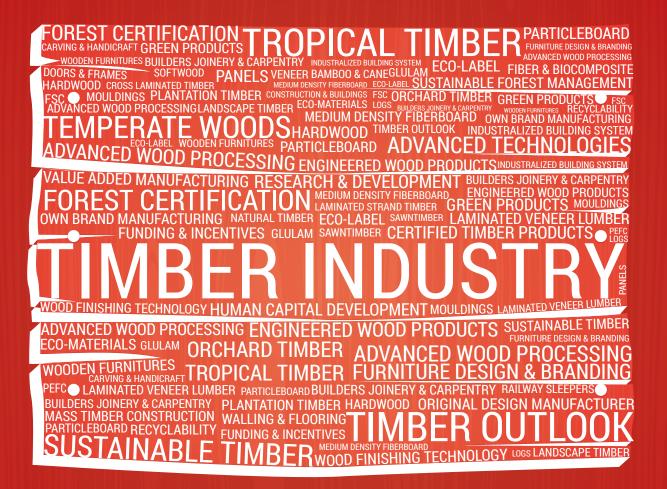


GLOBAL TIMBER CONFERENCE 2017



www.globaltimberconference.com

6 - 8 November 2017 Pullman Kuching, Sarawak, Malaysia

Innovation & Market Driven Strategies: Keys to Sustainable Growth

Researched, Organised & Managed by:



Supported by:



Sarawak Timber Industry **Development Corporation**

OVERVIEW

Timber; flexible, structurally strong and being the lowest embodied carbon of any commercially available commodity; contributes \$600 billion to the global economy and that translates to 1% of global total GDP. According to the World Bank's forecast, the global demand for timber will quadruple by 2050. The market foresees major changes in the regional supply of and demand for wood fiber over the next two decades which will impact both international markets and other producers around the globe.

Southeast Asia itself has extensive tropical hardwood resources and wood processing industries, and is a major supplier of hardwood logs and woodchips. It is also a primary supplier of pulp, plywood and furniture to the global markets. Given Southeast Asia's key role in the global hardwood markets, trends occurring in this region disproportionately impact global trade flows.

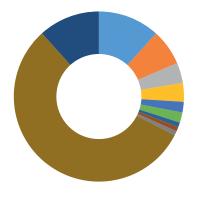
The second edition of the Global Timber Conference 2017 (GTC 2017) is once again back to gather 300 odd regional policy makers, experts and captains of the industry from over 20 countries in Sarawak; under the selected theme 'Innovation & Market Driven Strategies: Keys to Sustainable Growth' to discuss and deliberate on strategies in lifting the timber and timber-products industry.





MARKET UPDATES

Asia: Export of Timber & Timber Products, 2015



- Plywood, USD8,852 mil, 12%
- Builders' Joinery & Carpentry, USD5,183 mil, 7%
- Sawntimber, USD2,925 mil, 4%
- Fibreboard, USD2,675 mil, 3%
- Logs, USD1,520 mil, 2%
- Mouldings, USD1,473 mil, 2%

- Veneer, USD687 mil, 1%
- Particle board, USD629 mil, 1%
- Wooden frames, USD609 mil, 1%
- Furniture, USD42,162 mil, 56%
- Others*, USD8,811 mil, 11%

TOTAL: USD 75.53 billion

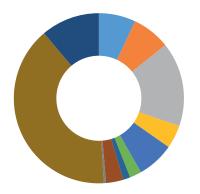
Value: USD'000

Product	2015
Plywood	8,851,894
Builders' Joinery & Carpentry	5,183,280
Sawntimber	2,924,800
Fibreboard	2,674,777
Logs	1,519,883
Mouldings	1,472,812

Product	2015
Veneer	686,614
Particle board	629,282
Wooden frames	608,823
Furniture	42,161,786
Others*	8,811,208
Total	75,525,159

Others* consist of 12 products Source: UN- Comtrade

World: Export of Timber & Timber Products, 2015



- Plywood, USD14,529 mil, 7%
- Builders' Joinery & Carpentry, USD15,061 mil, 7%
- Sawntimber, USD33,313 mil, 16%
- Fibreboard, USD9,166 mil, 5%
- Logs, USD14,642 mil, 7%
- Mouldings, USD4,648 mil, 2%

