

Vietnam – Lao (Cambodia) Timber Trade 2012 - 2015



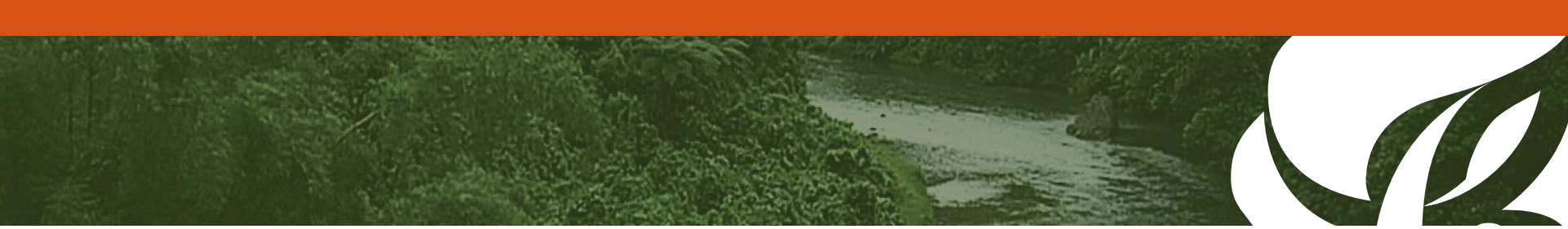
Forest Trade and Finance

Vientiane 23 February 2016

*To Xuan Phuc
Policy Analyst, Forest Trends
pto@forest-trends.org*

Agenda

- An ongoing initiative on custom data analysis
- Based on Vietnam customs data in 2012-2015)
- Overview
- Sawn wood
- Round log
- Timber species
- Major check points
- Some highlights



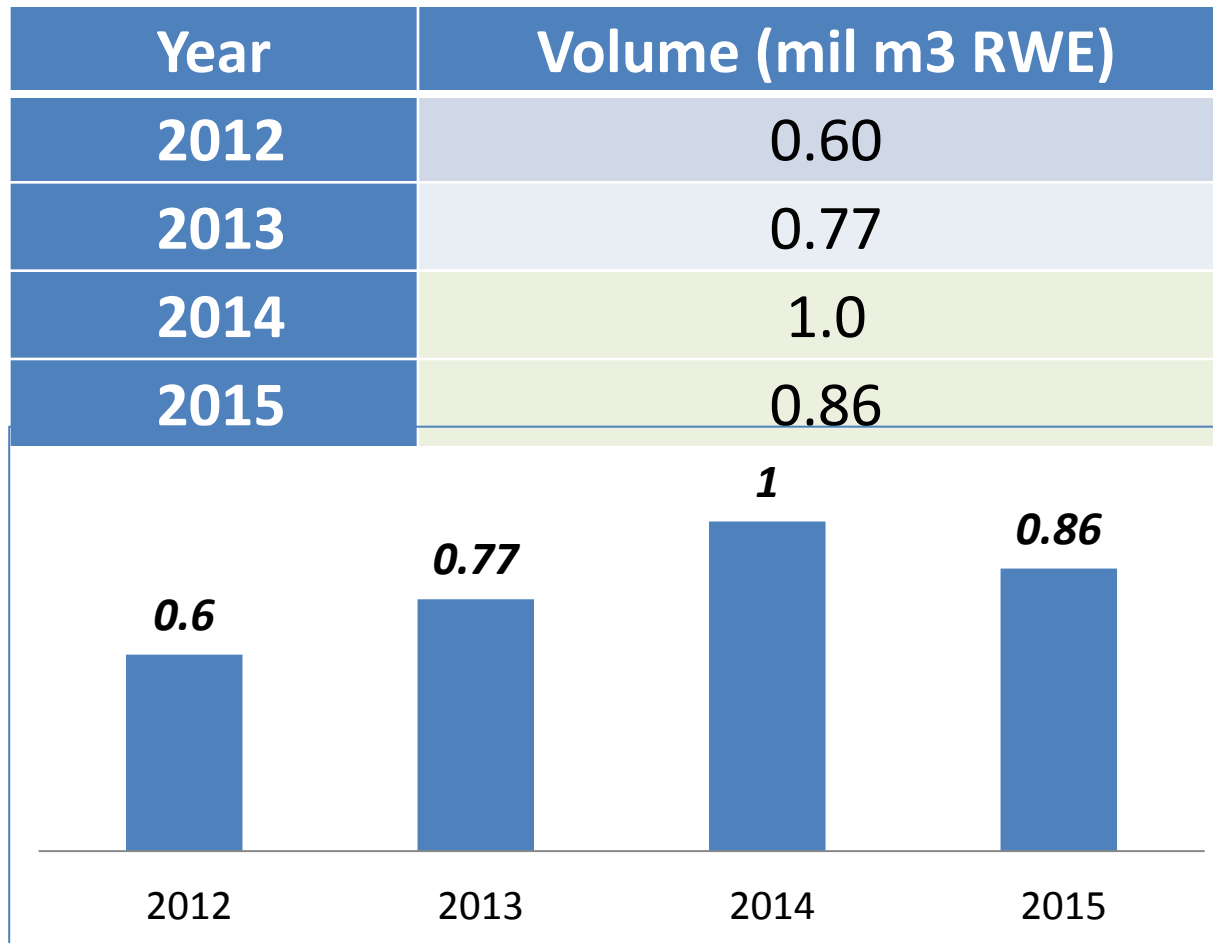
Vietnam – Laos Timber Trade 2012 – 2015

Overview: Value and Volume



Total		Sawn wood		Round log	
Year	Value (mil USD)	Volume (mil m3)	Value (mil USD)	Volume (mil m3)	Value (mil USD)
2012	283.2	0.28	207.6	0.2	74.3
2013	455.4	0.39	319.9	0.2	134.4
2014	559.8	0.50	410	0.31	149.5
2015	348.9	0.38	239.2	0.32	109.3

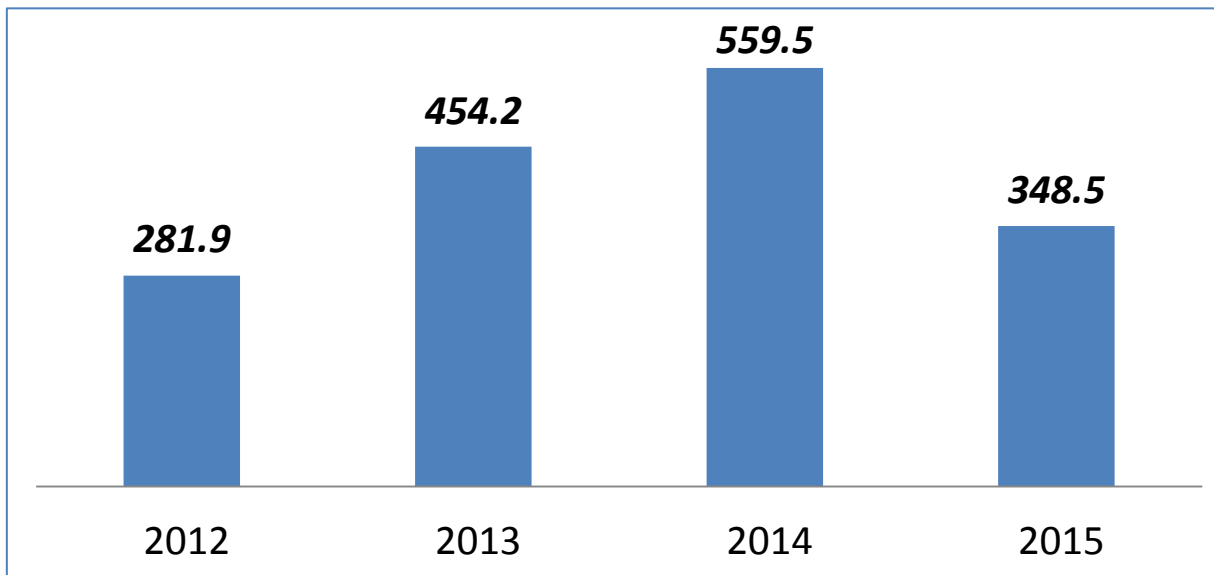
Overview: Volume



Overview: Value



Year	Value (mil USD)
2012	281.9
2013	454.2
2014	559.5
2015	348.5



Timber groups



A wide range of species belonging to 7 groups is imported to Vietnam from Laos; a large proportion of it is high value timber species belonging to groups 1-3)

