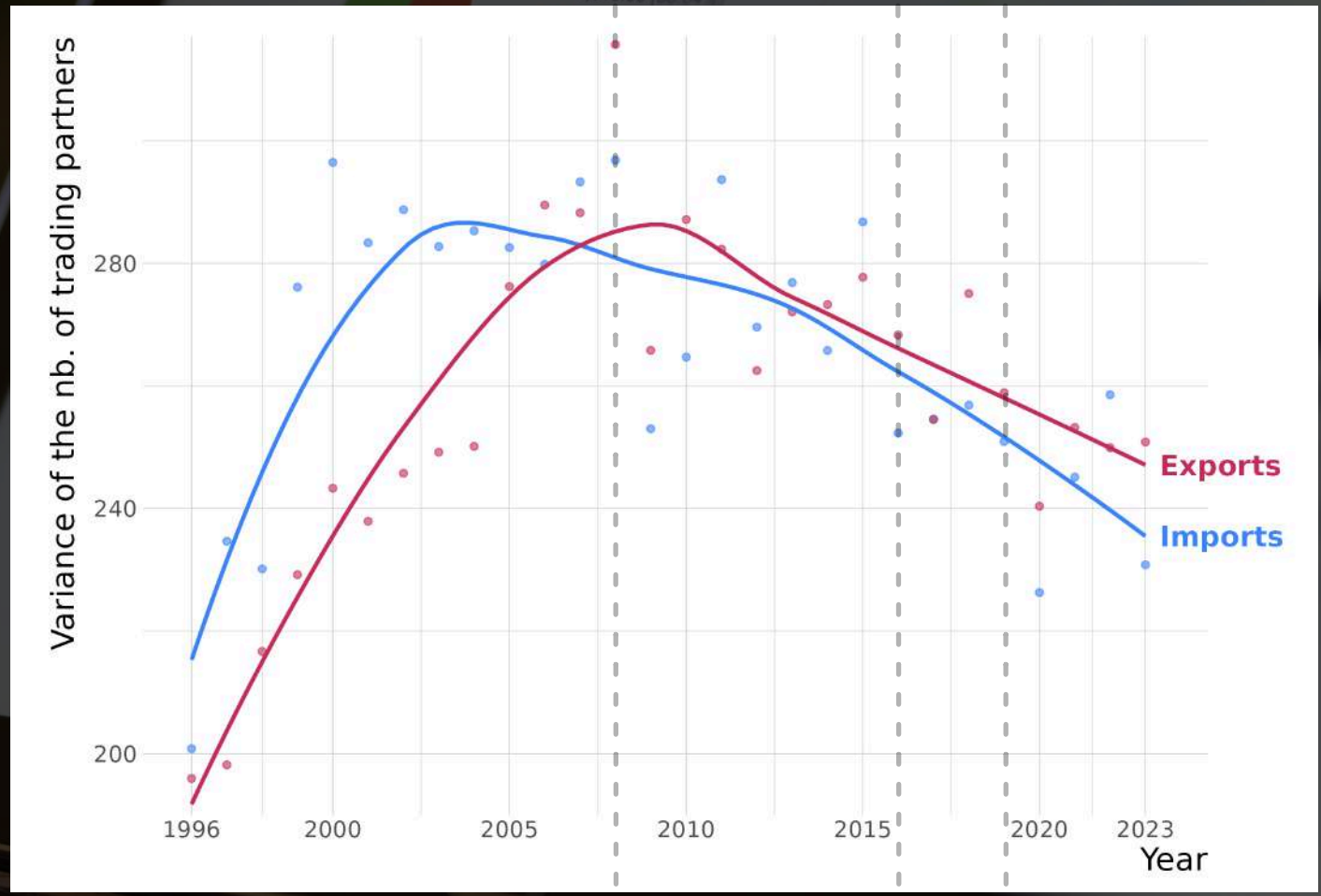


Figure. Variance in the number of connections per node. Variances for exports are in red, variances for imports are in blue.

NETWORK CONNECTIVITY

- Skewness is always positive for both exporters and importers: greater proportion of countries with low to high connectivity
- Since 2010, skewness higher for importers than for exporters: greater proportion of poorly connected countries among importers than among exporters

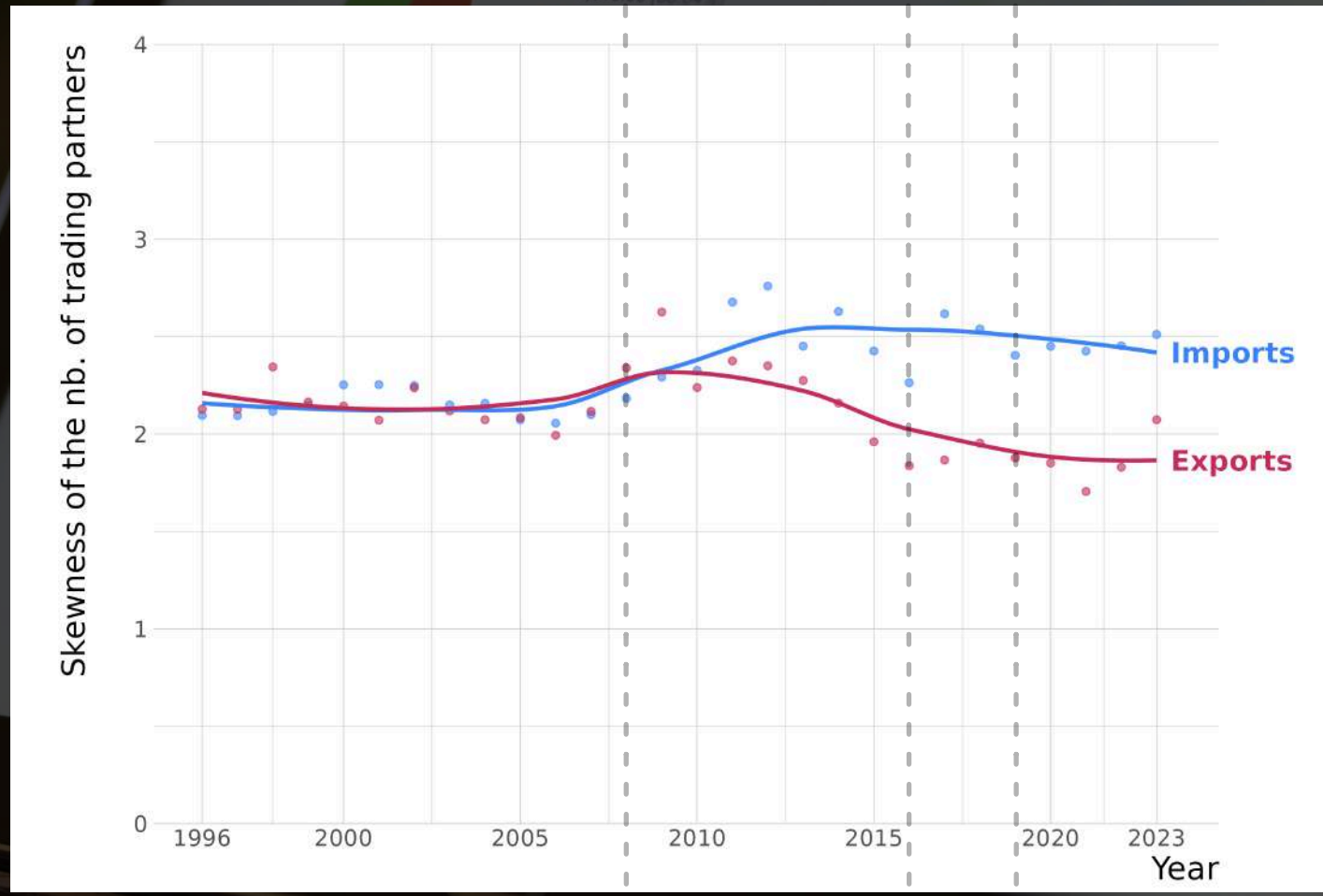
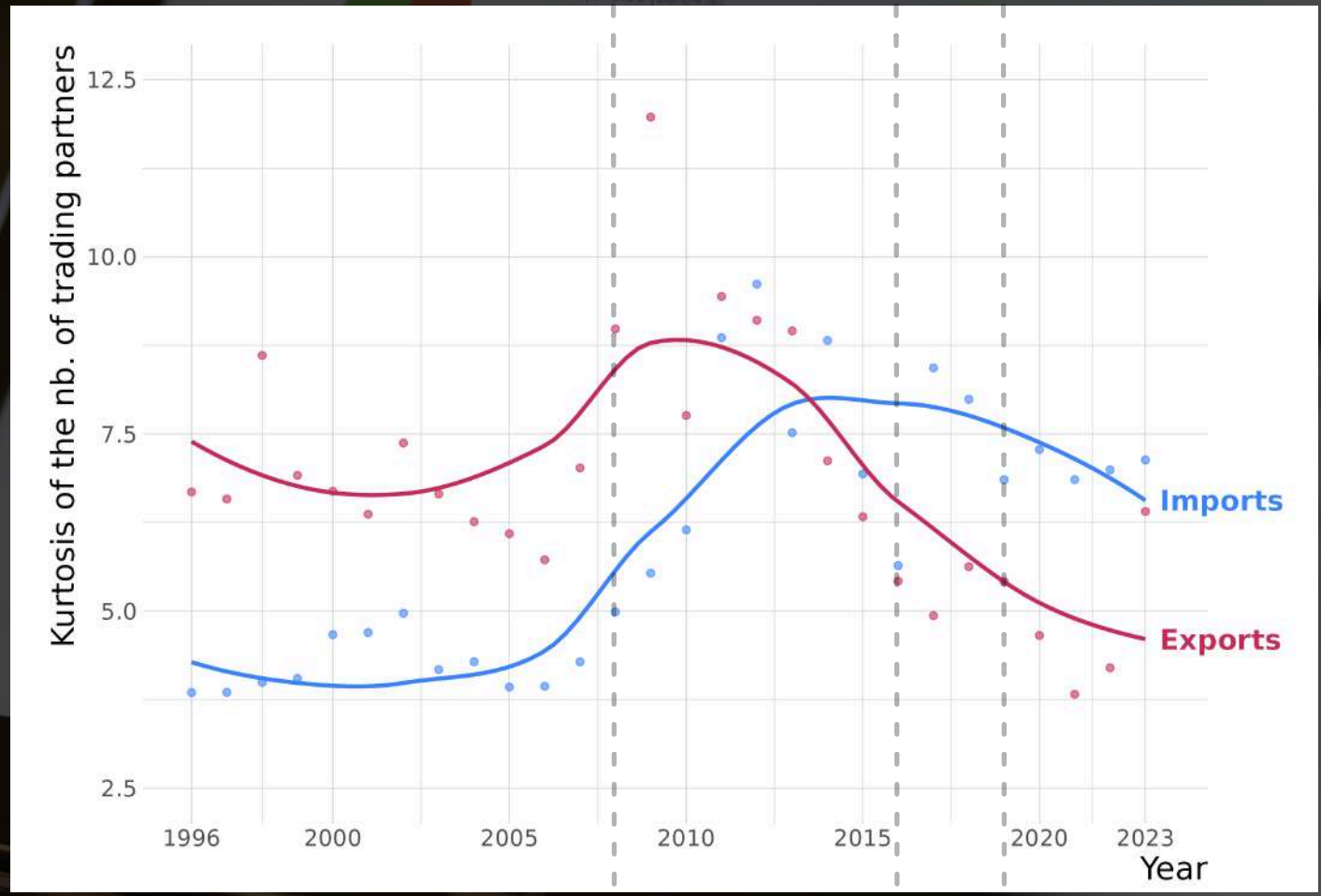