Veneer, USD2,784 mil, 1%

- Particle board, USD6,829 mil, 3%
- Wooden frames, USD913 mil, 1%
- Furniture, USD 82,551 mil, 40%
- Others*, USD23,138 mil, 11%

Value: USD'000

Product	2015	
Plywood	14,528,802	
Builders' Joinery & Carpentry	15,060,629	
Sawntimber	33,313,039	
Fibreboard	9,165,888	
Logs	14,641,977	
Mouldings	4,648,386	

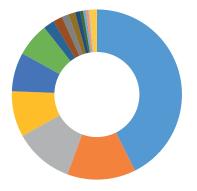
TOTAL: USD207.57 billion

Product	2015
Veneer	2,783,622
Particle board	6,829,416
Wooden frames	913,244
Furniture	82,550,721
Others*	23,138,073
Total	207,573,797

Others* consist of 12 products Source: UN- Comtrade

MARKET UPDATES

Asia: Export of Timber by Major Destination, 2015



- China, USD14,211 mil, 43%
- Indonesia, USD4,349 mil, 13%
- Malaysia, USD3,764 mil, 11%
- Philippines, USD2,907 mil, 9%
- Viet Nam, USD2,461 mil, 7%
- Thailand, USD2,136 mil, 6%
- Turkey, USD693 mil, 2%
- Lao PDR, USD596 mil, 2%

- Myanmar, USD442 mil, 1%
- India, USD426 mil, 1%
- Hong Kong, USD317 mil, 1%
- Japan, USD189 mil, 1%
- UAE, USD177 mil, 1%
- Taipei, USD169 mil, 1%
- Singapore, USD95 mil, 0.3%
- Others*, USD430 mil, 1%

TOTAL: USD33.36 Billion

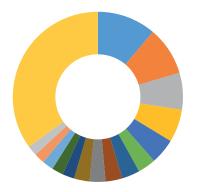
Value: USD'000

Rank	Exporter Country	2015
	ASIA	33,363,437
1	China	14,211,189
2	Indonesia	4,349,143
3	Malaysia	3,764,314
4	Philippines	2,907,309
5	Viet Nam	2,461,323
6	Thailand	2,135,530
7	Turkey	693,126
8	Lao People's Democratic Republic	595,581

Rank	Exporter Country	2015
9	Myanmar	442,321
10	India	425,890
11	Hong Kong	317,396
12	Japan	189,483
13	United Arab Emirates	176,998
14	Taipei, Chinese	168,561
15	Singapore	95,305
	Others*	429,968

Others* consist of 35 countries Source: UN- Comtrade

World: Export of Timber by Major Destination, 2015



- China, USD14,211 mil, 11%
- Canada, USD11,762 mil, 9%
- US, USD8,913 mil, 7%
- Germany, USD7,939 mil, 6%
- Russian Federation, USD6,152 mil, 5%
- Indonesia, USD4,349 mil, 3%
- Austria, USD4,336 mil, 3%
- Poland, USD4,044 mil, 3%

- Sweden, USD3,828 mil, 3%
- Malaysia, USD3,764 mil, 3%
- Philippines, USD2,907 mil, 2%
- Finland, USD2,745 mil, 2%
- France, USD2,710 mil, 2%
- Belgium, USD2,522 mil, 2%
- Viet Nam, USD2,461 mil, 2%
- Others*, USD44,451 mil, 35%

TOTAL: USD127.10 billion

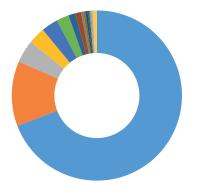
2015		Rank	Exporter Country	2015
5,750		9	Sweden	3,828,051
1,189		10	Malaysia	3,764,314
2,464		11	Philippines	2,907,309
2,664		12	Finland	2,745,099
9,080		13	France	2,710,352
1,899		14	Belgium	2,521,754
9,143		15	Viet Nam	2,461,323
6,194			Others*	44,450,957
2 05 0	1			

Others* consist of 201 countries Source: UN- Comtrade

Rank	Exporter Country	2015
	World	127,095,750
1	China	14,211,189
2	Canada	11,762,464
3	US	8,912,664
4	Germany	7,939,080
5	Russian Federation	6,151,899
6	Indonesia	4,349,143
7	Austria	4,336,194
8	Poland	4,043,958

