



ITTO
INTERNATIONAL TROPICAL
TIMBER ORGANIZATION



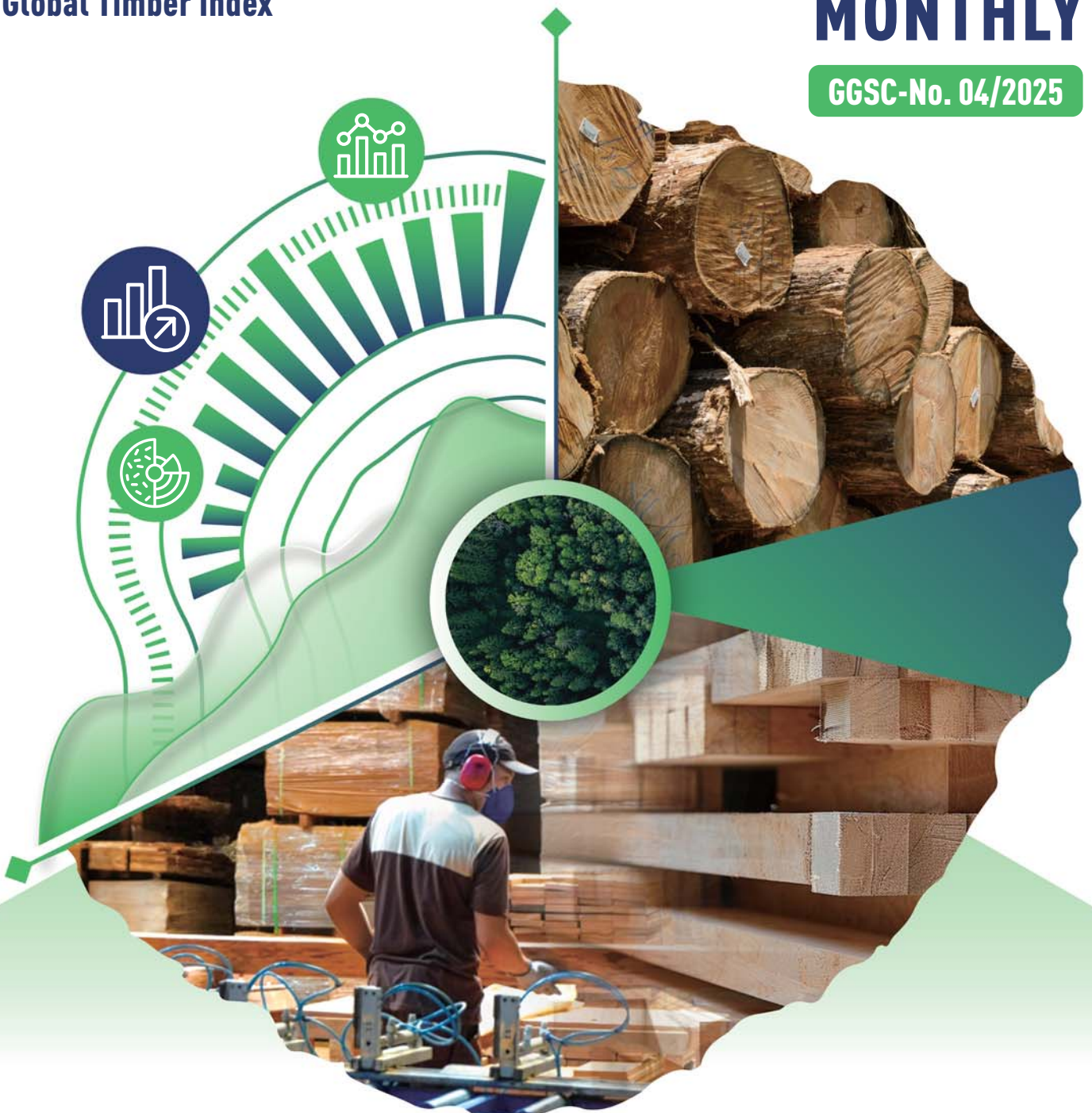
This report was prepared by GGSC, with support of ITTO and IPIM, and Focal Points of Indonesia, Malaysia, Thailand, Gabon, Republic of Congo, Ghana, Brazil, Mexico and China.

GTI REPORT 2025

Global Timber Index

MONTHLY

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Indonesia

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Malaysia

- Malaysian Timber Council (MTC)
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Gabon

- Ministry of Water and Forests, Responsible for the Climate Plan and Land Use

Republic of the Congo

- Ministry of Forest Economy

Ghana

- Forestry Commission



Thailand

- Thai Timber Association (TTA)

China

- The Secretariat of the Global Green Supply Chains Initiative (GGSC)



Mexico

- National Forestry Commission of Mexico (CONAFOR)

Brazil

- STCP Engenharia de Projetos Ltda



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GTI REPORT 2025

APRIL





Global Legal & Sustainable Timber Forum 2025

From Forest to Home

— An International Dialogue on Emerging Consumer Trends and Supply Chains Innovation

23-24 September 2025

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Organizer



Diamond Partner



Belém, Pará, Brazil

Verification of Transparency of Timber Origin (VTO)



The timber production chain in the Amazon is complex and multifaceted. To ensure responsible purchasing and prevent companies from acquiring timber that presents any inconsistency in its origin that could contaminate its supply chain, a supply chain verification program was established so that AIMEX member companies could have their purchases certified and verified. This protocol is called Verification of Transparency of Origin (VTO), which is an audit protocol based on investigating the legality of the practices of participants in the timber production chain. It is a risk management tool that aims to promote a responsible timber market and assist in the decision-making process in purchase recommendations.

The protocol works with three different types of audits, considering different levels of investigation, namely: documentary, geospatial and field analyses. The audit process considers various requirements established in environmental and labor laws, defined as verifiers. For each verifier, specific criteria are also set out, forming a checklist of evidence and information to be gathered and checked during the audit, such as licenses and authorizations, records of infractions and embargoes, geospatial analysis, analysis of indicators and production documents, and field validation of verifiers.

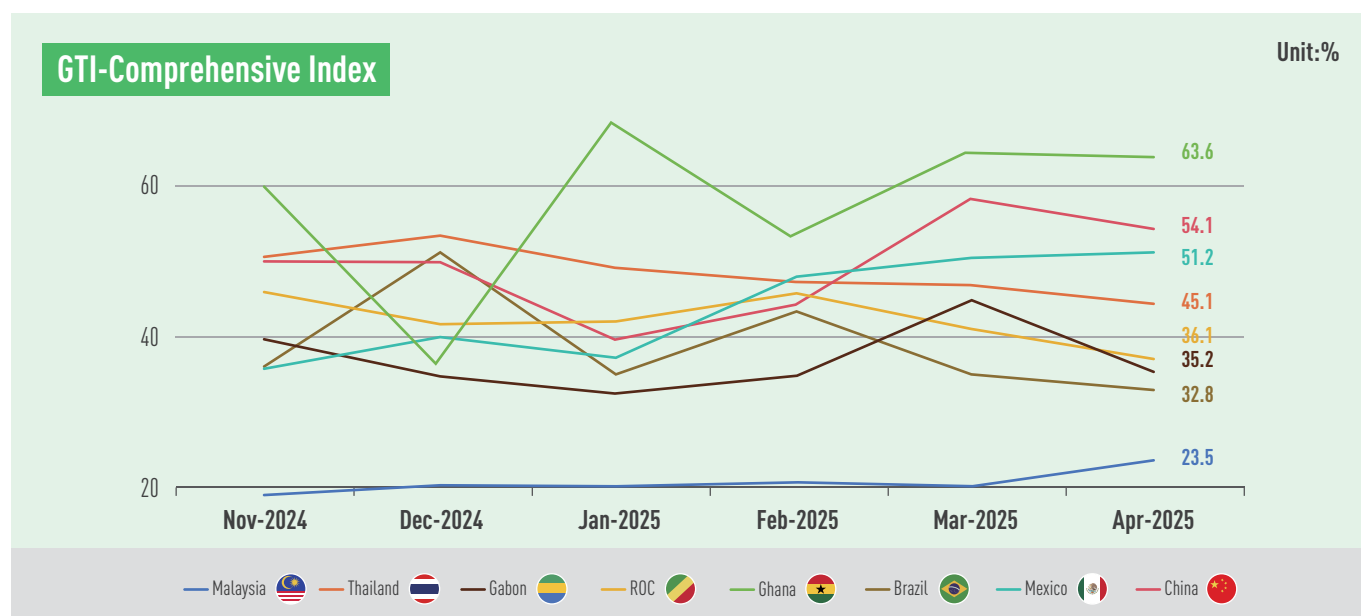
The risk level of each participant is defined by analyzing a classification matrix, which assigns greater weight to the minimum criteria and less to the complementary ones. The geospatial analysis considers two types of areas: private land areas and public production forests. The location of private areas cannot overlap with conservation units, indigenous lands, and traditional community areas. This analysis allowed companies to increase the security of their purchases, with some companies even adopting 100% VTO as a standard procedure for their procurement processes. It is concluded that independent company verification increases the likelihood of responsible purchasing, reducing risks within supply chain and increasing credibility with customers/clients.

