



The Domestic Timber Sector in the Congo-Basin

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The research framework

- FLEGT, Illegal Forest Activities (IFAs), Politically Exposed Persons (PEPs)
- Asia, Africa, and global trends
- Why domestic timber sector?
 - *Terra incognita*
 - Impacts on SFM? Governance? Livelihoods?
- A concerted effort in the Congo-Basin



From producer...



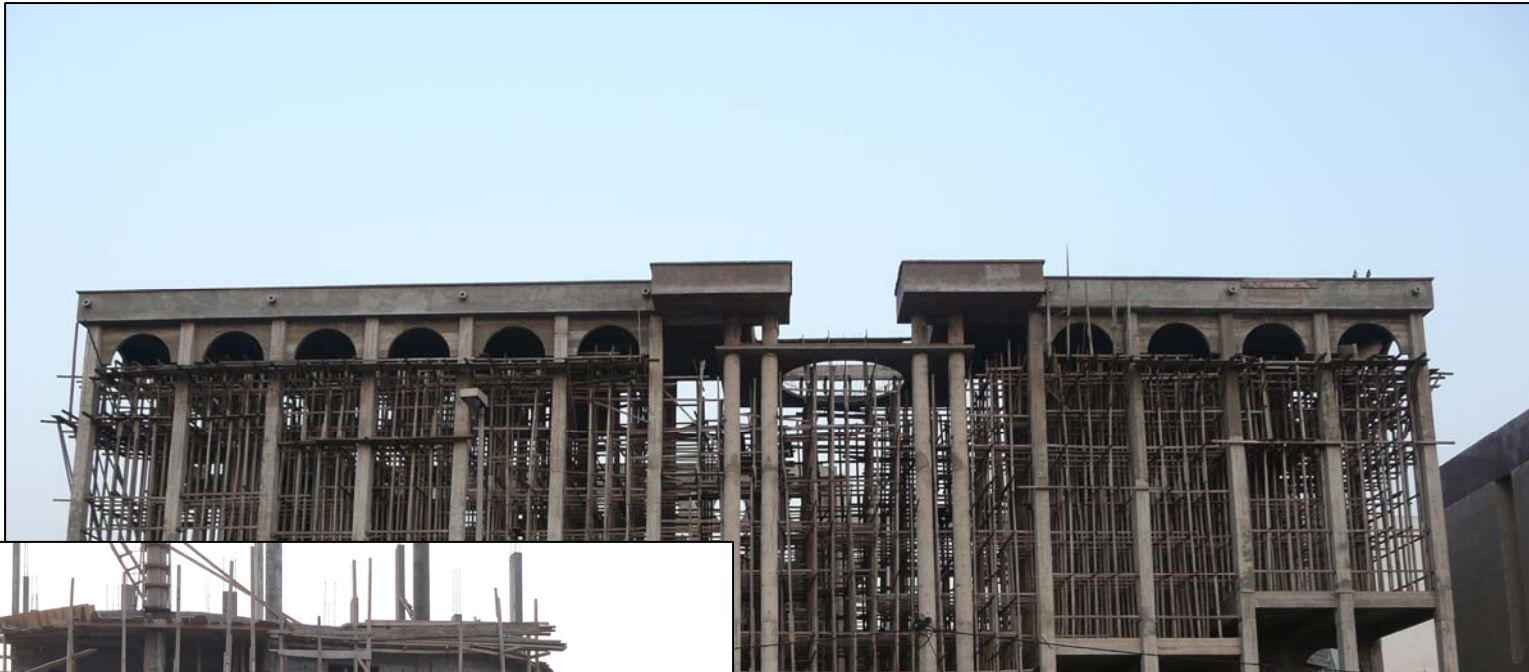
...(transport)...



...(selling)...