Species from Group 1 imported to Vietnam from Laos (2015)



Vietnam	Laos	Thailand	Trade name	Scientific name	Plant family
Bách xanh			Chinese incense cedar, Yunnan c	Calocedrus macrolepis	Cupressaceae
Cẩm lai		ขงขน, ประดขงขน, เกดแดง, พยงแกลบ,	Burmese Rosewood, Palisander	Dalbergia oliveri	Leguminosae
Đinh hương				Syzygium aromaticum	Myrtaceae
Gỗ đỏ / Cà te		มะคาโม่ง	Ipil	Afzelia xylocarpa	Leguminosae
Gụ mật / gụ lau		มะคาแต, มะคาลง, มะคาหยม, มะคาหน	Sepetir, Memperas	Sindora siamen	Leguminosae
Hồng Tùng		สนสรอย	Sempilor	Dacrydium elatum	Podocarpaceae
Huê		ดาเสอขาว	Jarum-jarum	Dysoxylon loureiri	Meliaceae
Hương		ประด, ประดปา	Burma Padauk, Burmese rosewo	Pterocarpus macrocarpus	Leguminosae
Lát hoa		ยมหน, สะเดาข้าง, สะเดาหน, ยมขาว	Surian batu, Chittagong wood, ch	Chukrasia tabularis	Meliaceae
Mạ lay				Gigantochloa albociliata	
Mun		ตะโกสวน, ตะโกไทย, ปลาย, มะเขือเถอ	Black-and-white ebony, pale mo	Diospyros malabarica	Ebenaceae
Pơ mu			Fujian cypress	Fokienia hodginsii	Cupressaceae
Sa mu			Chinese fir	Cunninghamia konishii	Cupressaceae
Sơn huyết		รก, หรือ, รกใหญ่	Rengas	Melanorrhoea laccifera	Anacardiaceae
Trai		กนเกรา	Malabera, Tembusu	Fagraea fragrans	Loganiaceae
Trắc		พะยง, กระยง, ขะยง, ประดลาย, ประดเส	Siamese Rosewood	Dalbergia cochinchinensis	Leguminosae

Species from Group 2 imported to Vietnam from Laos (2015)



Vietnam	Lao	Thailand	Trade name	Scientific name	Plant family
Cà chắc		ประจต, ประเจก	Balau, Burma Sal, Siamese Sal, T	Shorea obtusa	Dipterocarpaceae
Cắm xe		แดง, จาลาน, กรอม, ตะกรอม, ปราณ, ไปร	Batal, Pyinkado	Xylia xylocarpa	Leguminosae
Kiến kiền		ตะเคียนรำก	Merawan	Hopea pierrei	Dipterocarpaceae
Lim xanh		not in Thailand	Indochina ironwood	Erythrophloeum fordii	Leguminosae
Mài lá					
Nghiến				Parapentace tonkinensis Gagnep	
Sao xanh		ตะเคียนหน, ตะเคียนหน, เคียนทราย	Giam, Malut; Chengal Batu	Hopea ferrea	Dipterocarpaceae
Song xanh					
Táu mật		สกกน	Resak (Malaysia and Indonesia)	Vatica odorata	Dipterocarpaceae
Xoay		เขลง, กาหย, หย, นางดา, หมากเคง	KerANJI, kerANJI kertas kecil	Dialium cochinchinense	Leguminosae

Species from Group 3 imported to Vietnam from Laos (2015)

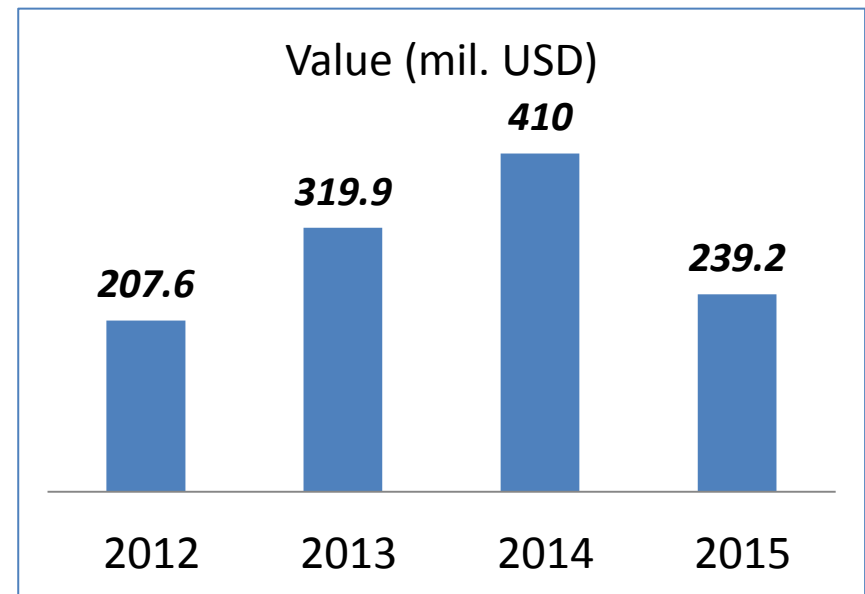
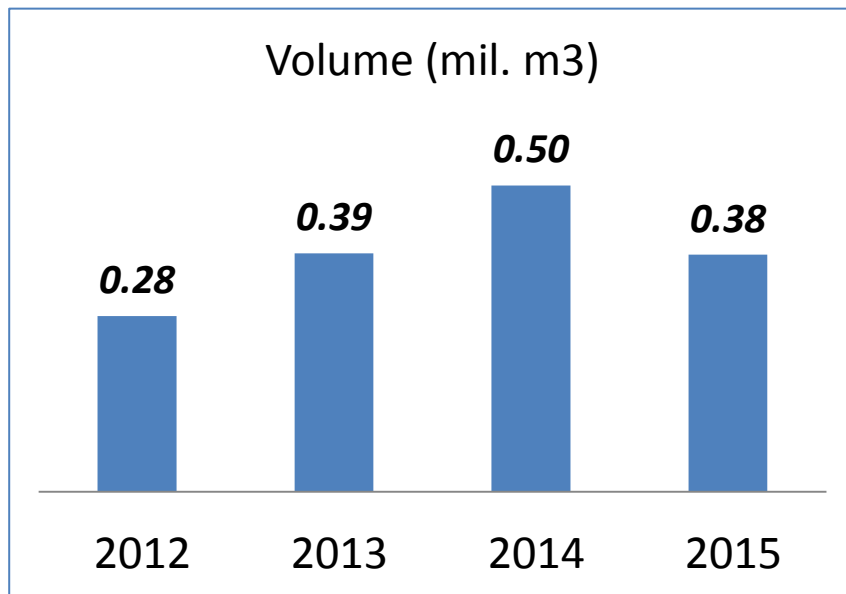


Vietnam	Lao	Thai	Trade name	Scientific name	Plant family
Bằng lăng		เปอญป่า	crape myrtle, Bungor (Malay), Ta	Lagerstroemia paniculata	Lythraceae
Chiêu liêu xanh		สมอไทย, สมออพยา, หมากเนาะ, มาแน	Ketapang, Terminalia Chebula	Terminalia tomentosa	Combretaceae
Chò chỉ		ไผ่เขียว, หรอขมนดา	White Seraya, Gerutu	Parashorea stellata	Dipterocarpaceae
Chua khét				Chukrasia sp	
Dạ hương				Cestrum nocturnum Linn.	
Dâu		ตะคร้อ, คอ	Akota, Kusum tree, Ceylon oak	Schleichera trijuga, Schleicher	Sapindaceae
Huỳnh		ข้มแพรก	Dungun, Mengkulang (Malay), Cl	Tarrietia javanica, Heritiera jav	Sterculiaceae
Sến		พะยอม, พะยอมดง, คะยอม, พะยอมทอ	White Meranti	Shorea roxburghii	Dipterocarpaceae
Tếch		สัก	Teak	Tectona grandis	Verbenaceae

