



THE  
GLASS  
PALACE

A NOVEL

AMITAV GHOSH



# Myanmar & Teak

- No 1 in natural teak forests (50%)
- No 1 producer of teak logs (25%)
- No 3 in planted teak area (ca. 400,000 ha)



# Global Teak Trade in the Aftermath of Myanmar's Log Export Ban



**3<sup>rd</sup> World Teak Conference 2015, Guayaquil, Ecuador**  
Walter Kollert, FAO & Przemysław J. Walotek, WaKa Serviços de Investimentos Florestais



# Methodology

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- Official statistics of national customs departments
- HS code
  - 440349 other tropical roundwood
  - 440729 other tropical sawnwood
- Teak export data from Myanmar not available. Myanmar exports have to be assessed from imports of major teak importing countries



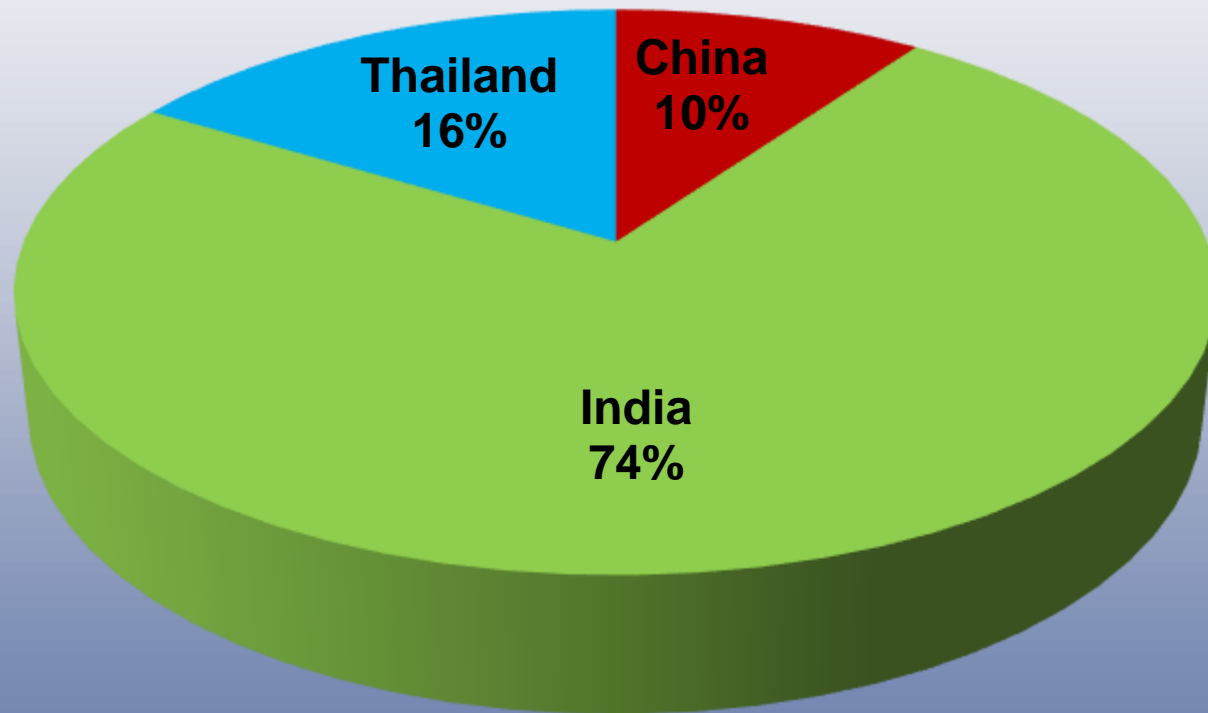
# 1) Trade Volume





# Global teak imports (avg. 2005-2014)

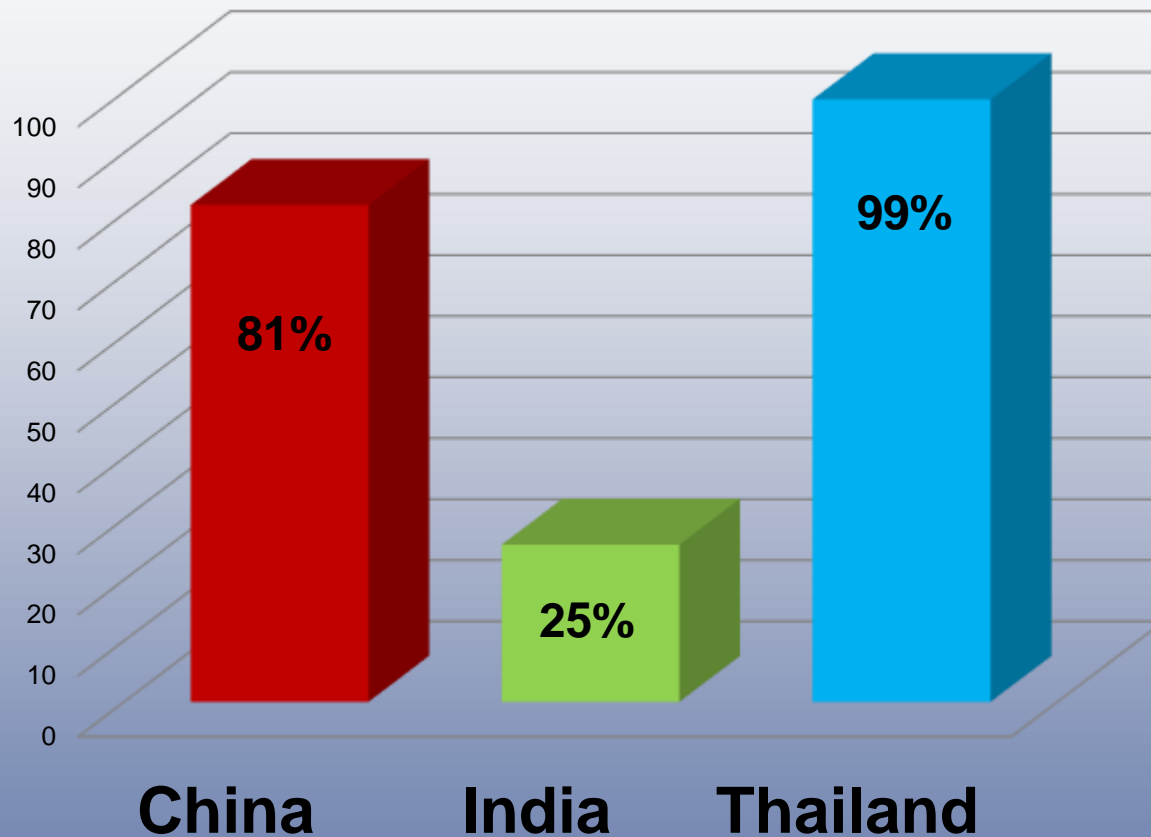
1.07 million m<sup>3</sup>/yr, 487 million USD/yr