...to consumer



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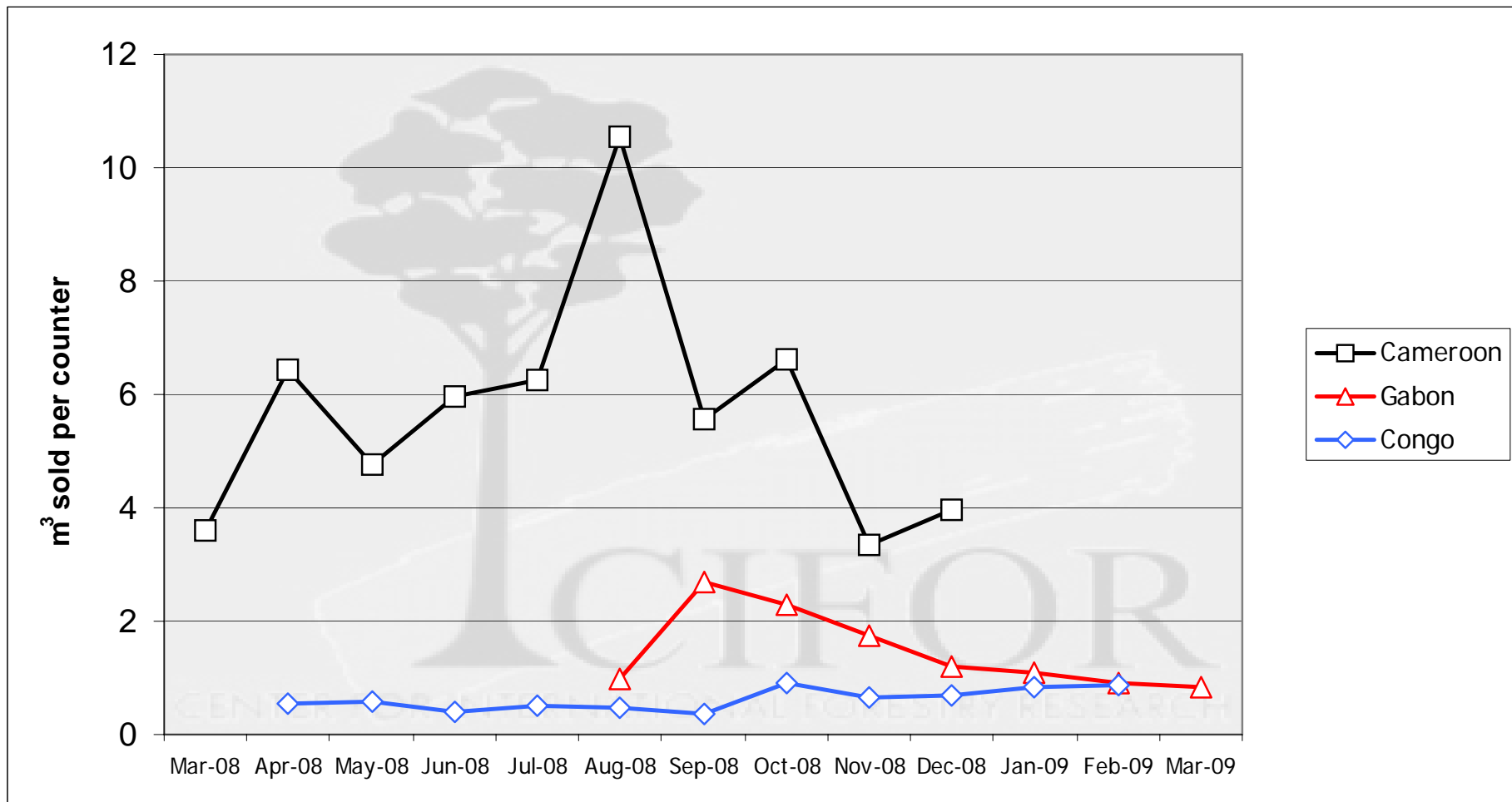


Data collection (on-going)

