



Shaping The Future: **Workshop on National Timber Industry Strategic Plan (NTISP) 2026-2030**

 Developing Wood-Based
Installer Modules and
Documents for Industry
Recognition

 Strengthening CITES Compliance
Through Seminar and MyCITES
Electronic System

 Shaping a National Wood
Carving Identity

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Shaping The Future: Workshop on National Timber Industry Strategic Plan (NTISP) 2026-2030

Prepared by: Encik Husaini Ghani



The National Timber Industry Strategic Plan (NTISP) 2021-2025 is coming to an end. Thus, a new strategy is needed to ensure the future of the timber industry in Malaysia remains sustainable and competitive in the global market. To maintain the pace of a fast-growing timber market globally, MTIB is currently in the midst of creating NTISP 2026-2030. This document will act as an essential guideline for timber stakeholders for the next five (5) years.

To ensure the document is fully comprehensive and covers all matters, MTIB organised a workshop on 1 December 2025 in Bangi. The workshop was officiated by YBrs Tuan Saiful Bahri Salleh, Director-General of MTIB. In his opening remarks, YBrs Tuan Saiful Bahri Salleh emphasised the initiatives that needed to be expedited and materialised to reflect their positive and significant impact on the timber industry. He also highlighted the need to provide serious attention to the shortfalls of Malaysia's export performance, compared to the targets in NTISP 2021-2025. He urged all relevant parties to re-strategise and intensify their efforts to resolve the problems confronting the timber industry and to determine the appropriate handling mechanisms.



Tuan Saiful Bahri give his opening speech



The session commenced with an insightful presentation on the Current Status of the Malaysian Timber Industry by Ts. Farydatul Nazly Mohd. Zin, Deputy Director-General (Development & Commercial) of MTIB. Her presentation provided the necessary data-driven context to guide the day's strategic deliberations.



Ts. Farydatul Nazly Mohd. Zin giving her presentation on status of timber industry and way forward

The objective of the workshop was to map out an action plan for the timber industry based on 5 strategic thrusts. Participants were divided into technical groups for roundtable discussions to draft actionable strategies focused on five thrusts:

- Thrust 1** Raw Material and Industrial Sustainability
- Thrust 2** Technology, Innovation, and Productivity Enhancement
- Thrust 3** Human Capital Development
- Thrust 4** Market Development and Global Trade Expansion
- Thrust 5** Strengthening Bumiputera Participation

Through these roundtable discussions, MTIB aims to produce an inclusive strategic document that balances grassroots realities with high-level economic goals. This proactive planning is essential to ensure the Malaysian timber industry remains resilient, sustainable, and competitive, particularly in the face of evolving global environmental standards and IR4.0 integration.



Planery session during workshop

The session was attended by 160 participants, including representatives from the industry, government agencies, timber associations, private sector players, and MTIB officials. MTIB extended its deepest appreciation to all participants for their unwavering commitment and contribution towards the success of the workshop.

Developing Wood-Based Installer Modules and Documents for Industry Recognition

Prepared by: Ts. Norhasniza Mohd Rom

The Malaysian Timber Industry Board (MTIB), through the Wood Industry Skills Development Centre (WISDEC), successfully organised a workshop on the development of training modules and documentation for the Wood-Based Industry Installer Recognition Programme. The event was held from 12 to 14 December 2025 at the Royal Park Hotel @ UNITEN, Selangor.

The programme was officiated by YBrs. Encik Mohd Amin bin Kadir, Deputy Director-General (Management and Operations) of MTIB. In his opening remarks, he emphasised that the initiative was a vital cornerstone in strengthening installer competencies, aligning with MTIB's steadfast commitment towards elevating professionalism and industry standards within the nation's wood-based sector.

The initiative was strategically designed to establish a comprehensive framework based on Competency-Based Training (CBT). By addressing current industrial needs, the CBT approach ensures that training content meets nationally recognised skill standards while providing structured guidance for both instructors and candidates. This methodology allows for measurable competency assessments, with a primary focus on practical performance and real-world application.

Furthermore, the structured development of these modules aims to harmonise training delivery at skills training centres, effectively narrowing the gap in skill levels and workmanship quality. Standardising these reference materials is expected to facilitate better knowledge transfer, enhance instructional quality, and bolster the programme's credibility among industry players.

Key Objectives:

- **Stakeholder Synchronisation:** aligning the understanding and collaboration of industry players in developing installer documentation and competency standards
- **Market-Driven Framework:** designing training modules that respond to current job market demands and industrial evolution

- **Standardised Benchmarks:** producing high-quality, comprehensive reference materials for consistent adoption by training centres
- **Holistic Development:** bridging the gap between theoretical knowledge and on-site application to produce professional, competent, and resilient installers.

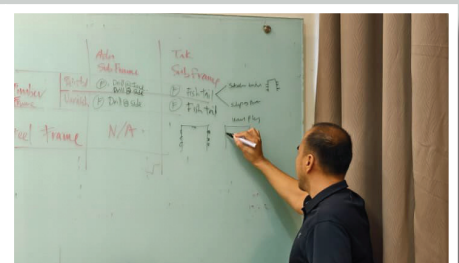
The diverse expertise and perspectives shared during the sessions contributed significantly to the robustness and relevance of the developed modules.

The feedback and insights gathered will serve as a clear roadmap for the full-scale implementation of the Installer Recognition Programme. As technology and construction practices evolve, these industry-driven modules will ensure that local installers remain relevant, competent, and future-ready.

In the long term, this recognition framework is poised to deliver a transformative impact on the industry. Recognition by MTIB serves as a trusted benchmark of quality, boosting consumer confidence in installation works that comply with national standards. Additionally, it supports the national aspiration to build a highly skilled workforce while reducing long-term maintenance costs associated with substandard workmanship.

Ultimately, this initiative reflects MTIB's dedication towards fostering a professional and sustainable installer ecosystem. By pairing premium Malaysian timber with systematic installation practices, the industry not only strengthens its global competitiveness but also secures a future defined by quality assurance and long-term sustainability.

The programme was attended by representatives from The Construction Industry Development Board (CIDB), Malaysia Wood Moulding & Joinery Council (MWMJC), Akademi Binaan Malaysia (ABM) Eastern Region, and the Terengganu Timber Industry Training Centre (TTITC), as well as officers from WISDEC.





Shaping a National Wood Carving Identity

Prepared by: Puan Anisatur Rahmah Puteri Ahmad Fadzil

The Malaysian Timber Industry Board (MTIB), through its Bumiputera Economic Empowerment Division (BPEB), organised a workshop on the Development of Malaysian Wood Carving Identity: Carving Identity, Uniting Heritage from 17 to 18 December 2025 at *Dewan Persidangan MTIB*, Menara PGRM, Kuala Lumpur. The workshop reflected MTIB's commitment towards positioning wood carving not only as a cultural heritage, but as a value-added component within the modern era of timber industry.

The workshop was officiated by YBrs. Dr. Haji Norazli Haji Ismail, Director of BPEB, MTIB. In his welcoming remarks, he highlighted the importance of product development and market-oriented strategies in ensuring higher impact outcomes under the Thirteenth Malaysia Plan (RMK-13), a continuation of the progress achieved during RMK-12.

The main focus of the programme was creating design and motif for the national wood carving identity based on the Hibiscus (*Bunga Raya*), Malaysia's national flower. The motif was explored as a unifying symbol that reflects national values while offering flexibility in the application across a wide range of wood-based products and design contexts.

Moderated by YBrs. Prof. Dr. Mohamad Hariri Abdullah, Senior Research Fellow at Taylor's University, the workshop adopted a structured approach combining traditional craftsmanship and contemporary design methods. Wood carvers initiated the process through motif sketching based on Malay wood carving principles, which were subsequently refined through digital design into vectors. Designers and entrepreneurs will then transform the vectors into potential products.

The programme also emphasised the need to modernise design approaches to ensure the long-term sustainability of wood carving art. Integrating heritage craftsmanship with contemporary aesthetics and market requirements was identified as a key factor in enhancing commercial viability without compromising cultural integrity.

Among the key outcomes of the workshop were the development of initial motif concepts for a Malaysian wood carving identity, proposed applications for timber



products, and preliminary documentation to support future development initiatives. These outputs are expected to serve as an important reference point in strengthening the role of wood carving within the national timber industry.

Overall, the workshop emphasised a step towards establishing a coherent and recognisable wood carving identity for Malaysia, maintaining the balance between heritage preservation, design innovation and industry growth.

The programme brought together wood carvers, designers and Bumiputera timber-based entrepreneurs, creating a platform for cross-disciplinary collaboration aimed at strengthening Malaysia's wood carving identity.



Strengthening CITES Compliance Through Seminar and MyCITES Electronic System

Prepared by: Puan Nik Zuraihah Nik Mohammad

The Malaysian Timber Industry Board (MTIB) successfully organised a two-day programme comprising the Seminar on CITES Compliance and Conservation of Endangered Timber Species under the International Trade in Endangered Species Act 2008 (Act 686), followed by an in-house capacity building session on the MyCITES Electronic System, at Dorsett Putrajaya Hotel on 18 - 19 December 2025.

The programme formed part of MTIB's continuous effort to strengthen regulatory compliance, governance and institutional readiness in managing international trade of CITES-listed timber species.

The first day comprise the CITES Compliance Seminar – Industry Engagement. The programme recorded an overwhelming response from the timber industry, with more than 100 participants comprising exporters, manufacturers,

traders and related stakeholders. The strong turnout reflected the industry's growing awareness and commitment towards compliance with international regulations governing the trade of endangered timber species.

“The seminar focused on enhancing participants’ understanding of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), with particular emphasis on timber species listed under the Convention. Participants were briefed on regulatory requirements under Act 686, including permit obligations, documentation procedures and traceability requirements. The participants were also informed of the importance of governance and accountability in international timber trade.”



A forum session with panel members

In officiating the seminar, the Director General of MTIB, YBrs. Tuan Saiful Bahri Salleh highlighted MTIB's role as the CITES Management Authority (MA) for timber species in Malaysia. He emphasised that compliance with CITES is not merely a legal requirement, but a strategic necessity to safeguard forest sustainability and maintain the credibility and competitiveness of Malaysia's timber products in the global market.

The seminar featured interactive discussions, allowing industry players to raise operational challenges, share practical experiences and obtain direct clarification from MTIB officers. This engagement contributed to a more practical and solution-oriented understanding of CITES implementation within the timber sector.

On the second day, the MyCITES Electronic System: Internal Capacity Building session with a dedicated in-house training was held, involving approximately 30 MTIB officers, particularly those directly involved in permit processing, verification and inspection.

MyCITES is a national online system used to manage and control the issuance of CITES permits and certificates for the import, export, and re-export of endangered wild fauna and flora. The system is administered by the Ministry of Natural Resources and Environmental Sustainability (NRES) and MTIB as one of nine (9) Management Authorities using this system. The system enables digital application processing, technical verification, inter-agency integration and trade monitoring for species listed under CITES Appendices I, II, and III, including timber and timber products. The system is fully integrated with Species+, MyDigital ID and FPX applications and will be implemented in January 2026.

MyCITES enhances regulatory compliance, transparency, efficiency and traceability while supporting sustainable and legal international wildlife trade in line with Malaysia's CITES obligations. Further, as part of MTIB's responsibilities as the CITES Management Authority, the session aimed at strengthening internal capacity and ensuring consistent



Participants interact with MTIB officers at the exhibition booth

implementation of procedures. The officers were provided with guidelines on the system, including hands-on training on workflow processes, application assessment, documentation requirements and monitoring mechanisms.

Overall, the two-day programme demonstrated MTIB's comprehensive and balanced approach to CITES implementation by combining proactive industry outreach and awareness with internal governance strengthening. The strong industry participation on the first day and focused capacity building on the second day underscored MTIB's commitment to transparent, efficient and effective management of CITES-related trade.

Through continuous engagement, training and system enhancement, MTIB remains committed towards supporting Sustainable Forest Management (SFM) and responsible timber trade thus ensuring Malaysia's standing as a trusted and credible player in the international timber market.

November 2025



Malaysia's exports of timber and timber products decreased by 5% in November 2025, reaching RM1.7 billion compared to RM1.8 billion in November 2024. The stronger monthly performance was supported mainly by higher exports of logs, plywood, veneer, mouldings, and BJC, which outweighed declines in wooden furniture, sawntimber, chipboard/particleboard, fibreboard, wooden frame and other products.

Cumulative exports for January – November 2025 amounted to RM19.7 billion, representing a 6% decrease from RM20.9 billion recorded in the corresponding period of 2024. The year-to-date contraction was driven primarily by lower exports of wooden furniture, other timber products, fibreboard, chipboard/particleboard, logs, plywood, mouldings, and veneer. Wooden furniture exports declined by 5% to RM8.5 billion. In contrast, exports of BJC rose by 7% to RM1.3 billion, while sawntimber exports increased by 2% to RM1.9 billion, helping to moderate the overall reduction in timber and timber product exports.

According to the www.globalwoodmarketsinfo.com, the European Union Deforestation Regulation (EUDR) shifts a significant share of compliance costs onto producer countries, especially in the tropical timber sector, because although EU operators hold formal due diligence obligations, exporters must supply detailed geolocation data, legality documentation and traceability proof. The study argues that this data-intensive model strains countries with limited digital infrastructure and administrative capacity, creating disproportionate burdens, particularly for smaller operators, even in regions like the Congo Basin that already operate managed concession and legality systems. Researchers warn that excessive or unmanageable compliance costs could exclude small producers, concentrate sourcing among larger firms, redirect trade to less regulated markets and raise prices and lead times for European importers, potentially undermining both market stability and environmental goals. While enhanced traceability systems could strengthen forest governance and unlock access to carbon or ecosystem finance over time, the study cautions that weak data protection frameworks in many producer countries risk creating new imbalances around data control and monetisation.

SAWNTIMBER

Export of sawntimber in November 2025 decreased by 26% in volume and 24% in value compared to the previous month. Exports totalled at 72,572 m³ worth RM148.2 million, down from 97,680 m³ valued at RM194.1 million in October 2025. Cumulative exports for January–November 2025 amounted to 1,079,657 m³ valued at RM1.9 billion, reflecting a 20% increase in volume and a 2% increase in value compared to the same period in 2024 (900,878 m³ valued at RM1.9 billion).

In the European Union, exports declined by 38% to 2,614 m³ in November 2025 compared to 4,203 m³ in October. Among member countries, the Netherlands recorded a decrease of 23% to 1,163 m³ from 1,516 m³, Belgium fell by 53% to 343 m³ from 725 m³, and Germany decreased by 28% to 357 m³ from 491 m³. Exports to other European markets dropped by 42% to 691 m³ from 1,185 m³, with the United Kingdom declining by 43% to 655 m³ from 1,150 m³ in October 2025.