# Share of imports from Myanmar

## 455,000 m<sup>3</sup> (43%)

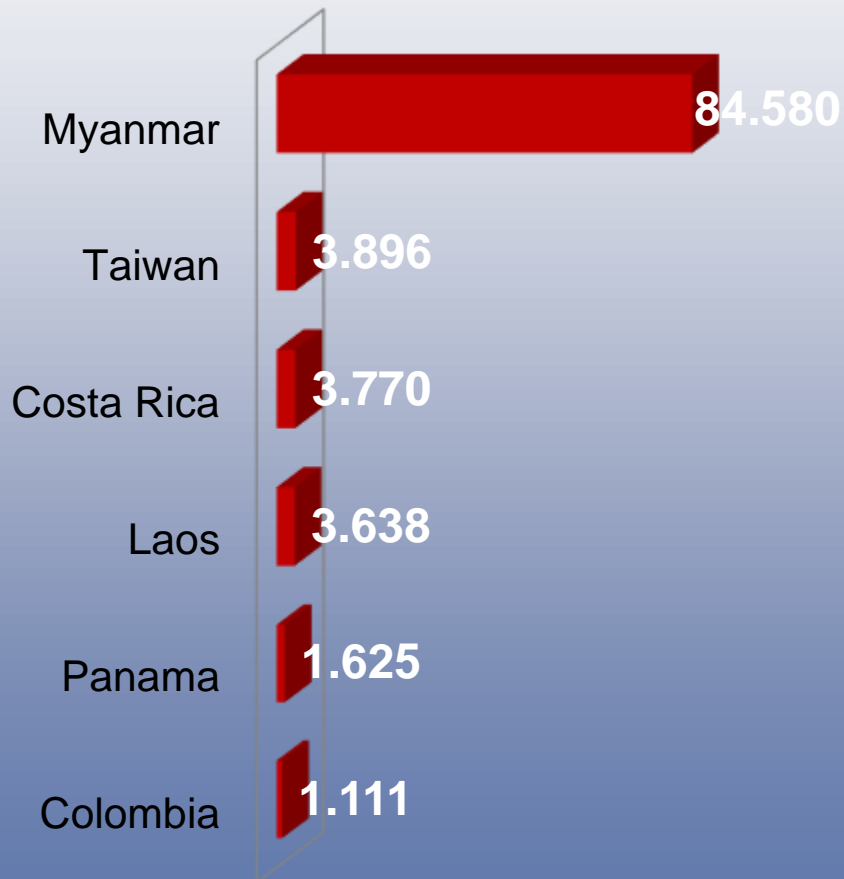




# Teak imports to ...(avg. 2005-2014)

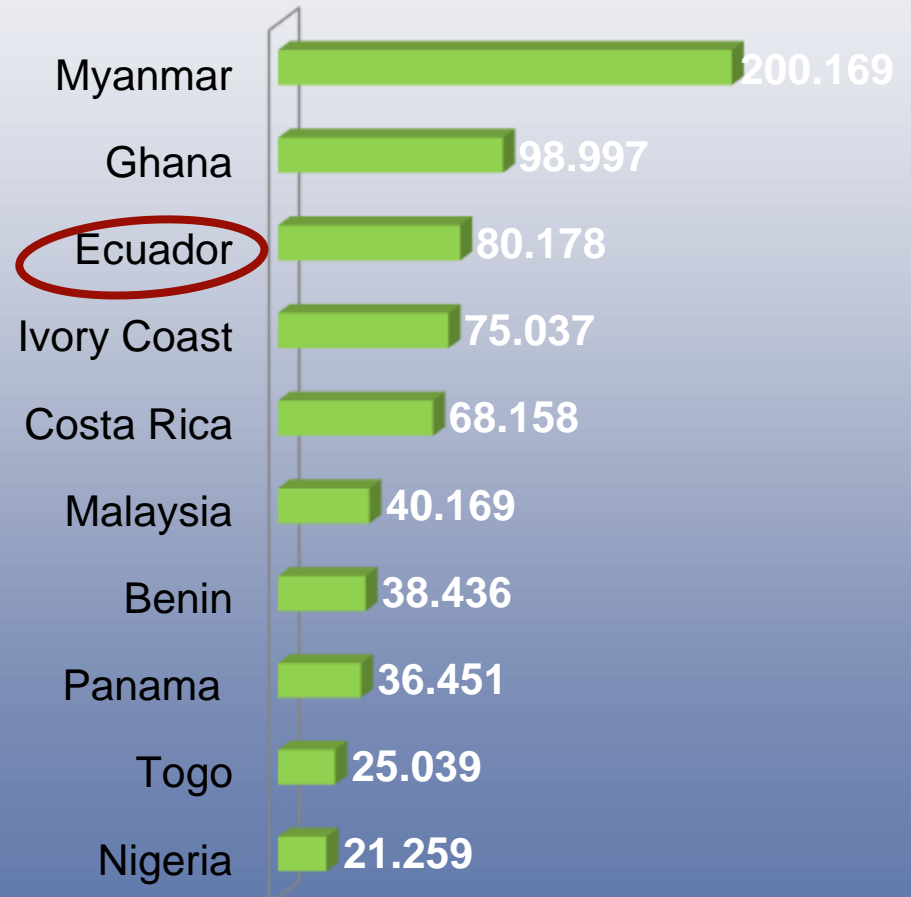
## China (m<sup>3</sup>/yr)

from 6 major countries (>1000 m<sup>3</sup>/yr)



## India (m<sup>3</sup>/yr)

from 10 major countries (> 20,000 m<sup>3</sup>/yr)