Figure. Skewness in the number of connections per node. Skewness for exports is in red, skewness for imports is in blue.

NETWORK CONNECTIVITY

- Kurtosis positive for both exporters and importers: countries whose connectivity diverges from the mean connectivity are rarer than those whose connectivity is close to the mean
- Turning point after 2014: kurtosis recently became higher for importers than for exporters.



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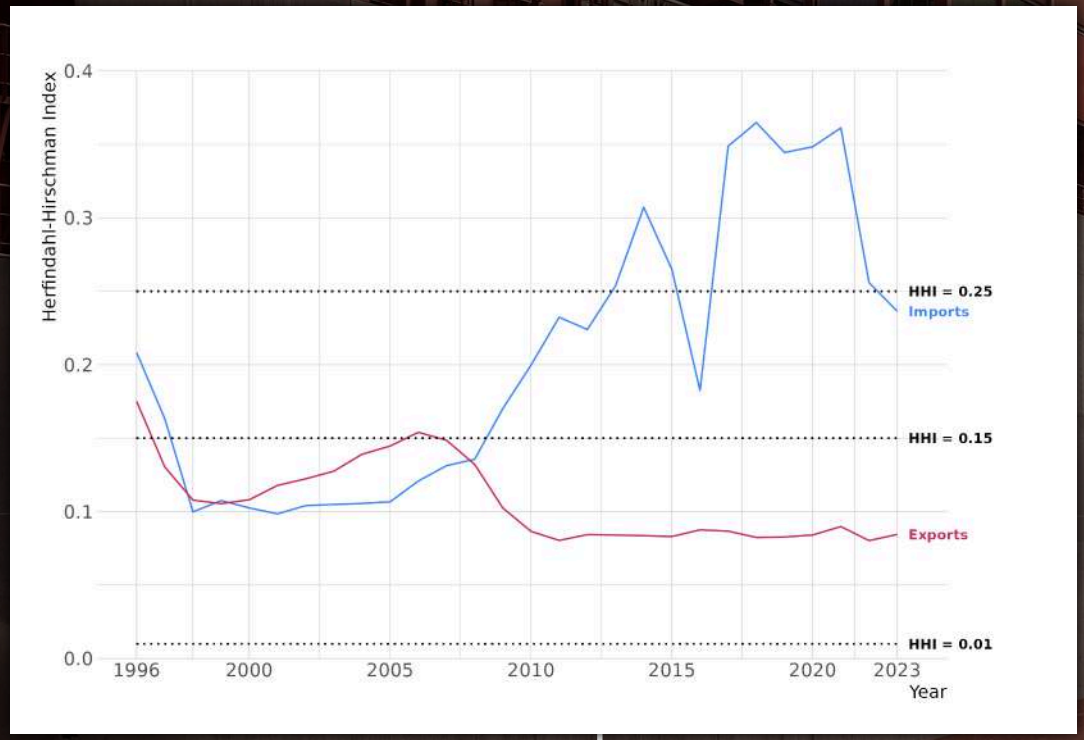
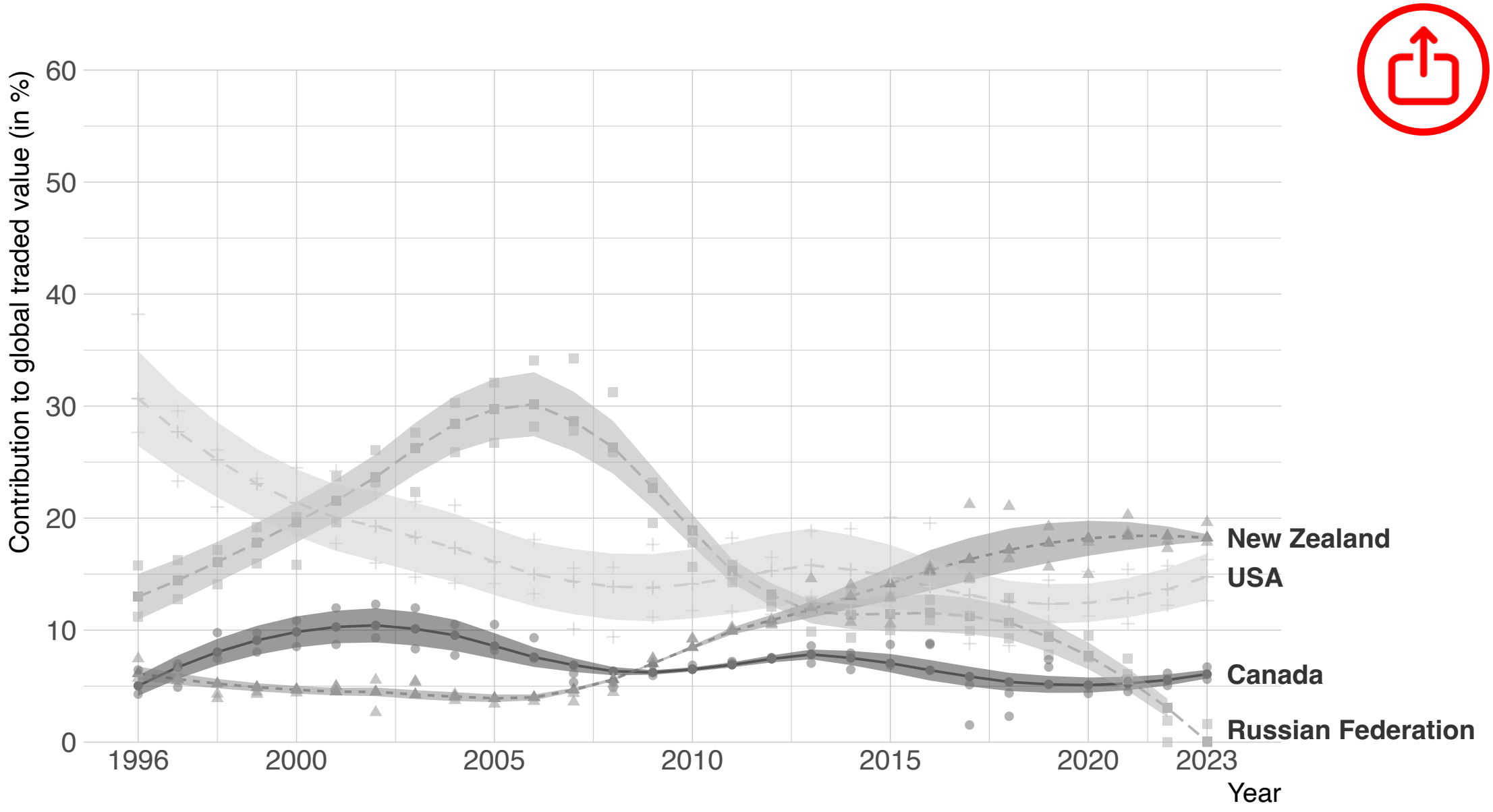