In South Asia, shipments fell by 19% to 11,271 m³ from 13,912 m³ in the previous month. India recorded a decrease of 29% to 5,133 m³ from 7,213 m³, the Maldives slipped marginally by 2% to 2,338 m³ from 2,383 m³, and Sri Lanka declined by 26% to 2,290 m³ from 3,110 m³ in October.

Exports to West Asia increased slightly by 1% to 16,793 m³ from 16,599 m³ in October. The UAE recorded a decrease of 28% to 4,252 m³ from 5,879 m³, and Yemen declined by 30% to 3,489 m³ from 5,016 m³, while Oman recorded a sharp increase of 140% to 4,535 m³ from 1,893 m³.

In East Asia, exports decreased by 23% to 27,088 m³ from 34,932 m³ in October. China recorded a significant decrease of 41% to 16,587 m³ from 28,169 m³, Taiwan registered a strong increase of 115% to 6,820 m³ from 3,170 m³, while Japan fell by 12% to 2,314 m³ from 2,639 m³.

☞ Shipments to ASEAN markets declined sharply by 44% to 10,775 m³ from 19,372 m³ in October. Vietnam recorded an increase of 51% to 779 m³ from 515 m³, while Thailand decreased by 34% to 3,730 m³ from 5,663 m³, and Singapore declined by 10% to 5,380 m³ from 6,004 m³. ☞

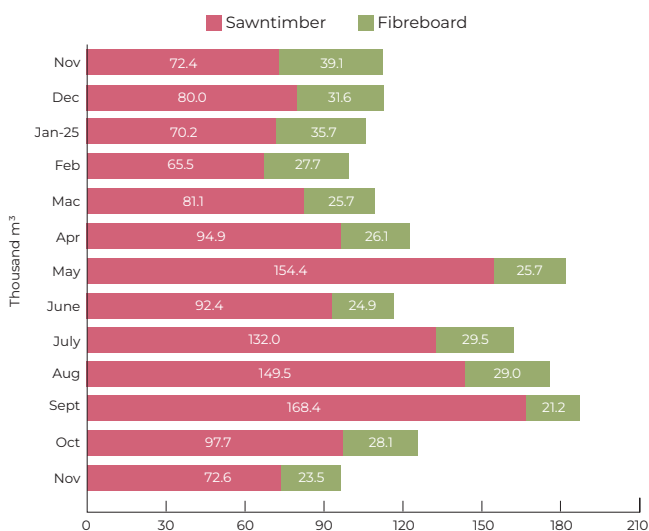
Exports to Africa dropped substantially by 82% to 644 m³ from 3,557 m³ last month. South Africa recorded a decrease of 25% to 296 m³ from 396 m³, and Mauritius declined by 55% to 243 m³ from 538 m³. Meanwhile, exports to North America decreased by 26% to 2,221 m³ from 3,018 m³, with the United States falling by 28% to 2,117 m³ from 2,948 m³.

Exports to Oceania/Pacific declined by 42% to 434 m³ from 749 m³ in October, all of which were destined for Australia, which recorded a decrease of 42% to 434 m³ from 749 m³.

The average FOB price for sawntimber in November 2025 was recorded at RM2,042 per m³, an increase of 3% from RM1,987 per m³ in October 2025. Exports of Dark Red Meranti (DRM) totalled at RM2,382 per m³, an increase of 4% from RM2,293 per m³ in October. Keruing exports declined by 8% to RM2,617 per m³, while DRM exports to the Netherlands increased by 12% to RM3,311 per m³. No trade was recorded for Redwood (UAE) in November 2025.

The German timber trade ended 2025 with a modest recovery in sawntimber sales, supported by a strong year-end performance. According to GD Holz, sawntimber sales increased by about 5% year on year, broadly in line with the overall sector's 3% growth. This late improvement, driven largely by double-digit growth in December, helped offset weak demand and rising costs that characterised most of the year, particularly as construction activity remained subdued.

Malaysia: Export of Sawn Timber and MDF



However, industry representatives stressed that the improvement in sawntimber should be seen as consolidation at a low level rather than a clear market recovery. Demand continues to be constrained by weak construction completions, cautious purchasing behaviour and macroeconomic uncertainty. While some short-term factors, such as stabilising prices and the release of pent-up demand, supported late-2025 sales, expectations for 2026 remain cautious, with most companies anticipating only stable or marginal growth in sawntimber demand.

PLYWOOD

Export of plywood in November 2025 recorded an increase of 2% in volume at 103,599 m³ and 0.3% in value to RM215.6 million as compared to the previous month. The cumulative exports for the period of January – November 2025 showed an increase of 3% in volume to 1,036,170 m³ but a 3% decrease in value totalling at RM2.1 billion over the previous corresponding period. In the East Asia market, volume improved by 7% to 54,478 m³ from 50,834 m³ in October. Japan as the largest importer from the region increased its buying by 4% to 47,622 m³, followed by South Korea and Taiwan with increases of 23% to 2,693 m³ and 65% to 3,934 m³ each. In the ASEAN region, imports dropped by 3% from 2,662 m³ to 2,592 m³. Plywood exports to Thailand and Singapore were reduced by 63% to 322 m³ and 1% to 985 m³ respectively. Brunei improved the purchase by 42% to 538 m³.

In the South Asia region, plywood purchases recorded an increase of 150% from 72 m³ to 179 m³. India and Maldives added up their plywood imports by 147% to 32 m³ and 14% to 67 m³ each. Pakistan resumed its buying with 80 m³. The West Asia region recorded an import increase of 10%

to 13,031 m³ from 11,877 m³ in the previous month. Yemen improved sales by 15% to 12,935 m³, while the UAE reduced its purchase by 60% to 96 m³.

Moving to the EU region, there was a decreasing trend for plywood exports of 7% from 5,196 m³ to 4,856 m³. Italy increased its purchase by 254% to 3,097 m³ while Spain reduced buying by 37% to 660 m³. Meanwhile, Lithuania resumed its plywood purchase to 301 m³. In other parts of Europe, exports recorded a decrease of 28% to 8,337 m³ from 11,544 m³ in the previous month. Plywood purchase by the UK decreased by 52% to 4,461 m³ while Türkiye increased buying by 74% to 3,877 m³.

“In the Africa region, plywood export recorded a decrease of 87% from 1,261 m³ to 163 m³ with sole purchases being from South Africa. The North America region increased imports by 10% from 16,097 m³ to 17,621 m³. The USA as the main buyer improved purchases by 16% to 17,306 m³. However, Mexico and Canada reduced buying by 72% to 239 m³ and 73% to 76 m³ respectively. In the Oceania/Pacific region, plywood export increased by 6% from 2,219 m³ to 2,340 m³ with purchases from Australia being at 2,255 m³.”

The FOB price of plywood for November 2025 was RM2,081 per m³, a decrease of 2% from RM2,112 per m³ from the previous month.

In November 2025, Lithuania's construction landscape was notably influenced by strategic shifts in regulatory and industrial activities when the government launched the Investment Highway initiative, which streamlined planning and permits for data center projects and halved pre-construction timelines, significantly boosting infrastructure development momentum in digital construction sectors like hyperscale data centers, leveraging renewable energy and robust grid access to attract investment and accelerate build-outs. Concurrently, large-scale industrial construction advanced with the groundbreaking of a major €141 million artillery ammunition plant in Baisogala, one of the country's largest defense industry projects to expand NATO-aligned production capacity, reflecting broader public-sector infrastructure expansion. These developments suggest Lithuania's construction industry in late 2025 was characterised by accelerated digital and industrial projects backed by regulatory reforms and targeted investment incentives.

VENEER

Export of veneer in November 2025 decreased in volume by 4% to 3,040 m³ but recorded a 5% increase in value worth RM7.4 million as compared to the previous month. Meanwhile, the cumulative export for January – November 2025 showed a decrease in both volume and value by 48% to 26,864 m³ and 42% to RM57.3 million over the previous corresponding period.

ASEAN recorded a decrease in veneer import by 75% from 214 m³ to 53 m³. Singapore reduced its purchase by 43% to 8 m³ while Viet Nam resumed buying with 46 m³. In East Asia, imports increased by 33% from 794 m³ to 1,053 m³. Japan and South Korea reduced their veneer imports by 78% to

96 m³ and 57% to 126 m³ respectively. In Taiwan, veneer purchases surged dramatically from 42 m³ to 792 m³. In the South Asia region, veneer sales declined by 44% to 796 m³ from 1,417 m³ in the previous month, with India recording a decrease of 48% to 663 m³ while Bangladesh saw a slight increase of 1% to 133 m³.

“Moving to North America, veneer imports increased by 153% to 954 m³ from 377 m³. The USA and Canada improved their buying by 95% to 655 m³ and 630% to 299 m³ respectively. The Oceania/Pacific region also increased its purchases by 7% to 153 m³ with purchases being from Australia while the EU did not make any purchase for the month. Meanwhile, South Africa reduced its purchases by 87% to 31 m³ with the sole purchase bring from South Africa.”

The average FOB price for veneer increased by 9% from RM2,220 per m³ to RM2,424 per m³ as compared to the previous month.

Taiwan's construction industry was marked by exceptionally strong public construction spending, with government outlays reaching NT\$602.8 billion (USD19.1 billion) for that month alone as part of an annual public construction budget that, including supplementary allocations, surpassed NT\$800 billion, the highest pace in roughly two decades, reflecting continued priority on infrastructure and industrial projects. Major works completed or advanced at year-end included the trial operation of the expanded northern concourse at Taiwan Taoyuan International Airport Terminal 3, which increases capacity with eight new large gates and logistics enhancements like a new cold-chain center in Banqiao to boost produce throughput and storage, demonstrating investments in both transport and supply-chain infrastructure. Broader industry context for 2025 shows the construction sector expanded in tandem with Taiwan's overall infrastructure agenda, with output growth supported by transport, housing, renewable energy and commercial developments and expected continuation of this momentum into future years.

MEDIUM DENSITY FIBREBOARD (MDF)

Export of MDF in November 2025 recorded a 16% decrease in volume at 23,535 m³ and a 15% decrease in value at RM46.3 million compared to the previous month. Likewise, the cumulative export for the period of January – November 2025 recorded a decrease in volume of 22% to 294,781 m³ and also in value of 20%, totalling at RM557.1 million as compared to the corresponding period in 2024.

MDF export to ASEAN decreased by 35% from 4,872 m³ to 3,173 m³ in the previous month. The Philippines, Indonesia and Viet Nam reduced their imports by 10%, 60% and 69% to 2,215 m³, 432 m³ and 371 m³ respectively.

Elsewhere, East Asia purchases of MDF also decreased by 20% from 13,021 m³ to 10,375 m³ in the previous month. Imports of MDF from Japan and South Korea recorded a decrease of 18% and 75% to 9,658 m³ and 214 m³ each. Taiwan added up sales by 20% to 474 m³. Moving to the South Asia market, export declined by 32% from 2,020 m³ to 1,370 m³.

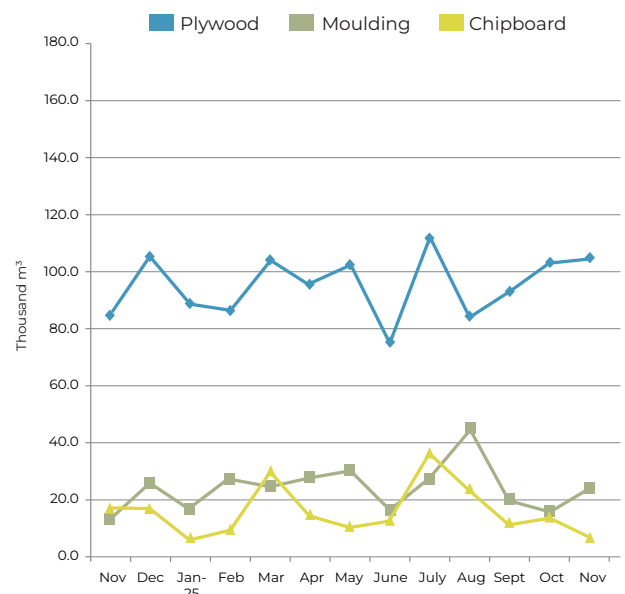
Export performance to Pakistan increased by 10% to 978 m³ while India reduced by 64% to 392 m³. Meanwhile, Nepal did not make any purchases for the month.

“Export to the West Asia region recorded an increase of 33% from 3,305 m³ to 4,380 m³ compared to previous month. The UAE and Oman increased their purchases by 153% to 3,584 m³ and 577% to 474 m³ respectively. Qatar reduced its purchase by 3% to 290 m³. On the other hand, no purchases of Malaysian MDF were recorded from the European Union, Central America, South America and Africa regions during the month. However, MDF purchase was made by the UK under the other parts of Europe category, increasing by 92% to 119 m³.”

Export to the Oceania/Pacific region decreased by 15% to 1,858 m³ from 2,184 m³. Australia and New Zealand both reduced their purchases by 14% to 1,814 m³ and 49% to 44 m³ respectively. MDF import by North America also decreased by 11% from 2,511 m³ to 2,239 m³ compared to the previous month. MDF purchases by the USA and Mexico decreased by 0.1% to 1,467 m³ and 55% to 284 m³ respectively.

The average FOB price of MDF increased by 2%, from RM1,939 per m³ to RM1,968 per m³ compared to the previous month.

Malaysia: Export of Major Timber Product
November 2024 – November 2025^P



In November 2025, the construction industry in the UAE was on a solid growth trajectory, projected to expand by 5.2% in real terms in 2025, underpinned by strong public and private investment in energy, utilities, transport and power infrastructure. The sector benefited from the federal 2025 Budget allocation of AED71.5 billion (USD19.5 billion), an 11.6% increase over 2024 while momentum toward year-end was reinforced by the rollout of major industrial projects, notably by the AED36.7 billion Erisha Smart Manufacturing Hub in Ras Al-Khaimah Economic Zone, which commenced construction in September 2025. Forward visibility remains positive, as the Cabinet has already approved a significantly higher AED92.4 billion (USD25.2 billion) federal budget

for 2026 under the 2022 – 2026 plan, signalling continued fiscal support. Medium-term expansion is further anchored by structural policy framework such as the National Agenda for Entrepreneurship and the National Investment Strategy 2031, which aim to boost industrial development, manufacturing capacity, housing supply and foreign direct investment inflows, positioning the UAE construction sector for sustained average annual growth of around 4% through 2029.

