



Trends and outlook for forest products markets in Asia and the Pacific

Adrian Whiteman and Ragnar Jonsson
Forest Policy Service, FAO, Rome

The Future of Forests in Asia and the Pacific: Outlook for 2020
16–18 October 2007, Chiang Mai, Thailand





Structure of the presentation

- 1. Historical trends in forest products markets**
- 2. Wood raw material balance**
- 3. Some observations on recent developments**
- 4. Outlook for forest products markets**
- 5. Wood raw material balance**
- 6. Implications of the outlook for forests**

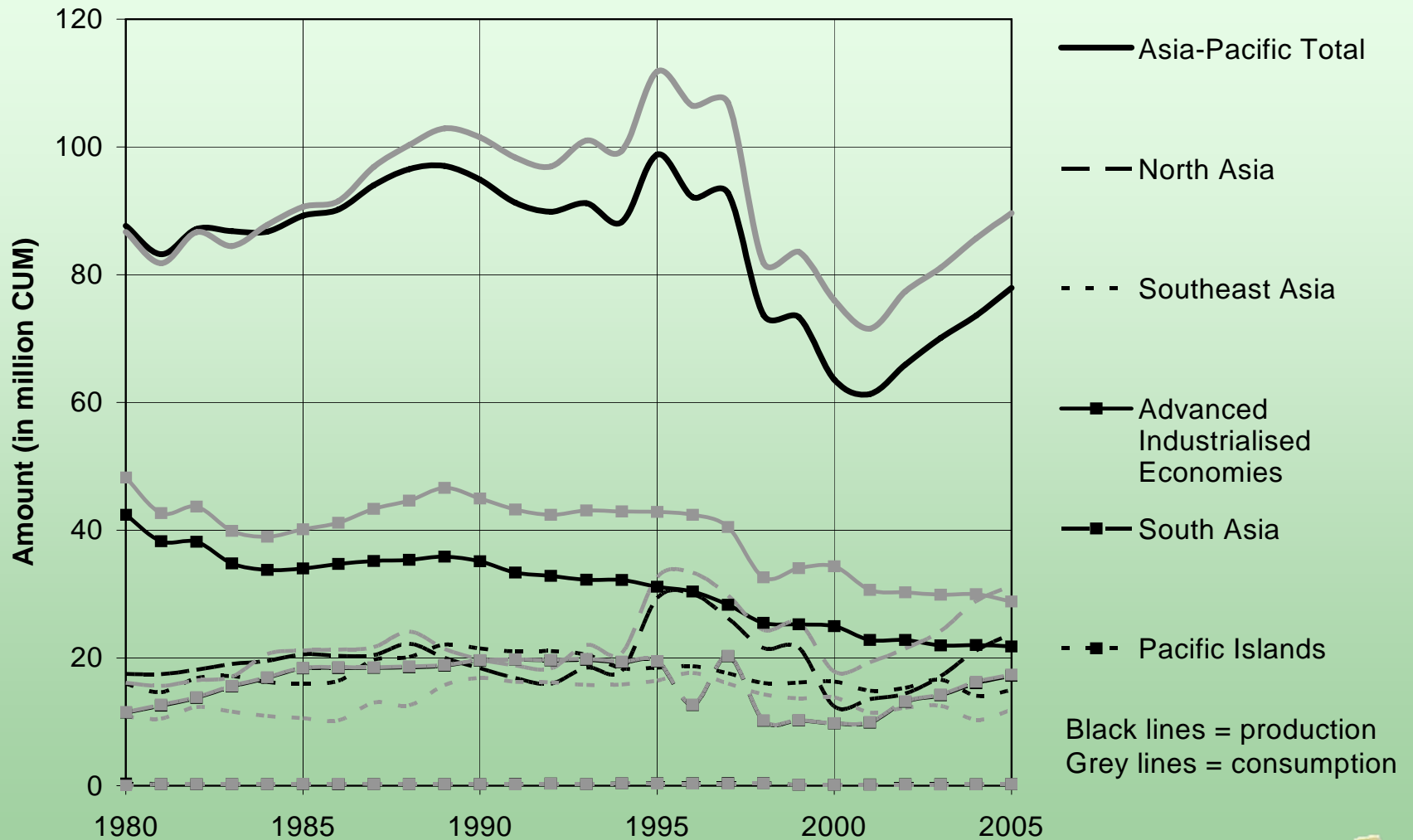


Trends and outlook: methodology

- 1. Data: FAO databases (FAOSTAT)
 Economic data from World Bank**
- 2. Econometric models of supply and demand**
- 3. Conversion factors for WRM balance**
- 4. Wood supply based on FRA data**
- 5. Provisional projections: work in progress!**