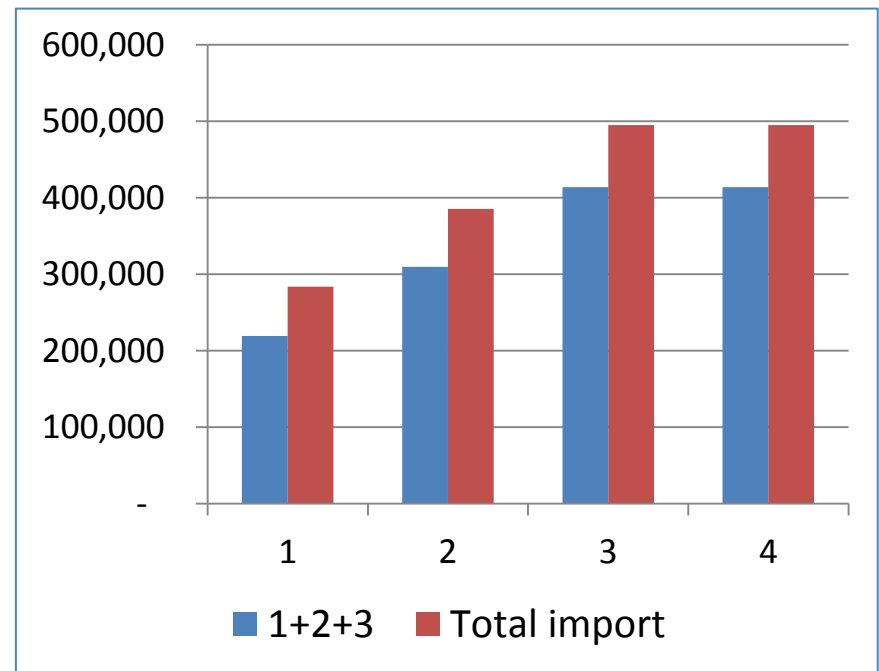
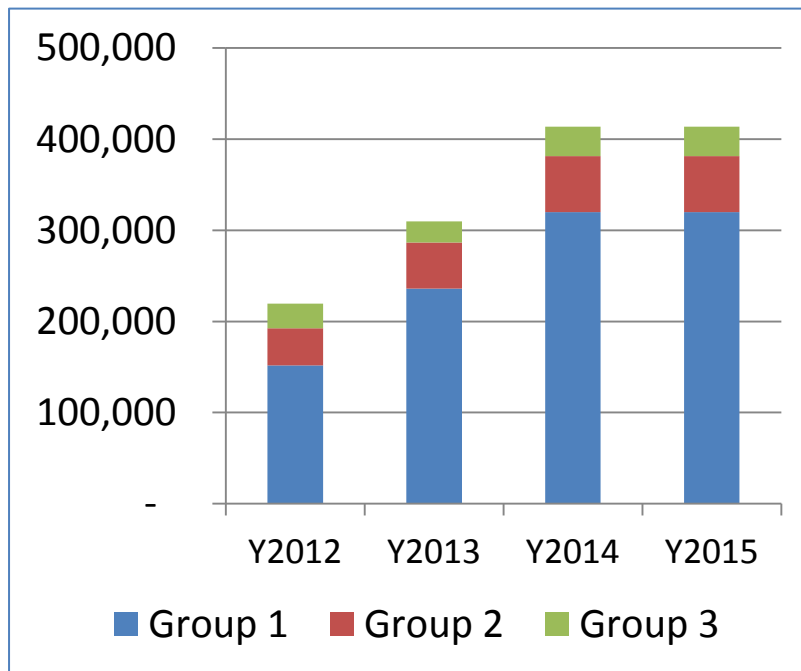
Sawn wood: Volume and Value



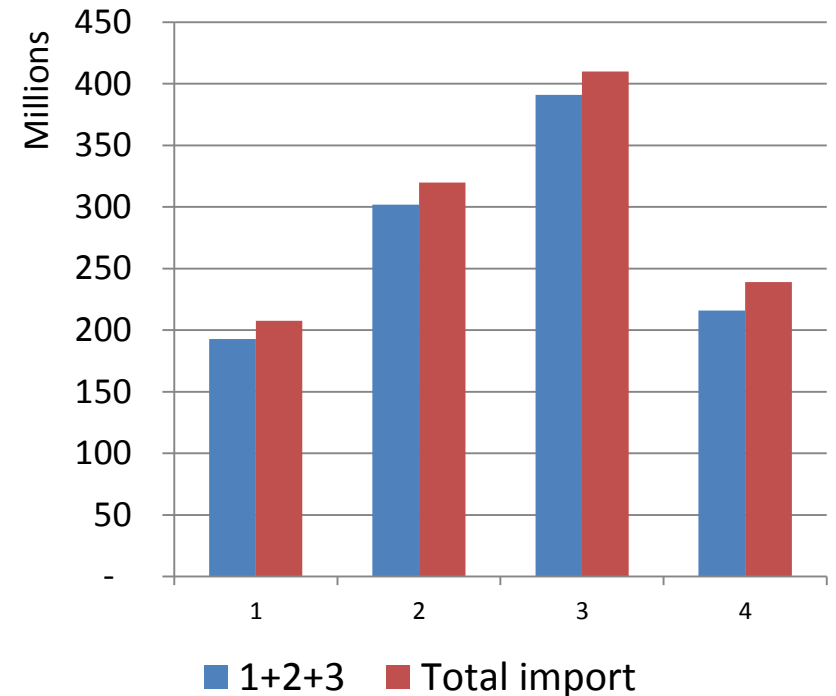
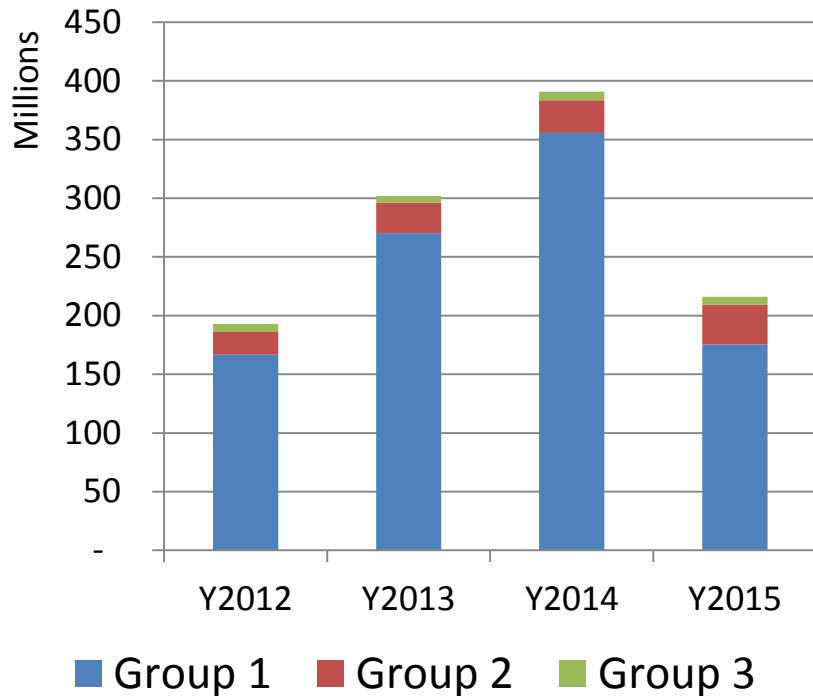
Year	Volume (mil m3)	Volume (m3 RWE)	Value (mil USD)
2012	0.28	0.40	207.6
2013	0.39	0.54	319.9
2014	0.50	0.69	410.0
2015	0.38	0.54	239.2