HERFINDAHL-HIRSCHMAN INDEX

Initial fall of HHI for exports and imports: rapid shift from moderate to low market concentration in roundwood trade

Rise then fall of market concentration for exports.

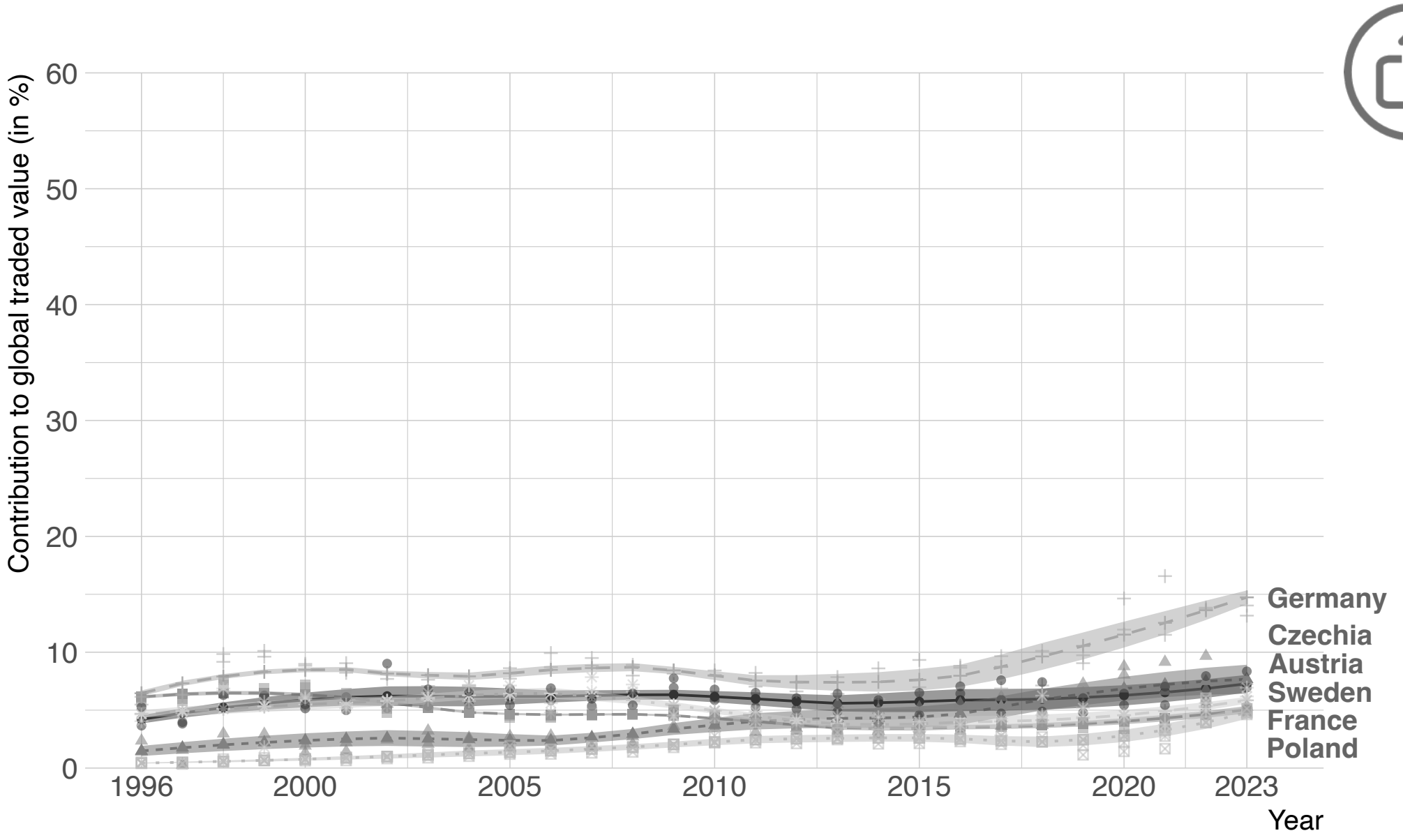
Rising (and falling ?) concentration for imports: highly concentrated market.


Contribution to global traded value (in %)
60
50
40
30
20
10
0
1996
2000
2005
2010
2015
2020
2023
Year
New Zealand
USA
Canada
Russian Federation