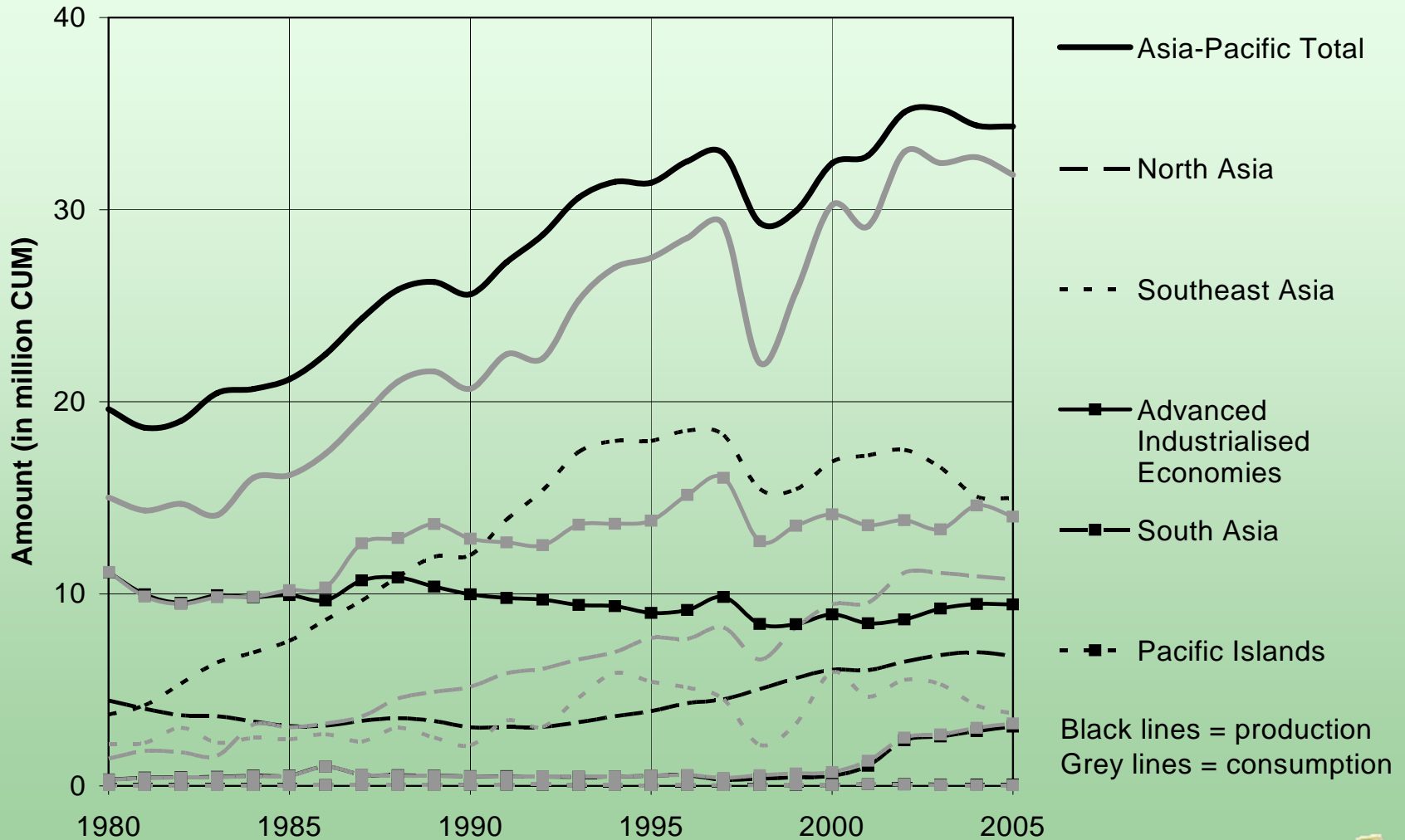


Historical trends: sawnwood



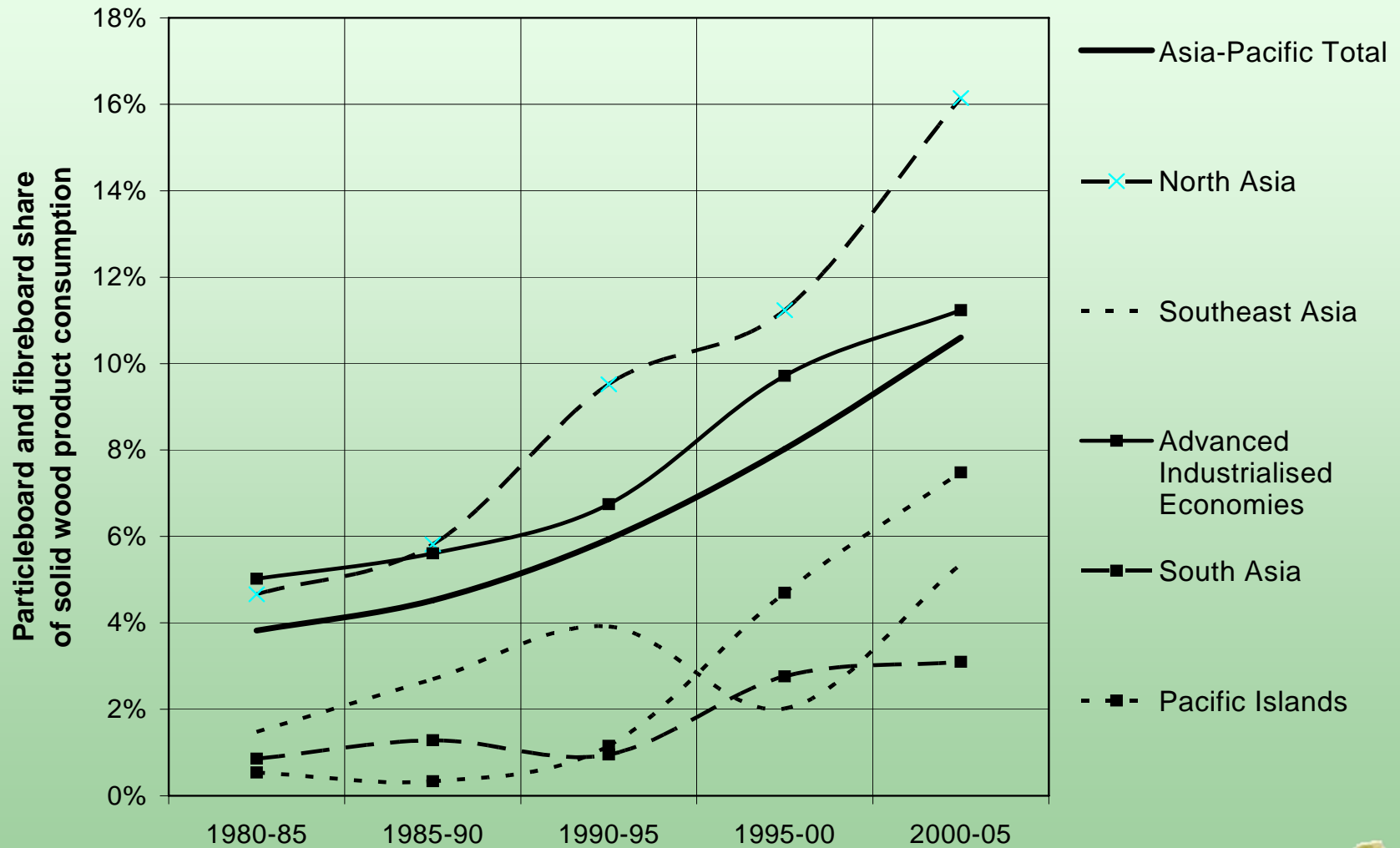


Historical trends: wood-based panels



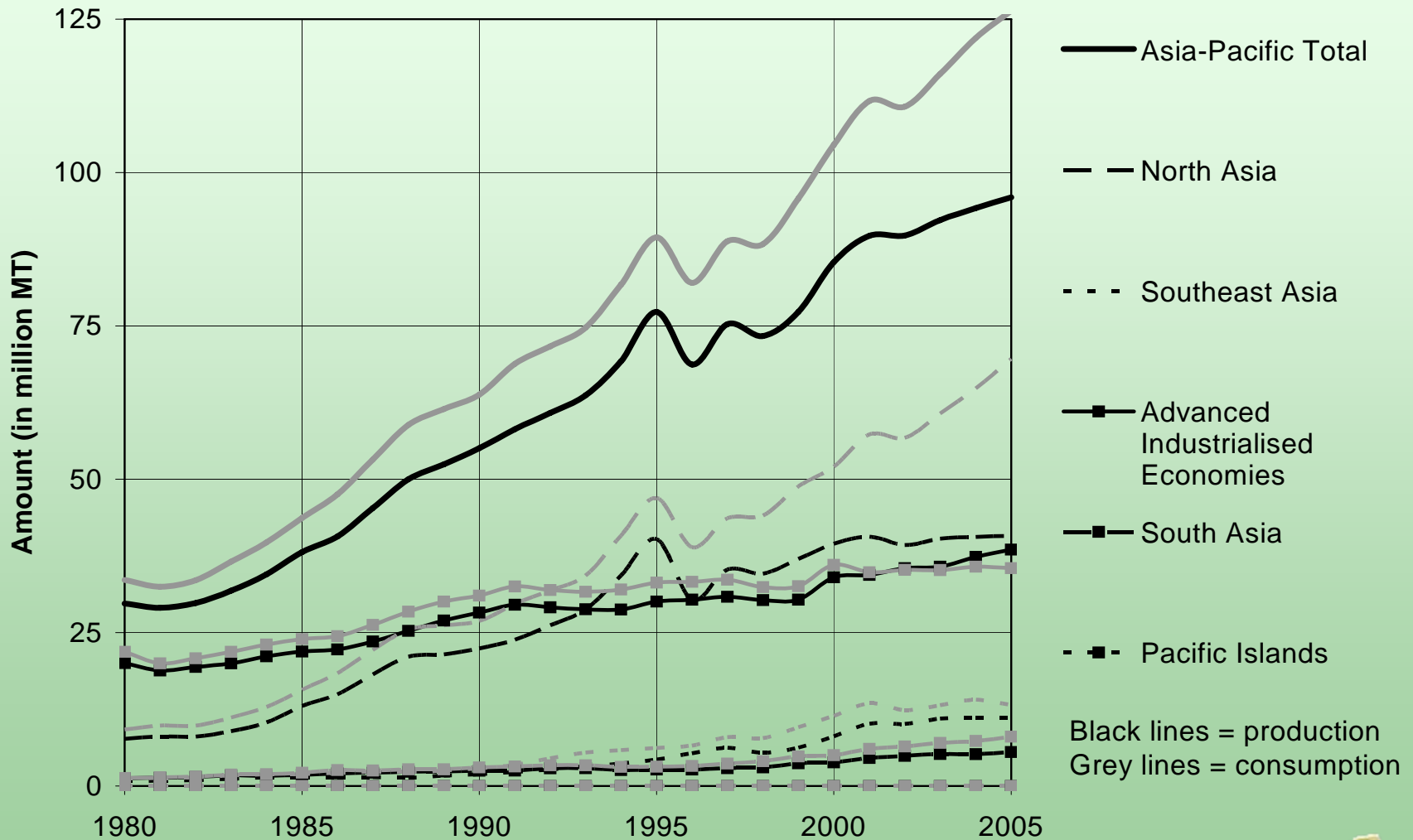


Structural trend: reconstituted panels



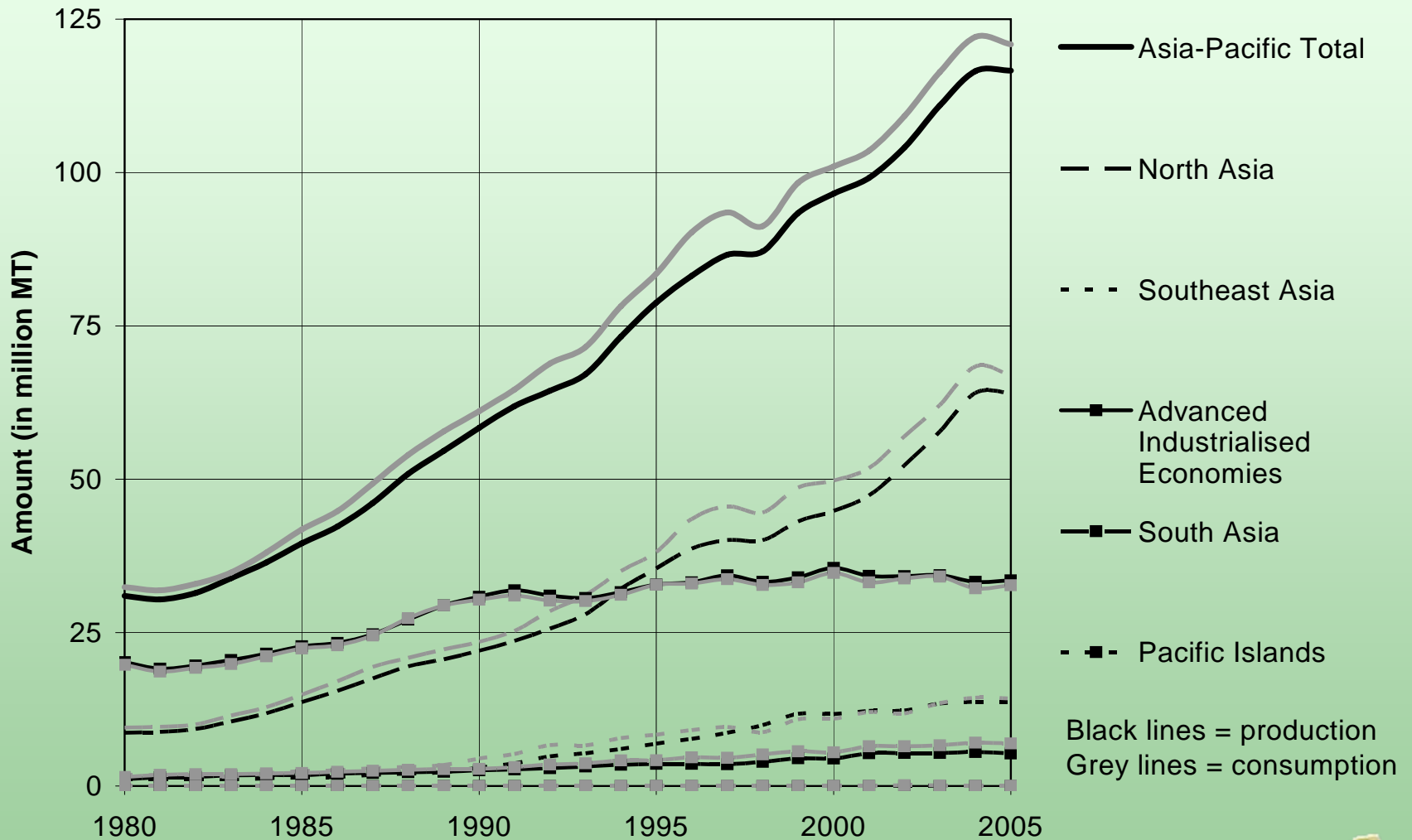


Historical trends: fibre furnish



