

# Study on China's Domestic Tropical Timber Market

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# 1 Project Overview

This is a qualitative study (not quantitative) on China's domestic processed tropical timber market, with a focus on interior furniture. The study examines the perceptions, purchasing criteria, and barriers of Chinese importers versus professional end-buyers (architects, interior designers, property developers). The geographic origin of interest is COMIFAC countries, particularly Gabon, Cameroon, and the Republic of Congo.

The study aims to generate operational recommendations for African producers and ATIBT on species selection, market channels, messaging, and priority partnerships. Unlike quantitative market flow analysis, this qualitative approach captures nuanced insights into decision-making processes, trade-offs, and barriers that cannot be captured by numbers alone.

## 1.1 Methodology

The study is organized into five sequential phases, as described below

### Phase 1: Desk Research

The first phase consists of a targeted literature review covering Chinese regulations governing timber imports, including customs duties, CITES implementation, traceability requirements, and incentives for legality verification. This is complemented by an analysis of China Customs and Trident data covering the past five years (5-year trends), with a focus on HS codes 4403 (logs) and 4407 (sawn timber) imported from COMIFAC countries. The deliverable of this phase is a summary of market trends and the regulatory landscape.

### Phase 2: Interview Preparation

In the second phase, separate interview guides are developed for Category A (importers) and Category B (professional buyers, including architects, interior designers, property developers, and the newly approved category of manufacturers and marketers in flooring, furniture, and decoration materials). A pilot test of 2 interviews is conducted to refine the language and phrasing. Based on pilot feedback, the deliverable of this phase is finalized interview guides for both categories.

### Phase 3: Sampling and Outreach

The third phase involves identifying and recruiting interviewees. Based on the USDA Hardwood Market Update 2026 and other available sources, we employed a multi-channel identification methodology targeting both importers (supply side) and end-buyers (demand side). To identify importers, we focused on Zhangjiagang Port, China's largest hardwood import hub, accounting for over 20 percent of national hardwood imports, where we cross-referenced customs records, business directories, and port operation data. We complemented this with membership directories from the China Timber & Wood Products Distribution Association (CTWPDA) and its Wood Importers Committee, the only national industry organization for timber distribution with over 3,000 members, including major importers of African timber. For end-buyers, we targeted major furniture manufacturing clusters identified in the USDA report, including Nanchang (Jiangxi), known as the "Capital of Solid Wood Furniture," Qingdao (Shandong), and the Pearl River Delta (Guangdong), where manufacturers widely use imported hardwoods. This geographic and institutional approach allowed us to systematically build a representative sample of actors across the COMIFAC-China timber supply chain. The target is 10–12 importers and 6–8 professional buyers. Finally, 12 importers and 6 buyers have been interviewed. The deliverable of this phase is a justified target list of companies with confirmed contacts.

### Phase 4: Field Interviews

In the fourth phase, semi-structured interviews are conducted in Mandarin using the finalized interview guides. Most interviews are conducted remotely (by video or phone call). However, several respondents are located close to each other (e.g., in the same city or nearby cities), face-to-face

visits have been arranged in Zhangjiagang. A critical methodological note is that many Chinese companies handle both domestic sales and re-export to Europe and North America. The interviewer rigorously filters responses to focus strictly on the Chinese domestic market; otherwise, findings are skewed by export-driven behaviour (e.g., higher certification uptake driven by EU demand). Interviews are transcribed in Mandarin, with key excerpts translated into English. The deliverable of this phase is transcribed and translated summaries of all interviews.

### Phase 5: Analysis and Reporting

The final phase consists of thematic analysis followed by report drafting. Thematic analysis is conducted using an Excel-based qualitative analysis grid, with findings analysed separately for importers versus end-buyers to avoid producing averaged recommendations that are useful to neither group. The analysis identifies convergences and divergences between the two groups and generates operational recommendations on species, channels, messages, and priority partnerships for African producers and ATIBT. A draft report is prepared and submitted to ATIBT for review. After integrating ATIBT's feedback, a final report is delivered. The deliverable of this phase is the final report.

## 1.2 Confidentiality Statement

To ensure candid and in-depth insights from Chinese market stakeholders, where interviewees requested anonymity, company names and individual identities were strictly anonymized in the study outputs, with only aggregated and de-identified findings reported to the funder. This confidentiality pledge was communicated verbally at the beginning of each interview and, where requested, provided in writing.

The key confidentiality principles are as follows. No specific company names will appear in any report. No individual names, titles, or contact information will be disclosed. All findings will be presented in aggregated, de-identified form (e.g., "a Shanghai-based importer," "a large furniture manufacturer"). Raw interview records are used only for internal analysis and will not be shared with ATIBT or any third party in identifiable form. Interviewees could request enhanced confidentiality for specific sensitive information at any time.

# 2 Deliverables

## 2.1 Desk Research

China remains the world's second-largest wood importer (after the United States) and the largest wood product exporter globally. In 2025, the Chinese timber sector faced a challenging environment characterized by weak domestic demand, a prolonged housing market downturn, intensified international competition, and escalating tariff pressures. New housing starts in 2025 fell 74% compared to 2020, and commercial housing sales (by area) declined by 50% over the same period (China Bureau of Statistics, 2020 and 2025). Total timber production continued to rise due to the maturation of commercial forests, but consumption and trade volumes declined as the real estate and furniture sectors struggled. The government introduced a series of stimulus measures to stabilize the housing market, but their impact has been limited, with housing starts and commercial sales remaining well below historical peaks.

Consumer preferences have also shifted in ways that affect hardwood demand. Younger demographics, who are more likely to rent rather than own homes, tend to prefer furniture that is affordable, lightweight, and easy to move when relocating. This has reduced demand for solid wood furniture (imm-cologne, 2026). By contrast, families with children continue to favor solid wood furniture, as it is widely perceived to be more environmentally friendly and healthier for children due to its lower content of glues and chemical substances compared to composite or engineered wood products (Shangpu Group, 2026).

China's domestic timber production has expanded rapidly, particularly in fast-growing species such as eucalyptus and poplar, which are increasingly used in multi-layer composite boards. Domestic wood is often easier to obtain and less expensive than imported alternatives, allowing manufacturers to better control costs. This trend has weakened the competitive position of imported hardwoods in the Chinese market, particularly in price-sensitive segments.

Competitive pressures on African hardwood in the Chinese market stem not only from rising domestic supply but also from structural substitution among other import sources. In 2025, Thailand—China's largest source of broadleaf sawn timber—increased its market share to 44.5%, while imports from Vietnam surged by 139.8% year-on-year (Mulian Data, 2026). Southeast Asian rubberwood, leveraging cost advantages and logistical convenience, is rapidly penetrating China's mid-tier furniture manufacturing market. Meanwhile, although Russia remains China's largest supplier of softwood sawn timber (accounting for 69.6%), its total exports to China declined by 8.9%, reflecting the overall contraction of China's timber import market. U.S. timber imports, meanwhile, experienced a precipitous drop due to trade frictions (softwood logs -89.3%, hardwood logs -71.7%, hardwood sawn timber -71.7%), further consolidating China's import market toward New Zealand, Southeast Asia, and Russia (Mulian Data, 2026). Against this backdrop, African hardwoods face a triple squeeze: a shrinking overall market, expanding Southeast Asian competition, and inherent cost disadvantages (China Timber Importers and Exporters Branch, 2026).

Against this backdrop, this report provides a systematic analysis of the regulatory and market developments shaping China's timber import landscape. It draws on a targeted literature review of Chinese regulations governing timber imports, complemented by a five-year (2021–2025) trade data analysis of HS codes 4403 (logs) and 4407 (sawn timber) imported from COMIFAC countries. The following sections present the key findings on the regulatory framework and market trends affecting trade flows between COMIFAC countries and China.

### **2.1.1 China's national forestry policy**

China's forestry policy has undergone a fundamental reorientation over the past two decades. Historically focused on timber production, the policy framework has shifted toward a dual-objective system that balances ecological conservation with the development of a modern, market-oriented forest industry. This shift is embedded in successive Five-Year Plans and reinforced through institutional reforms and financial instruments.

The "14th Five-Year Plan for Forestry and Grassland Protection and Development (2021–2025)" set the current trajectory, establishing targets for forest coverage and stock volume. The "15th Five-Year Plan" period (2026–2030) is positioned as a phase for consolidating these gains and advancing modernization, with the 2026 National Forestry and Grassland Work Conference articulating a vision of "promoting quality, industry, and public benefit" (National Forestry and Grassland Administration, 2026a). The total output value of China's forestry and grassland industry reached approximately 11 trillion yuan in 2025 (National Forestry and Grassland Administration, 2026a; National Forestry and Grassland Administration, 2026b).

#### **I. Institutional and Financial Support Mechanisms**

A key feature of China's current forestry policy is the deliberate channelling of financial resources into the sector to stimulate high-quality development. In 2025, three central departments jointly issued a notice outlining 15 specific measures to boost forestry, including deepening financial services for collective forest tenure reform, supporting key national forestry strategies, and promoting industrial upgrading and the realization of ecological product value (National Forestry and Grassland Administration, 2026a). These measures encourage innovation in forest tenure mortgage loans, extension of loan terms, and the establishment of mechanisms for collecting and guaranteeing forest tenure rights. In effect, the policy aims to unlock the financial value of forest resources, making forestry a more attractive sector for investment.

#### **II. Industrial Development and Processing Sector Policies**

China's forestry policy places strong emphasis on developing the domestic processing industry and reducing reliance on imported processed wood products. The National Forestry and Grassland Administration has issued comprehensive guidelines identifying eight key areas of focus, including enhancing timber supply capacity, improving economic forest quality, promoting processing industry upgrades, and developing forest ecotourism and wellness (National Forestry and Grassland Administration, 2026b). The Western Region Encouraged Industries Catalogue (2025 Edition) explicitly supports wood processing industries in specific regions, including wood processing in Inner Mongolia, plywood and panel production in Guangxi, wood reserve processing and bamboo product deep processing in Sichuan, and wood processing and furniture manufacturing in Yunnan (National Development and Reform Commission, 2025).

In late 2025, six departments jointly issued opinions on accelerating the construction of modern state-owned forest farms (National Development and Reform Commission et al., 2025). The policy encourages these farms to develop under-forest economies (operational area: 650 million mu; annual output value: 1 trillion yuan), establish industrial bases for woody grain and oil products, and expand into deep processing and new business models (National Forestry and Grassland Administration, 2026b).

### III. Domestic Timber Supply

Following the Natural Forest Logging Ban (2015–2017), commercial logging in natural forests was effectively halted, shifting supply almost entirely to planted forests. Today, most of the domestic timber comes from fast-growing plantation species such as eucalyptus, poplar, and fir. According to USDA estimates, 2025 timber production is estimated at 144 million m<sup>3</sup>, a 5% increase from 2024's 137 million m<sup>3</sup>. Domestic timber is mainly low- to mid-grade species (eucalyptus, Chinese fir, Masson pine, poplar) used for construction, packaging, wood-based panels, and pulp (USDA, 2025). High-end products continue to rely on imported wood. Furniture sector revenues for enterprises above designated size fell by 10.7% year-on-year to RMB 612.5 billion in 2025 (Mulian Data, 2026). Wood furniture accounts for over 59% of total furniture sales (Research and Markets, 2025). Despite increased domestic supply, China's demand for imported tropical hardwoods persists. The furniture sector—which accounts for over 50% of wood consumption—continues to rely on imported species for high-end products, as domestic plantations cannot replicate the aesthetic and physical properties of tropical hardwoods (USDA softwood, 2025).

### IV. Strategic Rationale for Continued Imports

Despite domestic production gains, China's export-oriented processing sector creates a structural demand for imported timber, particularly tropical hardwoods that domestic plantations cannot supply. Domestic plantations supply softwoods and fast-growing hardwoods suitable for construction, packaging, and panels—not the range of tropical hardwood species required for high-end furniture, flooring, and decorative applications. China has built enormous processing capacity that cannot be fully supplied by domestic timber alone. The total value of wood product exports in 2025 was US\$16.3 billion, remaining broadly flat compared with 2024. Many processed wood products are re-exported to developed markets, with China exporting approximately €7.1 billion in wood-based goods to the EU annually, and wood furniture exports totalling US\$20.4 billion in 2025 (Fern EUDR China Report, 2026).

