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Perspective from timber importers from China to Japan on responsible timber harvest & trading

中-日贸易链进口商视角下的负责任木材采伐与贸易

This presentation is based on data collected through an ongoing ITTO project, ANALYSIS OF TIMBER LEGALITY ASSURANCE SYSTEMS AND GOOD PRACTICES IN CHINA, MYANMAR, AND VIET NAM FOR SUSTAINABLE TIMBER TRADE (PP-A/56-342B).

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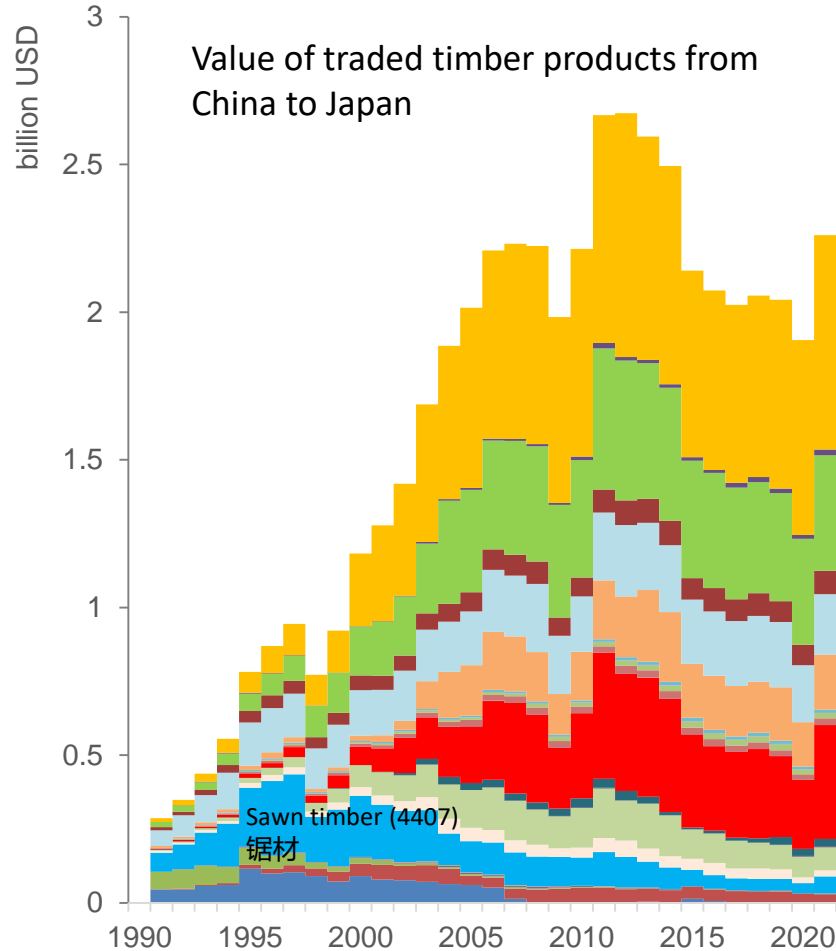
MAFF
Ministry of Agriculture,
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IGES
Institute for Global
Environmental Strategies

Who we are?

关于IGES

- IGES (Institute for Global Environmental Strategies) is a public interest incorporated foundation, established in 1998 by the Government of Japan. IGES（全球环境战略研究所）是一个由日本政府于1998年成立的公益性基金会。
- IGES is working on Climate Change, Sustainable Consumption and Production, and Ecosystem Conservation. IGES致力于气候变化、可持续消费和生产以及生态系统保护。
- Forest team of Biodiversity & Forest Area has worked on responsible timber trading and REDD+ (Reducing Emissions from Deforestation and forest Degradation), mainly supporting the Forestry Agency of Japan. IGES森林团队职责主要是负责任木材贸易和REDD+（减少毁林和森林退化的碳排放），支持日本林野厅的相关工作。
- We are currently working on an ITTO (The International Tropical Timber Organization) project, ANALYSIS OF TIMBER LEGALITY ASSURANCE SYSTEMS AND GOOD PRACTICES IN CHINA, MYANMAR, AND VIET NAM FOR SUSTAINABLE TIMBER TRADE, with support from CTWPDA. 在CTWPDA的支持下，我们目前正在执行ITTO（国际热带木材组织）的一个项目，即开展针对中国、缅甸和越南的木材合法性系统和最佳的分析，以促进可持续木材贸易。



