



**CHINA AND FOREST TRADE IN THE ASIA-PACIFIC REGION:**

**IMPLICATIONS FOR FORESTS AND LIVELIHOODS**

**中国与亚太地区国家林产品贸易研究**

**A BRIEF OVERVIEW OF  
CHINA'S TIMBER MARKET  
SYSTEM**

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# **A BRIEF OVERVIEW OF CHINA'S TIMBER MARKET SYSTEM**

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A Brief Overview of China's Timber Market System  
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## **EXECUTIVE SUMMARY**

China's timber market system has undergone reform as a result of the increasing liberalization of its markets. Timber production and distribution were monopolized by the government prior to the 1980s, but a gradual transition from state allocation to market liberalization occurred during the late 1980s and early 1990s. Currently timber producers are allowed to market their timber directly to different buyers, although timber harvest and transport remain under state supervision.

China's primary wood-processing industry and wood-consuming sectors have experienced rapid growth. The limited amount of domestic resources and strong domestic demand for timber products in industries such as construction, furniture and panel have caused the volume of China's imports of forest products to increase. While the government has attempted to reduce imports by establishing commercial timber resources through fast growing plantations, the gap between domestic supply and demand will continue to be filled by imports in the near future.

## **INTRODUCTION**

Since the late 1980s, China has played an increasingly major role in world forestry, both as a producer and a consumer market. The booming Chinese economy has led to an ever-increasing demand for high quality value-added wood products. As a result, China has become one of the leading wood-consuming countries in the world. In 2001, consumption of industrial roundwood (logs), sawnwood, wood-based panels, pulp, paper and paper boards ranked third, fifth, second, fourth, and second in the world, respectively. At the same time, the Chinese forest industry has experienced rapid growth to meet the increasing demand of for wood products, both at home and abroad. For example, China's plywood production has exceeded U.S. production, making China the largest plywood-producing country in the world. China has also emerged as one of the most important players in the pulp and paper market; it contributed more than 50% of the global production growth in paper and board last decade, becoming the second largest producer in the world (He and Barr 2004).

Fast-growing demand for wood products in China together with limited domestic timber resources has contributed to increases in imports of wood products. Today, China has become a major net importer of timber and ranked first in log imports in the world.

This paper will attempt to give an overview of China's timber market, its unique distribution system, and to describe major players in this system.