Sawn wood: Volume (m3) by Group



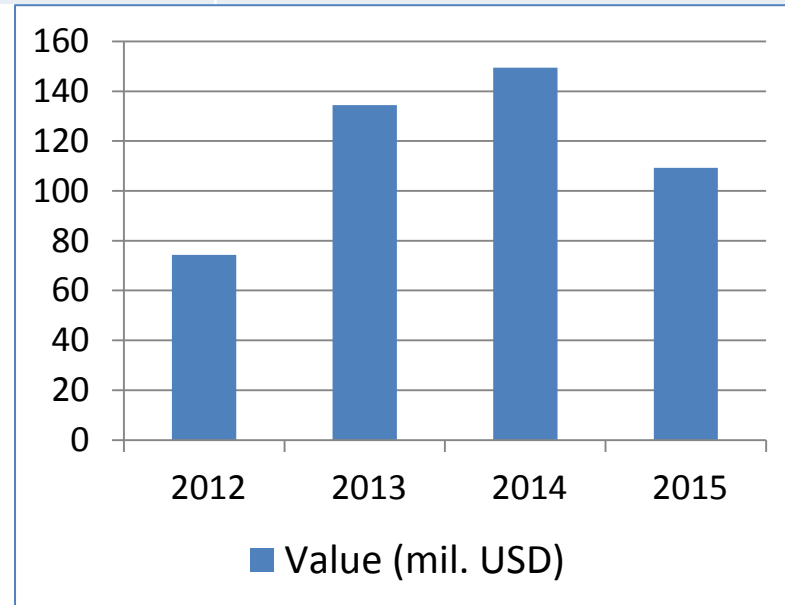
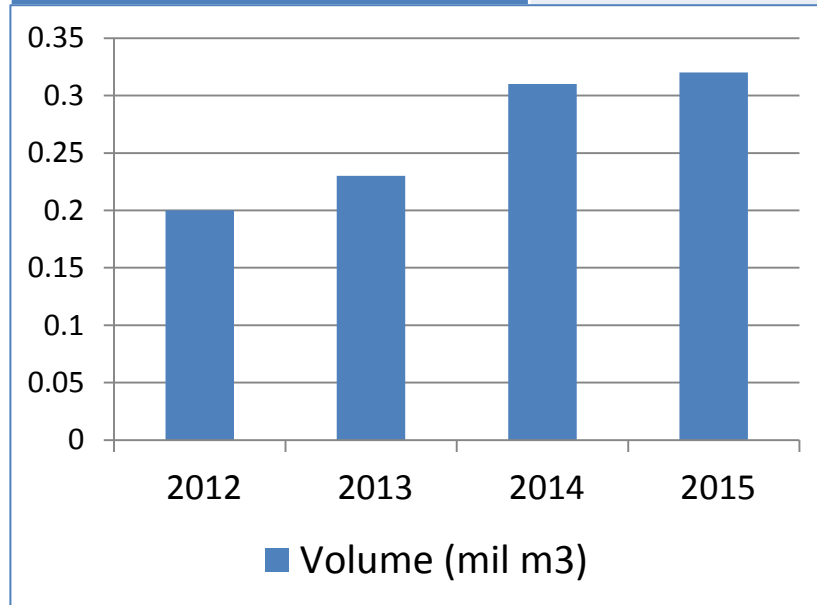
Sawn wood: Value (USD) by Group



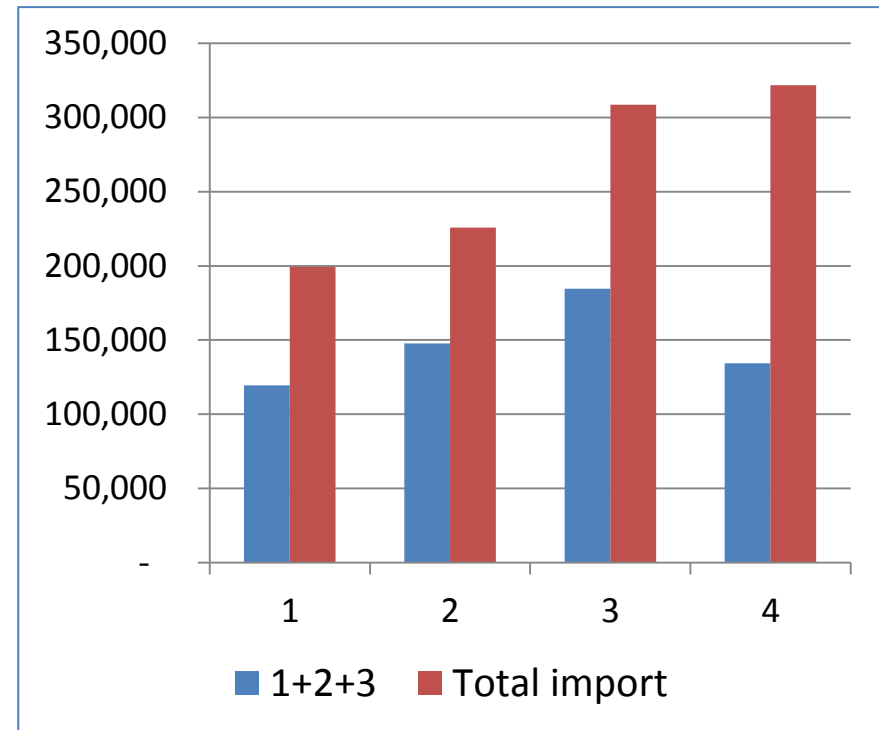
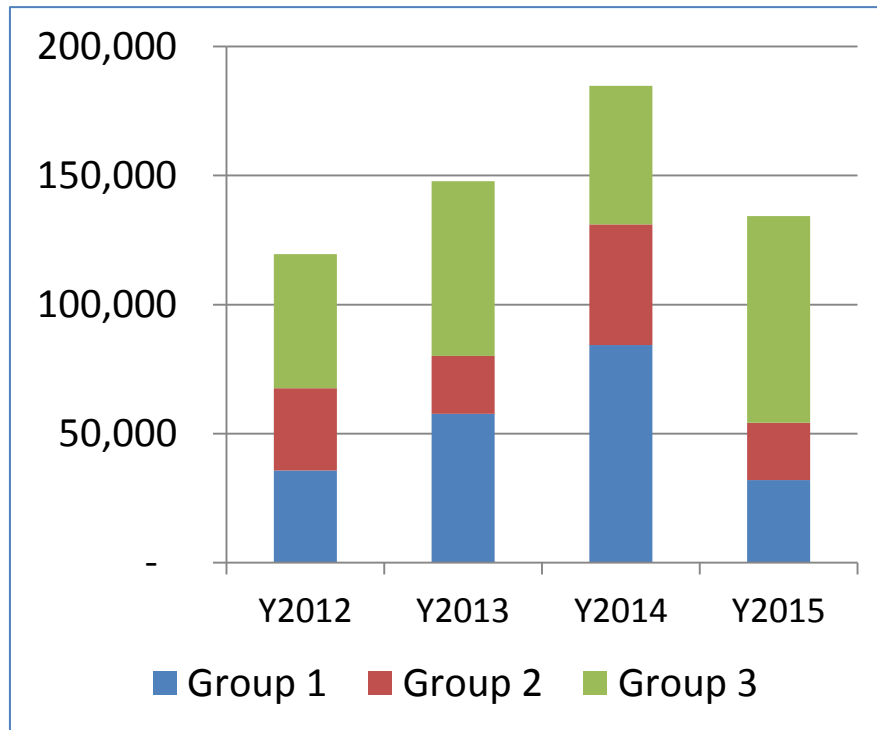
Round log: Value and Volume



