


Abstract

China's spectacular economic growth over the last decade is having a dramatic impact throughout the world. It has become a leading nation in terms of forest products, and its influence is being felt as far afield as Cameroon and the United States. Burgeoning domestic consumption, in a nation with very limited per capita forest resources, has fueled the rapid rise in China's imports. Growing demand in the US, Europe and elsewhere for low-cost wood has also contributed to the country's ever-increasing demand for foreign timber. China has rapidly become the world's largest furniture manufacturer, capturing almost a third of the global trade in furniture over the last eight years.

In many supplier countries, particularly those with weak governance records, the increasing trade flows into China are associated with unsustainable harvests and illegal logging, and the abuse of forest communities' rights. However, China's growing demand also creates the possibility that millions of low-income forest producers can benefit from this new market. Trees and forest are the primary asset of millions of the world's poorest people and when governments enable the poor to use them wisely, they can be an important instrument of rural development.
China is now in the world's spotlight, with governments, industry and development agencies eager to learn more about the global impact the country is having on forests and forest industries. Until recently, they have been hampered by a scarcity of reliable information and a lack of rigorous, publicly accessible analysis of macro-level trends. Market information to date has been proprietary analysis, the cost of their use by all but the largest international investors and trade associations.

This paper and the body of research it represents aims to help fill this knowledge gap. It is an overview of the key findings of many research studies conducted by Forest Trends, the Center for Chinese Agricultural Policy (CCAP), the Center for International Forestry Research (CIFOR) and their many partners in China and the Asia-Pacific region. As such, it focuses on broader and more globally critical issues.

The synthesis of this research presents a wake-up call for the global forest community. One of our key findings is that domestic and export demand for Chinese manufactured wood products will continue to grow dramatically, at least over the medium term and probably well beyond. So, in turn, will the demand for both home-grown and imported timber. Furthermore, China should be seen as the harbinger of even greater change, as India and other populous developing countries increase their demand for forest products.

It is now clear that the global forest market is undergoing dramatic changes and that these changes have important implications for forests, forest people and the economic development of all nations.

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