MOULDINGS

The export of mouldings in November 2025 increased by 9% in volume, reaching 21,110 m³, and similarly increased by 4% in value, amounting to RM67.9 million as compared to October 2025. For the cumulative period of January to November 2025, exports of mouldings dropped in volume and value by 4% to 0.2 million m³ and by 5% worth RM810.1 million from RM855.6 million in the same period in 2024.

Exports to ASEAN countries decreased by 25% to 794 m³ in November 2025, dropped from 1,053 m³ in October 2025. Exports to Singapore declined by 30% to 643 m³, while exports to Viet Nam increased by 31% to 152 m³ from the previous month.

In the East Asia region, exports of mouldings were recorded at 1,814 m³ in November 2025, an increase of 54% from 1,180 m³ in the previous month. Exports to Japan and South Korea increased by 33% to 917 m³ and 32% to 506 m³, respectively. Similarly, exports to Hong Kong improved significantly by 202% to 127 m³ from 42 m³ in October 2025.

In the South Asia region, export volume showed a downward trend; intake was down by 70% to 51 m³ in November 2025 compared to the previous month. Exports to Maldives decreased by 49% to 26 m³, while India decreased its intake by 83% to 21 m³ for the month. Exports to the West Asia region rose by 167% from 24 m³ in October to 64 m³ in November, supported primarily by the UAE, which increased its purchases by 92% to 46 m³ over the same period.

“Exports to the EU decreased by 36% to 3,166 m³ in November 2025 compared to 4,942 m³ in October 2025. Exports to the Netherlands dropped by 47% to 1,529 m³ from 2,881 m³ in the previous month. Similarly, exports to France dropped by 11% to 758 m³, while exports to Germany grew by 1% to 391 m³. In contrast, intake from the UK weakened by 22% to 334 m³ for the month.”

In the Oceania/Pacific region, total export of mouldings decreased by 7% to 1,322 m³ in November 2025 from 1,421 m³ in October 2025, all of which were purchased by Australia, with exports declined by 6% to 1,322 m³ from 1,405 m³ previously. Meanwhile, in North America, total export improved by 39% to 13,239 m³ from 9,547 m³ in October 2025. Export to the USA grew by 39% to 12,974 m³, while exports to Canada increased by 9% to 265 m³ from 243 m³ in the previous month.

In the Africa region, total export decreased by 34% to 326 m³ compared to 494 m³ in October 2025. Exports to Mauritius dropped by 19% to 285 m³ while exports to South Africa also declined by 71% to 41 m³ for the month.

The average FOB unit value for mouldings in November 2025 declined by 5% to RM3,219 per m³ compared to RM3,374 per m³ in October 2025.

According to USA-based Dodge Construction Network, total construction starts were down 20.5% in November to a seasonally adjusted annual rate of USD1.22 trillion. Non-residential building starts fell by 13.4%, residential starts increased 13.3%, and non-building starts dropped 43.7% over the month. On a year-to-date basis through November, total construction starts were up 5.1% from last year. Non-residential starts were up 4.7%, residential starts were down 4.9% and non-building starts were 17.5% higher over the same period. For the 12 months ending November 2025, total construction starts were up 5.7% from the 12 months ending November 2024. Residential starts were down 3.6%, non-residential starts grew 4.8%, and non-building starts were up 18.0% over the same period.

“A lack of megaproject activity contributed to a weak November for construction starts. There were only 2 structures over a billion dollars. Looking through the noise of the last two months, the trajectory of the last half of 2025 has been much better than the first half,” stated Mr. Eric Gaus, Chief Economist at Dodge Construction Network. Residential building starts rose by 13.3% in November to a seasonally adjusted annual rate of USD368 billion. Single family starts increased 3.1%, while multi-family starts jumped 35.6%. On a year-to-date basis through November, residential starts are down 4.9% – with single family starts down 12.8% and multifamily starts up 12.4%. For the 12 months ending November 2025, total residential starts fell 3.6%. Single family starts fell 11.2% compared to the 12 months ending November 2024, and multifamily starts increased 12.4% over the same period.

Non-residential building starts decreased by 13.4% in November to a seasonally adjusted annual rate of USD485 billion. Commercial starts were down 25.8%, alongside declines in offices and data centres (-40.5% m/m) and hotels (-33.2% m/m). Meanwhile, parking garages (30.5% m/m), retail stores (8.3% m/m) and warehouses (6.4% m/m) posted growth between October and November. Institutional starts improved 11.4%, driven by gains in public (+78.8% m/m) and education buildings (+32.1% m/m) – but offset by declines in amusement (-51.8% m/m) and dormitories (-45.9% m/m). Manufacturing activity remains volatile, falling 50.7% in November. On a year-to-date basis through November, non-residential starts are up 4.7% compared to the first eleven months of 2024. Commercial and industrial starts are up 11.6% and institutional starts are down 2.0% over the same period. For the 12 months ending November 2025, total non-residential starts were up 4.8% compared to the 12 months ending November 2024. Commercial starts were up 19.9%, institutional starts declined 1.5%, and manufacturing starts were down 13.7% over the same period.



BUILDERS JOINERY AND CARPENTRY (BJC)

The total export of builders' joinery and carpentry (BJC) in November 2025 increased by 0.2% in volume to 13.1 million kg and by 1% in value to RM121.3 million, and similarly for the cumulative period of January – November 2025, export of BJC increased by 11% in volume to 141.6 million kg and 7% in value worth RM1.3 million as compared to the previous corresponding period of 2024.

Shipments of BJC to ASEAN were valued at RM78.7 million, a decrease of 36% from RM123.1 million in the same corresponding period in 2024. Singapore as the main buyer decreased its purchases by 50%, valued at RM43.5 million as compared to the previous year. Similarly, there was a cutback in exports to Viet Nam by 22% worth RM9.7 million. Nevertheless, export to Thailand rose by 8% worth RM15.2 million for the period January to November 2025.

As for the East Asia region, exports shrunk by 8% from RM82.4 million to RM76.1 million. Japan as the main buyer from this region decreased its purchases by 9% to RM53.6 million from RM58.7 million over the same corresponding period. Similarly, exports to China and Taiwan also dropped by 9% worth RM10.5 million and by 23% to RM5.7 million respectively.

Exports to South Asia totalled at RM22.0 million, a decline of 37% from RM35.1 million in the corresponding period of 2024. India and Maldives decreased their purchases by 30% to RM15.4 million and by 32% to RM3.6 million respectively. Similarly, Sri Lanka dropped its purchases by 59% from RM4.6 million to RM1.9 million for the period of January - November 2025.

As for the West Asia region, the total export of BJC dropped by 4%, totalling at RM12.5 million as compared to the amount of RM13.0 million in the same corresponding period in the previous year. The main buyer from this region was Saudi Arabia with a total purchase of RM10.1 million at an increase of 1%, while demand from Kuwait dropped by 84% to RM96,119 for the stated period. Similarly, export to the UAE dropped by 4% to RM2.2 million from RM2.3 million in the period of January – November 2024.

The total exports of BJC to the European Union region rose by 13%, increasing from RM231.5 million to RM260.8 million. Intake from Belgium increased by 25% worth RM94.2 million, followed by the Netherlands, where exports improved by 12% worth RM86.6 million. Similarly, intake from Germany grew by 40% to RM16.2 million for the stated period. Meanwhile, the exports to the other parts of Europe declined by 10% to RM124.4 million. The United Kingdom decreased its intake by 5% to RM119.2 million. Purchases from Norway also dropped by 65% to RM4.2 million. Meanwhile purchases from Türkiye increased by 31% to RM1.1 million for the respective period.

Shipments to the Oceania/Pacific region decreased by 6% from RM299.8 million to RM216.9 million. Australia as the main buyer reduced its purchases by 5% to RM197.3 million from RM207.8 million in the corresponding period of the previous year. Similarly, New Zealand lowered its intake by 13% to RM15.4 million while exports to American Samoa increased by 108% to RM1.4 million for the stated period.

Shipments to North America increased by 45%, amounting to RM496.4 million whereas the USA as the main buyer from this region increased its purchases by 45% to RM489.5 million. Similarly, intake from Canada grew by 2% to RM6.2 million. Meanwhile, Brazil resumed its intake with RM61,150 for the period.

“Shipments to Africa on the other hand, decreased by 27% to RM7.7 million in the period of January – November 2025. There was a decrease in exports of BJC to South Africa of 12% from RM5.3 million to RM4.6 million. Similarly, Seychelles dropped its purchases by 42% to RM1.0 million, while Morocco increased its intake by 619% worth RM0.9 million for the cumulative period of January – November 2025.”

Statistics Canada reported that the total value of investment in Canada's building construction increased by 9.7% to CAD24.5 billion in November 2025. This increase partly stems from October's rise of 14.9% in the total value of building permits, reflecting a lag in converting permit issuance into on-site construction investment. The residential sector rose 13.3% in November, and the non-residential sector was up 1.4%. Year over year, investment in building construction grew 16.6% in November. On a constant dollar basis (2023=100), the total value of investment in building construction rose 9.6% from the previous month to CAD22.7 billion in November and was up 13.0% year over year. Investment in residential building construction rose CAD2.1 billion to CAD17.6 billion in November. This increase was primarily attributed to the multi-unit component (+20.1%), followed by the single-family component (+5.0%). In November, multi-unit investment increased by CAD1.7 billion to CAD10.2 billion. The growth in multi-unit investment was driven by Ontario (+CAD1.4 billion), followed by Quebec (+CAD233.9 million) and Alberta (+CAD108.2 million). Overall, seven provinces and three territories contributed to this increase.

Investment in single-family home construction rose CAD351.6 million to CAD7.4 billion in November. Ontario (+CAD125.7 million) and British Columbia (+CAD110.8 million) led the increase, supported by broad gains across six other provinces and the three territories. In November, the value of non-residential investment in building construction increased by CAD93.0 million to \$6.9 billion. Increases in the commercial (+2.7%) and institutional (+0.4%) components were moderated by a decline in the industrial component (-0.5%). Investment in the commercial component rose CAD91.4 million to CAD3.5 billion in November. The increase was primarily driven by Ontario (+CAD43.9 million) and Alberta (+CAD18.9 million), with gains recorded in six other provinces as well as in two territories. Meanwhile, investment in institutional construction increased CAD8.5 million to \$2.1 billion in November. Gains in British Columbia (+CAD14.8 million) and Alberta (+CAD10.5 million) were tempered by a decrease in Ontario (-CAD17.2 million). Investment in the industrial component declined CAD7.0 million to CAD1.3 billion in November, marking the 10th consecutive monthly decrease. Declines were recorded in seven provinces and two territories, with the largest decline seen in Ontario (-CAD6.4 million).

FURNITURE

• Wooden Furniture

The total export value of wooden furniture for the period of January–November 2025 amounted to RM8.5 billion, reflecting a decline of 5% compared to RM9.0 billion recorded during the corresponding period in 2024. This contraction indicates a continued moderation in Malaysia's wooden furniture export performance over the first eleven months of 2025. On a monthly basis, export value in November 2025 stood at RM770.3 million, representing a month-on-month decrease of 6% compared to RM817.7 million registered in October 2025, suggesting a slight easing in export momentum toward the end of the period.

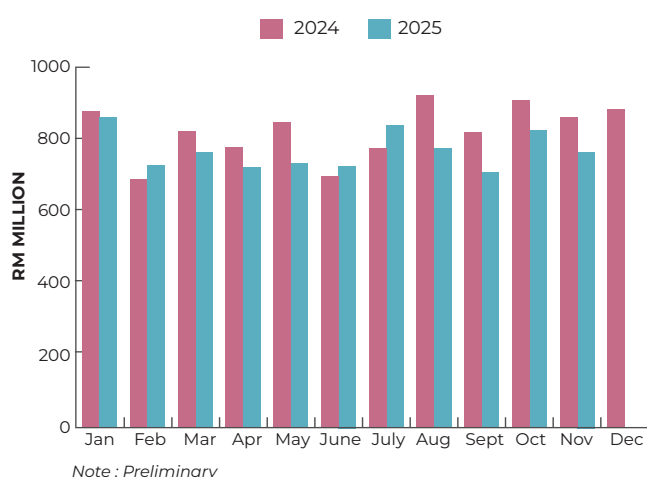
Exports of wooden furniture to ASEAN declined 6% (RM43 million) to RM1.1 billion in January–November 2025. Singapore remained the largest market in the region, with exports increasing by 6% to RM708.1 million, reflecting resilient demand. Meanwhile, exports to the Philippines declined significantly by 19% to RM193.0 million, while shipments to Indonesia fell sharply by 38% to RM62.2 million, indicating weaker import demand from selected regional markets.

Shipments to East Asia contracted by 3% to RM504.4 million from RM520.9 million in the same period of 2024. Japan continued to dominate as the principal destination, with exports edging up marginally by 1% to RM405.0 million. Exports to Taiwan recorded a stronger increase of 10% to RM49.8 million, while shipments to the Republic of Korea declined sharply by 30% to RM21.4 million, reflecting subdued market conditions.

In South Asia, exports of wooden furniture declined slightly by 2% to RM151.4 million compared with RM154.7 million in the corresponding period of 2024. India remained the key market in the region, with exports increasing by 2% to RM142.9 million. However, exports to the Maldives and Sri Lanka declined markedly by 40% and 29%, amounting to RM6.4 million and RM1.3 million, respectively.

Exports to Central Asia declined by 21% to RM3.0 million from RM3.8 million in the previous year. Kazakhstan remained the main market, accounting for RM2.8 million, although this represented a decrease of 12%. Azerbaijan recorded new shipments valued at RM147 thousand, while exports to Armenia fell substantially by 59% to RM68 thousand.

Malaysia: Export of Wooden Furniture



In West Asia, total export of wooden furniture was valued at RM435.7 million in January–November 2025, reflecting a contraction of 7% compared to RM469.3 million in the same period in 2024. Exports to the United Arab Emirates declined by 18% to RM173.1 million, while Saudi Arabia recorded a marginal increase of 1% to RM161.0 million. Exports to Oman remained broadly stable, easing slightly by 1% to RM23.1 million, indicating steady demand from selected Gulf markets.

Exports of wooden furniture to the European Union amounted to RM291.0 million during the period of January–November 2025, representing a decline of 18% compared to RM354.2 million recorded in the corresponding period of 2024. Within the bloc, Spain recorded an increase of 7% to RM43.8 million, while exports to Germany declined by 4% to RM40.6 million. Exports to France remained broadly stable, edging up marginally by 0.2% to RM38.5 million.