La Russie étend les restrictions à l'exportation de bois d'œuvre

Actualité **14.01.2022**

> Selon un communiqué de l'agence de presse russe Tass du 2 janvier, le gouvernement russe a confirmé les mesures d'évitement de l'export de bois non transformé qu'il avait annoncées. Les taxes à l'export, déjà en vigueur depuis juin 2021, sont augmentées dans le pays du 2 janvier au 31 décembre 2022 pour les bois dont le taux d'humidité est supérieur à 22% et dont l'épaisseur et la largeur sont supérieures à 10 cm. Une décision visant à empêcher l'exportation de bois brut déguisé en bois d'œuvre.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2020
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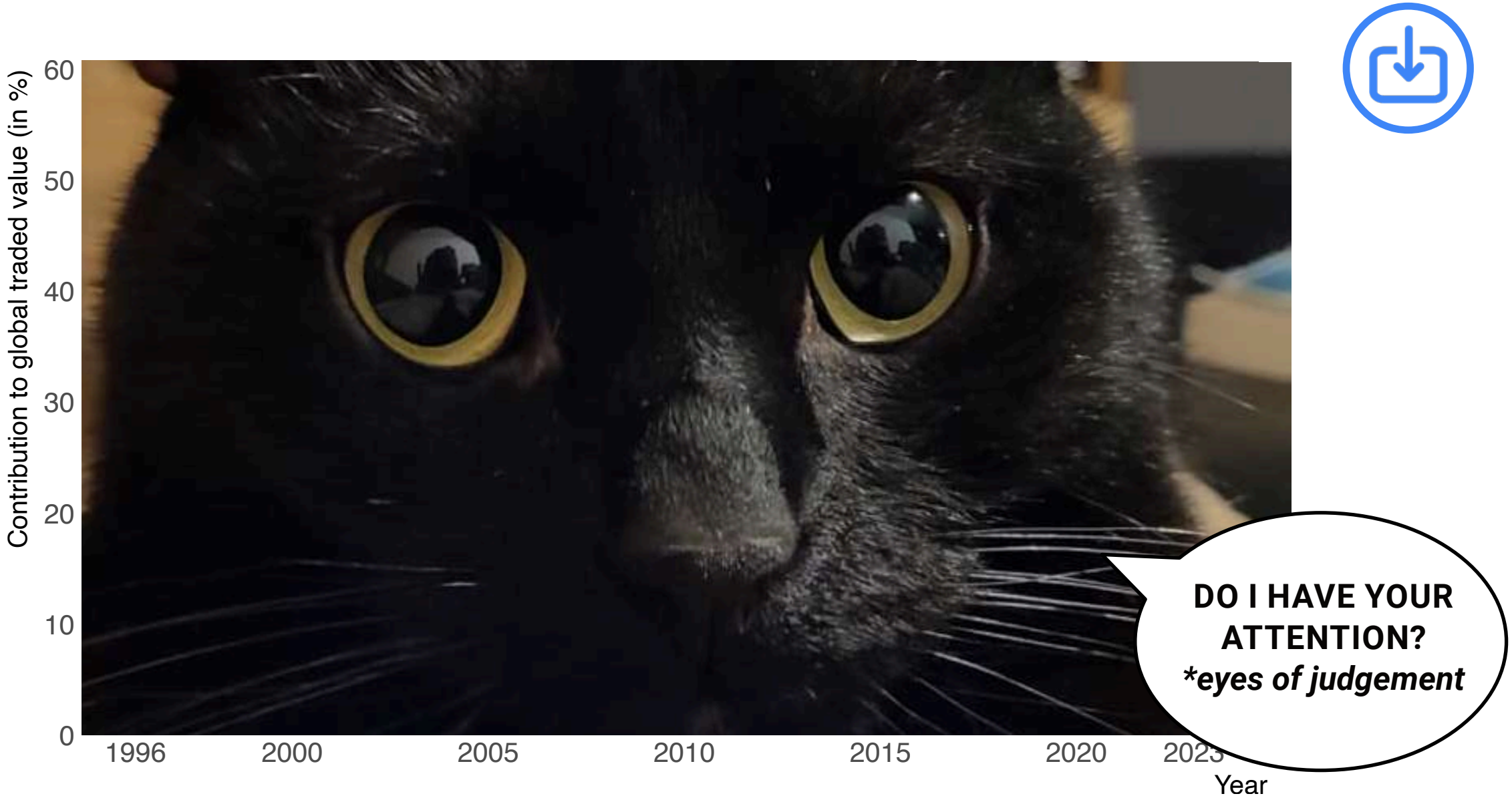
Year
Germany
Czechia
Austria
Sweden
France
Poland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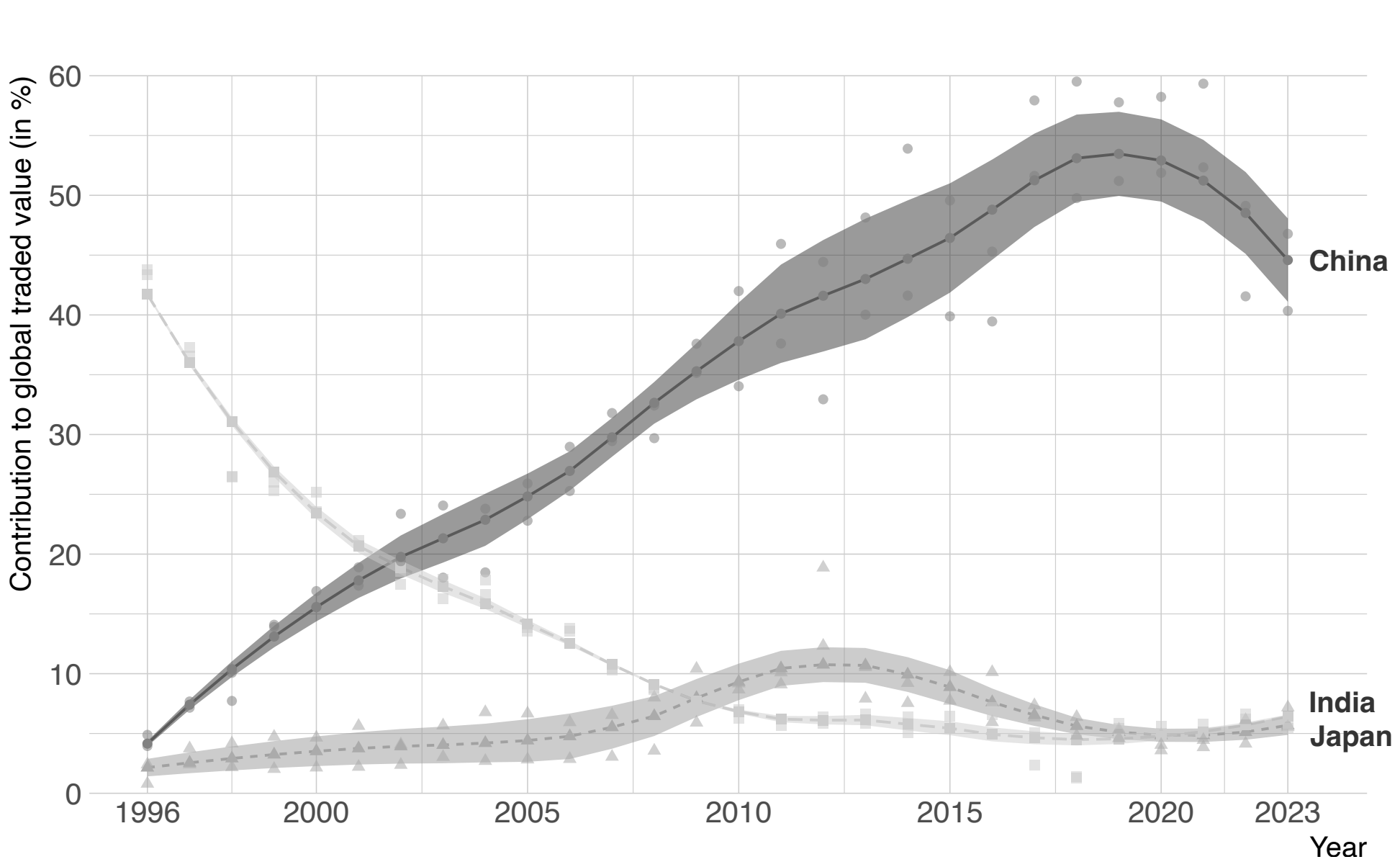
DO I HAVE YOUR ATTENTION?
*eyes of judgement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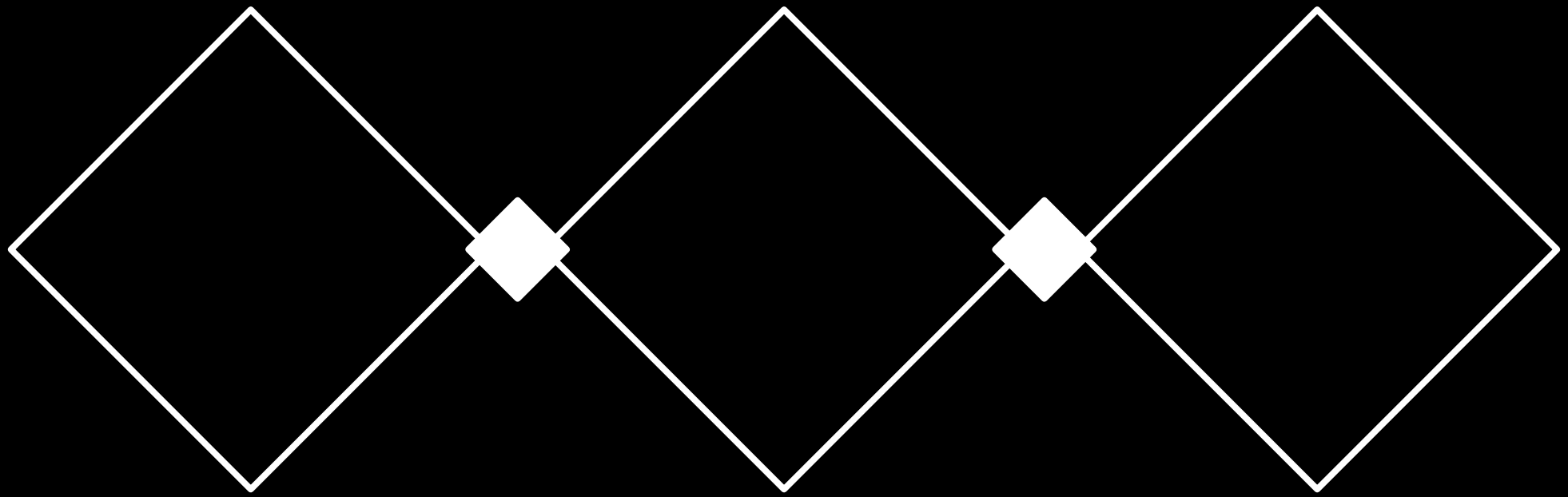
Year
China
India
Japan