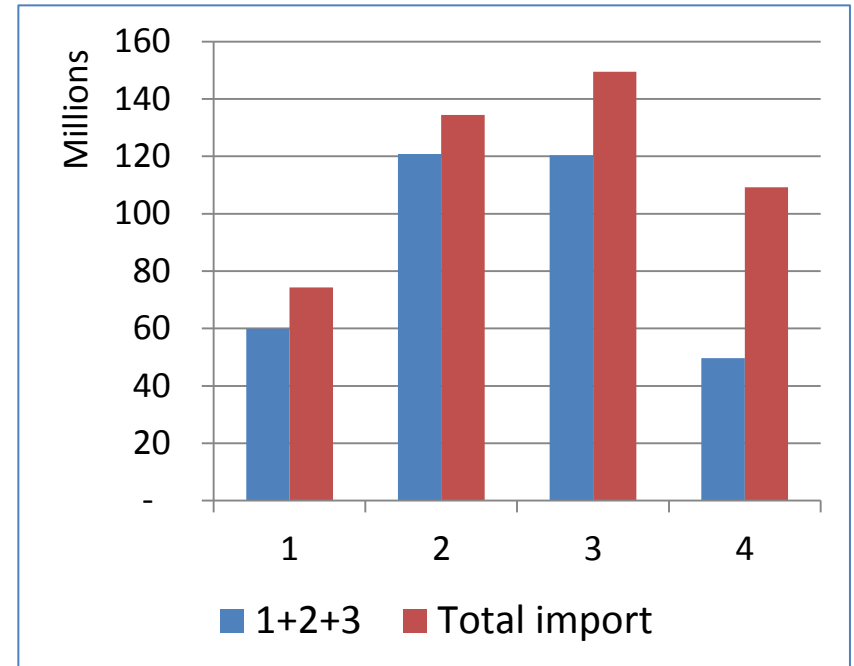
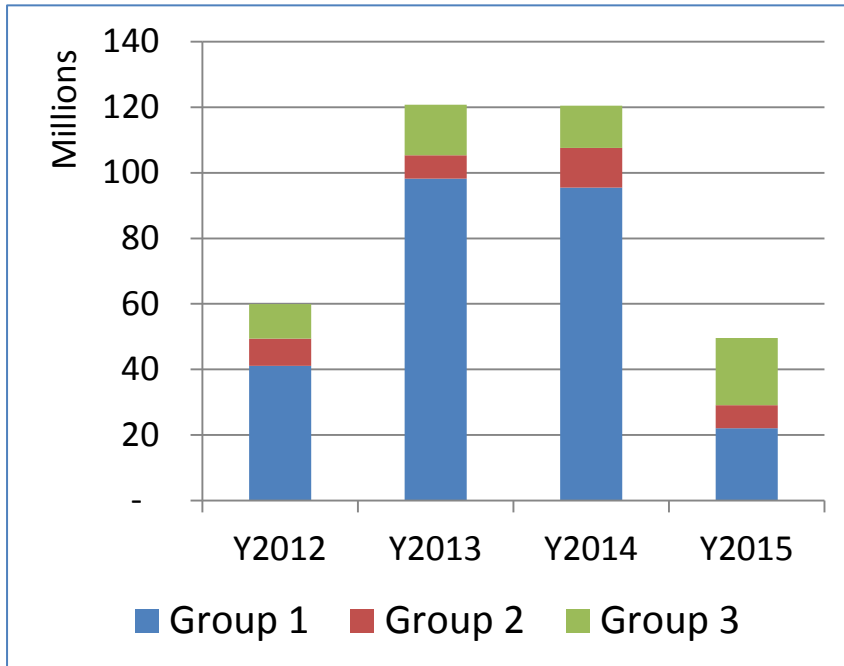
Year	Volume (mil m3)	Value (mil USD)
2012	0.20	74.3
2013	0.23	134.4
2014	0.31	149.5
2015	0.32	109.3



Round log: Volume (m3) by Group



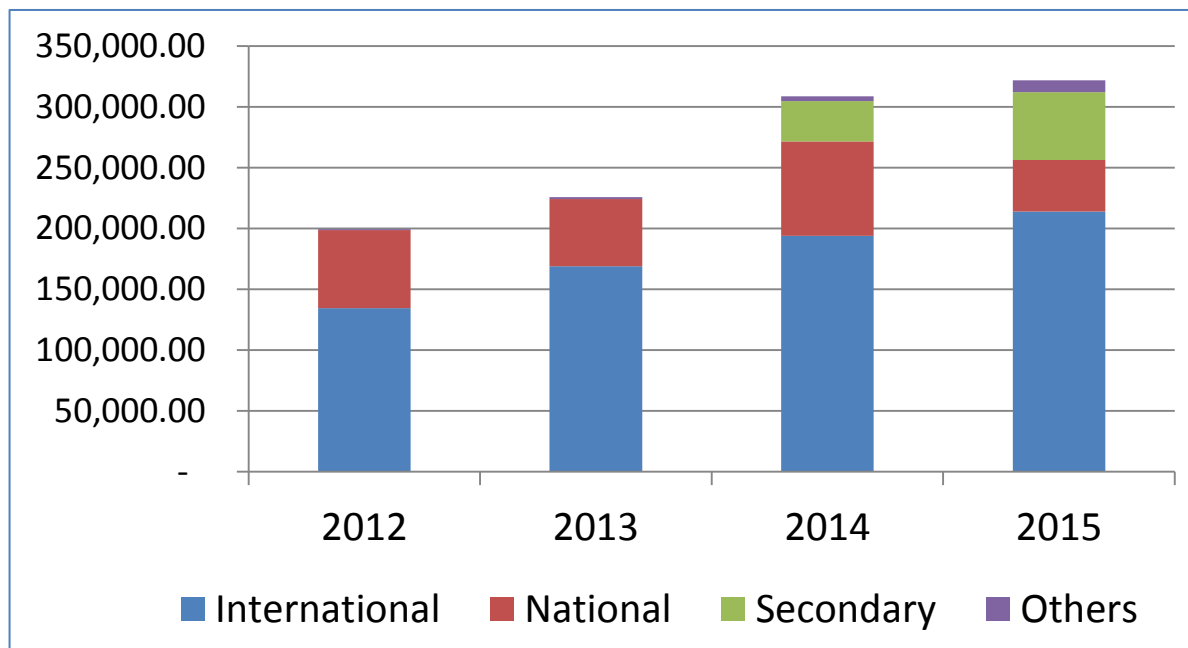
Round log: Value (USD) by Group



Checkpoints: Volume of log (m3)



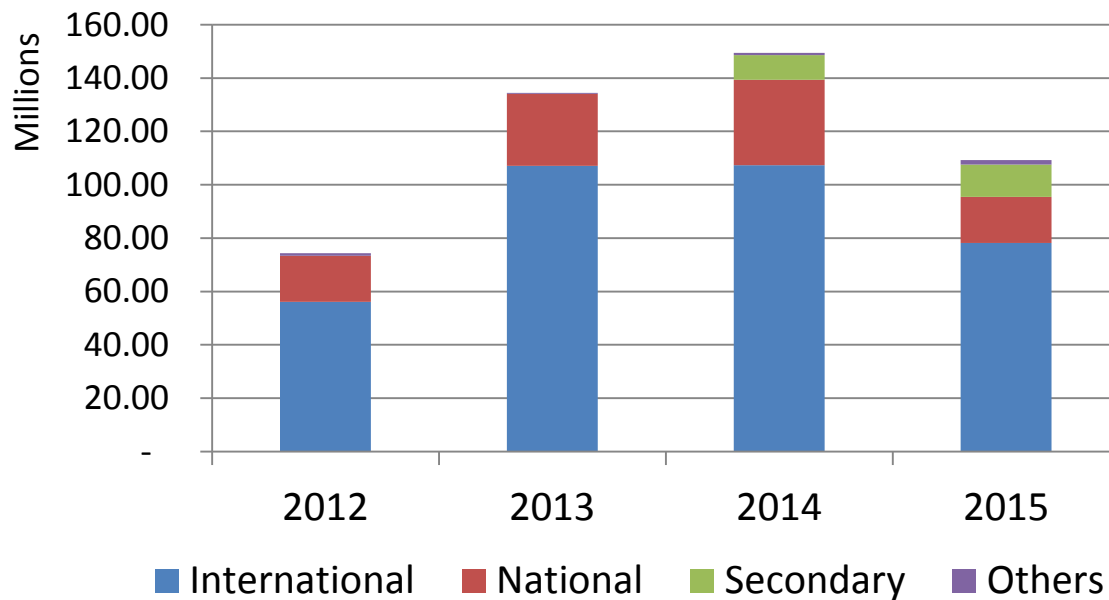
Check points	2012	2013	2014	2015
International (9)	134,449	168,836	193,812	214,010
National (32)	64,168	55,425	77,631	42,271
Secondary (2)	0	0	33,378	55,733
Others	732	1,550	3,826	9,704