Timber trade from China to Japan 中国对日本出口的木材与木制品

- The value shares about 10% of the total export of timber products from China
占中国对日出外出口木材与木制品总额的10%
- Plywood & LVL and Wooden furniture are the major exported products
以胶合板、LVL和木制家具为主

Source: UN Comtrade

Regulations on timber legality of timber importing countries

木材进口国的法规

- 2008 US amended Lacey Act
雷斯法案
- 2012 Australia Illegal Logging Prohibition Act
澳大利亚木材法规
- 2013 EU Timber Regulation
欧盟木材法案
- 2017 Korea enacted Act on the Sustainable Use of Timbers
韩国木材可持续利用法
- 2019 China amended Forestry Act
中国新森林法

2006

- Government of Japan revised **Green Procurement Act** to request timber industry provide legality certification for public purchase. 日本政府修订了绿色采购法，要求木材行业为公共采购提供合法性证明。
- Forestry and timber industry associations established the **Goho system** (verification to issue the legality certification). About 12,000 companies are verified as of 2022. 林业和木材工业协会建立了Goho系统（核查以颁发合法性证书）。截至2022年，约有12,000家公司得到了验证。


2016

- Government of Japan enacted **Clean Wood Act** to request all timber industry check legality of all timber products they procure. 日本政府颁布了《清洁木材法》，要求所有木材行业检查所采购的所有木材产品的合法性。

2021~

- Government of Japan reviewed the implementation of Clean Wood Act and is considering the revision. 日本政府审查了《清洁木材法》的执行情况，并正在考虑修订。

Progress in Japan

 **Timber importers in Japan have increased their efforts to obtain evidence of legal harvest.** 日本的木材进口商在获取验证木材合法性验证材料上不断努力。

Clean Wood Act 日本清洁木材法案

(The Act on Promotion of Use and Distribution of Legally-harvested Wood and Wood Products

关于促进使用和销售合法采伐的木材和木制品的法律)

Enacted in 2016 and enforced since 2017

2016年颁布，2017年起执行

- All wood-related business entities are requested to **check** all timber products they purchase about 要求所有与木材有关的企业实体检查其购买的所有木材产品，包括
 - Tree species 树种
 - Country of harvest 采伐国家
 - Legality of harvest in the harvested country 采伐国颁发的采伐许可
- A voluntary Registration System of wood-related business entities was established. The registered companies should report the **check results** on all purchases annually. 建立了一个与木材有关的商业实体的自愿性登记系统。注册公司应每年报告所有采购的检查结果。
 - About 600 companies have been registered, including all major timber importers in Japan. 约600家公司已经注册，包括日本所有主要的木材进口商。
- While the distribution of timber products whose legality is not verified after the check (“unconfirmed timber”) is still allowed, the way to reduce the volume is under discussion. 虽然仍然允许分销那些在检查后无法核实合法性的木材产品（“未经证实的木材”），但正在就这一部分数量的减少进行研讨。

Importers can get legal evidence easily from some countries.

进口商从一些地方获得合法性证明是相对容易的

US, Canada, EU, Australia
美国，加拿大，欧盟，澳大利亚

Most timbers are certified by FSC or PEFC which guarantees legal harvest. 大多数木材都通过了FSC或PEFC认证，保证了合法采伐。

Indonesia, Malaysia
印尼，马来西亚

The governments established Timber Legality Assurance Systems (TLAS) and issue their legal certification to all timber exported. 各国政府建立了木材合法性保证体系，并对所有出口的木材颁发其合法证书。

However, China is considered one of the most challenging countries to obtain evidence of legal harvest.

然而，中国被认为是获取供应链合法采伐证明最具挑战性的国家之一。



Questions

What are the challenges for Japanese timber importers from China to secure evidence of the legal harvest of timber products and their solutions?

