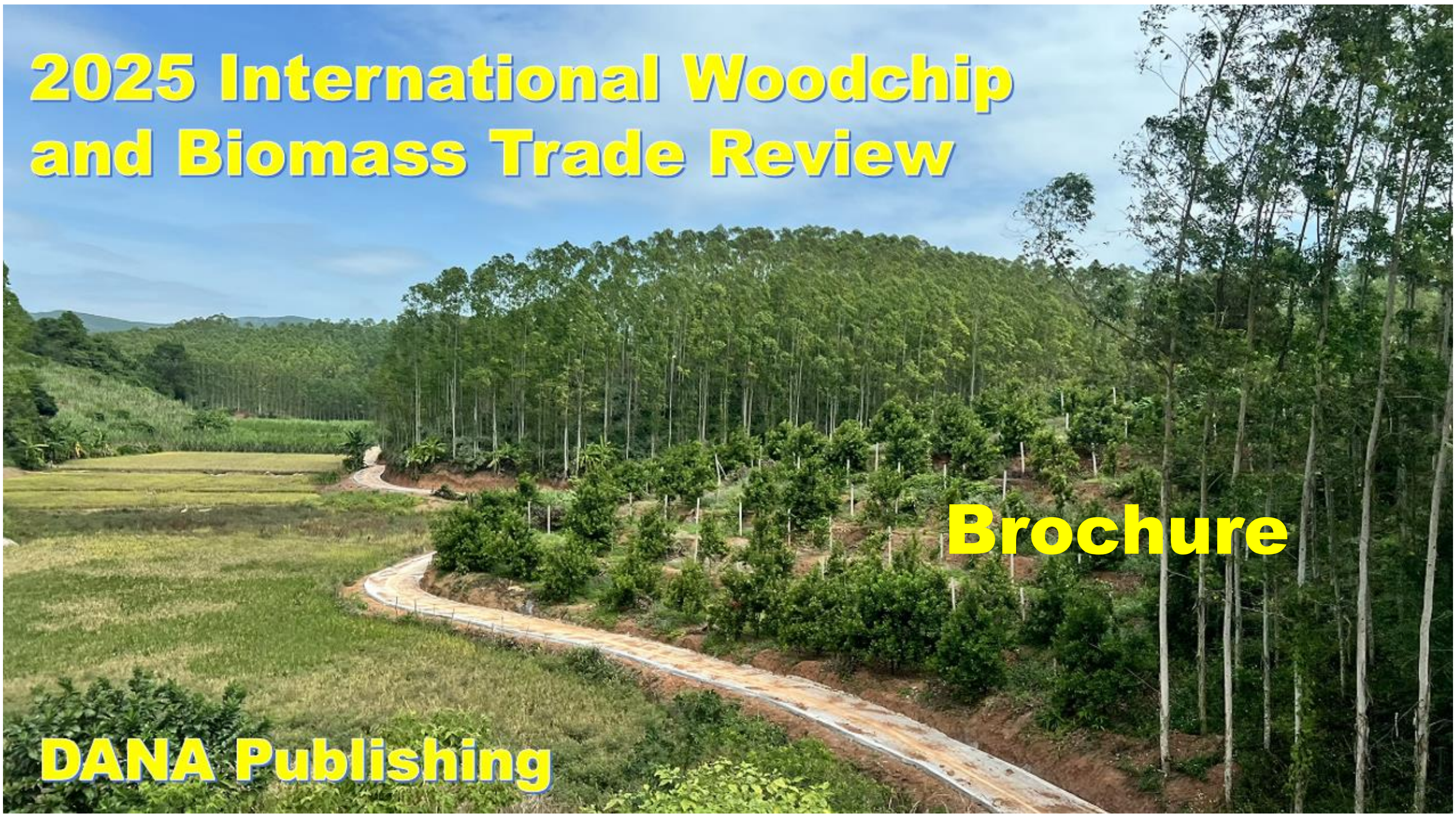

Cover Photo:

Landscape in Guangxi province in Southern China, taken by a DANA-Gingko Field Trip delegate in October 2024

- **This shows land use by farmers**
  - **Rice on flat land**
  - **Citrus fruit orchards on slightly rolling land**
  - **Eucalyptus plantations on rolling/steeper land**

The collapse in the Chinese construction market has provided more wood available for the burgeoning Guangxi pulp industry

Just how much "pulpwood" will be available - and what impact that may have on future hardwood woodchip imports?