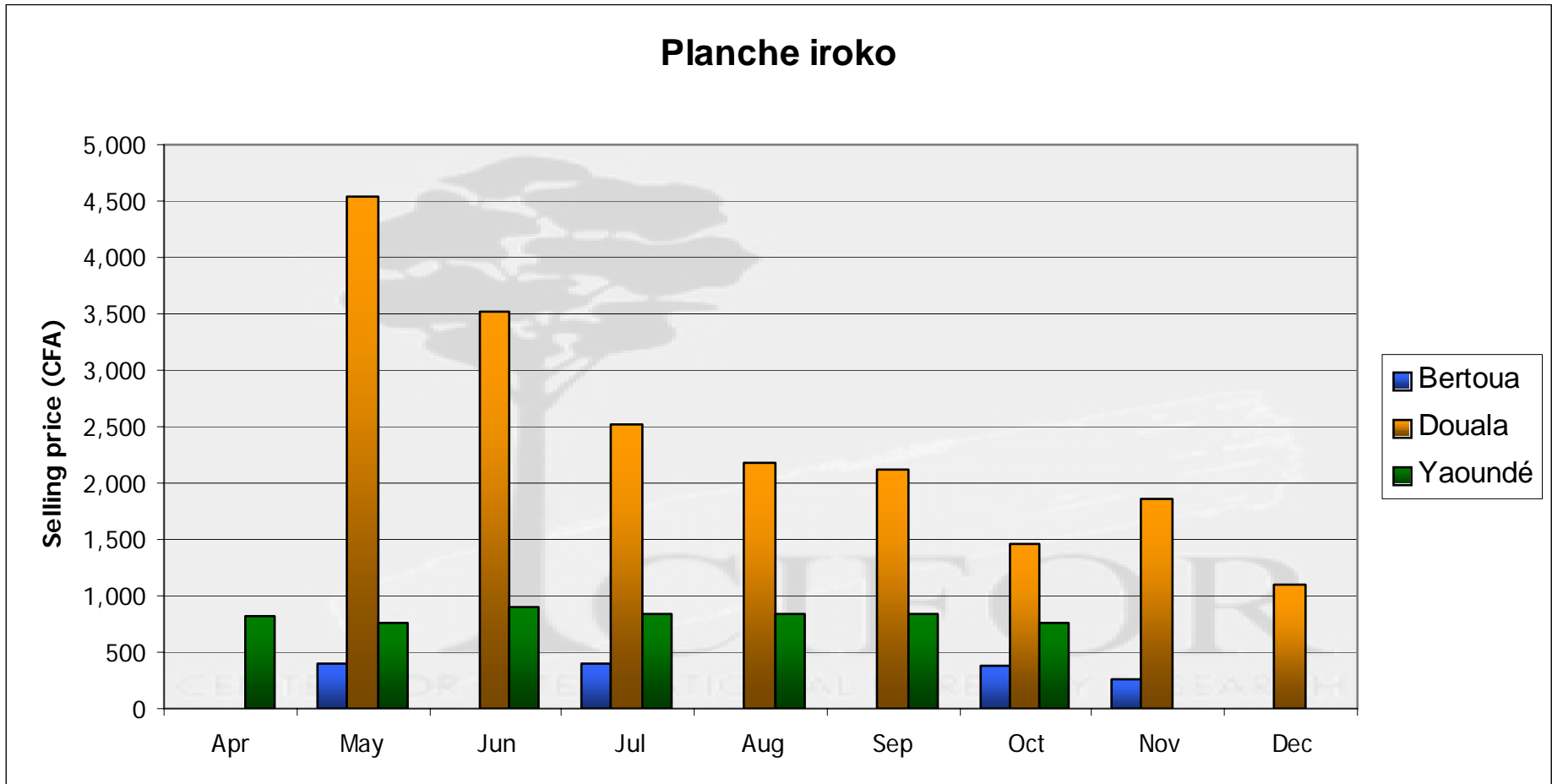
- Cameroon, Gabon, Congo, DRC
- 6-13 (18-24) months weekly data collection (markets and fluxes, day/night on main entry points, land/water)
- Detailed analysis of forestry operations (harvesting, transport, delivery, recovery rates and costs/benefits)

	Cameroon	Congo	Gabon	RDC
Towns with data collection	Bertoua, Douala, Yaoundé	Pointe Noire	Libreville	Kinshasa
Total selling points counted (markets)	885 (46)	127	210	200
Selling points with data collection (markets)	144 (34)	77	11	20
Forestry operations followed	216		35	