The best practice above has been provided by AIMEX, the Association of Timber Exporting Industries of the State of Pará. We are also thanks to the support from Engenharia de Projetos Ltda., the GTI focal point in Brazil, for their contribution to the GTI Platform. For further information on this best practice, please contact Deryck Pantoja Martins at diretor.executivo@aimex.com.br.



Overview of the GTI Index

**Ghana, China, and Mexico lead gains in the GTI index;
US tariff policies trigger trade adjustments in many countries**



The Global Timber Index (GTI) Report for April 2025 revealed that the overall performance of the global timber market improved slightly this month. The GTIs for Ghana (63.6%), China (54.1%), and Mexico (51.2%) were above the critical value of 50%, and all remained in the expansion territory for two consecutive months, thus indicating sustained growth in their timber sectors. The GTIs for Thailand (45.1%), the Republic of the Congo (36.1%), Gabon (35.2%), Brazil (32.8%), and Malaysia (23.5%) were below the critical value in April, indicating an overall decline in their timber sectors.

Positive signs were evident in some of the GTI sub-indices. For example, production volume in Ghana and China continued to rise; Mexico saw a significant increase in domestic orders; the Republic of the Congo's export market stabilized after a period of contraction; and the decline in harvesting activities eased in both Malaysia and Brazil.

In the field of sustainable forest management, on April 16, the United Nations General Assembly adopted the resolution "United Nations Decade for Afforestation and Reforestation in line with Sustainable Forest Management (2027-2036)". The adoption, which is based on recommendations from the first International Conference on Afforestation and Reforestation held in Brazzaville of the Republic of the Congo last July, aims to promote the restoration of forest ecosystems. In addition, Malaysia's Sabah State Legislative Assembly had passed the Forest Enactment (Amendment) Bill 2025, which introduces stiffer penalties for forest-related offences. In Thailand, the government is actively addressing issues related to the European Union Deforestation Regulation (EUDR). On April 9, a meeting of National Committee on EUDR discussed guidelines and mechanisms for the effective operations of the committee, aiming to integrate agencies and stakeholders along the entire supply chain, thus enabling production and export to the European Union in compliance with the EUDR.

Recently, the United States imposed additional tariffs on products from many countries, sparking widespread concern in the world. Although the 24% tariff on imports from Malaysia is lower than that of some other ASEAN countries, it still poses significant pressure on Malaysian furniture industry, especially in Muar. In Thailand, the GTI sampled enterprises reported that the US tariff policy and the delay in negotiations between the Thai government and the US had led to a halt in purchases. For Brazil, the United States announced a 10% tariff on imports from the country, and the moderate tariff removes the country from the list of main US targets. However, GTI-Brazil enterprises reported that following the US imposition of tariffs globally, relevant parties were awaiting further developments before making decisions. In addition, on April 14, Brazil's Economic Reciprocity Law officially came into effect. The legislation allows the government to adopt countermeasures against countries and economic blocs that impose unilateral trade barriers on Brazilian products. In China, some enterprises reported a shortage of North America wood, and according to news from a press conference held by the China Council for the Promotion of International Trade (CCPIT) on April 28, a recent survey conducted by the CCPIT among over 1,100 foreign trade enterprises nationwide revealed that the frequent changes in US tariff policies had significantly increased uncertainty. As a result, nearly 50% of the enterprises indicated that they would reduce their business with the US. Meanwhile, 75.3% of the enterprises planned to expand into emerging markets to compensate for the decreased exports to the US.

1. The Global Timber Index (GTI) is an index system that comprehensively reflects the overall trend of global timber production and trade. It is completed by the participation of major ITTO timber producers and consumers members. The survey covers timber harvesting, trade, manufacturing including production, orders, imports and exports, employees, inventory and raw material prices and other business indicators. It is of a great significance as a guide to business operations, industry investment, and will aid formulation of national policies.

2. The GTI index reflects the monthly prosperity trend of a country's timber market. It does not reflect the competitiveness of a country's timber market, can not be used for ranking or comparing the timber market among countries.

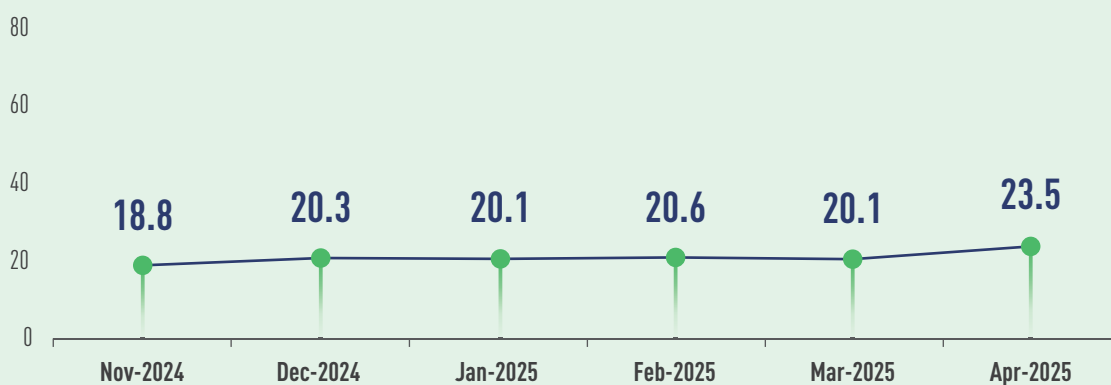


GTI-Malaysia Index in April 2025



GTI-Malaysia Comprehensive Index

Unit: %



Recently, the United States announced a 24% tariff on imports from Malaysia. Although this rate is lower than that of some other ASEAN countries, it still poses significant pressure on Malaysian industries such as furniture. Muar, one of the important furniture hubs in Malaysia, accounts for 60% of Malaysia's furniture exports. A Malaysian official said that if the tariff issue is not resolved, the furniture industry in Muar would suffer a severe blow. In Sarawak, the state premier said that the Sarawak government is planning to amend the state's biodiversity laws to enable the Sarawak Biodiversity Centre (SBC) to commercialise its research. In addition, the Sarawak government is exploring the cultivation of a fast-growing indigenous tree species, commonly known as Kalapayang, which is said to have a better quality texture than Acacia, another fast-growing species typically used for wood production. And in Sabah, the state legislative assembly had passed the Forest Enactment (Amendment) Bill 2025, which introduces stiffer penalties for forest-related offences, that is, for illegal logging or unauthorised felling of trees in forest reserves or on state land, the maximum fine has been raised to RM5 million, with jail terms ranging from 2 to 20 years.

In April 2025, the GTI-Malaysia index registered 23.5%, an increase of 3.4 percentage points from the previous month, was below the critical value (50%) for 30 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Malaysia index shrank from last month, however, the contraction had eased slightly.

As for the twelve sub-indexes, all the indexes were below the critical value. Compared to the previous month, the indexes for harvesting, new orders, export orders, purchase quantity, inventory of main raw materials, employees, and delivery time increased by 0.7-11.1 percentage point(s); the indexes for production, existing orders, purchase price, and market expectation were unchanged from the previous month; and the index for inventory of finished products declined by 5.0 percentage point.