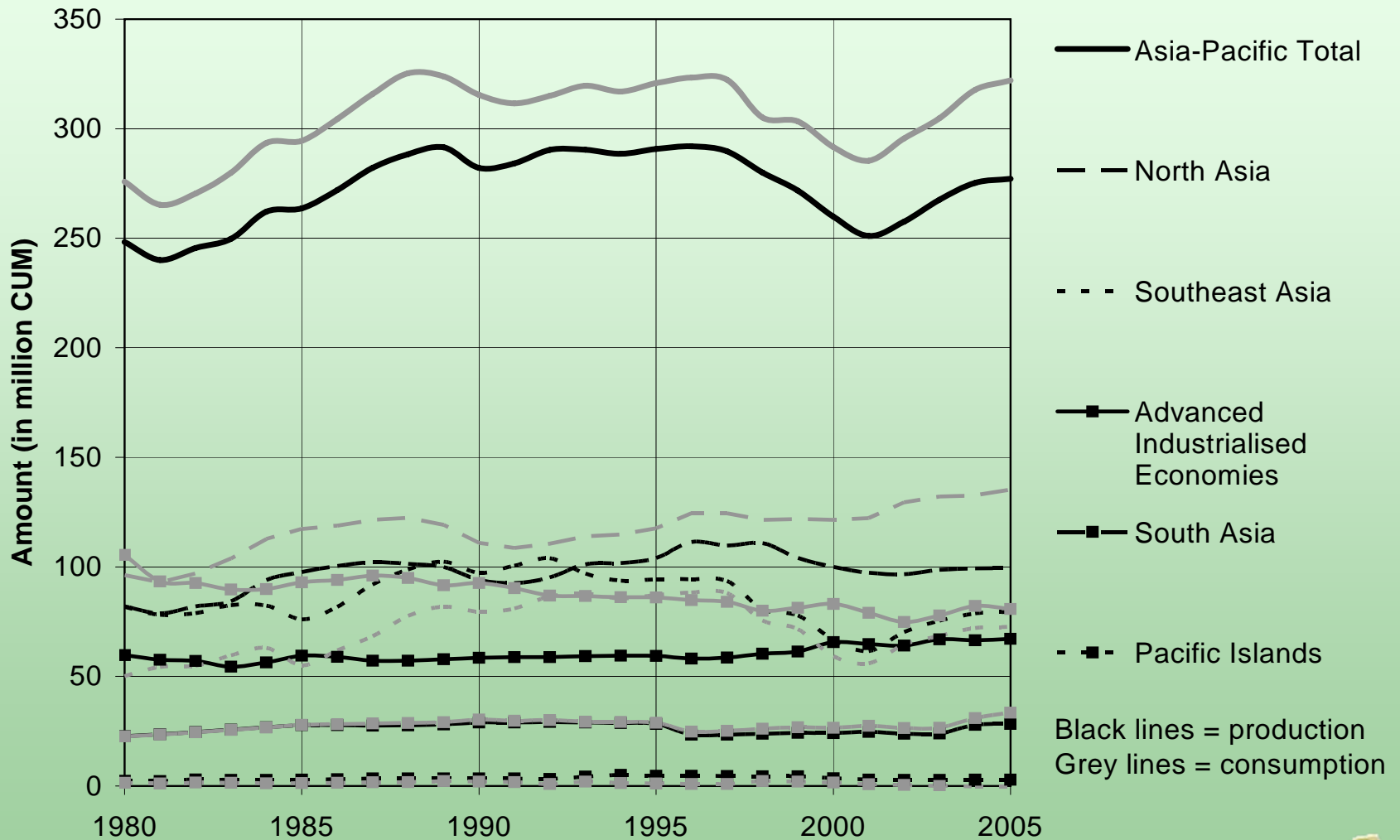


Historical trends: paper and paperboard



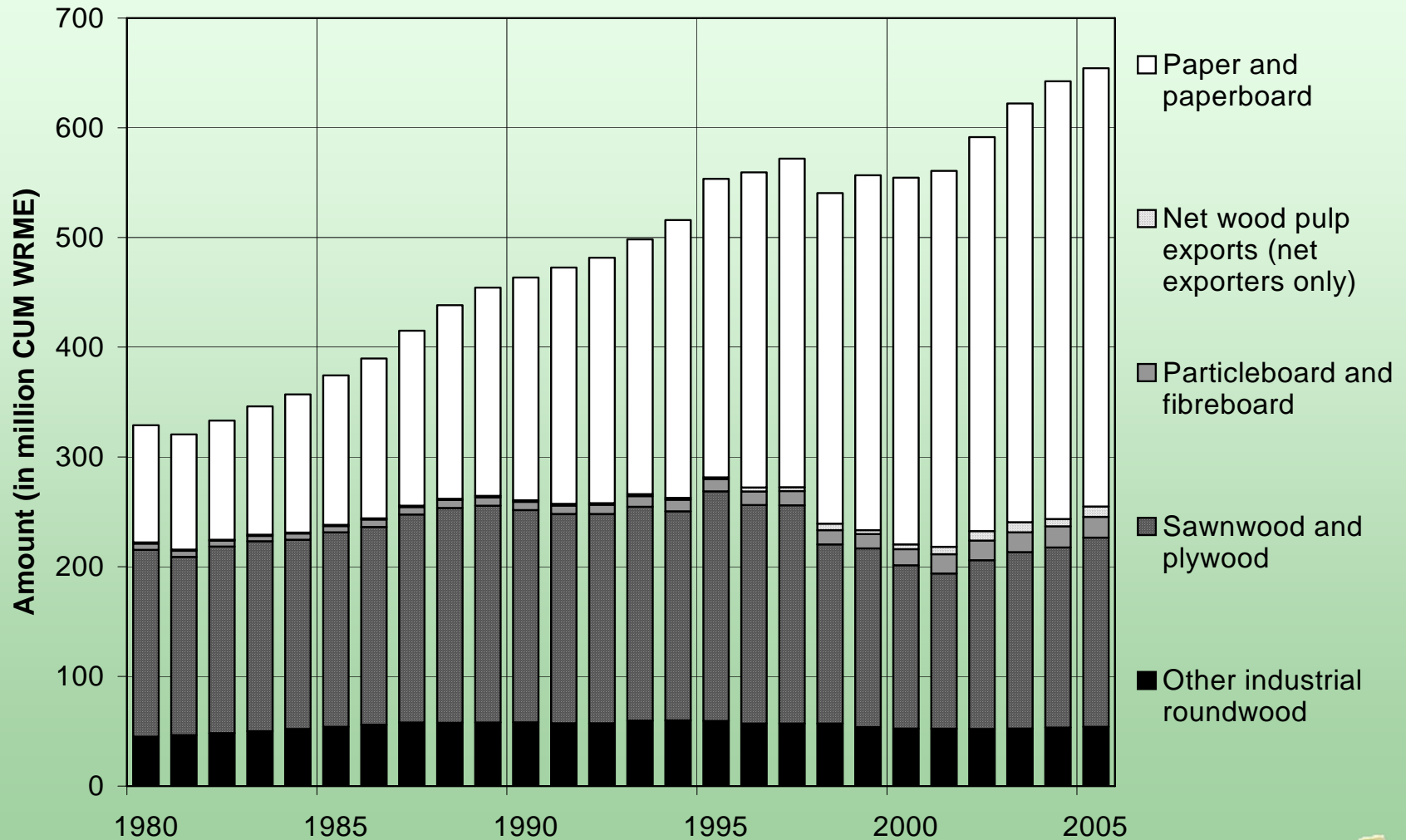


Historical trends: industrial roundwood



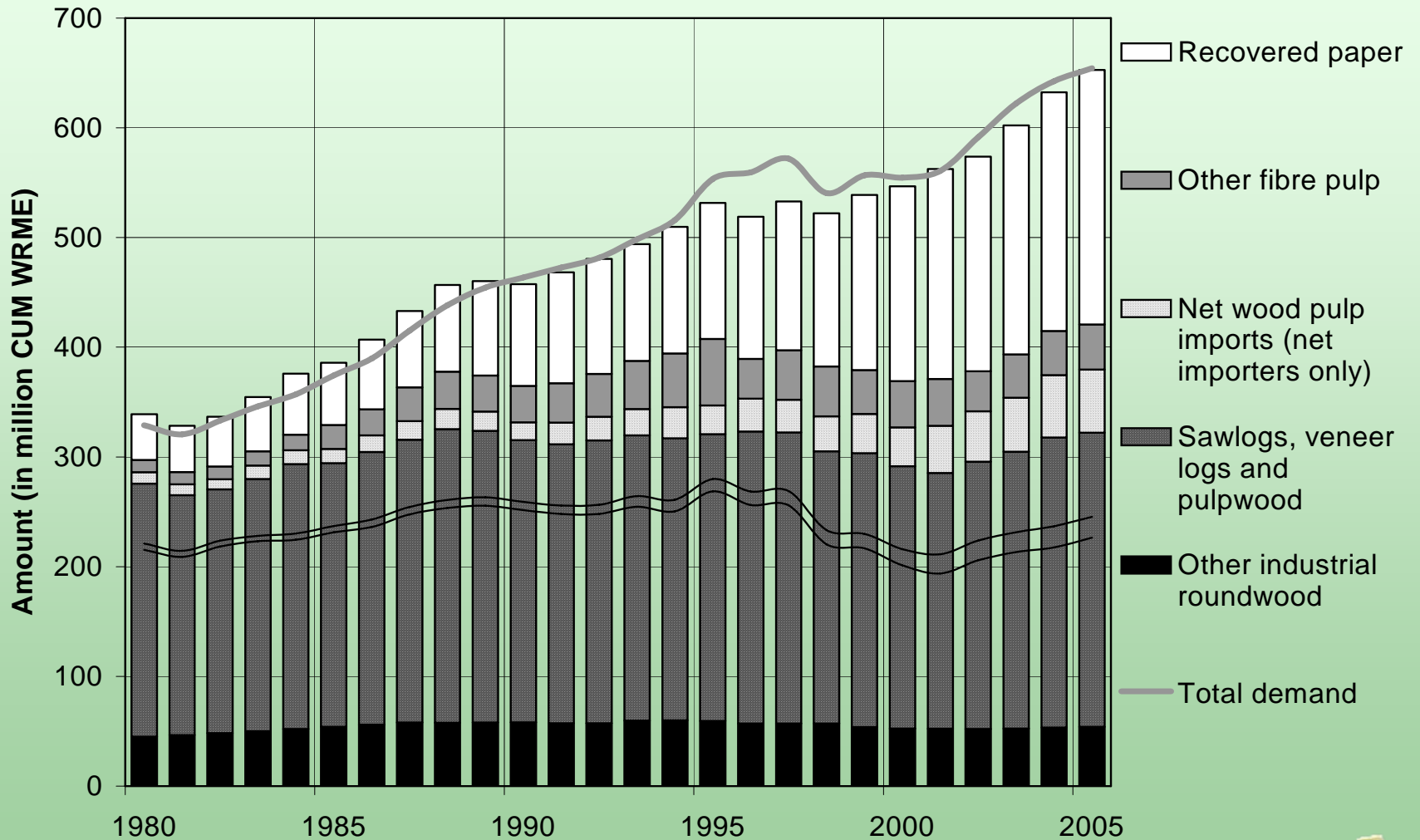


Wood raw material demand by industry



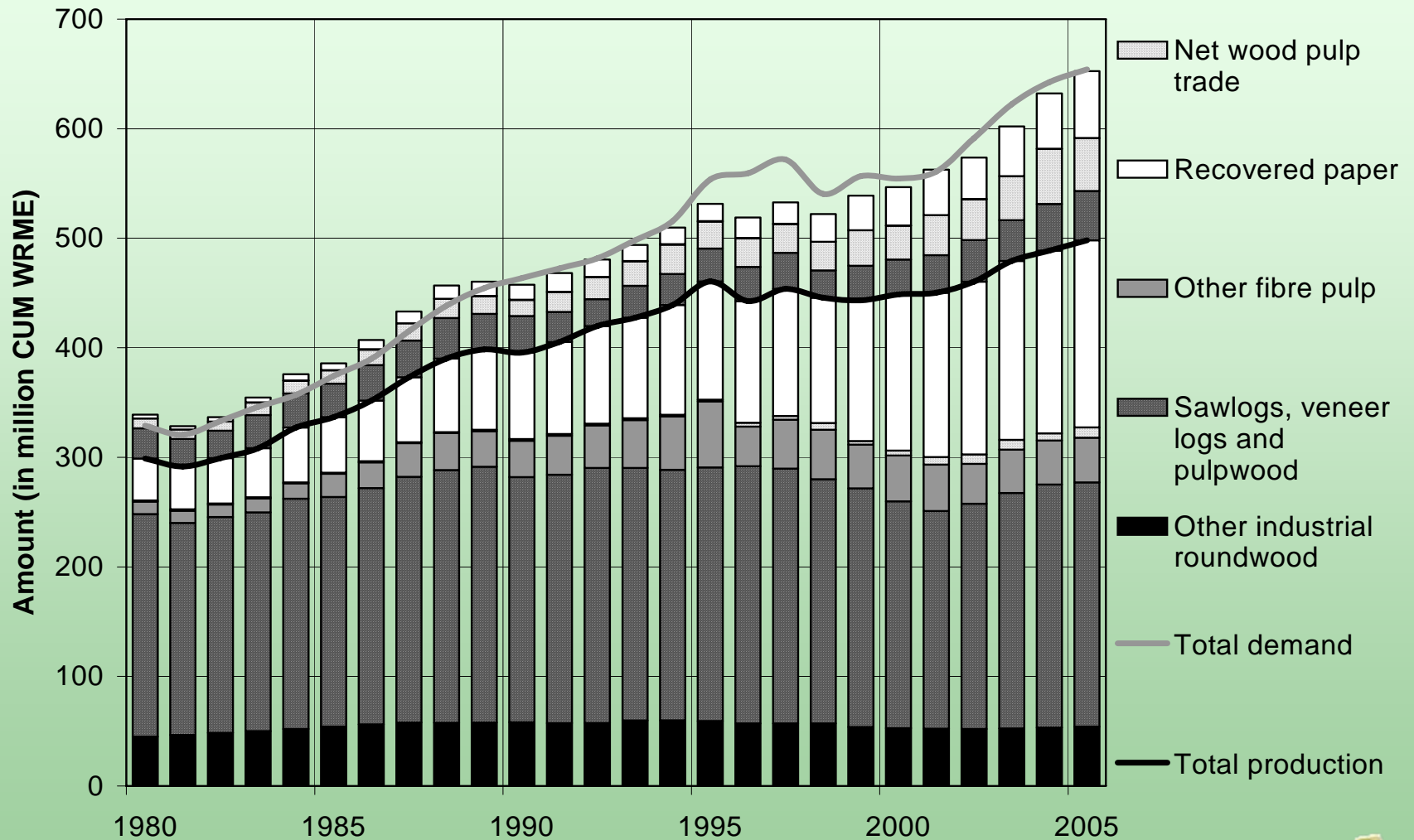


Wood raw material consumption by source





Wood raw material consumption by source





Some observations

1. Compared to previous forecasts:

- Particleboard, fibreboard, pulp and paper growth higher.
- Sawnwood and plywood growth lower.
- China growth higher; Japan growth lower.
- International trade higher.

