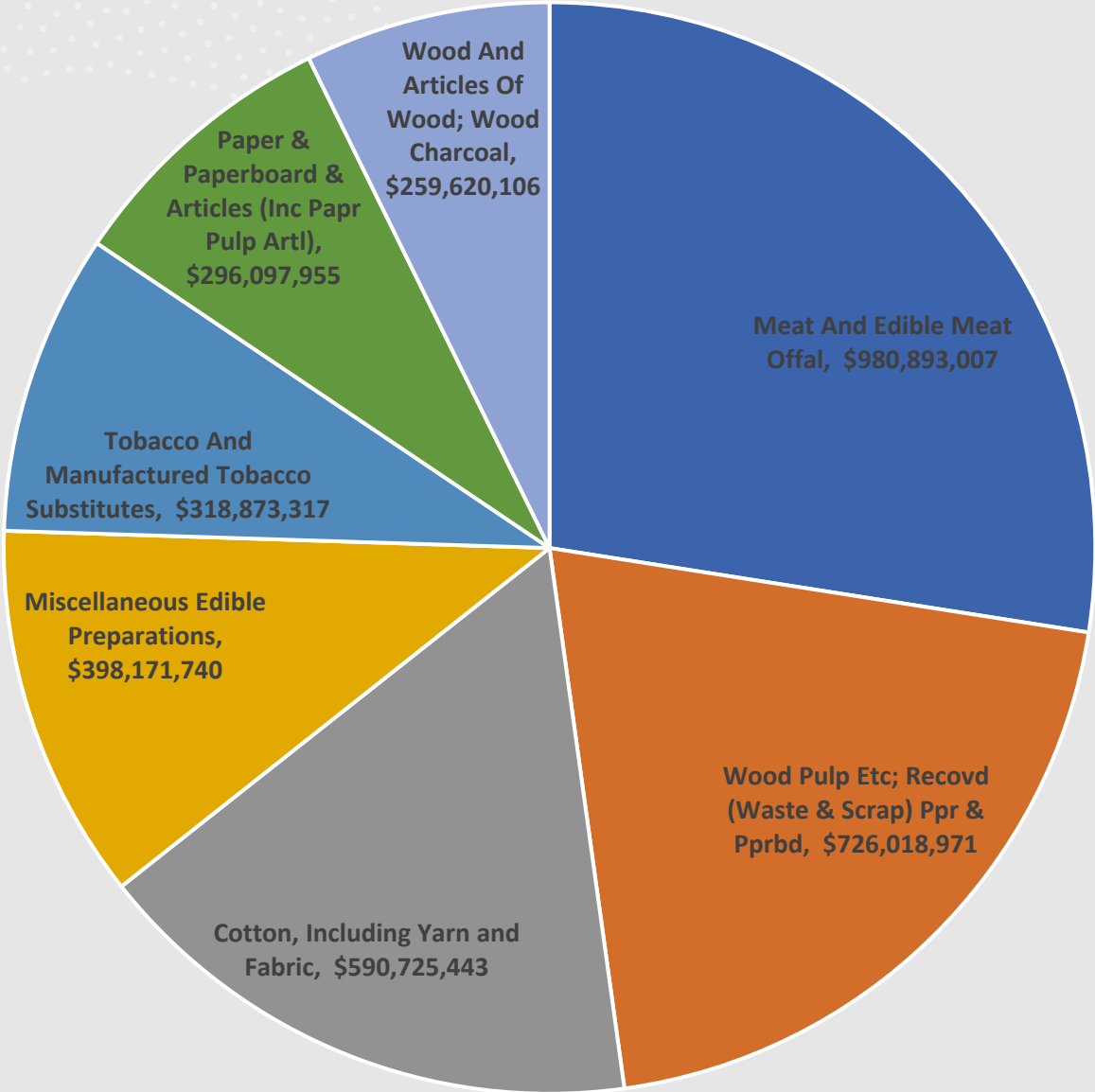


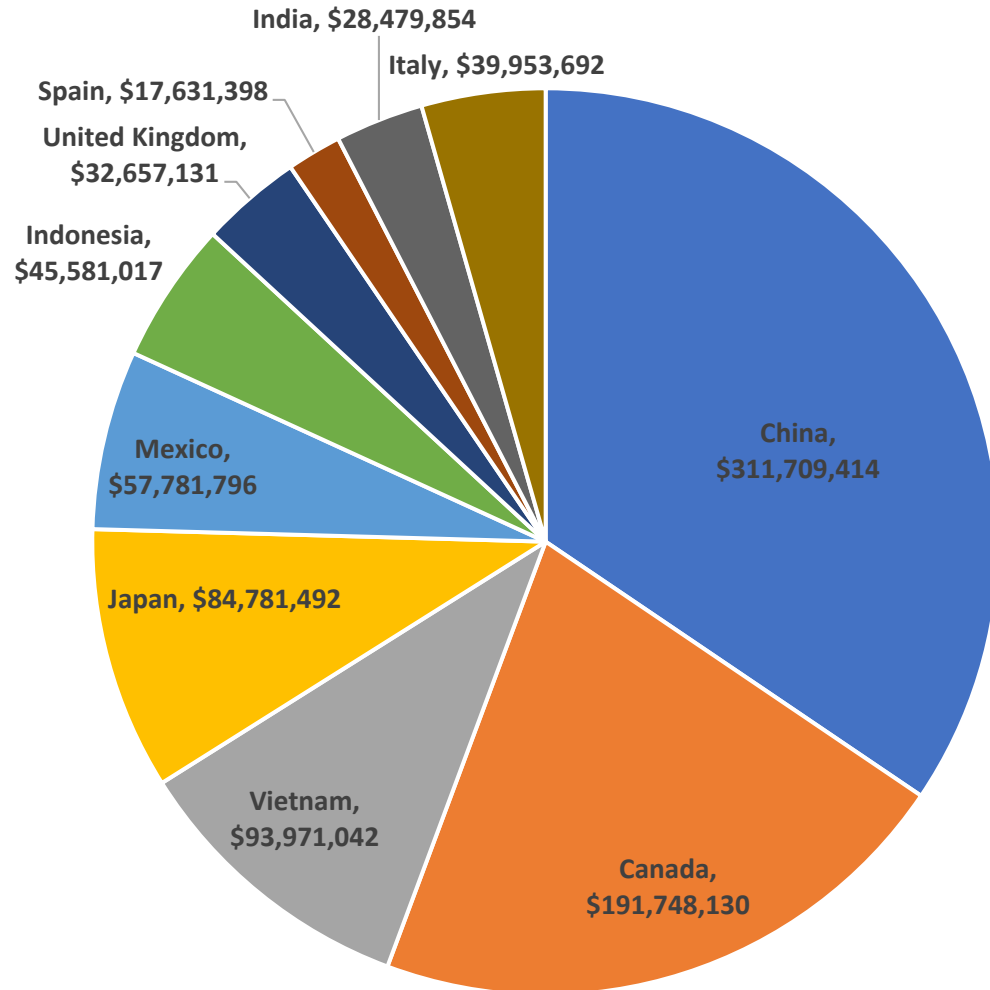
NC Forest Products Exports

Michelle Wang, International Marketing Specialist
North Carolina Department of Agriculture & Consumer Services