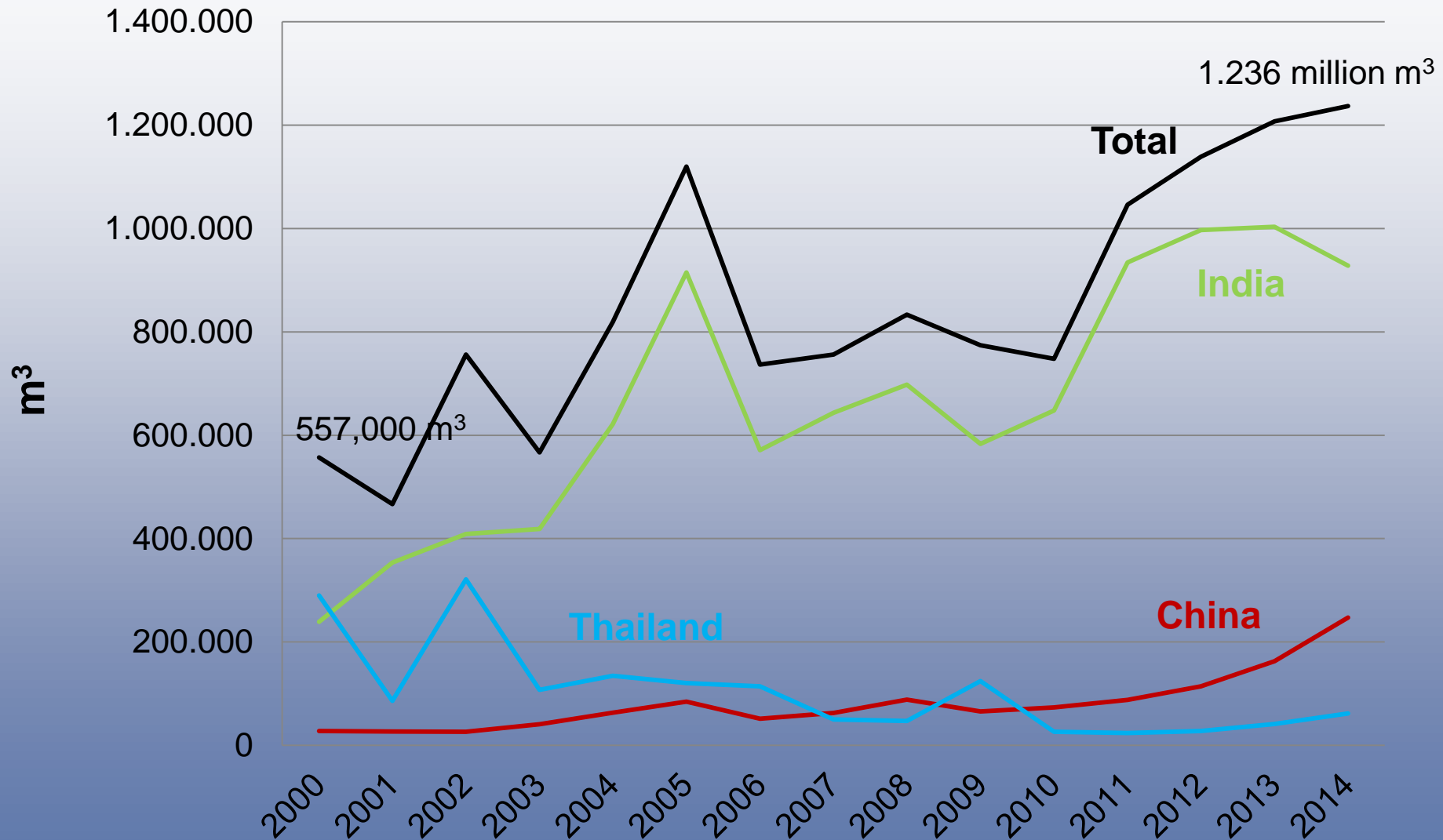






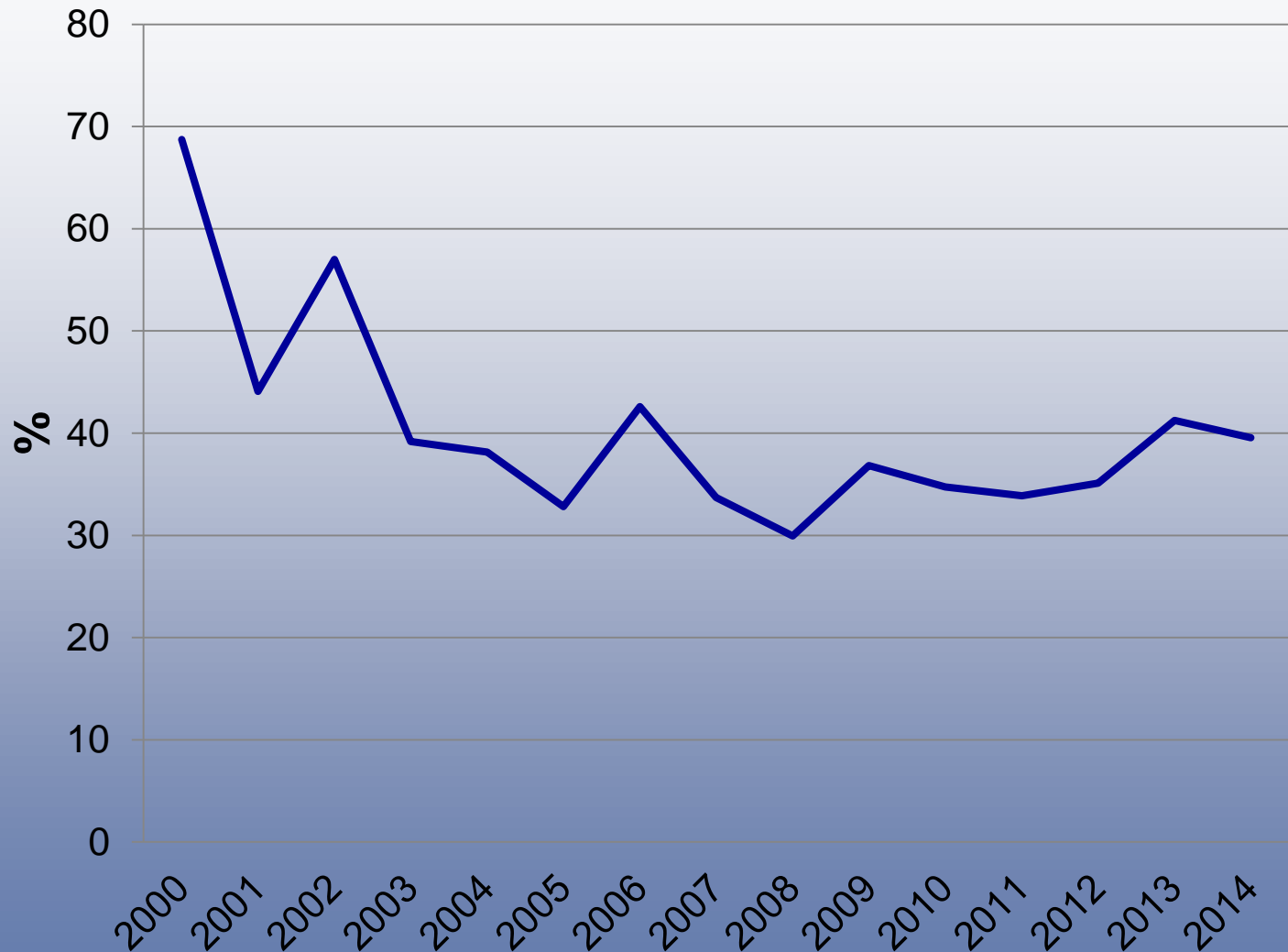
# Roundwood imports by major countries

## Trend 2000-2014



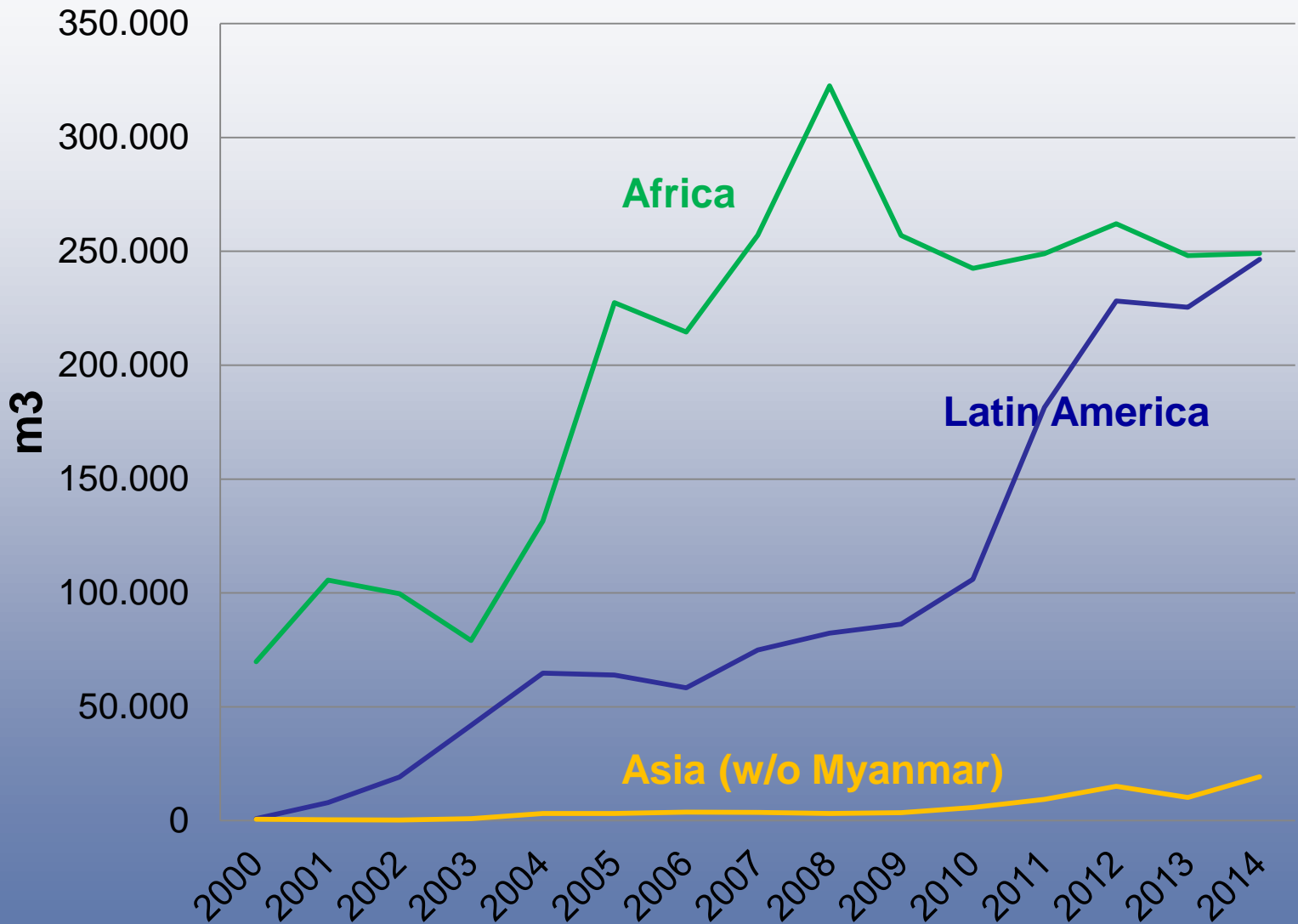


