PROCESSING AND EXPORTING WOOD AND WOOD PRODUCTS IN VIETNAM

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SUMMARY
In the past two decades, from 2000 to 2020, the export value of wood and wood products of Vietnam has increased from 219 million US dollars to 12.3 billion US dollars, which can be seen as a breakthrough development. However, not stopping there, the Vietnamese Government has assigned even higher targets for the wood industry in the coming years, which is 20 billion US dollars of export value in 2025. However, the wood and wood product processing and exporting of Vietnam still faces a number of shortcomings. By applying discriptive and comparative statistical methods, the article analyses the current situation of processing and exporting wood and wood products of Vietnam according to three stages: supply of raw materials, wood and wood product production, and wood and wood product export. Data mainly used in the article are extracted from officially domestic and international sources, such as data reported by the General Statistic Office, ITTO and FAO. Wood and wood products in this article includes roundwood, sawnwood, veneer, plywood (under HS44 group) and wooden furniture. At the same time, the achievements and challenges of the wood and wood product processing industry at each stage are also indicated. From there, some suggestions are made to help the wood and wood product industry in Vietnam overcome challenges and promote sustainable growth in the future.
Keywords: export, wood and wood products, wood and wood product processing industry, wood materials.

1. INTRODUCTION

In recent years, the development of the wood processing industry in Vietnam has had many positive points. In 2020, despite many negative impacts of the Covid-19 epidemic, the wood processing industries of Vietnam have made efforts to overcome difficulties, promote exports and expand markets to the United States, Japan, Korea and the Europe. However, the processing and export of Vietnamese wood products has many limitations such as dependence on foreign raw materials, weak design, and many bottlenecks in the operation of the wood value chain. Therefore, it is necessary to study the current status of production, processing and export of Vietnam's wood and wood products (W&WPs).

The main objective of the article is to analyse the actual status of the production, processing and export of W&WPs in Vietnam. At the same time, the strengths and weaknesses of wood products processing and export of Vietnam are clarified and suggestions for Vietnam are also pointed out to be able to develop the production and export of W&WPs of Vietnam in the coming time.

2. RESEARCH METHODOLOGY

2.1. Research questions

- What is the current situation of W&WPs processing and export in Vietnam?
- What are the trengths and weaknessess of W&WPs processing and export of Vietnam?
- What are main suggestions to improve the status of producing and exporting W&WPs of Vietnam?

2.2. Data sources

The data used in the study are pre-existing data, from the following sources:

- Data on forest area, forest classification, forest volume, number of employees and enterprises operating in the processing industry are extracted from the General Statistics Office of Vietnam (GSO).
- Data on production volume and value, export and import volume and value are extracted from international official data sources such as:

+ ITC TRADE MAP: www.trademap.org;

+ Database of the International Tropical Timber Organization (ITTO): https://www.itto.int

+ Database of the Food and Agriculture Organization of the United Nations (FAOSTAT).

2.3. Analysis Techniques

- ***Descriptive statistical method***: This method is used to describe the basic characteristics of the collected data related to the development status of the wood processing industry in Vietnam through different methods of collection. The indicators used in the analysis include: average number, proportion (weight) and average annual growth rate (AAGR). AAGR is the average increase in the value of an investment or cash flow over a one-year period. It is calculated by averaging a series of growth rates.

- ***Comparative statistical method:*** This method is used to compare the indicators of different research groups. The indicators used include qualitative and quantitative changes. Figures and schedules are applied to desbribe the comparative change among research groups.

- ***Methods of synthesis and analysis:*** Used throughout the course of the project. Synthesize all collected data, conduct analysis, evaluate the development of the wood processing industry and the current status of the value chain of W&WPs.