Exports to other parts of Europe decreased by 9% to RM437.5 million from RM478.0 million in the same period in 2024. The United Kingdom remained the dominant market, although exports fell by 6% to RM409.9 million. Shipments to Georgia decreased by 8% to RM8.8 million while exports to Turkey contracted sharply by 48% to RM7.5 million, reflecting a significant pullback in demand.

“In the Oceania/Pacific region, exports of wooden furniture declined by 16% to RM460.7 million compared to RM547.1 million in the corresponding period in 2024. Australia remained the principal market, despite exports falling by 16% to RM401.8 million. In contrast, exports to New Zealand increased by 7% to RM37.1 million, while shipments to Fiji rose by 10% to RM7.8 million, indicating firmer demand in selected Pacific markets.”

Exports to Central America declined substantially by 32% to RM32.9 million from RM48.4 million in the same period in 2024. Exports to Panama fell by 10% to RM13.2 million, while shipments to Guatemala declined by 14% to RM7.6 million. Exports to El Salvador recorded a sharper contraction of 33%, amounting to RM6.4 million.

In North America, the total export of wooden furniture amounted to RM4.9 billion during January–November 2025, reflecting a decline of 2% compared to RM5.0 billion in the corresponding period in 2024. The United States remained the largest market, with exports easing by 2% to RM4.4 billion, while shipments to Canada edged down by 1% to RM383.2 million. In contrast, exports to Puerto Rico rose sharply by 48% to RM75.1 million, albeit from a lower base.

Exports to South America declined by 20% to RM77.2 million from RM95.9 million in the same period in 2024. Shipments to Chile fell by 28% to RM37.6 million, while exports to Peru declined by 31% to RM12.9 million. Conversely, exports to Venezuela more than doubled, surging by 128% to RM7.7 million, reflecting a low base effect.

In Africa, exports of wooden furniture were valued at RM135.7 million for January–November 2025, representing a decline of 9% compared to RM149.0 million in the same period in 2024. Exports to South Africa decreased by 8% to RM42.2 million, while shipments to Réunion Island declined by 8% to RM11.9 million. Exports to Mauritius fell more sharply by 34% to RM10.3 million, indicating softer demand across key African markets.

• Rattan Furniture

The total export value of rattan furniture for the period of January–November 2025 amounted to RM0.9 million, reflecting a sharp decline of 49% compared to RM1.7 million recorded during the corresponding period in 2024. This significant contraction indicates a substantial weakening in Malaysia's rattan furniture export performance over the first eleven months of 2025. On a monthly basis, export value in November 2025 stood at RM80,729, representing a month-on-month increase of 4% compared to RM77,398 registered in October 2025, suggesting a modest short-term improvement despite the overall downward trend.

Exports of rattan furniture to ASEAN totalled at RM610,882 million during the period of January–November 2025, representing a sharp decline of 52% compared to RM1.3 million recorded in the corresponding period in 2024. Singapore remained the largest market in the region, although exports fell significantly by 72% to RM247,792. In contrast, shipments to Thailand increased by 13% to RM225,597, while exports to the Philippines declined by 13% to RM132,429, reflecting mixed demand conditions within the region.

No exports of rattan furniture were recorded to Central Asia during January–November 2025, unchanged from the same period in 2024, reflecting the absence of market activity in the region.

“Exports to East Asia increased markedly to RM57,643 from RM15,373 in the same period in 2024, representing a substantial increase of 275% from a low base. Taiwan and Japan recorded new shipments valued at RM51,749 and RM5,894, respectively, while exports to China declined by 100%, with no shipments recorded during the period under review.”

In South Asia, exports contracted by 52% to RM13,704 compared to RM28,721 in the corresponding period of 2024, with India remaining the sole destination in the region.

Meanwhile, exports to West Asia declined by 23% to RM7,805 from RM10,099 in the same period in 2024, entirely attributed to lower shipments to the United Arab Emirates.

Shipments to the EU decreased by 12% to RM3,505 during January–November 2025, compared to RM4,000 recorded in the corresponding period in 2024. The Netherlands recorded new shipments valued at RM3,505, while exports to Germany declined by 100%, reflecting the absence of shipments during the review period.

Exports to other parts of Europe increased by 26% to RM1,751 during January–November 2025, with Switzerland as the sole destination, compared to RM1,388 in the same period in 2024.

Exports of rattan furniture to Oceania/Pacific declined sharply by 50% to RM179,536 during January–November 2025, compared to RM360,777 recorded in the same period in 2024. Australia remained the dominant market in the region, accounting for RM174,108, although exports to the country fell by 51%. In contrast, New Zealand and Papua New Guinea recorded new shipments valued at RM5,405 and RM23, respectively, representing new market entries during the review period.

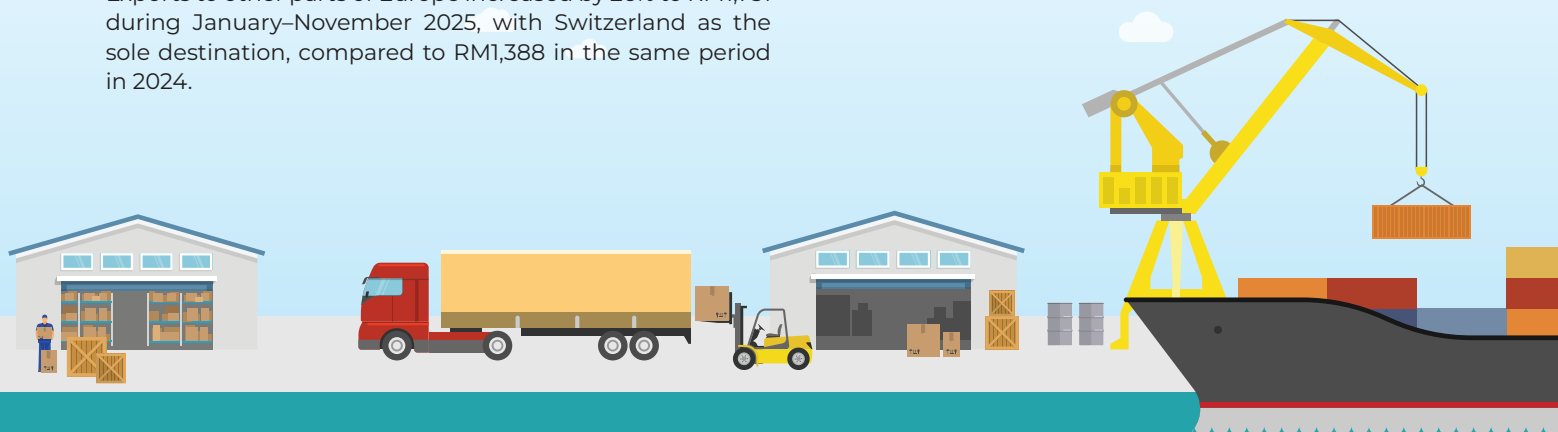
No exports of rattan furniture to Central America were recorded during January–November 2025, unchanged from the same period in 2024, reflecting the absence of market activity in the region.

Exports of rattan furniture to North America recorded new shipments amounting to RM80 during January–November 2025, with the United States as the sole destination, compared to no exports in the corresponding period in 2024.

“No exports of rattan furniture were recorded to South America and Africa during January–November 2025, unchanged from the same period in 2024, reflecting the absence of market activity in these regions.”

According to the Furniture Today report, U.S. manufacturing activity ended 2025 on a weak footing, with the Institute for Supply Management's Manufacturing PMI remaining below the 50-point threshold for the tenth consecutive month in December, signalling continued contraction across the factory sector. Furniture and related products were among the industries experiencing this downturn, with new orders declining for the fourth straight month and business sentiment subdued as both domestic and export demand remained lacklustre. Cost pressures from elevated raw material prices and uncertainty around trade policies were cited as key factors squeezing margins and undermining confidence among manufacturers as the year drew to a close.

The report also highlighted ongoing softness in employment and inventories within the furniture sector, with reductions in staffing and declining stock levels suggesting that firms are trimming operations in response to weak order books. Despite the broader economy continuing to expand, furniture manufacturers have grappled with persistent headwinds throughout 2025, including rising input costs and tariff-linked uncertainties that cloud their outlook for 2026.





Positioning in **CANADA**

Timber Market Opportunities Ahead



Overview

Canada is one of the world's most advanced economies and is ranked as the ninth largest in nominal GDP. As a member of the G7 and G20, it plays an important role in global trade and investment flows. According to projections by the Organisation for Economic Co-operation and Development (OECD), global GDP growth is expected to ease slightly in the coming years, from 3.2 percent in 2024 to 3.1 percent in 2025 and 3.0 percent in 2026, with trade restrictions and geopolitical uncertainties continuing to weigh on global investment sentiment.

International trade remains central to Canada's economic structure, with the country positioned as the ninth largest exporter and eleventh largest importer of goods globally. Its export profile is anchored in natural resources, including crude oil, petroleum products, timber, and minerals, while manufacturing sectors such as automotive, aerospace, and machinery also contribute significantly. Canada is among the world's leading producers of softwood lumber, pulp, and paper, highlighting the importance of the forestry sector in supporting both trade performance and industrial activity.

Canada's broader economic stability, supported by strong institutions, diversified industries, and well-developed trade partnerships, creates a solid foundation for the growth of its timber sector. Sustained demand from key economic segments, including construction, infrastructure development, and manufacturing, continues to drive domestic consumption of timber products. This trend is especially evident in provinces such as British Columbia, Quebec, and Ontario, where forestry plays an essential role in regional economies.

These economic strengths enable Canada to maintain its position as a major global supplier of wood products. The sector benefits from advanced sustainable forest management practices, efficient supply chain networks, and ongoing investment in modern processing technologies. Strong external demand, particularly from the United States, China, and Japan, combined with stable domestic market requirements, supports continued production growth, employment creation, and export earnings across Canada's forestry and timber value chain.

Forest Production

According to Natural Resources Canada, Canada has about 369 million hectares of forest, representing roughly 9% of the world's total forested land. The national forest area has remained stable over recent decades, as afforestation and regeneration after harvest or natural disturbances largely balance out deforestation. Canada's forests are predominantly publicly owned, providing a foundation for sustainable management and long-term resource planning. In terms of timber resources, the national inventory estimates there are approximately 50.4 billion cubic metres of wood volume in Canada's forests, with about 72% contained in coniferous forests and the remainder in mixedwood and broadleaf forests. A substantial portion of Canada's forest land, roughly 160 million hectares, is certified under third-party sustainable-forestry standards, primarily the Forest Stewardship Council (FSC) and the Programme for the Endorsement of Forest Certification (PEFC) ensuring that timber harvesting follows best practices for sustainability, biodiversity protection, and regeneration. These managed forests continue to support Canada's timber industry, contributing significantly to exports, employment, and economic development.

Canada's timber industry recorded fluctuations across key products between 2020 and 2024, reflecting evolving market demand and resource management practices. Production of sawlogs and veneer logs (coniferous) remained high at 111–112 million m³ from 2020 to 2022 before declining to 100 million m³ in 2023 and further to 86.7 million m³ in 2024. Similarly, sawnwood (coniferous) output decreased from 40.2 million m³ in 2021 to 34.2 million m³ in 2023, with a slight recovery to 34.5 million m³ in 2024. Wood chips and particles remained relatively stable, fluctuating between 13.6 million and 14.6 million m³ over the period, while particleboard production peaked at 1.65 million m³ in 2021 before declining to 1.40 million m³ in 2024. Production of plywood and Laminated Veneer Lumber (LVL) remained broadly stable at around 1.6 million m³, although slightly lower at 1.56 million m³ in 2024. Wood fuel (coniferous) increased from 600,426 m³ in 2020 to 762,442 m³ in 2023 before easing to 733,548 m³ in 2024, while veneer sheets remained stable at about 581,480 m³ annually. Meanwhile, other industrial roundwood (coniferous) declined to 189,105 m³ in 2024, and LVL, introduced in 2022 at 198,000 m³, decreased to 39,922 m³ by 2024. In the panel sector, medium/high density fibreboard (MDF/HDF) production fell from 1.16 million m³ in 2021 to 979,500 m³ in 2024, while other fibreboard remained unchanged at 100,000 m³ throughout the period.

Production of sawnwood, wood chips, and veneer logs continues to support traditional construction and panel products, while engineered wood products such as plywood and LVL have become increasingly important in structural applications. Particleboard, fibreboard, and veneer sheets also maintain a consistent presence in the market, reflecting ongoing innovation and adaptation to both domestic construction needs and global demand. This evolving product mix demonstrates Canada's capacity to maximise value from its forests while meeting modern timber and wood-product requirements.

Canada: PRODUCTION OF TIMBER PRODUCTS, 2020-2024

Products	Unit	2020	2021	2022	2023	2024
Sawlogs and veneer logs, coniferous	m ³	111,000,000	112,000,000	112,000,000	100,000,000	86,698,200
Sawnwood, coniferous	m ³	39,400,000	40,200,000	36,400,000	34,200,000	34,483,680
Wood chips and particles	m ³	13,600,000	14,200,000	13,700,000	14,600,000	13,698,000
Particle board	m ³	1,416,000	1,646,738	1,624,577	1,608,000	1,401,190
Plywood and LVL	m ³	1,672,000	1,698,230	1,603,540	1,604,000	1,559,000
Wood fuel, coniferous	m ³	600,426	686,409	686,409	762,442	733,548
Veneer sheets	m ³	581,479	581,479	581,479	581,479	581,480
Other industrial roundwood, coniferous (production)	m ³	268,285	319,345	319,345	263,096	189,105
Laminated Veneer Lumber (LVL)	m ³	0	0	198,000	198,000	39,922
Medium/high density fibreboard (MDF/HDF)	m ³	1,100,000	1,158,997	1,086,586	958,500	979,500
Other fibreboard	m ³	100,000	100,000	100,000	100,000	100,000

*FAO Estimate, Source: FAO Stats

Canada Timber Trade Performance

In 2024, Canada exported a total of USD 18.14 billion worth of timber and timber products to the world, compared to USD 18.22 billion in 2023. Sawntimber continued to dominate exports, valued at USD 6.65 billion, underscoring its key role in Canada's timber trade. This was followed by wooden furniture, with exports worth USD 3.12 billion, showing a slight decline from the previous year. Other significant export categories included chipboard/particleboard at USD 2.38 billion and builders' joinery and carpentry (BJC) products at USD 1.62 billion, while seat and parts thereof, plywood, fibreboard, logs, veneer, mouldings, and other timber products collectively contributed to Canada's diversified timber export portfolio.