# Share of imports from Myanmar to China, India, Thailand, 2000-2014





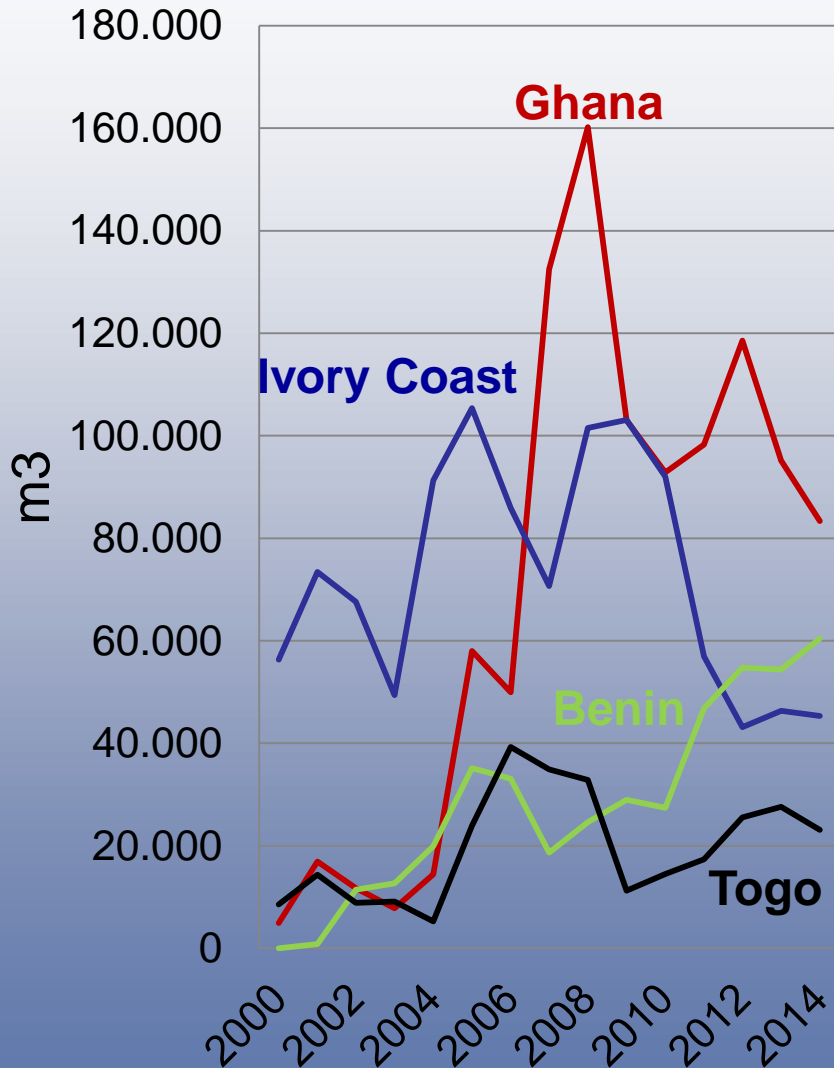
# Imports by China and India from Africa and Latin America, 2000-2014