2.4. Research scope

There are thousands types of W&WPs. In this article, the authors concentrate on the several processed wood products under HS 44 group, such as: industrial roundwood, sawnwood, veneer and plywood (under the classification of FAO, 2013). About high value added products, only wooden furniture is taken into account. ***In this article, wood and wood products (W&WPs) contain wood and processed wood products (under HS44) and wooden furniture.***

3. RESULT AND DISCUSSION

3.1. The current status of W&WPs processing and export of Vietnam

3.1.1. Wood material sources

In terms of origin, raw materials for Vietnam's wood processing industry mainly come from two basic sources: domestic wood materials and imported materials.

a. *Domestic wood materials*: According to the Ministry of Agriculture and Rural Development of Vietnam (MARD), in 2019, the total forest area is 14,609,220 hectares, including 10,292,434 hectares of natural forests and 4,316,786 hectares of planted forests. The total area of natural forest as production forest (allowed for exploitation) is about 4 million ha. The area of concentrated plantations (including protection plantations, special-use forests, and production forests) tends to increase over the years.

According to the Government's decision, natural forests were closed since 2017. Therefore, the reserves of raw materials from natural forests are not taken into account, and the domestic source of wood materials is currently only dependent on plantation forest. Besides, domestic raw materials supply for wood processing, although the output of planted forest wood increases every year, is not qualified to process wooden furniture for export. Most of the planted forest wood harvested is acacia, melaleuca, eucalyptus... with small diameter and mainly used to produce wood chips and artificial wood planks. Therefore, the domestic supply of raw materials for furniture production is mostly provided from domestic wood planks, home garden trees, liquidated rubber wood.

The total volume of industrial roundwood produced in Vietnam has been increased over the years and is represented in Figure 1. This is the result of policies that encourage and support afforestation implemented in Vietnam. At the same time, the increasing amount of domestically harvested materials is also the reason why Vietnam's exports of W&WPs have increased sharply in recent years.

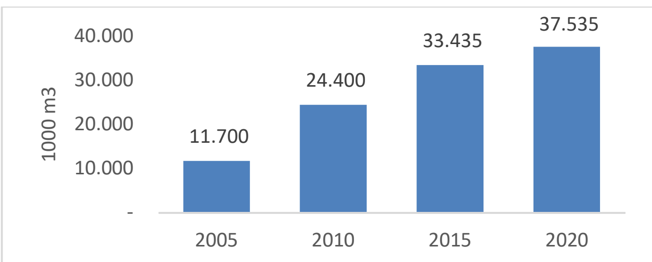

Figure 1. Production volume of industrial roundwood in Vietnam (2005 – 2020)

(Source: Data extracted from ITTO)

For the wooden furniture industry, the total current demand for timber is about 9 million m^3/year, while the current domestic supply capacity is about 3.2 million m^3/year (mainly wood from liquidated rubber forests), the rest is imported from countries around the world.

b. Imported wood materials: The source of imported wood materials plays an extremely important role in the wood processing industry's production, it makes up for the shortage of domestic raw materials supplie. Every year, Vietnam imports a large amount of wood materials from more than 110 countries around the world with many different types.

Among the three groups of imported wood materials including logs, sawnwood and wooden boards of all kinds, logs and sawnwood account for a significant proportion, ranging from 75 - 80% of the total import value of Vietnam.

Table 1. Import value of wood and articles of wood (under HS44) of Vietnam, 2016 - 2020

Year	Idustrial round wood		Sawnwood		Veneer		Plywood		Total value (HS 44) ($1000)
	Value ($1000)	Propor-tion (%)	Value ($1000)	Propor-tion (%)	Value ($1000)	Propor-tion (%)	Value ($1000)	Propor-tion (%)	
2016	529,514	31.05	797,212	46.74	69,917	4.10	176,729	10.36	1,705,469
2017	674,937	34.00	1,055,828	53.19	95,337	4.80	221,781	11.17	1,985,079
2018	710,455	38.05	1,168,058	62.55	119,749	6.41	274,790	14.72	1,867,361
2019	721,754	37.96	1,438,703	75.67	172,968	9.10	267,074	14.05	1,901,253
2020	600,632	34.54	1,336,855	76.89	200,670	11.54	270,773	15.57	1,738,768
Average	**647,458**	**35.20**	**1,159,331**	**63.02**	**131,728**	**7.16**	**242,229**	**13.17**	**1,839,586**
AAGR (%)	**4.38**	**-**	**14.79**	**-**	**30.61**	**-**	**11.99**	**-**	**0.93**

