China’s Import Demand for Softwood Logs and Lumber to 2022

THE CHANGING SUPPLY CHAIN IN CHINA WITH A FOCUS ON RUSSIA’S INDUSTRY/EXPORT POTENTIAL

FEATURING

Perspectives on the changing supply chain in China

End-use segments in China for imported timber

Major geographic regions in China for imported timber

Impacts of the “One Belt/One Road” initiative

Highlights of the growth in the Russian timber harvesting and sawmilling industry

A summary of Russian and other log and lumber imports to China by port

An analysis of the competitiveness of Russian logs and lumber in the Chinese market
**SCOPE**

This timely report will profile the current status and outlook to 2022 for China’s imported softwood logs and lumber. This will include a look at end use and geographical market segments in China and the fit for imports. There will be a focus on the Russian log and lumber industry and its new competitiveness, focusing on the country’s surging exports to China. Further, it will assess Russia’s export potential and penetration in China’s key end-use segments and geographical regions, and examine the fit of Russian log and softwood lumber exports in China versus other exporting countries/species. A competitive analysis of delivered log and lumber costs by major supplying country will be included.

**TIMING**

The report will be published in Q2/2018 and discussions about the findings can be arranged to meet your individual information needs.

All subscribers are offered a private, online presentation by the FEA project team that includes an open discussion about the report and addresses any company-specific issues. This consultation is included in the subscription price.

**TO SUBSCRIBE**

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**CALL:**
- U.S. +1-978-944-2610
- Canada +1-604-801-5996

**EMAIL:** lkelly@getfea.com

**FAX:**
- U.S. +1-978-486-0222

**QUESTIONS?**

Contact Russ Taylor

**EMAIL:** rtaylor@getfea.com

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**NEW REPORT:**

*China’s Import Demand for Softwood Logs and Lumber to 2022*

**QUESTIONS ANSWERED IN THIS REPORT**

For those selling into the Chinese market, it is crucial to understand the cost structures and export trends of the key exporters (especially Russia), and where the exports are moving within China. Given Russia’s explosive growth in timber harvesting and sawmill output, China has seen a surge in Russian exports since 2014. The expected demand for softwood logs and lumber in China could tax some countries’ export potential at times in the next few years. With its improved competitiveness, Russia has become the market leader. This report will answer the following questions and more:

- How much domestic Chinese softwood fiber is available to supply Chinese markets?
- What is the expected demand (and by segment) for imported softwood logs and lumber to 2022?
- How much more fiber can we expect from Russia and other exporting countries, and for how long?
- Will China need more wood from sources other than Russia (and current suppliers)?
- How competitive are imported Russian logs and lumber in China versus some of the other major exporters?
- How is China using Russian and other sources of imported wood? In what end-use segments and how does it differ by species?
- Where is Russian supply going within China versus other suppliers (ocean ports versus inland regions)?
- What is the impact on Russian and European wood products imports (e.g., block trains) from the One Belt/One Road Initiative?
- What will happen with China’s construction and housing market, and is it sustainable?
- What is the export outlook in key countries for those currently fulfilling China’s log/lumber needs, including Russia, the U.S. South (SYP), South America (taeda and radiata pine), New Zealand/Australia (radiata pine), B.C. Coast/U.S. Pacific Northwest (hemlock and Douglas-fir), Europe (Scandinavia, Western and Eastern Europe), and Western Canada (SPF)?
- What is the forecast for log and lumber prices in China?
Executive Summary

Part 1: China’s Log and Lumber Consumption and Supply Chain

End-Use Segments for Softwood Logs and Lumber
- Construction Segment
- Decoration Segment
- Furniture Production Segment
- Packaging and Other Segments
- Total China Consumption

Major Geographic Regions in China for Russian Versus Other Log and Lumber Suppliers
- Major Geographic Region Definitions/Supply Chain Overview
- Consumption Areas Around Land Ports
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- Major Consumption Areas by Rail, Truck or River Transport