Peeling in Tan Chee Seng Sawmill Perak, Malaysia. Photo: Khairul nizam

Table: Overview of GTI-Malaysia Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	18.8	20.3	20.1	20.6	20.1	23.5	3.4 ↑	Contract
Harvesting Index	14.3	0.0	7.1	14.3	14.3	21.4	7.1 ↑	Contract
Production Index	22.2	12.5	12.5	18.8	18.8	18.8	0.0	Contract
New Orders Index	15.0	30.0	30.0	25.0	25.0	30.0	5.0 ↑	Contract
Export Orders Index	25.0	25.0	20.0	25.0	25.0	35.0	10.0 ↑	Contract
Existing Orders Index	30.0	30.0	30.0	35.0	35.0	35.0	0.0	Contract
Inventory Index of Finished Products	45.0	50.0	50.0	50.0	50.0	45.0	-5.0 ↓	Contract
Purchase Quantity Index	16.7	27.8	27.8	22.2	22.2	33.3	11.1 ↑	Contract
Purchase Price Index	50.0	55.6	61.1	44.4	38.9	38.9	0.0	Contract
Inventory Index of Main Raw Materials	22.2	16.7	16.7	11.1	5.6	6.3	0.7 ↑	Contract
Employees Index	20.0	20.0	15.0	20.0	20.0	25.0	5.0 ↑	Contract
Delivery Time Index	16.7	16.7	22.2	22.2	22.2	27.8	5.6 ↑	Contract
Market Expectation Index	-	-	5.0	10.0	15.0	15.0	0.0	Contract



Main Challenges Reported by GTI-Malaysia Enterprises

- The market was on hold.
- The supply of raw materials was limited.
- The demand for wood was low.
- Enterprises faced challenges such as US trade tariff and currency exchange.
- There was a shortage of logs suitable for producing face veneer.
- Orders decreased, and freight costs to USA increased.
- There was a shortage of plywood demand for export, and at the same time, there was a lack of logs.



Main Suggestions from GTI-Malaysia Enterprises

- Slow down production.
- Suggest that the government increase spending on building and infrastructure expansion, so as to increase consumption of building materials and sawnwood.

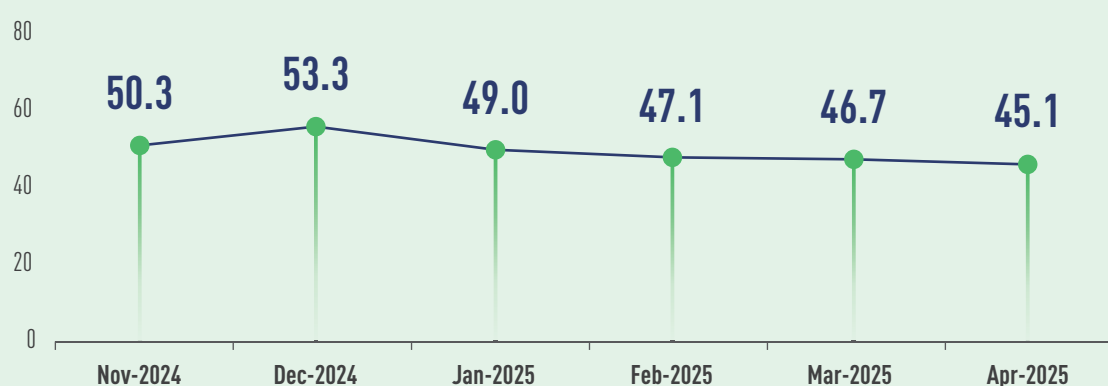


GTI-Thailand Index in April 2025



GTI-Thailand Comprehensive Index

Unit: %



Thailand's Commerce Minister said the country's exports surged by 17.8% year-on-year to US\$29.54 billion in March 2025, hitting the highest level in three years. By country, exports to the United States, Thailand's biggest market, rose 34.3% from a year earlier, while shipments to China increased 22.4%. Currently, the Thai government is actively addressing issues related to the European Union Deforestation Regulation (EUDR). According to news of the official website of the Royal Forest Department of Thailand, on April 9, the Department attended a meeting of National Committee on EUDR, chaired by Thai Deputy Prime Minister and Minister of Digital Economy and Society. The meeting focused on guidelines and mechanisms for the effective operations of the national committee, aiming to integrate agencies and stakeholders along the entire supply chain, thus enabling production and export to the European Union in compliance with the EUDR. Established by the Prime Minister of Thailand, the committee seeks to address issues of products affected by the EUDR, including cattle, cocoa, coffee, oil palm, rubber, soya and wood. From March 31 to April 4, Thailand and the European Union (EU) held the fifth round of free trade agreement (FTA) negotiations, and the two sides reached a preliminary agreement in principle on two additional chapters, including: 1) Customs Procedures and Trade Facilitation, which aims to improve the efficiency and timeliness of customs operations; 2) Sustainable Food Systems. Also, both sides began negotiations on market access for goods during this round and agreed to exchange initial offers on services and investment in early June 2025.

In April 2025, the GTI-Thailand index registered 45.1%, a decrease of 1.6 percentage points from the previous month, was below the critical value (50%) for 4 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Thailand index shrank from last month. According to feedback from GTI-Thailand enterprises, there were many holidays in Thailand this month, which to some extent, led to a slowdown in timber industry activities.

As for the twelve sub-indices, three index (employees, delivery time, and market expectation) were at the critical value of 50%, while the remaining nine indexes (harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, and inventory of main raw materials) were all below the critical value. Compared to the previous month, the indexes for inventory of main raw materials, employees, delivery time, and market expectation increased by 5.9-11.5 percentage points; the indexes for inventory of finished products, and purchase quantity were unchanged from the previous month; and the indexes for harvesting, production, new orders, export orders, existing orders, and purchase price declined by 0.2-12.5 percentage point(s).



Rong Kwang Sawmill in Phrae, Thailand. Photo: Forest Industry Organization (FIO)

Table: Overview of GTI-Thailand Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	50.3	53.3	49.0	47.1	46.7	45.1	-1.6 ↓	Contract
Harvesting Index	50.0	38.9	39.3	50.0	50.0	45.5	-4.5 ↓	Contract
Production Index	58.3	54.5	52.6	53.6	50.0	37.5	-12.5 ↓	Contract
New Orders Index	53.8	62.5	55.3	50.0	52.9	47.1	-5.8 ↓	Contract
Export Orders Index	58.3	60.0	71.4	37.5	50.0	41.7	-8.3 ↓	Contract
Existing Orders Index	38.5	42.3	40.0	46.7	47.1	41.2	-5.9 ↓	Contract
Inventory Index of Finished Products	50.0	34.6	50.0	30.0	38.2	38.2	0.0	Contract
Purchase Quantity Index	45.8	45.8	50.0	46.2	46.7	46.7	0.0	Contract
Purchase Price Index	50.0	53.8	63.2	67.9	46.9	46.7	-0.2 ↓	Contract
Inventory Index of Main Raw Materials	37.5	38.5	44.7	17.9	34.4	40.6	6.2 ↑	Contract
Employees Index	50.0	42.3	40.0	50.0	41.2	50.0	8.8 ↑	Stable
Delivery Time Index	38.5	57.7	45.0	46.4	44.1	50.0	5.9 ↑	Stable
Market Expectation Index	-	50.0	42.5	50.0	38.5	50.0	11.5 ↑	Stable



Main Challenges Reported by GTI-Thailand Enterprises

- The volume of orders decreased.
- Sales were down.
- The market competition was fierce.
- Cash flow was a problem.
- Timber quality was unstable.
- There was a shortage of labor and a lack of professional skills.
- During the month of April, there were many holidays. Customers had decreased product orders.
- The raw materials for processed grade C rubberwood were mainly used for export, resulting in a shortage of the materials for local production.
- The US tariff policy and the delay in negotiations between the Thai government and the US had led to a halt in purchases.
- Problems with suppliers led to a decrease in orders.



Main Suggestions from GTI-Thailand Enterprises

- Reduce production costs.
- Look for better sources of timber.
- Suggest that the government reduce tax expenditure.
- Ask the government to limit the export quota for each factory, so that domestic entrepreneurs do not suffer.
- Schedule production and holidays in accordance with customer orders.