China's wood product imports have declined for four consecutive years. Log imports in 2025 totalled 31.38 million m<sup>3</sup> valued at US\$4.82 billion, down 13.1% in volume and 21.8% in value compared to 2024. Tropical log imports fell 25.2% in 2025 to 7.47 million m<sup>3</sup>, yet the average price for tropical logs remained higher than the overall log average, suggesting continued premium demand (China DTimber Importers and Exporters Association, 2026). The total value of wood product imports in 2025 was US\$11.22 billion, down 13.9% from 2024, marking the first time in a decade that imports fell below 60 million cubic meters.

### V. Regional Cooperation and Governance Mechanisms (COMIFAC-China)

Under the Forum on China-Africa Cooperation (FOCAC)—the primary platform for collective dialogue and cooperation between China and African nations, established in 2000—China has pledged to strengthen cooperation with Africa in wildlife protection and combat illegal logging and trade. The Beijing Action Plan (2019–2021), adopted at the 2018 FOCAC Beijing Summit, explicitly included commitments to enhance cooperation in wildlife protection, strengthen capacity building for African countries, and jointly combat illegal wildlife trade, with the two sides agreeing to explore cooperative implementation of wildlife protection demonstration projects. The Dakar Action Plan (2022–2024) further expanded these commitments by establishing an anti-smuggling cooperation mechanism between China and African customs authorities to crack down on crimes involving the smuggling of endangered wildlife and their products (China-Africa Business Council, 2021). The Tropical Timber Trade Facility (TTT) project, with its project note signed in 2022 and implemented by COMIFAC, China, and Germany through GIZ since 2023, aims to promote legal and sustainable tropical timber trade from Central Africa through China to international markets, helping Chinese buyers identify legal timber. These cooperative mechanisms serve as platforms for dialogue, technical assistance, and capacity-building, operating alongside China's domestic regulatory framework (China Timber, 2022).

## **VI Zero-tariff treatment**

Since May 1, 2026, China has implemented zero-tariff treatment covering 100 percent of tariff lines for all 53 African countries with which it has diplomatic relations, making China the first major economy to achieve unilateral, full-coverage zero-tariff coverage for all African nations. The policy was rolled out in two phases: 33 least developed African countries (including Angola, DRC, and CAR) received zero-tariff treatment starting December 1, 2024, while the remaining 20 countries (including Cameroon, the Republic of Congo, and Gabon) were included from May 1, 2026 to April 30, 2028 (MOFCOM, 2026). This means all COMIFAC member states are covered. In the annex, namely the "Country List and Tariff Item and Rate Table," of Announcement No. 5 of 2026 of the Customs Tariff Commission of the State Council, HS 4403 (logs) and HS 4407 (sawn timber) are not included; whereas the products under Chapter 44 that are granted zero tariff treatment are concentrated in deep-processed wood products such as 4408, 4409, 4412, 4418, and 4419. This demonstrates that the new Africa zero-tariff policy does not create any additional preferential treatment for logs and sawn timber, and that the policy advantages are mainly reflected in the deep-processing segment.

### **2.1.2 China's Regulatory Framework for Timber Imports**

China's regulatory system for timber imports has become increasingly stringent, with a focus on legality verification, phytosanitary risk management, and implementation of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES).

- **Core Regulatory Requirements for Origin and Legality**

Since the implementation of the new Forest Law on July 1, 2020, Article 65 explicitly prohibits the purchase, processing, and transportation of timber known to be from illegal source. This requires companies to establish ledgers recording timber inputs and outputs (China National People's Congress, 2019). Although Article 65 itself does not explicitly state that "due diligence is mandatory for imported timber," the legal risks faced by imported timber in practice require companies to do so, at least at a minimum level. Determining whether imported timber comes from an "illegal source" often requires reference to the laws of the source country. To fulfill the obligation of "not purchasing of illegal timber", companies objectively must understand their supply chains through some level of investigation, which constitutes a form of due diligence in essence. In practice, for customs declaration, importers must submit certificates of origin, phytosanitary certificates, contracts, and bills of lading. For species listed in the Import and Export Wild Fauna and Flora Commodity Catalog, a CITES import/export permit issued by the China National Endangered Species Import and Export Management Office is mandatory (Regulation, 2019). For non-regulated species, a non-species certificate is required (China Customs, 2024). Based on the interview findings, the China's competent authorities have not yet expected the importers or downstream companies to conduct the same level

of due diligence as EU Timber Regulation (EUTR), though it still remains to be seen how strictly the new Forest Law is enforced.

- **Quarantine and CITES Implementation**

All imported timber is subject to pest and disease quarantine. Timber with bark must undergo effective phytosanitary treatment (e.g., fumigation) in the exporting country, with details noted on the certificate. The General Administration of Customs (GAC) adjusts bans or alerts based on epidemic dynamics, such as pine wood nematode prevention for logs from specific countries.

CITES compliance is the most critical import threshold. Many high-value African timber species, such as *Pterocarpus erinaceus* (African rosewood), *Guibourtia* spp. (bubinga), *Khaya* spp. (African mahogany), and *Dalbergia melanoxylon* (African blackwood), are listed in CITES Appendix II (CITES, 2022, 2025). Importing without a permit not only risks cargo confiscation but also fines of up to 30% of cargo value under the Customs Administrative Penalty Implementation Regulations, with criminal liability for serious cases (China Customs, 2025).

- **Incentives and Enforcement Trends**

The cost of non-compliance has risen significantly. Customs cases from 2025–2026 show severe penalties for misdeclaring or concealing endangered species (e.g., falsely declaring *Dalbergia oliveri* as *Pterocarpus macrocarpus*). Violating companies not only face fines but may also be blacklisted, affecting future customs clearance efficiency (Customs Administrative Penalty Case Information Disclosure, 2025).

Conversely, compliant importers (e.g., AEO advanced certification holders) benefit from lower inspection rates and faster clearance. Enterprises that follow sustainable timber procurement guidelines may receive implicit local government support, such as preferential bank loans or tax deductions.

### 2.1.3 Certification schemes

Forest certification schemes—such as Forest Management (FM) and Chain of Custody (CoC) certification—can provide assurance regarding the legality of timber production and supply chains. In practice, however, the overall reach of certification remains limited when measured against the scale of China's forest sector. The gap is particularly pronounced among smallholders and other small-scale producers, who make up a significant portion of domestic timber supply but are largely outside the certified system.

Forest Stewardship Council (FSC Coverage in China

As of July 2026, there are approximately 173 valid FSC forest management certificates in China, covering 4.04 million hectares of forest area - —a very small fraction of the country's 241 million hectares of forest area (FSC Facts & Figures). The vast majority of FSC certificates issued in China are CoC certificates, which reflects China's role as a major hub for timber import, processing, and manufacturing rather than a primary producer of certified raw material. This pattern suggests that FSC certification in China is largely driven by export market requirements rather than domestic demand.

The National Scheme: CFCC

China's national forest certification scheme, CFCC, has been endorsed by PEFC and covers both FM and CoC certification since 2011. As of July 2026, it has certified 3.8 million hectares of forest area. Yet, much like FSC, its coverage remains modest in absolute terms. The scheme has been gradually developing, but its uptake among forest operators in China has been slow, particularly when compared to the overall size of the country's timber industry. CFCC has not yet developed a dedicated mechanism to address the specific requirements of the EU Deforestation Regulation (EUDR)—for example, the collection of geolocation data or verification of compliance with the post-

2020 deforestation cut-off date. However, PEFC has launched a public consultation on a revised version of its EUDR Due Diligence System (DDS) module standard (PEFC, 2026).

As a PEFC-endorsed scheme, CFCC-certified companies can potentially benefit from the broader recognition of PEFC in international markets. However, the practical utilization of this linkage in export-oriented supply chains remains limited, and awareness among Chinese operators is still developing.

## 2.1.4 EU Deforestation Regulation

The timber sector has operated under the EU Timber Regulation (EUTR), which has been in force since 2013, establishing a foundation of legality verification systems, due diligence practices, and operator awareness. The EU Deforestation Regulation (EUDR) is widely considered an upgraded version of the EUTR, introducing broader environmental due diligence requirements that extend legal production obligations to land use rights, environmental protections, forest management rules, biodiversity conservation, and related areas. However, for companies who followed EUTR for more than one decade, the EUDR does not bring big influence for timber industry.

According to the EUDR benchmarking system, countries are classified into three risk categories: high, standard, or low risk. For countries designated as high or standard risk, operators are required to carry out full due diligence procedures. By contrast, products originating from low-risk countries are eligible for simplified due diligence obligations.

However, based on the [Country Classification List - Green Forum - European Commission](#), a significant number of African countries are categorized as standard risk. As a result, timber sourced from these countries must undergo full due diligence, placing them at a competitive disadvantage compared to low-risk origins and offering no preferential treatment in sourcing decisions for exports to the EU.

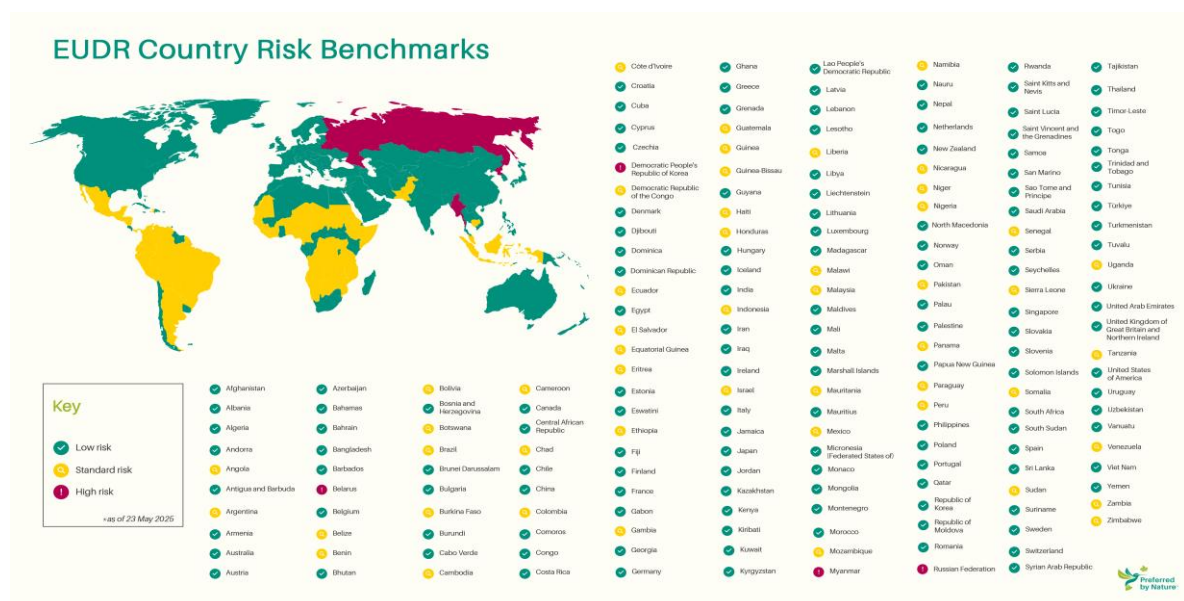


Image 1: EUDR Country Classification Map

## 2.1.5 Analysis of Timber Trade Data from COMIFAC Countries to China

The COMIFAC (Central African Forests Commission) region, comprising 11 Central African countries, has historically been a significant supplier of tropical hardwood logs to China, with the Republic of Congo, Cameroon, and the Democratic Republic of Congo being the largest exporters in the region. However, China's log imports have been in decline over the past five years, driven by a combination of weakening domestic demand (particularly in the real estate sector), rising domestic timber production, and supply constraints from log-exporting countries increasingly moving toward export bans or restrictions to promote local processing.

A review of Chinese customs data for all eleven COMIFAC member states reveals that only six countries—Angola, Cameroon, the Republic of Congo, the Democratic Republic of Congo, Equatorial

Guinea, and Gabon—have recorded timber exports to China during the 2021–2025 period. The remaining five countries (Burundi, Chad, the Central African Republic, Rwanda, and São Tomé and Príncipe) have no recorded timber trade with China.

- **Overall Market Trends**

Over the 2021–2025 period, China's imports of timber from COMIFAC countries experienced a notable contraction, reflecting broader shifts in Chinese demand and evolving supply dynamics. Total import value across both HS 4403 (logs) and HS 4407 (sawnwood) fell from approximately USD 0.87 billion in 2021 to USD 0.53 billion in 2025, a decline of roughly 40%.

**Logs (HS 4403):** The value of log imports from COMIFAC countries dropped sharply from USD 530.7 million in 2021 to USD 248.6 million in 2025, a decline of 53%. The most significant year-on-year decrease occurred between 2022 and 2023, when imports fell from USD 522.2 million to USD 381.4 million (-27%). The declines were widespread across all major COMIFAC suppliers, with Equatorial Guinea (-89%), Angola (-80%), and Cameroon (-55%) experiencing the most pronounced drops.