Canada: EXPORT OF TIMBER & TIMBER PRODUCTS, 2020-2024

USD '000

Product label	2020	2021	2022	2023	2024
Sawntimber	7,753,054	13,446,263	10,845,277	6,524,616	6,647,923
Wooden Furniture	2,366,956	2,705,830	3,237,531	3,218,251	3,122,034
Chipboard/Particleboard	1,996,077	4,107,170	3,374,821	2,114,065	2,375,557
Builders Joinery & Carpentry	1,255,816	1,700,798	1,964,544	1,692,950	1,617,804
Seat and parts thereof	1,400,975	1,550,056	1,736,100	1,606,642	1,473,581
Plywood	368,984	520,069	543,999	488,654	488,118
Fibreboard	336,975	440,542	575,257	446,393	429,731
Logs	347,983	518,359	533,164	478,364	420,398
Veneer	264,140	412,970	448,619	325,802	330,520
Mouldings	148,451	213,763	203,590	178,989	177,693
Others	958,913	1,168,390	1,269,627	1,150,011	1,056,049
TOTAL	17,198,324	26,784,210	24,732,529	18,224,737	18,139,408

Source: ITC Stats, UN Comtrade

In 2024, Canada exported a total of USD 13.54 billion worth of timber and timber products (HS Code 44) globally. The top five destinations were led by the United States of America at USD11.67 billion, followed by Japan at USD619 million, China at USD420 million, the United Kingdom at USD 191 million, and the Republic of Korea at USD93 million, accounting for most of Canada's timber exports. Malaysia ranked 26th among 176 countries, with exports valued at USD3.70 million, highlighting its relatively small share in Canada's global timber trade despite consistent trade activity over the past five years.

Canada: EXPORT OF TIMBER & TIMBER PRODUCTS (HS CODE 44) BY COUNTRY, 2020-2024

USD '000

RANK	COUNTRIES	2020	2021	2022	2023	2024
	World	13,430,392	22,528,323	19,758,899	13,399,842	13,543,792
1	United States of America	11,321,182	19,415,012	17,113,595	11,538,538	11,672,277
2	Japan	574,488	1,202,043	1,091,917	703,080	618,821
3	China	710,632	687,298	478,964	409,999	419,900
4	United Kingdom	262,152	294,563	241,659	138,236	190,635
5	Korea, Republic of	77,704	148,169	124,637	82,365	92,976
6	Philippines	59,829	159,416	107,659	74,227	85,668
7	Germany	13,664	28,755	28,742	33,052	65,048
8	Taipei, Chinese	57,533	129,759	88,221	63,018	58,249
9	France	17,862	25,424	34,358	49,691	43,101
10	New Zealand	27,509	50,566	65,790	17,770	38,511
26	Malaysia	4,521	10,849	12,154	8,185	3,702
	Others	303,319	376,466	371,203	281,677	254,906

Malaysia ranked 26th from 176 countries
Source: ITC Stats, UN Comtrade

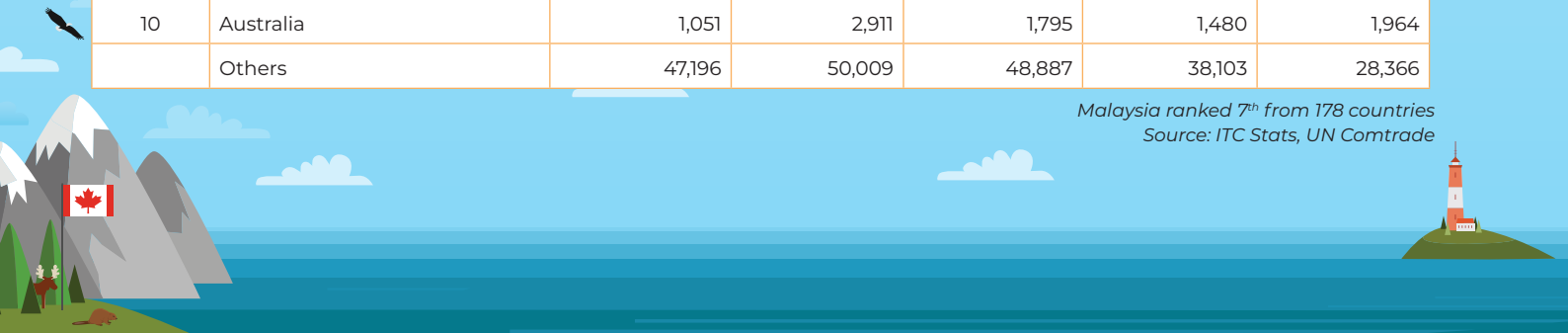
Canada exported a total of USD 3.12 billion worth of furniture (HS Code 9403) globally in 2024. The largest market was the United States of America at USD 3.06 billion, followed by the United Kingdom at USD 6.45 million, the Cayman Islands at USD 5.04 million, Colombia at USD 4.84 million, and Bermuda at USD 3.77 million, together representing the main destinations for Canadian furniture exports. Malaysia ranked 7th among 178 countries, with exports valued at USD 2.28 million in 2024 from USD 702 million in 2020, reflecting its growing position as one of the top buyers for Canadian furniture products.

Canada: EXPORT OF FURNITURE (HS CODE 9403) BY COUNTRY, 2020-2024

USD '000

RANK	COUNTRIES	2020	2021	2022	2023	2024
	World	2,366,956	2,705,830	3,237,531	3,218,251	3,122,034
1	United States of America	2,304,629	2,630,647	3,156,790	3,155,236	3,062,461
2	United Kingdom	5,927	7,006	7,470	7,324	6,451
3	Cayman Islands	940	1,021	1,418	3,216	5,044
4	Colombia	1,730	5,909	9,620	2,874	4,844
5	Bermuda	2,676	2,320	2,459	3,327	3,770
6	Mexico	1,846	2,043	2,539	2,747	2,830
7	Malaysia	702	948	1,634	1,696	2,280
8	Guatemala	153	957	2,650	715	2,029
9	Peru	98	2,056	2,269	1,539	1,999
10	Australia	1,051	2,911	1,795	1,480	1,964
	Others	47,196	50,009	48,887	38,103	28,366

Malaysia ranked 7th from 178 countries
Source: ITC Stats, UN Comtrade



Additionally, Canada exported a total of USD 1.47 billion worth of seats and parts thereof globally in 2024. The top five destinations were the United States of America at USD 1.41 billion, Mexico at USD 18.81 million, Japan at USD 8.40 million, China at USD 6.42 million, and Switzerland at USD 2.85 million, accounting for the majority of buyers of Canadian exports in this category. Malaysia ranked 24th among 152 countries, with intake valued at USD 0.40 million, reflecting its modest but consistent participation in Canada's global trade of seats and related components.

Canada: EXPORT OF FURNITURE (HS CODE 9401) BY COUNTRY, 2020-2024

USD '000

RANK	COUNTRIES	2020	2021	2022	2023	2024
	World	1,400,975	1,550,056	1,736,100	1,606,642	1,473,581
1	United States of America	1,338,941	1,481,263	1,662,409	1,534,715	1,411,371
2	Mexico	18,757	21,699	24,939	25,871	18,811
3	Japan	6,495	4,900	5,818	6,290	8,397
4	China	4,368	7,400	7,224	5,761	6,418
5	Switzerland	43	1,416	1,175	2,949	2,850
6	United Kingdom	4,961	3,844	3,817	3,619	2,294
7	Sweden	1,371	1,914	3,445	1,579	1,749
8	Finland	1,519	2,354	2,756	1,839	1,563
9	France	1,607	1,059	1,256	1,438	1,519
10	Germany	1,827	2,098	1,939	1,972	1,510
24	Malaysia	427	210	485	287	397
	Others	20,658	21,902	20,836	20,313	16,701

Malaysia ranked 24th from 152 countries
Source: ITC Stats, UN Comtrade

For import, Canada recorded a total of USD 9.87 billion worth of timber and timber products from the world in 2024, showing a slight decline from USD 10.14 billion in 2023. The largest import categories were seat and parts thereof at USD 3.35 billion and wooden furniture at USD 3.10 billion, reflecting Canada's continued demand for finished and semi-finished wood products. Builders' joinery and carpentry contributed USD 598 million, while sawntimber, plywood, fibreboard, logs, chipboard/particleboard, veneer, mouldings, and other wood products collectively accounted for the remainder. This highlights Canada's diverse sourcing of timber materials to meet both industrial and consumer needs.

Canada: IMPORT OF TIMBER & TIMBER PRODUCTS, 2020-2024

USD '000

Products	2020	2021	2022	2023	2024
Seat and parts thereof	2,876,136	3,300,748	3,692,797	3,549,981	3,354,277
Wooden Furniture	2,795,650	3,480,697	3,762,201	3,161,757	3,098,852
Builders Joinery & Carpentry	372,609	565,345	657,809	565,224	597,724
Sawntimber	406,410	695,924	661,764	510,069	489,079
Plywood	369,836	625,729	595,107	420,549	461,018
Fibreboard	347,830	442,515	435,706	314,790	306,085
Logs	257,033	296,848	313,005	308,939	291,957
Chipboard/Particleboard	140,727	193,825	213,657	195,078	199,668
Veneer	117,800	153,133	183,798	189,381	175,179
Mouldings	140,481	205,329	195,774	147,274	137,208
Others	615,788	675,324	759,331	778,959	757,244
TOTAL	8,440,300	10,635,417	11,470,949	10,142,001	9,868,291

Source : ITC Stats, UN Comtrade



Malaysia's Timber Trade Performance with Canada

MALAYSIA'S EXPORT OF TIMBER AND TIMBER PRODUCTS TO CANADA

In 2024, Malaysia's exports of timber and timber products to Canada recorded a significant increase of 30% from 2023, reaching a total value of RM 479.14 million, up from RM 367.71 million in 2023. The growth was largely driven by strong demand for wooden furniture, which accounted for RM 425.13 million, representing the 89% share of Malaysian exports to Canada. Other major contributors included sawntimber at RM 13.73 million, fibreboard at RM 9.82 million, and plywood at RM 7.84 million.

Several other timber products also experienced notable exports to Canada in 2024. Mouldings reached RM 8.52 million, builders' joinery and carpentry products rose to RM 6.09 million, while veneer contributed RM 3.88 million from RM4.14 million, RM3.20 million, and RM4.04 million in 2023. Overall, the 2024 export performance reflected Malaysia's continued ability to supply a diversified range of timber products to meet Canadian demand, with wooden furniture remaining the dominant export segment. Canada was Malaysia's 9th largest export market for timber and timber products in 2024.

Malaysia: EXPORT OF TIMBER & TIMBER PRODUCTS TO CANADA, 2020-2024

Value: RM

Products	2020	2021	2022	2023	2024
Wooden Furniture	297,180,510	264,214,937	342,173,129	331,272,933	425,132,084
Sawntimber	10,507,060	6,829,739	14,373,266	9,965,152	13,730,312
Fibreboard	9,789,689	9,666,394	15,272,313	6,643,472	9,822,579
Mouldings	4,874,504	6,063,585	5,402,925	4,193,328	8,516,529
Plywood	7,269,838	12,916,032	9,692,378	3,376,530	7,835,249
Builders Joinery & Carpentry	727,675	1,816,184	2,158,383	3,206,176	6,092,916
Veneer	2,942,925	1,930,029	3,167,110	4,042,713	3,878,259
Chipboard/Particleboard	140,964	400,428	447,377	199,676	493,435
Other Products	1,588,435	2,465,555	2,782,436	4,808,585	3,635,876
TOTAL	335,021,600	306,302,883	395,469,317	367,708,565	479,137,239

Source: MTIB/DOSM

MALAYSIA'S IMPORT OF TIMBER AND TIMBER PRODUCTS FROM CANADA

In 2024, Malaysia imported a total of RM 68.42 million worth of timber and timber products from Canada, showing a slight decline of 8% from RM 74.19 million in 2023. Sawntimber contributed significantly, with imports worth RM 20.67 million, although this represented a decrease compared to previous years.

Other timber products imported from Canada included wooden furniture at RM 0.23 million, fibreboard at RM 0.09 million, veneer at RM 0.015 million, and builders' joinery and carpentry (BJC) at RM 0.001 million. Mouldings were recorded at RM 0.26 million, while plywood imports were negligible in 2024. In summary, the data indicated that Malaysia's imports from Canada remained concentrated in raw and semi-processed timber products, particularly those used as inputs for downstream processing and industrial applications.

Malaysia: IMPORT OF TIMBER & TIMBER PRODUCTS TO CANADA, 2020-2024

Value: RM

Products	2020	2021	2022	2023	2024
Sawntimber	23,854,146	35,278,933	45,112,765	38,523,228	20,674,205
Mouldings	438,840	0	0	524	258,399
Wooden Furniture	219,779	443,540	90,916	531,421	230,712
Fibreboard	0	0	0	42,630	91,455
Veneer	0	0	0	0	14,998
Builders Joinery & Carpentry	0	37,280	0	159,959	1,172
Plywood	0	0	708,412	588	0
Other Products	3,655,290	26,903,288	24,141,938	34,934,636	47,145,150
TOTAL	28,168,055	62,663,041	70,054,031	74,192,986	68,416,091

Source: MTIB/DOSM

🍁 Market Access to Canada Through The Free Trade Agreements

Canada is one of the founding members of the Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP), together with Malaysia and nine other countries, namely Australia, Brunei, Chile, Japan, Mexico, New Zealand, Peru, Singapore, and Vietnam. The agreement is widely regarded as a “gold standard” free trade agreement due to its broad market access commitments, high-quality rules, and comprehensive tariff elimination schedule. Canada formally joined the CPTPP on 30 December 2018, which has had a significant impact on trade in timber and timber products between Canada and Malaysia.

Under the CPTPP, import tariffs on a wide range of timber products, including logs, sawntimber, veneer, mouldings, chipboard and particleboard, fibreboard, plywood, wooden frames, builders' joinery and carpentry, and wooden furniture, are eliminated. This zero-tariff framework provides both countries with improved market access, reduced cost barriers, and greater competitiveness for their exporters, helping to facilitate more efficient trade flows and support growth in bilateral timber trade.

Prior to the CPTPP, Malaysia applied MFN tariffs on certain products; 20% on chipboard/particleboard and fibreboard, 30–35% on plywood, 20% on wooden frames, and 5–20% on builders' joinery and carpentry. Canada's MFN tariffs were generally lower; 0-3.5% for mouldings, 6% for wooden frames, 6-8% for BJC, and 0-8% for seats, 0-9.5% for wooden furniture while other products were at zero. Duty implementation of CPTPP removes these tariffs entirely for both parties, facilitating smoother trade flows, reducing costs for importers and exporters, and encouraging bilateral trade in value-added timber products. Beyond tariff reductions, CPTPP also strengthens trade relations, promotes investment, and allows businesses in both countries to diversify and expand into Asia-Pacific markets under transparent and predictable trade rules.