MARKET UPDATES

Asia: Export of Furniture by Major Destination, 2015



- China, USD29,172 mil, 69.2%
- Viet Nam, USD5,200 mil, 12.3%
- Malaysia, USD1,824 mil, 4.3%
- Turkey, USD1,352 mil, 3.2%
- Indonesia, USD1,327 mil, 3.1%
- Taipei, USD1,002 mil, 2.4%
- India, USD557 mil, 1.3%
- Thailand, USD459 mil, 1.1%

- Hong Kong, USD182 mil, 0.4%
- Philippines, USD177 mil, 0.4%
- South Korea, USD172 mil, 0.4%
- UAE, USD150 mil, 0.4%
- Singapore, USD144 mil, 0.3%
- Israel, USD109 mil, 0.3%
- Japan, USD64 mil, 0.2%
- Others*, USD271 mil, 0.6%

TOTAL: USD42.16 billion

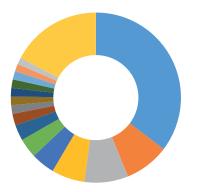
Value: USD'000

Rank	Exporter Country	2015
	ASIA	42,161,786
1	China	29,171,533
2	Viet Nam	5,199,866
3	Malaysia	1,823,915
4	Turkey	1,351,612
5	Indonesia	1,327,444
6	Taipei, Chinese	1,002,702
7	India	557,310
8	Thailand	458,650

Rank	Exporter Country		2015
9	Hong Kong		182,471
10	Philippines		176,962
11	Korea, Republic of		171,802
12	UAE		149,524
13	Singapore		143,699
14	Israel		109,428
15	Japan		63,946
	Others*		270,922
	Others* consist of 24 countries	C	

Others* consist of 34 countries Source: UN- Comtrade

World: Export of Furniture by Major Destination, 2015



Value: USD'000

- China, USD29,172 mil, 35%
- Italy, USD7,013 mil, 8%
- Germany, USD6,893 mil, 8%
- Viet Nam, USD5,200 mil, 6%
- Poland, USD3,738 mil, 5%
- US, USD3,058 mil, 4%
- Canada, USD2,479 mil, 3%
- Malaysia, USD1,824 mil, 2%

- Turkey, USD1,352 mil, 2%
- Sweden, USD1,350 mil, 2%
- Denmark, USD1,343 mil, 2%
- Spain, USD1,332 mil, 2%
- Indonesia, USD1,327 mil, 2%
- France, USD1,166 mil, 1%
- Lithuania, USD1,051 mil, 1%
- Others*, USD14,253 mil, 17%

TOTAL: USD82.55 Billion

Rank	Exporter Country	2015
	World	82,550,721
1	China	29,171,533
2	Italy	7,012,611
3	Germany	6,893,022
4	Viet Nam	5,199,866
5	Poland	3,738,236
6	US	3,058,458
7	Canada	2,478,777
8	Malaysia	1,823,915

Rank	Exporter Country	2015
9	Turkey	1,351,612
10	Sweden	1,349,770
11	Denmark	1,343,383
12	Spain	1,331,541
13	Indonesia	1,327,444
14	France	1,166,079
15	Lithuania	1,051,351
	Others*	14,253,123