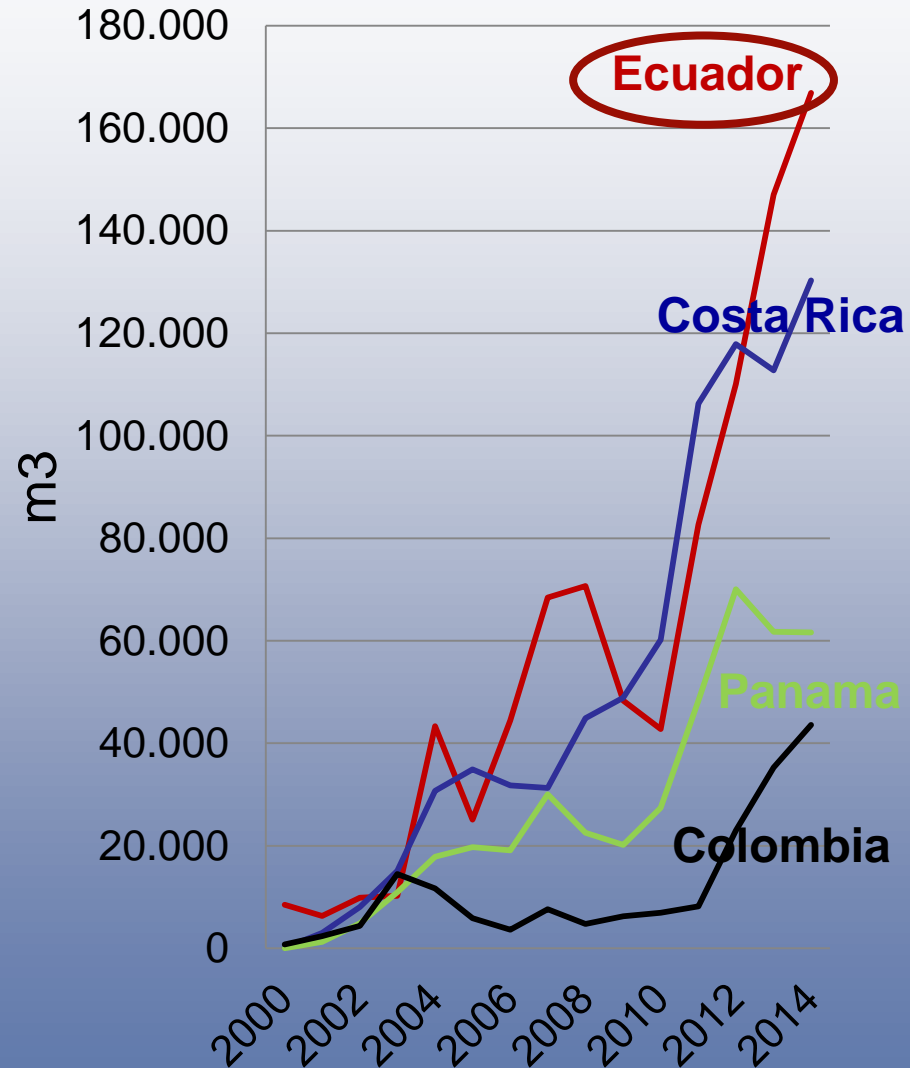


# Emerging roundwood traders

## Africa (2000-2014)



## Latin America (2000-2014)





## 2) Trade Value



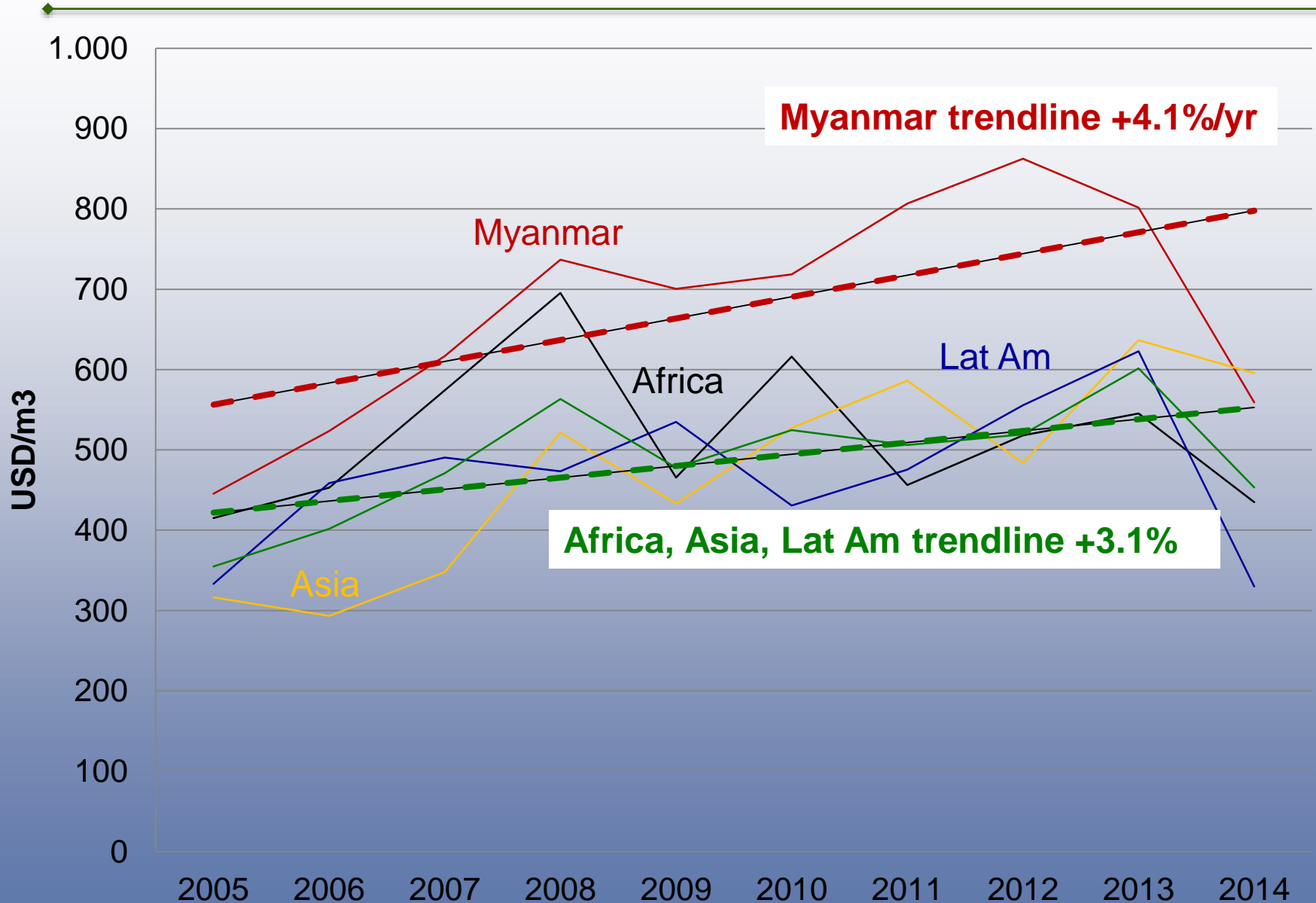
Plantation logs, Panama



Natural forest logs, Myanmar