THREE BROAD CATEGORIES OF EVENTS TO EXPLAIN SHORT-TERM VARIATION



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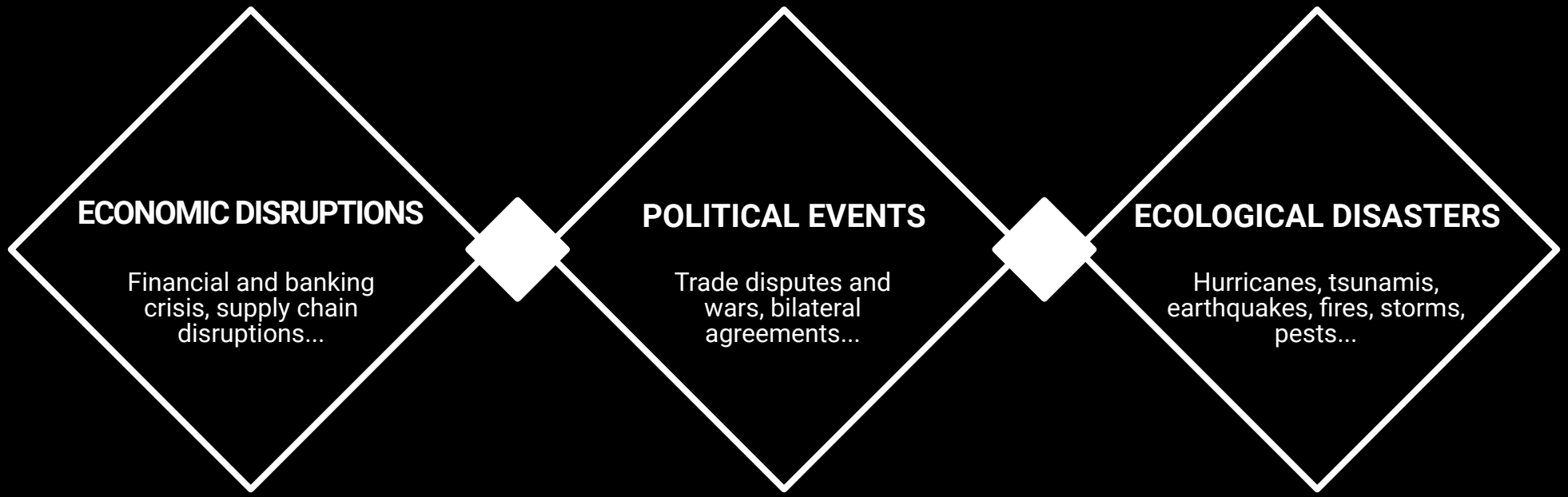

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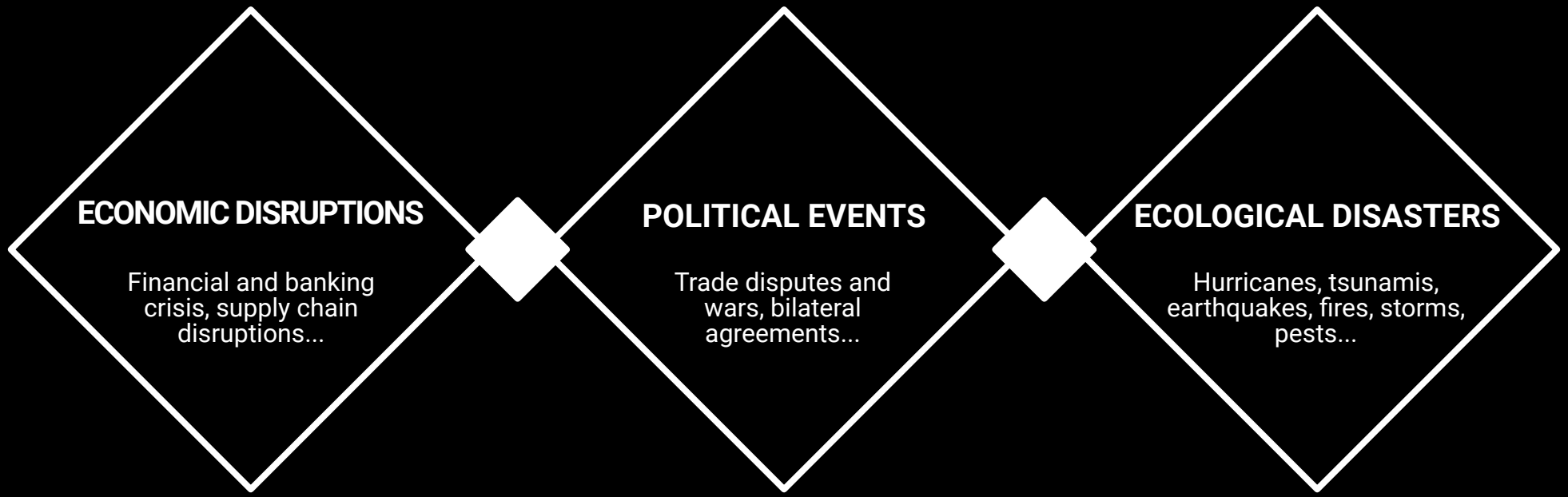