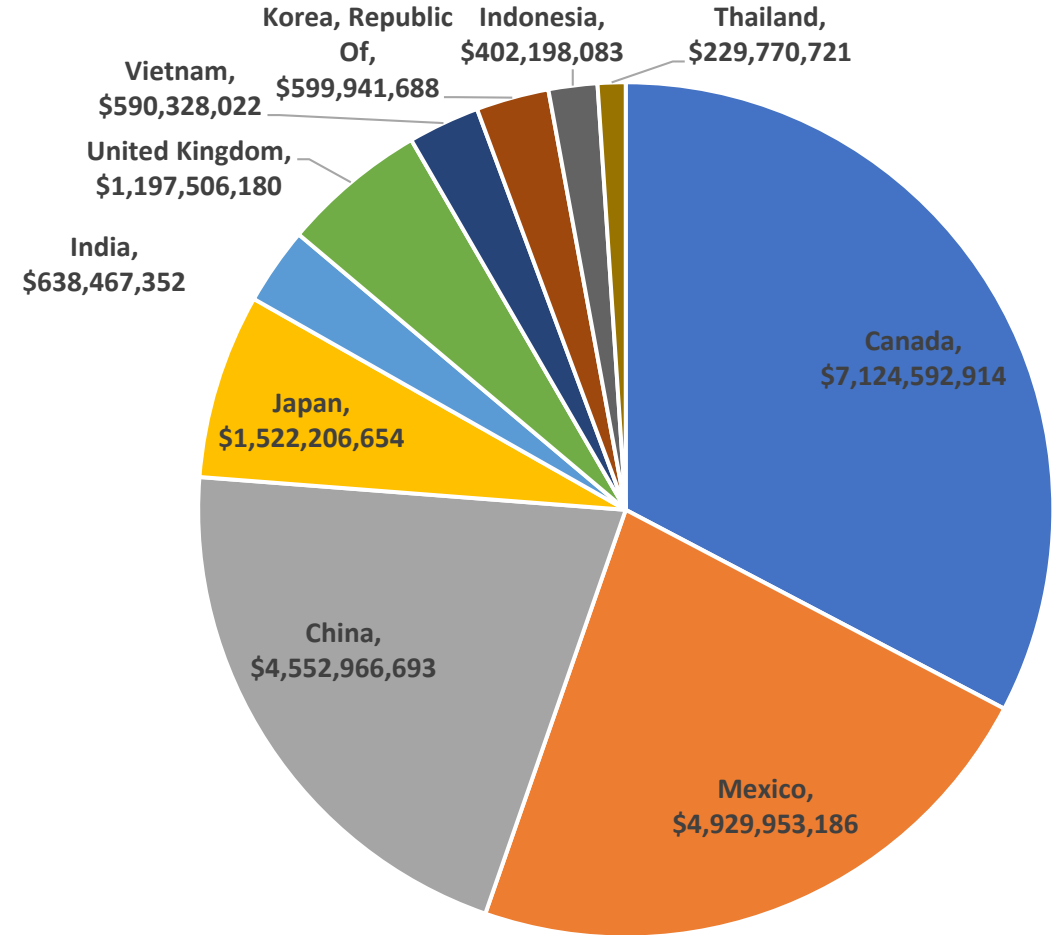
Top NC Ag Export Commodities in 2020



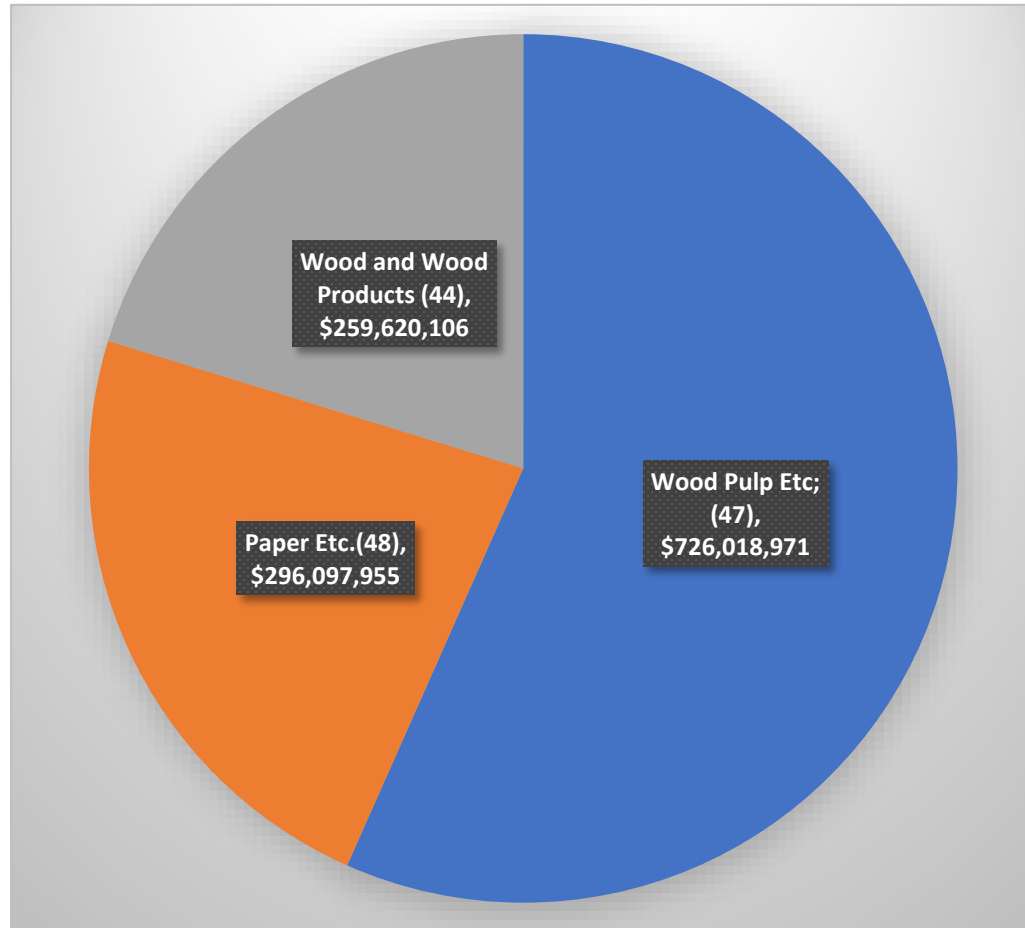
Top NC Forest Products Export Markets



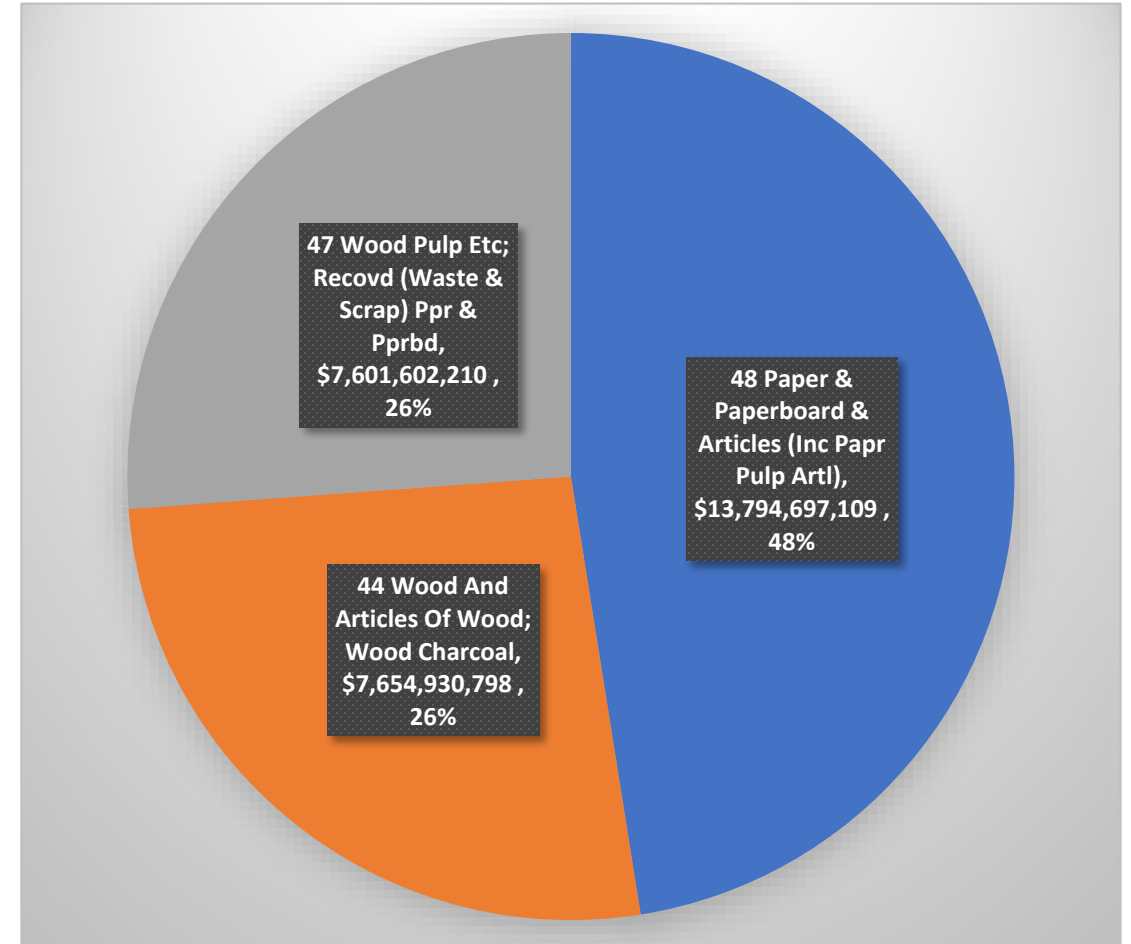
