



Is the China “wood demand growth” era over?

Or will we see a new growth resurgence?

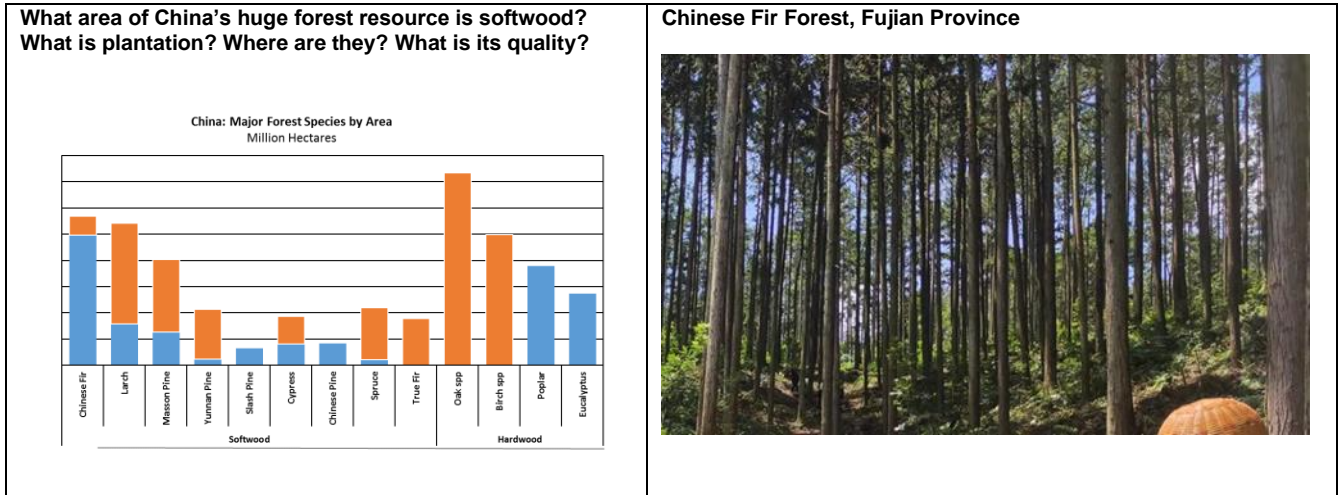
The Review includes demand and supply predictions for China domestic and imported softwood for 2025, 2029 and 2034

China Softwood Supply And Demand Outlook Review

The 2024 edition of the 'China Softwood Supply And Demand Outlook Review' is an update of the inaugural 2022 edition produced by DANA publishing (see experience of authors later).

This Review is a very important information tool for everyone involved/interested in importing softwood (SW) logs and lumber into or exporting these wood products to China. The Review profiles 27 countries which export SW logs and/or lumber to China, together with historic supply data for each.

It provides the analytical framework, and forecasts for China's **demand** for softwood 'Log Roundwood Equivalent' (RWE) in 2025, 2029 and 2034, and provides forecasts for SW log, lumber and RWE volume imported **supply** to China from 27 countries in 2025, 2029 and 2034.



Review Chapters

Introduction:

Photographs of China forests, log vessels, China domestic logs and sawmills, authors' experience and motivation for writing and publishing the initial Review in 2022 – and for updating it in 2024

China Domestic Forest Resources and Wood Supply

This chapter identifies China domestic forest resources by regions, provinces and species, with annual total, and softwood harvest trends. It includes maps showing the location of China's natural and plantation forests and softwood forests. It discusses China government policy and its likely impacts on future China softwood harvest volumes and quality

Global Softwood Log and Lumber Imports to China

This chapter introduces China's history of importing softwood logs and lumber over the past 35 years and provides the four major softwood log import and five major lumber import 'subplots'

China Softwood Demand Outlook

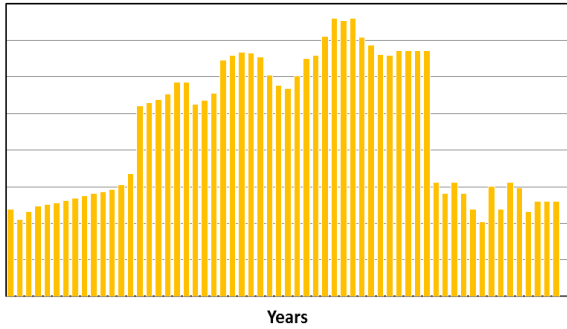
This chapter reviews how China's annual GDP growth has performed over the last 55 years and the future impact from the change from a 'mortgage' to a 'high technology — consumer' economy; shows the correlations between total softwood and imported softwood demand and construction starts, and uses a high R² regression to forecast housing starts (in billions m²) in 2025, 2029 and 2034 — and shows images of various Tier 1,2,3 and 4 cities

China Softwood Domestic and Import Supply Forecasts

This chapter discusses challenges to the China domestic softwood supply in the future, summarises 2023 and 2024E domestic log supply and import log and lumber and RWE volumes by 27 countries; then provides forecasts of China domestic softwood supply, and detailed log and lumber import forecasts by 27 countries for 2025, 2029 and 2034

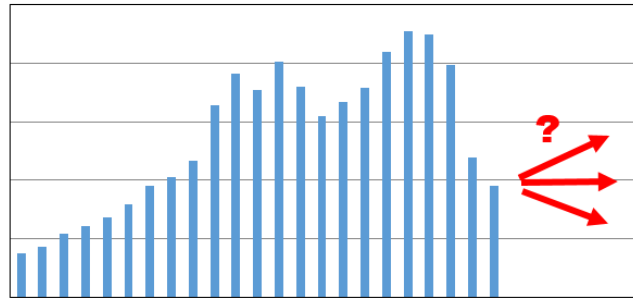
China used to have magnificent softwood forests. What happened to them? What happened to the harvest? Will it ever recover?