(Source: Data extracted from ITTO and Trademap)

Round wood is accounting for 31 - 38% of the total turnover of imported wood materials and includes two main groups. The first group is timber from tropical natural forests imported from the Mekong sub-region (mainly Laos) and Africa. These areas are considered high risk in terms of legal status of wood origin. The second group is timber from plantations or temperate forests originating in Europe and North America, with a low risk of legality of wood origin. In recent years, the trend of importing round wood from the first group tends to decrease. Wood imported from the second group has a stable import volume and tends to increase gradually. Sawn timber, accounting for 46 - 77% of the total value of imported wood materials, also includes two main groups similar to those of roundwood.

However, for both logs and sawn timber, although there is a shift in the composition of imported wood materials from sources considered high risk to sources with lower risk, the source with high legal risk still accounts for a large proportion in the structure of importing wood materials.

3.1.2. Wood processing

a. Number of wood processing units: According to data from the Vietnam Timber and Forest Products Association (VIFORES), there were 2,392 enterprises exporting W&WPs in 2019, including 1,780 domestic enterprises (74.5%) and 612 FDI enterprises (25.5%). In addition to the enterprises mentioned above, there are many household businesses and micro-enterprises across the country that are involved in processing and trading in timber and other forest products. The majority of household businesses produce for the domestic market or for local needs, but there are also some households involved in the supply chain of timber and wood products and the export market, which includes households business in some craft villages.

The change in the number of wood processing enterprises in Vietnam is represented in Figure 3. In 2000, the number of wood processing enterprises were only 896 in the whole country. This number increased to 5,560 enterprises in 2019, which is an increase of 6.2 times compared to 2000.

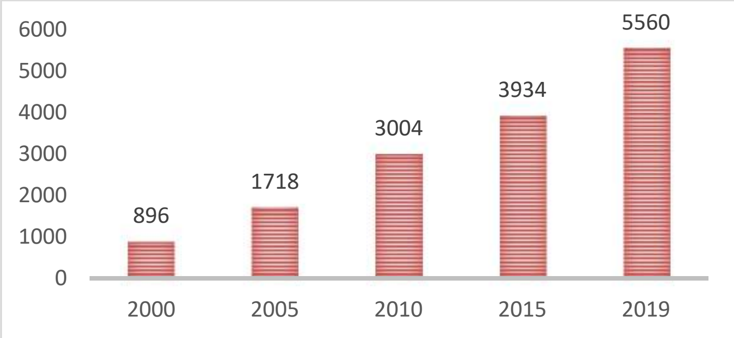

Figure 2. Number of wood processing enterprises in Vietnam, from 2000 to 2019
(Source: Data are extracted form several sourcess)

The majority of enterprises are concentrated in the Central region (Binh Dinh) and the South with more than 80% of the number of enterprises in the country. In which, there are 2,352 enterprises in the South, accounting for 59.78% of the total number of enterprises in the country and concentrating mainly in Dong Nai, Binh Duong and Ho Chi Minh City. The country currently has 4 wood processing industrial parks, three of them are concentrated in the South (Ho Chi Minh City, Dong Nai, Binh Duong) and one in Binh Dinh (VIFORES, 2015).

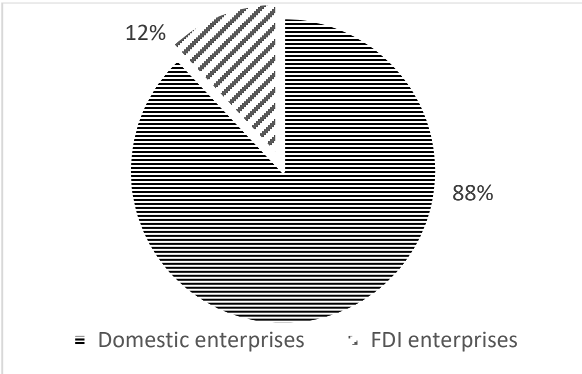

Figure 3. Struture of wood processing firms in Vietnam in 2019
(Source: Forestry General Department, 2019)