日本进口中国木材的企业在获得合法采伐木材产品的证据及其解决方案方面面临哪些挑战？

Methods 研究方法

- Interview with 16 timber-related business companies in Japan directly / indirectly importing timber products from China. 访谈了日本直接/间接从中国进口木材产品的16家企业。

Business types: trading (timber, furniture) and construction 从业范围：贸易（木材，家具）和建筑

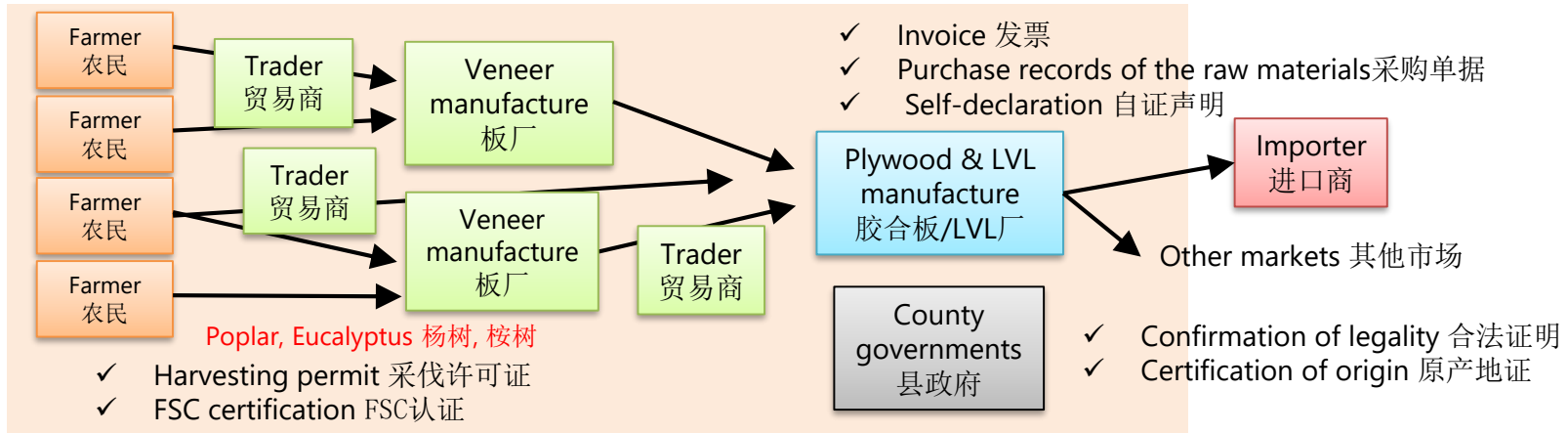
- August 2021 – March 2022 2021年8月-2022年3月
- Questions: Product types they purchased, tree species of the raw materials, and challenges to check the legality of harvest. 访谈内容：采购的产品，原料树种，在获取合法性证明文件上面临的挑战

Imported timber products from China and the tree species 从中国进口的木材产品与树种

Products 产品	Domestic species 国产树种	Imported from third countries 第三国进口的树种
Plywood 胶合板	Poplar, Eucalyptus 杨树、桉树	Larch, Linden (Russia), Bintangor (PNG) 落叶松, 椴木（俄罗斯）, 冰糖果（巴新）
Laminated Veneer Lumber (LVL)	Poplar, Eucalyptus 杨树、桉树	
Sawn timber 锯材	Paulownia, Ash, Oak, Birch, Chestnut 泡桐、白蜡、橡木、桦树、栗子	Walnut, Oak, Cherry (North America and EU), Ash, Linden (Russia), Ipe, Jatoba, Purpleheart (Brazil), Japanese cedar (Japan), 胡桃木、橡木、樱桃（北美和欧盟）、白蜡木、菩提树（俄罗斯）、蚁木、贾托巴、紫心木（巴西）、日本雪松（日本）。
Laminated wood 层积材		Radiata pine (Chile), Red pine (Russia) 辐射松（智利）, 红松（俄罗斯）
Furniture 家具	Poplar, Eucalyptus 杨树, 桉木	Beech (USA, EU), Oak, Birch (Russia), Pine (Chile), Ayous (Cameroon) 榉树（美国、欧盟）、橡木、桦树（俄罗斯）、松树（智利）、阿尤斯（喀麦隆）。

Plywood & LVL of domestic log (Poplar & Eucalyptus) 国产原木胶合板和LVL (杨树和桉树)