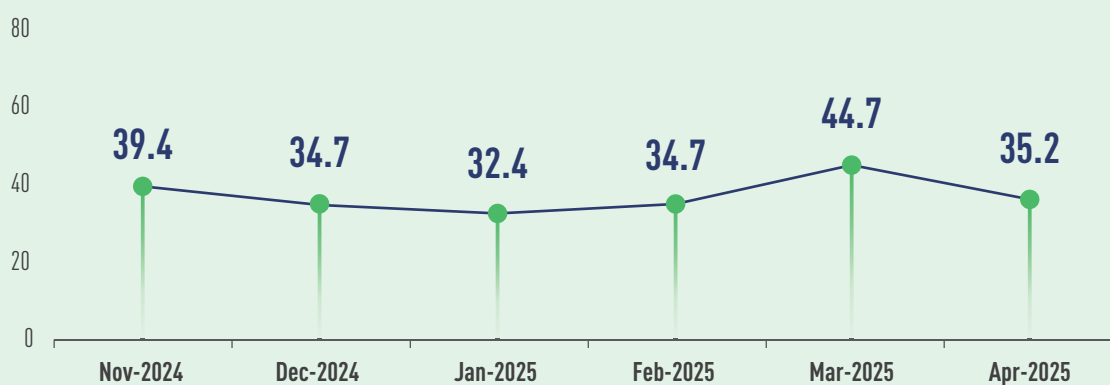


GTI-Gabon Index in April 2025



GTI-Gabon Comprehensive Index

Unit: %



Brice Clotaire Oligui Nguema, Gabon's transitional president, officially launched rehabilitation work for the Bifoun-Lambaréné road recently. This 79-kilometer road connects Libreville to the interior of the country, and with a total cost of approximately 45.6 billion CFA francs, the project is expected to be completed within three years. From April 22 to 25, the first edition of Multi-Stakeholder Forum on Communication Development and Environmental Information in the Congo Basin (FOMADECIE-BC) was held, which highlights the importance of communication in the fight against climate change and the preservation of forests in Congo Basin. Speaking on behalf of Gabon, Dr. Aurélie Flore Koumba Pambo emphasized during her presentation that it is imperative to develop targeted campaigns and create spaces for dialogue to influence public policies in favor of conservation. Gabonese media recently reported that, according to data published by the Directorate General of Economy and Fiscal Policy, Gabon's timber sector recorded a 6.6% decline in production activity in the fourth quarter of 2024, mainly due to insufficient log supply and weakening Chinese demand. Regarding this, a representative of International Tropical Timber Technical Association (ATIBT) in Libreville said that, this decline must be analyzed with caution, and encouragingly, the momentum gained in local processing, certification, and forest governance remains strong and should help Gabon be seen as a reliable supplier of tropical timber worldwide.

In April 2025, the GTI-Gabon index registered 35.2%, a decrease of 9.5 percentage points from the previous month, was below the critical value (50%) for many months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Gabon index shrank from the previous month, and the degree of contraction rose.

As for the twelve sub-indexes, three indexes (purchase price, delivery time, and market expectation) were at the critical value of 50%, while the remaining nine indexes (harvesting, production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, inventory of main raw materials, and employees) were all below the critical value. Compared to the previous month, the index for production increased by 7.4 percentage points; the indexes for delivery time and market expectation were unchanged from the previous month; and the indexes for harvesting, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, inventory of main raw materials, and employees declined by 0.9-26.2 percentage point(s).

Table: Overview of GTI-Gabon Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	39.4	34.7	32.4	34.7	44.7	35.2	-9.5 ↓	Contract
Harvesting Index	27.8	23.1	36.7	25.0	46.4	44.4	-2.0 ↓	Contract
Production Index	37.5	40.0	25.0	35.7	36.4	43.8	7.4 ↑	Contract
New Orders Index	31.8	21.4	32.4	30.0	42.9	16.7	-26.2 ↓	Contract
Export Orders Index	33.3	31.3	38.5	35.7	40.9	25.0	-15.9 ↓	Contract
Existing Orders Index	22.7	17.9	35.3	40.0	46.4	22.2	-24.2 ↓	Contract
Inventory Index of Finished Products	36.4	42.9	35.3	30.0	46.4	33.3	-13.1 ↓	Contract
Purchase Quantity Index	50.0	38.9	27.3	25.0	40.9	40.0	-0.9 ↓	Contract
Purchase Price Index	62.5	62.5	41.7	50.0	54.5	50.0	-4.5 ↓	Stable
Inventory Index of Main Raw Materials	57.1	50.0	41.7	41.7	60.0	40.0	-20.0 ↓	Contract
Employees Index	40.9	32.1	35.3	35.0	46.4	38.9	-7.5 ↓	Contract
Delivery Time Index	43.8	45.8	34.6	37.5	50.0	50.0	0.0	Stable
Market Expectation Index	-	42.3	61.5	45.0	50.0	50.0	0.0	Stable



Main Challenges Reported by GTI-Gabon Enterprises

- The sales of logs were sluggish.
- The export tax rates increased and the road conditions were poor.
- The logistics speed of transporting logs from the forest to the factory was slow.
- Expatriates were not allowed to exceed 5% of staff in production.
- Orders from China decreased and the local market was sluggish.
- There was a lack of European orders and new sales channels.



Main Suggestions from GTI-Gabon Enterprises

- Obtain forestry permits.
- Improve the condition of roads and railways.
- Strengthen communication with foreign customers and seek to employ a higher proportion of foreigners.
- Suggest that the Gabonese government increase its focus on the timber sector and adjust certain management mechanisms.

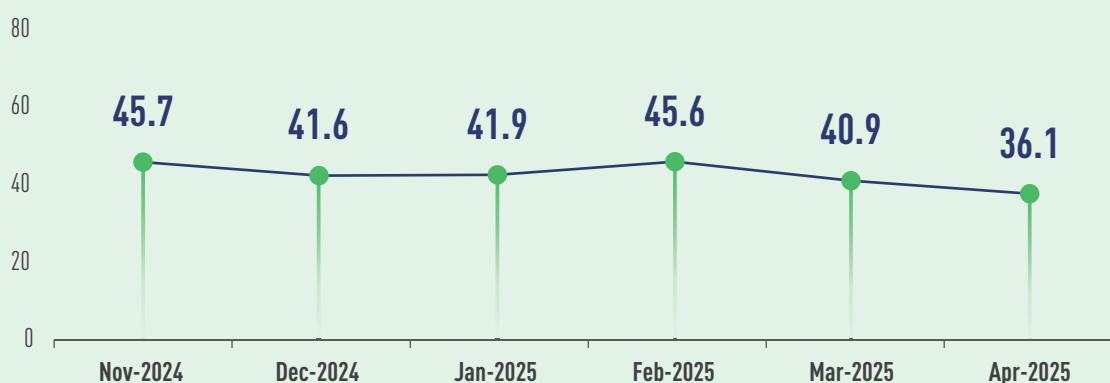


GTI-ROC Index in April 2025



GTI-ROC Comprehensive Index

Unit: %



On April 16, the United Nations General Assembly adopted the resolution "United Nations Decade for Afforestation and Reforestation in line with Sustainable Forest Management (2027-2036)". The adoption, which is based on recommendations from the first International Conference on Afforestation and Reforestation held in Brazzaville of the Republic of the Congo (ROC) last July, aims to promote the restoration of forest ecosystems. Rosalie Matondo, ROC's Minister of Forest Economy, said the country is implementing actions through the National Afforestation and Reforestation Program, which involves reforesting hundreds of hectares each year. At a recent meeting of the "Project to Strengthen the Sustainable Wood Energy Potential in the Republic of the Congo", Hydevert MOUNKALA, the Coordinator of the project, noted that the major difficulty observed in 2024 was the high mortality rate of *Acacia mangium* plants, which had significantly hindered the implementation of the project. To overcome this difficulty, it was recommended to plant only during the rainy season. On April 14, Sylvain Lekaka, the country's Chief of Staff of the Minister of the Economy, Planning and Regional Integration, expressed the need to incorporate climate and environmental risk assessment into every public investment decision. To this end, rigorous project evaluation is needed, and it also involves leveraging innovative financing mechanisms, such as international climate funds, green bonds, and public-private partnerships, to finance green infrastructure.

In April 2025, the GTI-ROC index registered 36.1%, a decrease of 4.8 percentage points from the previous month, still below the critical value of 50%, indicating that the business prosperity of the superior timber enterprises represented by the GTI-ROC index shrank from the previous month. Although the total volume of new orders decreased slightly, the export orders held steady this month.