Top US Forest Products Export Markets



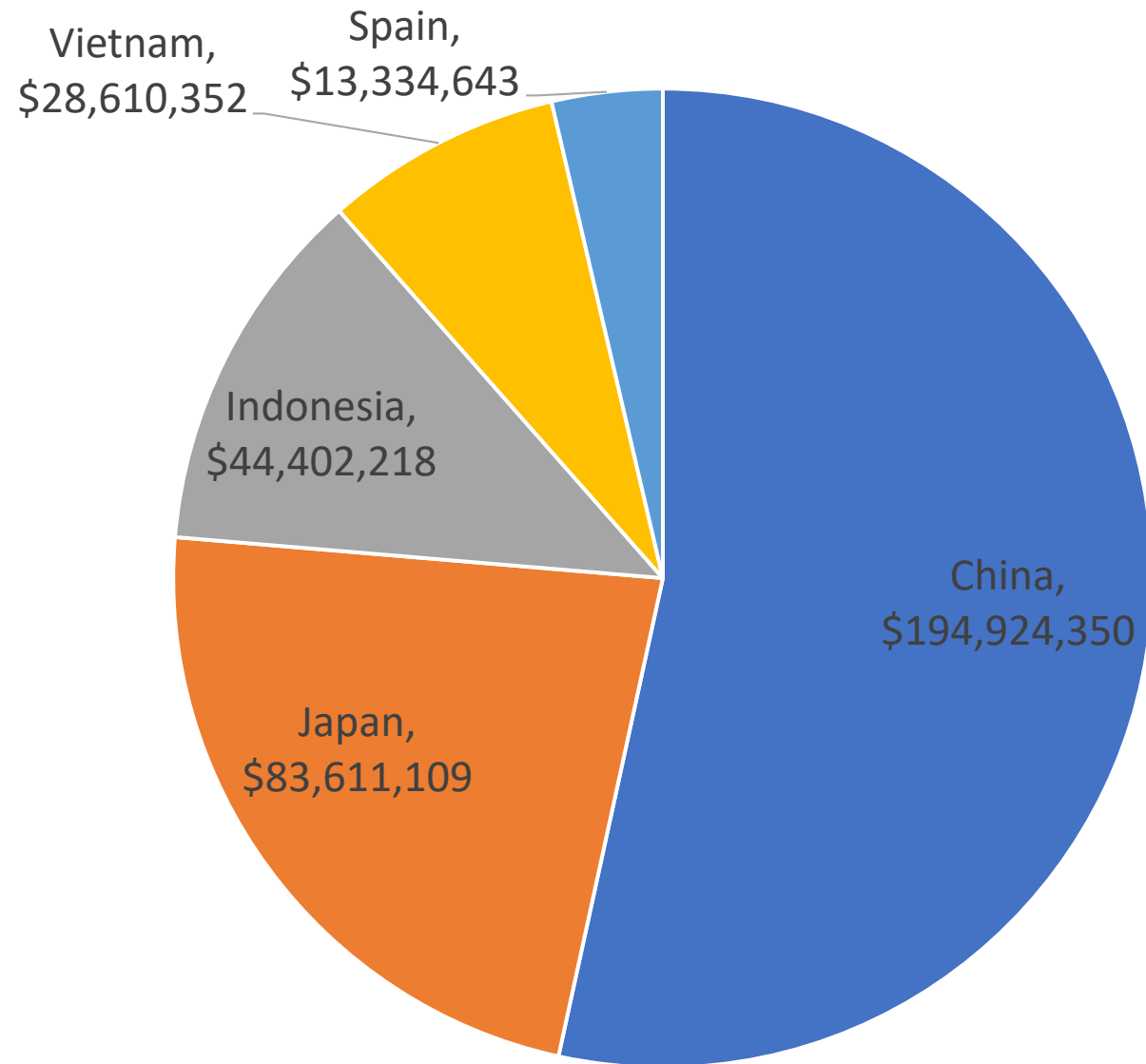
NC Forest Products Exports by Products in 2020



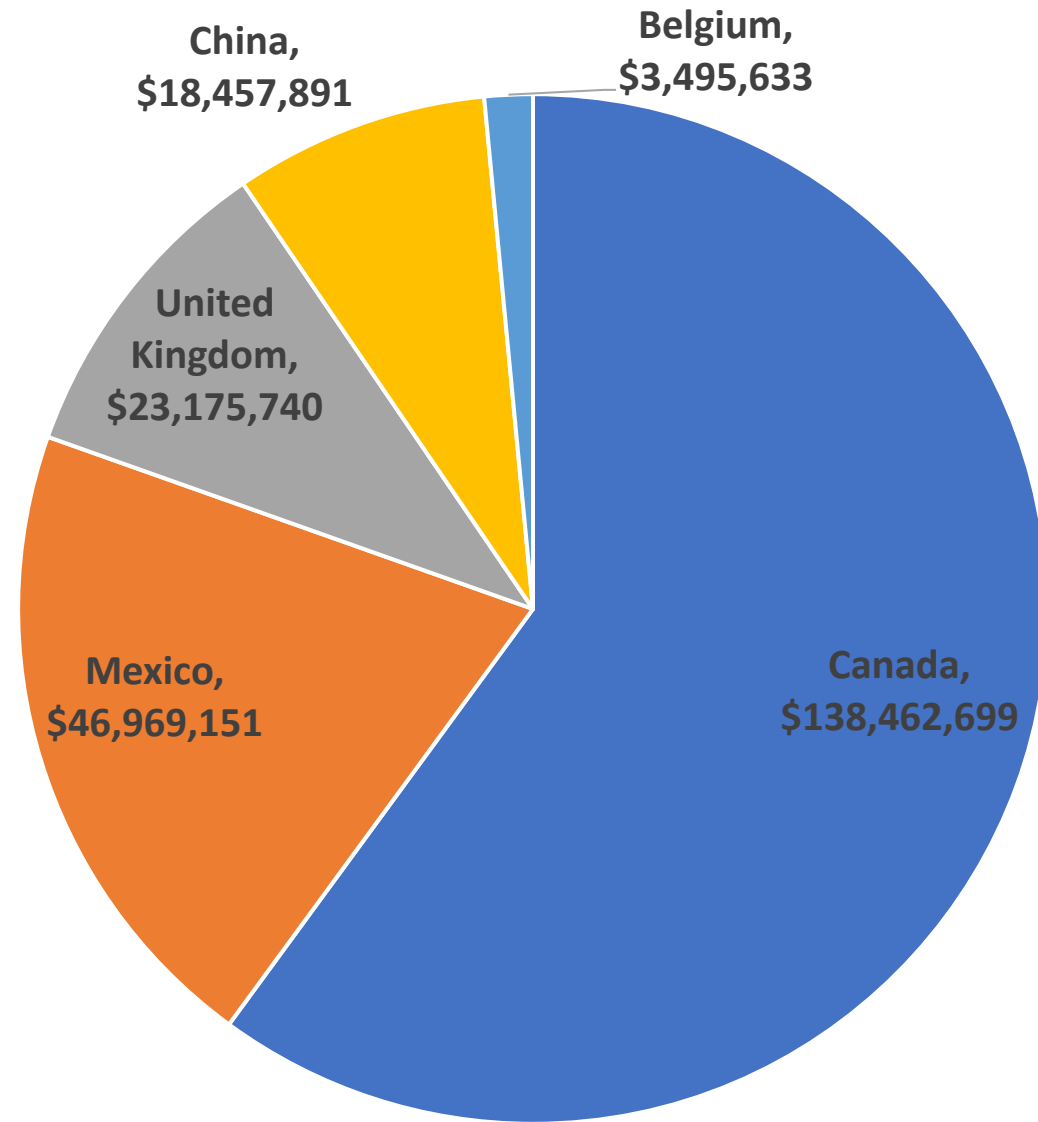
US Forest Products Exports by Products in 2020



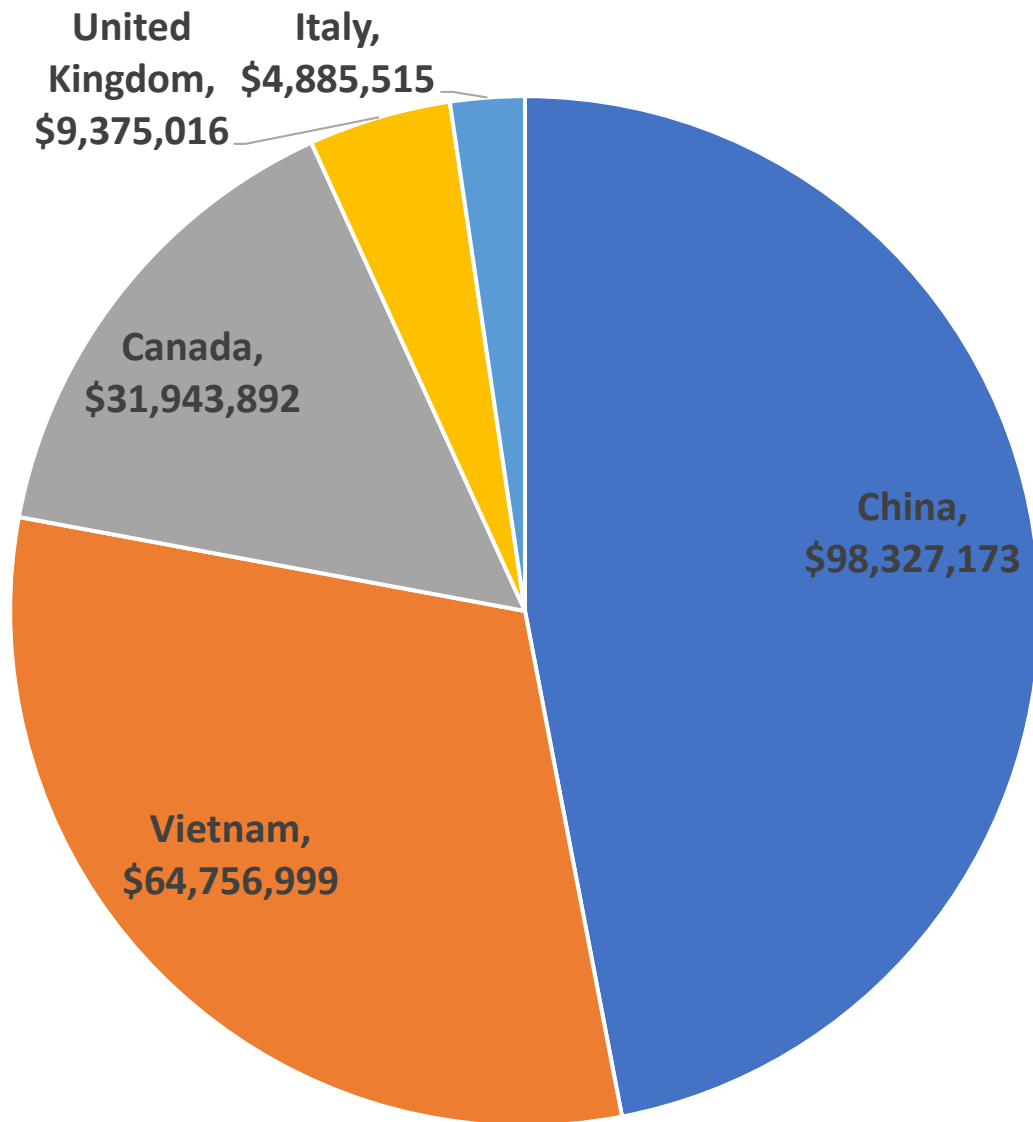
Top NC Wood Pulp Export Markets Markets 2020



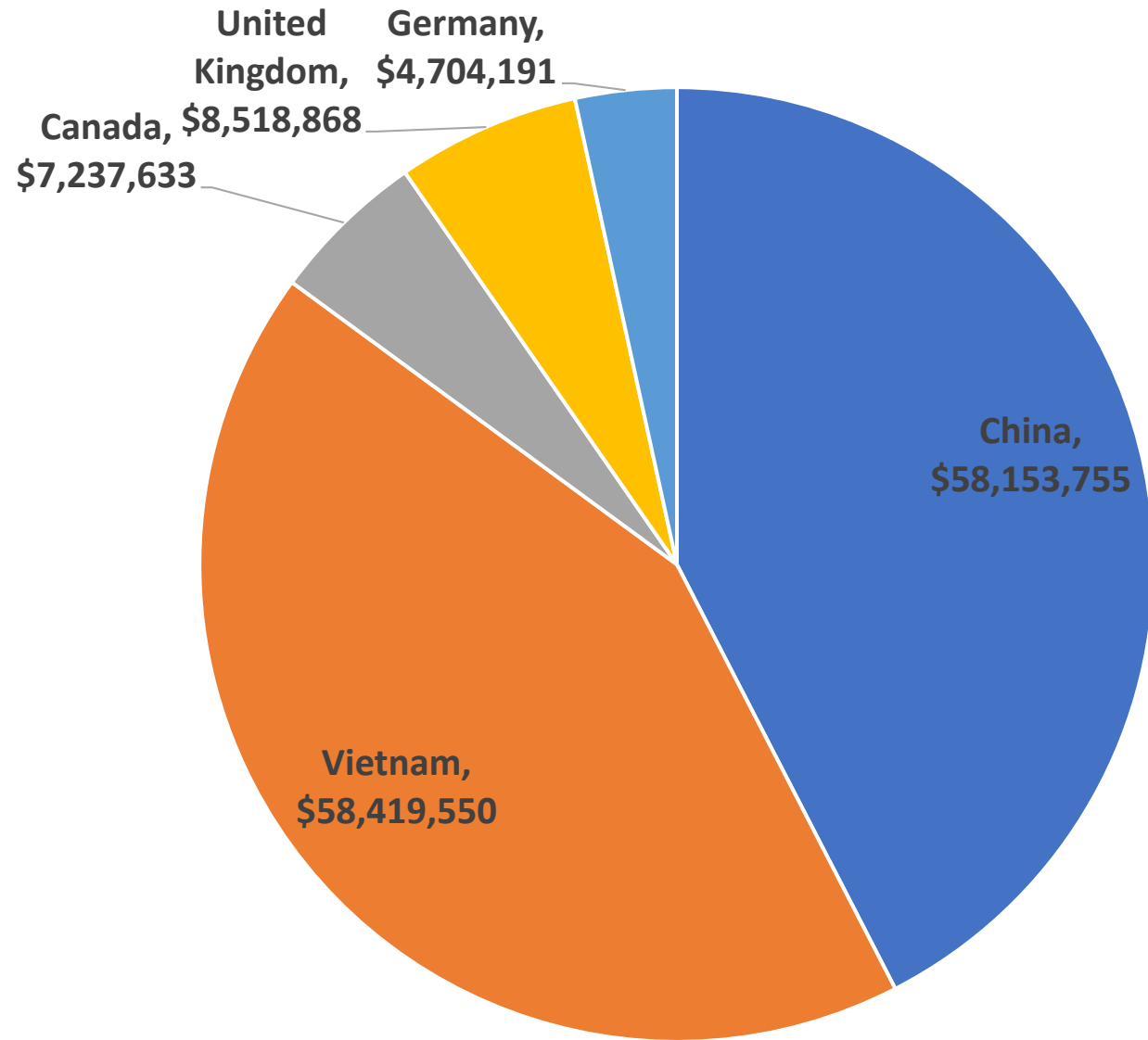
Top NC Paper & Paperboard Export Markets in 2020