BUT, THE NETWORK SEEMS TO RECOVER THE YEAR AFTER

THREE BROAD CATEGORIES OF EVENTS TO EXPLAIN SHORT-TERM VARIATION

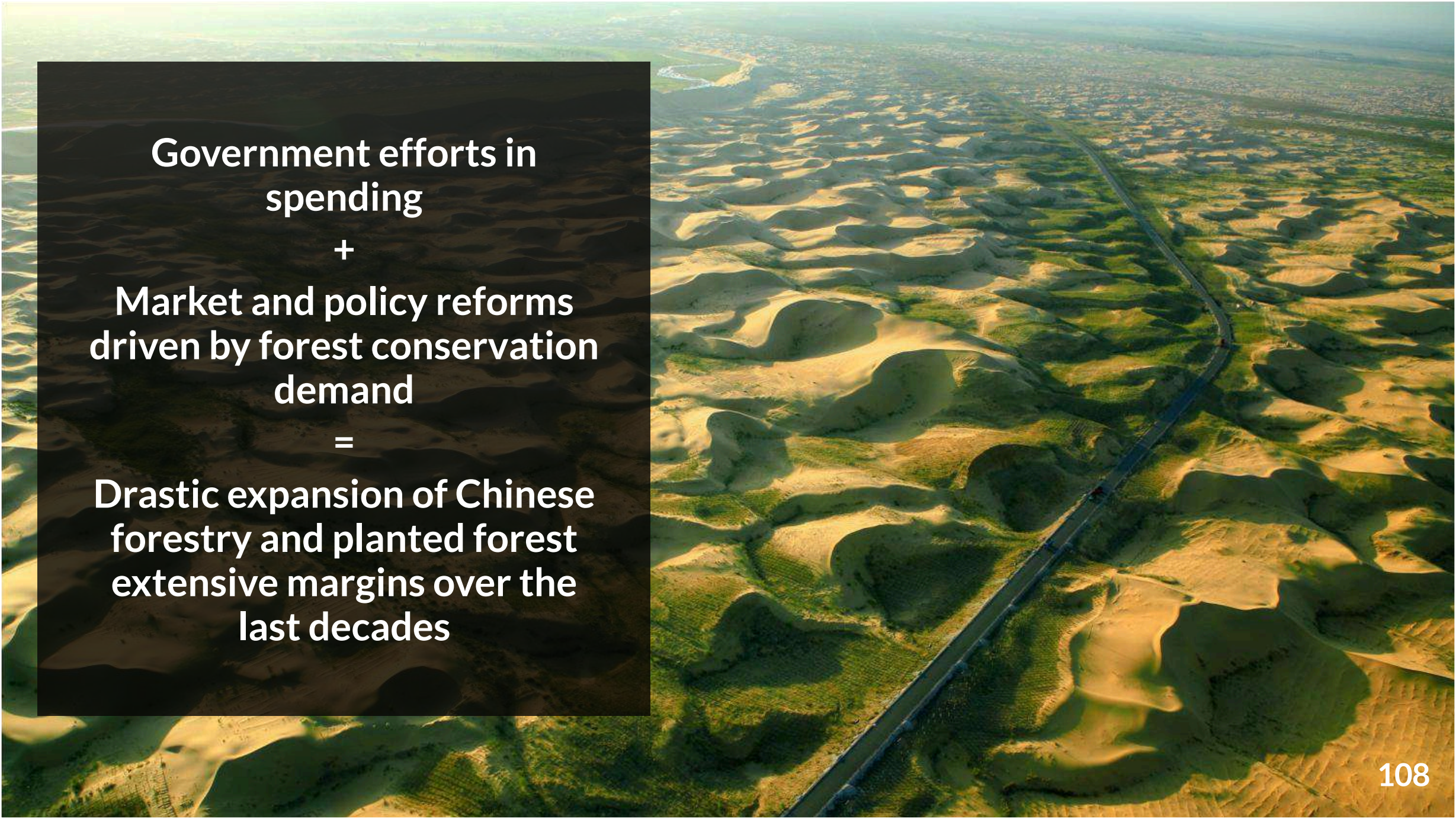
THE TRADE NETWORK IS RESILIENT TO EXOGENOUS SHOCKS AND RATHER FOLLOW LONG-TERM TRENDS

BUT, THE NETWORK SEEMS TO RECOVER THE YEAR AFTER

LONG-TERM TRENDS AND PATTERN

- Better integration of countries engaging in trade and trade intensification
- *Uneven structure of trade*: a few highly-connected countries dominate and concentrate trade, while most of the network consists of poorly-connected countries that barely contribute to roundwood trade volumes
- Increasing concentration of the import market

THE CHINESE PARADOX


Government efforts in spending
+
Market and policy reforms driven by forest conservation demand
=
Drastic expansion of Chinese forestry and planted forest extensive margins over the last decades

Government efforts in spending

+

Market and policy reforms driven by forest conservation demand

=

Drastic expansion of Chinese forestry and planted forest extensive margins over the last decades

BUT, low economic tree planting efficiency

+

Poor forest management

=

Low stand quality and growth rates

Domestic timber consumption > domestic production

Government efforts in spending

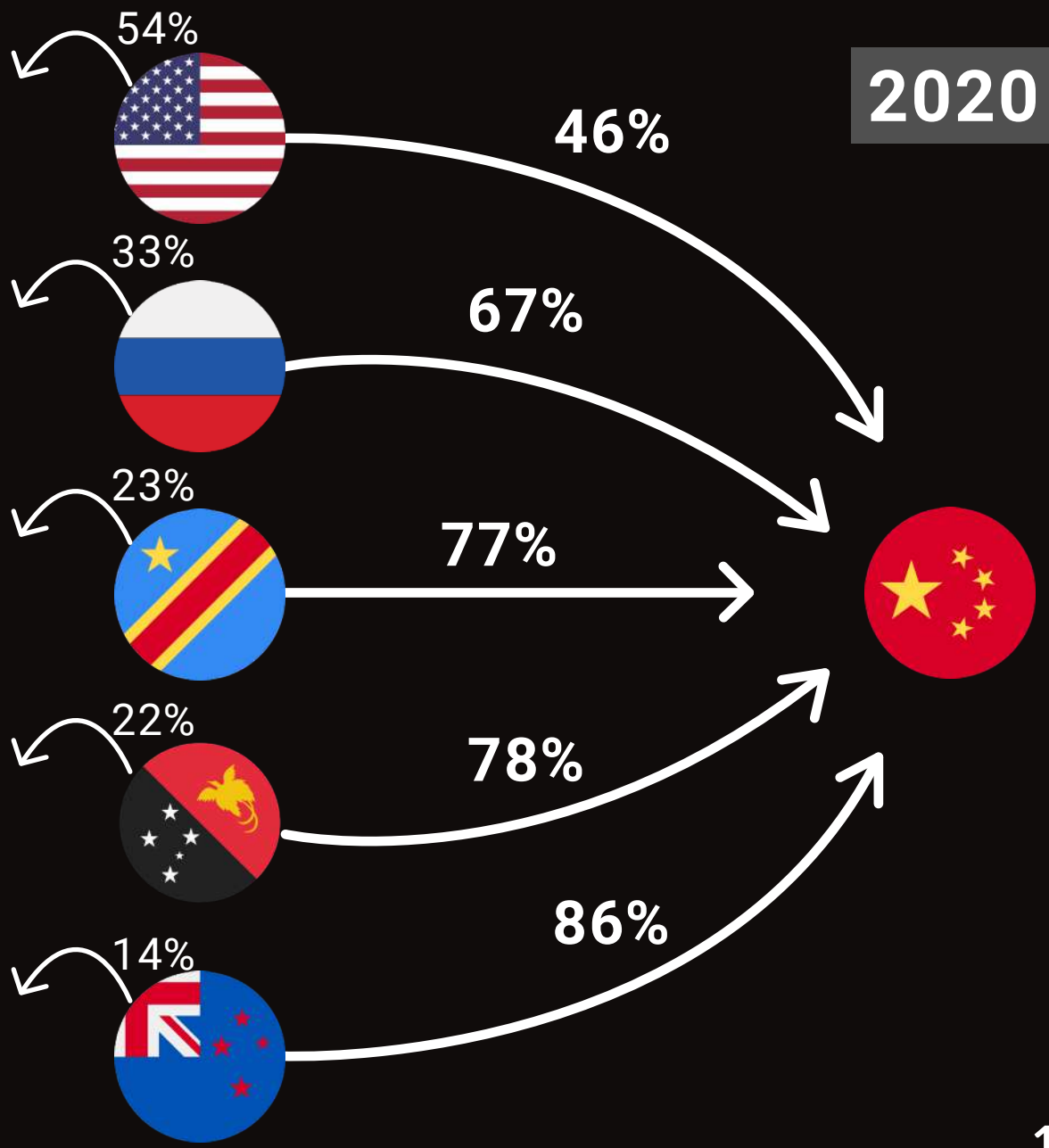
BUT, low economic tree planting efficiency