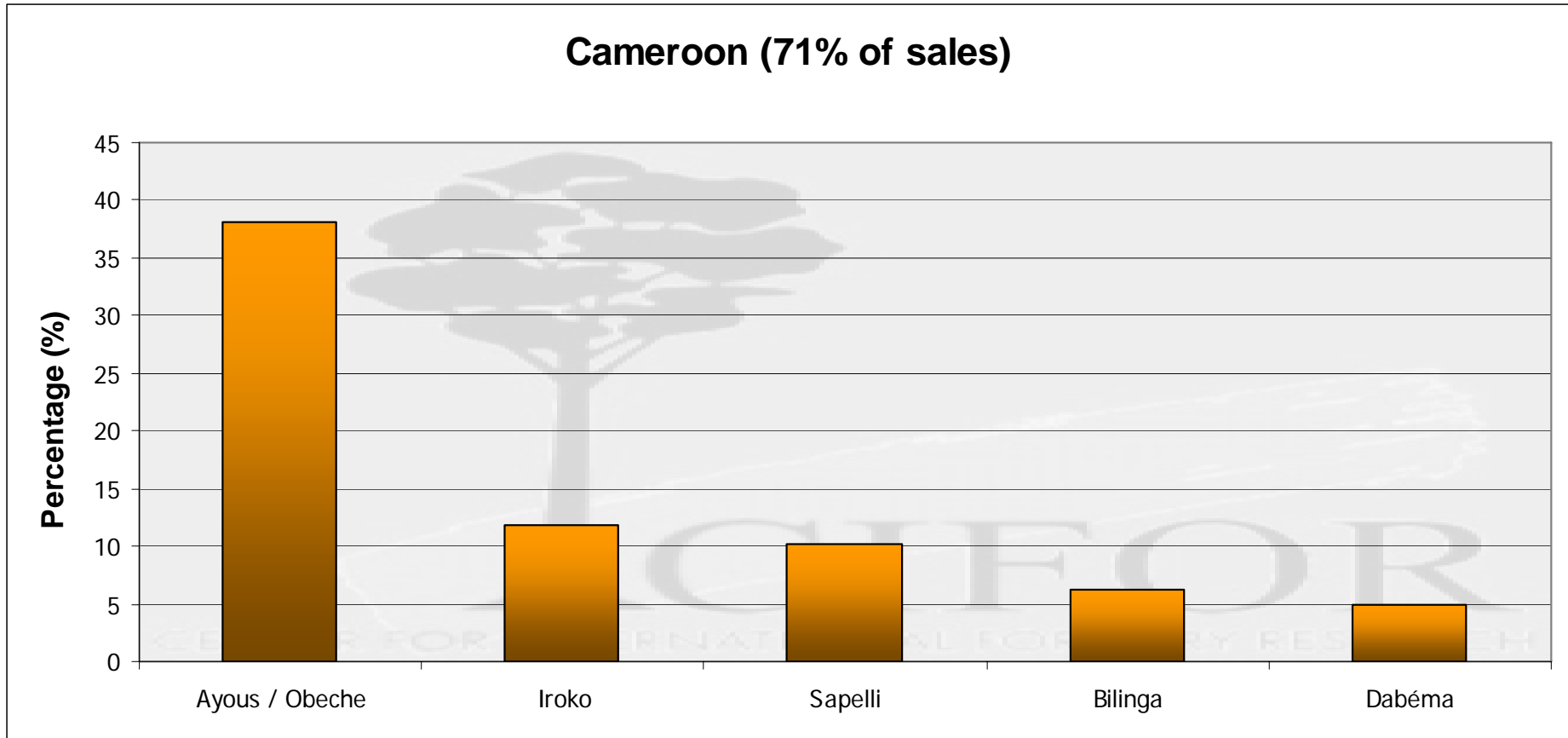
Seasonality 1



Seasonality 2



Most harvested species (Cameroon)