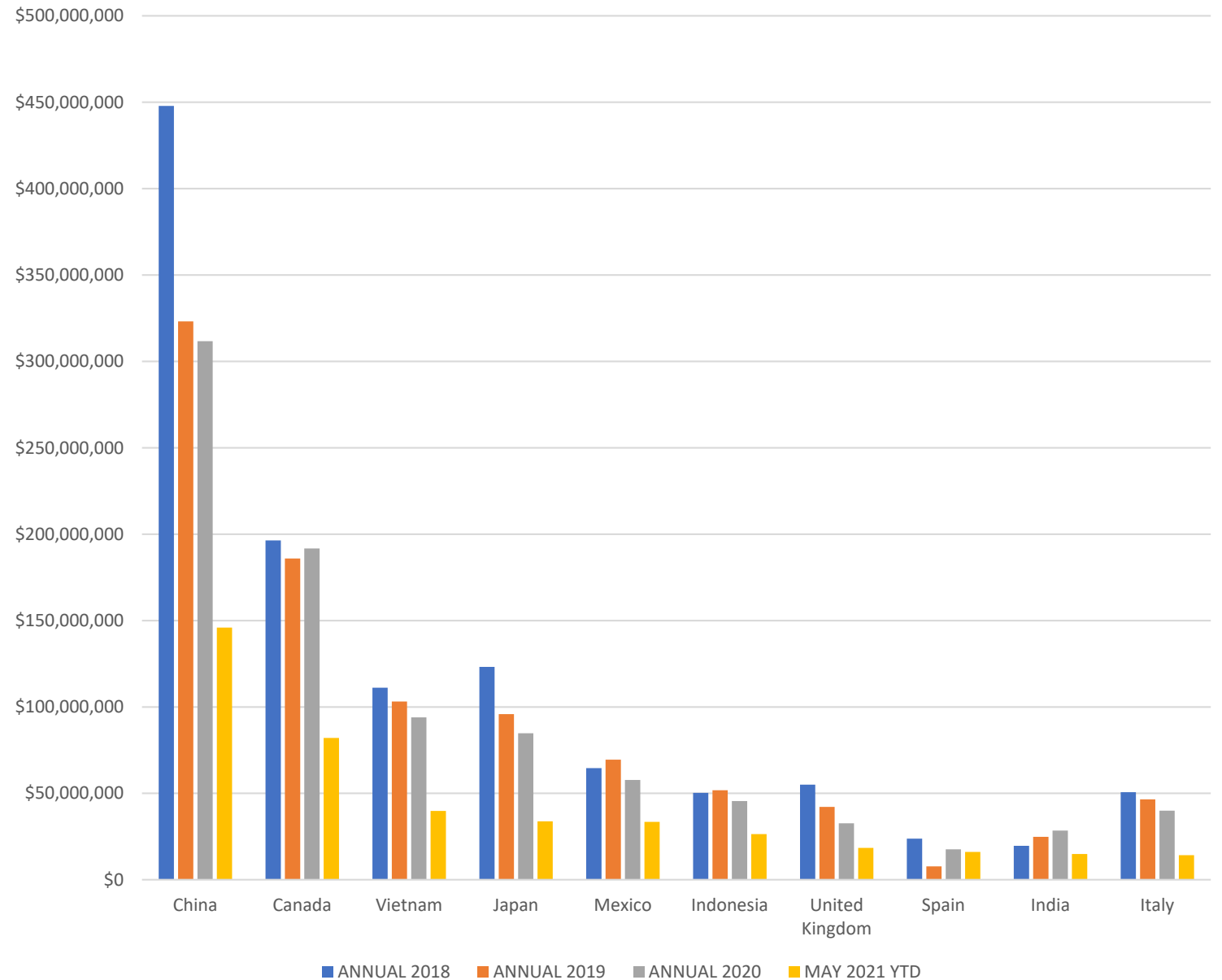
Top NC Wood & Wood Products Export Markets in 2020