## **CHINA'S TIMBER MARKET AND DISTRIBUTION SYSTEM**

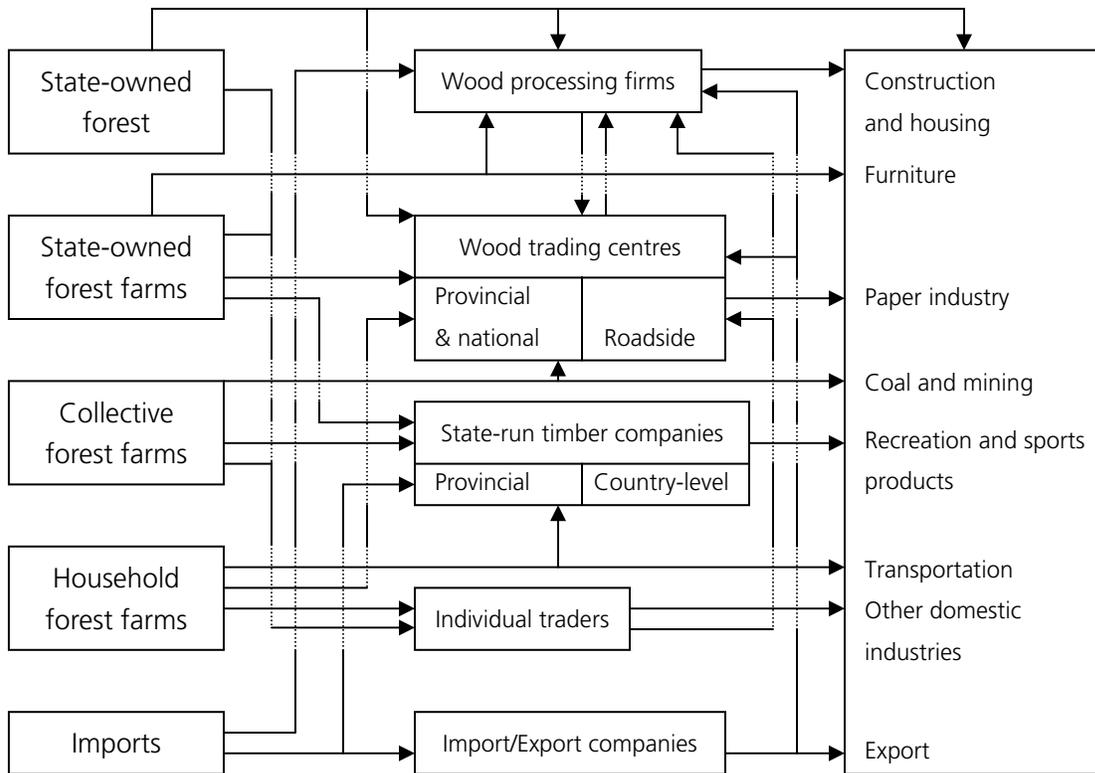
Timber production and distribution in China have gone through three distinct periods: (i) state allocation; (ii) the co-existence of state allocation and market liberalization; and (iii) liberalization under state supervision. The production and distribution of Northern timber was completely subjected to state allocation prior to 1985. Between 1985 and 1998, a large proportion was subjected to planned allocation, while a small amount was liberalized. After 1998, the production and distribution of Northern timber was fully liberalized (Zhu and Taylor 2004). Nevertheless, timber harvest and transport remain under state supervision, as logging and transport permits are issued by the government. A similar pattern governed Southern timber production and distribution. Prior to 1980, timber in the South was subject to state-planned allocation. In 1980, a small proportion was liberalized and in 1985 state-planned allocation was abolished, allowing for full liberalization (Zhu and Taylor 2004). The government, however, resumed its monopoly in timber procurement in 1987. Only in 1998, when China implemented the Natural Forest Protection Program and full liberalisation of domestic timber trade began.<sup>1</sup>

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<sup>1</sup> There is no documentation from SFA showing this full liberalization and when it started. The information was collected through a series of interviews with SFA officials and industry personnel. The starting dates for full liberalization may vary in different provinces. For example, in Fujian Province, a county called Yong'an started the forest

**Figure 1** demonstrates the general framework of China’s timber distribution system. Different timber producers use different channels to distribute their products. Wood processing firms receive raw materials directly from timber producers, timber markets, or timber companies and market their products to end-users, individuals that utilize timber to manufacture final wood products, such as furniture. Wood-processing firms are treated as a part of the distribution channel that connects timber producers and end-users.

**Figure 1: General Framework of China’s Timber Market System**



Timber markets (once called “wood-trading centers”) are now established as wholesalers. These new players have emerged as results of the market-oriented economic reform. Currently, there are hundreds of timber markets of different size in both major timber producing regions (e.g. Heilongjiang Province) and timber-consuming regions (e.g. Shanghai, Guangzhou and neighboring provinces). Timber prices are fully determined by markets, and trading volumes have been increasing over the past several years.

State-owned timber companies were once the major distributors of wood under the planned economy. They existed mainly in Southern China and focused on wood procurement within and outside the provinces on behalf of the government. The quantity traded through state-owned companies has dropped, however, since

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tenure reform in 1999 as a pilot, when non-state timber buyers/traders were allowed to buy timber directly from farmers. This indicates that a full liberalization of timber procurement in Fujian Province did not begin until 2000.