CHINA IS HIGHLY DEPENDENT ON IMPORTED WOOD PRODUCTS, WHICH NOW ACCOUNT FOR APPROXIMATELY HALF OF ITS TOTAL TIMBER SUPPLY

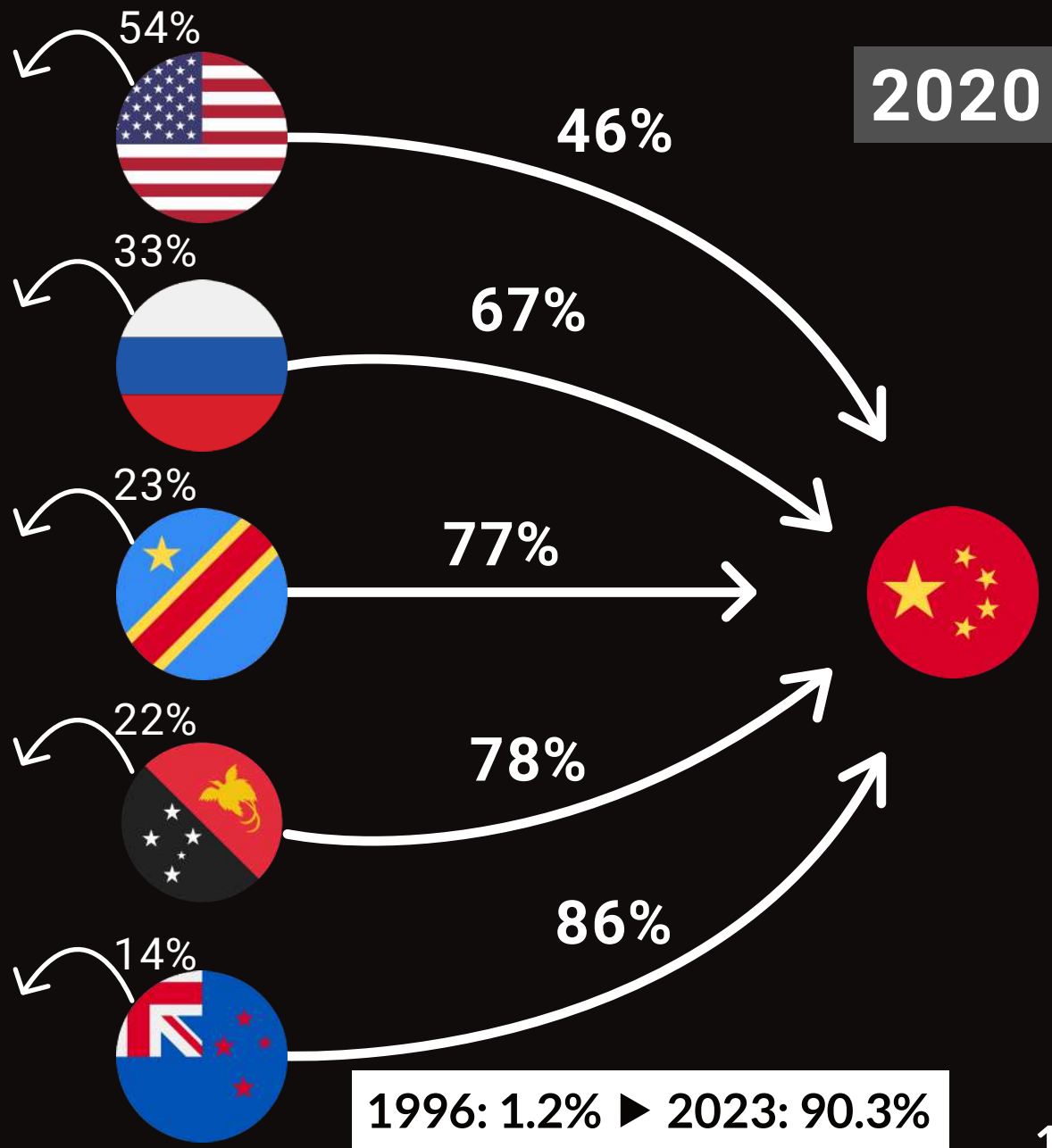
forestry and planted forest extensive margins over the last decades

Domestic timber consumption > domestic production

CO-DEPENDENCE WITH CHINA



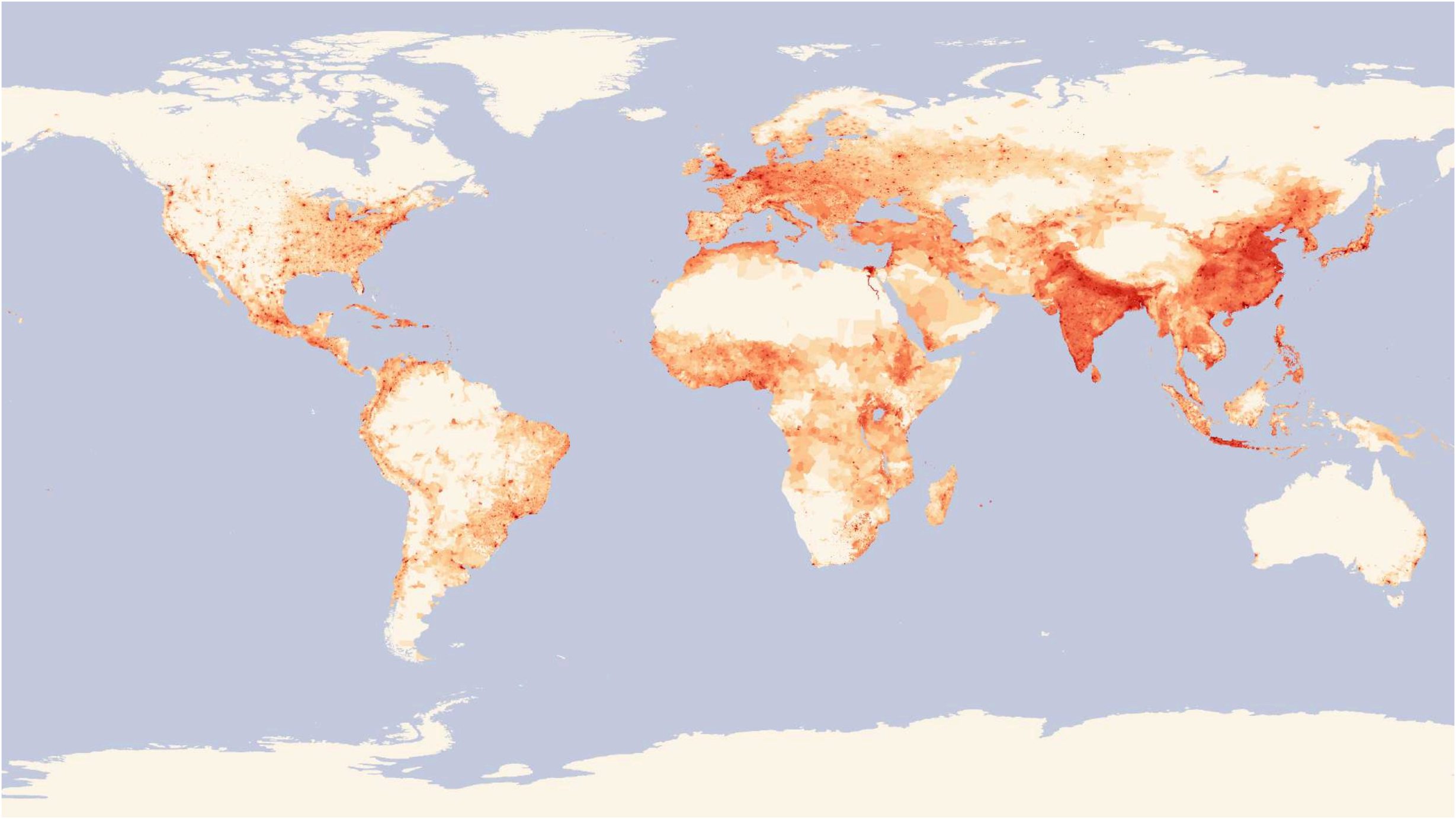
CO-DEPENDENCE WITH CHINA



ROUNDWOOD TRADE FLOWS ARE PREDOMINANTLY DEMAND-DRIVEN


Shanghai
1984
2016

URBANIZATION IS A MAJOR DETERMINANT OF MATERIAL CONSUMPTION



La fuite du chêne français en Chine

Mardi 13 juillet 2021

ÉCOUTER (5 MIN)

Grumes de chêne dans une scierie de l'Indre, juillet 2021 ©Radio France - Anne-Laure CHOUIN

La filière bois française lance un cri d'alarme : les volumes de chêne français achetés par la Chine en ce moment pourraient bien mettre le secteur en péril. Ces exportations massives constituent autant de matière première que ne pourront pas travailler les scieries et les artisans français.