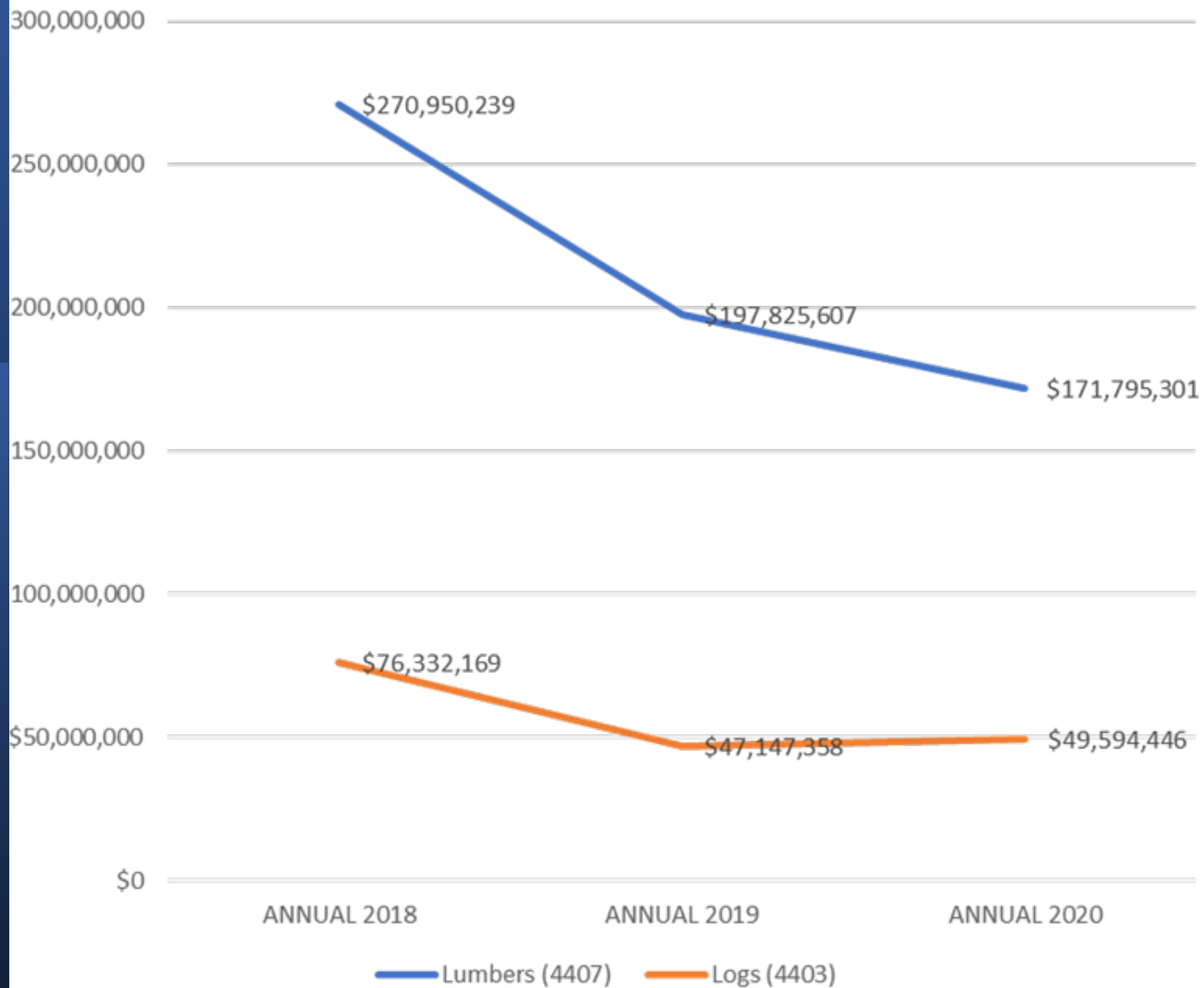
Top NC Lumber Export Markets in 2020



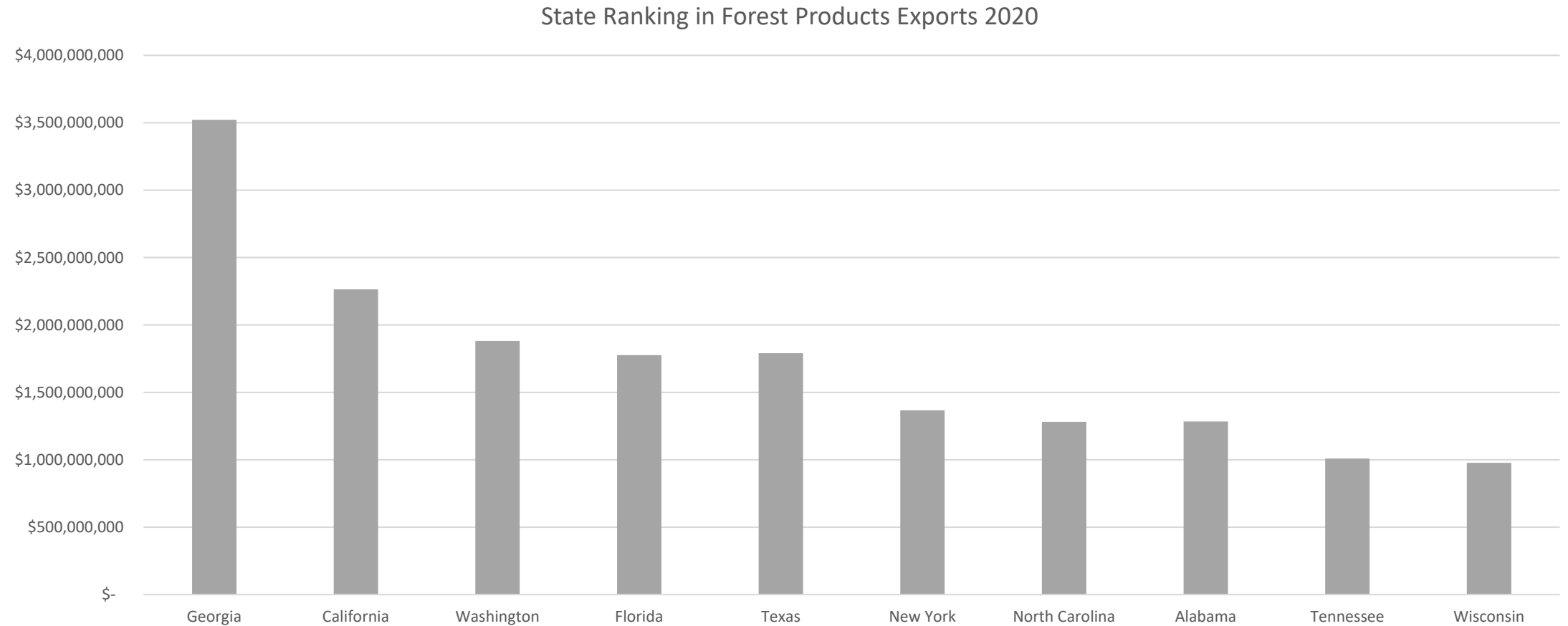
NC Wood Export Trends by Country, 2018-2020