Others* consist of 203 countries Source: UN- Comtrade

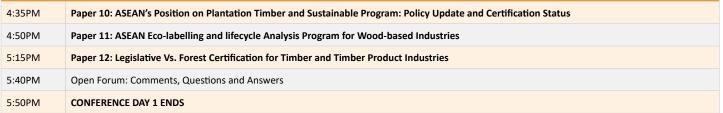
PROGRAM

7:30AM GTC 2017 Study Tour Registration Begins 8:30AM-1 Study Tour 3:00PM Drop off at Hotel Lobby 4:00PM Drop off at Hotel Lobby DAY TWO: 7 NOVEMBER 2017, TUESDAY 7:30AM GTC 2017 Registration Begins 8:30AM Arrival of Distinguished Guests 8:30AM Arrival of Distinguished Guests 8:30AM Arrival of Guest of Honor OPENING CEREMONY 9:00AM INTRODUCTORY REMARKS Datuk Dr. Addul Aziz S.A. Kadir, Chairman, Confeshub Group 9:00AM WELCOME ADDRESS 9:00AM VELEDA ADDRESS 9:00AM VELEDA ADDRESS 9:00AM VELEDA ADDRESS 9:00AM Refreshments Break 9:00AM Plenary Address 1: What are the Impacts and Benefits of TPP and RCEP on Timber Industry in Asia? 9:00AM Plenary Address 1: What are the Impacts and Benefits of TPP and RCEP on Timber Industry in Asia? 10:00AM Plenary Address 1: What are the Impacts and Benefits of TPP and RCEP on Timber Industry in Asia? 10:00AM Plenary Address 1: GLAN_TIMBER OUTOOX: DEMAND, SUPPY AND PROSPECTS Premer Address 1: What are the Impacts and Benefits of TPP and RCEP on Timber Industry in Asia?
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*YAB Datuk Amar Abang Haji Abdul Rahman Zohari bin Tun Datuk Abang Haji Openg, Chief Minister of Sarawak 9:30AM Networking & Refreshments Break Di 200AM Plenary Address 1: What are the Impacts and Benefits of TPP and RCEP on Timber Industry in Asia? 10:30AM Plenary Address 2: Assessing the Impact of COP 21 on Natural Forest and Forest Plantation in Asia. SESSION 1: GLOBAL TIMBER OUTLOOK: DEMAND, SUPPLY AND PROSPECTS The new Trump administration called for "America First" and for "Buy American, Hire American". The Trump administrative also has withdrawn from the Pacific Partnership, an agreement among twelve countries across three continents and looking to impose a tax on all imports to the United States. Meanwhil United Kingdom has recently voted for Brexit referendum to leave the EU, which will posed restrictions of the movement of goods. Ironically, China-backed Re Comprehensive Economic Partnership (RCEP); 10 Association of Southeast Asian Nations (ASEAN) and six countries with which the bloc has existing free trade Comprehensive Scondict for the global economy and the major trade currencies, and its impact on the demand and supply of timber and how the chained of these events will impact the global economy and the major trade currencies, and its impact on the demand and supply of timber and how the chained of these events will impact the global economy and the major trade currencies, and its impact on the demand and supply of timber and how the chained of these events will impact the global economy and the major trade currencies, and its impact on the demand and supply of timber and how the chained of these events will impact the global economy and the major trade support the demand and supply of timber and how the chained of these events will impact the global econ
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12:15PM Paper 4: Asia's Furniture Industry Outlook: Status and Market Prospects
12:40PM Open Forum: Comments, Questions and Answers
12:50PM Luncheon for Guest Speakers and Delegates
SESSION 2: GENOMICS AND GOOD SILVICULTURAL PRACTICES: THE KEYSTONE TO PRODUCTIVITY AND PROFITABILITY Selecting the suitable species for the establishment of timber plantation requires careful consideration on the production goal, desired silvicultural and g characteristics. While indigenous species should be the preferred species, difficult terrain such as steep slopes, and climatic conditions such as strong rainfal
winds, high temperatures and frequent droughts can impede the use of these species. Where these conditions exist, pioneer or introduced species may be successful than indigenous species. The main aim of the session is to look at various planting stocks that are suitable, biotechnology application to produc species, and the adoption of Good Silvicultural Practices that will enhance plantation productivity and profitability.
1:50PM Paper 5: China's Approaches to Species Selection and Stand Diameter Improvement through Science, Technology and Innovation Breakthrou
2:15PM Paper 6: Vietnam's Strategy in Selecting Hardwood Species to Meet Global Demand for Timber
2:40PM Paper 7: Indonesia's Extension Services for Timber Plantation and Species Selection to Meet Demand for Timber
3:05PM Paper 8: Optimizing Stand Yield Through Adoption of Good Silvicultural Practices
3:30PM Paper 9: The Genetically Modified Timber Species for Commercial Exploitation
3:55PM Open Forum: Comments, Questions and Answers
4:05PM Networking & Refreshment Break

PROGRAM

SESSION 3: STANDARDS, CERTIFICATIONS AND ECO-LABELING OF TIMBER AND TIMBER PRODUCT INDUSTRIES: IMPACTS AND BENEFITS TO THE

As the world grapples with a growing number of challenges including climate change, natural resource-depletion, biodiversity loss, poverty, and population growth; many solutions have been offered as part of the efforts to achieve a greener world. Yet it is becoming increasingly clear that we need to work harder to foster the transition to more sustainable patterns of production and consumption. The main aim of the session is to review the current and recommend new policies and strategies pertaining to the source of raw materials from natural and planted forests, the amount of energy to process timber into finished building components, the lifecycle analysis of timber throughout its use-phase, timber product recyclability, reusability and biodegradability; and the social sustainability of the supply chain.