As for the twelve sub-indexes, one index (export orders) was at the critical value of 50%, while the remaining eleven indexes (harvesting, production, new orders, existing orders, inventory of finished products, purchase quantity, purchase price, inventory of main raw materials, employees, delivery time, and market expectation) were all below the critical value. Compared to the previous month, the indexes for new orders, export orders, purchase price, and delivery time increased by 0.4-5.0 percentage point(s); the index for purchase quantity was unchanged from the previous month; and the indexes for harvesting, production, existing orders, inventory of finished products, inventory of main raw materials, employees, and market expectation declined by 1.4-8.3 percentage points.

Table: Overview of GTI-ROC Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	45.7	41.6	41.9	45.6	40.9	36.1	-4.8 ↓	Contract
Harvesting Index	50.0	43.8	45.7	47.2	45.8	44.4	-1.4 ↓	Contract
Production Index	50.0	45.8	45.5	47.2	50.0	44.4	-5.6 ↓	Contract
New Orders Index	47.7	46.0	47.9	50.0	44.0	44.4	0.4 ↑	Contract
Export Orders Index	47.6	45.8	50.0	41.7	47.8	50.0	2.2 ↑	Stable
Existing Orders Index	47.7	46.0	50.0	44.4	46.0	41.7	-4.3 ↓	Contract
Inventory Index of Finished Products	45.5	44.0	47.9	47.2	46.0	41.7	-4.3 ↓	Contract
Purchase Quantity Index	33.3	33.3	33.3	50.0	25.0	25.0	0.0	Contract
Purchase Price Index	33.3	50.0	33.3	33.3	25.0	30.0	5.0 ↑	Contract
Inventory Index of Main Raw Materials	40.0	25.0	33.3	50.0	25.0	16.7	-8.3 ↓	Contract
Employees Index	45.5	46.0	45.8	41.7	46.0	44.4	-1.6 ↓	Contract
Delivery Time Index	50.0	19.6	47.4	50.0	45.7	46.9	1.2 ↑	Contract
Market Expectation Index	-	48.2	48.1	50.0	50.0	44.4	-5.6 ↓	Contract



Main Challenges Reported by GTI-ROC Enterprises

- Some enterprises faced cash flow problems.
- Enterprises faced great operational pressure.
- The logistics for products were slow.
- Rains had restricted production and operations.
- Fuel supply was insufficient for the production.



Main Suggestions from GTI-ROC Enterprises

- Ensure fuel supply for enterprises.
- Adjust the schedule of field operation according to the weather.
- Improve road conditions to increase logistics speed.

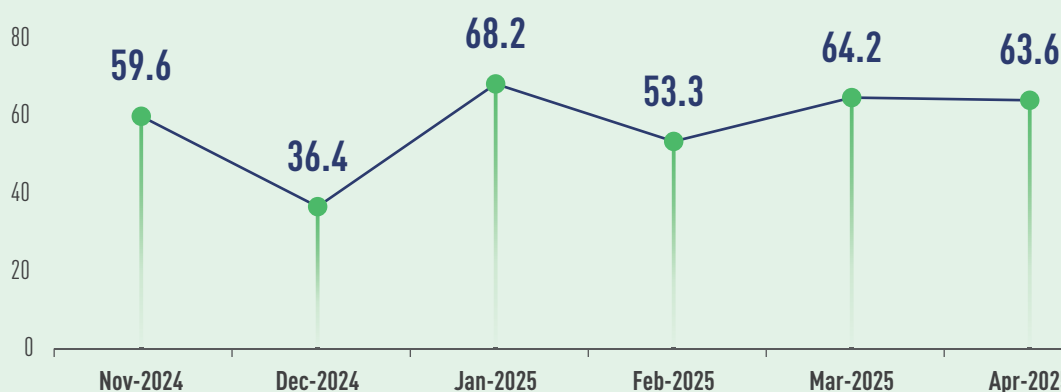


GTI-Ghana Index in April 2025



GTI-Ghana Comprehensive Index

Unit: %



Data released by Forestry Commission of Ghana revealed that Ghana's timber and wood product exports in February 2025 generated a value of €8,414,292.48 from a volume of 18,064.021 m³. This marks an 8.38% decrease in value and an 8.95% decrease in volume as compared to February 2024. The leading five wood products exported were Lumber (Air Dried), Billet, Lumber (Kiln Dried), Plywood (Overland), and Rotary Veneer, and the top five species in terms of volume harvested were Teak, Wawa, Denya, Ceiba, and Gmelina. Recently, the Forestry Commission, the Ministry of Lands and Natural Resources, other relevant agencies, and representatives from the timber industry, met to review timber stumpage fees in the country. Following a series of meetings, discussions and deliberations, the stakeholders had agreed that stumpage fees should be increased to 30% of the legally mandated fees, set to take effect on April 2, 2025, and this will gradually increase to 70% over the next two years. In other news, the Public Utilities Regulatory Commission (PURC) of Ghana announced a 14.75% upward adjustment in average end-user electricity tariffs and a 4.02% increase in water tariffs, effective May 2025, which would intensify the existing pressures on businesses as they navigate the challenges posed by inflation.

In April 2025, the GTI-Ghana index registered 63.6%, a decrease of 0.6 percentage point from the previous month, was above the critical value (50%) for 4 consecutive months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-Ghana index expanded from the previous month. This month, the production and business activities in Ghana's timber sector were vibrant, with harvesting, production, and domestic and foreign orders all saw a notable rise in volume when compared to the previous month.

As for the twelve sub-indexes, ten indexes (harvesting, production, new orders, export orders, inventory of finished products, purchase quantity, purchase price, inventory of main raw materials, delivery time, and market expectation) were above the critical value of 50%, and two indexes (existing orders, and employees) were at the critical value. Compared to the previous month, the indexes for harvesting, new orders, export orders, existing orders, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation increased by 5.9-48.7 percentage points, and the indexes for production, inventory of finished products, and purchase price declined by 1.6-24.4 percentage points.



Factory of AYIPA WOOD COMPANY LIMITED. Photo: Peter Zormelo

Table: Overview of GTI-Ghana Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	59.6	36.4	68.2	53.3	64.2	63.6	-0.6 ↓	Expand
Harvesting Index	54.2	36.8	42.0	34.1	52.1	66.7	14.6 ↑	Expand
Production Index	62.0	20.0	75.0	50.0	81.3	61.8	-19.5 ↓	Expand
New Orders Index	54.0	35.0	34.6	15.2	22.9	67.6	44.7 ↑	Expand
Export Orders Index	50.0	44.4	23.9	2.3	14.6	63.3	48.7 ↑	Expand
Existing Orders Index	44.0	47.5	42.3	63.0	39.6	50.0	10.4 ↑	Stable
Inventory Index of Finished Products	56.0	50.0	57.7	60.9	60.4	58.8	-1.6 ↓	Expand
Purchase Quantity Index	54.3	37.5	34.6	28.3	33.3	61.8	28.5 ↑	Expand
Purchase Price Index	86.4	55.3	98.0	76.1	97.9	73.5	-24.4 ↓	Expand
Inventory Index of Main Raw Materials	56.8	50.0	58.0	56.5	52.1	67.6	15.5 ↑	Expand
Employees Index	50.0	37.5	92.3	56.5	43.8	50.0	6.2 ↑	Stable
Delivery Time Index	58.3	40.0	44.2	34.8	27.1	58.8	31.7 ↑	Expand
Market Expectation Index	-	50.0	50.0	50.0	50.0	55.9	5.9 ↑	Expand



Main Challenges Reported by GTI-Ghana Enterprises

- The market demand was low.
- The power supply was unstable.
- Challenges such as illegal logging and illegal mining existed.
- Poor road infrastructure network was a problem.
- Production costs increased, and working capital was insufficient.
- The costs of raw materials and spare parts were high.
- The costs of borrowing were high, and taxes at the port for imported raw materials and spare parts were also high.



Main Suggestions from GTI-Ghana Enterprises

- Reduce production costs.
- Government support and regulations are needed.
- Upgrade the road network and crack down on illegal mining.
- Provide financial support to enterprises such as government subsidies and soft loans from banks.
- Invest in electric power infrastructure and genset equipment.

