

# 构建可持续的供应链：中国林产工业的经验借鉴

## Building Supply Chain for a Sustainable Future: Perspectives & Lessons Learned from the Chinese Forest Sector

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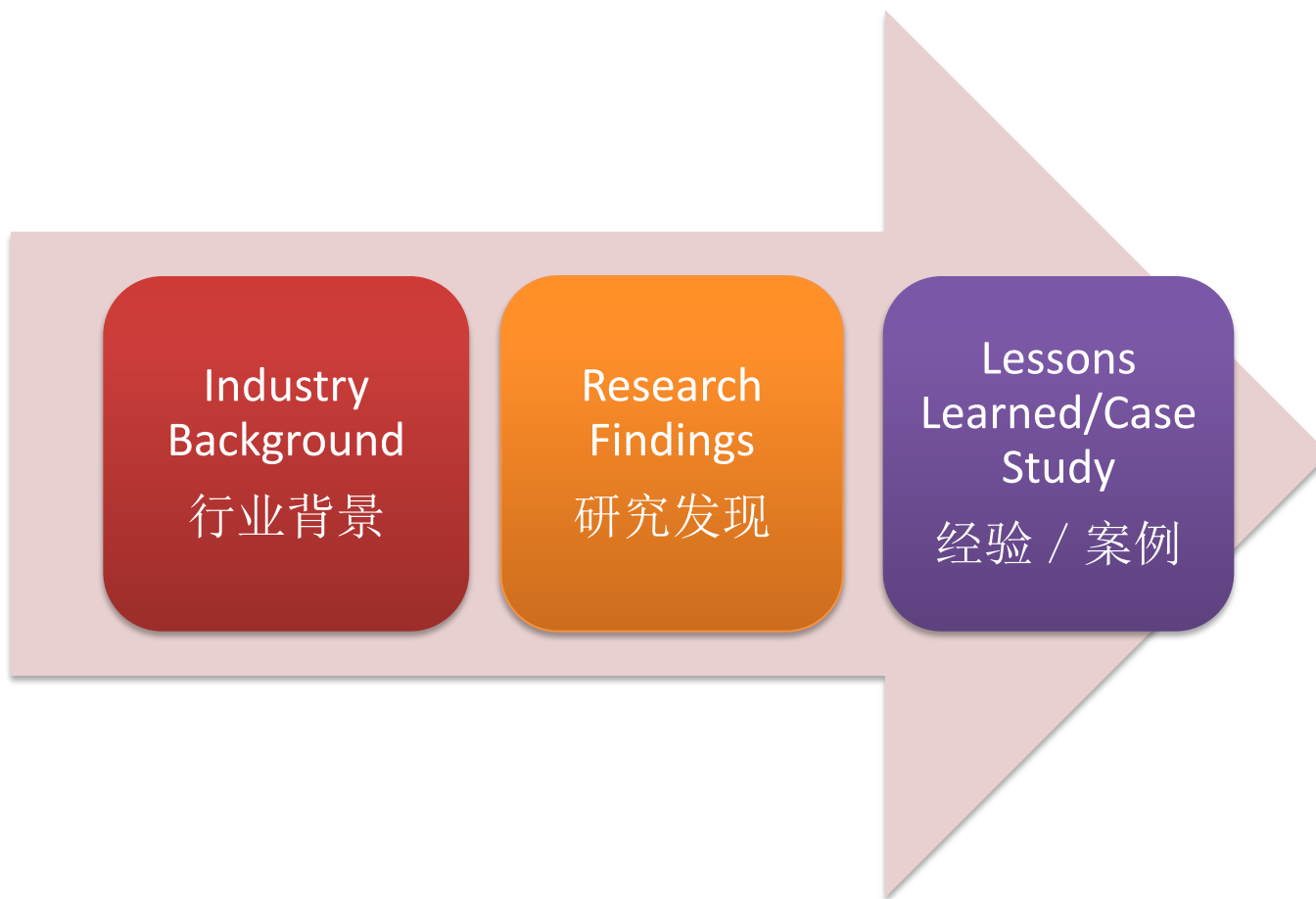
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**Dr. Eric Hansen, Oregon State University**

Jeff Morrell 教授，俄勒冈州立大学

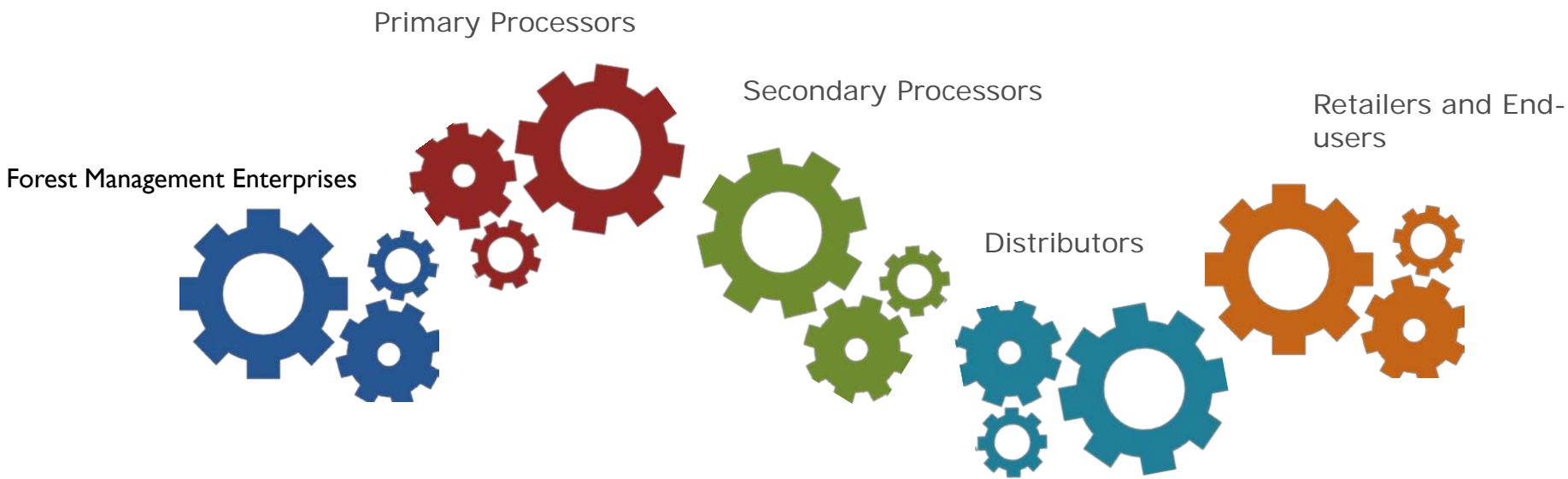
**Dr. Jeff Morrell, Oregon State University**

# Content 内容提要



# Supply Chain: Comprehensive System connecting forests & consumers

供应链：链接森林和消费者的综合体系



producers / processors    buyers / exporters / importers    distributors / brands / retailers / industry groups    consumers

