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## Article

February, 2011

### **American hardwoods make a spectacular rise in Asia in 2010 towards US\$1 billion**

**According to the latest data from the U.S. Dept of Agriculture, exports of American hardwood to China and Southeast Asia have recovered strongly; returning trade to former levels and giving rise to the view that this sourcing of hardwood is driven largely by recovering exports and the buoyant domestic Asian economies. Value is now close to US\$1 billion.**

American hardwood sawn lumber shipments to China (including Hong Kong) rose by 72% in value for 2010 over 2009 and achieved the highest value at US\$377 million in the last 5 years. U.S. hardwood log shipments to China also hit a peak at US\$263 million – an increase of 62% over 2009. Hardwood veneer shipments also improved 47%. The total value of all American hardwood material (logs, lumber, veneer, plywood, mouldings, flooring and siding) shipped in 2010 to China and Taiwan combined to US\$685 million – an overall increase of 66%. “Domestic growth in internal joinery, furniture and flooring has been continuously increasing the demand in China for American hardwoods,” says John Chan, AHEC’s Regional Director for the Southeast Asia and Greater China.

In Southeast Asia the recovery has followed a similar pattern with 49% total increase in value of all American hardwood materials to all the main ASEAN markets. Sawn lumber shipments were up in value by 58%, demonstrating the trend towards processed lumber rather than logs which were up 33% in value. Overall in Southeast Asia, imports of American sawn hardwood were exactly 2/3rds of the total at 66%, with logs at 27% and veneer 5%.

Leading the ASEAN imports of American hardwood was Vietnam with lumber at US\$102 million – way ahead of the previous peak of US\$65 million in 2007 – and registering an increase of 70% over the value in 2009. This can be attributed to ongoing exports of competitive furniture to world markets as well as a growing



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demand for internal joinery in the residential and hospitality sectors. Hardwood log shipments from the USA to Vietnam were only 17% up and amounted to US\$39 million, also demonstrating manufacturers' increasing desire to ship graded lumber rather than logs.

Indonesia was the second market in Southeast Asia for American hardwoods with lumber up 55% and back to the 2008 peak level at US\$18 million. However log imports from USA doubled to \$10 million, showing that many producers in Indonesia are still looking for raw material rather than converted lumber. Imports of U.S. veneer also recovered by 191% over 2009 at US\$5 million, but are still running slightly behind the level sustained from 2005 to 2008, before a dramatic fall in 2009.

Thailand, still a very significant market worth US\$23 million in total, has not recovered to the peak level of 2006, although lumber rose 11% in 2010 and logs by 86% to their highest level ever.

Malaysia similarly has some catching up to its own import peak from the USA in 2007, although it registered a healthy 54% increase in sawn lumber and up 36% in the value of log shipments.

The relatively small market in Singapore did catch up with 58% increase, placing it ahead of the Philippines where demand for American hardwood sawn lumber has fluctuated over the years from US\$1 to US\$3 million – and log imports are insignificant.



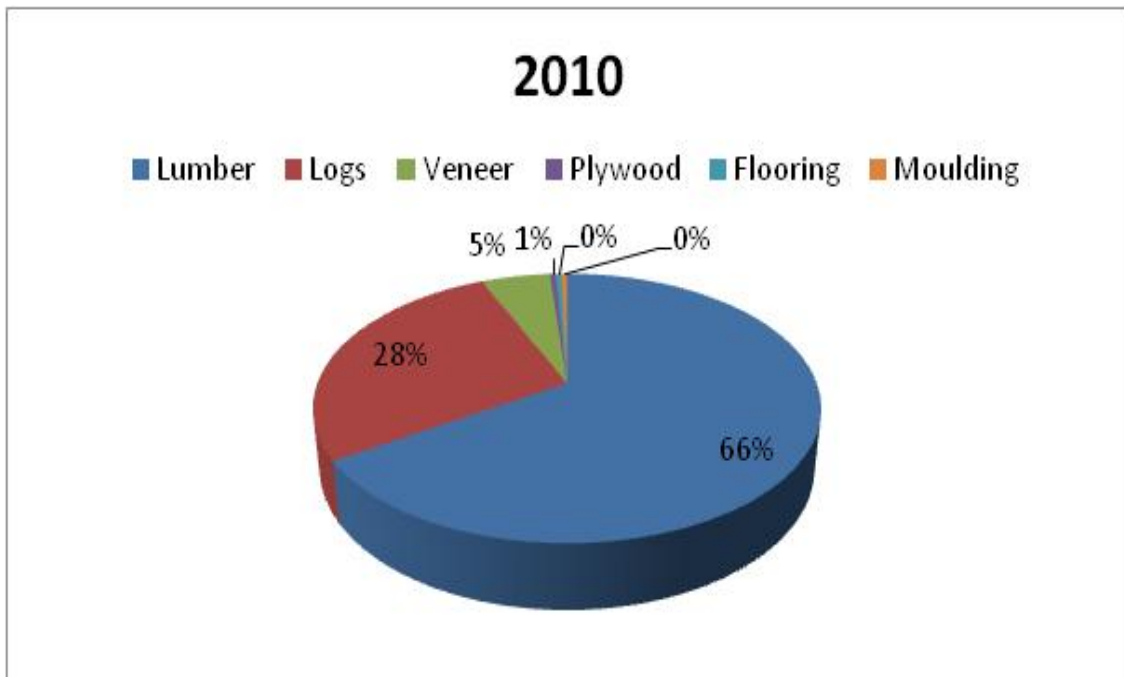
**American Hardwood Export Council - Southeast Asia & Greater China**

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Product	2005	2006	2007	2008	2009	2010	% Change	% of Total
Lumber	84	110	128	109	96	151	58%	66%
Logs	42	31	52	58	47	63	33%	27%
Veneer	13	15	15	13	9	12	35%	5%
Plywood	1	1	1	1	1(.659)	1(1,279)	94%	
Flooring	>1	>1	>1	1	1	1	-2%	
Moulding	0	0	>1	>1	>1(,066)	>1(,011)	-83%	
<b>Grand Total</b>	141	158	196	181	154	229	49%	100%

**Table: Shipments of American hardwoods to Southeast Asia 2005-2010 by value (US\$ million)**  
 (Variances due to rounding)

Source: USDA FAS 2011



The total value of American hardwood material shipped to ASEAN countries in 2010 amounted to US\$229 million, which together with China and Taiwan totals US\$914



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million, or now close to one billion dollars. “This represents extraordinary progress for the American Hardwood Export Council on behalf of the U.S. hardwood industry, with promotional funding from the Dept of Agriculture in Washington DC,” says Mike Snow, Executive Director of AHEC.

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