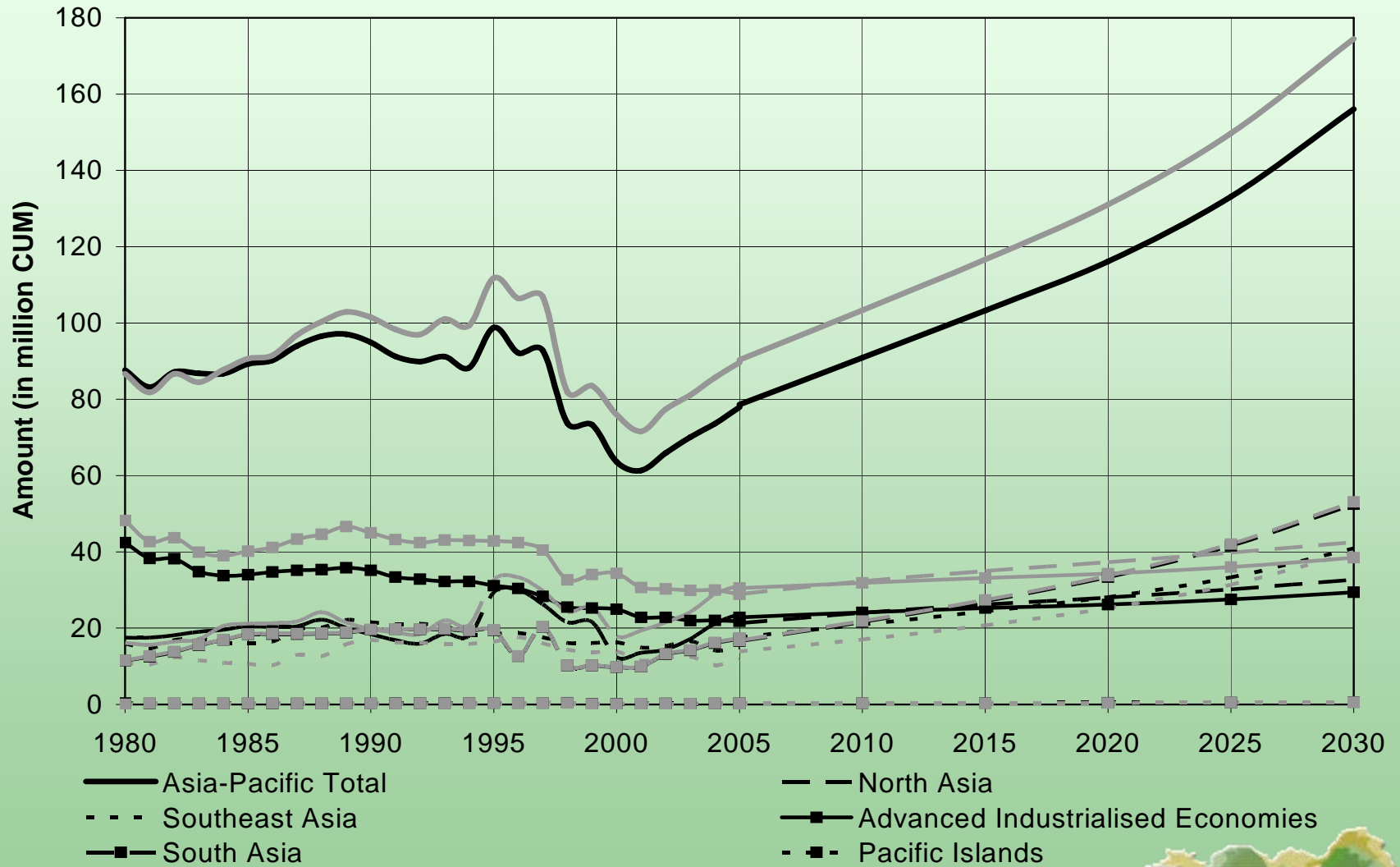
2. At the global level, international trade has increased more than expected and AP region has captured global market share.

3. Widely different circumstances in the region still significant scope for efficiency gains



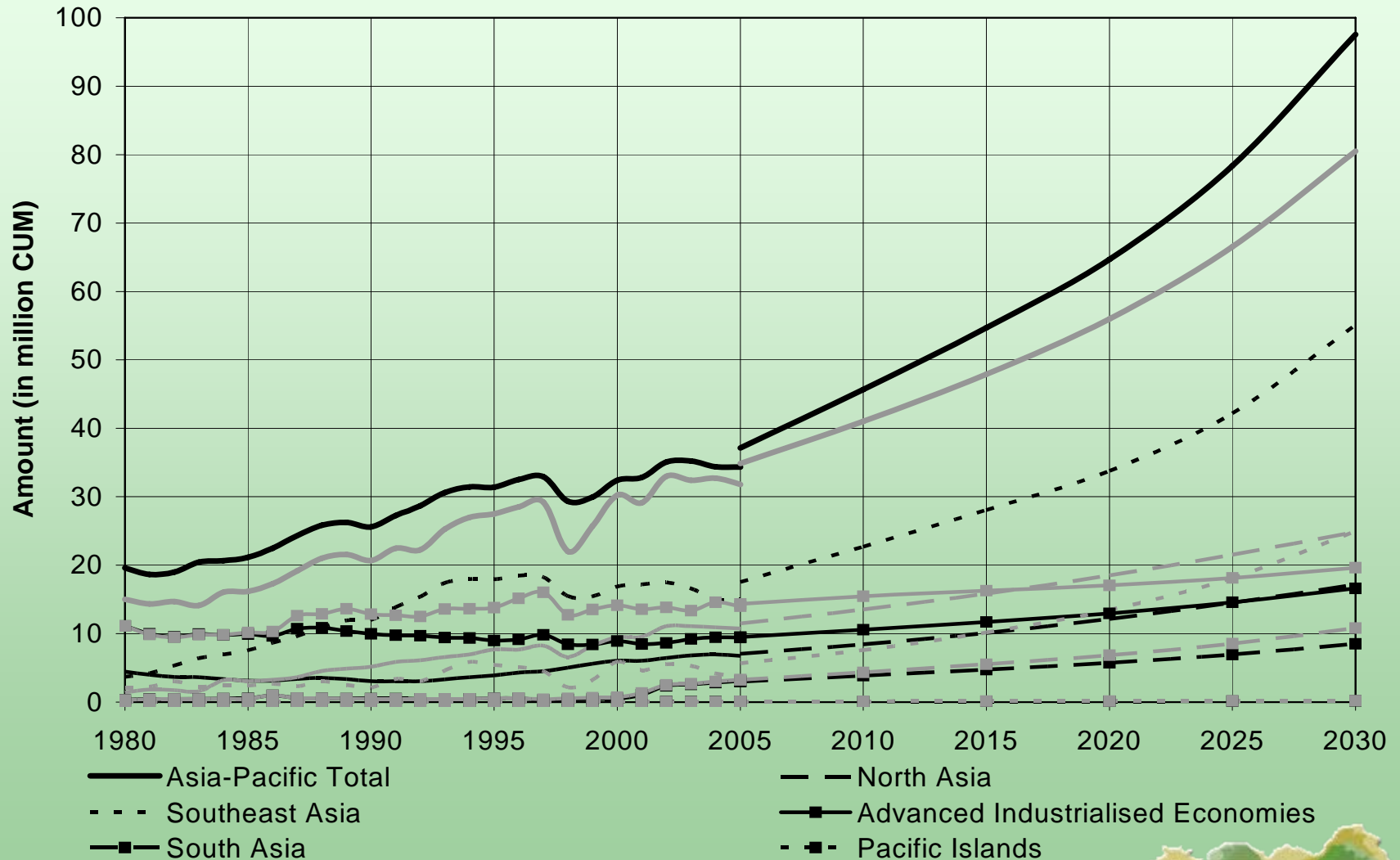


Outlook: sawnwood



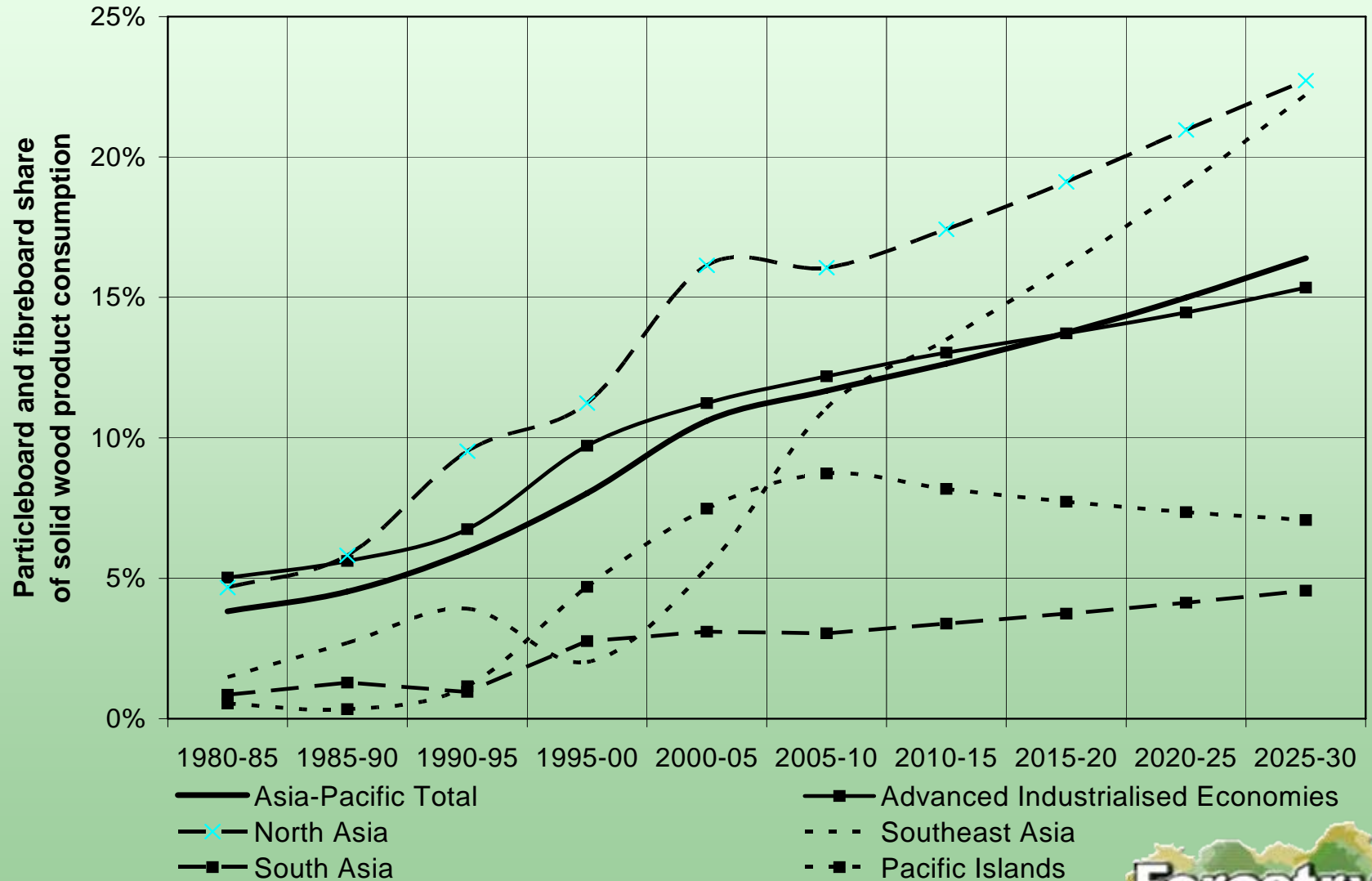


Outlook: wood-based panels