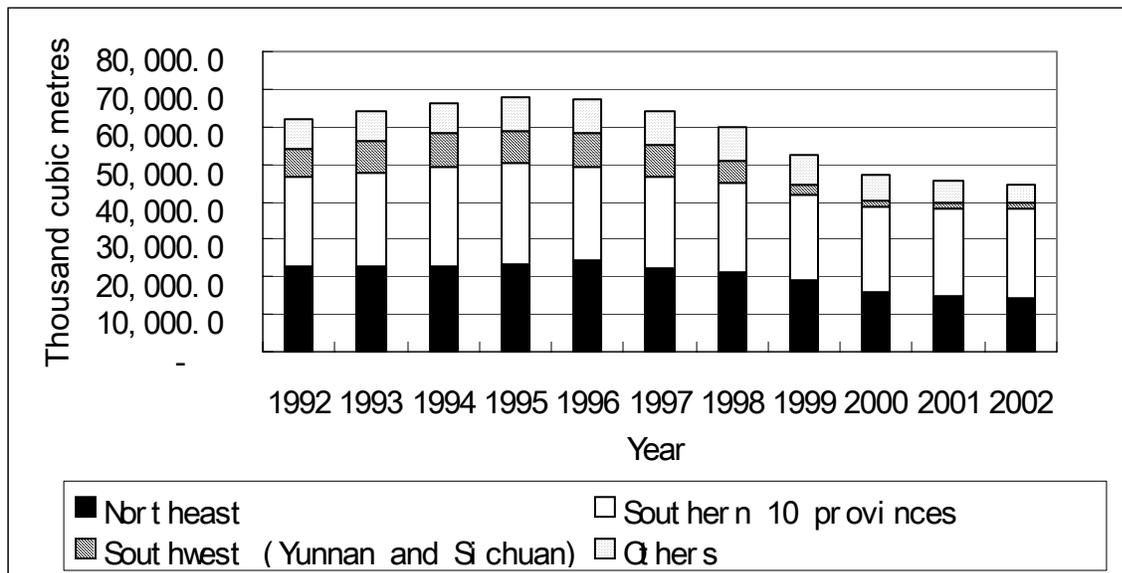
the adoption of the market economy, as individual traders have experienced an increasingly important role in distributing timber in both state-owned and collectively owned forest regions.

## TIMBER PRODUCERS

China's timber resources are distributed in three major areas: the Northeast, including the Heilongjiang Province, the Jilin Province and the Inner Mongolia Autonomous Region; the Southwest, including the Sichuan and Yunnan Provinces; and ten provinces in the South, namely Guangdong, Guangxi, Hunan, Hubei, Fujian, Jiangxi, Guizhou, Zhejiang, Anhui, and Hainan. State-owned forests are mainly in the Northeast and Southwest, while forests in the Southern ten provinces are mostly collective owned forests. **Figure 2** illustrates China's timber production from 1992-2002. Due to its limited forest resources, China has kept its timber production under state control. Several measures, such as annual allowable removal quotas, harvest permits, and shipping permits, have been used.

**Figure 2** shows the decrease in timber production after 1998, when China implemented its Natural Forest Protection Program (NFPP) or logging ban. Timber harvesting in state-owned forests has decreased greatly, while the share of timber production from collectively owned plantation forests has increased.

**Figure 2: China's Timber Production 1992-2002**



**Table 1** briefly describes the status of different timber producers. There are two types of timber producers in state-owned forest regions, state-owned forest enterprises and state-owned forest farms. There are 135 state-owned forest enterprises, mainly located in Northeast and Southwest China, where natural forests are the major resources. State-owned forest enterprises have rights to market their timber directly. Timber

production of these enterprises dropped greatly after implementation of the logging ban in 1998. According to the SFA statistics, timber production from these enterprises was 14.56 million cubic meters in 2002 (SFA 2002), a substantial decrease compared to the 30 million cubic meters that were harvested annually before 1997.