China: Softwood Sawlog Harvest
Million Cubic Metres



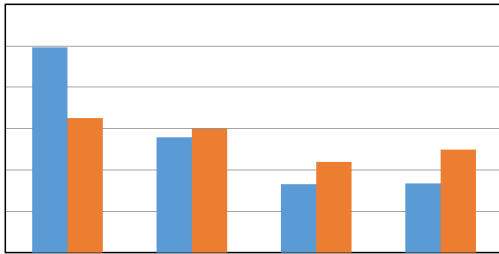
China demand is and will be largely determined by construction activity. What trajectory will this follow?

China Housing New Starts Area
Million Square Metres



What will China's demand be for imported softwood logs and lumber be in future?

China Softwood Import RWE Forecasts
Million Cubic Metres



What are the forecasts for China and importing countries' SW log and lumber capacity to supply?

China Domestic & Import Supply Based	2023	2025F	2029F	2034F
Million cubic metres				
Base Case				
Domestic SW Logs	X	X	X	X
Import SW Logs	X	X	X	X
Import SW Lumber	X	X	X	X
Import SW Lumber RWE	X	X	X	X
Total Import Log RWE	X	X	X	X
Total China Log RWE	X	X	X	X
% Import Log RWE	X	X	X	X
% Import Lumber RWE/Total Import RWE	X	X	X	X
China Demand Based				
Total Import Log RWE	X	X	X	X

About the Authors:

Mr. Dennis Neilson is a Director of the New Zealand based international forest industry advisory and publishing firm, DANA (NZ) Limited. Dennis co-organised the first shipment of New Zealand Radiata pine logs to China in 1985, and has visited ports and sawmills exporting logs and lumber to China — in New Zealand, Australia, Canada USPNW, US South, Russia, Germany, Finland, Sweden, Brazil, Chile and Uruguay. He has travelled to China more than 50 times. Dennis authored *'The Chinese Softwood Sawmilling & Veneer / Plywood Sector'* (2014), was the lead author of RISI's *'Russian Timber: A Growing Force in World Trade'* (2019), and co-authored the *'China Softwood Supply And Demand Outlook Review'* in 2022, and with private client project updates of this Review in 2023

Mr. Gavin Hao has worked in the forestry/pulp/paper industry since 2005. He has focused on wood products market research, forest investment due diligence, forest valuation, cost and price benchmarking, and in forest management. Prior to starting Gingko Consulting in 2019, Gavin was employed in senior positions in China with international forest industry companies including Forest Manager at Stora Enso (2005 -2009), Consultant with Poyry (2009-2010) and China specialist Forestry Consultant with RISI (2010-2019). Gavin has worked on many forest valuation/investment and due diligence projects across China: from Northeast (China-Russia border) to South (Hainan Island), and has visited many domestic Chinese Fir / Masson Pine plantations in China. Gavin co-authored RISI's *'China Timber Supply Outlook: A Comprehensive Analysis and Outlook'* (2010, 2011, 2013, 2015, 2017), and co-authored the *'China Softwood Supply And Demand Outlook Review in 2022'* and with private client project updates of this Review in 2023

Five logs ships loading New Zealand Radiata pine logs for China simultaneously, at Port of Tauranga — the world's largest log export port



Russian lumber in Chinese sawmill



ORDER FORM

2024 China Softwood Supply And Demand Outlook Review

POSTAL ADDRESS	TELEPHONE	E-MAIL ADDRESS
DANA (NZ) Limited, 3 Goodwin Avenue, Rotorua, New Zealand 3015	WhatsApp: +64 21 976 598	admin@dana.co.nz

2024 China Softwood Supply And Demand Outlook Review	QUANTITY	TOTAL US\$
PDF Version US\$ 4,300		
2022 Subscriber discounted price US\$ 3,850		
Excel data for all Tables and Charts: An additional US\$ 500		
Total		

ORDERING & PAYMENT

Please complete this order form, scan and return this form by email to admin@dana.co.nz

DANA will receive confirmation of your order and will send an invoice with payment details.

Please direct any order questions to admin@dana.co.nz

Orders and payment can also be made directly online at <https://dana.co.nz/publications>

ORDER SUBSCRIBER DETAILS

Full Name:
Position:
Company:
Address:
Address line 2:
Country:
Telephone: + [country code]
E-Mail [Clear address please]:

General Contract Provisions

All publications of DANA Publishing are subject to the copyright laws of New Zealand, Australia, United States and Canada. Reproduction of the report in any form is forbidden. Distribution of the analysis by the purchaser, other than within the company or organization purchasing the study is forbidden. The report represents the best judgement of the study's authors based on the information and data available prior to publication. While every effort is made to ensure the accuracy of the information contained herein, no liability is accepted for any errors or omissions, any opinions expressed, or recommendations made in this analysis.