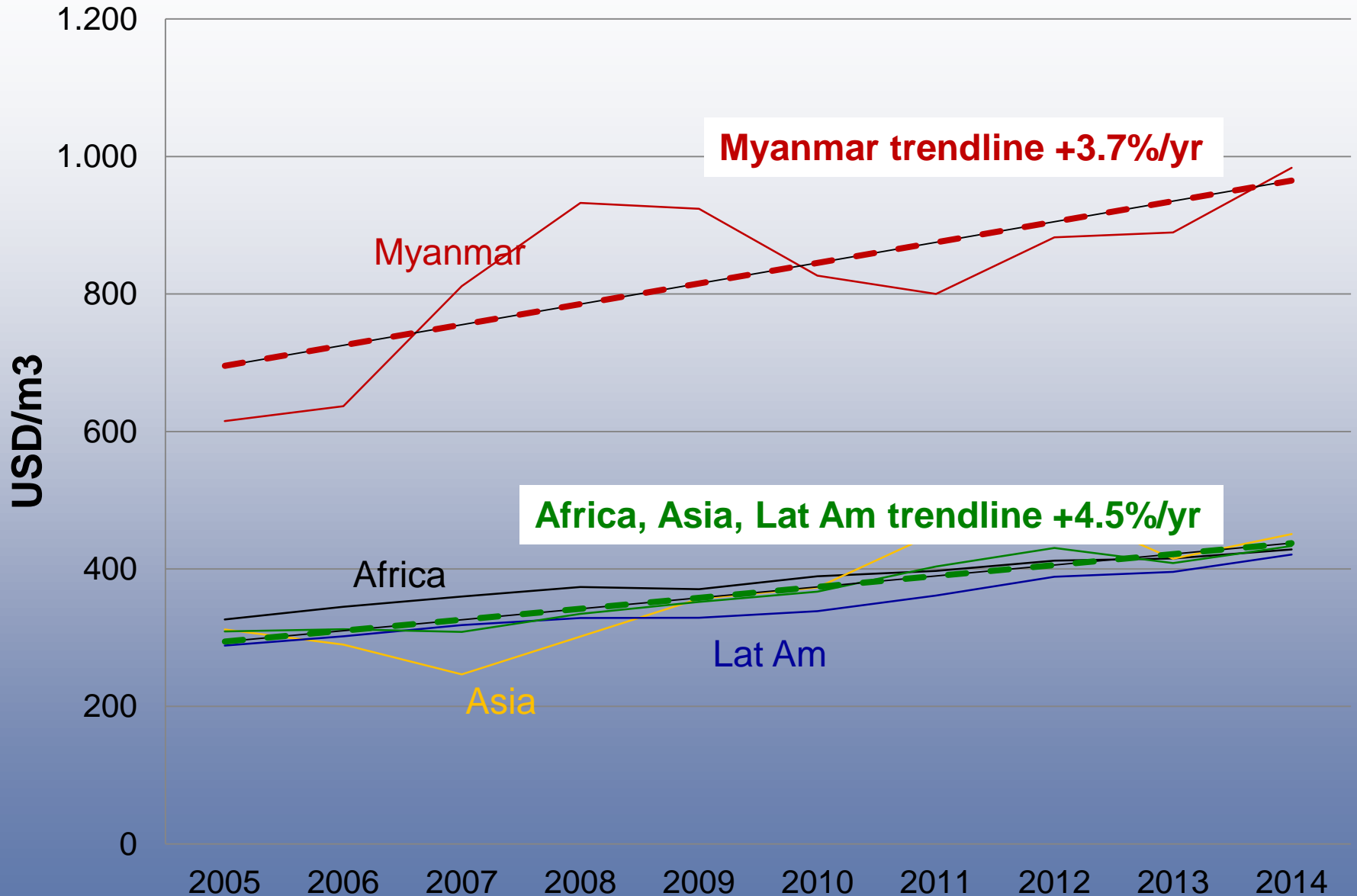


# Unit price of China imports 2005-2014





# Unit price of India imports 2005-2014





# 3) Log Export Ban







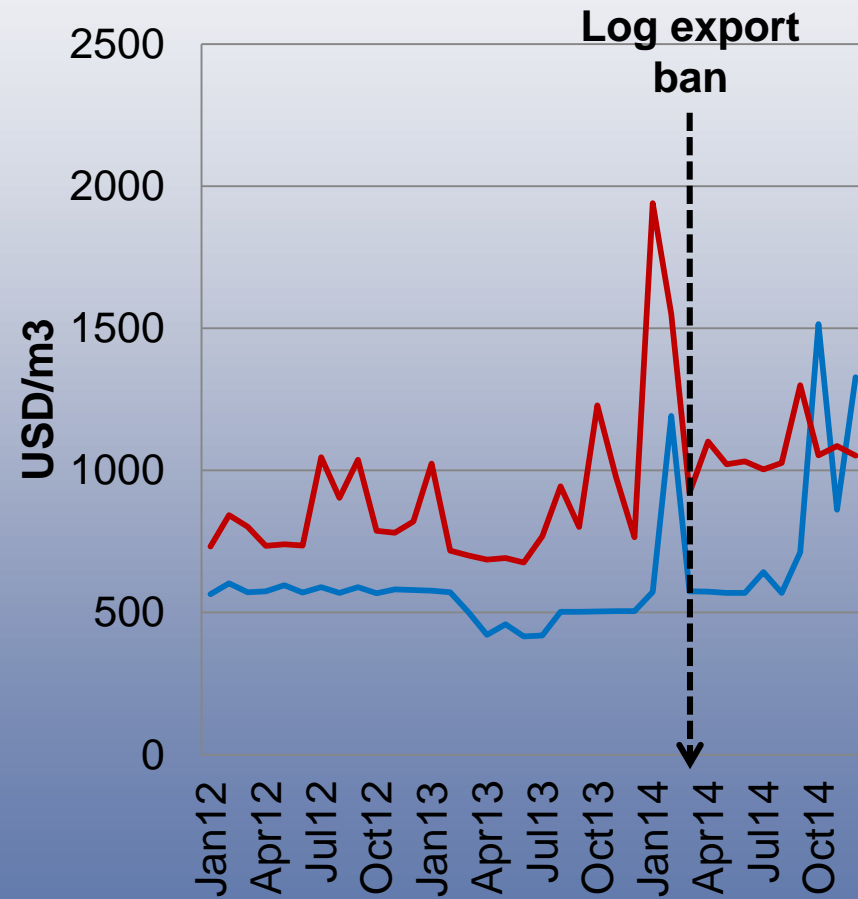
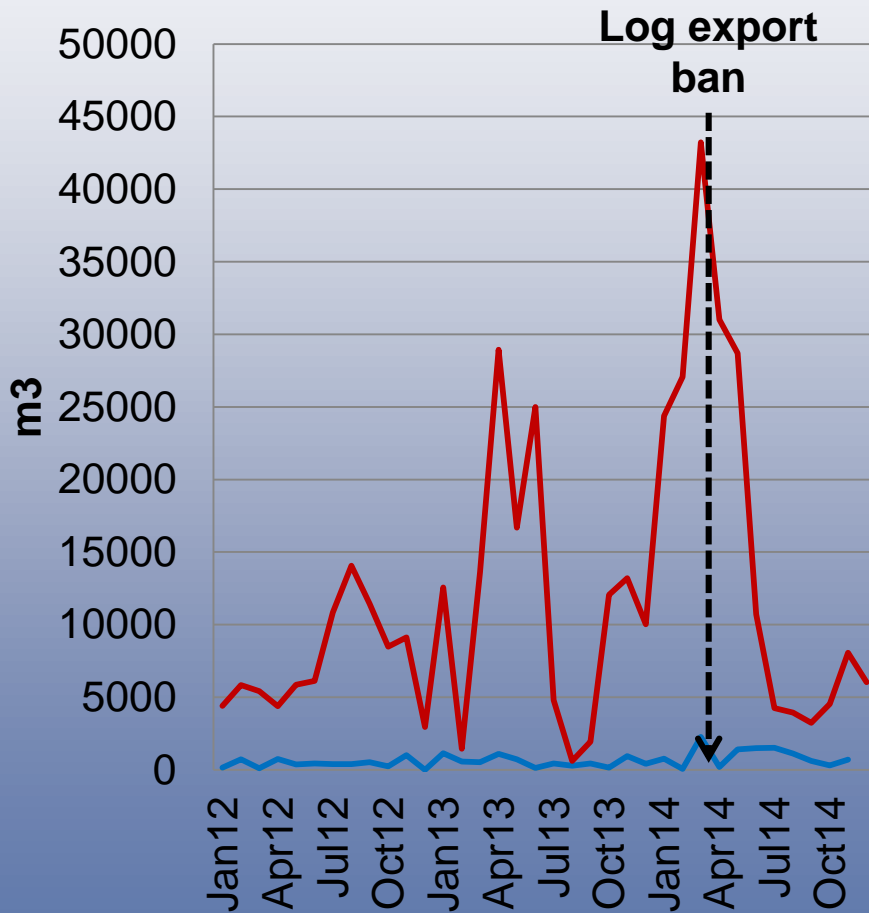
# China imports