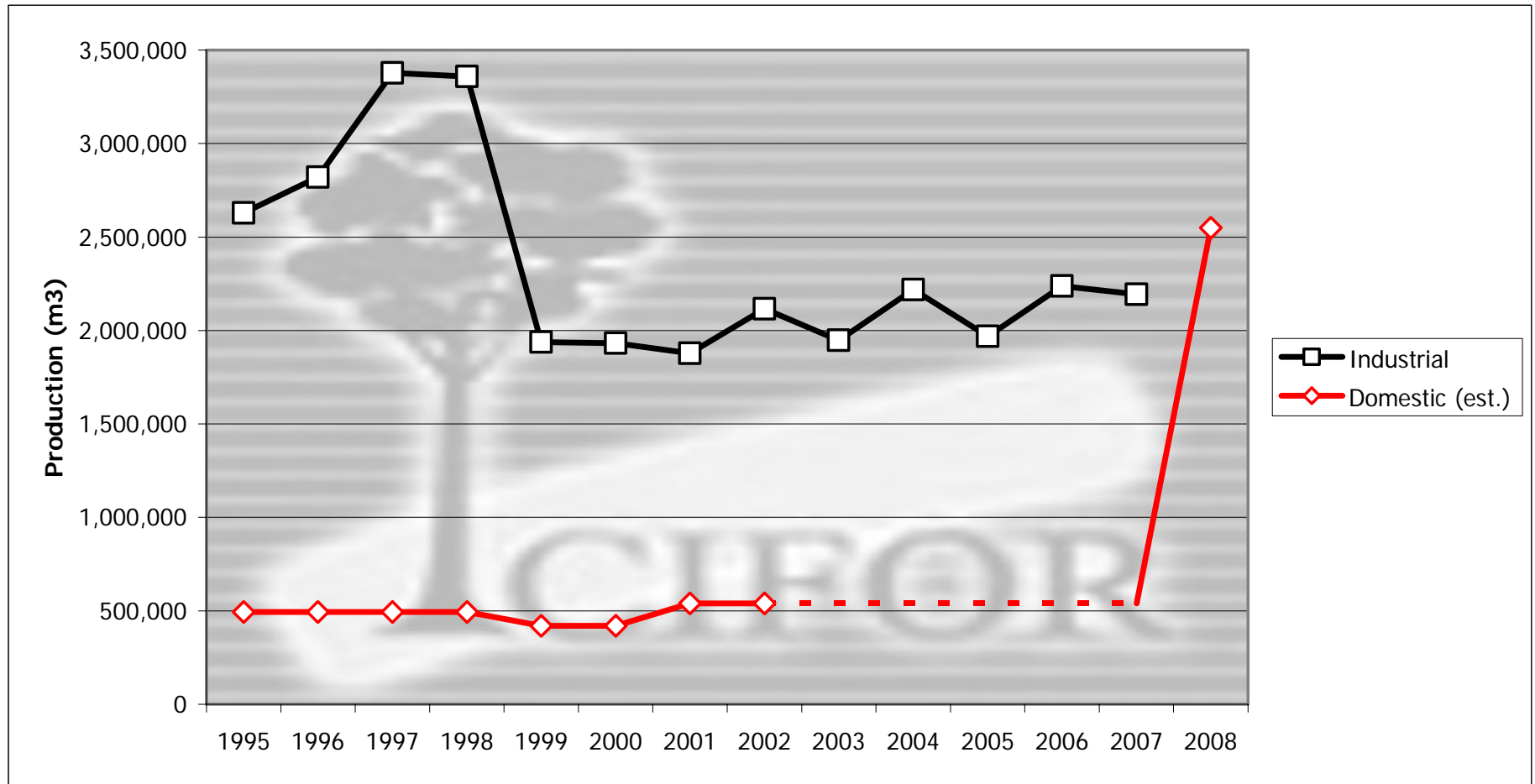
- Gabon, okoumé dominant

Est. annual sales (provisional data)

	Months extr.	Domestic (m ³ /yr, est.)	Industrial (m ³ /yr)
Cameroon	10	930,000	600,000
Congo (Point-Noire)	11	20,000	200,000
DRC (Kinshasa)	6	350,000	---
Gabon (Libreville)	8	120,000	300,000

- A vibrant sector
- Often inter-connected with the industrial sector
- Thousands of people involved
- No legal (environmental and financial) framework

Cameroon (10/12 months extr.)