NC Wood Export Trends by Products, 2018-2020

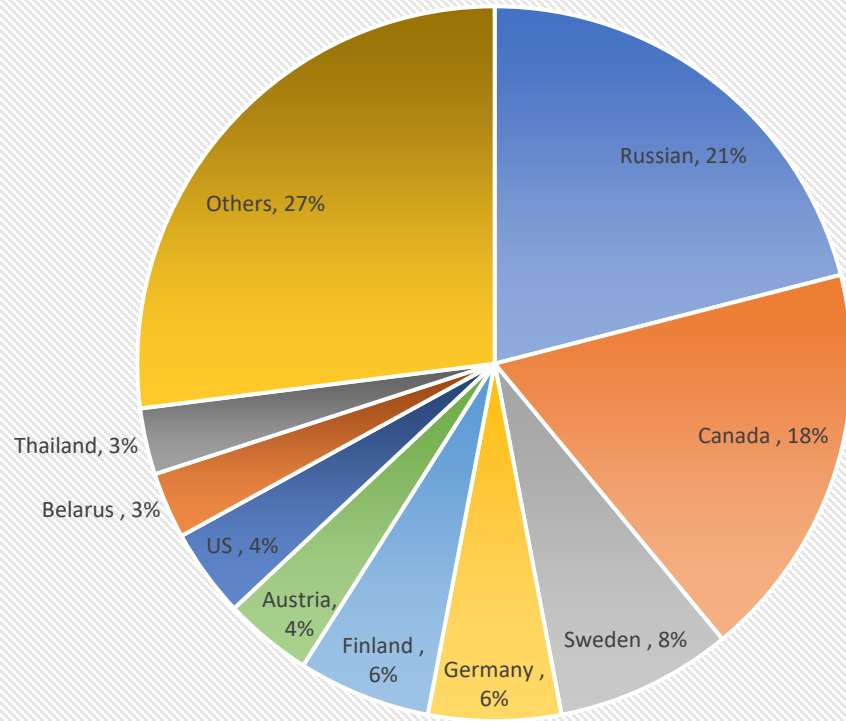


State Ranking in Forest Products Exports 2020

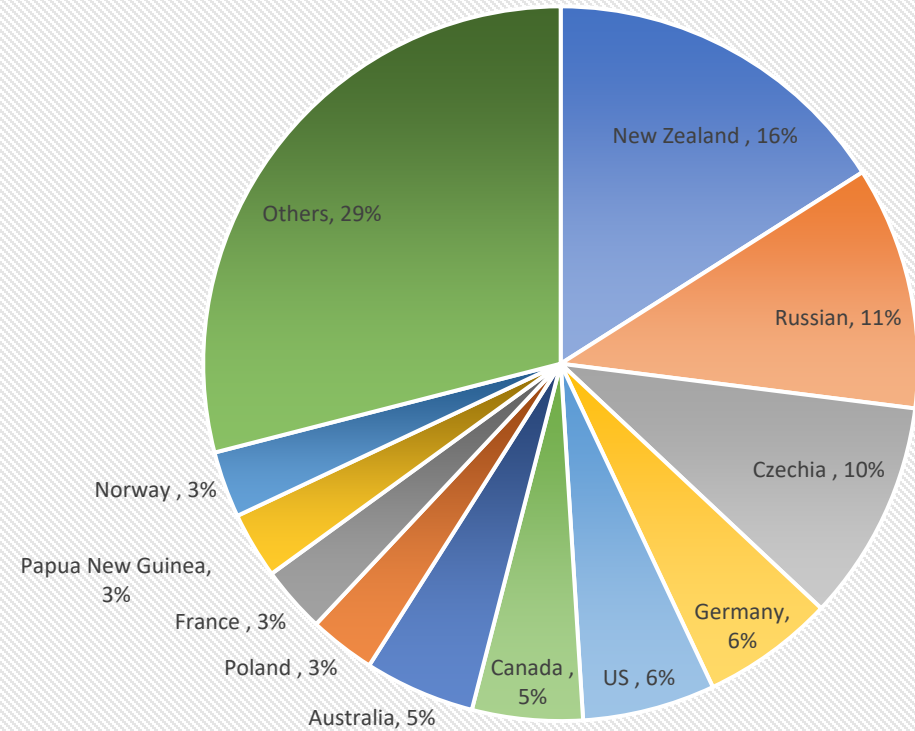


Global Forest Markets Snapshot -- Wood

Top Sawnwood Exporters

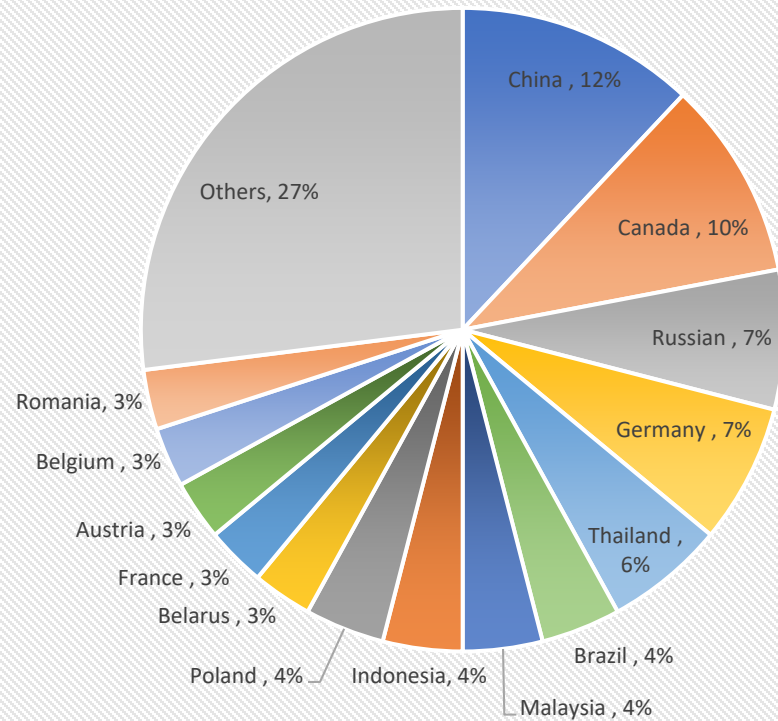


Top Industrial Roundwood Exporters

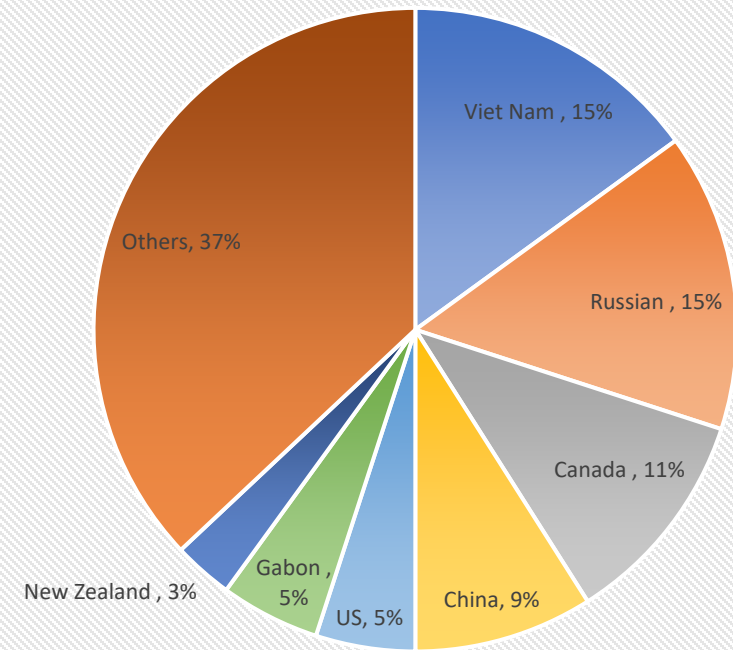


Global Forest Markets Snapshot -- Wood Products

Top Wood-based Panels Exporters

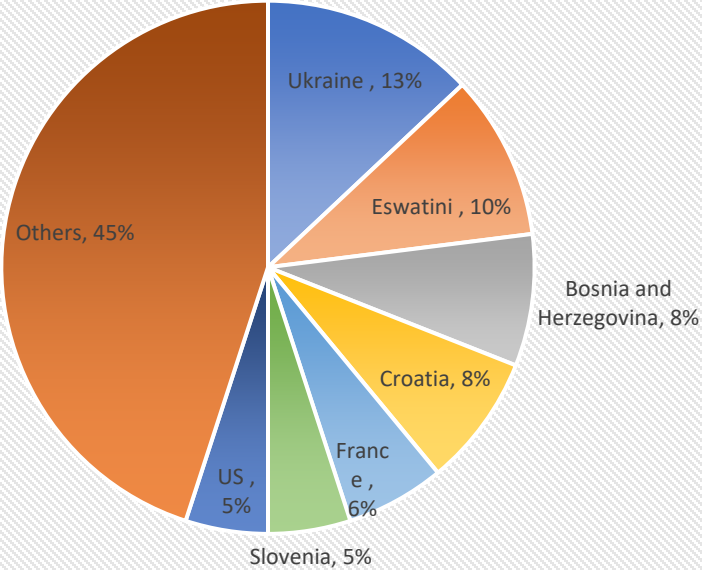


Top Veneer Sheets Exporters

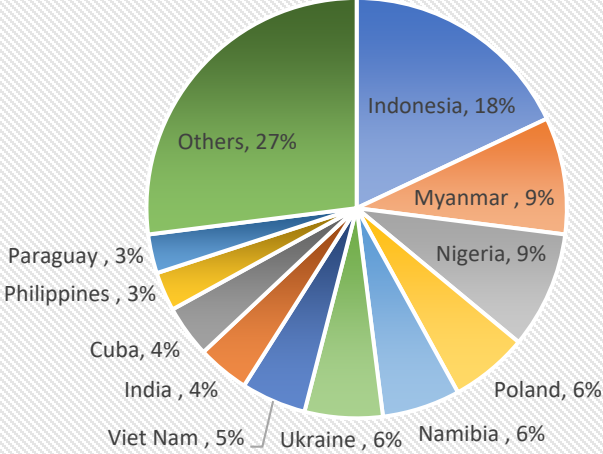


Global Forest Markets Snapshot -- Wood Energy

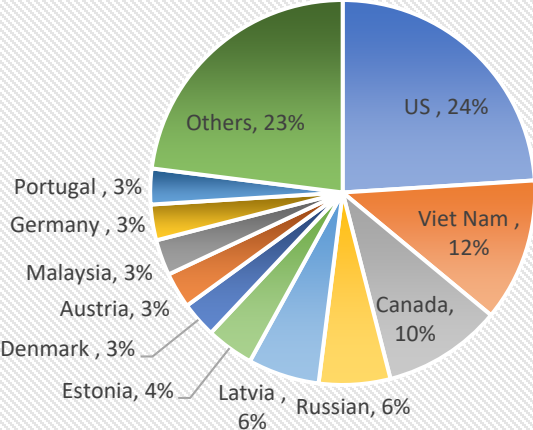
Top Wood Fuel Exporters



Top Wood Charcoal Exporters

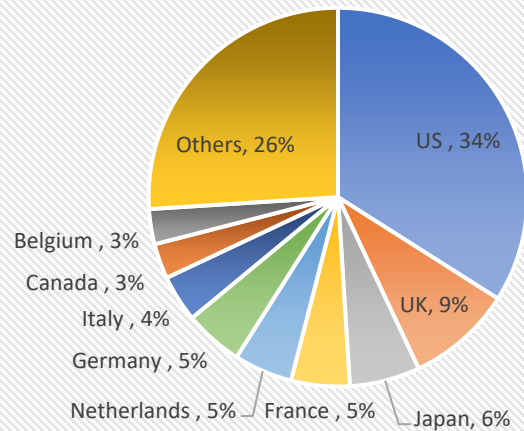


Top Pellets Exporters

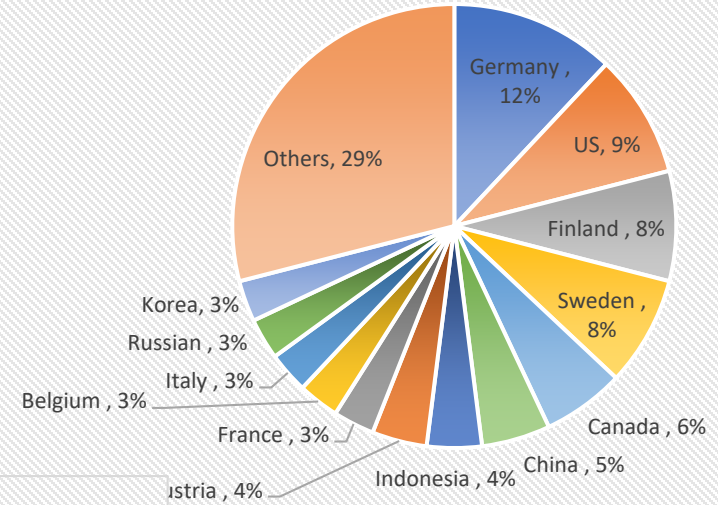


Global Forest Markets Snapshot -- Paper and Paper products

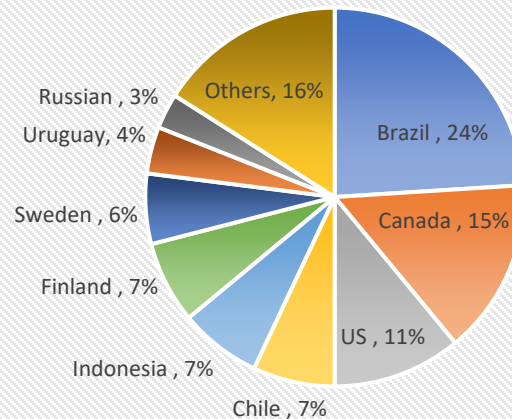
Top Recovered Paper Exporters



Top Paper and paperboard Exporters



Top Paper Pulp Exporters



Global Market Trends

- **LOG TRADE:** Russian log export ban in 2022 Implications for the global forest industry Russia has been a leading log exporter for decades and this may come to an end in 2022. A proposed export ban will have immediate impact on global trade flows of logs and lumber. China will be forced to explore new supply regions.
- **BIOENERGY:** Europe is the largest market for wood pellets globally will grow strongly to 2030 with EU renewable energy targets – requiring mobilization of new sources of wood raw materials, such as forest residues, recovered wood, and wood energy crops.
- **LUMBER:** softwood lumber growing supply shortages and price fly-ups.
- **Logistic Disruptions**