## Jan 2012 to Dec 2014, by months

Volume

Myanmar  
Laos

Unit price





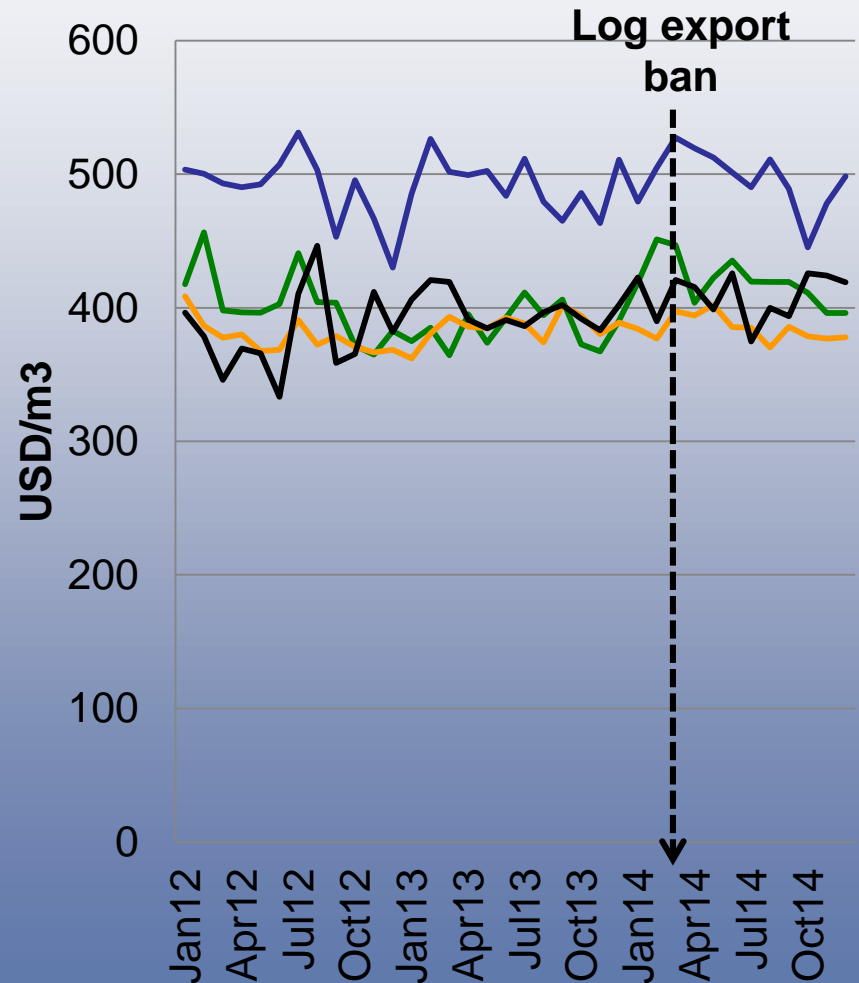
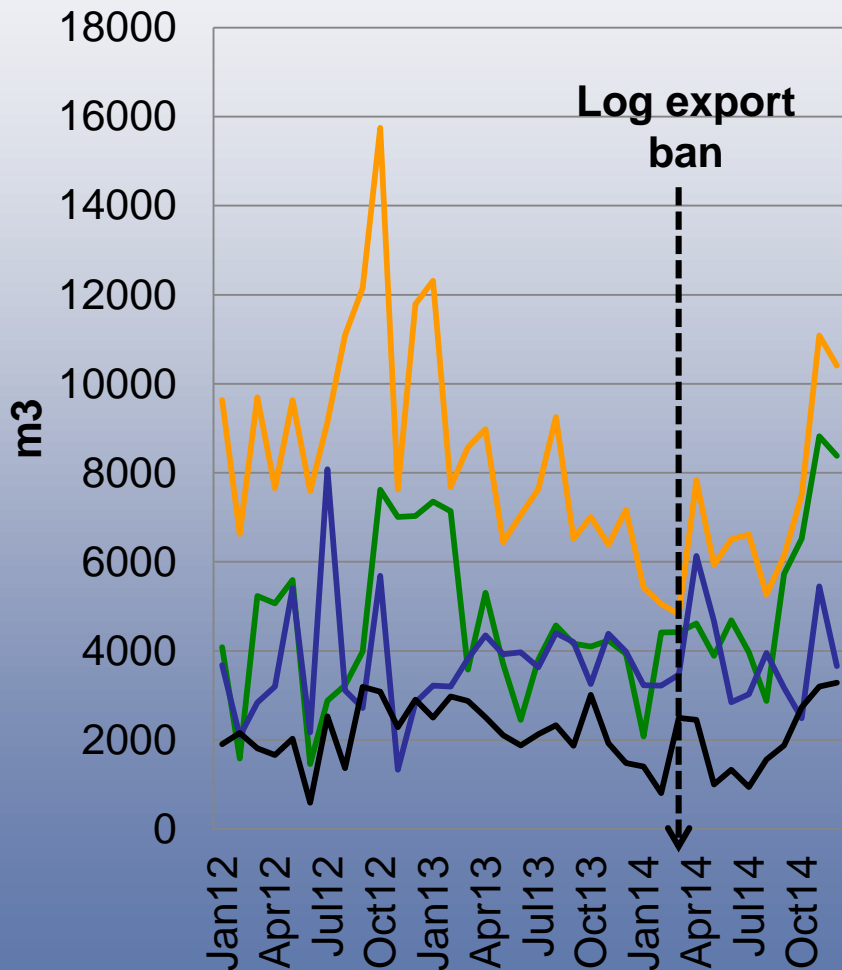
# India imports from Africa