Land use practices

Business practices

Consumer behavior

土地使用方式

商业实践

消费者行为

# Different Paths to Sustainability

## 通向可持续发展的不同途径

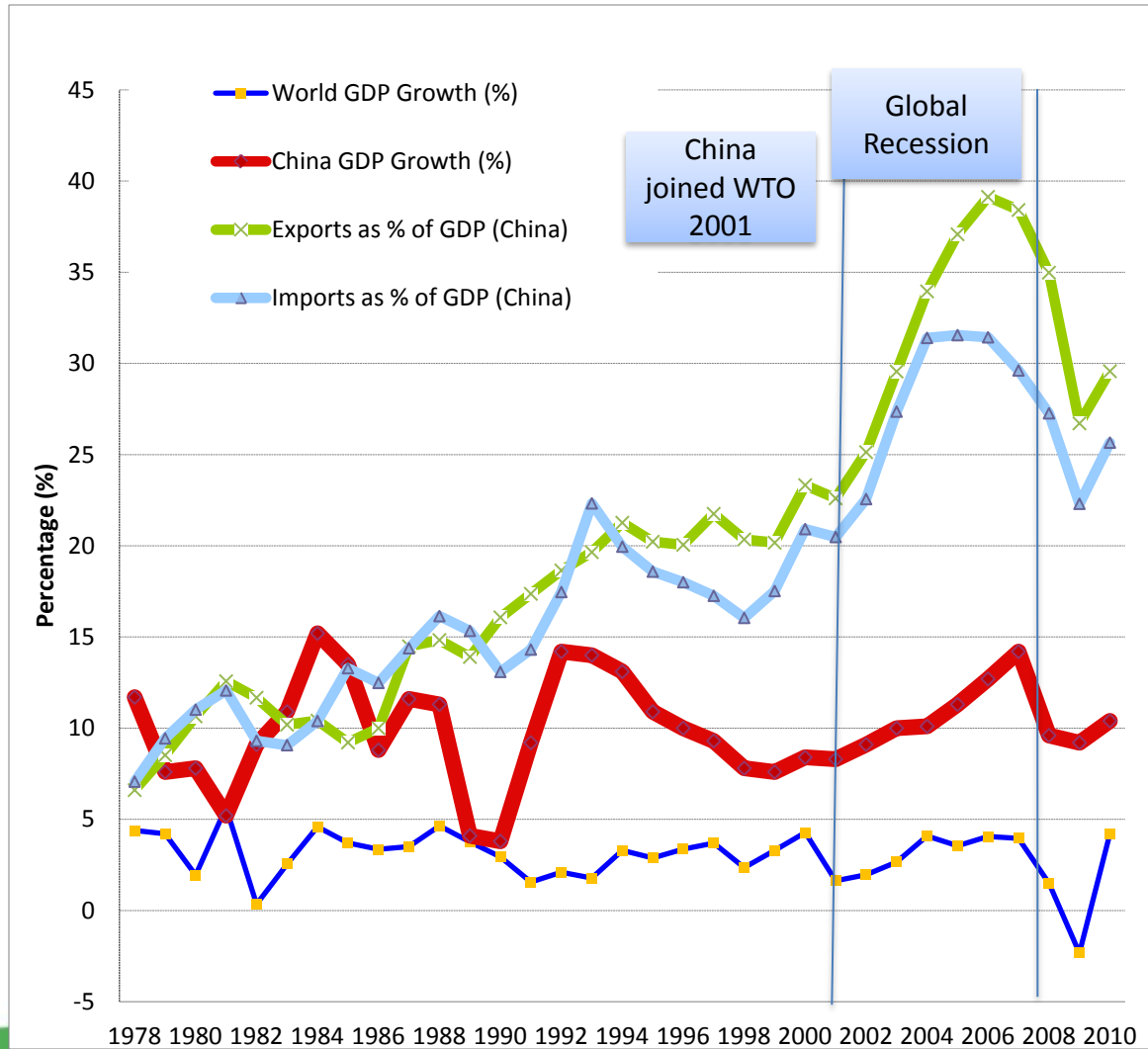
**The fundamental  
difference**  
根本区别

Responsible  
负责任

Irresponsible  
不负责任

# FP Industry in Transition Calls for Sustainability

## 可持续是转型中的林产工业的需要

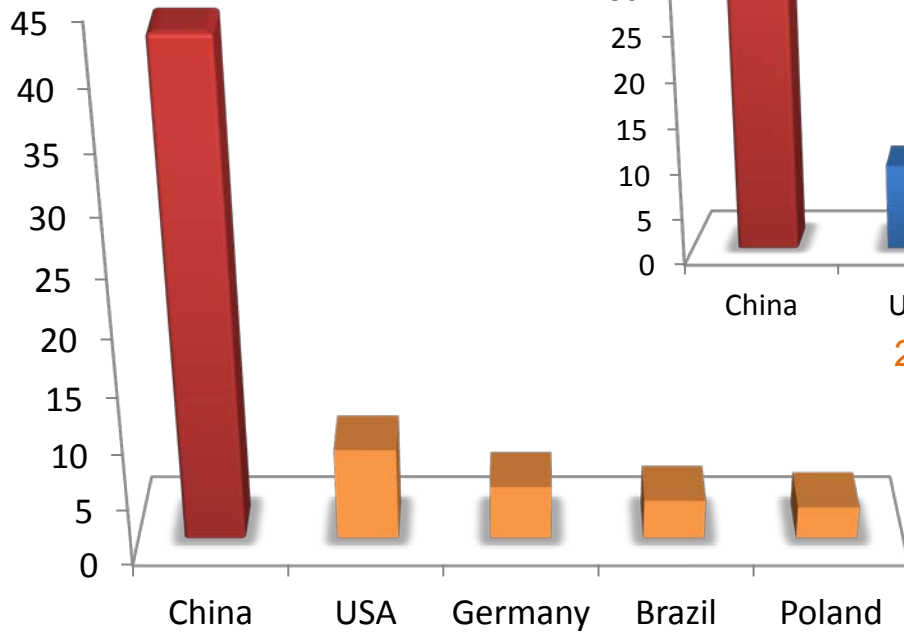