Up to now, the W&WP processing industry has formed a nationwide network, with many economic sectors participating and there is a change in the the roles of economic sectors. The private sector has strongly participated and played a leading role in processing and supplying wood products. In particular, FDI enterprises also began to participate in wood processing with the proportion of 12% of the total number of wood processing enterprises in the countryn as can be seen in Figure 3. As of 2019, there were 966 FDI enterprises in the sector, with a total investment of $6 billion. In 2019, Vietnam's wood processing industry welcomed 99 new investment projects, with total registered capital reaching $726 million, up to 48% in the number of projects and 170% in investment capital over the previous year. Estimated value of exports of furniture and wood products by FDI enterprises in 2019 was $5 billion, increasing by 25% to that of 2018, accounting for approximately 48% of Vietnam's total wood and furniture exports (Kiet Vo and Linh Nguyen, 2020).

c. *Labor in the wood processing industry:* According to the GSO, there are currently nearly 500,000 employees in the entire forestry sector including in enterprises, craft villages and business households. The proportion of women and men are about the same, which are 51% and 49% respectively (GSO, 2021). In addition to the mentioned forestry workers, there are millions labour of households planting forests and forestry across the country, mainly in rural mountainous areas.

According to GSO, in general, the labor force in the wood processing industry is gradually improving over time through vocational training programs of the Government and enterprises. However, in fact, human resources are still a big problem for the wood processing industry in terms of both unskilled labor, technical labor and management human resources. Inadequate training, unprofessional activities, unreasonable division of labor, and ineffective monitoring and management mechanisms are the current outstanding issues. Labor productivity of Vietnam in 2020, according to ILO estimates, is 7 times lower than Malaysia, 4 times that of China, 3 times that of Thailand, 2 times that of the Philippines and 26 times that of Singapore. With the advantage of abundant human resources, but a limited number of skilled and qualified workers - this is also another fact that explains the situation in which a large number of people are willing to work but businesses in the wood processing industry still lack manpower.

d. Technology and capacity of wood processing industry: According to the report of VCCI (2019), in terms of wood production capacity, wood industry enterprises can be divided into three groups as follows:

- Group of enterprises producing artificial boards (MDF, bar board, plywood...): using European processing technology with a capacity of 60,000 m^3 to 300,000 m^3 per year.

- Group of furniture processing enterprises for domestic consumption: mainly using technology from Taiwan and China with a small capacity of 1000 - 10,000 m^3 per year.

- Group of enterprises processing wooden handicrafts: mainly producing using manual technology with traditional tools such as hand sawing, chisels, and hand carving.

In general, wood processing enterprises have made some efforts in improving the technology used in processing. Many technologies have been used in processing plantation wood materials such as sawing, drying and creating artificial board products such as chipboard, veneer and plywood. The equipment is also improved to match the characteristics of the materials used. Thanks to these technologies, the rate of using planted forest wood has been increasing, and a number of large-scale artificial board processing units have also been established. However, in general, the renovation of technology and equipment for wood processing is a challenge for many of these enterprises because it requires relatively large investments, which are beyond their capabilities.

In addition to the problem of equipment and technology, another issue, that is less expensive but has a great impact, is mentioned a lot in the production cycle of small and micro-scale wood processing enterprises in Vietnam. That is the problem of organizing and arranging the production process. According to many experts, this limitation is one of the basic shortcomings that reduce the operational efficiency of Vietnamese wood enterprises, directly affecting production costs and competitiveness of Vietnamese wood enterprises.

3.1.2. Trading activities of W&WPs

According to VCCI data (2019), about 20% of the total number of enterprises participate in direct export, the remaining group either serves direct exporting enterprises or is concentrated in the domestic market.

- The direct export group contains maily the medium and large sized timber enterprises in the industry, 57% of which are FDI enterprises. This group is divided into two smaller groups, one has access to the EU and US markets and the other has access mainly to the Asian market. The former group is considered a group with stronger and more sustainable competitiveness because these markets are very promising and they can sell products at high prices. But at the same time, these market have very strict requirements on the origin of the wood used as well as product quality. The second group has more limited competitiveness and exports mostly wood chips mainly to the easier Asian market.