Checkpoint: Value of log (mil USD)



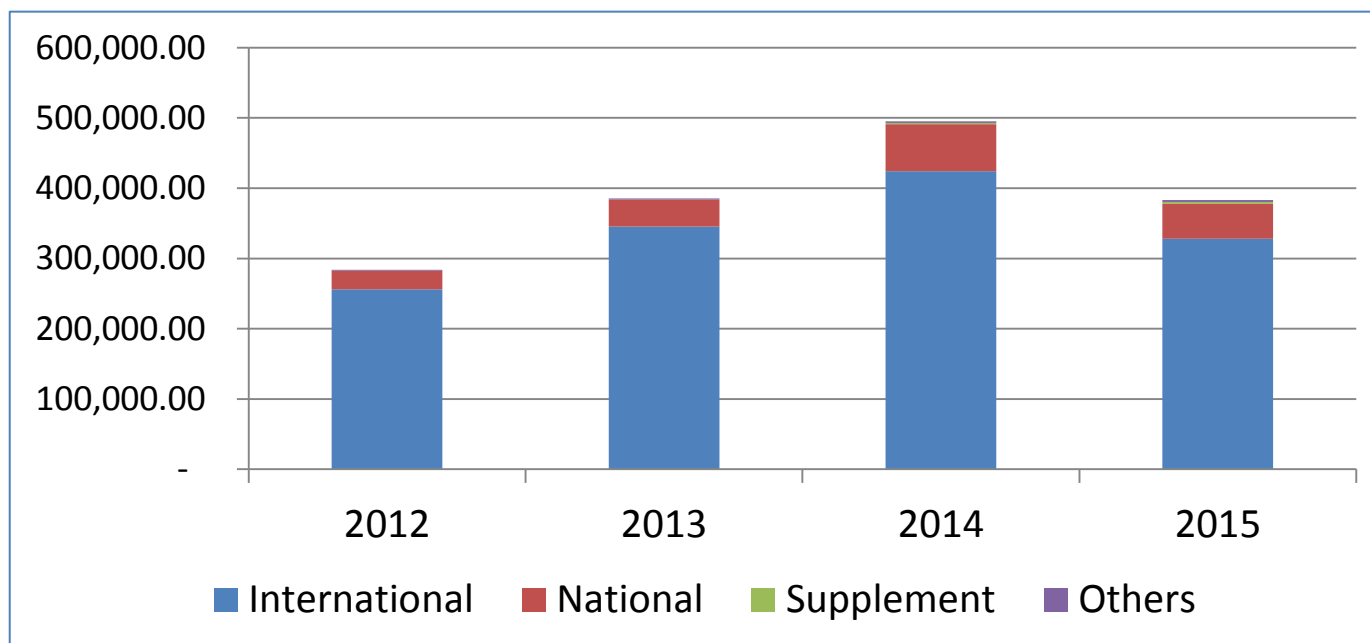
	2012	2013	2014	2015
International	56.1	107.1	107.3	78.2
National	17.4	27.0	32.1	17.2
Secondary	0	0	9.2	12.2
Others	0.9	0.3	0.8	1.7



Checkpoint: Volume of sawn wood (m3)



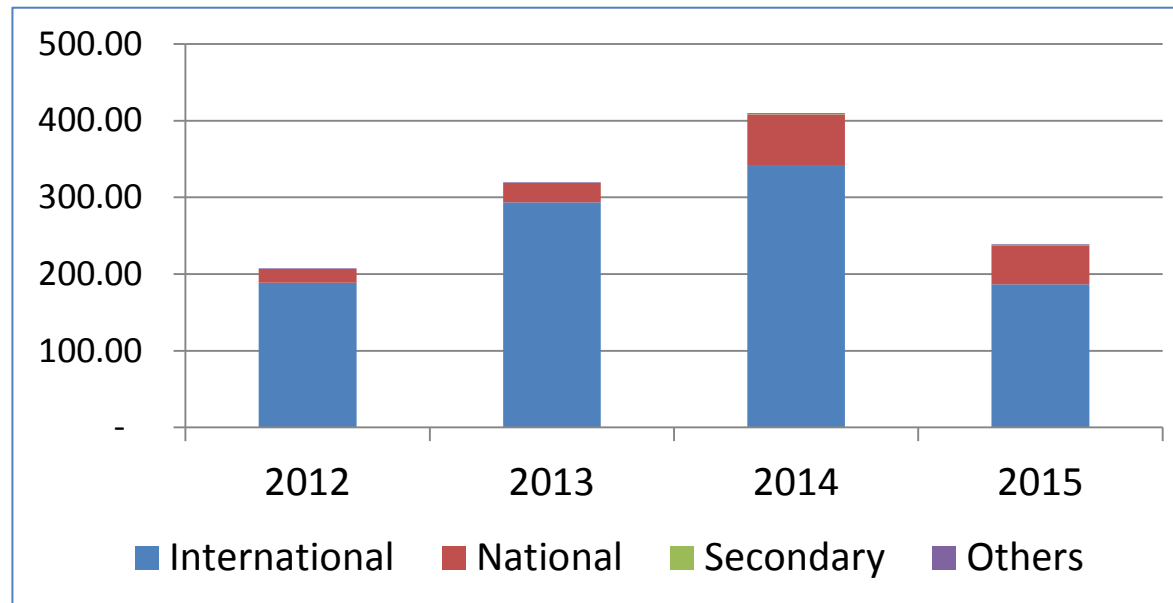
	2012	2013	2014	2015
International	256,238	345,518	424,252	327,939
National	26,178	38,751	66,837	49,795
Secondary	0	0	1,952	2,720
Others	1,444	1,216	2,085	2,695



Checkpoint: Value of sawn wood (mil USD)