La France laisse t-elle partir ses chênes vers la Chine ? Depuis quelques mois, avec la hausse de la demande en bois et l'envolée du cours des matières premières, on assiste à une ruée des acheteurs étrangers, particulièrement chinois, sur le chêne français. Notamment parce que **la Russie, grand producteur de chêne, a décidé de stopper ses exportations.** Mais également parce que **la Chine souhaite préserver ses forêts.**

C'est donc en partie la France qui répond à la demande internationale, au détriment de sa propre filière bois. **Les scieries et les artisans craignent de ne bientôt plus pouvoir se fournir.**

La Chine vide la France de ses forêts et de son bois, une "aberration économique et écologique" selon les instances

Selon la FNB, les achats chinois de chênes français ont grimpé de 42 % à fin mai, par rapport à 2020. / Unsplash

Nos dernières vidéos

Cugnaux : le peintre Bernard

Les plus lus

Lus Commentés

1 **Télé - médias.** Polémique dans "La France a un Incroyable Talent" : la production de M6 s'explique sur la séquence de la flûte

2 **Cyril Hanouna.** Insultes de Cyril Hanouna envers Louis Boyard : Olivier Véran et Yaël Braun-Pivet réagissent et taclent cette "dérive" du débat

3 **Sécurité.** Armes à feu, munitions, couteaux... les Français vont pouvoir se débarrasser de leurs armes non déclarées

4 **Votre retraite.** Retraites complémentaires Agirc-Arrco : pourquoi le projet de transfert des cotisations pourrait plomber la réforme des retraites

5 **Faits divers.** Aminat qui a appelé à porter l'abaya dans son lycée, assure avoir agi pour médiatiser "l'injustice" des lycéennes voilées

The withdrawal of China

01 *External geopolitical shocks*: Russia's 2022 roundwood export ban, war in Ukraine, US-China trade war

02 *Domestic self-sufficiency policies* to reduce reliance on wood imports (National Reserve Forest Project)

03 *Domestic structural economic changes*: real estate crisis, increasing labor costs, pivot to tech.-intensive capital exports

Towards a potential “post-China” era in the global roundwood market

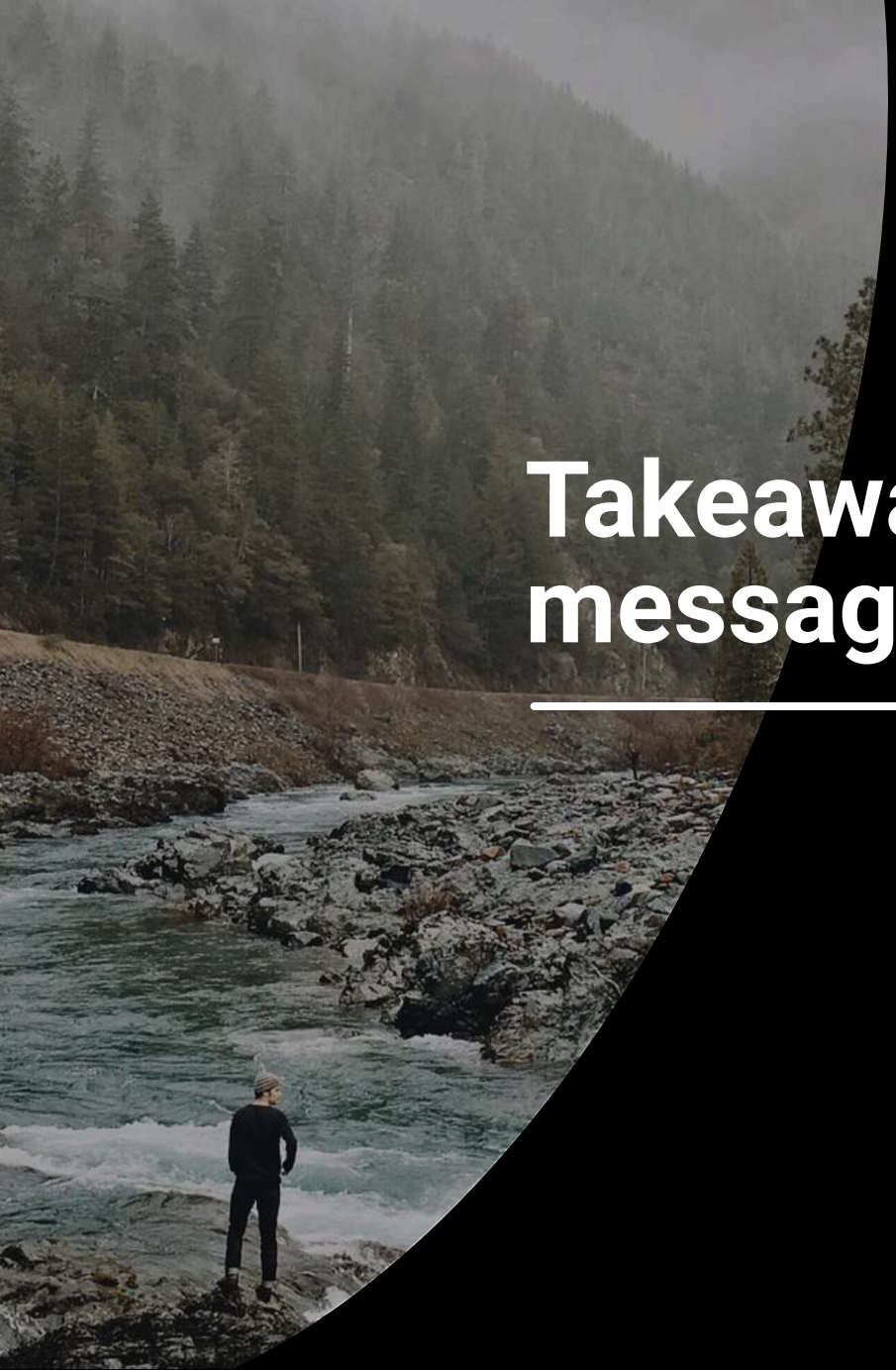
- China’s declining integration into the roundwood trade network is likely to continue
- Necessity for major exporters to identify new, sustainable markets for timber supply (*e.g.*, New Zealand)
- The world is becoming increasingly fragmented and marked by policy uncertainty

05 Conclusion, and some takeaway messages.

OBJECTIVES

A course on international timber trade

1. Taking a step back: from France to international forest issues.
2. International trade data for wood products: scope and limits.
3. Data storytelling: what do the data say?
4. A game of trade: theoretical intuitions on trade mechanisms.



Takeaway messages

- The roundwood trade network shows **short-term resilience to exogenous disruptions**
- It follows l**ong-term trends**, becoming more interconnected and structurally concentrated
- It presents an **uneven structure** were highly-concentrated countries dominate and concentrate trade
- It is **polarized around China's market dominance**, which rapidly grew to concentrate over 56% of total trade value by 2021, due to its import demand, with **potential co-dependences**
- The **recent decline in China's contribution** post-2021—a result of geopolitical shocks, domestic self-sufficiency policies, and structural economic shifts—**signals a fundamental shift trade**


Thank you!