Data Source: World Bank 2010

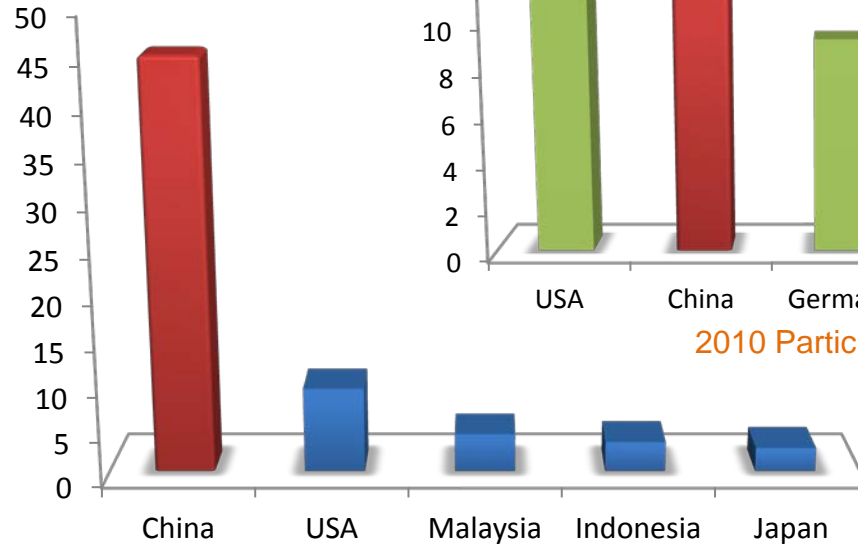


# Wood Panels Production

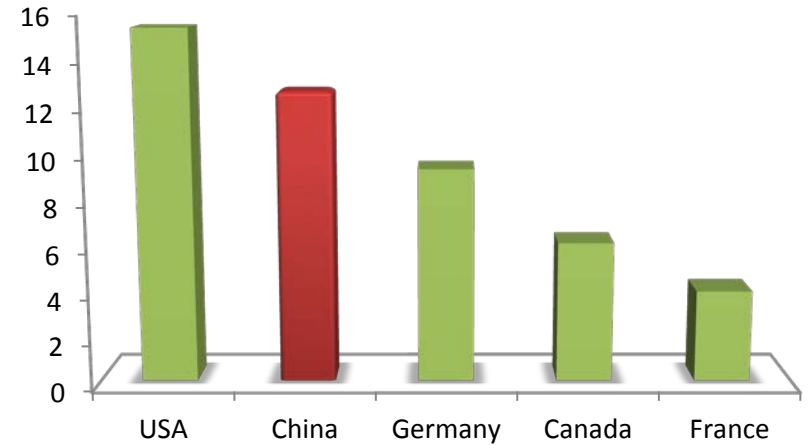
## 人造板产量



2010 Plywood Production #1



2010 Fiberboard Production #1

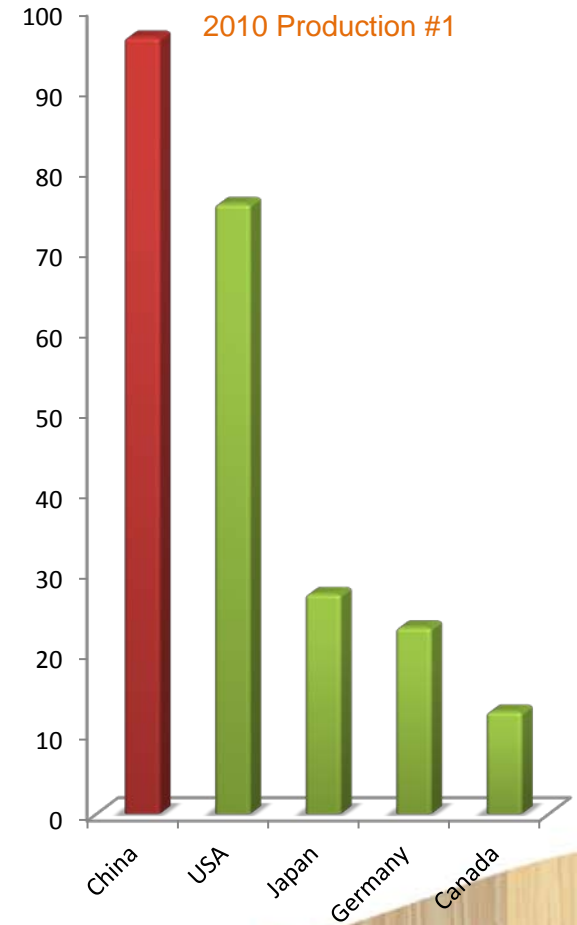
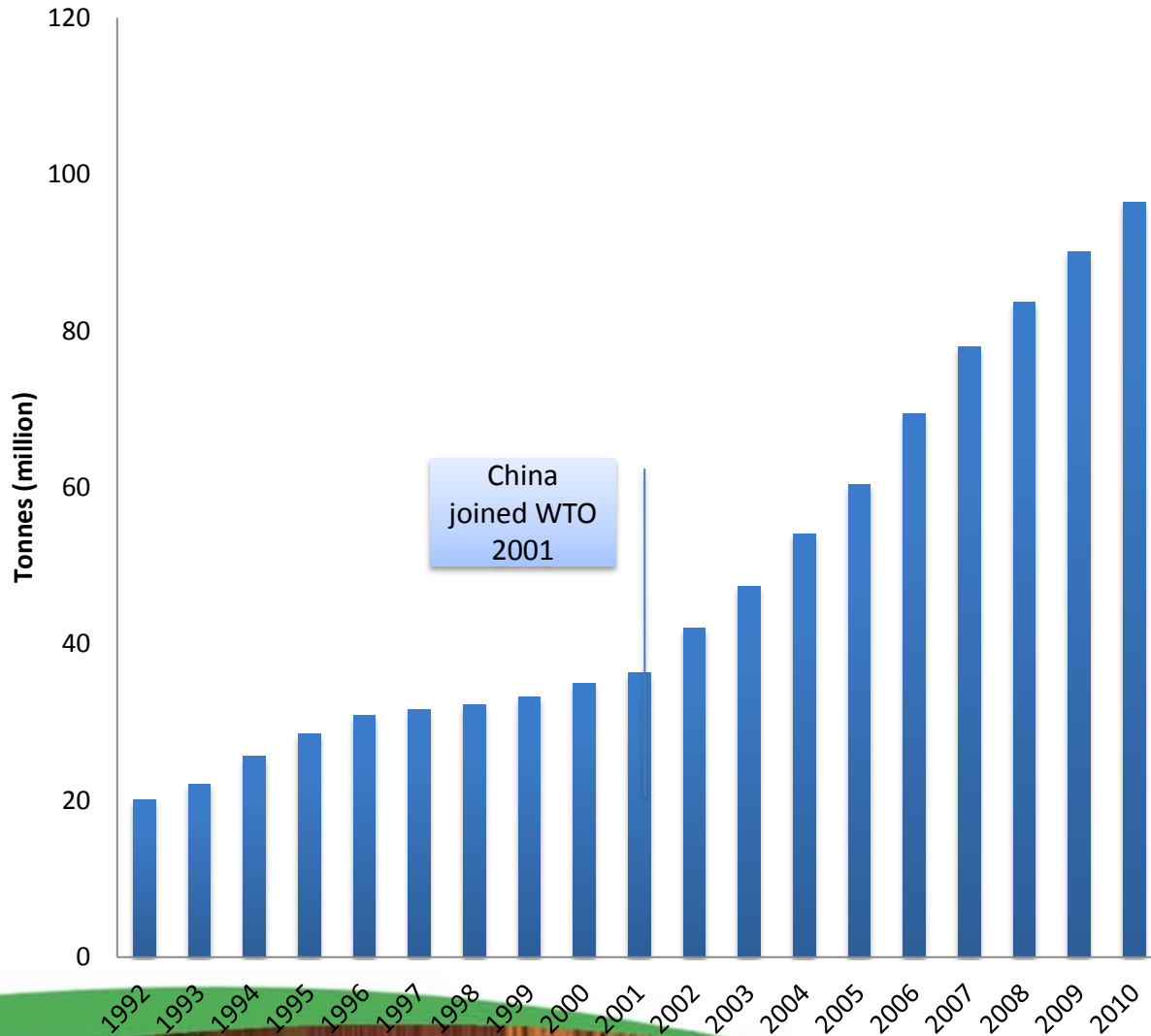