Canada: TARIFF DUTY

HS Code	Products	MFN (%)		Comprehensive and Progressive Agreement for Trans-Pacific Partnership (CPTPP) (2025) (%)	
		Malaysia	Canada	Malaysia: Tariff Elimination Schedule	Canada: Tariff Elimination Schedule
4403	Logs	0	0	0	0
4407	Sawntimber	0	0	0	0
4408	Veneer	0	0	0	0
4409	Mouldings	0	0 – 3.5	0	0
4410	Chipboard/Particleboard	20	0	0	0
4411	Fibreboard	20	0 - 6	0	0
4412	Plywood	30 – 35	0	0	0
4414	Wooden frames	20	6	0	0
4418	BJC	5 – 20	6 – 8	0	0
9401	Seat and parts thereof	0 – 30	0 – 8	0	0
9403	Wooden furniture	0	0 – 9.5	0	0

Source: WTO

In addition, CPTPP also includes Cooperation and Capacity Building (Chapter 21), specifically outlined in Article 21.1, which forms part of the agreement's obligations for member countries to facilitate and provide a formal framework for technical cooperation, capacity-building initiatives, and knowledge sharing among Parties. For the timber industry, this platform cooperation is relevant, as it enables member countries to collaborate on sustainable forest management practices, enhance compliance with technical regulations and standards, and strengthen skills and institutional capacity within the forestry and timber sectors. By facilitating initiative workshops, technical assistance programmes, and information exchange, it ensures that both government agencies and industry players, including small and medium-sized enterprises, can fully benefit from the trade and market opportunities created under CPTPP.

🍁 Outlook and Prospect

The Canadian construction industry is projected to grow steadily over the next several years, with overall output expected to increase by around 2.6 percent in 2025 and continue growing at an average annual rate of approximately 2.8 percent through 2029. Growth is supported by residential building activity as well as rising investment in non-residential construction, infrastructure, and public works, which collectively broaden demand for construction materials. At the same time, the market for timber-based construction, including engineered wood and mass timber products, is expected to expand rapidly. The use of wood in mid-rise and tall buildings, modular housing, and low-carbon construction is forecast to grow strongly, reflecting both environmental preferences and government incentives for sustainable materials. This combination of overall construction growth and increasing adoption of timber products indicates strong opportunities for value-added wood and engineered wood materials in Canada over the coming decade.



Source: Woodworking Network



According to the RBC Climate Action Institute, Canada's timber industry is undergoing a structural transformation. The traditional softwood lumber sector, particularly in British Columbia, faces constraints due to reduced allowable annual cuts, wildfire risks, insect infestations, and Indigenous land settlements, which have collectively limited log supply and increased production costs. As a result, conventional sawmills in BC are under pressure, and output is expected to remain constrained in the near term. In contrast, provinces such as Nova Scotia and Quebec are being developed as growth hubs for value-added wood products and mass timber, supported by federal investments in modern manufacturing facilities, low-carbon building materials, and sustainable forestry practices.



Source: Canadian Wood portal

Government policies are playing a key role in shaping the industry's future. Federal initiatives include loan guarantees for timber companies, programmes supporting industrial modernisation, and incentives for producing engineered wood and mass timber products. Policies such as "Buy Canadian" for federal construction projects and export diversification strategies aim to stimulate domestic demand and open new international markets beyond the traditional reliance on the United States.

The outlook for Canada's timber industry shows a shift away from raw lumber toward engineered, value-added, and sustainable wood products, particularly mass timber and other construction-ready materials. While traditional softwood lumber faces challenges, the combination of regional restructuring, government support, and growing global demand for sustainable construction materials suggests significant growth potential for engineered timber and modern wood products over the next decade.

In addition, according to Mordor Intelligence, the Canadian home furniture market is expected to grow steadily over the coming years. The sector is estimated at around USD 8.7 billion in 2025 and is forecast to reach approximately USD

11.9 billion by 2030, driven by continued housing demand, urban population growth, and rising consumer preference for well-designed and durable household furnishings. This overall expansion supports increasing interest in wooden furniture, which remains a key category within the broader home furniture market.



Source: Birchwood Furniture Canada

Demand for wooden furniture in Canada is projected to strengthen further, supported by growing consumer emphasis on sustainability, certified wood materials, and modern multifunctional designs. Wooden furniture continues to perform well in both mid-range and premium segments, reflecting its appeal as a natural, long-lasting, and aesthetically valued material. These trends indicate continued opportunities for major suppliers, including Malaysia, whose wooden furniture products already have an established presence in the Canadian market.

Additionally, Canada's timber sector is increasingly leveraging artificial intelligence (AI) to enhance forest management, harvesting, and sustainability practices. AI technologies, including drones, satellite imaging, and machine-learning algorithms, are used to monitor forest health, assess growth patterns, and optimise extraction planning. These innovations support data-driven decision-making, enabling more efficient and sustainable forest operations while safeguarding biodiversity and natural resources.

In timber processing and manufacturing, AI is deployed to automate production lines, optimise machinery, and improve product quality. Advanced systems analyse sensor data to adjust cutting, grading, and finishing processes, reducing waste and enhancing throughput. Looking forward, autonomous drones, LiDAR-based mapping, predictive maintenance, and AI-driven analytics are expected to further improve efficiency and sustainability, positioning Canada's forestry sector as a global leader in smart and responsible timber production.

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- The International Tropical Timber Organization (ITTO)





Indonesia

Forest Product Exports Have Stagnated

The Ministry of Forestry has reported that forest product exports remain flat at around USD12 billion annually despite expectations of 3% yearly growth. Laksmi Wijayanti, Director General of Sustainable Forest Management, noted that the stagnation is influenced not only by production challenges but also by negative public narratives surrounding forestry policies.

Issues such as carbon, forest rehabilitation and international trade politics often dominate public attention affecting perceptions of the sector. She emphasised that Indonesia already has strong sustainability regulations including the Timber Legality and Sustainability Assurance Program (SVLK).

To stimulate growth the ministry is now focusing on downstream processing and increasing the value added of forest products. Current major exports include timber, pulp and paper but the government aims to shift from exporting mostly semi-processed materials to producing premium-quality goods.

Laksmi stated that efforts will expand beyond timber to promote non-timber forest products as well, ensuring that Indonesia's forest-based commodities can compete in higher-value international markets.

“In related news, it has been reported that the contribution of the forestry sector to national economic growth in 2025 experienced a noticeable decline compared to previous years. The Minister of Forestry, Raja Juli Antonnei, reported that the sector's contribution to GDP reached Rp97.22 trillion, down from Rp129.57 trillion in 2024 and Rp130.12 trillion in 2023. Data trends show steady growth from 2020 to 2023, followed by a significant drop in 2025, highlighting a slowdown in the sector's overall economic impact.”

Investment in the forestry sector also fell sharply with upstream forestry investment declining to Rp13.6 trillion in 2025 from Rp34.7 trillion in 2024 while downstream investment in industrialisation reached Rp36.6 trillion. Non-tax state revenue from forestry also decreased to Rp6.53 trillion from Rp8.12 trillion in 2024. However, the furniture industry, as a labour-intensive downstream sector, delivers significant added value to the national economy.

In the third quarter of 2025 the industry contributed 0.92% to the non-oil and gas GDP while the export performance remained slightly better than the previous year. The United States continues to be the main export destination accounting for more than half of Indonesia's furniture exports. The handicraft sector also showed solid growth, supported by the country's rich natural resources and creative craftsmanship.

Indonesia's furniture and craft industry, which employs more than 2.1 million workers and supports millions of SMEs, is facing growing pressure from global competition and increasingly strict international regulations. In response, the Indonesian Furniture and Craft Industry Association (HIMKI) has urged the government to strengthen industry protection, improve product traceability and reinforce the “Made in Indonesia” brand.

HIMKI Chairman Abdul Sobur highlighted the heavy compliance burden posed by measures such as the EUDR and called for differentiated requirements and stronger government support to ensure local businesses remain competitive.

To safeguard the sector, HIMKI recommends creating a national traceability and single-documentation system, offering financing and certification assistance and harmonising timber regulations to reduce bureaucratic overlap.

The Association is also pushing for preferential export tariffs, strict enforcement of anti-dumping measures and action against the influx of cheap imported products. Despite current challenges Sobur expressed confidence in the industry's future, citing Indonesia's unique cultural creativity as a lasting competitive advantage.

Source: www.itto.int, 15 December 2025



Viet Nam

Wood Product Exports Rise 12.5% in October 2025

According to the Viet Nam Customs Department, exports of wood and wood products (W&WP) reached USD 1.53 billion in October 2025, an increase of 12.5% compared with September 2025 but a slight decline of 0.9% against October 2024. Within this total, exports of wood products (WP) amounted to USD 1 billion, up 12% month-on-month but down 1% year-on-year.

In the first ten months of 2025, W&WP exports totalled USD14 billion, 6% higher than in the same period of 2024. WP exports reached USD9.6 billion, representing a 5% increase over the comparable period in 2024.

Exports of W&WP to the Netherlands in October 2025 were valued at USD 8.8 million, a decline of 23% compared with October 2024. However, shipments to this market over the first ten months of 2025 rose to USD 82.9 million, up 33% year-on-year.

Exports to Spain reached USD 4.8 million in October 2025, an increase of 5% compared with October 2024. Over the first ten months of 2025, exports to Spain totalled USD 60.1 million, up 25% over the same period in 2024.

“Viet Nam’s imports of W&WP in October 2025 stood at USD 248.4 million, down 6% compared with September 2025 but 6% higher than in October 2024. Over the first ten months of 2025, W&WP imports reached USD 2.62 billion, up 16% from the same period in 2024.”

Pine imports amounted to 89,900 cubic metres in October 2025, worth USD 16.4 million, down 7% in volume and 6% in value from September 2025. Compared with October 2024, pine imports decreased by 13% in volume and 31% in value. During the first ten months of 2025, pine imports reached 874,000 cubic metres, worth USD 172.3 million, up 6% in volume but down 7% in value year-on-year.

In the first nine months of 2025, wood imports from Cameroon reached 309,090 cubic metres, valued at USD 121.33 million, an increase of 10% in volume and 3% in value compared with the same period in 2024.

Source: www.fordaq.com, 2 December 2025



India

Trees Outside Forests Provide 85% of Industrial Wood Demand

Timber production from government managed forests has steadily declined from 10 million cubic metres in the 1970s to 4 million in the 1990s, 3 million in 2017, 1.75 million in 2019 and 1.56 million in 2020. It is against this backdrop that the significance of Trees Outside Forests (TOF) has grown.

TOF are found in diverse formations in the rural and urban landscapes from small woodlots, block plantations, strip plantations, along roads, canals and bunds and scattered trees on farmlands, homesteads and community lands.

TOFs play a significant role in the livelihood of people in the country both economically and environmentally. They make critical contributions to sustainable agriculture, food security and diversification of household economies. The Forest Survey of India (FSI) has broadly divided TOF into two categories.

TOF (Rural) and TOF (Urban). Block plantations of one hectare or more are categorised as under forest cover, while block plantations of less than one hectare and scattered trees are counted as tree cover. According to the India State Forest Report (ISFR) 2023 the total extent of area under TOF in India is estimated at 30.7 million hectares of which 12.8 million hectares are under agroforestry constituting about 42% of the TOF.

According to ISFR-2023, between 2013 and 2023 the area under TOF in India increased by 3.7 million hectares, a 14% rise, while agroforestry alone expanded by 2.1 million hectares marking a 20% increase. The overall increase in TOF area has been significant in Maharashtra, Karnataka and Odisha.

In Gujarat the decline of 120,000 hectares of TOF area during this period is a matter of concern. ISFRs have been consistently reporting the potential industrial wood production from TOF in their biennial assessments. These reports show a steady upward trend from 69 million cubic metres in 2011 to 91.5 million cubic metres in 2023. This marks an increase of 22.5 million cubic metres and accounts for approximately 85% of India's industrial wood demand.

Interestingly, the Western and Southern regions show comparable wood production levels despite the Southern region having significantly larger TOF area. This disparity may be explained by this region's focus on tree conservation a higher proportion of urbanised areas, prevalence of longer rotation crops, harsher climatic conditions and relatively lower soil fertility.

According to ISFR 2023 the top three states in terms of industrial wood production from TOF are Maharashtra, Uttar Pradesh and Madhya Pradesh. Agroforestry is primarily practiced for commercial purposes and thus constitutes the major source of industrial wood.

“However, due to small landholding sizes most farmers grow only small-diameter timber. Consequently medium and larger diameter timber is often imported to meet domestic requirements. India remains a net importer of wood and wood-based products with imports valued at around USD9 billion. To promote TOF the Ministry of Environment, Forest and Climate Change (MoEFCC) along with various State Forest Departments (SFD) has undertaken several initiatives.”

State Forest Departments have implemented various plantation schemes on Panchayat/Community land and farmland across the country. The private sector has contributed by promoting commercial tree crops to meet their raw material needs.

A key component of vision “Viksit Bharat @2047” involves doubling wood production by enhancing the productivity of commercial tree crops and expanding the area under TOF as this will support the growth of wood based industries and help meet the country's increasing demand for timber and wood products.

Source: www.itto.int, 15 December 2025



China

Rise in Plywood Exports in January–September Shipments

China's plywood exports increased in the first nine months of 2025, supported by expanding global demand and improved logistics along Belt and Road routes. According to China Customs, plywood exports totalled 9.922 million cubic metres from January to September 2025, up 4% compared with the same period in 2024.

“China's plywood industry continues to widen its international presence, with exports regularly reaching more than 200 destinations. Improved transport links, including the Belt and Road Initiative and the China–Europe Railway Express, have strengthened access to major and emerging markets along these corridors.”

The Philippines remained the largest export destination. Shipments to the country reached 786,000 cubic metres, an increase of 8% year-on-year. Exports to the UAE and Saudi Arabia, the second- and third-largest markets, rose 25% and 32% respectively.

Exports also increased to several other important destinations. Shipments to Nigeria rose 62%, while exports to Australia and Mexico grew 25% and 18% respectively.

In contrast, exports to some long-established markets declined. Shipments to the UK fell 3%, while exports to Vietnam and Japan each dropped 6% over the same period.

Source: www.fordaq.com, 4 December 2025



German

Furniture Exports Stabilize at €6.2 Billion Despite Tariff Pressures

German furniture exports totalled €6.2 billion in the first nine months of 2025, slipping only 0.7% compared with the same period last year. According to the Association of the German Furniture Industry, the sector is showing signs of stabilisation after several years of volatility, although ongoing tariff disputes continue to weigh on international trade flows.

