The Global Political Economy of Timber

Forest & Fiber
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Wood Fiber Flow

Source: FAO, 2007 (by volume)
Timber Product Supply Chain

Upstream
- Forest
- Logging
- Primary Manufacturing

Raw Material
- pulp logs (for paper)
- saw logs (for lumber & panels)
- lumber
- panels
- pulp & paper

Downstream
- Commodities
- Secondary Manufacturing
- furniture
- flooring, mouldings, etc.
- tissue products
- packaging

Manufacturers

Retail

Customers

Finished Goods
- End Consumer
Timber and China

The Rise of China
Half of Timber Traded Now Goes through China

China’s Forest/Paper Imports

China’s Forest/Paper Exports
China Fibre Deficit Growing

International Wood Markets Group, May 2011
New Chain Leaders

The Power of Big Retail
Big Retail Power

Wal-Mart Growth in Revenues (1980-2009)

Big Brand Global Forest Governance
Supply Chain Greening
Tackling Consumption

Paper/Paperboard Consumption by Country, 2008
Forest & Fiber: Global Challenges

• Balancing regional fiber deficits
• Co-regulating global supply chain governance efforts
• Facilitating sustainable consumption and responsible consumerism