DAY THREE: 8 NOVEMBER 2017. WEDNESDAY

	DAT THREE: 8 NOVEWIDER 2017, WEDNESDAT
The timber in forests and e wood-based wood-based	SESSION 4: ALTERNATIVE RAW MATERIALS TO TIMBER FOR WOOD-BASED INDUSTRIES: DEVELOPMENT AND PROSPECTS idustry would face shortage in supply of quality timber in the near future due to the increasing importance and priority given to the conservation of nvironment. There are many lesser known species and agricultural by products that can be used as alternatives to supplement current requirements by ndustries. Through the various research and development (R&D) initiatives by regional universities and research institutions have successfully identified products that can be produced from these alternative resources which could help to reduce the industry's dependence on forest and plantation timbers. of the session is to explore and discuss the technical and market viability of these alternative raw materials for the wood-based industries.
9:00AM	Paper 13: Bamboo as an Advanced Alternative Raw Material for Wood and Wood-Based Composites: Trends and Prospects
9:25AM	Paper 14: Natural Fiber and Biocomposite Materials for Technical Applications in Value-Added Products
9:50AM	Paper 15: Advanced Technologies to Transform Wastes to Wood-Based Materials
10:15AM	Open Forum: Comments, Questions and Answers
10:25AM	Networking & Refreshment Break
properties an They must ha with possibili	SESSION 5: URBAN TRANSFORMATION IN TIMBER echnology and solutions for fire protection opens for a broader application of wood-based solutions in urban areas. Stronger focus on the environmental d the carbon-sequestrating potential of building materials places wood at the centre of attention. Sustainable buildings must be designed for long lifecycles. ve a high and durable architectural and technical quality and they must be adaptable to varied use over time. They must combine generality in room forms ties for flexible partitioning and furnishing. This requires tight coordination of constructions, building envelopes and the systems for water supply, sewage, entilation. The main aim of the session is to develop strategies for transformations in dense, urban locations using timber as a main material.
10:55AM	Paper 16: Productivity and Performance Improvements of Adhesive Lamination for Tall Timber Buildings Construction
11:20AM	Paper 17: Combining Concept, Building Design and Engineered Timber Materials for Development of Timber Skyscrapers
11:45AM	Paper 18: Usage of Nanotechnology to Develop Fire Resistance, Moisture Tolerance and Seismic Resilience High Rise Timber Buildings
12:10PM	Paper 19: Wood and Technology for Exterior Applications
12:35PM	Open Forum: Comments, Questions and Answers
12:45PM	Luncheon for Guest Speakers and Delegates
role in promo and contribut range of seco	SESSION 6: THE NEXT WAVE IN WOODEN FURNITURE INDUSTRY: DESIGN, MATERIAL AND TECHNOLOGY iture industries make a substantial contribution to the development in tropical countries, producing important economic benefits and playing a significant ting economic growth. As wood-processing industries such as the wooden furniture sector develop, they create employment, generate a trained workforce, e to the development of physical and institutional infrastructure. These industries also contribute to foreign exchange earnings and stimulate investment in a ndary support industries. The main aim of the session is to look into current development of the Wood-based furniture industry against the non-wood-based develop strategies for alternative wood-based materials, design and advanced technologies for sustainable growth of using timber as a main material.
1:45PM	Paper 20: Designing the Next Wave of Furniture: Aesthetic, Material and Technology
2:10PM	Paper 21: China's Strategy in Timber Furniture Design and Standards in Meeting Export Requirements
2:35PM	Paper 22: Italian Wooden Furniture Export Strategy
3:00PM	Paper 23: Vietnamese Strategy in Wooden Furniture Industry
3:25PM	Open Forum: Comments, Questions and Answers
3:35PM	Networking & Refreshment Break
4:05PM – 4:50PM	GLOBAL TIMBER LEADERS FORUM: TIMBER INDUSTRY COLLABORATIVE FRAMEWORK UNDER THE ASEAN ECONOMIC COMMUNITY
4:50PM	CLOSING ADDRESS
5:00PM	GLOBAL TIMBER CONFERENCE 2017 ENDS
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