## Jan 2012 to Oct 2014, by months

Volume

Ghana Benin  
Ivory Coast Togo

Unit price

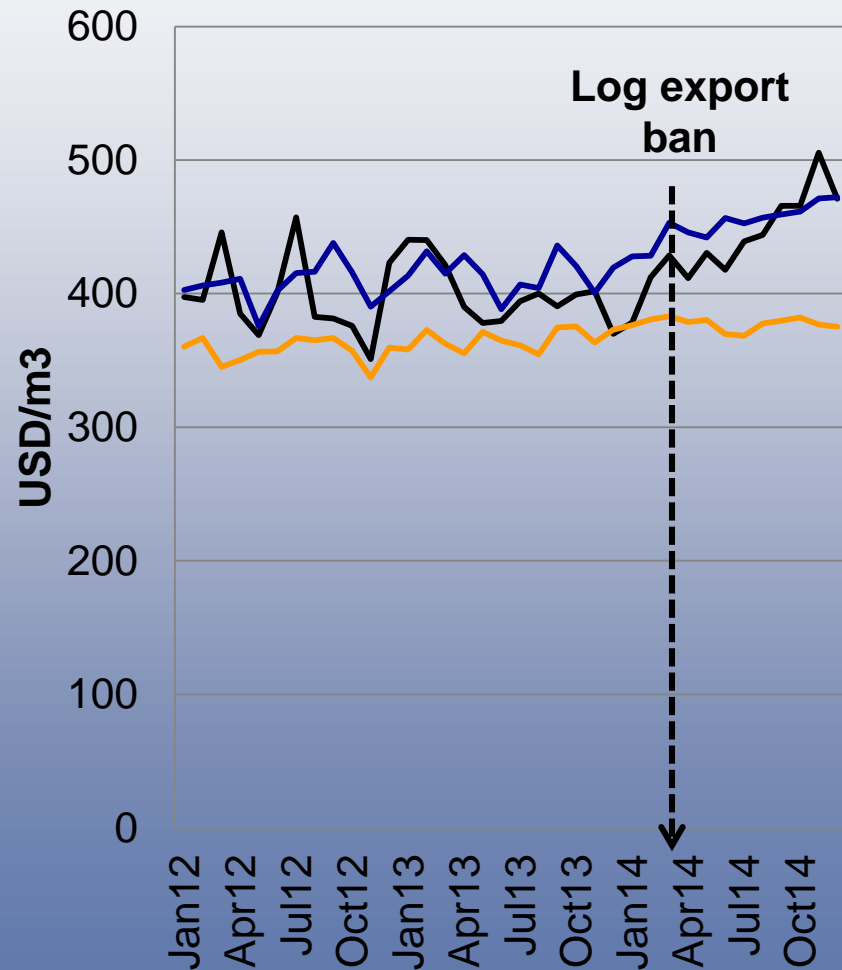
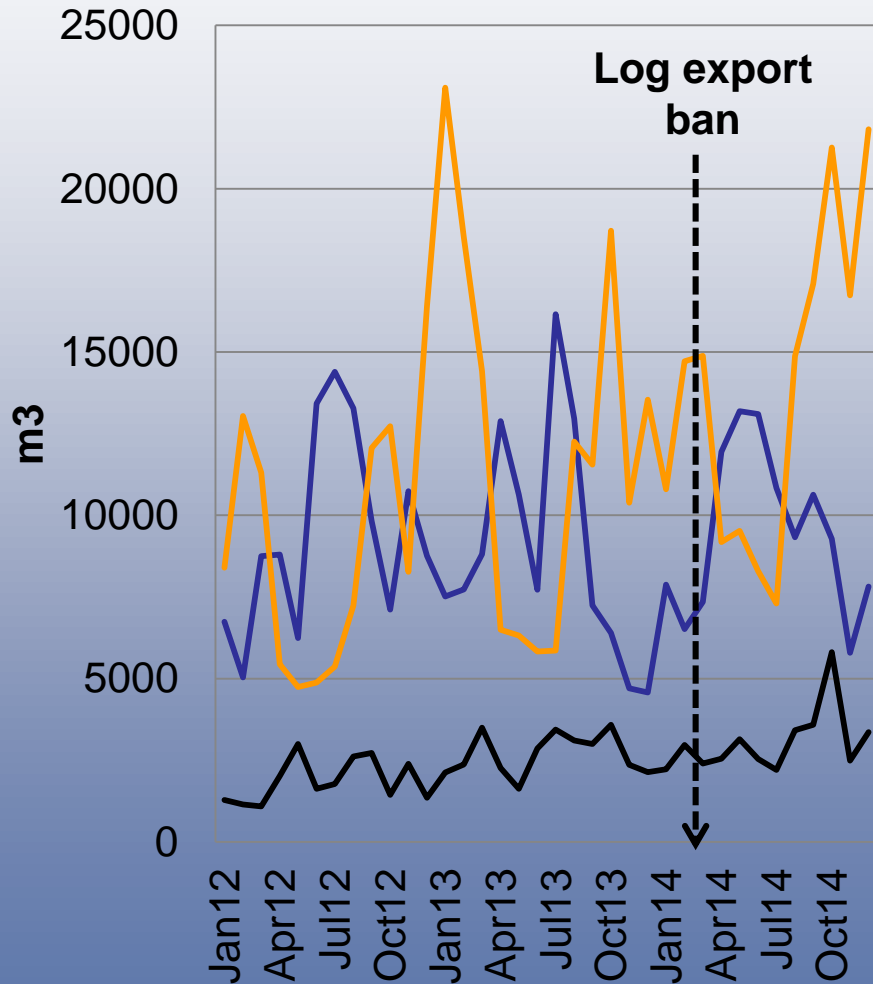




# India imports from Latin America

## Jan 2012 to Dec 2014, by months

**Volume** **Ecuador** **Colombia** **Costa Rica** **Unit price**





# Summary & Conclusions (1)

1. National customs data on teak imports according to HS (Harmonized System)
2. Myanmar is a teak heavyweight - impact of log export ban ?
3. Global trade in teak roundwood > 1 million m<sup>3</sup>/yr; dominated by India, China and Thailand
4. Trade volume more than doubled since 2000, trade value more than quadrupled
5. Emerging teak roundwood exporters:  
**Africa:** Ghana, Ivory Coast, Benin, Togo, Nigeria  
**Lat Am:** Ecuador, Costa Rica, Panama, Colombia



# Summary & Conclusions (2)

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6. Rise in prices: 3% to 4.5 % per year on average since 2005
7. Future belongs to teak plantations
8. Log export ban: different impact on imports into China and India



# Thank you for your attention !



3<sup>rd</sup> World Teak Conference (WTC3)  
Guayaquil, Ecuador, 12 May 2015