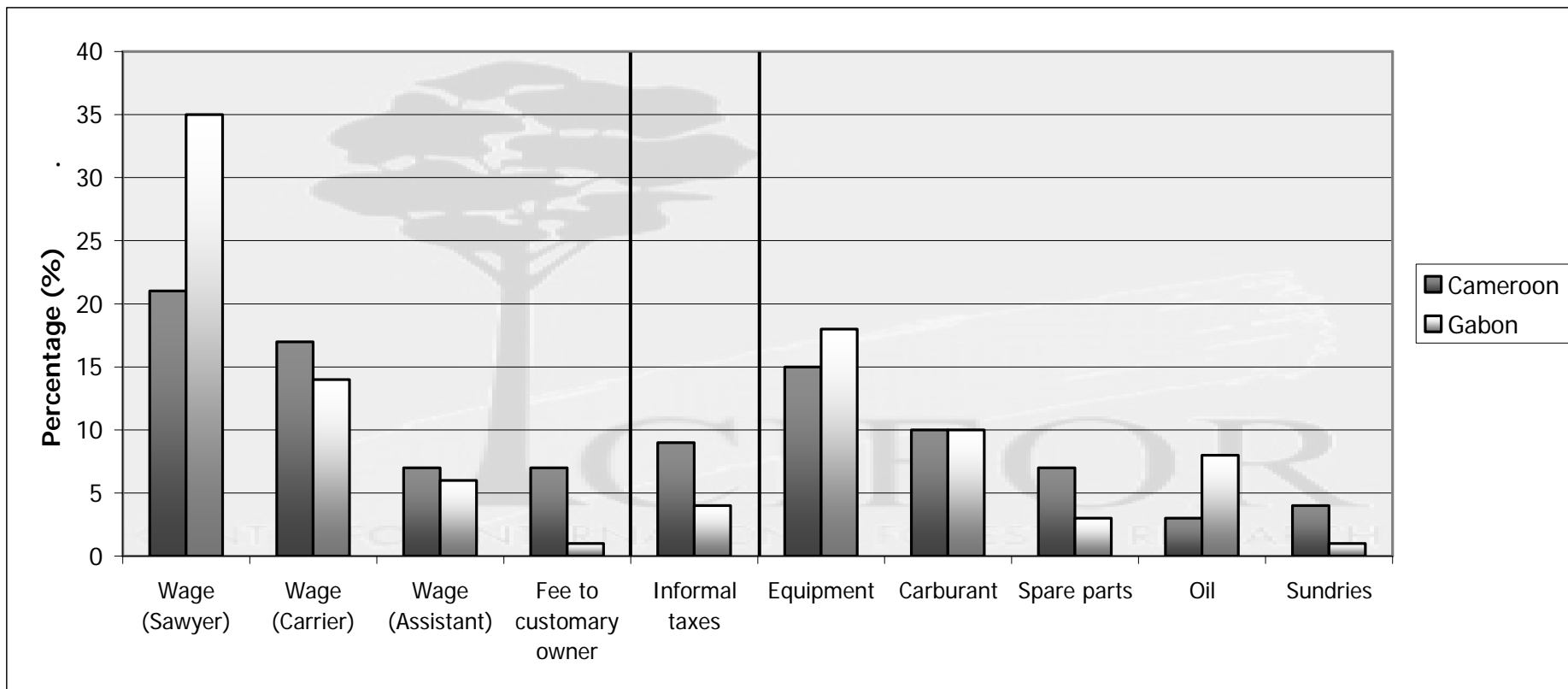


Costs, benefits...

	Costs (CFA/m ³)	Profit (CFA/m ³)	Financial gain (CFA billion)
Cameroon	22,200	7,800	26
Gabon	24,400	13,300	1.6

- Two main types of exploitation/marketing (Cameroon)
 - Very different policy implications
- Large (under-researched) contribution to rural economies (Cameroon CFA 26 billion/yr v. CFA 6 billion/yr of the “Annual Area Fee” - *RFA*)

...And rural livelihoods



- Informal taxes: Gabon 1-2,000 CFA/m³, Cameroon 2-3,000 CFA/m³

The loggers' problems...

Gabon	Ranking (%)	Cameroun	Ranking (%)
Abuses of power by the administration	64%	Administrative hassles	75%
Technical problems of harvesting	41%	Abus de confiance	25%
Road conditions	32%	Negotiations with tree owners	18%
Dangerous activities in the forest	32%	Cost of materials and transport	18%
Commercialisation in Libreville	21%	Dangerous activities in the forest	17%
Relations with buyer ("patron")	18%	Bad conditions of materials	13%
Lack of financial resources	12%	Difficulties in finding "good" trees	10%
Lack of legal title	10%	Difficulties in finding buyers	10%
Difficulties in finding "good" trees	7%	Lack of financial resources	10%
		Fees	8%
		Lack of legal title	7%
		Timber theft	7%

Conclusion

- Domestic timber sector
 - Informal, unaccounted for, but positive impacts on rural livelihoods (ecological impacts to be better researched)
 - Do not criminalise, but secure and professionalise instead
- Illegal logging
 - Need-based v. Greed-based
 - Clear understanding needed before policy options are formulated (avoid 1999!)



Merci beaucoup

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