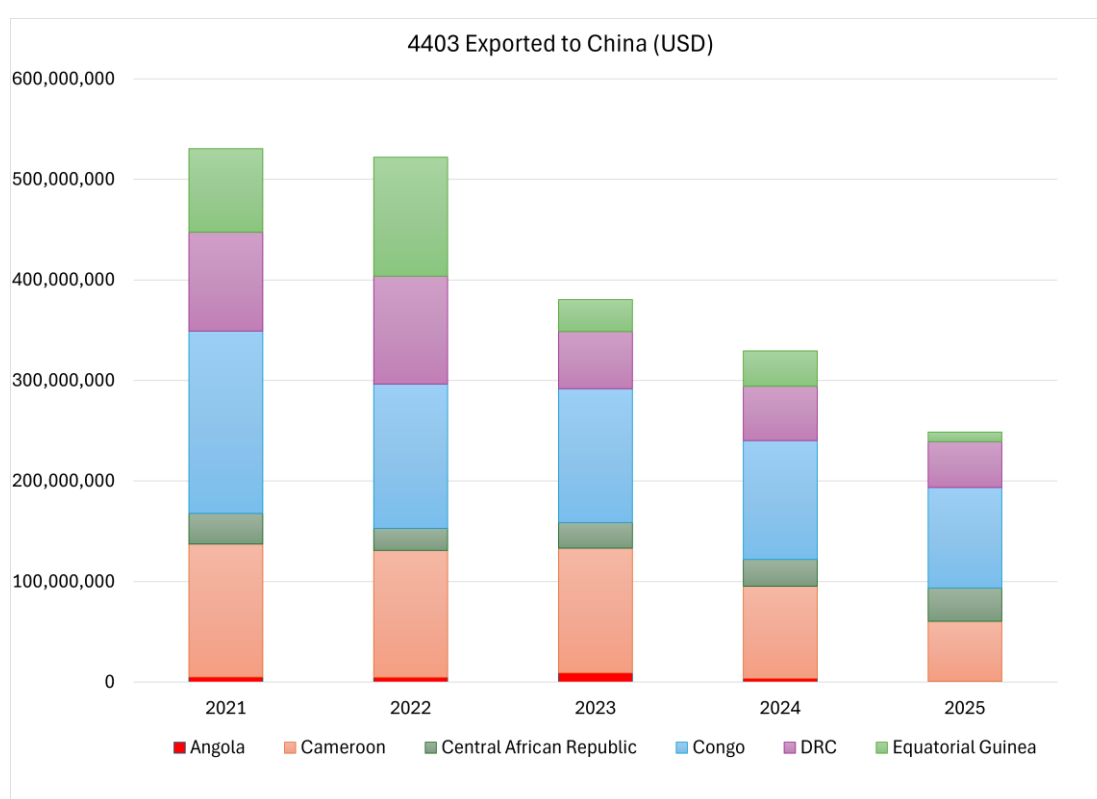


Chart 1: HS4403(Logs) imported from COMAIFAC countries into China

**Sawnwood (HS 4407) :** Sawnwood imports proved more resilient but still declined by 19% over the period, from USD 343.3 million in 2021 to USD 277.7 million in 2025. The five-year trend was more volatile than logs. Imports rose by 11% in 2022, fell by 21% in 2023, rebounded by 29% in 2024 to reach a peak of USD 386.3 million, before dropping by 28% in 2025. The rebound was primarily a correction from artificially suppressed 2023 volumes. In early 2024, several African producer countries experienced improved harvest and transport conditions. The Republic of Congo, a major sawnwood supplier, saw northern regions benefit from reduced rainfall, significantly improving access to the Douala port, while southern regions were transitioning out of the rainy season. This allowed the release of substantial accumulated log inventories that had been constrained by weather and logistical bottlenecks in the previous year. The improved supply conditions coincided with continued strong Chinese appetite for specific species. However, it represents a temporary demand surge rather than a structural market recovery, driven by a confluence of supply-side catch-up,

inventory dynamics, and species-specific consumption trends. (Shandong Provincial Department of Commerce, 2024)

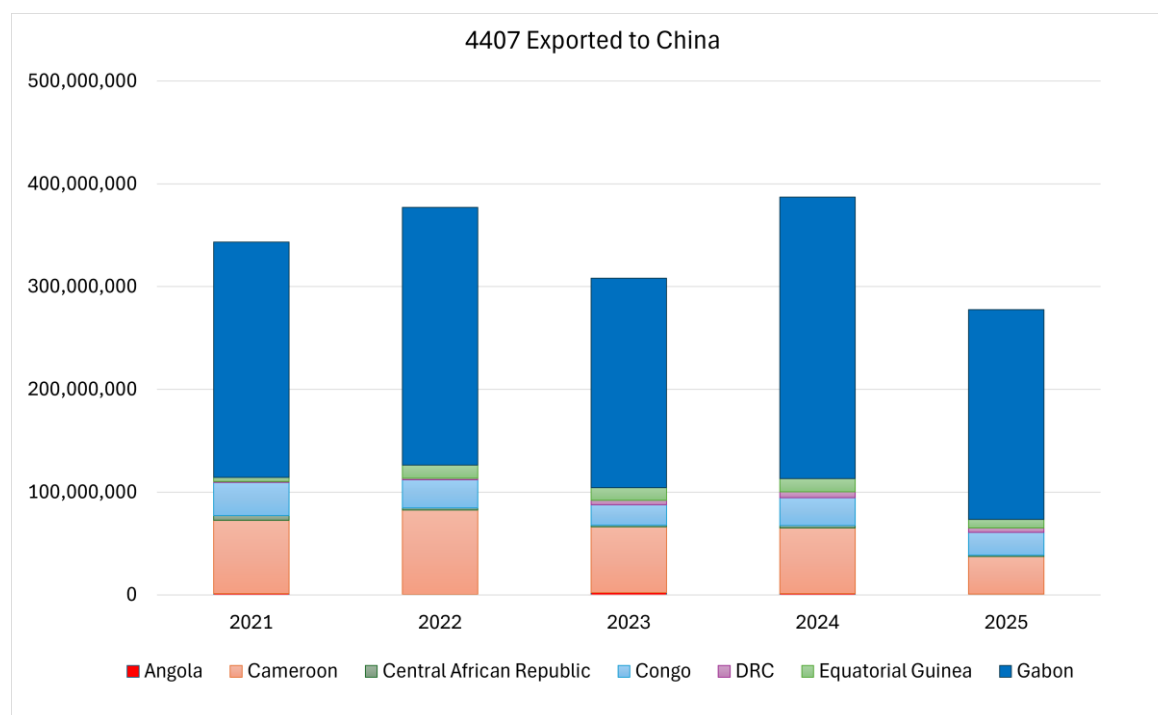


Chart 2: HS4407(Sawnwood) imported from COMIFAC countries into China

The decline in both categories reflects several factors: the slowdown in China's real estate and construction sectors, which has dampened demand for construction timber; growing self-sufficiency in domestic plantation timber, particularly in lower-value segments; and a structural shift by some COMIFAC countries, notably the DRC, toward exporting processed sawnwood rather than raw logs. Additionally, Chinese buyers are increasingly favoring processed wood products due to lower freight costs per unit value and simplified customs procedures, a trend visible in the narrowing gap between log and sawnwood import values over the five-year period.

#### • Logs vs. Sawnwood: A Comparative Analysis

A structural shift in China's timber import mix from COMIFAC countries took place between 2021 and 2025. In 2021, logs accounted for 60% of total timber import value from the region, while sawnwood represented 40%. By 2024, the balance had shifted to 47% logs and 53% sawnwood, and remained at this level in 2025.

The decline in log imports was both sharper and more consistent. Log values fell in every year from 2022 onward, with a cumulative drop of 53% over the period. In contrast, sawnwood values, while ultimately down 28%, showed a more resilient pattern. The 2024 surge in sawnwood imports (reaching USD 386.3 million) suggests that Chinese processors continue to seek high-quality tropical hardwoods for manufacturing, even as demand for raw logs weakens.

This divergence reflects two intersecting trends. First, several COMIFAC countries—most notably Gabon and increasingly the DRC—are developing domestic processing capacity and restricting raw log exports to capture more value within their own economies. Second, Chinese importers are adapting to higher shipping costs and more complex logistics by prioritizing processed timber, which offers greater value density and lower per-unit transport costs. The year-on-year volatility in sawnwood imports, however, suggests that this segment is more sensitive to Chinese domestic demand cycles.

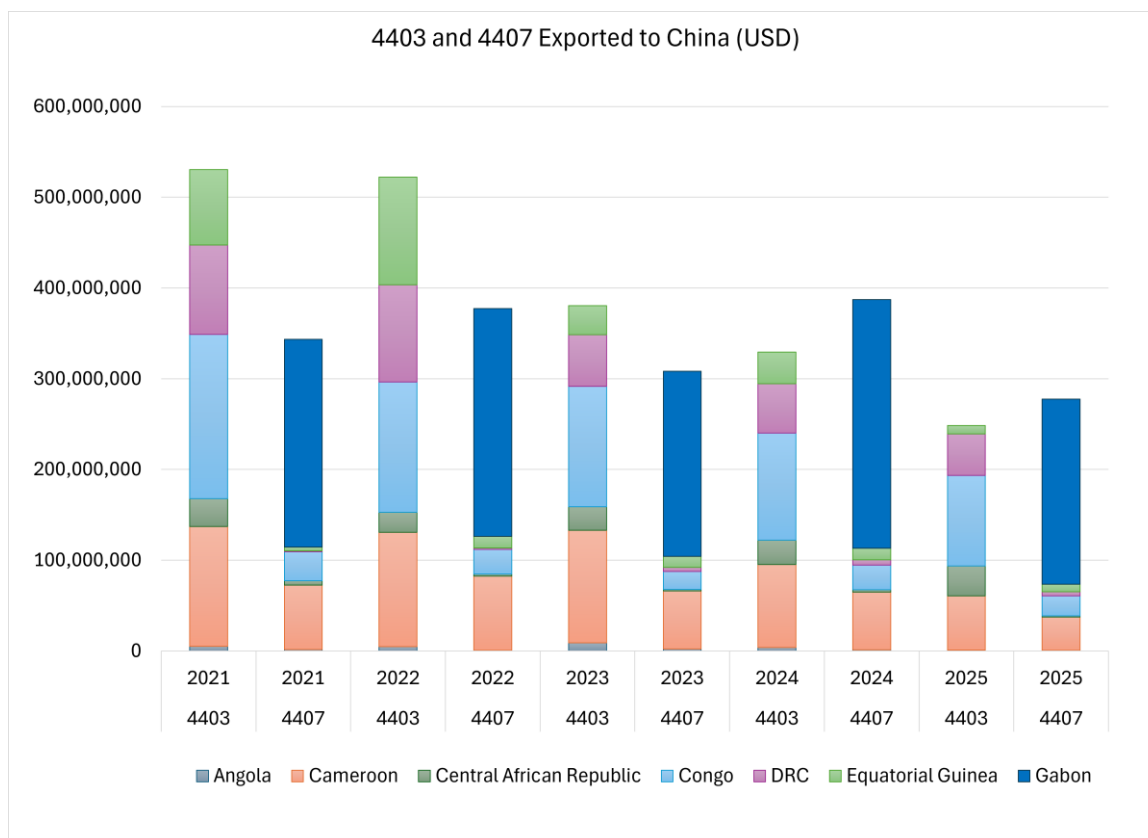


Chart 3: HS4403(Logs) and HS4407(Sawnwood) imported from COMIFAC countries into China

### Country-Level Analysis of Exporting to China

#### Gabon

Gabon is the dominant supplier of sawnwood(4407) to China from the COMIFAC region and is virtually absent from the log trade. Its sawnwood exports averaged USD 232.4 million annually over the five-year period, accounting for approximately 70% of all COMIFAC sawnwood imports by value. Gabon's sawnwood exports peaked in 2024 at USD 274.1 million, before declining by 25% in 2025 to USD 204.3 million. The 2025 decline reflects broader demand weakness across China's timber market, particularly in the furniture and construction sectors. Gabon banned the export of logs since 2010 and enhance from 2020(UNDP, 2022).