DANA Publishing
Rotorua, New Zealand

2025 International Woodchip & Biomass Trade Review

Review Chapters

Introduction:	Conversion factors. Ten 'Top Issues' issues facing the industry in 2025
Markets Japan:	Pulp grade woodchip import trends and predictions. Major importing companies by supply volumes by importing countries
Markets Mainland China:	Details as per above for Mainland China
Markets Other Asia:	Details as per above for South Korea, Taiwan, Laos, Indonesia and India
Markets Europe and Türkiye:	Hardwood and softwood woodchip imports by supplier country in 2024 to Portugal, Spain, Finland, Sweden, Denmark, France, Iceland, Ireland and Türkiye
Markets Asia Biomass:	Japanese and Korean woodchip, wood pellet and palm kernel shell (PKS) import volumes and price trends. Japanese biomass power plants
Supply North America:	USA and Canada. Details of exporting companies and ports; 2023, 2024 and 2025E predicted export volumes by each exporter
Supply Latin America:	Argentina, Brazil, Chile and Uruguay. Details as per above — Paraguay development
Supply Oceania:	Australia, New Zealand & Fiji. Details as per above
Supply South East Asia:	Indonesia, Malaysia, Thailand & Vietnam. Details as per above
Supply Africa:	Previous/planned export countries: Angola, Cameroon, Ghana and Republic of Congo. For South Africa and Mozambique. Details as above
Seaborne Woodchip Transportation:	Details of 165 specialised woodchip carriers
Conclusions & Predictions:	Summary and details of all market demand predictions 2025–2029; and all supply countries predictions, and Asia Pacific balance of wood fibre surpluses or deficits 2025–2029. Also prices in 2024 and predicted prices in 2025 and 2029 for major species/countries
Contacts Registry:	Contacts for woodchip suppliers, trading and end user companies

Ten Issues Facing The Woodchip Trade In 2025 (More Details in Review)

1. The largest (hardwood) woodchip importer China after a 20% slump in demand in 2023, again imported a record volume in 2024. What will 2025 bring?

2. Japan was overtaken by China as the major North Asian importer several years ago. But unlike China (and Indonesia) which have volatile woodchip import demands, it has been a steadier woodchip importer, Will this continue?

3. Recent expansions and under-construction pulp mills in Indonesia have already resulted in a big increase in demand for imported woodchip-s in 2024. Will import demand soar in/past 2025?

4. India has also been the poster child of a “start - stop - start” woodchip importing country. After the last surge in imports which ceased around 2019, a tiny resurgence occurred in late 2023 - and a much larger import demand in 2024. Where to from here in 2025 and beyond?

5. The giant Vietnamese export volume hit another peak in 2024. Just how high can Vietnam export volumes go?

6. Australian hardwood exports in 2024 hit another low point – way lower than suppliers had predicted in early 2024. Can we expect suppliers to react by converting eucalyptus pulpwood plantations to pine sawlog crops (for timber and carbon), and/or seek other end-uses?

7. Lower demand for Chile *E. globulus* woodchips, a new increasing demand from Chilean domestic pulp companies; and a wholesale switch to almost all *E. nitens* woodchip exports has meant an export volume low in 2024. Will exports reduce further in 2025?

8. Lower log and woodchip demand significantly reduced 2024 exports from Brazil, Uruguay and Mozambique to the Iberian Peninsula. Will demand recover in 2025?

9. Increasing demand for biomass woodchips to feed biomass power stations in Japan (and some other reasons) has apparently stretched domestic Japanese supplies. Will import top-up supplies be enough in 2025?

10. In early 2025 all eyes are on the Ukraine conflict and a possible resolution. Will the international and intra-Europe woodchip trade be impacted if “peace breaks out” in Ukraine in 2025?

About the Authors:

Mr. Dennis Neilson is a Director of the New Zealand based international forest industry advisory and publishing firm, DANA (NZ) Limited. Dennis was for some years a Director of a Japan – New Zealand JV woodchip Export Company. He has co-written 29 annual editions of the International Woodchip Trade Review published by Fast Markets RISI and now by DANA. He has co-organised seven International Woodchip Trade Conferences and several other international conferences and Field Trips around the world.

Mr. Gavin Hao is a Director of the China-based consulting, information and trading firm Gingko Consulting. He lives in Shanghai, China. After working for Stora Enso and Poyry Oy, also in China, Gavin was the RISI China forestry, wood products and wood trade specialist consultant for 10 years until 2019, when he formed his own company. Gavin has co-authored 14 editions of the Woodchip Review.

ORDER FORM

2025 International Woodchip & Biomass Trade Review

POSTAL ADDRESS	TELEPHONE	E-MAIL ADDRESS
DANA (NZ) Limited, 3 Goodwin Avenue, Rotorua, New Zealand 3040	+64 21 976 598	admin@dana.co.nz

2025 International Woodchip & Biomass Trade Review	QUANTITY	TOTAL US$
PDF Version US$ 5,250 [Discounted to US$ 4,250 for buyers of the 2024 Review]		
Excel data for all Tables and Charts: An additional US$ 450		
Separate 60-90 minute ZOOM/TEAMS presentation with co-authors $1,450		
Total		

Subscribers who purchase both the Review and the Excel files will receive free monthly 2025 YTD updates of chip export–import data by country.

ORDERING & PAYMENT OPTIONS

Orders and payment can be made directly online at https://dana.co.nz/publications

Click on the BUY NOW Button, complete your details and confirm. Your confirmation will appear on screen and you will be directed to the secure PayPal site where you will be able to pay using any credit card (PayPal account not required) simply complete details following the prompts on screen. 4.2% Credit Card Processing Fees will be added to your payment.

DANA will receive confirmation of your order and payment and the Review will be dispatched along with your invoice / receipt.

If you would prefer to receive an invoice and make payment to DANA USD Bank Account please complete your order above and details below and scan and send to admin@dana.co.nz

SUBSCRIBER DETAILS

Full Name:
Position:
Company:
Address:
Address:
Country:
Telephone: + [country code]
E-Mail [Clear address please]: