

PÖYRY INSIGHT 见解:  
CHINA SOFTWOOD MARKET

# China Softwood Market: *The Real* demand drivers and implications for investment and trade





# What do the future trends in China's globally important softwood market mean for your business?

China's softwood market has experienced dramatic growth over the past 5 years, with imports of lumber and logs increasing by 360% and 80% respectively. Robust GDP growth and rapid urbanization has driven demand above the ability of local supply sources to satisfy.

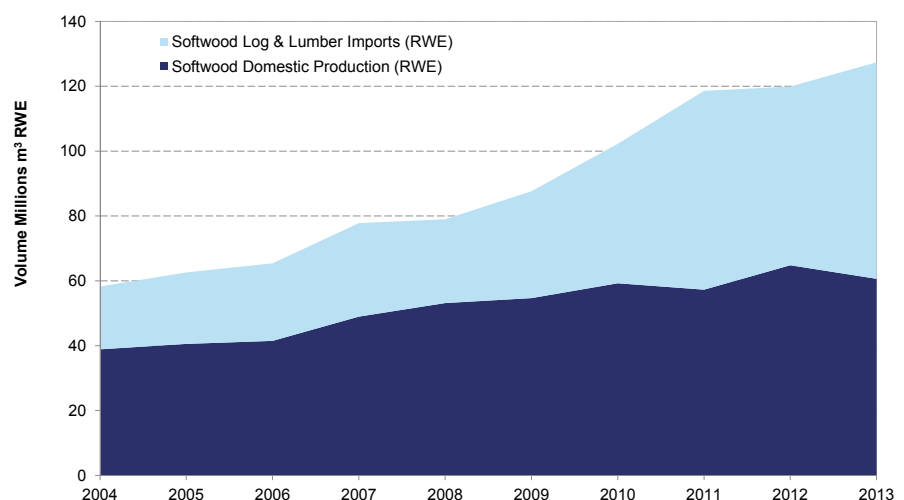
China is now the largest importer of softwood in the world. Changes are also occurring in the key supply sources and in the mix of lumber and raw logs being imported. New Zealand has emerged as China's largest softwood log supplier and Canada as the largest lumber supplier. Nevertheless, China's real future demand drivers by region and product segment remain poorly understood with implications for log and lumber suppliers. Contributing factors are differences in softwood types, quality, import locations and cost competitiveness. This study will help you understand the fundamentals of the Chinese softwood market.

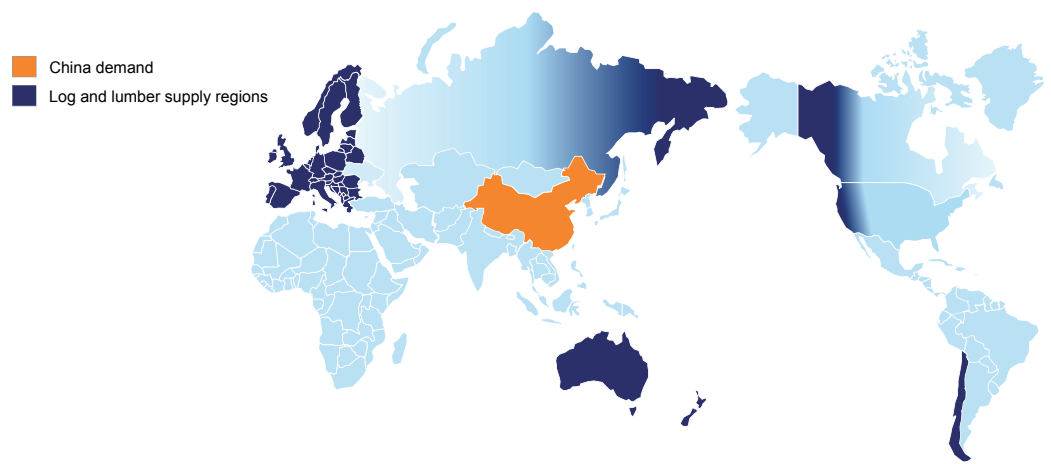
## **TIMBERLAND INVESTORS AND LOG AND LUMBER SUPPLIERS NEED TO KNOW ANSWERS TO KEY QUESTIONS:**

- Which regions in China will drive demand growth or contraction in the short- to medium-term considering demographics and urbanization?
- Which product segments will lead growth?
- Which softwood species and grades best meet particular product specifications?
- How will China's regulatory environment affect softwood trade (building codes, trade agreements, tariff/non-tariff barriers and forest certification)?

- Which export locations will be the most competitive to supply the future demand?
- What will China's future softwood import demand be under alternative growth scenarios?

Pöyry's Asia Pacific office network has undertaken this far-reaching study leveraging our presence in China and further supported by our global office network. We have collected data through a comprehensive on-the-ground survey in China encompassing: importers, distributors, processors, associations and downstream industries. This has been further assisted by reviews of key global log and lumber suppliers to the China market.





#### CHINA SOFTWOOD MARKET REPORT CONTENT:

Objectives & Methodology

Executive Summary

Demand Drivers

- Economic Activity & Growth
- Demographics & Urbanisation
- Regulatory Environment

Log/Lumber Supply

- Regional Trade
- Supply Review
- Supply Competitiveness

Log/Lumber Demand

- Demand Development
- Demand Scenarios and Outlook

Softwood Processing Industry

- Sawmills
- Plywood
- Cost Competitiveness

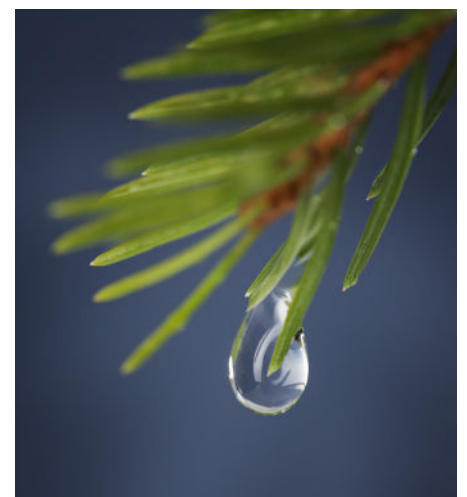
Softwood End Use Segmentation

- Building & Construction
- Furniture
- Other End-Uses

China Markets Influence on Forestry

Investment & Trade

- North America
- Oceania
- Europe



The leading advisor to the world's capital and resource intensive industries.  
Clients choose us for the sharpness of our insight, deep industry expertise and proven track record – because results count.

**Pöyry Management Consulting (Australia) Pty Ltd**

Mr Rudolf van Rensburg  
+61 3 9252 2700  
rudolf.rensburg@poyry.com

Dr George Goroyias  
+61 3 9252 2700  
george.goroyias@poyry.com

**Pöyry Consultoria em Gestão e Negócios Ltda**

Mr Jefferson B Mendes  
Tel: +55 41 3252 7665 16  
jefferson.mendes@poyry.com

**Pöyry Management Consulting Vancouver**

Mr Gordon Floe  
Tel: +1 778 329 0577  
gordon.floe@poyry.com

**Pöyry (Beijing) Engineering and Consulting Company Limited Shanghai Branch**

Mr Dali Zhang  
Tel: +86 21 6115 9660  
dali.zhang@poyry.com

**Pöyry Management Consulting Oy**

Mr Petteri Pihlajamäki  
Tel: +358 10 33 22772  
petteri.pihlajamaki@poyry.com

**Pöyry Management Consulting (NZ) Pty Ltd**

Mr Brian Johnson  
Tel: +64 9 918 1083  
brian.johnson@poyry.com

**Pöyry Management Consulting (UK) Limited**

Mr Cormac O'Carroll  
Tel: +44 20 7932 8217  
cormac.ocarroll@poyry.com

**Pöyry Rus LLC**

Mr Allan Flink  
Tel: +7 495 937 5257  
allan.flink@poyry.com

Cover image: Wikimedia  
Other images: colourbox.com

**[www.poyry.com](http://www.poyry.com)**

Pöyry is an international consulting and engineering company. We serve clients globally across the energy and industrial sectors and locally in our core markets. We deliver strategic advisory and engineering services, underpinned by strong project implementation capability and expertise. Our focus sectors are power generation, transmission & distribution, forest industry, chemicals & biorefining, mining & metals, transportation and water. Pöyry has an extensive local office network employing about 6,000 experts.



## ORDER FORM

# China Softwood Market: The *Real* demand drivers and implications for Investment and Trade

To order, please fill in the order form and send to

**Pöyry Management Consulting (Australia) Pty Ltd**

Mr Rudolf van Rensburg  
Tel: +61 3 9252 2700  
Fax: +61 3 9252 2707  
rudolf.rensburg@poyry.com

Dr George Goroyias  
Tel: +61 3 9252 2700  
Fax: +61 3 9252 2707  
george.goroyias@poyry.com

**Pöyry Consultoria em Gestão e Negócios Ltda**

Mr Jefferson B Mendes  
Tel: +55 41 3252 7665 16  
Fax: +55 41 3252-7665 branch 115  
jefferson.mendes@poyry.com

**Pöyry Management Consulting Vancouver**

Mr Gordon Floe  
Tel: +1 778 329 0577  
gordon.floe@poyry.com

**Poyry (Beijing) Engineering and Consulting Company  
Limited Shanghai Branch**

Mr Dali Zhang  
Tel: +86 21 6115 9660  
Fax: +86 21 6115 9670  
dali.zhang@poyry.com

**Pöyry Management Consulting Oy**

Mr Petteri Pihlajamäki  
Tel: +358 10 33 22772  
Fax: +358 10 33 21031  
petteri.pihlajamaki@poyry.com

**Pöyry Management Consulting (NZ) Pty Ltd**

Mr Brian Johnson  
Tel: +64 9 918 1083  
Fax: +64 9 918 1105  
brian.johnson@poyry.com

**Pöyry Management Consulting (UK) Limited**

Mr Cormac O'Carroll  
Tel: +44 20 7932 8217  
Fax: +44 20 7932 8270  
cormac.ocarroll@poyry.com

**Poyry Rus LLC**

Mr Allan Flink  
Tel: +7 495 937 5257  
Fax: +7 495 937 5256  
allan.flink@poyry.com

**THANK YOU FOR ORDERING!**

# China Softwood Market:

## The *Real*/demand drivers and implications for Investment and Trade

TO ORDER PLEASE COMPLETE AND RETURN THE BELOW

- |  |                  |
|--|------------------|
| <input type="checkbox"/> Multi-client Study              | USD 8 500        |
| <input type="checkbox"/> Client Presentation – Optional: | Quote on request |
| <input type="checkbox"/> China Study Tour                | Quote on request |

METHOD OF PAYMENT AND DELIVERY

- ☐ Please invoice me.
- ☐ I enclose a cheque (made payable to Poyry Management Consulting (Australia) Pty Ltd).
- ☐ Direct bank transfer.

An invoice will be issued on order, and the report dispatched on receipt of payment.

Name: _____	Position: _____
Company: _____	Phone: _____
Address: _____	Fax: _____
City: _____	e-mail: _____
P.O.Box: _____	GST Number: _____
Country: _____	