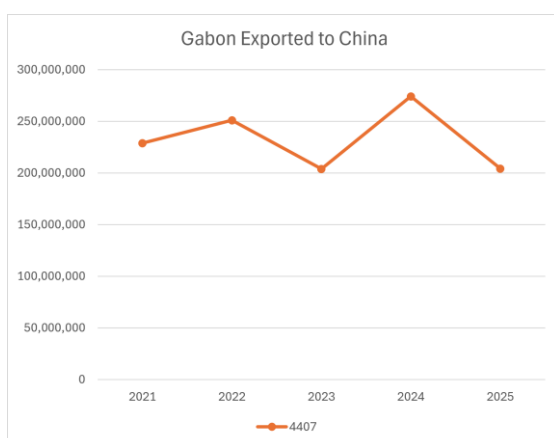


Chart 4: HS4403 (Logs) and HS4407 (Sawnwood) exported from Gabon to China

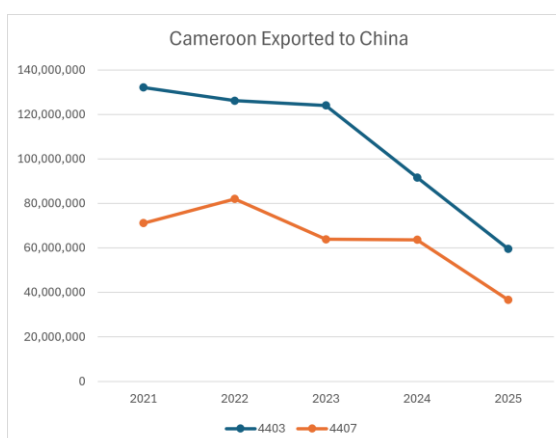


Chart 5: HS4403 (Logs) and HS4407 (Sawnwood) exported from Cameroon to China

## Cameroon

Cameroon is the second-largest timber supplier to China from the COMIFAC region and is distinctive in its dual role as a significant exporter of both logs(4403) and sawnwood(4407). The log imports from Cameroon fell from USD 132.1 million in 2021 to USD 59.6 million in 2025, a decline of 55%. Sawnwood imports followed a similar trajectory, though with a less severe decline of 49%, from USD 71.1 million in 2021 to USD 36.6 million in 2025. Overall, Cameroon's timber exports to China fell by 53% over the five-year period. The 2025 drop was particularly steep: log exports fell by 35% year-on-year, while sawnwood exports declined by 42%. Cameroon's performance suggests that it is facing dual pressure: competition from lower-cost producers in the log segment and from Gabon in the sawnwood segment.

## Republic of Congo (Congo-Brazzaville)

The Republic of Congo has historically been the largest log supplier to China from the COMIFAC region, though its position has eroded. Log imports from Congo fell from USD 181.2 million in 2021 to USD 99.9 million in 2025, a decline of 45%. Sawnwood imports declined by 31% over the same period, from USD 32.3 million to USD 22.2 million. The country's sawnwood exports are more volatile than logs, with a peak in 2021 and a low in 2023, followed by a partial recovery in 2024 and another decline in 2025. While Congo remains the leading COMIFAC log supplier, its market share has eroded due to the DRC's shift toward processing and Cameroon's continued dual-track exports.

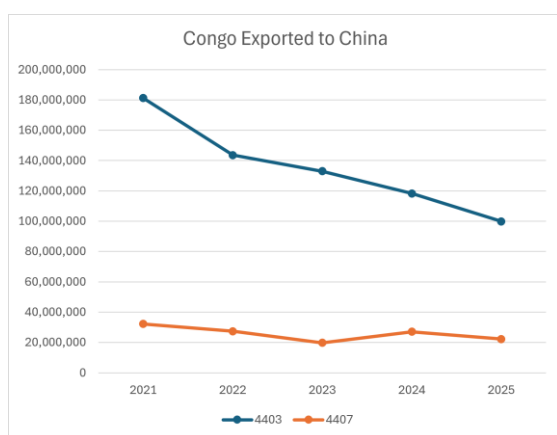


Chart 6: HS4403 (Logs) and HS4407 (Sawnwood) exported from Congo to China

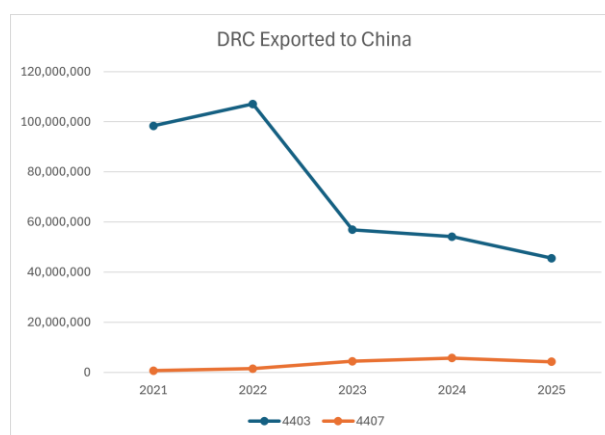


Chart 7: HS4403 (Logs) and HS4407 (Sawnwood) exported from DRC to China

## Democratic Republic of Congo (DRC)

The DRC is the only COMIFAC country that experienced net growth in timber exports to China over the five-year period. Its sawnwood exports rose from USD 0.68 million in 2021 to USD 4.25 million in 2025, a remarkable 520% increase. This is a deliberate regulation shift by the DRC toward promoting domestic wood processing and reducing raw log exports (Loi n° 011/2002 du 29 août 2002 portant Code forestier, 2002). Log exports declined by 54% over the same period, from USD 98.4 million in 2021 to USD 45.6 million in 2025. The DRC has become the fastest-growing sawnwood supplier in the region, a trend that is likely to continue as its processing capacity expands. Despite the decline in log exports, the DRC's total timber exports to China were relatively stable in value, reflecting the higher unit value of sawnwood.

## Equatorial Guinea

Equatorial Guinea has experienced the most dramatic decline of any COMIFAC country, driven almost entirely by a collapse in log exports to China. Log exports fell by 89% over the five-year period, from USD 83.2 million in 2021 to USD 9.5 million in 2025. The most significant drop occurred between 2022 and 2023, when log exports fell from USD 118.5 million to USD 31.7 million (-73%). Sawnwood exports from Equatorial Guinea are modest, averaging approximately USD 10 million

annually, but grew by 96% over the period from over 4.2 million USD to around 8.3 million. Overall, Equatorial Guinea's timber exports to China fell by 84% over the five-year period, suggesting major structural challenges in its forestry sector, possibly related to resource depletion, policy changes, or loss of market competitiveness.

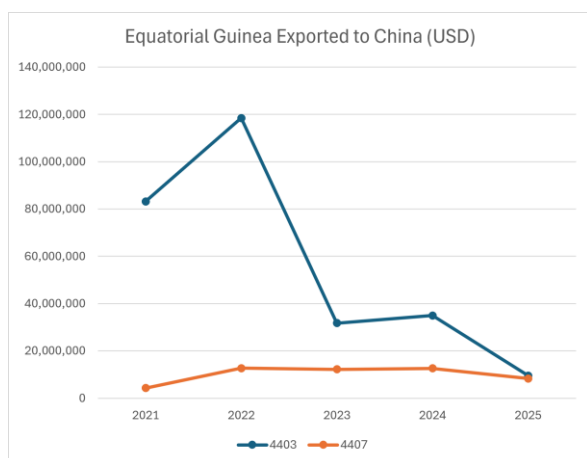


Chart 8: HS4403 (Logs) and HS4407 (Sawnwood) exported from Equatorial Guinea to China

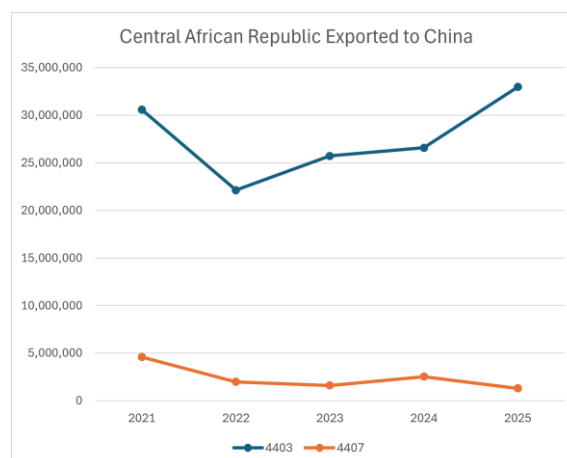


Chart 9: HS4403 (Logs) and HS4407 (Sawnwood) exported from Central African Republic to China

### Central African Republic

The Central African Republic is a minor timber supplier to China compared with other COMIFAC countries. Its log exports averaged approximately USD 27.6 million annually over the period, with a 9% overall increase from 2021 to 2025. Sawnwood exports averaged USD 2.4 million annually and declined by 72% over the five-year period. Total timber exports from the CAR increased by 1% over the period, with 2024–2025 showing some recovery. The CAR's limited role in China's timber market is due to a combination of factors, including its landlocked geography, political instability, and relatively small forestry sector.

### Angola

Angola is the smallest timber supplier to China among the COMIFAC countries analyzed. Log imports fell by 80% over the period, from USD 5.1 million in 2021 to USD 1.0 million in 2025, with a particularly steep decline from 2023 to 2024. Sawnwood imports declined by 53%, from USD 1.5 million to USD 0.7 million. Angola's role as a timber supplier to China remains marginal, with limited processing capacity and competition from other suppliers accounting for its minor market share.



Chart 10: HS4403 (Logs) and HS4407 (Sawnwood) exported from Angola to China

## Summary

China's timber imports from COMIFAC countries have undergone a profound transformation between 2021 and 2025. Total imports declined by 43%, but this aggregate figure masks a structural shift toward sawnwood (now 60% of the total, up from 40% in 2021) and away from logs. Gabon continues to dominate the sawnwood trade, while the Republic of Congo remains the largest log supplier despite significant declines. The DRC is the region's only growth story, with sawnwood exports expanding 520% as part of a deliberate policy shift. Cameroon and Equatorial Guinea have experienced the steepest declines, reflecting competitive pressures and structural challenges. For COMIFAC exporters, the Chinese market is contracting in volume but becoming more discriminating in its requirements—with a clear preference for processed products and consistent demand for certified and traceable timber.

## 2.2 Interview Findings:

### 2.2.1 Importer interviews

Finally, a total of 12 importers were interviewed across multiple provinces in China in July and August 2026, with a strong concentration in Zhangjiagang city of Jiangsu Province (8 out of 13), which serves as a major hub for tropical timber trade. Other locations included Guangzhou city of Guangdong province), Zibo city of Shandong province), and Wenzhou city of Zhejiang province). The majority of these companies have been operating for 10–20 years, with annual import volumes ranging from 1,500 to 30,000 cubic meters.

The importers fall into three broad categories:

- 1) Pure traders – sourcing from African suppliers via agents/intermediaries, selling to domestic downstream customers (majority)
- 2) Vertically integrated operators – owning forest concessions and/or processing facilities in Africa
- 3) Niche specialists – focusing on single species or specific end-use applications.

Import Sources:

- Gabon is the most common source country (cited by 9 of 12 importers)
- Republic of Congo is the second most common (4 importers)
- Other sources include: Cameroon, DRC, Tanzania, Ghana, Angola, Mozambique
- Two importers also source from outside Africa: South America (Suriname) and Fiji

The most commonly imported African species across all importers were:

- 1) Sapele (*Entandrophragma cylindricum*) – the core volume driver for many, but prices have collapsed
- 2) Okoume (*Aucoumea klaineana*) – widely used for plywood, furniture, and increasingly sauna rooms
- 3) Beli (*Paraberlinia bifoliolata*) – subject to dramatic price volatility; popular among younger consumers when promoted
- 4) Mahogany – stable but declining demand
- 5) Ebony, Wenge, Iroko – niche high-end species with irreplaceable qualities for specific applications

The list is:

| Code | Location(Province or Country) | Main Species | Main Business |
|------|-------------------------------|--------------|---------------|
|      |                               |              |               |

|                    |                            |                                                                                   |                                                                                         |
|--------------------|----------------------------|-----------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| <b>Importer-01</b> | Guangzhou                  | Sapele, Acacia, Mahogany, Ebony, Iroko, Teak, Zebrawood, Wenge                    | Timber trade; mid-to-high-end residential, outdoor, and musical instrument applications |
| <b>Importer-02</b> | Gabon / Zhangjiagang       | Okoumé, Padauk, Andoung, Zebrawood, Ebony                                         | Board and veneer exports; 1/3 of output to China                                        |
| <b>Importer-03</b> | Angola and China           | Iroko, Sapele, hardwoods, miscellaneous species                                   | Plywood production for export to China and Europe (new plant in Angola)                 |
| <b>Importer-04</b> | Papua New Guinea and China | Balsa                                                                             | Plantation-grown balsa boards for wind turbine blades                                   |
| <b>Importer-05</b> | Zhangjiagang               | Okoumé                                                                            | Okoumé board offcuts; supplies to finger-jointing plants                                |
| <b>Importer-06</b> | Zhangjiagang               | Zebrawood, Okoumé                                                                 | Board import and trading                                                                |
| <b>Importer-07</b> | Zhangjiagang               | Zebrawood, Yellow Rosewood, Okoumé                                                | Timber import, drying/processing, sales to furniture manufacturers                      |
| <b>Importer-08</b> | Zhangjiagang               | Bubinga, Zebrawood, Red Zebrawood, Zingana, South American Teak, Okoumé           | African board import/export                                                             |
| <b>Importer-09</b> | Zhangjiagang               | Okoumé, Ozigo                                                                     | Board import and trading                                                                |
| <b>Importer-10</b> | Jiangsu                    | Sapele                                                                            | Log and board import (own forest & plant in RoC); specializes in Sapele                 |
| <b>Importer-11</b> | Zibo, Shandong             | Ozigo, Andoung, Zingana, Fiji Walnut                                              | Board import and trading                                                                |
| <b>Importer-12</b> | Wenzhou, Zhejiang          | Okoumé, Tali, Okan, Azobe, Padauk, Sapele, West African Rosewood, Yellow Rosewood | Log import; sells to distributors and end factories                                     |

#### These are common findings during the interview:

##### 1) Universal Market Contraction

Every single importer reported shrinking demand over the past three years. This is not a matter of opinion but a consistent factual observation across all interviews.