Exports to key European partners showed mixed results. Shipments to Switzerland rose nearly 3%, while deliveries to Italy and Spain increased 9.4% and 8.7% respectively, supported by solid residential construction activity in both markets.

However, exports to France, Germany's largest furniture outlet, declined 2.1%, while sales to Austria fell 6.8%. Shipments decreased 0.7% to the Netherlands, 4.9% to the United Kingdom, and 2.1% to Belgium.

“Outside Europe, the United States remained Germany's most important overseas market, though exports fell by around 2%. The decline was most pronounced in the kitchen furniture segment, which contracted nearly 11%. Managing director Jan Kurth said U.S. import tariffs have pushed up retail prices and undermined the competitiveness of European manufacturers in the American market.”

Kurth also noted a shift in global supply chains: furniture originally destined for the United States is increasingly being redirected to Europe, especially Germany. Chinese and Vietnamese manufacturers have expanded shipments to Germany as US tariffs make direct access to the American market more costly.

Imports reflect this trend. Between January and September, German furniture imports from China rose 12.4% to €2.4 billion, while imports from Vietnam grew 17.4% to €197 million. China accounted for 30% of total German furniture imports, ahead of Poland with 29%. Imports from Italy rose 25.4%, and from Lithuania 28%.

Overall, German furniture imports increased 11% to approximately €8 billion, widening the sector's trade deficit and highlighting increased competitive pressure on domestic producers.

Source: www.fordaq.com, 1 December 2025



United Kingdom

Timber Imports Show Slight Improvement, but Volumes Remain Below Last Year

New timber import figures covering quarter three of 2025 reveal an ongoing mixed picture for the sector, with year-to-date volumes still trailing 2024 but showing some signs of improvement as the year progressed.

The latest statistics from Timber Development UK confirm that total imports in the first nine months of 2025 reached 7.01 million m³— around 2.1% below the 7.15 million m³ recorded in the same period of 2024. This gap has narrowed since the half-year point, when volumes were down by 2.9%.

This slight uplift has been driven by a need to replenish stocks following the surge in construction activity seen in quarter two. This resulted in a more positive third quarter for imports, with higher volumes than in quarter three 2024 across the softwood, hardwood, plywood, OSB and engineered wood product sectors. Overall imports for the quarter were only 0.2% lower than quarter three 2024, with a marked drop in MDF imports preventing combined volumes from moving into year-on-year growth.

For the year to date, solid wood imports from January to September were 2.5% lower than in the same time period in 2024, with panel products down by 1.3%. Weaker demand for softwood and a significant 25% fall in imported MDF remain the main factors holding back overall growth. By contrast, hardwood, particleboard and OSB imports have all edged ahead of 2024 levels, with hardwood plywood, softwood plywood and engineered wood products also delivering consistent gains throughout 2025.

The supply balance within softwood imports has also shifted. Despite a stronger September from Sweden, reduced volumes from the country accounted for more than the entire year-to-date deficit of 118,000 cubic metres. Germany and the Republic of Ireland also recorded declines of 9% and 14% respectively, lowering their shares of supply. These reductions were partly offset by increased volumes from Latvia and Finland, which rose by more than 60,000 m³ and 30,000 m³ respectively.

Softwood import values rose sharply in the nine months to September, increasing by 9% compared with 2024. Planned softwood values climbed 8%, and sawn goods

rose 11%. These increases were driven by a 12% rise in the average price of all softwood imports, despite overall softwood volumes falling by almost 3%. Pricing data indicates that softwood prices have risen over the past 12 months, diverging from the downward trends seen in sawn hardwood and plywood. Recent months, however, show signs of softwood prices beginning to soften again.

Hardwood imports remained largely unchanged year on year, growing by just 0.2% in total volume. The USA, Latvia and France all increased their supplies by 5%, 25% and 4% respectively, while Cameroon saw a 19% rise. Tropical hardwood volumes fell by 3%, despite significant increases from Cameroon and Malaysia, due to reductions from other key supplying countries. Temperate hardwood imports dropped by around 6%, with declines from Romania, the USA and Estonia offset only by France, which increased volumes by around 2,000 cubic metres.

The panel products sector showed a varied performance. Hardwood plywood imports rose by approximately 55,000 cubic metres, driven primarily by increased supply from China and Malaysia, which together provided 80% of the total. At present, it is difficult to determine whether this marked increase is due to increased consumption or Chinese hardwood plywood being diverted because of EU anti-dumping measures. Particleboard volumes increased by just over 1%, though changes in supply patterns were notable, with losses from Portugal and Belgium balanced by gains from China and Luxembourg.

In engineered products, Finland continued to dominate the UK Laminated Veneer Lumber (LVL) market, supplying 83% of volume. Although this share is slightly lower than in 2024, Finnish volumes still grew by around 14%.

“According to the latest NSD Softwood Import Forecast, import volumes will fall by around 3% in 2025 to approximately 5.62 million cubic metres before growing by 3.7% in 2026 to around 5.83 million cubic metres Demand remains weak, but this forecast growth would place import volumes slightly higher than in any of the last five years, suggesting the market may finally have turned a corner, although there is still a long way to go.”

“The latest timber import figures for quarter one to three of 2025 do show a slight improvement, albeit from a very low base, with several product categories showing signs of uplift in the third quarter in particular,” says TDUK Head of Technical and Trade, Nick Boulton. “This is most likely restocking after the raised construction activity we saw at mid-year. That said, the market remains difficult and overall volumes remain behind last year’s levels. The slight improvement is welcome, but it underlines just how sensitive demand continues to be across the sector. We will need to see sustained stability in 2026 before confidence can fully return to the market.”

Source: www.timberindustrynews.com, 9 December 2025



European Union

Tropical Wood Imports Remain Subdued Despite Modest Third-Quarter Uptick

EU27 imports of tropical wood and wood furniture showed only a marginal improvement in the third quarter of 2025, highlighting continued weak demand across the sector. Total imports reached 1,171,600 tonnes in the first nine months of the year, up 8% compared with the exceptionally low levels recorded in 2024.

Third-quarter arrivals amounted to 400,800 tonnes, just 1% higher than the second quarter and 12% above the same period in 2024. Despite the year-on-year increase, volumes remained well below the long-term quarterly average of roughly 450,000 tonnes, a benchmark established during the last decade. The data indicate that while the EU tropical timber trade has stabilised, a sustained recovery has yet to materialise.

“In value terms, EU27 imports of tropical wood and wood furniture reached USD2.47 billion in the first nine months of 2025, also 8% higher than the same period in 2024. Third-quarter import value totalled USD811 million, down 5% from the previous quarter but 6% higher than in the third quarter of 2024.”

Measured in nominal US dollars — without adjusting for inflation — the value of third-quarter imports remained above the pre-pandemic 2013–2019 quarterly average of around USD750 million. This suggests that while volumes remain depressed, higher prices and changing product mix are helping keep import values elevated relative to historical norms.

Overall, the EU market continues to show a slow and uneven recovery, with buyers exercising caution amid persistent economic uncertainty, shifting logistics costs, and ongoing adjustments within global supply chains.

Source: www.fordaq.com, 2 December 2025



Brazil

Forest Concessions an Instrument for Restoration, Conservation and Carbon

During COP30 in Belém the Brazilian Forest Service (SFB) moderated the Panel “Forest Concessions: Conservation, Restoration and Carbon” and highlighted the strategic role of forest concessions as public policy instruments that can combine conservation, ecological restoration, carbon credit generation and socioeconomic development.

The discussion brought together representatives from Petrobras, the Brazil NBS Alliance, the National Bank for Economic and Social Development (BNDES) and Mombak, which emphasised the need to align public policy, financial instruments and private initiatives to expand nature-based solutions (NBS) in the Amazon.

The SFB opened the session noting that the climate agenda goes beyond reducing deforestation and requires restoring degraded areas and reorganising the use of public forests with legal security and socio-environmental safeguards.

In this context, the concept of a ‘new generation’ of forest concessions focused on restoration and carbon was presented and illustrated by the Bom Futuro National Forest Concession located in the Amazon.

This is the first federal model dedicated to restoring degraded areas through carbon credit-generated funds and commercial production.

“According to the SFB, this initiative raises the standard of forest concessions by combining large-scale restoration, carbon revenues and direct benefits for local communities and this reinforces Brazil’s contribution to global climate goals.”

The Panel consolidated the view that a forest concession structure and the sustainable use of public forests provide predictability for investors and promote biodiversity-based development connecting conservation, restoration and the low-carbon economy into an integrated agenda for a sustainable Amazon

Source: www.itto.int, 15 December 2025



Ghana

TUC Calls on Government to Absorb Part of The New Tariff Increases

The Trade Union Congress (TUC) has called on the government to absorb part of the recently announced Public Utilities Regulatory Commission (PURC) tariff increases. The Union's Vice Chairperson, Dr. Ken Tweneboa Kodua, made this statement following an emergency meeting of a TUC steering committee held to determine the next steps after the PURC press release on the tariff increases.

According to Dr. Kodua the TUC is advocating for a process that reviews the operational costs of the utility companies to determine which PURC variables and expenses should go to the state and which should legitimately fall to consumers.

The Vice Chairperson said this approach would bring some level of fairness to households and businesses that are already under economic pressure. He indicated that the consumer must have the ability to pay and emphasised that the Union's concerns relate to fairness and due process, not opposition to tariff adjustments when they are justified.

“Ghanaian workers recently secured a 9% wage increase from January 2026 but just last week the PURC announced a 15% rise in water charges and a 9% increase for electricity which the TUC anticipates would wipe out the wage gain.”

Meanwhile, the Food and Beverages Association of Ghana (FABAG) has also criticised the PURC tariff increases describing the changes as economically harmful, unjustified and a major blow to Ghana's economy. In past development, the Association of Ghana Industries (AGI) and the Ghana Union of Traders Association (GUTA) have jointly sounded the alarm, warning that PURC tariff increases could undermine the success of the government's flagship 24-hour economy policy.

The variables PURC considered during its quarterly reviews include inflation, the exchange rate, fuel costs and the energy mix.

According to the latest Ghana Statistical Service (GSS) Consumer Price Index (CPI) report Ghana's inflation rate dropped for the eleventh consecutive month, easing to 6.3% in November 2025 from 8.0% in October 2025.



Source: www.graphic.com.gh, 9 December 2025






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Zero-emission trade routes expand as China, India and Brazil step in

The global push to develop green shipping corridors gathered momentum in 2025, with 25 new zero-emission trade routes launched this year and major emerging economies stepping more firmly into the effort, according to the latest Annual Progress Report on Green Shipping Corridors from the Getting to Zero Coalition and the Global Maritime Forum.

The fourth edition of the report, *At a Crossroads*, lifts the worldwide tally to 84 active corridor initiatives—up from 59 a year ago—and shows a marked shift in activity toward China (+4), India (+4), Brazil (+2), Chile (+2), Ghana, and Kenya. The authors said these countries are positioning themselves early to capture the industrial and energy-market advantages tied to new zero-emission fuels and bunkering hubs.

The update landed just weeks after the International Maritime Organization pushed back adoption of its planned Net-Zero Framework until at least October next year, delaying a system intended to help close the cost gap between fossil fuels and cleaner alternatives. The report cautioned that the setback risks fuelling a “wait-and-see” attitude that could stall progress.

“The move of major countries like China, India and Brazil into green corridors is hugely promising,” said Jesse Fahnestock, director of decarbonisation at the Global Maritime Forum. “But these corridors aren’t just climate projects—they’re strategic economic infrastructure. Early movers stand to gain on energy, trade and technology.”

For the first time, four green corridor projects have now reached the “realisation” phase, where vessel construction, fuel production, or port infrastructure buildout is underway. Even so, many initiatives remain stuck at the feasibility stage, where high fuel costs and uncertain policy support continue to slow investment decisions.

Compared with last year’s report, the mix of shipping segments has changed little. The main exception is a jump in tanker activity, driven largely by the addition of six ammonia-carrier corridors. There has also been a notable

rise in initiatives listed as “to be determined,” reflecting the wave of newly announced corridors that have yet to finalise key details such as the vessel segment.

The report urged governments and industry to use the next 12 months to advance projects rather than wait for IMO clarity. It highlighted national programmes—including the EU’s Global Gateway, H2Global and Australia’s Hydrogen Headstart—as immediate tools that could move corridors into advanced stages and help secure first-mover status once the IMO finalises its policy.

“We have at least 12 months before the IMO’s Net-Zero Framework is adopted,” Fahnestock said. “That time can either be spent waiting, or used to build projects that create strategic advantages and position participants for future global rewards. Those who act now will be best placed when regulation catches up.”

To maintain momentum, the report recommended that corridor partners push ahead with efforts to shrink the fuel cost gap, ensure readiness for future IMO incentives, engage more actively with cargo owners willing to pay a premium for cleaner transport, and lean on national policy to accelerate early deployments.

Since the concept emerged with the Clydebank Declaration at COP26 in 2021, green corridors have been seen as a proving ground for new fuels and technologies that could set the pace for wider decarbonisation across shipping. The authors noted that their impact extends beyond hardware and investments—many of the biggest shifts are happening behind the scenes through collaboration between ports, shipowners, fuel suppliers and regulators. With the industry approaching key 2030 climate milestones, the report highlighted the next few years will determine whether green corridors transition from pilots to a scaled global network capable of shifting the sector onto a net-zero track.

Splash247_27 November 2025



Shanghai port container volume up 6.5%



Container throughput at Shanghai Port has not experienced significant fluctuations and is maintaining an overall upward trend in 2025.

Container throughput at Shanghai port exceeded 46 million teu in the first ten months, a year-on-year increase of 6.5%. Among them, the container throughput at Yangshan port reached 23.84 million teu, up 8.9%.

Export volume for what described as the “new three” items in the shipping sector: electric vehicles, lithium batteries, and solar cells, continued to rise.

New energy vehicles played a key role in the port's container throughput growth, indicating the increasingly strong market competitiveness of the new energy vehicle sector in Shanghai and across China.

To date, Shanghai Nangang port's automobile throughput exceeded 1.01 million units of vehicle, a figure that has already surpassed Nangang port's total automobile throughput for the previous year.

Last year, Shanghai Port became the world's first port with an annual container throughput exceeding 50 million teu.

(SeatradeMaritime_27 November 2025)



Singapore overtakes HK as 4th largest ship registry



An influx of tonnage to the Singapore Registry of Ships (SRS) from owners trying to avoid geopolitical uncertainties has propelled the Lion City to become the world's fourth largest flag.

October saw another strong month of growth for the SRS with an additional 7.12 million gt, from 114 vessels, brought onto the registry. The total tonnage under the Singapore-flag increased to 134.89 million gt, according to preliminary estimates by the Maritime & Port Authority of Singapore (MPA).