**Table 1: Description of Timber Producers**

Timber Producers (Numbers)	Major Locations	Timber Resources & Major Species	Timber Production (2002)
State-Owned Forest Enterprises (135)	Northeast	3.18 billion m <sup>3</sup> (31.52%) Coniferous: Larch, Korean pine, fir Deciduous: Oak, birch, poplar	14.56 million m <sup>3</sup>
	Southwest	2.73 billion m <sup>3</sup> (27.07%) Coniferous: Chinese fir, Yunnan pine Deciduous: Oak, birch	
State-Owned Forest Farms (about 4342)	Nationwide, typically Northwest	0.76 billion m <sup>3</sup> (7.55%)	8.48 million m <sup>3</sup>
Collective Forest Farms	Southern 10 provinces	1.8 billion m <sup>3</sup> (17.79%)**	2.39 million m <sup>3</sup>
Household Forest Farms	South & North plain regions	0.37 billion m <sup>3</sup> (3.65%)**	18.92 million m <sup>3</sup>

*Note: \*\* No data on timber resources by different farm types. These figures represent growing stocks by region, i.e., 1.8 billion m<sup>3</sup> refers to timber resource in Southern 10 provinces, and 0.37 billion m<sup>3</sup> are resources in North plain provinces.  
Source: SFA 2002; China's Forest Resources Inventory (1994-1998)*

There are over 4000 state-owned forest farms nationwide, the majority of which are located in Northwest China. Their total timber production in 2002 reached 8.48 million cubic meters (SFA 2002). State-owned forest farms can market their timber products by selling directly to either end users or timber markets.

Timber producers in collective forest regions consist of two major types: collective forest farms and household forest farms. Collective forest farms are mainly located in collective forest regions which are concentrated in Southern provinces such as Fujian and Guangdong. Under the planned economy, timber products from collective forest farms were procured at the county or province level by state run timber companies at government set prices. Since the adoption of the market-oriented economy, fewer timber products go through this procedure.

Household forest farms are most often located in the collective forest regions of Southern China and the plain regions of Northern China. These regions are rich in plantations and have experienced rapid growth in timber production. This is consistent with the government's policy to protect natural forests by shifting timber production from state-owned natural forests to collective-owned plantation forests. In 2002, timber production by household forest farms totalled approximately 19 million cubic meters (SFA 2002).

## **TIMBER DISTRIBUTORS**

The diminishing market share of Chinese state-run timber companies has caused timber markets at regional, provincial and city levels to become China's major timber distributors. According to a recent survey, there are 995 timber markets in China, including 344 wholesale and 651 retail markets. More than 70% of these markets opened during 1990s. Less than 10% (82) of these markets, however, are well established.

Timber markets tend to be differentiated along regional lines that are created by differences in local resources and economies. Traditionally, timber markets in Eastern and Southern coastal (consuming) regions import more timber products than regions in the North and West. Following the logging ban in 1998, however, a sudden surge of imports of Russian timber turned Northeast China into a major timber import centre. As a result, large-scale timber markets were constructed in Suifenhe and Manzhouli, the two largest entry gateways for Russian timber. These two markets are very narrowly focused on importing, processing and distributing Russian logs (FAS 2001).

## **WOOD PROCESSING INDUSTRY**

The wood-processing industry referred to here is the primary conversion industry, including sawnwood and wood chips, plywood, fiberboard, particleboard, and other wood-based panel sectors. China's wood-processing sectors vary enormously in sophistication. Pit sawyers operate alongside computer controlled sawmills; family operated plywood mills using dried veneers coexist with modern particleboard and medium density or high density fiberboard (HDF) plants.

## **SAWNWOOD INDUSTRY**

Traditionally, sawmills were located in forest-rich regions and most of the large sawmills were state-owned. Statistics illustrate that most sawmills are located in the Northeast state-owned forest regions and Southern collective forest regions. 2002 data shows the total sawnwood production from these regions accounted for over 90% of national total (CAF 2004a). After implementation of the logging ban in 1998, however, almost all state-owned sawmills were closed due to a lack of resources, and many large sawmills are currently operating far below their capacity. Meanwhile, numerous small family-owned sawmills or small sawnwood-processing facilities have emerged, scattered near timber market places. According to the Chinese Academy of Forestry (CAF), there are 10,350 sawmills in China, only 350 of which are considered large with an annual capacity of 30,000 cubic meters or more. (CAF 2004a).