The decline is driven primarily by the real estate downturn, which has suppressed demand for new furniture and home decoration. Six importers noted that downstream customers are ordering less frequently and in smaller volumes. Importer-06 (Zhangjiagang) stated bluntly: "No species is selling well." Another (A company from Jiangsu, Importer-10) observed that as the furniture sector declines, more timber species are being forced into low-value applications like chopping boards and tea trays — a clear sign of demand deterioration.

The economic environment has weakened consumer confidence. Five importers reported that people are simply spending less on furniture and home improvements. Importer-05 noted that when inventory builds up and they need to recover working capital, they are sometimes forced to sell at

a loss. This reflects the severity of the demand contraction: even leading suppliers are experiencing margin compression so severe that they cannot break even on some sales.

## 2) Red-Colored Timbers Are Losing Aesthetic Appeal

Species like Sapele, Okoumé, and various red hardwoods are experiencing a structural decline in consumer preference. This is not merely a cyclical trend but appears to be a generational shift.

Young consumers (ages 25 to 40) are the primary driver of this change. They prefer the clean, understated aesthetics of North American species, particularly Black Walnut for high-end applications and White Oak for mid-range. Three importers noted that young consumers are simply unfamiliar with African timber species because they are less well-known than North American alternatives. This is a branding problem as much as a quality problem.

The implications for African red timbers are stark. Their "aesthetic appeal has disappeared" among younger home decor consumers, according to Importer-01. However, their practical value remains — they are still used in traditional Chinese-style projects, engineering and construction, and low-end practical categories. One importer described this as "engineering-grade staples due to hardness and low cost", in other words, they have been downgraded from desirable decorative materials to functional commodities.

## 3) Chronic Supply Chain Instability

Unstable delivery lead times is the most frequently cited operational challenge. This manifests in several ways:

First, the rainy season in African producer countries affects harvesting and transportation. Six importers noted that delivery volumes decrease during rainy months, and some have had to extend delivery timelines in contracts to avoid defaults. One importer described a specific case where rainy season caused road paralysis, which combined with local labour strikes, delayed agreed delivery times. When the goods eventually arrived, the market price had dropped, and the customer cancelled the order.

Second, Importer-08 mentioned that many suppliers do not have their own forest concessions. They buy logs locally from various sources, process them, and then export. This creates significant reliability issues, suppliers fail to perform according to contracts, including failing to deliver the agreed quantity and reneging on agreed prices. One importer identified this as one of their top three headaches: some suppliers "do not have their own forest concessions and buy logs locally before processing," which introduces uncertainty at every stage of the supply chain.

Third, there is a fundamental mismatch between supply and demand in terms of batch consistency. Customers who require consistent quality for high-end products often find African timber lacking compared to North American alternatives. One importer noted that "batch consistency" is a major concern for high-end custom requirements, and when African timber fails to meet these standards, customers switch to North American species.

## 4) Rising Export Taxes from African Countries

9 out of 12 importers complained about the steady and aggressive increase in export taxes imposed by African producer countries. This is not a minor cost pressure, it is fundamentally changing the economics of the trade.

Gabon was mentioned most frequently, with 4/12 importers noting that the government raises export taxes by approximately 5% annually. This erodes margins in an already weak market. One importer described the dynamic: Gabon government raises taxes → import prices rise → market demand shrinks → inventory builds → forced to sell at a loss to recover working capital. This is a self-reinforcing cycle of decline.

Beyond Gabon, 6 importers noted that African countries more broadly are increasingly using export taxes as a revenue tool, and many have imposed log export bans or quota systems that restrict the flow of raw materials. These policies may be intended to encourage domestic processing, but from the importers' perspective, they simply make African timber less competitive. Importer-10 from Jiangsu specifically asked for "appropriately relaxing the log and sawn timber export quota ratio" because they prefer to import logs, which are more versatile, can be processed differently, and can be sold more quickly to downstream customers without tying up working capital.

Five importers also noted that the combination of rising export taxes and weak domestic demand creates a "double squeeze": costs go up while prices customers are willing to pay go down. This dynamic is forcing many importers to operate at a loss or exit the market altogether.

### 5) Extreme Price Volatility

High price volatility is a universal pain point that makes business planning nearly impossible. 5 importers described price swings of dramatic magnitude.

The most striking example is Small Zebrawood (also known as Wenge or Kevazingo). According to one importer, this species experienced several price cycles driven by trade fairs and promotional events: it peaked at 12,000 RMB/m<sup>3</sup> during boom periods (2018, 2022, 2024) and then crashed to 5,000–6,000 RMB/m<sup>3</sup> during downturns. This is a price swing of more than 50%, which creates enormous risk for importers who must commit to purchase orders months in advance.

Similarly, Sapele lumber prices dropped from 7,000–8,000 RMB/m<sup>3</sup> to approximately 5,000 RMB/m<sup>3</sup> over the past three years, according to 3 importers. This decline reflects both weakening demand and increased competition from alternative timber sources.

Price volatility is not only driven by market demand but also by supplier behaviour. Three importers noted that suppliers sometimes renege on agreed prices when market conditions change, creating further uncertainty. One importer specifically cited "failure to perform according to contracts, including price" as one of their top frustrations.

The consequence of this volatility is that importers cannot confidently set prices for their downstream customers, and they struggle to manage inventory risk. If prices drop after they have committed to a purchase, they may be forced to sell at a loss. This is particularly acute for smaller importers with limited working capital.

### 6) No Domestic Demand for Certification

No importer reported any meaningful domestic customer demand for FSC or other sustainability certification. This is one of the most striking findings and has profound implications for any strategy that relies on certification as a market differentiator in China.

For the domestic market, certification is simply not a factor in purchasing decisions. Chinese consumers do not ask about sustainability, legality, or certification. They do not pay attention to these issues. Six importers stated this bluntly: "Domestic customers have no demand," "Domestic consumers pay little attention to legality and sustainability," and "The domestic market does not require certification."

The only demand for certification comes from export-oriented customers — those who are re-exporting finished goods to Europe (for EUDR/EUTR compliance) or the United States. Even then, the demand is limited to specific transactions. As Importer-02 noted: "If downstream customers re-export to Europe, FSC and EUDR/EUTR documents are required... If they only sell in China, no documents or certifications are required."

Even when export customers request certification, certified sources are often scarce. One importer noted that "even when foreign customers have demand, certified sources are scarce." Another importer echoed this: "even with foreign demand, certified sources are scarce."

The lack of domestic demand means that certification has no market value in China. It is seen as a cost of doing business with international customers, not as a competitive advantage in the domestic market. This has important implications: any strategy that positions certification as a value proposition for Chinese buyers is unlikely to succeed.

Four importers noted that if the product is ultimately consumed in China, there is no reason to pursue certification. This is a rational response to market realities. As one importer put it: "Consumers don't need it, so downstream customers don't require it."

### 7) Competition from Papua New Guinea (PNG) and North America

African timber is being squeezed from both ends of the market, creating a competitive pincer movement. PNG and other South Pacific timber (Solomon Islands, Fiji) competes aggressively on price. Three importers provided specific comparisons: the most expensive PNG lumber is under 3,000 RMB/m<sup>3</sup>, while the cheapest African lumber starts at 3,000 RMB/m<sup>3</sup> (e.g. Okoumé). This is a significant price difference that makes PNG timber attractive for cost-sensitive applications.

Beyond price, PNG timber has other advantages. Shipping distances are shorter — PNG timber reaches China in about one week, compared to one to two months from Africa. Some PNG countries still allow log exports, which gives importers more flexibility in processing and allows them to avoid the costs associated with processing in the source country. The ability to import logs rather than

lumber is particularly valuable because logs can be processed to meet specific customer requirements, whereas lumber is fixed in its dimensions.

Five importers reported that downstream customers are switching to PNG timber because of these cost advantages. An importer was blunt: "African timber has no irreplaceability — more downstream customers are switching to PNG." Another importer noted that customers are switching "to cheaper PNG timber" because of cost pressures.

North American timber (particularly Black Walnut, White Oak, and Red Oak) competes on brand recognition, quality consistency, and perceived prestige. Chinese consumers are familiar with North American species and perceive them as more premium. This is a branding advantage that African timber lacks.

Three importers noted that young consumers prefer North American species because they are "better known" and have a more modern aesthetic. African timber, by contrast, is associated with "old-fashioned" redwoods and traditional Chinese-style furniture. This is not just a matter of taste — it reflects a fundamental brand deficit.

North American timber also benefits from consistent grading standards and quality control. African timber, by contrast, suffers from inconsistent grading, variable batch quality, and a lack of unified standards. This makes it difficult for African timber to compete in high-end applications where batch consistency is critical. As one importer noted, "high-end custom requirements for batch consistency" are a key reason customers switch to North American species.

The competitive pressure from North American timber is intensifying. One Qingdao company (an end buyer, not an importer, but relevant here) noted that North American timber prices have risen sharply (White Oak from 5,000 to 8,000–9,000 RMB/m<sup>3</sup> over the past one to two years), which may create an opportunity for African timber to capture price-sensitive customers who would otherwise buy North American species. However, this opportunity will only be realized if African timber can address its quality and consistency issues.

#### 8) China's Regulatory Environment

Chinese laws and policies pose virtually no barrier to importing African timber. Seven importers confirmed this across all interviews. China has maintained zero tariffs on African timber for years, with no meaningful customs, forestry, or environmental restrictions. One importer stated plainly: "Chinese laws and regulations have had no impact on African timber imports." Another echoed: "They pose no challenge to us whatsoever." Two importers noted that China recently expanded zero-tariff treatment to all African products—further liberalizing access.

Importers commonly mentioned the following documents:

- Certificate of Origin
- Phytosanitary Certificate
- Original Bill of Lading
- Legal forest land title / forestry agreement signed with the government / logging approval (mainly at the African local stage)
- CITES certificate (only for listed species; rarely mentioned in the interviews)
- EUDR geolocation files (only requested by a small number of customers exporting to Europe)

Chinese regulation only appears in export-oriented supply chains. When downstream customers re-export finished goods to Europe (EUDR/EUTR) or the United States (FSC), certification and documentation become relevant. But if the product stays in China, "no documents or certifications are required." This distinction is critical: China's regulatory demands are passive—they originate from end-markets abroad, not from domestic law.

No interviewee from any company explicitly mentioned "CITES" or "endangered species protection" during the interviews, none endangered species protection were raised by any interviewee in any interview.

#### 9) Negative Outlook with Some Nuance

8 out of 12 importers expect continued shrinkage over the next two years. This is not a hopeful outlook. Five importers described the market as "continuing to shrink," "demand likely to shrink further," and "expected to continue shrinking."

However, there is some nuance in the outlook. Importer-01 from Guangzhou offered the most sophisticated perspective: the future of African timber "will not be about volume and scale, but about quality, compliance, stability, and added value." They described a market trend of "flat total volume, price volatility, elimination of low-end players, high-end premium growth, compliance-driven outcomes, and upgraded processing." In their view, African timber "remains the most core and irreplaceable mid-range solid wood system in China" — a position that may be maintained even as the overall market contracts.