By contrast the Hong Kong Ship Registry has been contracting and according to figures from the Hong Kong Marine Department it saw a decline of 6.39 million gt in September to 120.58 million gt for 2,162 ships.

As a result, the Singapore-flag has moved up the global rankings to fourth in terms of size as it surpasses the Hong Kong registry.

Growth of the Singapore flag has surged in recent months as owners reflagged ships from away from Hong Kong ahead of the USTR section 301 port fee for Chinese owned and operated vessels, which included those under the Hong Kong-flag, calling at US ports.

While the US fees, and China reciprocal special port fees on US linked ships, were suspended for a year on 10 November for a year, large numbers of vessels had already been transferred to the Singapore-flag.

Ahead of the USTR fees coming into force the world's largest container ship tonnage provider started moving reported fleet of around 100 vessels from the Hong Kong to Singapore registries, it also planned to shift its head office to Singapore.

In mid-October Hong Kong-headquartered Pacific Basin announced it would reflag around half its fleet of dry bulk ships to Singapore from Hong Kong to avoid USTR section 301 charges and shift its headquarters to the Lion City. Earlier this month Pacific Basin indicated to *Seatrade Maritime News* that these plans remained unchanged despite the suspension of the USTR charges for 12 months.

(SeatradeMaritime_27 November 2025)



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Shipments of Timber and Timber Products Through Ports in Peninsular Malaysia, NOVEMBER 2025

Products	Port Klang		Kuantan		Pasir Gudang		Tanjung Pelepas		Penang		Total all ports (m³)	% change October 2025/ November 2025
	m³	% Change	m³	% Change	m³	% Change	m³	% Change	m³	% Change		
Sawntimber	31,174	-19	1,629	515	859	8	446	-35	3,293	-50	37,402	-20
MDF	8,087	20	0	0	489	-45	1,493	-9	24	-87	10,093	7
Mouldings	16,459	19	5	8	1,357	-8	1,784	14	127	-47	19,733	16
Plywood	4,600	42	0	0	158	-10	506	-4	15,198	-19	20,462	-10
Veneer	490	-16	0	0	43	-36	0	0	635	131	490	-16
Particleboard	7,252	-23	0	0	61	325	0	0	277	-96	7,589	-53
Total	68,062	-6	1,634	506	2,968	-13	4,229	-4	19,555	-41	96,448	-15

LOGS

The timber price in November 2025 for heavy hardwoods remained the same as the previous month. Chengal recorded the price at RM3,220/tonne, Balau at RM3,710/tonne, Red Balau at RM2,123/tonne and Merbau at RM2,850/tonne. For medium hardwood, Keruing, Kempas, Kapur, Mengkulang and Tualang were priced at RM1,930/tonne, RM1,554/tonne, RM1,840/tonne and RM1,383/tonne respectively. For light hardwood, Dark Red Meranti was priced at RM1,600/tonne, Red Meranti at RM1,877/tonne, Yellow Meranti at RM1,610/tonne and Nyatoh at RM1,355/tonne. As for rubberwood, the price remained at RM190/tonne as compared to last month.

PLYWOOD

In November 2025, the Plywood price segment remained the same compared to last month. The prices for 6mm sheets were RM26.00/sheet, the 9mm sheets were RM38.00/sheet and the 12mm sheets were RM48.50/sheet.

MEDIUM DENSITY FIBREBOARD (MDF)

In November 2025, the MDF price segment remained the same compared to last month. The prices for boards of 4mm thickness were RM12.90/piece, 6mm thickness were RM23.95/piece, 9mm thickness RM31.70/piece and 12mm thickness were RM37.80/piece.

SAWNTIMBER

As of November 2025, the price for Chengal sawntimber remained at RM5,473/m³ in the General Market Specification (GMS) grade, while the price for scantlings and strips remained at RM6,356/m³ and RM2,754/m³ respectively. This was followed by Balau with its GMS grade price remaining at RM3,043/m³ while scantlings remained at RM4,590/m³. As for medium hardwood, timber species such as Keruing were priced at RM3,119/m³ for GMS, scantling (RM2,459/m³) and strips (RM2,260/m³). Meanwhile, for Kempas the price for GMS was RM2,166/m³, scantlings were RM2,366/m³ and strips RM1,783/m³. The price of rubberwood sawntimber in November 2025 amounted to RM1,210/m³ for 1"x1", RM1,300/m³ for 2"x2", RM1,380/m³ for 3"x3" and RM1,430/m³ for 4"x4" pieces.

TRADE IN MALAYSIA - NOVEMBER 2025

In November 2025, commerce between Sabah and Sarawak with Peninsular Malaysia totalled at 2,632 m³, with a value of RM4.83 million. Sabah remained the top contributor to the trade value for Peninsular, recording a trade value of RM2.97 million (1,399 m³) for Plywood, followed by sawntimber (RM0.64million) and Veneer (RM0.49 million). Meanwhile for Sarawak, the trade value for Plywood was RM0.54 million while sawntimber was RM0.17 million. 



AVERAGE DOMESTIC PRICES OF LOGS, SAWN TIMBER, PLYWOOD AND MDF IN PENINSULAR MALAYSIA*RINGGIT MALAYSIA****NOVEMBER 2025**

SPECIES	LOGS/ton	SAWN TIMBER/m³			
	18" UP	GMS	STRIPS		SCANTLINGS
HEAVY HARDWOOD					
Chengal	3,220	5,473	2,754		6,356
Balau	3,710	3,043	1,854		4,590
Red Balau	2,123	2,737	2,101		2,419
Merbau	2,850	3,743	3,225		3,725
Mixed Heavy Hardwood	1,112	1,326	1,084		1,243
MEDIUM HARDWOOD					
Keruing	1,930	3,119	2,260		2,495
Kempas	1,554	2,166	1,783		2,366
Kapur	1,840	1,746	1,271		1,685
Mengkulang	1,756	1,192	1,306		1,871
Tualang	1,383	1,907	1,518		1,730
LIGHT HARDWOOD					
Dark Red Meranti	1,600	2,083	1,942		3,337
Red Meranti	1,877	1,754	2,013		2,542
Yellow Meranti	1,610	1,593	1,365		1,801
White Meranti	1,683	2,024	1,801		1,607
Mersawa	1,425	1,977	1,330		2,154
Nyatoh	1,355	1,774	1,807		1,201
Sepetir	1,177	1,801	1,601		1,283
Jelutong	1,215	2,119	1,571		1,819
Mixed Light Hardwood	1,223	1,266	1,083		1,112
MALAYSIAN RUBBERWOOD Hevea brasiliensis	LOGS/ton	SAWN TIMBER/m³			
		1" x 1"	2" x 2"	3" x 3"	4" x 4"
	190	1,210	1,300	1,380	1,430
PLYWOOD 4' x 8' (RM per piece)	4mm	6mm	9mm		12mm
	19.50	26.00	38.00		48.50
MDF 4' x 8' (RM per piece)	4mm	6mm	9mm		12mm
	12.90	23.95	31.70		37.80

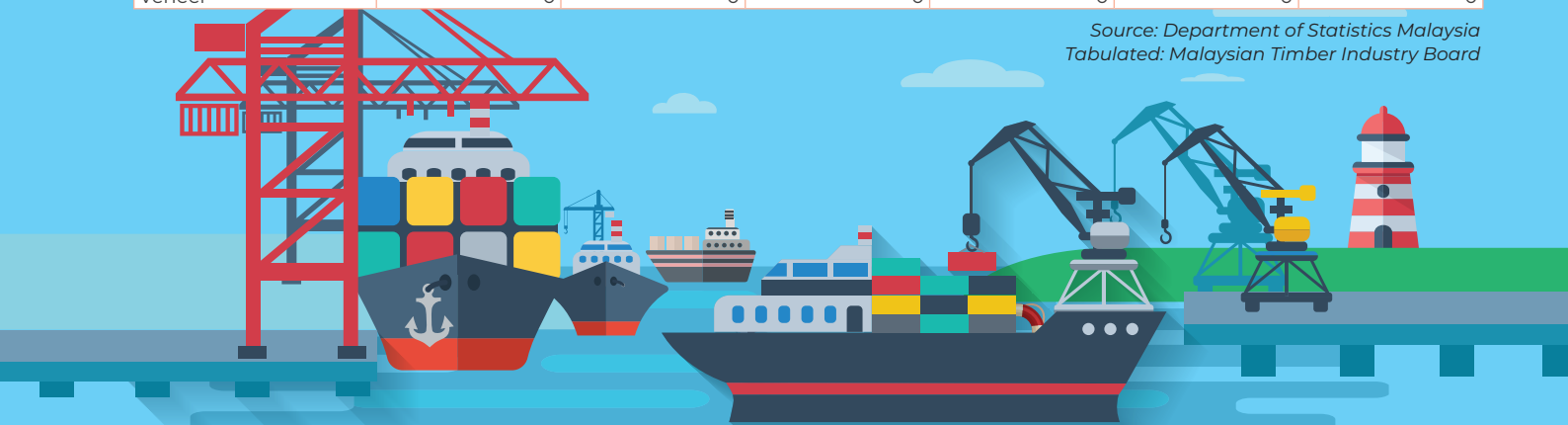
Note: Log prices ex-matau. Sawn timber, plywood, MDF and Malaysian Rubberwood (Hevea brasiliensis) prices ex-mill

* Prices are only indicative

INTRA-MALAYSIA TRADE

	OCTOBER 2025		NOVEMBER 2025		% change in volume	% change in value
	Vol(m ³)	Val(' 000 RM)	Vol(m ³)	Val(' 000 RM)	OCT/NOV	OCT/NOV
Sabah						
Logs	4,909	1,028	0	0	-100	-100
Sawn Timber	361	549	340	645	-6	17
Plywood	1,419	3,332	1,399	2,972	-1	-11
Veneer	132	218	200	498	52	128
Sarawak						
Logs	0	0	0	0	0	0
Sawn Timber	228	198	136	174	-40	-12
Plywood	518	449	557	543	8	21
Veneer	0	0	0	0	0	0

Source: Department of Statistics Malaysia
Tabulated: Malaysian Timber Industry Board





Dedali

Strombosia javanica

Prepared by: Puan Noridah Tahir

Dedali is the standard Malaysian name for the timber of *Strombosia javanica* in Peninsular Malaysia, Sabah and Sarawak. Other vernacular names applied include *bayam badak* (Kedah and Perak) *belian landak* (Sarawak), *bayam* and *dedali badak* (Peninsular Malaysia).

“ *Strombosia javanica* is a mono-specific timber meaning the timber is primarily identified and marketed solely by its species name. It is typically not grouped with other, less common or unrelated species under a generic timber group name. ”

The genus *Strombosia* consists of about 11 species which are found in the tropics of Africa and Asia. Five different species from this genus have been recorded (according to the Malaysia Biodiversity Information System). The *Strombosia* species that are native and notably present in Malaysia are *S. ceylanica*, *S. javanica*, *S. multiflora*, *S. philippinensis* and *S. rotundifolia*.

Taxonomy

The genus *Strombosia* belongs to the family Strombosiaceae. Previously, *Strombosia* was categorised under the Olacaceae family but recent molecular studies show that it is better placed in a separate family Strombosiaceae. This also includes five other genus; *Diogoa*, *Engomegoma*, *Scorodocarpus*, *Strombosiopsis*, *Tetrastylidium*.

Botanical description

Dedali is a medium-sized tree reaching up to 24 m tall and 90 cm girth. The crown is monopodial or ultimately sympodial. The spirally arranged leaves are stalked and have leaf blades that range from membranous to almost leathery. These blades are elliptic-oblong measuring 10–24 by 4–8 cm, and without translucent dots. The distal parts of the leaf stalks are also slightly swollen. The long-stalked flowers have greenish-white petals and are borne singly or in 3 to 7 flowered, branched clusters from the leaf axils. The tree usually flowers at irregular intervals, and the flowers are insect-pollinated.



Anatomical description

Growth rings are absent while vessels are numerous, very small and difficult to discern even with a hand lens with multiple perforation plates present but not visible with a hand lens. Vessels are solitary and in radial multiples of 2-6. Tyloses are absent but the presence of numerous and closely spaced diffuse parenchyma strands tend to give the impression of vessels filled with tyloses. Deposits are also absent while wood parenchyma is abundant, mainly as apotracheal diffuse strands and incomplete layers linking ray to ray. Rays are very fine and numerous, not visible with the naked eye and not conspicuous on the radial surface while ripple mark and intercellular canals are absent.

Physical properties

The tree is light hardwood with a density of 576-720 kg/m³ and an average density of 640kg/m³ air dry. Its sapwood is lighter in colour and well-defined from the heartwood which is pale yellow to golden yellow when fresh but darkening on exposure to light orange brown. The texture is fine and even while the grain is straight to interlocked. Its wood is moderately soft and moderately light and it's categorised in strength group 4 (moderately strong).

Workability

The timber is easy to resaw and crosscut while planning is easy and the planned surface produce is smooth on the tangential side and slightly rough due to grain pick-up on the radial side. Its nailing property is rated as good. The wood seasons very slowly: boards 13 mm and 38 mm thick take respectively about 7 and 12 months to air dry.

Shrinkage is high, with radial and tangential shrinkage of 1.4% and 3.5% respectively. It dries very slowly with a moderate amount of cupping, twisting, end-checking and surface checking as the main sources of degrade. It is also very prone to insect attack during drying.

Uses

Suitable for general utility purposes, medium construction under cover, interior finishing, packing cases, flooring, door panel, wood bending, solid door construction, veneers and plywood.



Reference:

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<https://prota.prota4u.org/protav8.asp?g=pe&p=Strombosia%20scheffleri>

Photo of dedali's leaves and flowers – <https://www.nparks.gov.sg/florafaunaweb/flora/3/1/3148#:~:text=Local%20Conservation%20Status,are%20eaten%20raw%20or%20cooked.>

1-4 DECEMBER 2025

10th Asean Regional Workshop on Timber Legality Assurance and Traceability Programme

5-8 DECEMBER 2025

Retreat 2025 Achievements & MTIB Flagship Proposals 2026

9 DECEMBER 2025

Courtesy Visit from Setiausaha Bahagian Kanan (SUBK), Bahagian Kemajuan Industri Kayu-Kayan, Tembakau dan Kenaf (KTK), Kementerian Perlindungan dan Komoditi (KPK)

10-11 DECEMBER 2025

Hari Profesi Teknikal Negara (HPTN)

13 DECEMBER 2025

Program Santuni Madani Kementerian Perlindungan Komoditi (KPK)