Market Overview- UNECE

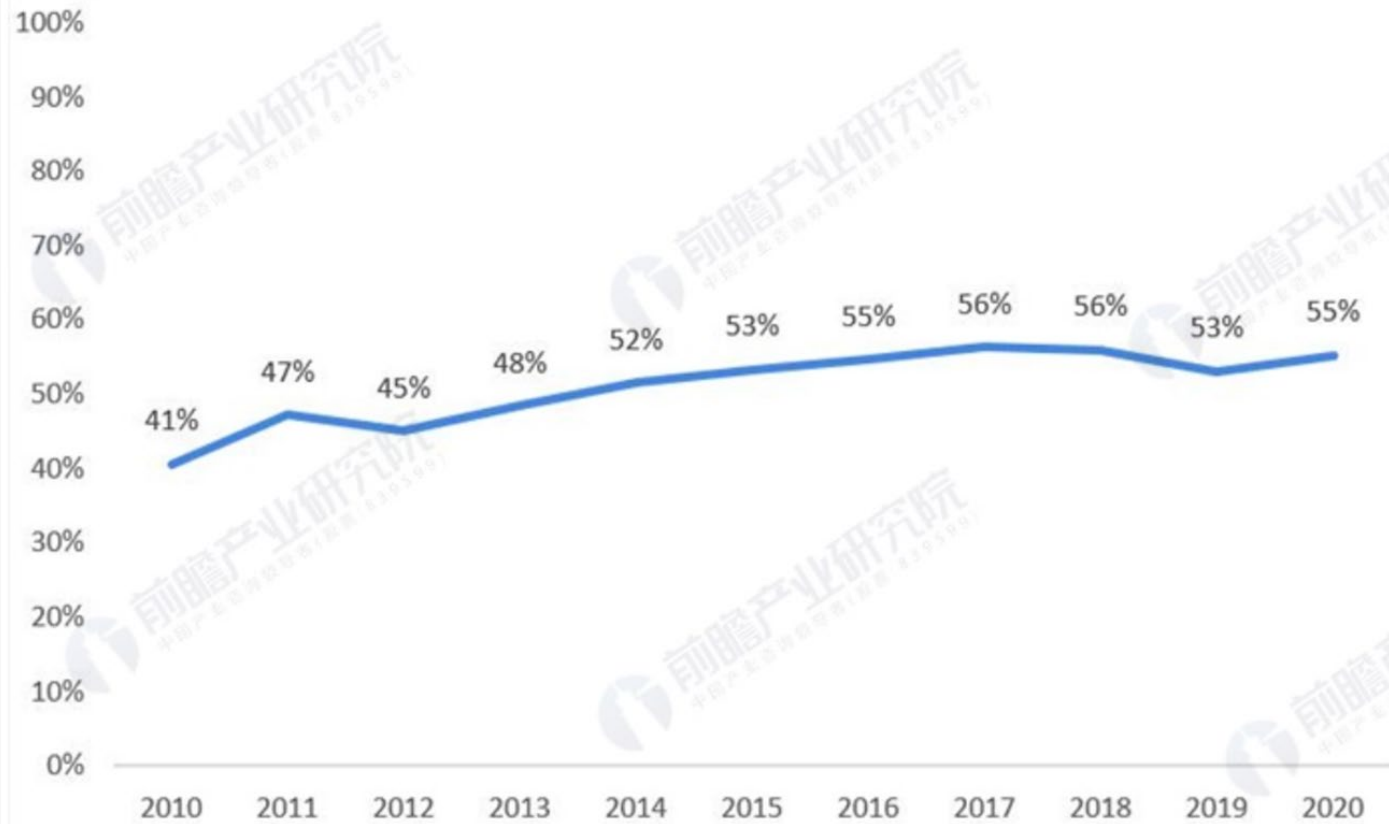
- Economic slow down in UNECE Region
- Global economic outlook is uncertain
- Housing markets performs better than economics in most countries in UNECE region
- The area of certified forests worldwide may have reached record high in mid-2020
- The forest-sector policy focus in 2019 was the increased use of wood for construction in Eastern Europe, Caucasus and Central Asia (EECCA); and the trade of forest products in North America.
- As for 2021, the German federal states forecast 35.1 million m³ of damaged softwood and 4.5 million m³ of damaged hardwood. Compared to last year, this would be a decrease of 42% and 21% for softwood and hardwood, respectively. the years 2019 to 2021 represent the peak of the bark beetle diaster in Czech Republic. “the greatest disaster for forests since the times of Maria Theresa”. The volume of damaged wood amounts to 113 million m³ from 2014 to 2020

Market Overview: China

- Guangxi is the largest timber producing province in China, accounting for about 1/3 of China's total timber production, the majority of Guangxi eucalyptus timber is used for paper and plywood production.
- Demand for wood products will continue to increase by rising household incomes and an increasing consumer preference for wood finishing vs. plastic or other industrial materials
- China's overall wood product imports are expected to increase slightly in 2021 compared to the previous year due to robust demand and low domestic inventory, with a larger volume of softwood imports making up for reduced hardwood imports.
- Biggest importer of industrial logs; imported 4 x more in 2019 than the top 9 importing countries combined. Shifted its log sourcing from N. America and Russia to Oceania and Europe; imports from Europe increased 20 x between 2017 and 2019. Import volume from the US dropped by 80%, due to the salvage logging of trees affected by bark beetle in Czechia and Germany.

China Wood Imports / Overall demand in % 2010-2020

图表6: 2010-2020年中国木材对外依存度(单位: %)



Market Overview- Vietnam

Table 3: Global Exports of Wood and Wood Products to Vietnam (value in thousand U.S. dollars)

Reporter	2016	2017	2018	2019	01/2019 - 02/2019	01/2020 - 02/2020
China	287,091	348,650	419,274	534,969	50,161	48,249
United States	215,592	264,226	311,830	349,738	57,709	68,290
EU 28 External Trade	133,856	177,572	192,923	205,756	38,540	-
Thailand	79,108	95,607	86,709	102,615	14,457	14,784
Chile	57,772	63,752	79,380	67,857	15,762	12,570
New Zealand	51,490	56,139	55,004	57,293	7,375	7,714
Brazil	30,563	43,436	59,532	56,377	8,867	8,303
Malaysia	78,042	72,931	75,927	54,018	10,722	7,278
Indonesia	21,236	19,757	20,331	26,004	3,469	4,089
Others	954,751	1,142,068	1,300,911	1,454,627	207,062	171,277
Total	1,909,501	2,284,138	2,601,821	2,909,254	414,124	342,554
Growth		20%	14%	12%		-17%

Source: Trade Data Monitor

- 3rd largest market for U.S. hardwood exports
- U.S. hardwoods are extensively used to produce quality furniture for both export and domestic consumption
- U.S. exports of forest products to Vietnam reached \$350 million in 2019, 90 percent was logs and lumber
- Logs: oak, walnut, and ash are the most popular species, with exports totaling \$65 million
- Lumber: poplar, oak, walnut, and alder are the best-selling species, totaling \$210 million