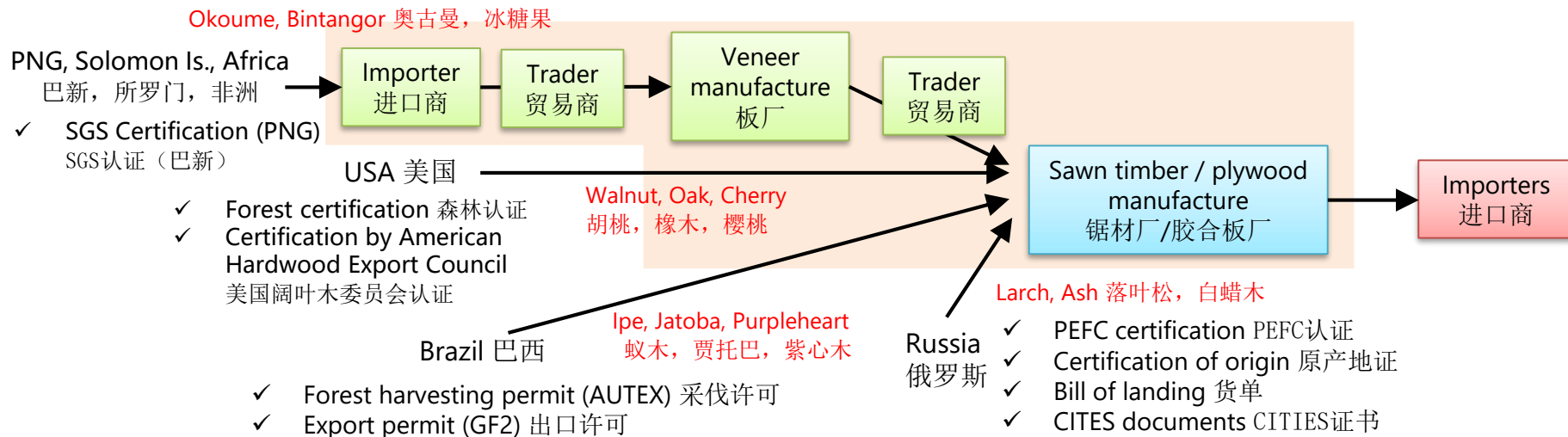
- The trees as the raw materials are planted mainly by numerous small-holders on their farms, and the legality risk is considered low. 作为原材料的树木主要是由众多小农户种植的，合法性风险被认为很低。
- However, collecting the harvesting permits of all the logs through the complex supply chain is challenging. 然而，通过复杂的供应链收集所有原木的采伐许可证是一个挑战。
- It is difficult for some importers to understand whether all timber from China should have a harvesting permit and the differences in rules among provinces and counties. 一些进口商很难理解是否所有来自中国的木材都应该有采伐许可证，以及各省市县之间的规则差异。
- Therefore, some importers handle the timber as “unconfirmed timber.” 因此，一些进口商将木材作为“未经确认的木材”处理。



- On the other hand, some importers have established collaborative partnerships with their suppliers (plywood & LVL manufacturers) with support from county governments and archived to collect legal documents of all the raw materials. 另一方面，一些进口商在县政府的支持下与他们的供应商（胶合板和LVL制造商）建立了合作关系，并归档收集所有原材料的法律文件。
- Their suppliers avoid purchasing veneer without harvesting permits. 供应商避免购买没有采伐许可证的木皮。