Due to the limited domestic timber supply, sawnwood production in China has remained relatively low during the past ten years. Because of this, sawnwood has been strictly limited in the construction sector. Official data illustrates that sawnwood production was 8.52 million cubic meters in 2002 and 11.27 million

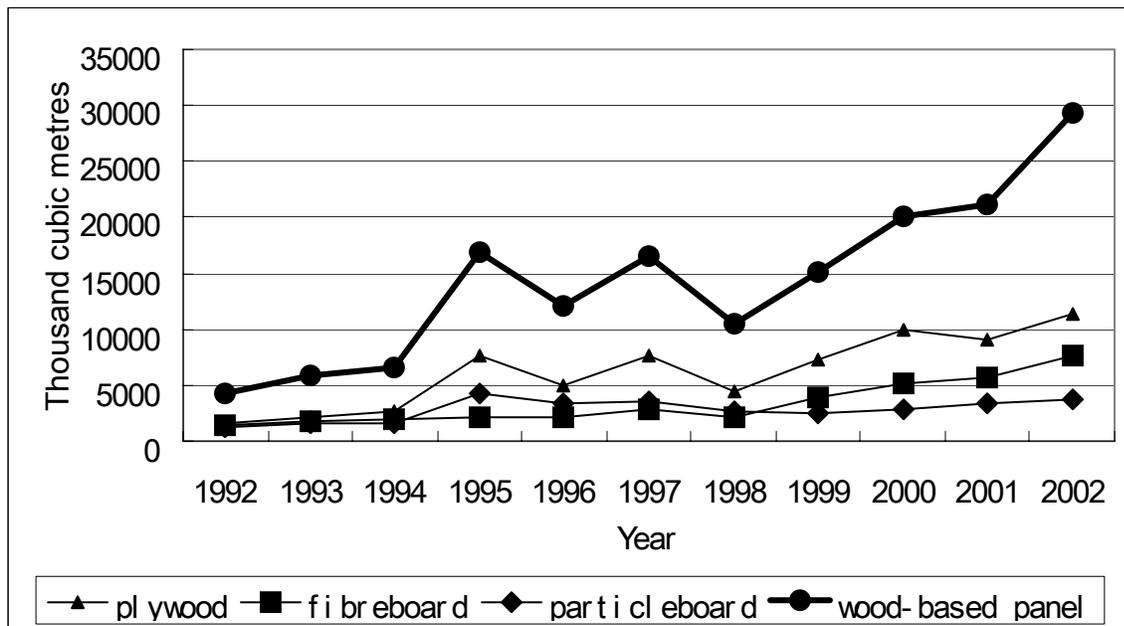
cubic meters in 2003. Since most sawmills are privately owned and small in scale, it is believed that these figures underestimate actual production. CAF estimates the real production of sawnwood was as high as 53 million cubic meters in 2002 (CAF 2004a).

### WOOD-BASED PANEL INDUSTRY

Since the 1980s, the Chinese government has encouraged investment in the wood-based panel industry which resulted in a rapid increase in wood-based panel production. Unofficial sources indicate there are more than 6,000 wood-based panel plants in China, of which plywood mills account for over 80%. The fiberboard sector experienced the second highest growth, particularly MDF (medium-density fiberboard). Industry sources reveal that by June 2003, there were 370 MDF plants in China with a total annual capacity of 14 million cubic meters (CAF 2004b).

By 2002, wood-based panel production in China totaled 29.3 million cubic meters, making China the second largest wood-based panel producing country in the world (CAF 2004b). 2003 data shows a sudden surge in wood-based panel production, which reached 45.53 million cubic meters, a 55% increase over 2002. The major wood-based panel products in China are plywood, particleboard and fiberboard, as shown in **Figure 3**. In 2003, the production of plywood, fiberboard and particleboard totaled 21.02 million cubic meters, 11.28 million cubic meters and 5.47 million cubic meters respectively and increased by 85%, 48% and 18% respectively from 2002.<sup>2</sup>

**Figure 3. China's Wood-Based Panels Production**



<sup>2</sup> Besides plywood, fibreboard and particleboard, other wood-based panel products include block board and veneer.