2010 Particleboard Production #2

Unit: million M3

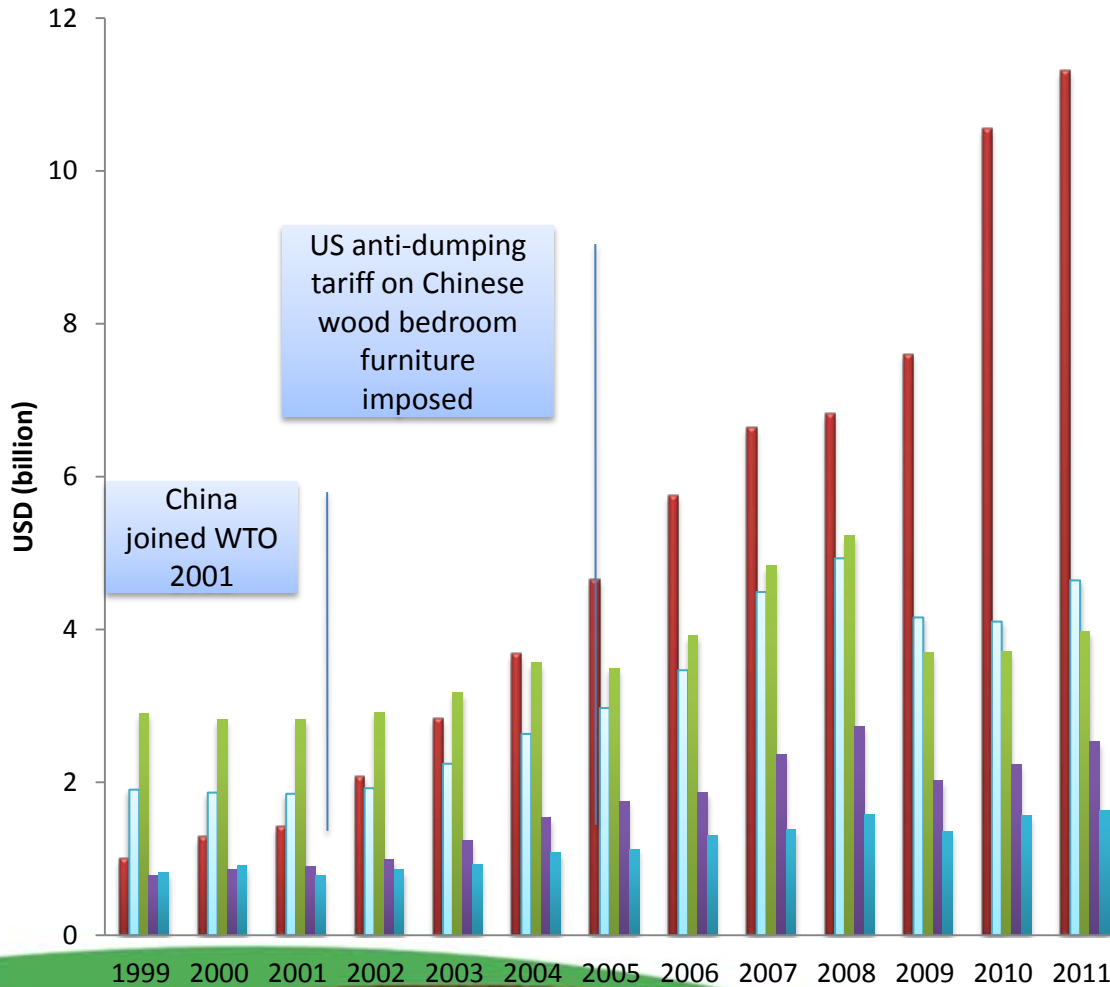
# Paper & Paperboard Production

## 纸与纸板产量



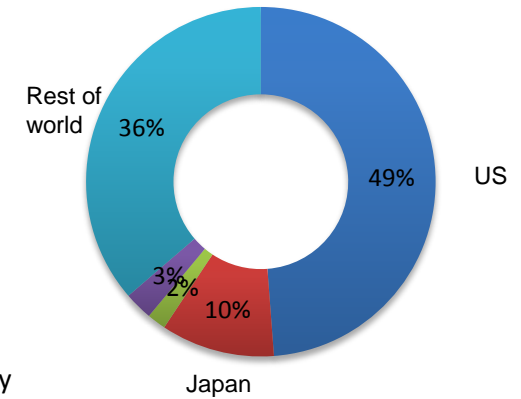
# Wood Furniture Exports

## 木家具出口

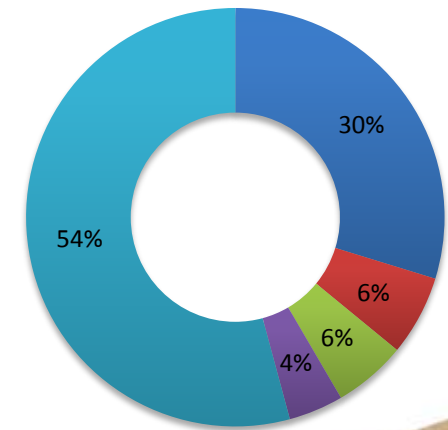


market share

1999



2011

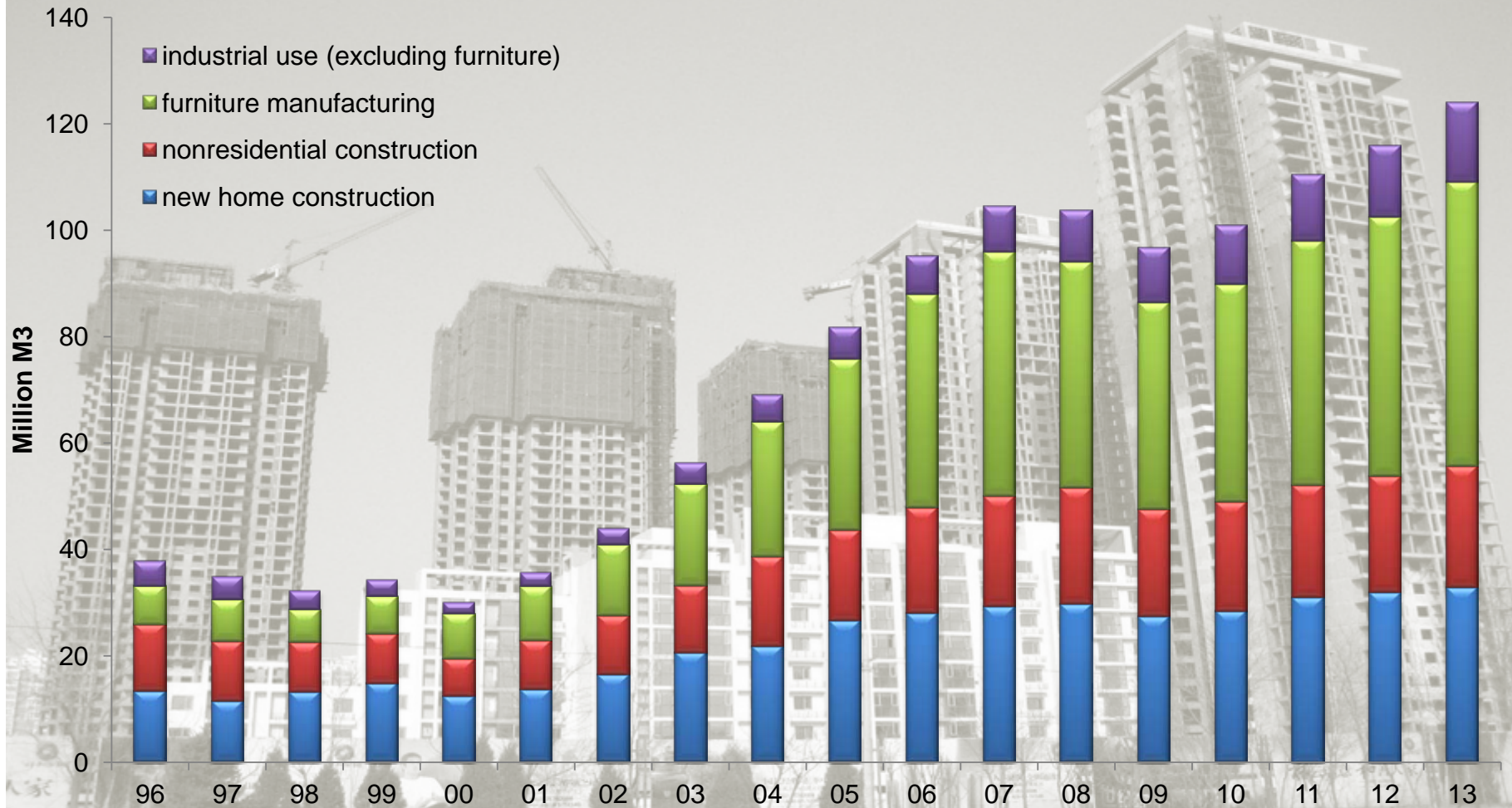


USA Japan Singapore U.K. rest of the world



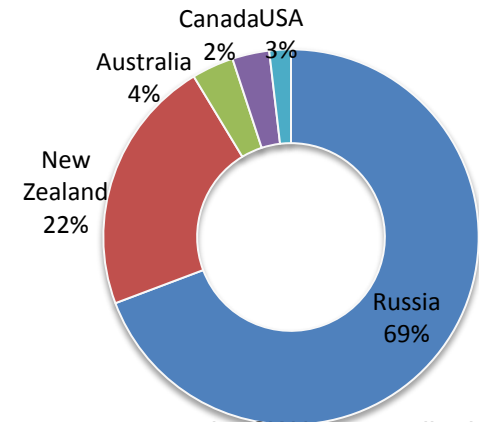
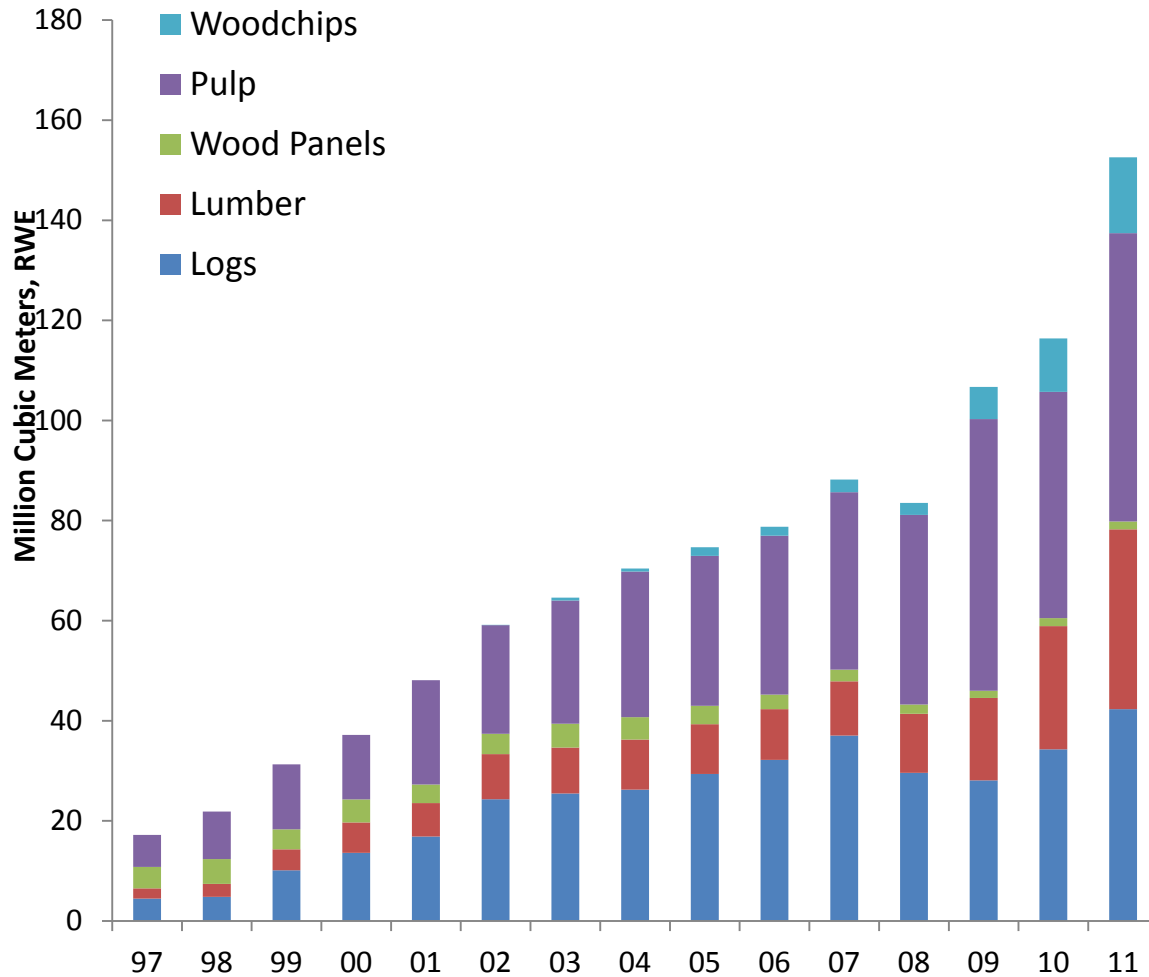
# Domestic Wood Consumption

## 国内木材消费

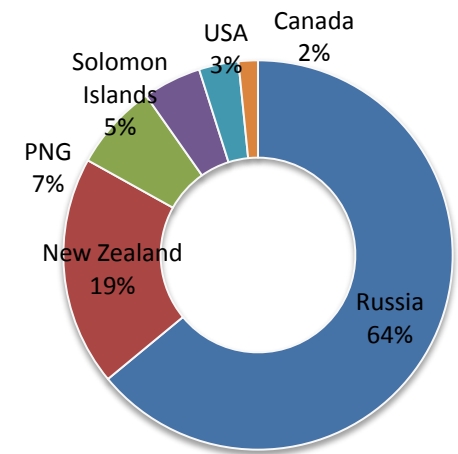


# Challenge: Growing timber deficit

## 挑战：不断增长的木材缺口



2011 major SW logs supplier by quantity (total 20.3 million M3)



2011 major SW+HW logs supplier by quantity (total 28.1 million M3)

# Challenge: Changing Regulatory Environment

## 挑战：变化的法规环境

### International Trade Laws

EU FLEGT Action Plan approved 03', which is being implemented through VPAs

New EU Timber Regulation expected to become effective by March 2013

### Bilateral Agreements

Japan's "Goho-Wood" Policy issued 06'

US Lacey Act amended 08', Phase IV implemented in 10'

Australia to issue Timber Trade Policy soon

China-Indonesia MOU signed 02'

China-Myanmar MOU signed 06'

China-US MOU signed 08'

China-EU BCM on FLEGT signed 09'

China's own VPA in process

PEFC entered China 07' -CoC only

PEFC endorse CFCC?