Importer-05 from Zhangjiagang offered a conditional optimism: if prices remain at current levels, Okoume demand may still grow. Importer-07 from Zhangjiagang predicted that African timber "will not be eliminated, but not overly optimistic either."

One Qingdao company (an end buyer, not an importer, but relevant here) provided an external perspective: North American timber prices are rising rapidly, and this may create an opportunity for African timber. However, they also noted that African timber faces significant trust issues in the market because some merchants have used ordinary African timber to counterfeit high-end redwood at inflated prices, "losing consumer trust."

### 2.2.2 End-buyer interviews

The interviews were carried out in July and August 2026 as part of a broader market research. The primary goal was to gather firsthand, qualitative insights into how African timber is perceived, sourced, and utilized in China, and to identify the challenges and opportunities facing this trade.

The six interviewed companies are diverse, spanning multiple regions, business models, and product categories. This diversity provides a comprehensive, 360-degree view of the market's current state.

Geographic Distribution of these companies:

- Rizhao city, Shandong – End buyer-01 (redwood furniture, whole-home customization)
- Qingdao city, Shandong – End buyer-02 (export-oriented solid wood furniture)
- Jiangmen city, Guangdong – End buyer-03 (flooring and whole-home customization)
- Benxi city, Liaoning – End buyer-04 (new Chinese-style and American-style furniture)
- Shengzhou city, Zhejiang – End buyer-05 company (antique-style furniture)
- Suzhou city, Jiangsu – End buyer-06 (garden and classical architecture)

African Timber Species Discussed:

The most frequently mentioned African species include Okoume (*Aucoumea klaineana*, 奥克榄), Sapele (*Entandrophragma cylindricum*, 沙比利), Small Zebrawood (*Paraberlinia bifoliolata*, 塞鞋木豆, commonly known as 小斑马), African Rosewood (*Pterocarpus* spp., 花梨木), Chicken-foot Wood (*Millettia* spp. and *Cassia siamea*, 鸡翅木), Tali (*Erythrophleum* spp., 格木, commonly known as 非洲菠萝格 or 塔利), Bati (*Nauclea diderrichii*, 黄胆木, commonly known as 巴蒂), Okan (*Cylicodiscus gabunensis*, 圆盘豆, commonly known as 奥坎), Azobe (*Lophira alata*, 红铁木), and Padauk (*Pterocarpus soyauxii*, 红花梨). These are used across a wide range of applications, from structural beams and outdoor decking to furniture.

*Note: For several species, the names commonly used in the Chinese timber trade are commercial or colloquial terms. The scientific names and standard Chinese names provided above are based on wood science literature and national forestry standards.*

Other Competing Timber Sources: For context, interviewees compared African timber with materials from other regions, including:

- Southeast Asia: Teak (*Tectona grandis*, 柚木), Rubberwood (*Hevea brasiliensis*, 橡胶木), Taun (*Pometia pinnata*, 番龙眼, commonly known as 唐木), and various species referred to locally as Nyatoh.
- North America: Red Oak (*Quercus rubra*, 红橡), White Oak (*Quercus alba*, 白橡), Black Walnut (*Juglans nigra*, 黑胡桃), and Cherry (*Prunus serotina*, 樱桃木).
- South America: Cumaru (*Dipteryx odorata*, 二翅豆, commonly known as 龙凤檀), and Red Xang (likely *Myroxylon balsamum*, known as 红檀香 in Chinese trade, though the exact species requires further verification).

- Domestic Chinese Wood: Elm (*Ulmus* spp., 榆木), Birch (*Betula* spp., 桦木), Ash (*Fraxinus* spp., 水曲柳), Chinese Toon (*Toona sinensis*, 椿木), Pine (*Pinus* spp., 松木), Poplar (*Populus* spp., 杨木), and Paulownia (*Paulownia* spp., 泡桐).

#### These are common findings during the interview:

##### 1) The "Aesthetic Revolution"

The most significant finding from all interviews is a profound and ongoing shift in consumer preferences, which is reshaping the entire timber market.

**From Red to Light:** There is a clear and decisive move away from "red-toned" and dark-colored woods, which were historically favored for traditional Chinese furniture. Consumers, particularly the younger generation (25-40), now prefer lighter, natural wood tones and "log-colored" finishes, according to 4 end-buyers.

**From Complex to Minimalist:** The consumer preference has shifted from ornate, heavy, and complex classical furniture to simple, modern, and multifunctional designs. The "New Chinese Style" (新中式) attempts to bridge this gap but often still competes with the more established American and Nordic aesthetics.

**From "Wood Only" to Material Blends:** There is a growing acceptance and preference for non-wood materials, including marble, slate, and wrought iron, as alternatives to solid wood in furniture, further eroding the demand for traditional timber.

**From Wood Grade to "Face" (颜值):** For many younger consumers, the species of wood is less important than its visual appeal. Terms like "颜值" (appearance/face value) are used to describe what drives purchasing decisions. The focus is on color uniformity, minimal color variation, and a smooth, contemporary finish. This has led even large companies like End buyer-03 to explore "technological wood" (科技木) to meet these aesthetic demands with engineered consistency.

##### 2) Economic Pressures and Price Sensitivity

**A Downward Spiral:** The domestic timber market is described as being in its "twilight years" (黄昏年代), with the flooring and traditional furniture sectors experiencing up to 40% declines in sales.

**The Price Factor:** The current economic slowdown has made price a dominant factor. Even consumers with a preference for high-quality wood are constrained by budgets. As one interviewee from End buyer-04 put it, "If it exceeds the budget, no matter how good the quality, they won't buy it."

**Market Saturation:** The middle class, once the primary driver of high-end furniture consumption, is considered "saturated." They are no longer updating their furniture with the same frequency, while younger, first-time buyers are more focused on affordability.

##### 3) The Redwood Trust Issue

The market for traditional redwood (红木) is facing a crisis of trust. Consumers are becoming skeptical due to widespread counterfeiting and the misuse of names, where cheaper African species are mislabeled as premium redwoods. This has led to a collapse in consumer confidence and is a major factor driving the shift away from these species. This is particularly damaging to the perception of African timber, as End buyer-02 noted that it is often erroneously or deceptively lumped in with cheaper, lower-quality imitations.

##### 4) The Branding Challenge

**Perception of Value:** A clear hierarchy of perceived value exists in the minds of Chinese consumers and designers.

- **Top Tier:** North American Black Walnut and Cherry are seen as prestigious, premium woods favored by designers. They are associated with quality, clear grain, and a sophisticated aesthetic.
- **Mid-Tier:** North American Red and White Oak and traditional Southeast Asian Teak are perceived as reliable, high-quality workhorses with excellent stability and classic appeal.
- **Low-Tier:** African woods are often pigeonholed by End buyer-01, -02, and -04 as cost-effective but less prestigious. They are seen as a "good deal" or a budget-friendly substitute, rather than a premium choice. This stigma is a major barrier to entry into higher-margin markets.

The "African" Stigma: The geographic origin itself carries a negative connotation for some segments. A common refrain is that African wood is considered "not valuable enough" (不够名贵) or "of inconsistent quality" (质量参差不齐), creating a "stereotype" (刻板印象) that is difficult to overcome.

#### 5) Performance and Logistics: Critical Weaknesses

Physical Instability (The Primary Complaint): A complaint raised by three companies (End buyer-01, -02, -05) is the physical instability of many African species. Timber is reported to have a high rate of cracking, warping, and twisting, especially in the drier, highly variable climates of Northern China.

- End buyer-05 noted that while African wood has higher density than domestic wood, its stability is inferior to American Oak.
- End buyer-02 stopped using African wood (specifically Keruing) after 2-3 years due to excessive cracking and distortion in the northern climate, leading to unacceptably high return and repair rates.

Processing and Quality Control: African suppliers are criticized by End buyer-01 and End buyer-02 for a lack of standardization.

- Logs may be shipped with inconsistent dimensions (e.g., tapered ends).
- Grading and sorting are seen as inferior to the well-established systems of the U.S. timber industry, making it difficult for buyers to predict what they are getting. End buyer-01 specifically requested that suppliers "grade clearly (e.g., Grade A, B, C) and ship by grade per container."
- The long shipping times from Africa (often over a month) can lead to mold and degradation of the raw material before it even reaches the factory.

Supply Chain Opacity: Compared to the well-organized marketing and promotion of North American timber (e.g., trade missions organized by the Canada Wood Group), African timber supply chains appear more fragmented and less transparent. This makes it harder for Chinese buyers to establish long-term, reliable partnerships.

#### 6) A Stronghold in Specialized Niche Sectors

Despite the challenges in the furniture sector, African timber has a powerful and defensible niche in structural and outdoor applications. End buyer-06, a landscaping and garden architecture firm, is the most vocal advocate for African timber.

Unmatched Durability: Species like African Doussie are highly prized for their high density, straight grain, and exceptional resistance to rot, decay, and termites. This makes them ideal for outdoor decking, pergolas, pavilions, bridges, and garden furniture. They are viewed as a natural "anti-corrosion wood."

Structural Integrity: For load-bearing in pavilions and temples, large-diameter African logs are considered essential due to their strength and size.

Viable Alternative: For these applications, African wood is seen not as a budget option but as the most suitable and reliable material, even if it costs more than domestic pine or fir. This presents a stable and potentially growing market segment.

#### 7) Sourcing Channels and Criteria

End buyer-05 and End buyer-06 companies (especially the smaller ones) rely heavily on domestic trading companies and timber markets, mentioned by End buyer-05, -06. This makes them multiple steps removed from the source, leaving them reliant on intermediaries for quality, legality, and information. They are also reactive to market trends driven by these traders.

The key criteria for selecting a supplier are:

- Quality Stability: By far the End buyer-01 and End buyer-02 identified this as the most important factor.
- Price: A highly transparent and critical factor.
- Aesthetics: Color and grain pattern are key to final product marketability.
- Supply Stability: Avoiding interruptions in production is paramount.

Certification: A Tale of Two Markets. A stark divide exists between the export and domestic markets regarding sustainability certification.

- The Export Market: FSC certification is essential for export-oriented companies like End buyer-02, -03 to access European, American, and Japanese markets. It is not optional.
- The Domestic Market: For products sold within China, FSC certification is almost irrelevant.
  - No Consumer Demand: Five of the six companies (End buyer-01, -02, -04, -05, -06) reported that Chinese consumers have no idea what FSC is and do not ask for it.
  - No Price Premium: Customers (4/6) are unwilling to pay a higher price for certified wood. As End buyer-02 stated, "Certification doesn't bring sales."
  - No Awareness: End buyer-05 and End buyer-06 stated a lack of "consciousness" or "awareness" about FSC among their target market.

Legality: Gaining Traction. While FSC is a non-issue, the demand for basic legal documentation is growing.

- Common Documents: Requirements include legal import/export documentation, certificates of origin, and customs clearance forms. These are seen as proof of authenticity and legal source.
- Drivers: This demand is driven by:
  - A handful of more sophisticated end-consumers.
  - Competitive pressure (competitors will flag illegal imports).
  - The needs of export-oriented companies who use the same domestic supply chain for their export products.

## 3 Conclusion and recommendation

### 3.1 Conclusion

The regulatory environment further complicates the picture. While zero-tariff treatment has been extended to all African countries with diplomatic relations, logs and sawn timber are explicitly excluded, benefiting only deeper-processed wood products. Certification schemes such as FSC and CFCC hold negligible market value within China's domestic market, serving only export-oriented supply chains.

The findings are clear and sobering. Overall demand has contracted sharply: China's timber imports from COMIFAC fell by approximately 40% in value over the five-year period, driven by a prolonged housing market downturn, weak domestic consumption, and rising self-sufficiency from fast-growing plantation species such as eucalyptus and poplar. More significantly, the composition of trade has undergone a structural shift.

Interviews with importers reveal a market under severe strain: universal demand contraction, extreme price volatility, with Sapele down 29-39% and Zebrawood swinging by over 50%—rising export taxes, particularly Gabon's annual 5% increases, chronic supply instability, and intense competition from cheaper Papua New Guinea timber and premium North American species. Importers uniformly report no domestic demand for certification and express a pessimistic near-term outlook.

End-buyer interviews with furniture manufacturers and flooring companies add a critical qualitative dimension. A generational shift is underway: younger consumers (ages 25 to 40) are decisively moving away from red-toned and dark African hardwoods toward lighter, minimalist aesthetics associated with North American Black Walnut and White Oak. African timber is increasingly perceived as less prestigious and physically unstable, with high rates of cracking and warping in northern China's dry climate. Yet there is a countervailing strength: strong and growing niche demand exists for African timber in structural and outdoor applications—decking, pavilions, bridges, and garden furniture—where its density, rot resistance, and termite resistance offer irreplaceable value.