In 2003, China's plywood production exceeded U.S. production and China became the largest plywood producing country in the world. The fast development of China's plywood industry coincided with the rapid development of China's fast-growing forests, especially the poplar base, which provides adequate raw material to meet the expanding international market.

Wood-based panel production is concentrated in four provinces: Hebei, Shandong, Jiangsu and Zhejiang. Production of wood-based panels from these four provinces totaled 31.18 million cubic meters, accounting for 68% of the national total (SFA 2004).

Non-state enterprises are playing a more important role in China's wood panel industry. For example, there are four plywood manufacturing bases in China, namely Pizhou in Jiangsu Province, Jiashan in Zhejiang Province, Linyi in Shandong Province and Zhengding in Hebei Province. All plywood mills in these manufacturing bases are privately owned and have experienced rapid growth in the past several years. Most of these mills are small family operations. One of the four plywood manufacturing bases in China, Pizhou, hosts 2,913 plywood mills that produced 3 million cubic meters (15% of China's total) and exported 750,000 cubic meters (40% of China's total) of plywood in 2003. The biggest competitive advantage these mills have is the low price of their product due to the abundance of local, fast-growing poplar timber.

## IMPORTS

Timber imports play an increasingly important role in China's timber supply. Prior to the adoption of "opening to the outside" in late 1970s, the Chinese government applied very strict mechanisms for approving imported commodities and required companies to be licensed. Under this mechanism, only a few state authorized trading companies were allowed to trade for forest products. During the 1980s, regulation of the import trade was gradually loosened, and by 1999, import permit requirements for wood products were abolished, resulting in a significant increase of companies with import authorization. Currently any company that has legally registered for international trade is allowed to import wood products.

Nearly half of China's total commercial timber has been supplied by imports in recent years (SFA 2003). **Table 2** shows the volumes of wood products China imported in 2003. Although China imports more pulp and paper products, imports of logs have experienced rapid growth during the past several years. On the other hand, a substantial share of the wood grown or imported into China is exported in the form of processed timber, paper and finished or semi-finished manufactured products, as shown in **Table 2**. Currently, exports account for nearly 10% of China's total wood consumption. Growing investment in China's furniture industry and the rapid development of its paper and plywood industries have boosted furniture, paper products and plywood exports. Furniture exports have increased considerably over the past several years. The proportion of export furniture, paper and plywood in 2003 reached 32%, 25% and 19% respectively of total exports of wood products.

**Table 2: China's Imports & Exports of Timber Products**

	2003 Imports (RWE m <sup>3</sup> )	2003 Exports (RWE m <sup>3</sup> )
<b>Forest Products</b>	<b>106,923,273</b>	<b>26,777,117</b>
<b>Timber Products</b>	<b>40,379,153</b>	<b>11,457,848</b>
<i>Of which:</i>		
Logs	25,455,970	9,397
Lumber	7,874,210	721,084
Plywood	1,994,455	5,105,000
Veneer	558,487	266,668
Particleboard	935,999	101,226
Fiberboard	2,509,554	114,227
Wood Chips	503,536	2,046,506
Wood Furniture	52,635	8,545,555
<b>Pulp</b>	<b>47,927,090</b>	<b>73,202</b>
<i>Of which:</i>		
Wood Pulp	23,414,740	14,952
Paper & Paperboard	18,556,521	6,699,791

Source: China's Customs 2003.

RWE = Roundwood Equivalent Volume.

## END USERS

Continued rapid economic development, coupled with current low per-capita consumption of wood products, indicates there is the potential for a substantial increase in Chinese demand for wood products. Studies show that construction, furniture and paper-making are the top three timber consuming industries (see Table 3).

**Table 3: Structure of Timber Consumption by End-Users**

Industries	Timber Consumption 2002 in Million m <sup>3</sup> (%)
Total Timber Consumption by Domestic Industries	123.76 (100%)
Construction and Housing	88.38 (71.4%)
Furniture	14.02 (11.3%)
Paper Industry	9.63 (7.8%)
Coal and Mining	7.35 (5.9%)
Vehicle, Ship and Boat Manufacturing	2.69 (2.2%)
Others	1.69 (1.4%)

Source: SFA 2003.

## CONSTRUCTION AND HOUSING SECTOR

Although the Chinese government encourages the use of non-wood materials in construction, the high demand for wood in the housing sector makes construction the largest wood consumer among all industries. In 2002, 88 million cubic meters of timber were consumed by construction companies.<sup>3</sup> The government's mission to improve Chinese living conditions by building affordable apartments will only increase wood consumption in the sector.

High economic growth has caused a surge in the construction of housing, luxury hotels and office spaces. Increased standards of living and the emergence of a wealthy class of consumers, particularly in large cities such as Beijing, Shanghai, and Guangzhou, have translated into an increased demand for high quality wood for home and office decoration and furnishing. According to China's Building Decoration Association, , China's interior decoration market will grow at a rate of 20% annually over the next few coming years.

## FURNITURE SECTOR

After twenty years of rapid development following economic reform and "opening to the outside", China's furniture industry has achieved considerable scale and vigor. SFA statistics show that 14 million cubic meters of timber were consumed by the furniture industry in 2002 (SFA 2003). The strong demand for furniture will cause timber consumption to grow in the coming years.

The total output value of the furniture industry in 2003 reached US \$24.7 billion, an increase of 22% from 2002. Currently, there are over 50,000 furniture manufacturing enterprises in mainland China that employ 5 million people.

Among the furniture manufacturing enterprises, non-state-owned enterprises are most predominant, with foreign funded enterprises and civil-run enterprises occupying major roles. Furniture manufacturers from Taiwan, Hong Kong, Singapore and other Southeast Asian countries relocated their facilities to China to take advantage of low business costs. Most furniture manufacturing enterprises are small-scale, have distinctive regional characteristics and are mainly found in South China, East China, North China and Northeast of China. Concentration is very high in the Guangdong province in Southern China, where there are more than 6000 enterprises accounting for 12% of the total. Guangdong is home to 30% of the country's overall furniture production (by value). Its exports make up an even higher percentage (50.5%) of the nation's total furniture export value (Xu, Cao and Hansen 2003), followed by the provinces Zhejiang, Fujian and Jiangsu.

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<sup>3</sup> In urban areas, construction companies mainly use wood for non-structural applications, such as interior decoration and furnishing. In the countryside, farmers use wood for both structural and non-structural applications.

## **PULP AND PAPER INDUSTRY**

There are roughly 3,500 paper mills in China that produced about 37.8 million tonnes of paper and paperboard in 2002 (China Technical Association of Paper Industry 2003). Almost all the paper mills source their pulp from their own, integrated pulp mills. Most paper mills are located in Eastern and Southern China.

For decades, the Chinese paper industry has relied heavily on imports to meet the growing domestic and re-export demand. Historically, the industry was characterized as “small-scale,” with “low processing technology,” “insufficient wood fiber” and a “minimum capacity for producing high-grade paper” (Zhu and Taylor 2004). Non-wood fiber has been the major raw material and caused severe pollution problems. Currently, wood pulp accounts for over 20% of total pulp consumed by Chinese paper mills. However, demand for high-grade paper (e.g. coated white paperboard, kraft linerboard), which requires more wood fiber, has increased. As a result, imports of wood pulp continue to grow while large paper mills begin to secure their own raw material bases by establishing large-scale plantations.

## **CONCLUSION**

Although the government controls domestic timber production by such means as logging quotas and harvesting permits, China’s timber market has enjoyed gradual changes as a result of market liberation. Entry into the WTO has pushed China to open its wholesale market to foreign distributors. As a result, competition in China’s timber distribution will become more severe than before.

China’s strong demand for timber products will continue to grow in the coming years, driven by the rapidly developing construction, furniture and panel sectors. More wood fiber will be consumed by the paper making industry, driven by the increasing demand for high-quality paper and paper products. The gap between domestic supply and demand will grow, and timber products will continue to be imported to meet the gap.

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