FSC entered China 98', with support from WWF and other NGOs, China working group established to develop national standards

CNCA new policy issued. FSC is restricted to exports until it becomes local standards approved by gov

China joined Montreal Process in 2000

Standards development led by SFA. industry standard released 07'

 CFCC Established 07'

China joined PEFC 11'

CFCC certification body ZTCC accredited by CNCA 12',

National forest certification standards

late1990s-2000

2001

2002-2010

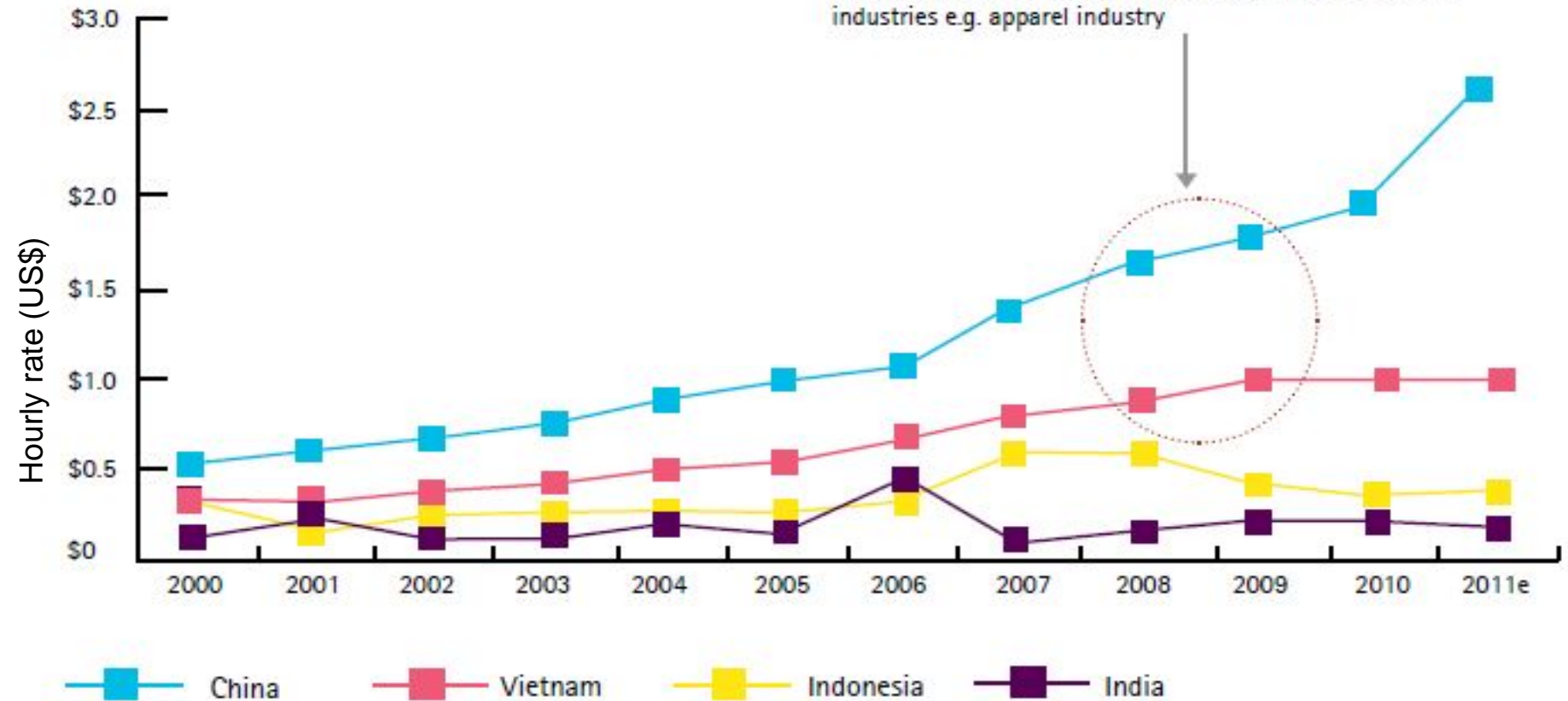
2011-2012

2013...

# Challenge: Rising Competition from Low Cost Countries

## 挑战：与低成本国家之间的竞争加剧

The wage gap between China and Vietnam has been getting wider since 2007. However, it is important to note that the wage differential may be lesser in labor intensive industries e.g. apparel industry



# Data: Managerial Interviews

## 数据：采访高级管理人员

	<b>Organizations Interviewed</b> 受访机构	
	<b>Industry Association</b> 行业协会	China Wood Products and Timber Distribution Association;
	<b>International Development Agency</b> 国际发展机构	USAID's Responsible Asia Forestry and Trade (RAFT) Program;
	<b>NGOs</b> 非政府组织	The Forest Trust (TFT); The Nature Conservancy (TNC); Rainforest Alliance; WWF/GFTN-China;
	<b>Private Companies</b> 私营企业	B&Q; China Wood International; Haworth; IKEA;
	<b>Research Institutes</b> 研究机构	European Forest Institute's FLEGT Asia Program; Northland College; Yale University;

# A **sustainable** supply chain can bring about 可持续供应链的可以带来

- **Reliable supply:** securing access to sustainable raw material sources
- **Legal compliance:** international / domestic trade regulations (FLEGT, Lacey Act...)
- **Enhanced reputation:** strengthening bond with customers, staff and shareholders
- **Economic benefits:** finding unexpected efficiency gains in the supply chain
- **Better buyer-supplier relationship:** accountability and trust
- **Social and environmental benefits**
- ...



# Enabling factors of sustainable supply chain

## 可持续供应链的促成因素



Lessons Learned: strong commitment from both buyers and suppliers  
经验分享：买家和供应商的大力支持



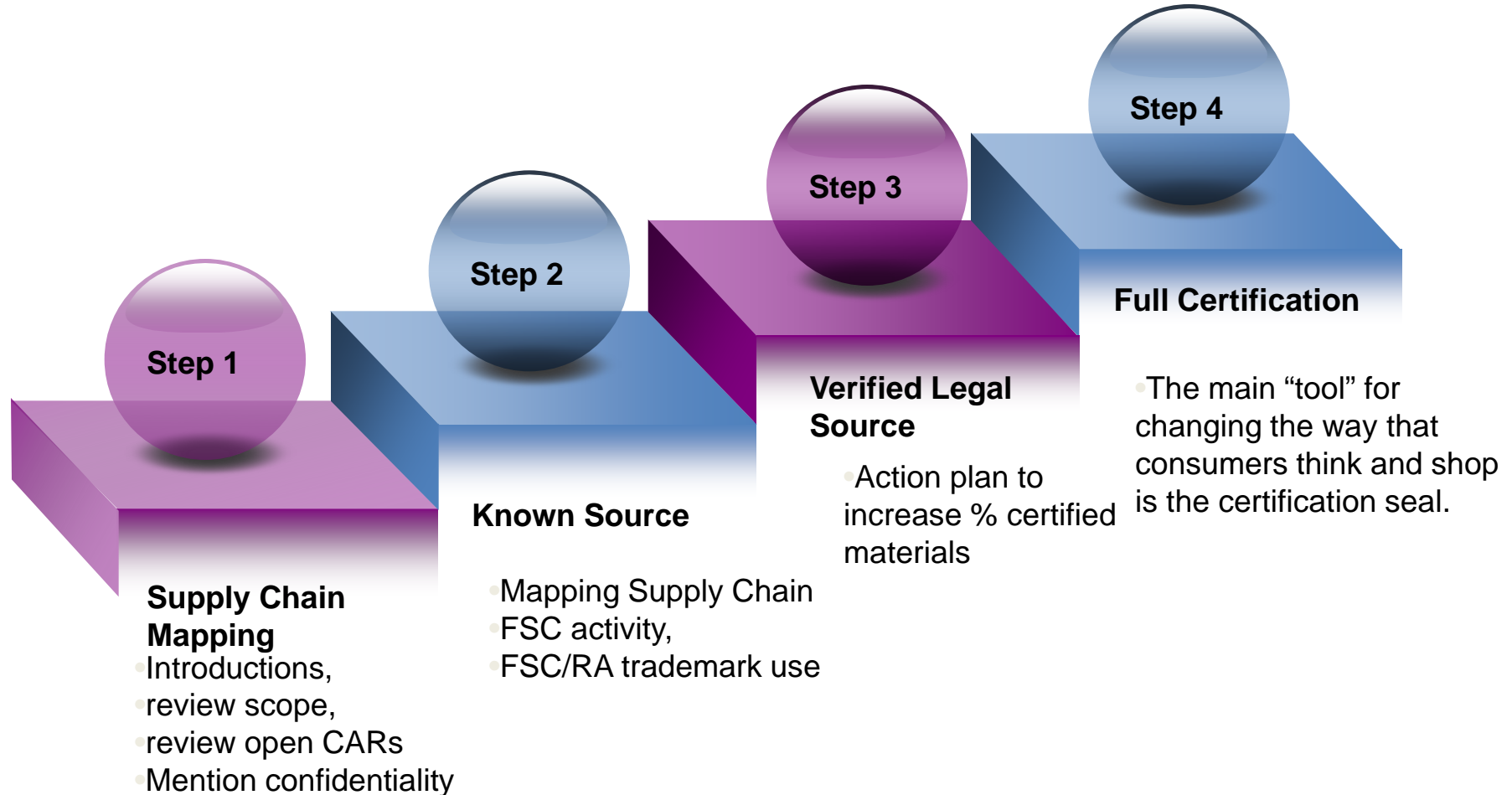
Kimberly-Clark





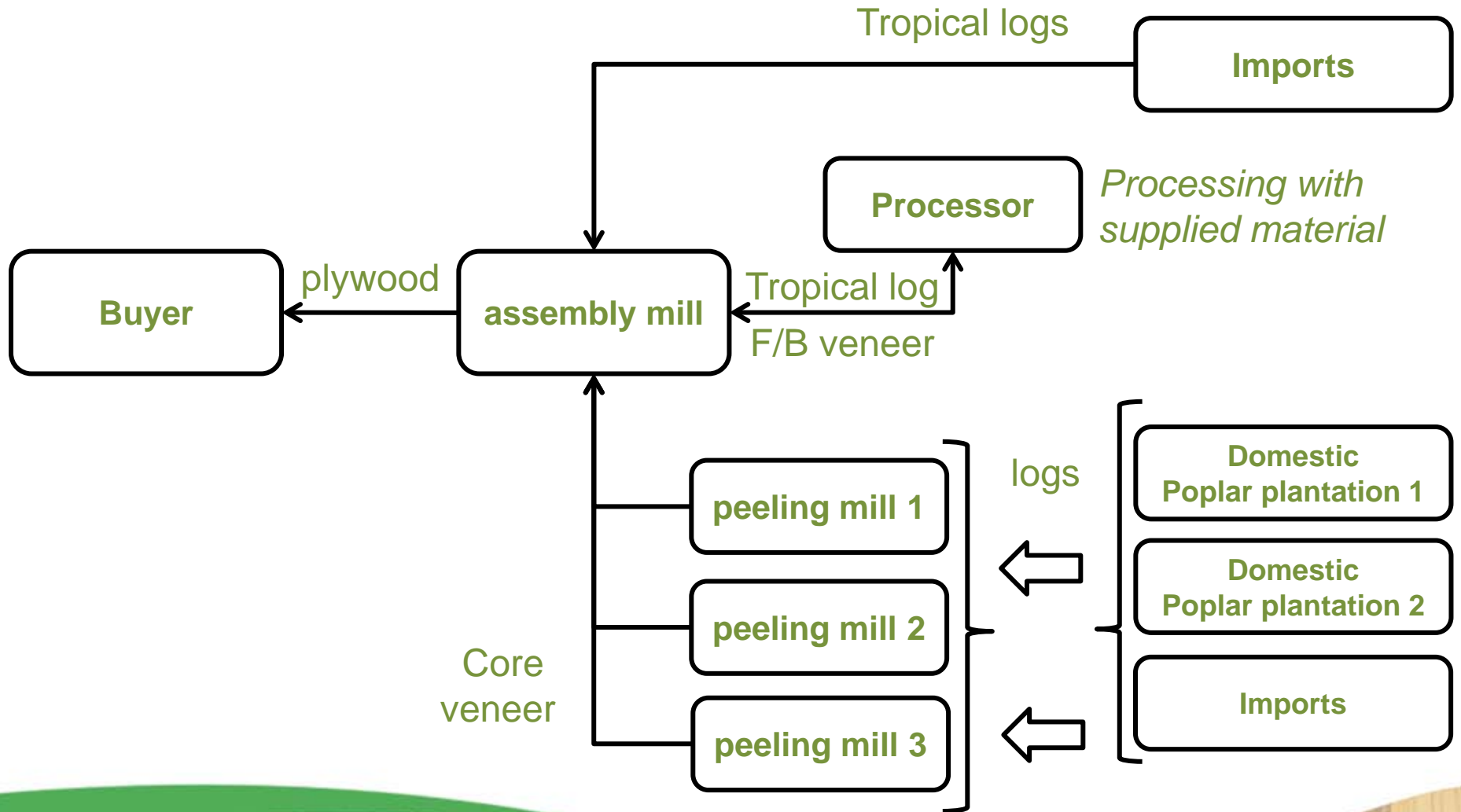
# Lessons Learned: Outsourcing Supply Chain Risk Management to **Credible** Third-Party Certification