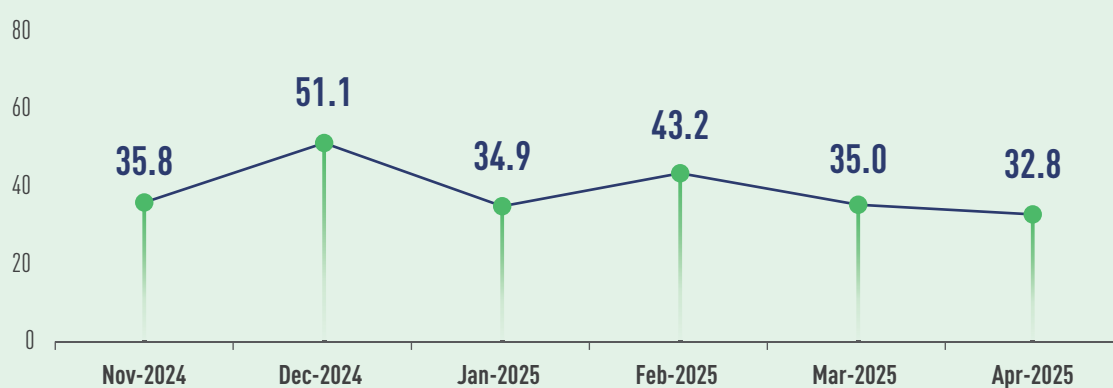


GTI-Brazil Index in April 2025



GTI-Brazil Comprehensive Index

Unit: %



Recently, the United States announced a 10% tariff on imports from Brazil. Analysts pointed out that the moderate tariff removes the country from the list of main US targets, and may also have a relatively low impact on its export agenda. Currently, the United States is the main export destination for Brazilian furniture, and before the imposition of the 10% rate, the average tariff for Brazilian furniture to enter the country was 3.5%. On April 14, Brazil's Economic Reciprocity Law officially came into effect. The legislation allows the government to adopt countermeasures against countries and economic blocs that impose unilateral trade barriers on Brazilian products. In March, Brazilian exports of wood-based products (excluding pulp and paper) reached US\$339.4 million, up 18.0% year-over-year. In details, tropical sawnwood, tropical plywood, and wooden furniture all saw a significant growth in export value. On April 9, Geraldo Alckmin, Brazil's Acting President and Minister of Development, Industry, Trade, and Services (MDIC), participated in the groundbreaking ceremony for Arauco's new pulp plant in Mato Grosso do Sul. And according to Arauco, it would be the world's largest pulp production project implemented in a single phase.

In April 2025, the GTI-Brazil index registered 32.8%, a decrease of 2.2 percentage points from the previous month, was below the critical value (50%) for 4 consecutive months,

indicating that the business prosperity of the superior timber enterprises represented by the GTI-Brazil index shrank from the previous month.

As for the twelve sub-indexes, two indexes (inventory of finished products, and purchase price) were above the critical value of 50%, while the remaining ten indexes (harvesting, production, new orders, export orders, existing orders, purchase quantity, inventory of main raw materials, employees, delivery time, and market expectation) were all below the critical value. Compared to the previous month, the indexes for harvesting, production, export orders, existing orders, inventory of finished products, purchase price, delivery time, and market expectation increased by 1.3-9.4 percentage points, and the indexes for new orders, purchase quantity, inventory of main raw materials, and employees declined by 4.0-12.0 percentage points.

Table: Overview of GTI-Brazil Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	35.8	51.1	34.9	43.2	35.0	32.8	-2.2 ↓	Contract
Harvesting Index	30.0	16.7	31.3	27.8	39.3	45.5	6.2 ↑	Contract
Production Index	37.5	42.9	30.0	41.7	26.9	33.3	6.4 ↑	Contract
New Orders Index	21.4	57.1	30.0	38.5	32.1	28.1	-4.0 ↓	Contract
Export Orders Index	33.3	66.7	33.3	45.8	26.9	30.0	3.1 ↑	Contract
Existing Orders Index	50.0	57.1	50.0	42.3	39.3	40.6	1.3 ↑	Contract
Inventory Index of Finished Products	75.0	85.7	80.0	61.5	50.0	59.4	9.4 ↑	Expand
Purchase Quantity Index	45.5	28.6	38.9	50.0	36.4	25.0	-11.4 ↓	Contract
Purchase Price Index	50.0	50.0	55.6	65.0	54.5	57.1	2.6 ↑	Expand
Inventory Index of Main Raw Materials	45.5	64.3	44.4	59.1	37.5	32.1	-5.4 ↓	Contract
Employees Index	42.9	57.1	45.0	46.2	46.4	34.4	-12.0 ↓	Contract
Delivery Time Index	45.8	35.7	33.3	40.9	37.5	39.3	1.8 ↑	Contract
Market Expectation Index	-	50.0	21.4	42.9	28.6	31.3	2.7 ↑	Contract



Guillotine in Belém, Brazil. Photo: Fernanda Tocantins



Lamapa Facade in Belém, Brazil. Photo: Fernanda Tocantins



Brief on Brazilian Timber Industry



- The forestry sector has significantly expanded its production base, marked by a substantial increase in planted forest areas. Mato Grosso do Sul state recorded a 471% growth between 2010 and 2024, while Bahia state has already reached 700,000 hectares of eucalyptus plantations. This expansion has been accompanied by sustainable practices such as the adoption of forest mosaics and the restoration of degraded areas, demonstrating a commitment to balancing production with environmental conservation.
- The state of Minas Gerais has taken a strategic step with the release of the study “Potential of the Forestry Production Chain”, which identified 22 million hectares with the potential to attract forest-based industries. This initiative is part of the “Minas Invests+Forests” Program, which also modernized the state’s environmental licensing system, enhancing Minas Gerais’ competitiveness in attracting investments to the forest-based sector.
- The integration of crop-livestock-forestry (lavoura-pecuária-floresta) systems has gained prominence through innovative models such as the BoiTeça (CowTeak) system, developed in Mato Grosso by TRC (Teak Resources Company) in partnership with EMBRAPA (Brazilian Agricultural Research Corporation). This system combines cattle ranching and teak plantations within the same area, offering producers future income opportunities without upfront costs. It promotes efficient land use, improves thermal comfort for livestock, contributes to carbon sequestration, and has even drawn interest from international investors.
- Brazil is expanding its role in the international trade of forest products, particularly with the United States. Sawnwood, charcoal, and wood-based products make up 9.3% of Brazilian exports exempt from the new 10% U.S. tariff, totaling US\$ 11.4 billion, or 27% of Brazil’s exports to the U.S. in 2024. Although spared from the surcharge, the sector remains under national security investigation. In response, the export of legal, traceable, and sustainably managed timber has become a commercial and diplomatic asset, reinforcing Brazil’s position as a strategic supplier in global ESG-driven value chains. In this context, the export of legal, traceable timber from sustainably managed forests has stood out as both a commercial and diplomatic advantage, aligned with the growing global demand for low-impact, environmentally responsible products that meet ESG standards.

Information provided by GTI-Brazil Focal Point



Log Stock in Belém, Brazil. Photo: Fernanda Tocantins



Muiracatiara Sawmill in Belém, Brazil. Photo: Fernanda Tocantins



Main Challenges Reported by GTI-Brazil Enterprises

- One of the main problems was the default of domestic market clients.
- Red tape at Brazilian Institute of Environment and Renewable Natural Resources (IBAMA) and the port was a challenge.
- There was instability in the prices charged (increase) for railway transport via Rondonópolis municipality.
- The market was at a standstill. Following the USA's imposition of tariffs globally, all parties were awaiting further developments before making decisions.
- There was speculation about tariffs and dumping in major buyer/importer regions.
- There were delays in the issuance of CITES permit authorization and LPCO export license by IBAMA.
- The pressure for lower teak log prices in India persisted, with signs that sawnwood for this destination may also be affected.
- There were delays in the approval of documentation by IBAMA, particularly for Ipê and Cumaru, which are listed under CITES (Appendix II).



Main Suggestions from GTI-Brazil Enterprises

- Strengthen workforce training.
- Improve overall process efficiency.
- Promote the industrialization of the production chain.
- Faster processing by IBAMA is needed.
- A joint effort between companies, industry associations, and the government is needed to minimize the impacts of the potential tariffs.
- Seek other markets outside the United States, and attempt to reduce the reliance on the United States.
- Expand sales outside of India and explore other port alternatives, such as the Port of Paranaguá in the state of Paraná.

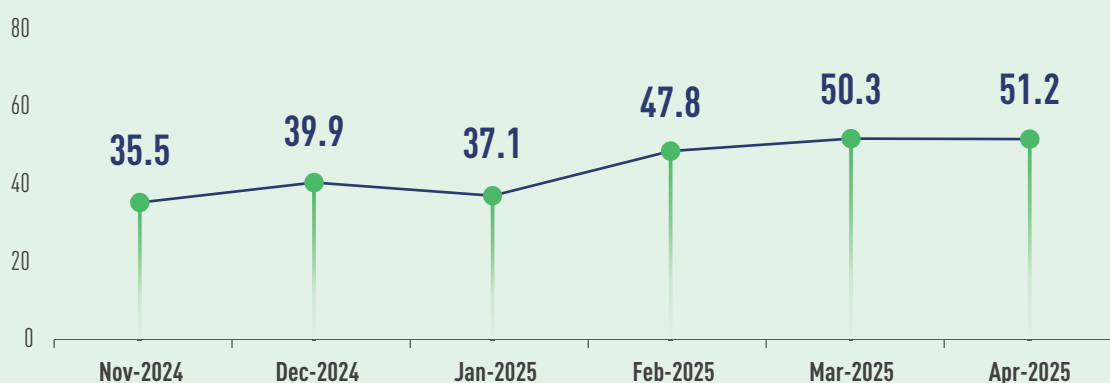


GTI-Mexico Index in April 2025



GTI-Mexico Comprehensive Index

Unit: %



Data released by Mexico's national statistics agency INEGI on April 28 showed that Mexico's exports in March 2025 amounted to US\$55.52 billion, a year-on-year increase of 9.6%, while imports reached \$52.08 billion, up 7.1%. On April 24, Mexico's Secretariat of Environment and Natural Resources (SEMARNAT) announced that it would simplify 13 administrative procedures, including the authorization for the exploitation of wooden resources on forest lands, starting from May 15, 2025. The simplification includes measures such as the elimination of document verification and the implementation of electronic channels, so as to improve efficiency, reduce costs, and facilitate the public. Recently, the Mexican government announced an increase in its housing construction target under the Housing for Well-being program, aiming to build 1.1 million homes during president Claudia Sheinbaum's administration. This represents an addition of 100,000 homes to the program's original goal, which may drive growth in industries such as timber.

In April 2025, the GTI-Mexico index registered 51.2%, an increase of 0.9 percentage point from the previous month, was above the critical value (50%) for 2 consecutive months, indicating that the business prosperity of the superior

timber enterprises represented by the GTI-Mexico index expanded from the previous month. This month, the volume of both harvesting and production continued to grow. In terms of market performance, the export market saw a significant contraction. However, due to strong growth in domestic demand, the total volume of new orders still maintained an upward trend.

As for the twelve sub-indexes, seven indexes (harvesting, production, new orders, purchase quantity, purchase price, inventory of main raw materials, and market expectation) were above the critical value of 50%, while the remaining five indexes (export orders, existing orders, inventory of finished products, employees, and delivery time) were all below the critical value. Compared to the previous month, the indexes for production, inventory of finished products, purchase price, inventory of main raw materials, employees, and delivery time increased by 0.3-9.5 percentage point(s), and the indexes for harvesting, new orders, export orders, existing orders, purchase quantity, and market expectation declined by 0.8-8.3 percentage point(s).

Table: Overview of GTI-Mexico Sub-Indexes (%)



	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	35.5	39.9	37.1	47.8	50.3	51.2	0.9 ↑	Expand
Harvesting Index	29.2	29.2	34.1	36.8	59.1	58.3	-0.8 ↓	Expand
Production Index	28.6	35.7	28.9	44.1	55.0	55.3	0.3 ↑	Expand
New Orders Index	43.8	41.7	39.1	55.0	56.5	54.0	-2.5 ↓	Expand
Export Orders Index	33.3	50.0	50.0	50.0	33.3	25.0	-8.3 ↓	Contract
Existing Orders Index	37.5	41.7	34.8	37.5	47.8	44.0	-3.8 ↓	Contract
Inventory Index of Finished Products	27.1	31.3	30.4	45.0	41.3	46.0	4.7 ↑	Contract
Purchase Quantity Index	32.1	40.6	34.6	50.0	60.7	59.4	-1.3 ↓	Expand
Purchase Price Index	69.2	58.8	71.4	63.3	64.3	67.6	3.3 ↑	Expand
Inventory Index of Main Raw Materials	26.7	43.8	35.7	50.0	46.4	55.9	9.5 ↑	Expand
Employees Index	33.3	37.5	37.0	42.5	45.7	48.0	2.3 ↑	Contract
Delivery Time Index	39.6	43.8	47.5	45.0	39.1	40.0	0.9 ↑	Contract
Market Expectation Index	-	89.6	82.6	87.5	82.6	81.0	-1.6 ↓	Expand



Open air drying of wood, Mexico. Photo: Industria Forestal Pueblos Mancomunados



Wood Debarker, Mexico. Photo: Forestal Xochiapa



Brief on Mexican Timber Industry



Introduction

The following report presents Timber Market information in Mexico for the month of March. The timber prices presented below are obtained through the National Forest Commission's Timber Pricing System (abbreviated SIPRE in Spanish). This is a digital tool created by the National Forest Commission where prices are registered and compiled for timber and non-timber products, in temperate and tropical climates. Prices are reported at a state, regional and national level.

Timber prices (\$ USD) for *Gmelina arborea* Roxb ex Sm

Melina (*Gmelina arborea* Roxb ex Sm) is a tropical Asian specie, preferred by local forest landowners for its successful ecological adaptations to Mexico's south and southeastern regions.

In 2024, the average standing timber price for Melina in Mexico was reported at 46.73 (\$USD)/m³; while the average price for long dimensional boards was reported at 59.73 (\$USD)/m³.

Standing timber (Table 1) and sawn-wood prices (Table 2) for Melina are reported at the dollar exchange rate published on March 2nd, 2025 of 20.508 Mexican pesos.

Table 1. Round wood prices (\$USD/m³) for Melina.

Roundwood prices (\$USD/m ³)				
Specie	Long dimensional boards (primary)	Long dimensional boards (secondary)		Standing timber
	Sold on the forest path	Sold on the forest path	Sold at the sawmill	
Melina	60.95	58.51	62.58	51.20

Table 2. Sawn wood prices for Melina (\$USD/board foot).

Sawn wood prices (\$USD / Board foot)			
Specie	Long dimensional boards		Short dimensional boards
	Select	Mill run	
Melina	0.975	0.975	0.741

Information provided by GTI-Mexico Focal Point



Main Challenges Reported by GTI-Mexico Enterprises

- There was a decline in product sales.
- Enterprises faced price pressure from competitors.
- There were barriers to international trade or tariff issues.
- Market demand was unstable and it was difficult to predict.
- Sales channels were limited, or channel development was insufficient.



Main Suggestions from GTI-Mexico Enterprises

- Improve roads for the transport of products.
- Make changes to legislation to reduce imports of products.
- Obtain government subsidies to reduce production costs.
- Enhance marketing and increase the added value of products.
- Fully expand the sales and distribution channels of products.



Wood Dragging, Mexico. Photo: Forestal Xochiapa



Wood Veneer Drying, Mexico. Photo: Forestal Xochiapa

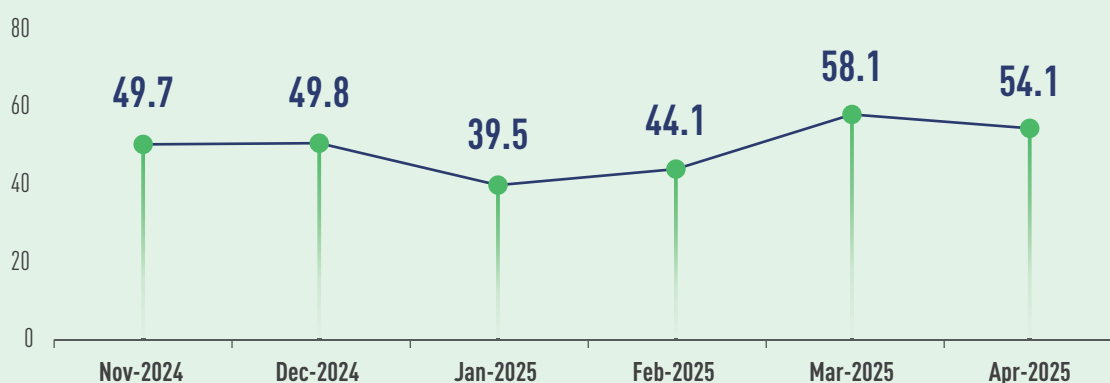


GTI-China Index in April 2025



GTI-China Comprehensive Index

Unit: %



According to a press conference held by the China Council for the Promotion of International Trade (CCPIT) on April 28, a recent survey conducted by the CCPIT among over 1,100 foreign trade enterprises nationwide revealed that the frequent changes in US tariff policies had significantly increased uncertainty, making it difficult for businesses to make long-term plans. As a result, nearly 50% of the enterprises indicated that they would reduce their business with the US. Meanwhile, 75.3% of the enterprises planned to expand into emerging markets to compensate for the decreased exports to the US. On April 18, a press conference held by China's Ministry of Natural Resources revealed that in the first quarter of 2025, China's wood production reached 25.1741 million cubic meters, marking an increase of 8.08% year-on-year. Additionally, according to customs data, from January to March 2025, China's cumulative import volume of logs and sawnwood was 13.906 million cubic meters, down by 10.60% compared to the same period last year, and the import value was approximately 20.5 billion yuan, a decrease of 8.84% year-on-year. During the same period, China's export value of furniture and its parts was 114.46 billion yuan, marking a decline of 7% compared to the same period last year.

In April 2025, the GTI-China index registered 54.1%, a decrease of 4.0 percentage points from the previous month, was above the critical value (50%) for 2 consecutive

months, indicating that the business prosperity of the superior timber enterprises represented by the GTI-China index expanded from the previous month. This month, China's timber market was in the traditional peak season, and the timber sector was generally on an upward trend with production volume and both domestic and international orders continuing to grow.

As for the twelve sub-indexes, ten indexes (production, new orders, export orders, existing orders, inventory of finished products, purchase quantity, purchase price, employees, delivery time, and market expectation) were all above the critical value of 50%, while the remaining two indexes (import, and inventory of main raw materials) were below the critical value. Compared to the previous month, the indexes for export orders, inventory of finished products, and delivery time increased by 1.3-2.8 percentage points, and the indexes for production, new orders, existing orders, purchase quantity, purchase price, import, inventory of main raw materials, employees, and market expectation declined by 0.7-11.0 percentage point(s).

Table: Overview of GTI-China Sub-Indexes (%)

	2024.11	2024.12	2025.01	2025.02	2025.03	2025.04	MoM	Performance
Comprehensive Index	49.7	49.8	39.5	44.1	58.1	54.1	-4.0 ↓	Expand
Production Index	46.9	50.0	37.9	41.4	62.1	59.1	-3.0 ↓	Expand
New Orders Index	50.0	47.1	35.7	40.5	61.3	53.6	-7.7 ↓	Expand
Export Orders Index	51.6	52.3	42.9	44.0	50.8	53.2	2.4 ↑	Expand
Existing Orders Index	51.0	45.3	37.4	41.4	54.3	52.3	-2.0 ↓	Expand
Inventory Index of Finished Products	49.0	56.4	41.2	49.1	52.7	55.5	2.8 ↑	Expand
Purchase Quantity Index	47.9	48.8	37.9	43.1	62.1	53.2	-8.9 ↓	Expand
Purchase Price Index	51.0	45.9	50.5	50.0	55.5	52.3	-3.2 ↓	Expand
Import Index	48.9	47.7	45.6	50.0	55.2	47.5	-7.7 ↓	Contract
Inventory Index of Main Raw Materials	51.6	51.7	46.7	48.3	55.9	45.9	-10.0 ↓	Contract
Employees Index	49.0	47.7	35.2	44.0	51.2	50.5	-0.7 ↓	Expand
Delivery Time Index	53.6	56.4	50.5	53.4	55.5	56.8	1.3 ↑	Expand
Market Expectation Index	-	42.4	55.5	67.2	67.4	56.4	-11.0 ↓	Expand



Main Challenges Reported by GTI-China Enterprises

- There was a shortage of North America wood.
- The market competition was fierce.
- The production costs were high.
- The recovery of funds was slow and enterprises faced great pressure.



Main Suggestions from GTI-China Enterprises

- Adjust trade policies.
- Broaden financing channels.
- Adjust production to avoid overcapacity.
- Expand international markets to increase orders.

About This Report

Survey Methodology

With the support of the International Tropical Timber Organization (ITTO), the Global Timber Index (GTI) platform has set up focal points in pilot countries of both timber producing and timber consuming countries. At present, focal points have been established in 9 countries, including Indonesia, Malaysia, Thailand, Gabon, Republic of the Congo, Ghana, Brazil, Mexico and China.

At the end of each month, focal points of the pilot countries organize the leading enterprises to fill out the GTI questionnaire, and then the Global Green Supply Chains Initiative (GGSCI) Secretariat organizes experts to summarize and analyze the data, and write the report.

Based on the characteristics of the timber and timber products industry in different countries, the current GTI questionnaire is divided into three categories: timber producing countries, timber manufacturing countries and timber consuming countries. For the timber producing countries, the questionnaire focuses on the developments of local timber harvesting and supplying, covering log, sawnwood, and veneer, etc. For timber manufacturing countries (like China), the questionnaire focuses on the developments of local timber processing and manufacturing, covering floor, door, plywood, and furniture, etc. For timber consuming countries, the questionnaire focuses on the developments of the timber products facing the end market.

Data and Interpretation

GTI index contains diffusion index and comprehensive index.

(1) The calculation of GTI diffusion index. GTI has 12 diffusion indexes (or called sub-indices) based on the data from 12 objective questions which covers production (or harvesting), new orders, new export orders, existing orders, inventory of products, purchasing quantity, import, purchasing prices of main raw materials, inventory of raw material, employees, delivery time, and market expectation. The diffusion index is calculated by adding the percentage of enterprises with positive answers to half of the percentage with unchanged answers.

(2) The calculation of GTI comprehensive index. GTI comprehensive index (GTI index for short) is calculated based on the diffusion indexes of five of the indexes with different weights: production (harvesting), new orders, inventory of raw material, employees, delivery time. The five diffusion indexes and their weights are determined according to their leading influence on the industrial economy.

The value of the index is between 0-100%, and 50% is the critical value of the index. A GTI index reading above 50 percent indicates that the industry prosperity is generally expanding; below 50 percent indicates that it is generally declining.

Declaration

GTI report is compiled based on the data provided by the timber enterprises in the pilot countries. The data can not be used in investment decision-making, but can help to understand the timber industry trend.

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ITTO
INTERNATIONAL TROPICAL
TIMBER ORGANIZATION

About ITTO

The International Tropical Timber Organization, ITTO for short, is an intergovernmental organization promoting the sustainable management and conservation of tropical forests and the expansion and diversification of international trade in tropical timber from sustainably managed and legally harvested forests. It located in Yokohama, Japan. At present, there are 76 ITTO members countries. ITTO's membership represents about 90% of the global tropical timber trade and more than 80% of the world's tropical forests.



全球林产品绿色供应链倡议
GLOBAL GREEN SUPPLY CHAINS INITIATIVE

About GGSC

Global Green Supply Chains Initiative (GGSC) is part of the Legal and Sustainable Supply Chains (LSSC) Programme, which was approved at the 53rd session of the International Tropical Timber Council for being included into the Biennial Work Programme (BWP) of International Tropical Timber Organization (ITTO). Launched in 2018 by leading Chinese enterprises in forest products industry, GGSC became an international initiative in 2019. Since then, GGSC has been acting as a global platform for serving the sustainable development of the forest products industry.

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GTI REPORT

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