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- Current Timber Situation
- Impact of Natural Forest Harvest Ban
- China Log Imports
- Current Lumber Production Situation

Overview of China Log Imports & Supply Chain
- China Log Imports by Country
- China Log Imports by Land and Ocean Ports
- China Log Imports by Main Species

Overview of China Lumber Imports & Supply Chain
- China Lumber Imports by Country
- China Lumber Imports by Land and Ocean Ports
- China Lumber Imports by Main Species

China’s Supply Chain Changing
- China’s “One Belt/One Road” Program
- China Industrial Park Development
- Emerging Supply Chain Service Providers

Part 2: Russia’s industry and Export Potential in China

Introduction & Overview
- Russia Log Supply
- Log Production
- Log Exports

Russia Lumber Supply
- Lumber Production
- Lumber Exports

Log Cost-Competitiveness in China
- Russian Log Cost Delivered to Key Chinese Ports or Destinations
- Russia Competitive Position Versus Other Major Suppliers to China

Lumber Cost-Competitiveness in China
- Russian Lumber Cost Delivered to Key Ports in China or Destinations
- Russia Competitive Position Versus Other Major Suppliers to China

Part 3: China Outlook to 2022

Outlook for Imported Logs/Lumber in China
- China Wood Products Demand Outlook
- China Housing/Construction Market Outlook
- China Imports of Logs and Lumber Outlook
- China Imports of Russian Logs and Lumber Outlook
- Main Areas in China of Increased Russian Log and Lumber Imports
- Price Outlook by Supply Source to China

Appendices

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Payment by February 15, 2018 and balance on receipt of report, plus provide input to the Table of Contents/Work Plan

Order and full payment received by March 31, 2018

Order and full payment received after March 31, 2018
**Russian exports to China and other markets will affect your business**

The quick emergence of Russia as a low-cost exporter has caught many by surprise following the 60% devaluation of the ruble. The Russian industry has responded quickly and is reinvesting in new equipment that will further solidify its low cost base. With surging exports to China, exporters need to better understand the competitiveness of Russian supply and the geographical and end-use segments being targeted by Russian exporters in China. Russian log and lumber exports have the greatest potential to impact trade flows and prices over the next few years. Company marketing and export plans need to consider what to expect in China as Russian exports expand.

**China is running out of wood and will need increased imports**

China’s domestic forest harvest is decreasing, while its demand for imported logs and lumber is increasing. This is good news for exporters, but Russian exports — especially of softwood lumber — have taken the bulk of the increase. China’s market demand and import outlook will be assessed in relation to the potential supply from Russia and other exporting countries. Included in the analysis will be the reach of Russian exports due to shipping more kiln-dried and higher-valued lumber, as well as the impact of block trains and the One Belt/One Road initiative.

**The only report of its kind**

The best way to navigate China’s changing market requirements and competitive supply is through strategic information. This deliver market analysis and cost data on Russian supply and Chinese market trends/imports, along with realistic forecasts. It will contain a wealth of never-before-published information and insightful analysis on Russian supply, the Chinese market and distribution trends, and competition. Our mission? To help you make better, more informed business decisions.

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**China’s Import Demand for Softwood Logs and Lumber to 2022 will enable you to:**

- Obtain a five-year perspective on China’s market and demand for imported logs and lumber
- Assess the competitiveness of Russian log/lumber exports to China
- Analyze/understand competitive threats in China from Russian and other exports
- Develop and/or refine export market strategies to China
- Acquire supply, demand, cost and price histories, and forecasts by exporting country to China
- Identify potential geographic or end-use segments in China that could see increased Russian and/or other exports
- Obtain a strategic advantage to your company’s business plan around the role of Russian and/or other exports in China

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**EMAIL:** lkelly@getfea.com  
**FAX:** U.S. +1-978-486-0222

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