经验分享：将供应链风险管理外包给**可信的**第三方认证



# Case study: plywood supply chain

## 案例分析：胶合板供应链



# Plywood Assembly Mill

## 胶合板筛选组坯车间



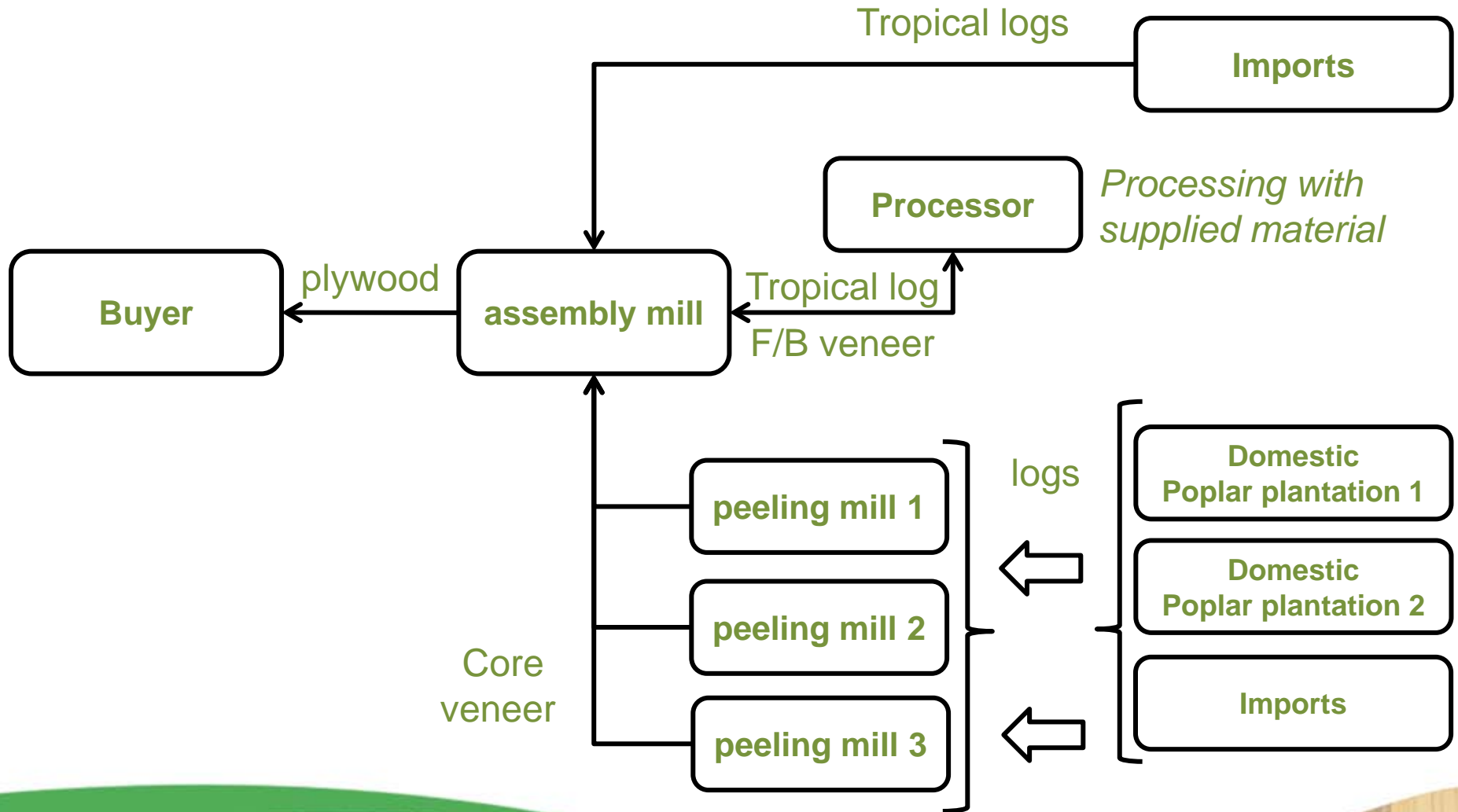
# Plywood Industry Buyer

## 胶合板企业用户



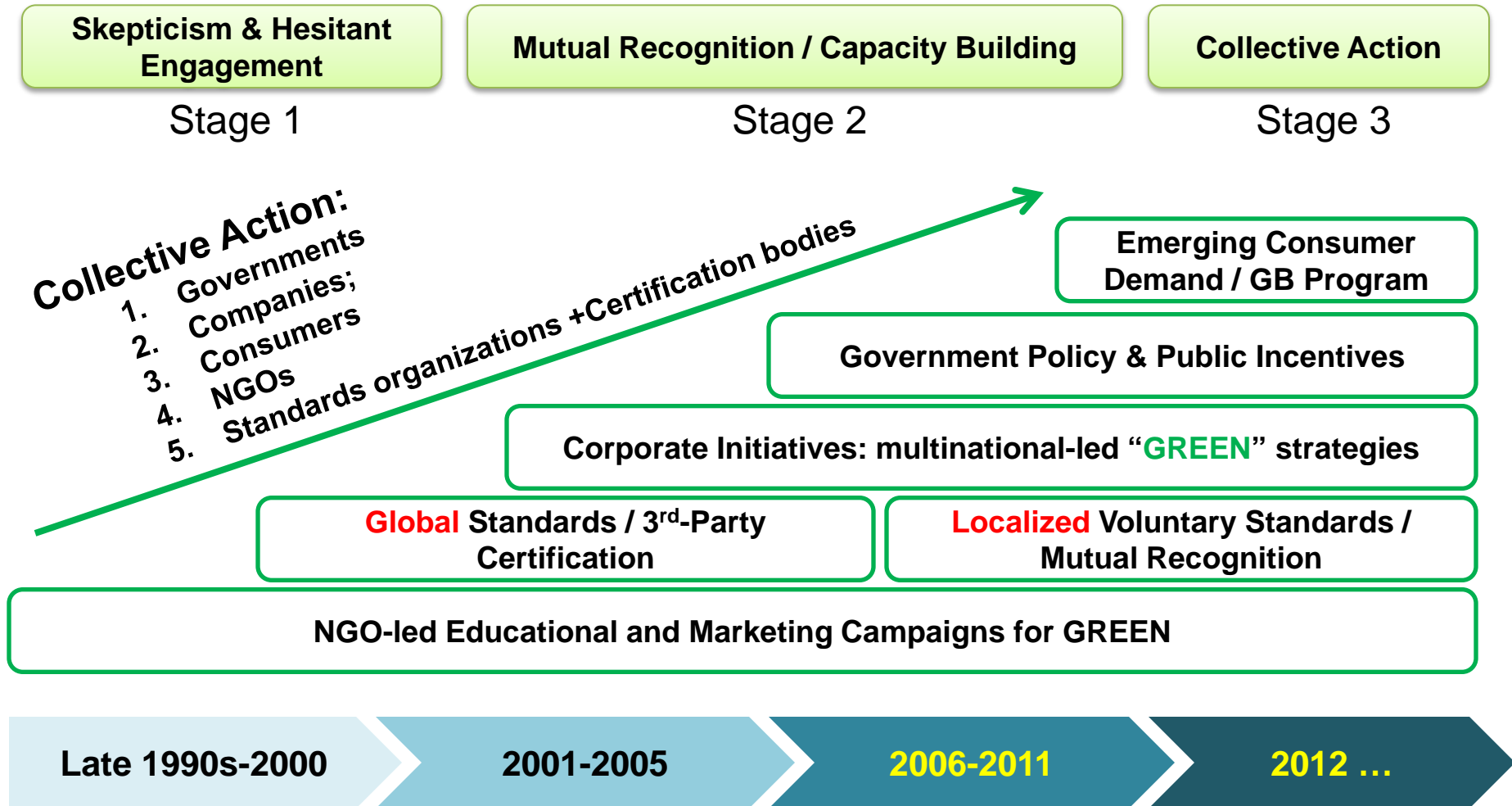
# Case study: plywood supply chain

## 案例分析：胶合板供应链



# Toward a Sustainable Future: Collective Actions

## 可持续未来的发展模式：多方协作



# Thank you



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