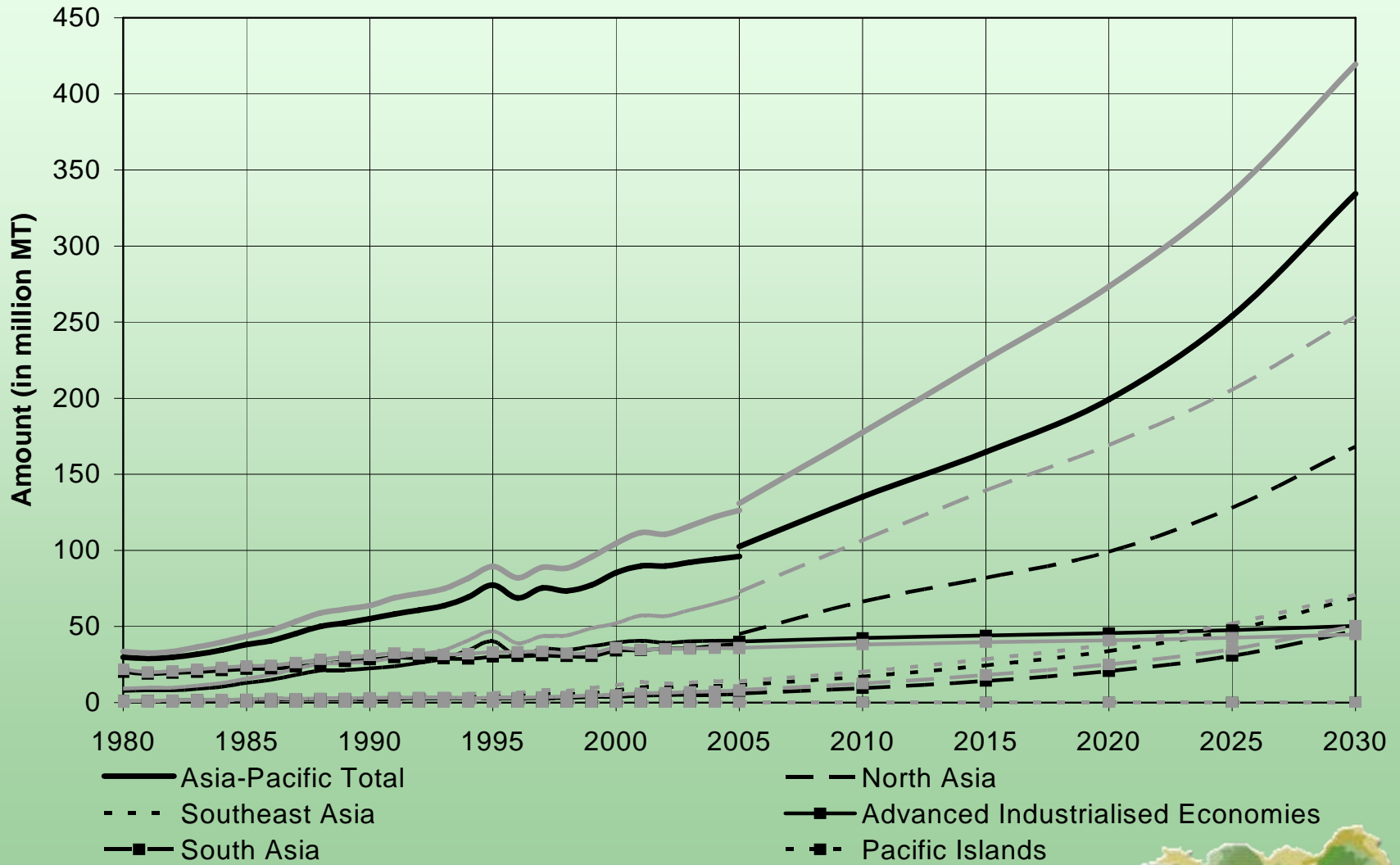


Structural change: reconstituted panels



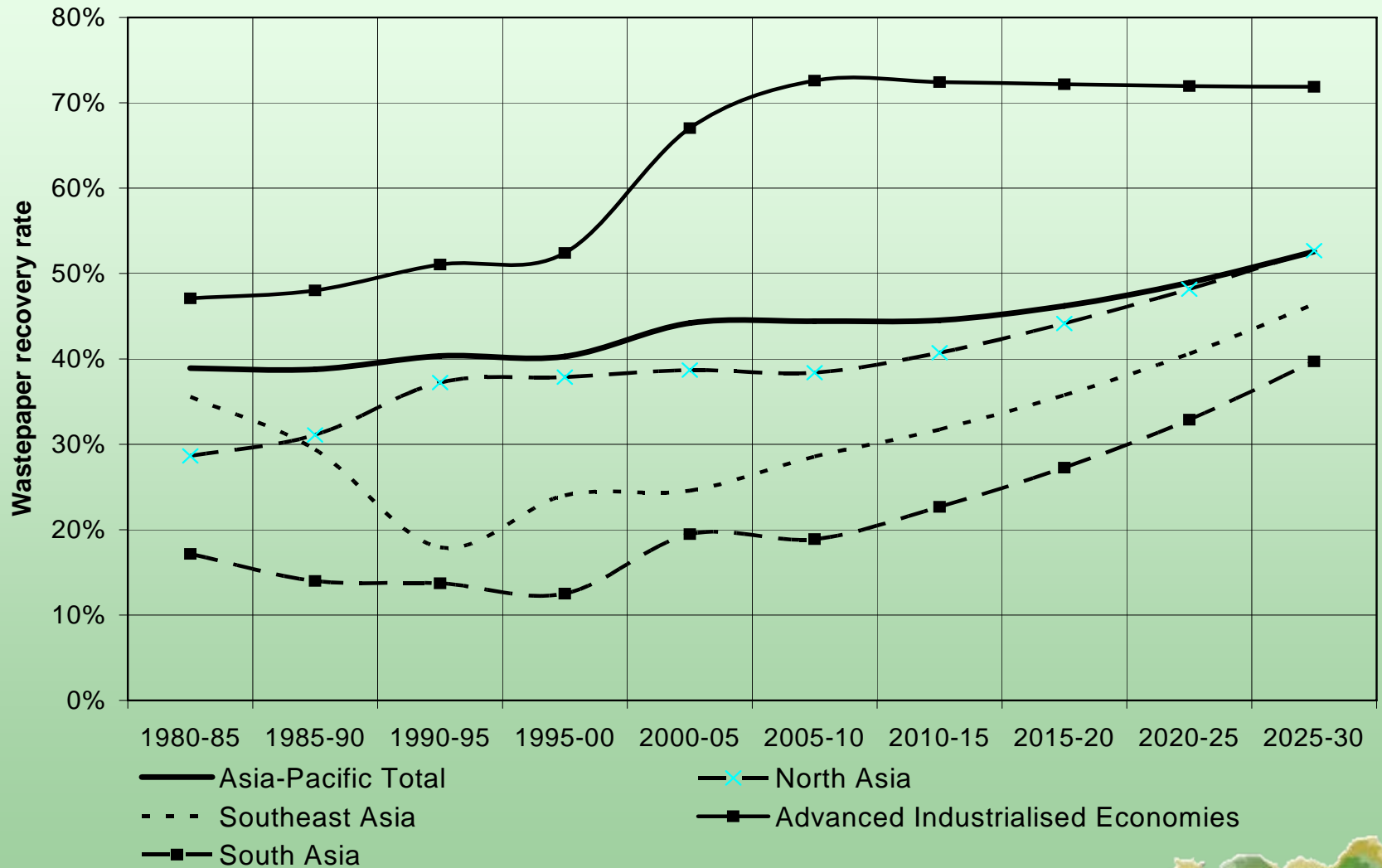


Outlook: fibre furnish



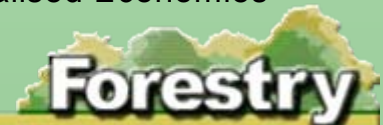
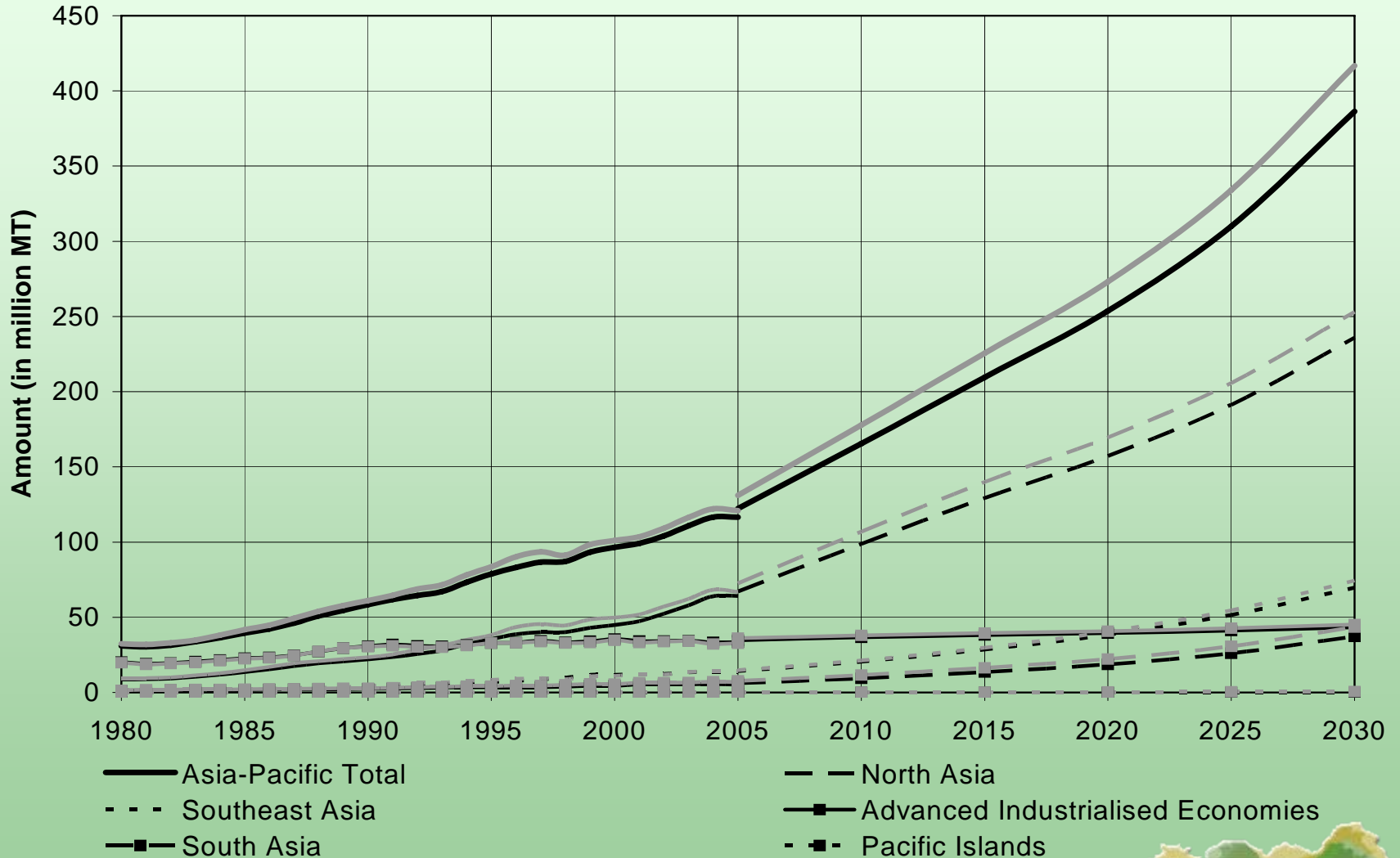