It is a transition. The African timber sector possesses the raw materials, the expertise, and the relationships to succeed in this new environment. What it needs now is the courage to change—and

the foresight to invest in a future where African timber is not a cheap substitute, but a valued choice. The opportunity lies not in selling more, but in selling better: through processing, quality assurance, brand building, and a clear focus on the segments where African timber's unique strengths are most appreciated.

## 3.2 Recommendations

### 3.2.1 For African Producers (Sawmillers, Exporters, Logging Companies)

These are actions that producers can directly implement in their own operations.

#### Short-Term Priorities (Realistically Implementable Within 1–2 Years)

##### 1) Grading standardisation and quality control

Invest in grading standardisation and quality control, because batch-to-batch inconsistency is the single most cited barrier to competing with North American timber in high-end applications (Importer-01, End buyer-01, End buyer-02). Producers should clearly grade logs and lumber (e.g., Grade A, B, C) and ship by grade per container, ensuring consistent dimensions and avoiding tapered logs (End buyer-01, End buyer-02). This is a short-term priority because it requires changes to internal sorting and labelling practices rather than new capital equipment or long research cycles.

##### 2) Species standardisation

Clarify and unify species names, because species names are easily confused in the market, making it difficult for buyers to identify and assess pricing (End buyer-02). Producers should avoid using confusing or multiple local names for the same species. This is a short-term priority because it is primarily a documentation and labelling change that can be implemented immediately.

##### 3) Process standardisation

Upgrade processing standards before export, because kiln-drying lumber before shipment would significantly improve stability and reduce the cracking and warping issues that plague African species in Northern China (End buyer-02, End buyer-05). End buyer-02 noted that U.S. Oak is preferred partly because it is already kiln-dried in the United States before export, ensuring greater dimensional stability. This is a short-term priority because kiln-drying capacity often already exists but is underused for export preparation.

##### 4) Compliance strengthening

Strengthen compliance documentation and traceability capabilities, because competitors will flag illegal imports and legal documentation is a matter of competitive pressure (End buyer-02, End buyer-03). Certificates of origin, customs clearance forms, and logging permits should be readily available (End buyer-01, End buyer-02, End buyer-03, End buyer-04). Compliance capabilities should go beyond CITES to serve both domestic and export markets (Importer-01). This is a short-term priority because the required documents already exist in most operations; the gap is consistency and readiness.

##### 5) Delivery schedule stabilization

Stabilise delivery schedules by managing rainy season impacts proactively, because unpredictable delays damage buyer confidence and disrupt procurement planning. Communicate transparently with buyers and build realistic lead times into contracts. This is a short-term priority because it is mainly a communication and planning improvement rather than a structural logistics investment.

Honour commitments, because non-performance and contract breaches damage trust and discourage repeat business (Importer-12, Importer-07). This is a short-term priority because it requires behavioural change rather than capital investment.

##### 6) Letter of Credit payment (LC payment)

Use LC payment where possible, because pre-payment requirements increase risk for Chinese importers and deter new partnerships (Importer-12). This is a short-term priority because it directly addresses a major obstacle to new buyer-supplier relationships.

### **Medium-Term Priorities (Realistically Implementable Within 2–3 Years)**

#### **1) Lighter-Coloured Species Development**

Develop lighter-coloured species with attractive grain, because multiple end buyers (End buyer-02, End buyer-04, End buyer-05) noted that African wood has "boring" or monotonous grain compared to North American Black Walnut and Oak, and younger Chinese consumers (ages 25–40) increasingly prefer lighter, natural wood tones over traditional red-coloured timbers. End buyer-04 specifically recommended developing species with lighter colour and more attractive grain patterns. This is a medium-term priority because species development, testing, and market acceptance require time.

#### **2) Niche product lines development**

Develop niche product lines for structural and outdoor applications, because African wood has a powerful and defensible advantage in applications where density and durability are paramount, such as outdoor decking, pavilions, bridges, and garden furniture. End buyer-06, a landscaping and garden architecture firm, views African timber as "natural anti-corrosion wood" with no viable alternative. This represents a stable and potentially growing market segment where African wood is seen not as a budget option but as the most suitable and reliable material. This is a medium-term priority because it requires product development, marketing, and buyer education.

#### **3) Shipping and logistics**

Improve shipping and logistics, because shipping times from Africa often exceed one month, leading to mould and degradation before the raw material reaches the factory (End buyer-04), and because African shipping lead times (1–2 months) are far longer than those of PNG/South Pacific competitors (1 week). Where possible, reduce shipping times and treat wood to prevent mould during long sea freight. This is a medium-term priority because it requires logistics partnerships and route optimisation.

#### **4) Brand building**

Invest in brand building to address the perception gap with North American timber, because Chinese consumers are simply unfamiliar with African species (Importer-02, Importer-08). This is a medium-term priority because perception change requires sustained effort.

Differentiate African timber from low-cost PNG/South Pacific alternatives by emphasising quality, stability, and value-for-money, because otherwise African timber competes only on price and loses its premium positioning. This is a medium-term priority because it requires consistent branding and market communication.

Address consumer trust issues caused by counterfeit redwood scandals, because consumers have been misled by fraudulent labelling, where cheaper African species are used to imitate premium redwoods, damaging the perception of all African timber (End buyer-02, End buyer-04). Promote transparency and authenticity. This is a medium-term priority because trust rebuilding takes time.

#### **5) B2B partnerships building**

Build direct B2B partnerships with Chinese end-buyers, because most companies, particularly smaller ones, rely heavily on domestic trading companies and timber markets in Zhangjiagang and Ningbo, leaving them multiple steps removed from the source (End buyer-05, End buyer-06). By contrast, End buyer-02 noted that the Canada Wood Group's trade missions to China successfully built direct supply channels that continue to this day. African producers should consider similar relationship-building efforts. This is a medium-term priority because relationship building and trust require repeated interaction.

#### **6) A long-term approach**

Take a long-term approach to the timber business, because short-term opportunism undermines stable trade relationships and market development (Importer-12). This is a medium-term priority because it requires a shift in business culture and planning horizon.

Jointly optimise the chain and overcome difficulties together, because the current market downturn affects all actors and coordinated action is more effective than isolated responses (Importer-07). This is a medium-term priority because it requires sustained collaboration across the value chain.

### **3.2.2 For ATIBT (Industry Association / Trade Promotion)**

#### **Short-Term Priorities (Realistically Implementable Within 1–2 Years)**

##### **1) Unify Grading and Species Names (Highest Priority)**

ATIBT should develop a voluntary grading and naming guideline for African timber species exported to China, encourage member companies to adopt standardised grade labels (e.g., premium, grade 1, grade 2) and species names on shipping documents, and pilot this with a small group of exporters and Chinese importers before wider rollout. This should be the top short-term priority because it directly addresses batch inconsistency (Importer-01, End buyer-01, End buyer-02), the lack of clear grades within the same batch (End buyer-01), and species name confusion that makes price determination difficult (End buyer-02). Because these problems are caused by the absence of a common reference framework rather than by production technology, they are the easiest to solve in the short term and would deliver immediate benefits to both producers and buyers. It requires no major capital investment, can be led by ATIBT itself, and directly addresses the most frequently cited commercial complaint from Chinese buyers.

##### **2) Standardise Compliance and Traceability Documentation**

ATIBT should develop a standardised documentation template covering legal logging permits, Certificate of Origin, Phytosanitary Certificate, and EUDR geolocation files where applicable; provide training to African producers on how to complete these documents consistently; and encourage Chinese importers to specify these requirements clearly in purchase contracts. This is a short-term priority because documentation requirements are already well defined in practice, and the main gap is consistency rather than new regulation (End buyer-01, End buyer-02, End buyer-03, End buyer-04). It is realistic within 1–2 years because it builds on existing documents and does not require changes to national laws, while directly supporting both market access and price stability.

##### **3) Stabilise Prices and Delivery Times Through a Communication Mechanism**

ATIBT should establish a regular price and delivery-time communication channel between major African exporters and Chinese importers, publish periodic market updates on export taxes, freight rates, and seasonal supply conditions, and facilitate early warning of policy changes (e.g., export tax increases) so that Chinese buyers can adjust procurement plans. This is a short-term priority because uncertainty, rather than the absolute price level, is what most damages buyer confidence and drives Chinese importers toward alternative sources such as PNG or North American timber (Importer-02, Importer-05, Importer-06, Importer-08, Importer-09, Importer-11). It is realistic within 1–2 years because it relies on information sharing and coordination rather than regulatory change, and ATIBT is well placed to act as a neutral broker.

#### **Medium-Term Priorities (Realistically Implementable Within 2–3 Years)**

##### **1) Product Development and Market Matching**

ATIBT should support the development of species with lighter colours and attractive grain to suit Chinese young consumers' preferences (End buyer-04, End buyer-05), and develop uses beyond furniture, such as garden ancient architecture and temples (End buyer-06). This is a medium-term priority because species development and market testing require time, but it addresses the long-term demand shift away from traditional dark red timbers.

## 2) FSC and Other Certification Promotion

ATIBT should promote FSC certification among African suppliers for export-to-Europe and high-end market demand (End buyer-02, End buyer-03), and help Chinese importers understand the value of certification. This is a medium-term priority because certification requires investment and capacity building, but it is essential for access to premium export markets and for differentiating African timber in markets where legality and sustainability are increasingly important.

## 3) Supply Chain Stability

ATIBT should work to reduce the impact of rainy seasons, geopolitics, and export tax changes on supply, and build a more stable supply chain. This is a medium-term priority because it requires structural improvements in logistics, planning, and policy coordination rather than quick fixes.

## 4) Brand Premium Building

ATIBT should help African timber build a high-end image in the Chinese market through quality, compliance, and stable supply, and change the stereotypes of "not prestigious enough" and "inconsistent quality" (End buyer-01, End buyer-02, End buyer-04). This is a medium-term priority because perception change requires sustained promotional and educational effort.

## 5) Long-Term Thinking and Credit System

ATIBT should encourage African suppliers to honour commitments and take a long-term approach (Importer-12, Importer-07), and build long-term cooperative relationships with Chinese importers. This is a medium-term priority because trust and credit systems take time to develop but are essential for reducing transaction risk and supporting stable trade.

### 3.2.3 For African Source-Country Governments (Policymakers, Forestry Ministries)

#### Short-Term Priorities (Realistically Implementable Within 1–2 Years)

##### 1) export tax

Stabilise export tax policies, because frequent increases (particularly Gabon's ~5% annual hikes) are the single most destructive policy from importers' perspective, eroding competitiveness and driving buyers toward alternative sources (Importer-05, Importer-08, Importer-11, Importer-09). This is a short-term priority because tax policy can be adjusted by government decision relatively quickly, and stability would immediately improve buyer confidence.

##### 2) Policy stabilization

Avoid frequent policy reversals, because importers cite unpredictability as a major deterrent (Importer-12, End buyer-06). This is a short-term priority because it requires policy discipline rather than new legislation.

##### 3) customs clearance processes

Accelerate customs clearance processes, because they are currently a bottleneck that adds cost and uncertainty (Importer-05). This is a short-term priority because process improvements can be implemented administratively.

Provide clear legal guidance on export requirements and avoid one-size-fits-all policies, because such policies do not reflect market demand and create uncertainty for buyers. This is a short-term priority because it is primarily a communication and administrative improvement.

##### 4) transparent and predictable enforcement of forestry regulations

Ensure transparent and predictable enforcement of forestry regulations, because arbitrary fees, inconsistent enforcement, and lack of policy continuity undermine confidence (Importer-10). This is a short-term priority because enforcement practices can be changed through administrative directives.

Strengthen anti-corruption measures, because importers specifically cited governance issues in the Republic of Congo (arbitrary fees, lack of transparency) (Importer-10). This is a short-term priority because it directly affects transaction costs and predictability.

### **Medium-Term Priorities (Realistically Implementable Within 2–3 Years)**

#### **1) log export bans**

Consider relaxing log export bans or quota systems to allow more flexibility, because importers prefer logs for their versatility and faster inventory turnover (Importer-10, End buyer-06). This is a medium-term priority because it requires balancing domestic processing objectives with trade policy.

Maintain stable log export policies, because while encouraging domestic processing is a legitimate policy goal, frequent or unpredictable restrictions on log exports disrupt supply chains (End buyer-06, End buyer-02). This is a medium-term priority because it requires a sustained policy commitment.

#### **2) better market intelligence**

Provide better market intelligence to producers on Chinese regulatory requirements, because these requirements are minimal and permissive, and producers often overestimate the burden. This is a medium-term priority because it requires building information channels and capacity.