- The group of enterprises that do not export directly (accounting for about 80%) includes enterprises manufacturing for export enterprises and enterprises manufacturing for domestic consumption. Commercially manufacturing wooden furniture for export is a new business method that has developed strongly in recent times, when exporting enterprises directly turn to this form in order to reduce production risks (especially in labor issues, delivery time...). However, this group is weak in terms of market relations (without direct access to customers) and therefore has less competitive capacity.

- The wood processing group for domestic consumption includes enterprises processing primary products (manufacturing plywood, MDF board, laminated board...) and enterprises producing finished interior and exterior wood products (mostly furniture).

a. W&WPs export value of Vietnam: In 2020, W&WP exports reached the total value of 12,3 billion US dollars, rose to the 6th place in ecommodity export turnover of Vietnam (GSO, 2021). It can be affirmed that this is the miracle year of Vietnam's W&WPs export activities in the context of the global economic downturn and Vietnam's commodity exports face many difficulties.

Table 2. Export value of wood and processed wood products of Vietnam (HS 44), 2016 - 2020

Year	Industrial round wood		Sawnwwood		Veneer		Plywood		World's total value
	Value ($1000)	Proportion (%)	Value ($1000)	Proportion (%)	Value ($1000)	Proportion (%)	Value ($1000)	Proportion (%)	
2016	77,129	3.37	234,441	10.24	88,787	3.88	415,057	18.12	2,290,126
2017	72,910	2.96	225,828	9.17	69,213	2.81	477,174	19.37	2,463,503
2018	46,690	1.48	109,886	3.49	69,908	2.22	589,958	18.75	3,146,464
2019	18,396	0.53	104,686	3.03	76,805	2.22	790,793	22.89	3,455,426
2020	12,531	0.32	93,576	2.36	95,229	2.40	815,875	20.60	3,960,977
Average	**45,531**	**1.49**	**153,683**	**5.02**	**79,988**	**2.61**	**617,771**	**20.17**	**3,063,299**
AAGR (%)	**-33.48**	**-**	**-17.59**	**-**	**3.20**	**-**	**18.95**	**-**	**14.94**

(Source: Data extracted from ITTO and Trademap)

Regarding the group of wood and processed wood products (HS code 44), export turnover has increased steadily over the years with an average annual growth rate of 14.94% in the last 5 years thanks to the export promotion policy. In 2020, Vietnam holds the 8th position, corresponding to the proportion of 2.96% of the total export turnover of wood and articles of wood worldwide in 2020 (Trademap, 2021). Meanwhile, logs and sawn timber tend to decrease in export value in the last 5 years due to the policy of restricting the export of raw products, increasing the export of high value added products. In addition, Vietnam's logs are mainly acacia, eucalyptus... which are consumed domestically to serve the growing woodchip processing industry.

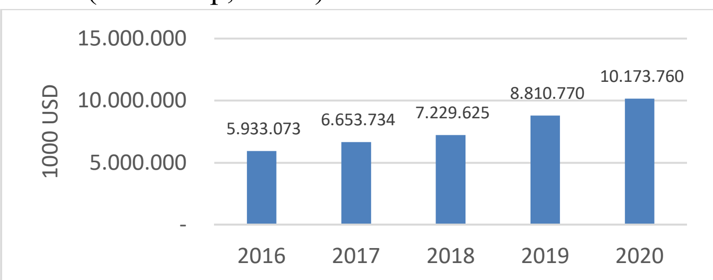

Figure 4. Vietnam's export turnover of wooden furniture, 2016 – 2020

(Source: Data extracted from ITTO)

Regarding wooden furniture, Vietnam ranks 3rd in the world in terms of export turnover of wooden chairs and 2nd in the world in terms of wooden furniture for offices and bedrooms (Trademap, 2021). As can be seen in Figure 4, the export value of Vietnam's wooden furniture in 2020 reached over 10 billion USD, 1.7 times higher than that of 2016. Vietnam rose to the 5th position in the world in terms of furniture export volume and value. Vietnam's furniture exports accounted for 14.19% of the world's total export value in 2020.

b. W&WPs export markets of Việt Nam: Vietnam's W&WPs are exported to many countries, of which the four countries with the highest turnover are the US, China, Korea and Japan. These four biggest markets are true for both wood and wood articles (HS44) and wooden furniture.

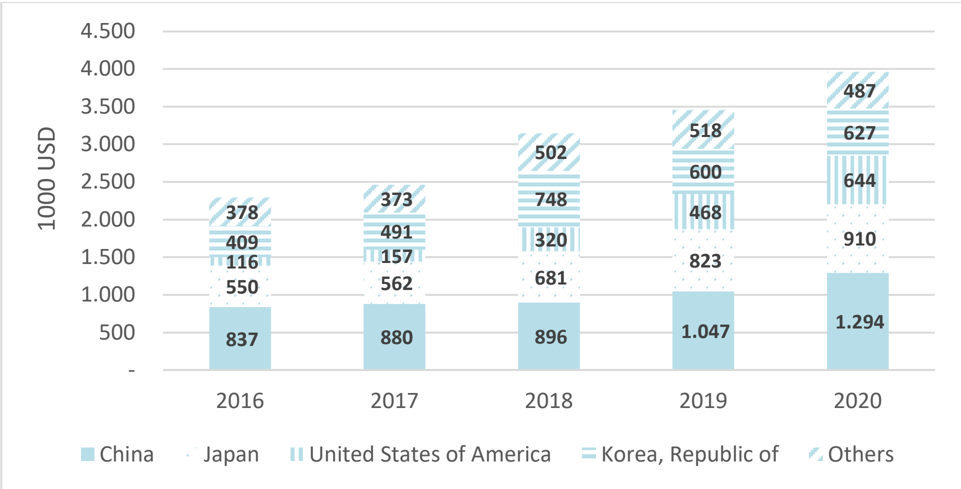

Figure 5. Vietnam's export markets of wood and wood articles (HS44), 2016 – 2020

(Source: Data extracted from Trademap)

The US is the main market contributing to Vietnam's W&WP export miracle in 2020. Despite being heavily affected by the Covid-19 pandemic, the W&WP export turnover to the US reached $7,166 billion, increasing by 34.37% compared to 2019 and accounting for 57.92% of the total export turnover of W&WPs of Vietnam. The second largest market share is Japan - accounting for 10.46% in 2020.

About wood and articles of wood (HS44), the four biggest markets, including China, Japan, the US, and Korea, account for 82% of total export value of HS44 products. China is the biggest export market of Vietnam (32.7% of export value of HS44 products) with a steady increase in the export value from 837 thousand US dollars in 2016 to 1,294 thousand US dollars in 2020. The second largest market is Japan, which account for about 23% in 2020.

c. Key export products: In the export structure of W&WPs of Vietnam, wooden furniture always accounts for a high proportion, which shows that the policy of changing export structure from exporting raw wood materials to high value-added products such as wooden furniture is very effective. The value of exported wooden furniture in 2020 was 10.1 billion US dollars, accounting for 82.9% of total exported value of W&WPs.

3.2. The achievements and challenges of W&WPs processing and export of Vietnam

3.2.1. Achievements

- In term of material sources, firstly, the output of timber harvested from planted forests has increased continuously over the years. Domestic planted timber has meet more than 70% of the total required amount of raw materials for the processing industry. The increasing production of planted forest wood has created favorable conditions for the processing industry, gradually reduced dependence on imported materials, contributed to reducing production and product costs, and at the same time created competitive advantages for Vietnamese wood products.

Secondly, to promote sustainable development, Vietnam has implemented numerous initiatives to enlarge its green coverage and has encouraged wood processing enterprises to use legally harvested wood materials for their production. By the end of 2017, the Forest Stewardship Council (FSC) gave 732 Vietnamese enterprises a Chain of Custody certificate. FSC also has awarded 49 enterprises with Forest Management certificates for sustainable plantation areas of approximately 226,500 hectares (Kiet Vo và Linh Nguyen, 2020). Besides, as a result of a Voluntary Partnership Agreement with the EU that entered into force in June 2019, Vietnam is now drafting legislation to implement a national timber legality assurance system. This system regulates timber harvested, transported, traded, and processed in accordance with requirements and regulations of international conventions that Vietnam is party to and requirements of countries that import processed wood products from Vietnam related to the management and traceability of forest products.

- In term of manufacturing stage, first, the internal resources of wood processing enterprises have been greatly improved. Enterprises are changing their management thinking towards a professional way, investing in technology to improve labor productivity.

Second, the abundant human resources from the young population structure and the ingenuity, meticulousness and creativity of the Vietnamese people are creating momentum for the wood processing and manufacturing industry to develop. According to the assessment of the General Department of Forestry (under MARD), in order to actively produce wood to the world market, Vietnamese enterprises now have been changed from a passive position to actively promote trade, seek opportunities to expand markets.

- Regarding W&WPs trading stage, despite facing many difficulties due to the impact of the Covid-19 epidemic and unpredictable developments in trade competitions between economies, the W&WP processing has made great efforts, overcome many difficulties and challenges, maintained production stability and affirmed the industry's position in the international arena.

In addition, Vietnamese Government has been created favorable macroeconomic environment for W&WP trading. The Government has been active in signing bilateral and multilateral free trade agreements which helps domestic W&WP processing firms expand their markets and boost up export.

Exports of W&WPs to important traditional markets such as China, Korea, the US and the EU are also maintained. Especially, in the EU market, in the group of tropical countries exporting interior and exterior furniture to the EU market, only Vietnam could maintain the export value to this market while that of other countries in the region fell sharply (Export value of W&WPs of Thailand, Malaysia, Indonesia and Phillipines to EU decreased by 29%, 22%, 10% and 9% respectively). In addition, in 2020, Vietnam has also promoted the development of a number of potential markets such as Canada, Thailand...

3.2.2. Challenges

In the coming time, the wood industry still face many challenges.

- Regarding wood materials, although wood harvested from domestic plantations has replaced more than 70% of imported wood, it is mainly wood with small diameter, low yield and low quality. Rubber and acacia are the two major species used to produce high value product for export, such as furniture. However, according to VIFOREST, the supply is limited at around about 2 million m^3. Therefore, Vietnam must import millions of cubic meters of diverse wood materials for its wood processing sector.

Besides, although there is a shift in the composition of imported raw materials from sources considered high risk to sources with lower risk but raw materials imported from countries considered as highly legal risk still account for a large proportion in the import structure of wood materials. Nevertheless, some enterprises continue to prioritize importing timber from these legally risky sources. Hence, many Vietnamese export wooden furniture manufacturers not only face legal risks but also will be affected their image in the context of international economic integration.

- Regarding manufacturing stage, old and outdated technology, low level of labor in many production facilities are also causing major obstacles, limiting the competitiveness of domestic wood enterprises. In fact, most Vietnamese wood enterprises just stop at producing detailed processing for foreign enterprises or manufacturing wooden products according to customers' samples. Not many businesses design their own designs to sell directly to customers, so the product price is low and less competitive in the market.

- In term of W&WP trading, Vietnam's wood associations have noted that many members are struggling with the order suspensions and cancellations. While large FDI enterprises may be able to navigate the COVID-19 crisis, many local producers, which are mostly small and medium scale, are facing difficulties. If the COVID-19 pandemic in the United States and the other large markets continues for an extended period of time, a significant number of Vietnamese furniture producers, especially small and medium sized companies, may face bankruptcy, threatening thousands of jobs.

3.3. Suggestions to encourage the development of Vietnam's W&WP production and export

To overcome the above challenges, the wood industry needs to do the following tasks:

- Regarding the guarantee of raw materials for the wood processing industry: In the coming time, it is necessary to maintain an open import policy, creating conditions for enterprises to import raw materials for production and export as well as have policies to ensure source of raw materials. Accordingly, it is necessary to have a plan to develop a stable source of raw materials for wood processing, and at the same time increase the afforestation of large timber materials to meet the growing demand for raw materials of the wood processing and export industry. Organize propaganda for people and businesses not to exploit young forests, conduct large timber business, create a source of quality raw materials for the wood processing industry.