Outlook: wastepaper recovery



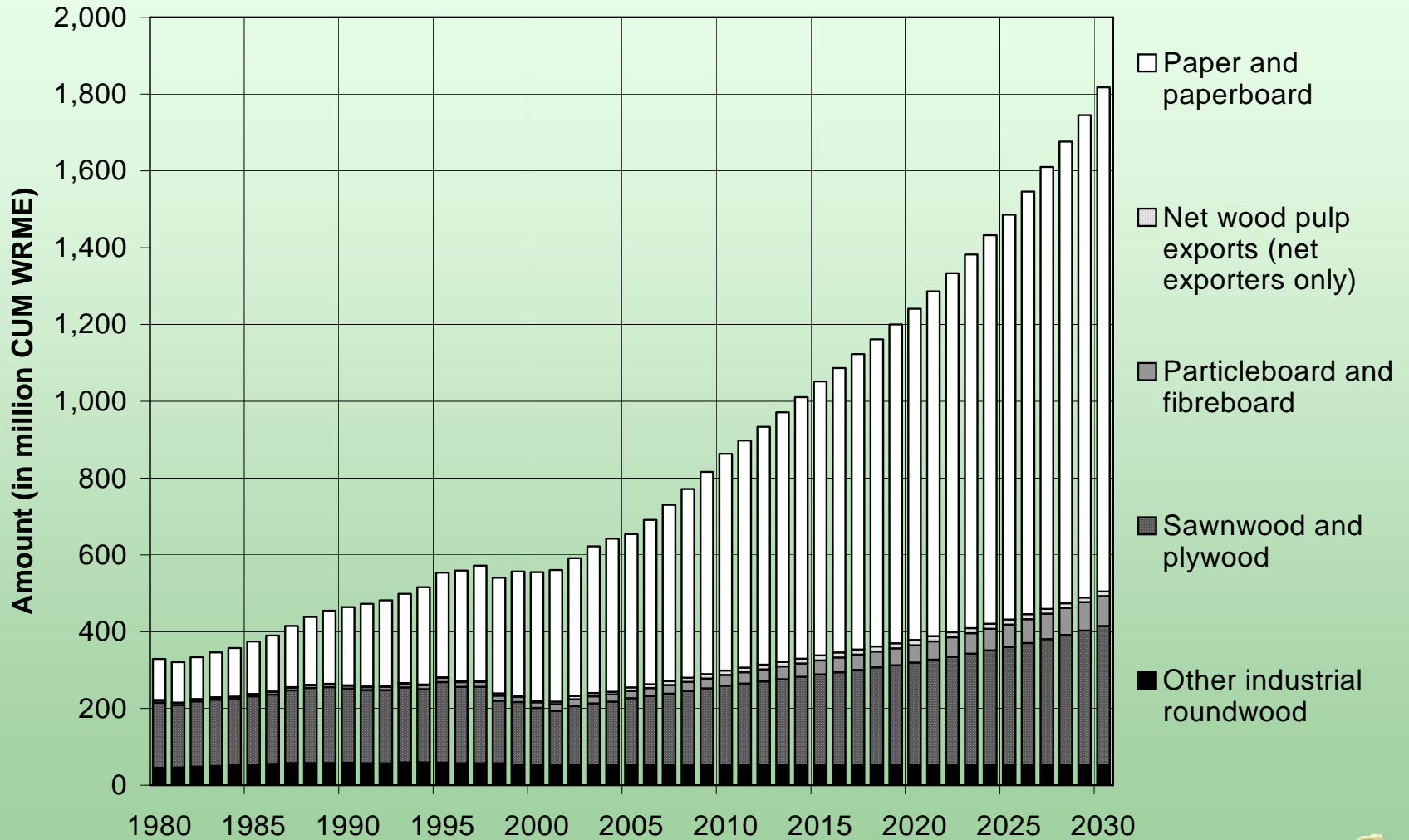


Outlook: paper and paperboard



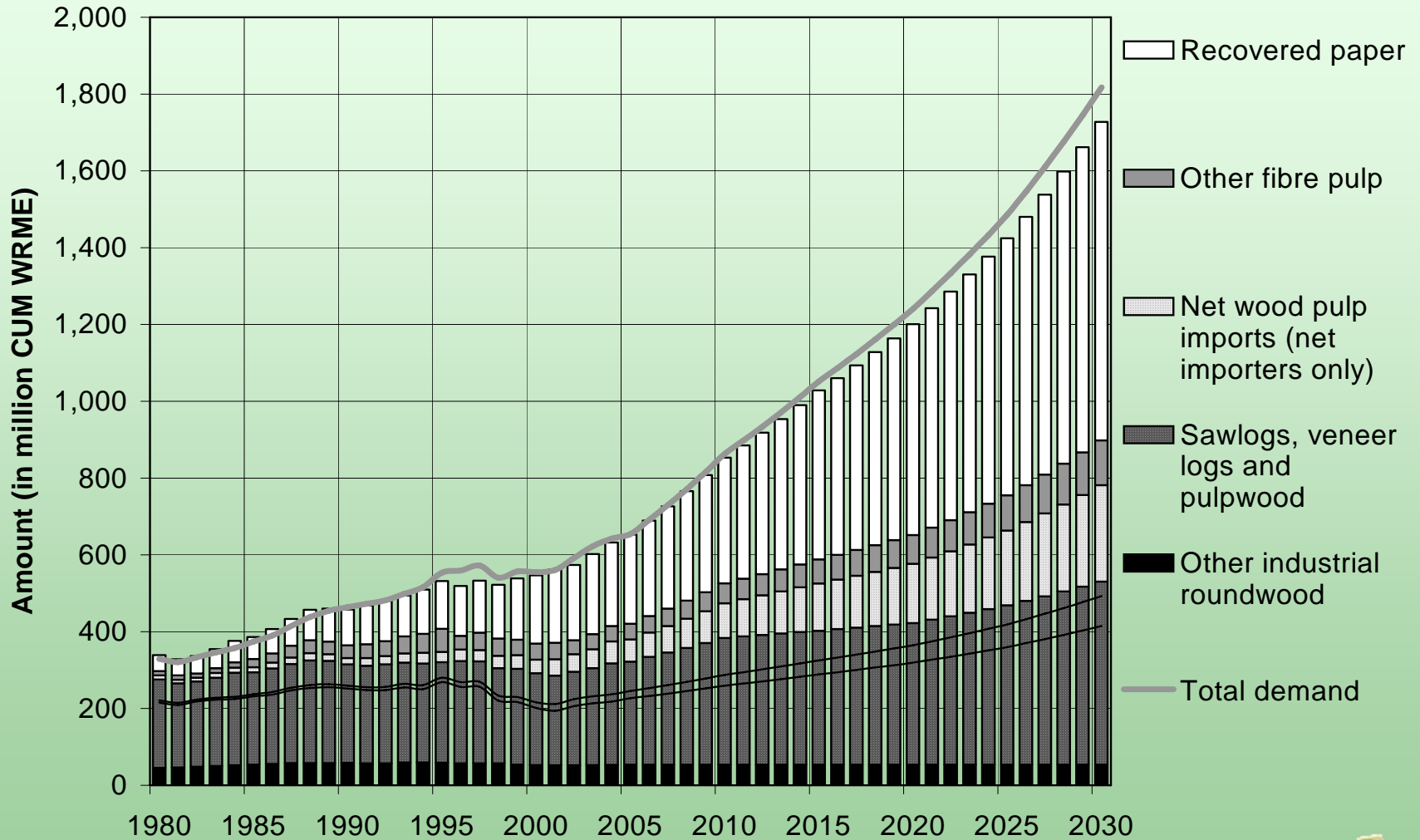


Outlook: wood raw material demand



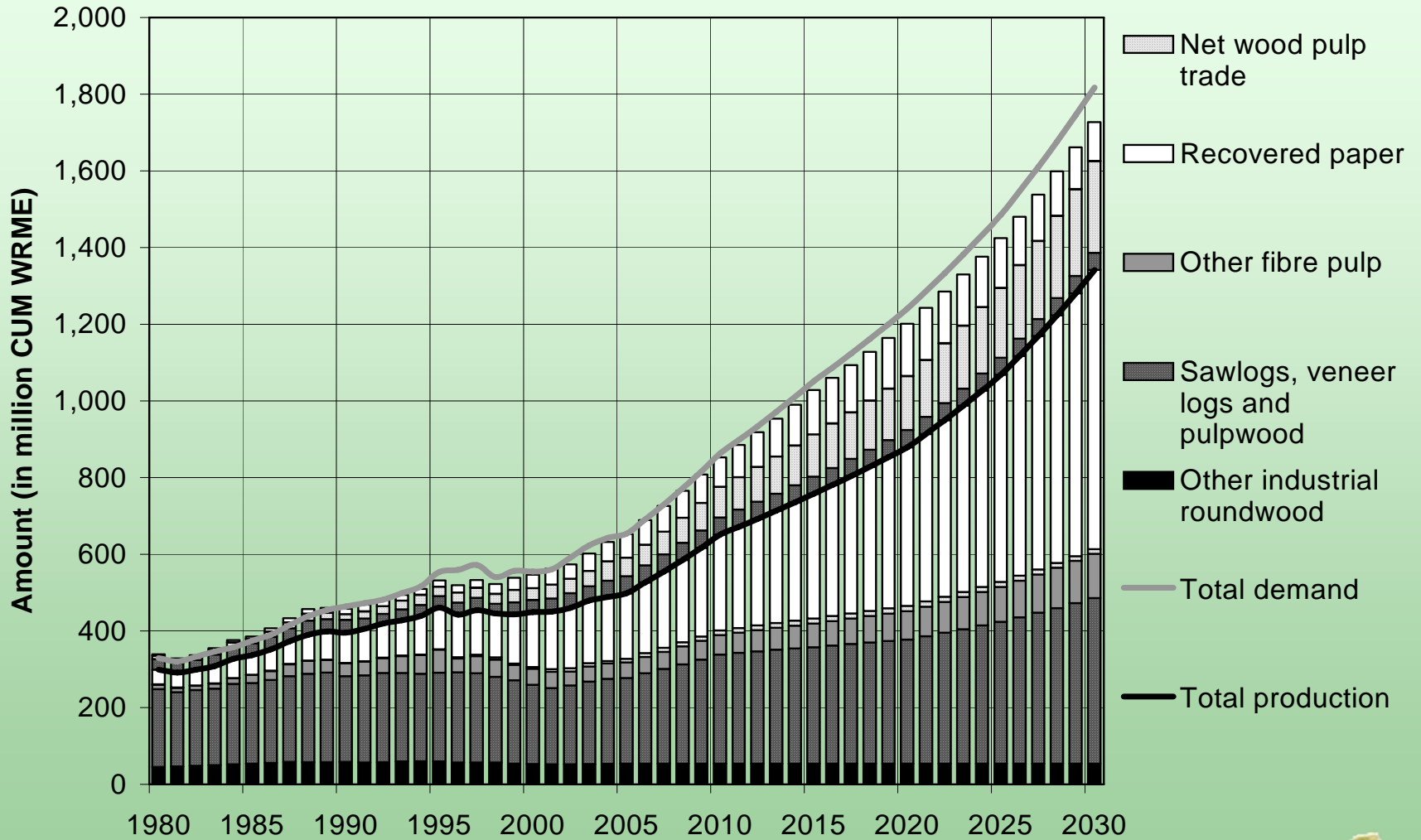


Outlook: wood raw material consumption





Outlook: wood raw material consumption





Implications of the outlook for forests

(Amounts in million CUM)		2005	2010	2015	2020	2025	2030
Sawlog and pulpwood demand	<i>Sawlogs</i>	172	205	235	265	306	361
	<i>Pulpwood</i>	51	79	69	58	64	71
	Total	223	284	303	323	370	432
Production from natural forests	<i>Sawlogs</i>	128	128	128	128	128	128
	<i>Pulpwood</i>	10	10	10	10	10	10
	Total	138	138	138	138	138	138
Production from forest plantations	<i>Sawlogs</i>	45	78	107	138	178	233
	<i>Pulpwood</i>	41	69	59	48	54	61
	Total	86	147	166	186	232	294
Forest plantation availability: Scenario 1	<i>Sawlogs</i>	45	58	60	64	64	63
	<i>Pulpwood</i>	134	173	181	193	192	190
	Total	179	230	241	257	255	254
Forest plantation availability: Scenario 2	<i>Sawlogs</i>	46	60	66	72	75	78
	<i>Pulpwood</i>	139	180	198	217	225	234
	Total	185	240	264	289	301	312
Forest plantation availability: Scenario 3	<i>Sawlogs</i>	50	71	89	110	121	133
	<i>Pulpwood</i>	150	214	266	331	364	400
	Total	200	285	355	441	485	533