#### **3) incentives to adopt international certification standards**

Create incentives for producers to adopt international certification standards (e.g., tax breaks or faster clearance for FSC-certified exports), because Gabon already does this and it encourages certification (End buyer-02, End buyer-03). This is a medium-term priority because it requires fiscal and administrative design.

Support FSC certification through incentives or subsidies, because FSC certification is required for access to premium export markets in Europe, America, and Japan, and governments can help producers capture this market by providing financial or technical support for obtaining certification (End buyer-02, End buyer-03). This is a medium-term priority because it requires budget allocation and institutional capacity.

## **Annex 1: Glossary of Abbreviations**

- AEO: Authorized Economic Operator
- ATIBT: Association Technique Internationale des Bois Tropicaux
- CITES: Convention on International Trade in Endangered Species of Wild Fauna and Flora
- COMIFAC: Central African Forests Commission
- CFCC: China Forest Certification Council
- CTWPDA: China Timber and Wood Products Distribution Association
- EUDR: EU Deforestation Regulation
- EUTR: EU Timber Regulation
- FOCAC: Forum on China-Africa Cooperation
- FSC: Forest Stewardship Council
- GAC: General Administration of Customs
- HS: Harmonized System
- NHLA: National Hardwood Lumber Association
- PEFC: Programme for the Endorsement of Forest Certification
- USDA: United States Department of Agriculture

- GIZ: Deutsche Gesellschaft für Internationale Zusammenarbeit
- TTT: Tropical Timber Trade Facility
- MOFCOM: Ministry of Commerce of the People's Republic of China
- FM: Forest Management
- CoC: Chain of Custody
- DDS: Due Diligence System
- CAR: Central African Republic
- DRC: Democratic Republic of the Congo
- PNG: Papua New Guinea
- EU: European Union
- US: United States
- WCO: World Customs Organization
- NFGA: National Forestry and Grassland Administration
- NDRC: National Development and Reform Commission
- RMB: Renminbi
- USD: United States Dollar

## Annex 2 Wood Species Mentioned

### 1. Sapele (*Entandrophragma cylindricum*)

Standard Chinese Name: 筒状非洲楝

Common Chinese Trade Name: 沙比利

Family: Meliaceae (楝科)

Common Origins: Tropical West and Central Africa. Regularly imported from Cameroon, Gabon, the Republic of the Congo, and the Democratic Republic of the Congo. The name originates from the city of Sapele in Nigeria.

Local Names: Sapelli (Cameroon), Aboudikro (Côte d'Ivoire), Assi, Dilolo (Gabon), Penkwa (Ghana), Ubilesan (Nigeria).

### 2. Okoume (*Aucoumea klaineana*)

Standard Chinese Name: 奥克榄

Common Chinese Trade Name: 奥克榄 / 奥古曼

Family: Burseraceae (橄榄科)

Common Origins: Tropical West Africa, primarily Gabon, but also found in Equatorial Guinea and the Republic of Congo.

### 3. Beli / Small Zebrawood (*Paraberlinia bifoliolata*)

Standard Chinese Name: 赛鞋木豆

Common Chinese Trade Name: 小斑马木 (commonly known as 小斑马)

Family: Fabaceae (豆科)

Common Origins: Tropical West Africa, primarily Cameroon and Gabon.

(Note: This species should not be confused with "Zebrawood" (*Microberlinia* spp., 小鞋木豆), which is a related but different timber).

4. Mahogany (*Khaya* spp.)

Standard Chinese Name: 卡雅楝

Common Chinese Trade Name: 非洲楝

Family: Meliaceae (楝科)

Common Origins: Widely distributed in West and South African rainforests. Mainly imported from Gabon, Cameroon, and the Republic of the Congo.

Local Names: Acajou, African mahogany, Lagos Wood.

Note: *Khaya* spp. is traded as "African Mahogany" but is not the true Mahogany genus (*Swietenia*). The name is widely accepted in commercial trade.

5. Ebony (*Diospyros* spp.)

Standard Chinese Name: 乌木

Common Chinese Trade Name: 乌木 / 黑檀

Family: Ebenaceae (柿树科)

Common Origins: Tropical Africa and Asia. Several species are found across West and Central Africa.

6. Wenge (*Millettia laurentii*)

Standard Chinese Name: 非洲崖豆木

Common Chinese Trade Name: 鸡翅木 (often grouped with other *Millettia* species)

Family: Fabaceae (豆科)

Common Origins: Central Africa, primarily the Democratic Republic of the Congo, Cameroon, and Gabon.

Related Species: *Millettia stuhlmannii* (斯图崖豆木) is also known as Panga-panga, a closely related and similar timber from East Africa.

7. Iroko (*Milicia excelsa* / *Milicia regia*)

Standard Chinese Name: 大绿柄桑 (also referred to as 绿柄桑)

Common Chinese Trade Name: 绿柄桑 (often called 非洲柚木 in trade)

Family: Moraceae (桑科)

Common Origins: Widely distributed across the west coast of tropical Africa.

8. Teak (*Tectona grandis*)

Standard Chinese Name: 柚木

Common Chinese Trade Name: 柚木

Family: Lamiaceae (唇形科)

Common Origins: Native to Southeast Asia (Myanmar, India, Thailand, Indonesia, Laos). Mainly imported from Myanmar. Also planted in tropical regions worldwide.

Local Names: Teak (Myanmar, India, Indonesia, Thailand), Jati (India), Kyun (Myanmar), Mai Sak (Thailand), Teak (Laos).

#### 9. Rubberwood (*Hevea brasiliensis*)

Standard Chinese Name: 橡胶木

Common Chinese Trade Name: 橡胶木

Family: Euphorbiaceae (大戟科).

Common Origins: Native to Brazil; widely cultivated in Southeast Asia (Malaysia, Indonesia, Thailand, Vietnam) and southern China (Hainan, Yunnan).

Local Names: Rubberwood, Para rubber tree.

#### 10. Taun (*Pometia pinnata*)

Standard Chinese Name: 番龙眼

Common Chinese Trade Name: 唐木

Family: Sapindaceae (无患子科)

Common Origins: Distributed in Southeast Asia and South Pacific. Regularly imported from Papua New Guinea, Malaysia, and Indonesia.

Local Names: Taun, Ohabu (Papua New Guinea), Kasai (Sabah, Sarawak, Solomon Islands, Indonesia, Myanmar), Sibuh (Sabah), Malugai (Philippines), Truong (Vietnam, Cambodia) .

#### 11. Red Oak (*Quercus rubra*)

Standard Chinese Name: 红栎

Common Chinese Trade Name: 红橡

Family: Fagaceae (壳斗科)

Common Origins: Native to eastern and central North America. Regularly imported from the United States and Canada .

Local Names: Red oak, American red oak, Turkey oak, Shumard oak.

#### 12. White Oak (*Quercus alba*)

Standard Chinese Name: 白栎

Common Chinese Trade Name: 白橡

Family: Fagaceae (壳斗科)

Common Origins: Native to eastern and central North America, from Canada to the Atlantic coast. Regularly imported from the United States and Canada.

Local Names: White oak, Garry oak, Swamp white oak, Overcup oak.

#### 13. Black Walnut (*Juglans nigra*)

Standard Chinese Name: 黑胡桃

Common Chinese Trade Name: 黑胡桃

Family: Juglandaceae (胡桃科)

Common Origins: Native to eastern North America. Regularly imported from the United States and Canada.

Local Names: Black walnut, Walnut, Eastern black walnut, American black walnut.

14. Cherry (*Prunus serotina*)

Standard Chinese Name: 櫻桃木

Common Chinese Trade Name: 櫻桃木

Family: Rosaceae (薔薇科)

Common Origins: Mainly distributed in North America and Europe. Imported from North America (mainly the United States) and occasionally from France.

Local Names: Sweet cherry, Cerisier (France), Wild cherry (UK), Kirsh, Kirsche (Germany), Kers (Netherlands).

15. Cumaru (*Dipteryx odorata*)

Standard Chinese Name: 二翅豆

Common Chinese Trade Name: 龙凤檀

Family: Fabaceae (豆科)

Common Origins: Native to northern South America, including the Amazon basin of Brazil, Peru, Colombia, and Guyana.

Local Names: Cumaru, Tonka bean. Note: All species of *Dipteryx* are listed in CITES Appendix II (effective November 2024).

16. Red Xang (*Myroxylon balsamum*)

Standard Chinese Name: 香脂木豆

Common Chinese Trade Name: 红檀香

Family: Fabaceae (豆科)

Common Origins: Native to Central and South America, including Panama, Nicaragua, Mexico, Paraguay, and other tropical regions.

Local Names: Balsam, Tolu balsam tree, Quina. Note: The Chinese trade name “红檀香” may refer to multiple species; further verification is recommended.

17. Elm (*Ulmus* spp.)

Standard Chinese Name: 榆木

Common Chinese Trade Name: 榆木

Family: Ulmaceae (榆科)

Common Origins: Widely distributed in northern, northwestern, and southwestern China. Mainly produced in Northeast China, North China, and the Yellow River basin.

Local Names: Elm, Chinese elm, Siberian elm (*Ulmus pumila*), Manchurian elm (*Ulmus manchurica*).

18. Birch (*Betula* spp.)

Standard Chinese Name: 桦木

Common Chinese Trade Name: 桦木

Family: Betulaceae (桦木科)

Common Origins: Widely distributed across China, mainly in Northeast China, North China, and the southwestern highlands. Also imported from Russia and Northern Europe.

Local Names: Birch, Asian white birch (*Betula platyphylla*), Manchurian birch (*Betula mandshurica*).

#### 19. Ash (*Fraxinus* spp.)

Standard Chinese Name: 水曲柳

Common Chinese Trade Name: 水曲柳

Family: Oleaceae (木犀科)

Common Origins: Mainly produced in Northeast China (Xiaoxing'anling and Changbai Mountains). Also imported from the Russian Far East, North America, and Europe.

Local Names: Manchurian ash (*Fraxinus mandshurica*), Northeast China ash, Water-curved willow (literal Chinese trade name) .

#### 20. Chinese Toon (*Toona sinensis*)

Standard Chinese Name: 香椿

Common Chinese Trade Name: 椿木

Family: Meliaceae (楝科)

Common Origins: Widely distributed in central, southern, and southwestern China. Mainly produced in the Yellow River and Yangtze River basins.

Local Names: Chinese mahogany, Chinese toon, Xiangchun (香椿).

#### 21. Pine (*Pinus* spp.)

Standard Chinese Name: 松木

Common Chinese Trade Name: 松木

Family: Pinaceae (松科)

Common Origins: Widely distributed across China. Main domestic species include Masson pine (*Pinus massoniana*) in South China, Yunnan pine (*Pinus yunnanensis*) in Southwest China, and Korean pine (*Pinus koraiensis*) in Northeast China. Also imported from Russia, New Zealand, Chile, etc.

Local Names: Pine, Masson pine, Yunnan pine, Korean pine, Scots pine (*Pinus sylvestris*).

#### 22. Poplar (*Populus* spp.)

Standard Chinese Name: 杨木

Common Chinese Trade Name: 杨木

Family: Salicaceae (杨柳科)

Common Origins: Widely distributed across China, from latitude 23°N to 53°N. Mainly produced in North China, Northeast China, and the Yangtze River basin.

Local Names: Poplar, Chinese poplar, Simon poplar (*Populus simonii*), Japanese poplar (*Populus maximowiczii*).

#### 23. Paulownia (*Paulownia* spp.)

Standard Chinese Name: 泡桐

Common Chinese Trade Name: 泡桐

Family: Paulowniaceae (泡桐科) Note: Some classifications place it in Scrophulariaceae (玄参科).

Common Origins: Mainly produced in North China, Central China, and East China, including Hebei, Henan, Shandong, Shanxi, and Shaanxi provinces.

Local Names: Paulownia, Empress tree, Foxglove tree, Kiri (Japanese).

24. Nyatoh (Palaquium spp.)

Standard Chinese Name: 纳托木

Common Chinese Trade Name: 金丝檀木、银丝木、春茶木

Family: Sapotaceae (山榄科)

Common Origins: Widely distributed from India through Southeast Asia to the Philippines, New Guinea, and the Western Pacific Islands. Commercial supply mainly from Malaysia (Sarawak, Sabah), Indonesia, and Papua New Guinea.

Local Names: Nato (Philippines), Nyatoh (Malaysia, Indonesia), Nyatau (Myanmar), Pencil cedar (Papua New Guinea), Chay (Vietnam), Jangkar (Sarawak), Koema (Indonesia)

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