Sawn timber & plywood of imported log 以进口原木为原料制作的锯材和胶合板

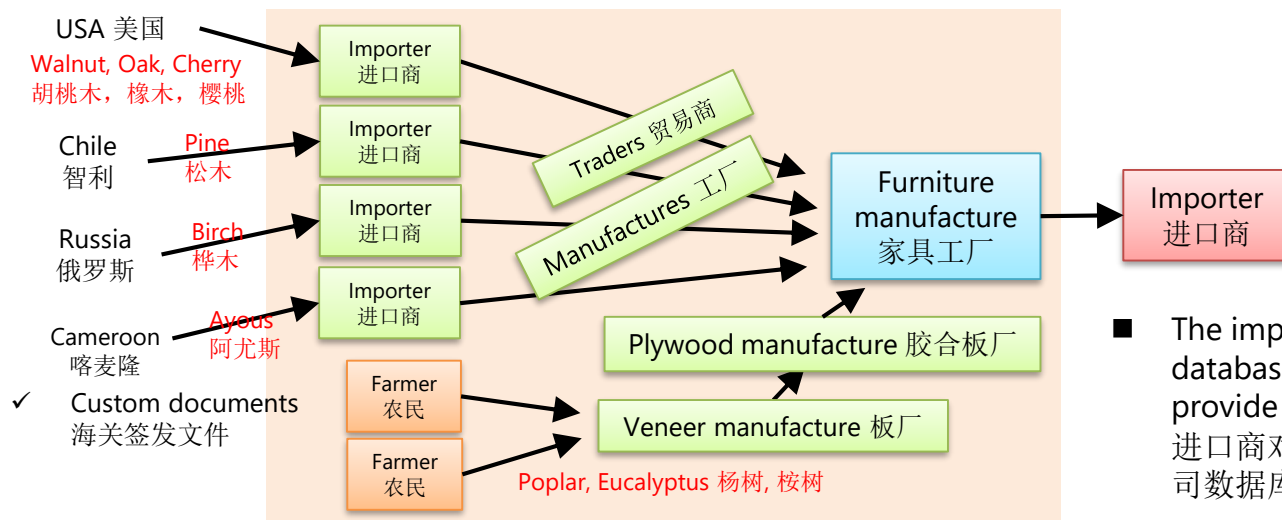
- Because of the long supply chain, some importers gave up on obtaining legal documents in the harvested countries. 由于供应链很长，一些进口商放弃了在原产国获得法律文件。



- However, some importers obtain legal documents in the harvested countries from their suppliers (sawn timber/plywood manufacturers). 一些进口商从其供应商（锯材/胶合板制造商）那里获得采伐国的法律文件。
- The importers have stopped importing from suppliers that cannot provide legal documents. 进口商已停止从不能提供法律文件的供应商处进口。

Wooden furniture 木制家具

- Importers are facing difficulty understanding the long and complex supply chain, but are trying to trace it back to the log origin (it took a few years). 进口商正面临着理解漫长而复杂的供应链的困难，但正试图追溯到原木产地（耗时数年）
- The direct suppliers were very collaborative, but it wasn't easy to gain cooperation from upstream companies as they also trade with other customers. 直接供应商非常配合，但要获得上游公司的合作并不容易，因为他们也与其他客户进行交易。
- Because it is not meaningful to check consistency between the input and output volume of the upstream companies. Instead, the importer focuses on checking the tree species (especially tropical species), the actual existence of the upstream companies and management, etc. 因为检查上游公司的投入和产出量的一致性是没有意义的。相反，进口商重点检查树种（特别是热带树种），上游公司的实际存在和管理等。



- The importers are interested to know a database of Chinese companies that can provide legal documents for their products. 进口商对可以为其产品提供法律文件的的中国公司数据库很感兴趣

Conclusion 结论

- Evidence of legal harvest is becoming necessary for all timber importers in Japan following the enactment of the Clean Wood Act in 2016. 2016年颁布《清洁木材法》后，合法采伐证明对日本所有木材进口商都是必要的。
- Because of the complex supply chain with numerous players and the absence of TLAS, securement of the evidence for timber imported from China is considered challenging in general by Japanese importers. 由于供应链复杂，参与者众多，而且没有TLAS，日本进口商普遍认为从中国进口木材合法性证明的获取具有挑战性。
- However, some Japanese importers established collaborative relationships with their suppliers in China, able to collect the evidence for all the timber products from domestic and/or imported logs. They are willing to strengthen the relationship with their trusting partners. 然而，部分日本进口商与他们在中国的供应商加强合作，为所有来自国内和/或进口原木的木材产品提供合法性文件。
- Collaboration between log-producing countries and China to archive responsible timber trading along the Belt and Road and the implementation of Section 65 of the amended Forest Act are expected to facilitate timber trade from China to Japan with legal evidence and strengthen the partnership. 通过原采伐国与中国的合作，在“一带一路”沿线建立负责任的木材贸易数据库，并践行新《森林法》第65条为下游企业提供合法证据，预计将促进从中国到日本的木材出口，加强伙伴关系。