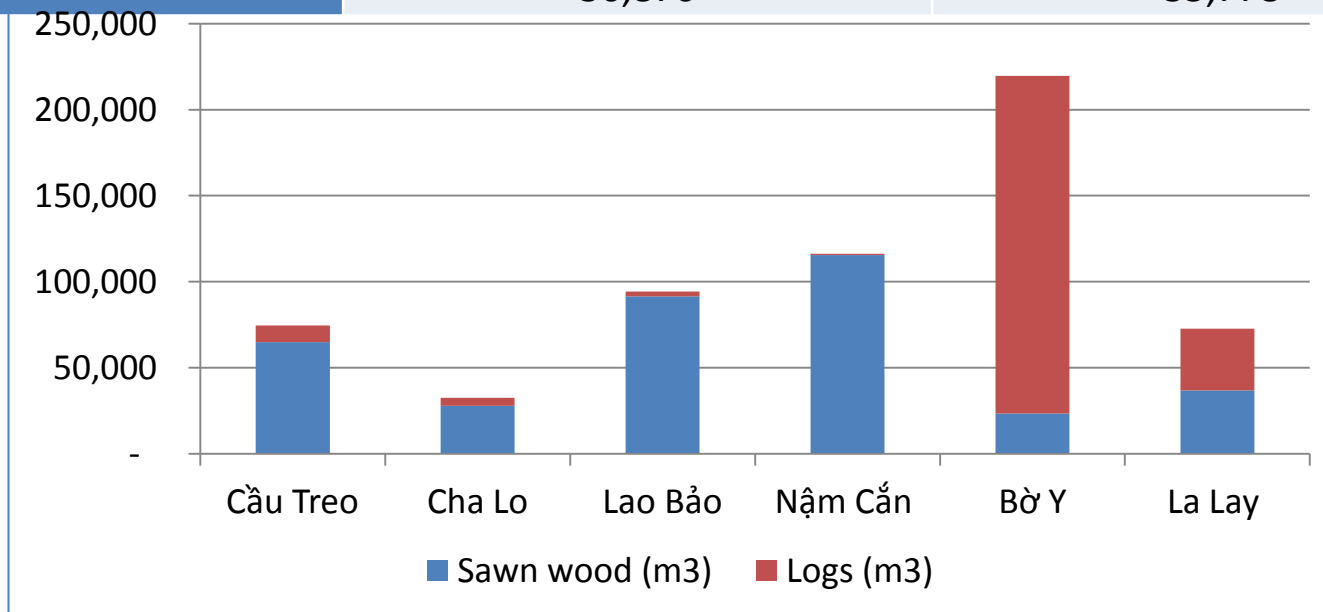


	2012	2013	2014	2015
International	188.8	293.6	340.8	186.7
National	17.9	25.5	67.2	51.0
Secondary	0	0	0.5	0.7
Others	0.9	0.75	1.45	0.7



Key checkpoints in 2015: Volume

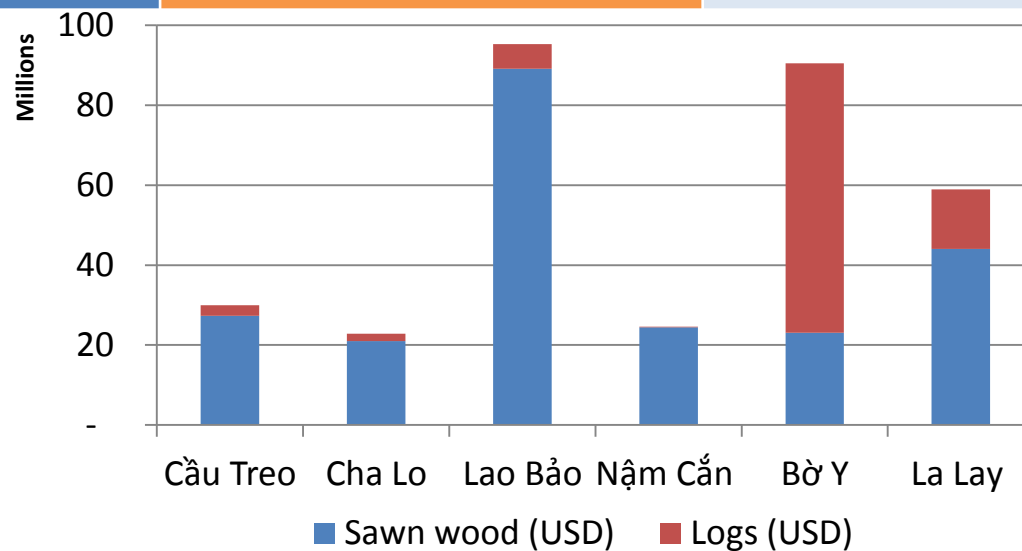
Checkpoint	Sawn wood (m3)	Logs (m3)
Cầu Treo	64,972	9,537
Cha Lo	27,798	4,693
Lao Bảo	91,448	2,809
Nậm Cắn	115,460	748
Bờ Y	23,497	196,130
La Lay	36,870	35,778



Key checkpoints in 2015: Value



Checkpoint	Sawn wood (mil USD)	Logs (Mil USD)
Cầu Treo	27.3	2.7
Cha Lo	21.0	1.8
Lao Bảo	89.1	6.2
Nậm Cắn	24.5	0.2
Bờ Y	23.1	67.4
La Lay	44.1	14.9



Some key highlights: Vietnam – Laos timber trade



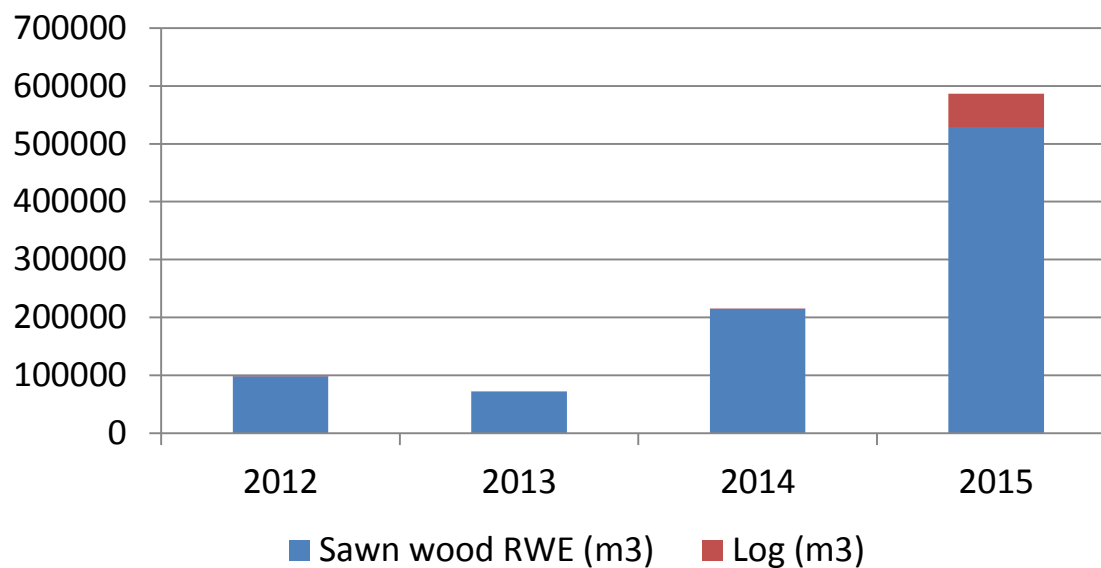
- Volume of import from Laos reduced in 2015 but still high: Challenges to bring the trade down
- Proportion of high value timber species is high (60-70% for logs, and > 80% for sawn wood)
- Most of wood imported through international checkpoints; some emerging national check points
- A large number of check points: Challenges to control the trade
- There are 5-6 key checkpoints with different dynamics (e.g. types of wood, timber species). What does this tell us?
 - Geopolitics ? Different level of stringent control across checkpoints ?
- Efforts to bring down the trade volume should focus on major checkpoints
- Lao Bao and Cau Treo are top checkpoints in in value (high value timber species/sawn wood), whereas Bo Y is top in volume (lower value species/round log)
- Is there any Lao timber imported to Vietnam through Cambodia ?
- Is the decrease in timber import to Vietnam from Laos (2015) real ?