A plant quarantine exemption for imported logs and sawwood from wood exporting countries to Vietnam with legal certificates should be considered to remove difficulties and obstacles for importers.

- In term of processing stage, consistently developing reputable brands and improving product quality are tasks should be doen. In particular, it is necessary to study and have tax incentives to create conditions to encourage organizations, individuals and enterprises to process advanced, modern and environmentally friendly wood and forest products.

- About trading stage, it is necessary to promptly remove difficulties and create favorable conditions for the production and trading of wood and wood products. Well implement the provisions of law on product origin and origin, detect and notify state management agencies to strictly handle commercial frauds (GSO, 2021). Besides, maintaining traditional export markets, seeking and expanding new and potential markets, and focusing on market development should also be considered.

4. CONCLUSION

Over the years, Vietnam has achieved high results in timber product export. Vietnam has become the leading country in ASEAN countries, achieved the second position in Asia and the fifth in the world in terms of exporting W&WPs. However, in the context of economic integration, when Vietnam has signed trade agreements with many countries, many challenges has posed to the export of W&WPs. These challenges can be small-diameter domestically planted forest wood does not meet the requirements of raw materials for the production of wooden furniture for export; Imported wood materials do not meet the legal requirements; Processed wooden products has poor design diversity, low quality and is mainly manufactured under contracts for foreign enterprises; and Bad effects of the Covid pandemic.

The paper shows that severals actions should be taken so the W&WP processing and exporting industry can overcome the challenges.These actions should focus on dealing with the existing problems of material sources, manufacturing proccess and trading stage.

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CHẾ BIẾN VÀ XUẤT KHẨU GỖ VÀ SẢN PHẨM GỖ TẠI VIỆT NAM

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[1]*Trường Đại học Lâm nghiệp*

TÓM TẮT

Trong hai thập kỷ qua, từ năm 2000 đến năm 2020, giá trị xuất khẩu gỗ và sản phẩm gỗ của Việt Nam đã tăng từ 219 triệu đô la Mỹ lên 12,3 tỷ đô la Mỹ, đây có thể được coi là bước phát triển đột phá. Tuy nhiên, không dừng lại ở đó, Chính phủ Việt Nam đã giao chỉ tiêu cao hơn nữa cho ngành gỗ trong những năm tới, với kim ngạch xuất khẩu 20 tỷ đô la Mỹ vào năm 2025. Tuy nhiên, ngành chế biến và xuất khẩu gỗ và sản phẩm gỗ của Việt Nam vẫn còn nhiều thiếu sót. Bằng cách áp dụng phương pháp thống kê so sánh và mô tả, bài báo phân tích thực trạng chế biến, xuất khẩu gỗ và sản phẩm gỗ của Việt Nam theo 3 giai đoạn: cung cấp nguyên liệu, sản xuất gỗ và sản phẩm gỗ, xuất khẩu gỗ và sản phẩm gỗ. Dữ liệu chủ yếu được sử dụng trong bài báo được trích xuất từ các nguồn chính thức trong nước và quốc tế, như Tổng cục Thống kê, ITTO và FAO. Gỗ và các sản phẩm từ gỗ trong bài viết này bao gồm gỗ tròn, gỗ xẻ, veneer, ván ép (thuộc nhóm HS44) và đồ nội thất bằng gỗ. Bài báo cũng chỉ rõ những thành tựu và thách thức của ngành chế biến gỗ và sản phẩm gỗ Việt Nam. Từ đó đưa ra một số đề xuất nhằm giúp ngành gỗ và sản phẩm gỗ Việt Nam vượt qua thách thức, thúc đẩy tăng trưởng bền vững trong tương lai.

Từ khóa: gỗ nguyên liệu, gỗ và sản phẩm gỗ, ngành chế biến gỗ và sản phẩm gỗ, xuất khẩu.

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