***Vietnam – Cambodia Timber Trade 2012 – 2015:
A Brief (a report now under construction)***

Vietnam import from Cambodia: Volume

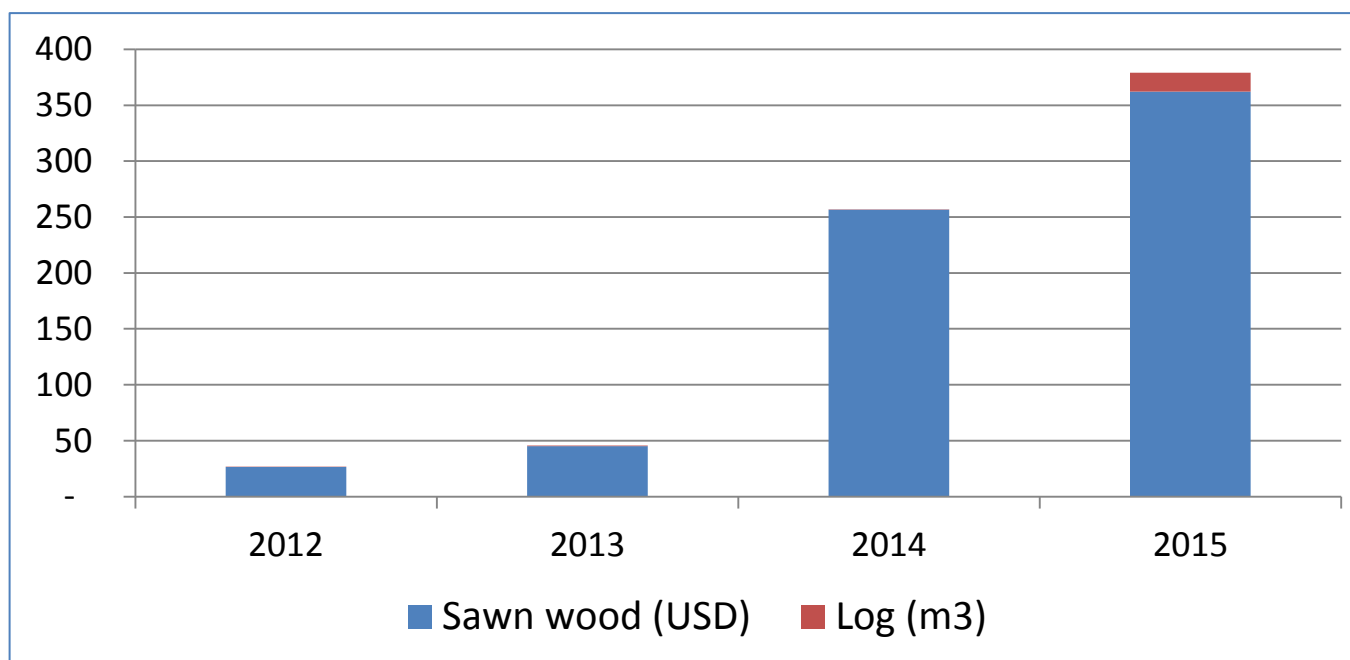


	Sawn wood (m3 RWE)	Log (m3)	Total (m3 RWE)
2012	98,534	296	98,829
2013	71,576	405	71,981
2014	214,965	383	215,348
2015	529,130	57,718	586,848



Vietnam import from Cambodia: Value

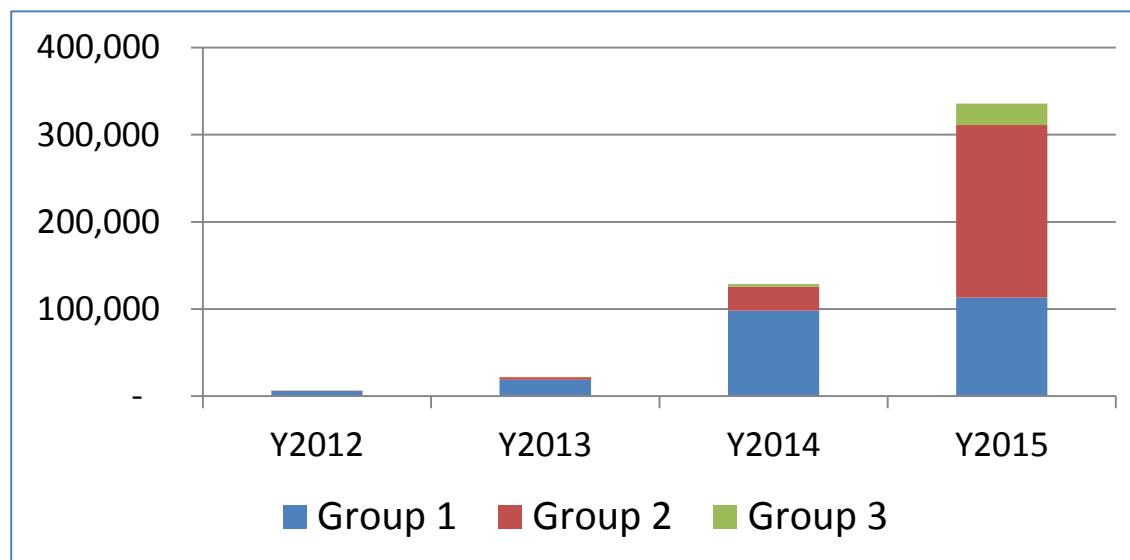
	Sawn wood (mil USD)	Log (mil USD)	Total (mil USD)
2012	26.5	0.18	28.6
2013	45.0	0.0007	47.5
2014	256.5	0.02	257.0
2015	362.1	16.9	380.4



Vietnam import of sawn wood by Group: Volume



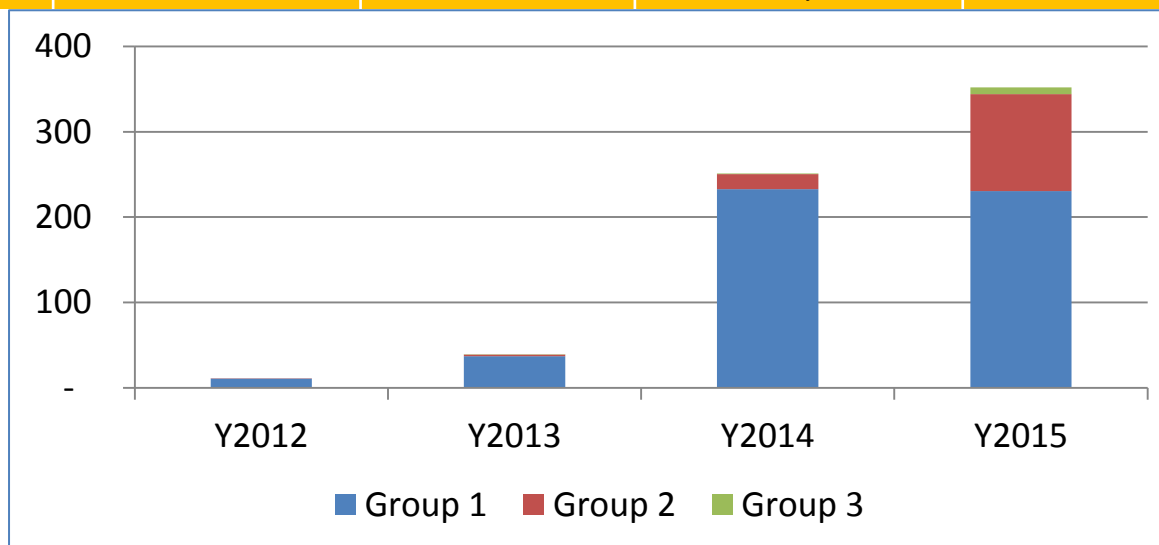
Group	2012	2013	2014	2015
1	6,063	18,915	98,013	113,072
2	251	2,847	27,783	197,917
3	-	93	2,892	24,600
1+2+3	6,314	21,855	128,689	335,589
Total	70,381	51,126	153,547	377,950
%1-3/total	9.0	42.7	83.8	88.8



Vietnam import of sawn wood from Cambodia by Group: Value (mil USD)



Group	2012	2013	2014	2015
1	10.9	37.1	232.9	230.6
2	0.15	1.7	17.4	113.6
3	-	0.06	0.9	7.7
1+2+3	11.1	38.9	251.2	351.9
Total	26.5	45.0	256.5	362.1
%1-3/Total	41.8	86.5	98,0	97.2



Some key highlights: Vietnam – Cambodia timber trade



- Import has been a surge in 2015
- Most of import is high value timber
- Concerns from Cambodian authorities on CITES permits including those from granted by Lao authorities
- Recent Cambodia government's crackdown of timber trade to Vietnam reflects the problem of illegality associated with trade
- Timber trade relationship among Lao – Cambodia – Vietnam is still not clear
- Three timber associations and Forest Trends is working on Vietnam – Cambodia timber trade report

A scenic landscape of rolling green hills and dense forests under a cloudy sky. The foreground is filled with lush green trees, while the background shows layers of misty, blue-toned hills. A semi-transparent dark band across the middle of the image contains the text.

Thank you

To Xuan Phuc
pto@forest-trends.org
www.forest-trends.org