

Report of the International Forum

Together Towards Global Green Supply Chains: A Forest Products Industry Initiative



22–26 October 2019
Shanghai, China



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The International Tropical Timber Organization (ITTO) is an intergovernmental organization promoting the conservation and sustainable management, use and trade of tropical forest resources. Its members represent the bulk of the world's tropical forests and of the global tropical timber trade. ITTO develops internationally agreed policy documents to promote sustainable forest management and forest conservation and assists tropical member countries to adapt such policies to local circumstances and to implement them in the field through projects. In addition, ITTO collects, analyzes and disseminates data on the production and trade of tropical timber and funds projects and other actions aimed at developing sustainable forest industries at both the community and industrial scales. Since it became operational in 1987, ITTO has funded more than 1000 projects, pre-projects and activities valued at more than USD 400 million. All projects are funded by voluntary contributions, the major donors to date being the governments of Japan and the United States of America.

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FOREWORD

Forests and wood products are increasingly seen as important contributors to the Sustainable Development Goals, including SDG 13 (“climate action”). Among other things, sustainably produced wood can store carbon in long-life wood products and substitute for emissions-intensive materials.

The raised profile of forests and wood products represents an opportunity for the forest sector to help build a biocircular economy. Crucial for doing this is the development of green timber supply chains to ensure legality and sustainability, from the tree in the forest to the product in the market.

The International Forum: Together Towards Global Green Supply Chains was the first global dialogue on how to improve the legality and sustainability of tropical timber supply chains. It brought together more than 350 people, including government representatives, major players in the tropical timber industry and trade, and civil-society organizations. Participants broadly acknowledged the strong links between the legal and sustainable management of tropical forests and climate-change mitigation, biodiversity conservation and poverty alleviation.

Within their respective constituencies, the co-organizers of the forum—ITTO, the China Timber and Wood Products Distribution Association (CTWPDA), the Centre for International Forest Products Trade (CINFT) of the National Forestry and Grassland Administration of China (NFGA), and the International Tropical Timber Technical Association (ATIBT)—strive for continuous improvement in the tropical forest sector. We believe that the Global Green Supply Chain (GGSC) Network, which was established by acclamation at the forum, will help foster positive relations, partnerships and innovative thinking in the global trade of tropical forest products. In this way, it will play an important part in enabling tropical forestry to fulfil its potential as part of a biocircular economy.

The forum’s outcomes, including the declaration published below, have set a foundation to enable stakeholders to work together through the GGSC Network. The aim is to incentivize the responsible production and consumption of tropical wood products to provide wide-ranging environmental and socioeconomic benefits in both producer and consumer countries.

We recognize that many challenges remain in achieving global green supply chains. Nevertheless, ongoing dialogue in the GGSC Network will help illuminate the path ahead.

We express our gratitude to all participants in the forum for their engagement, enthusiasm and inputs; the donors for their crucial support; and all those who worked hard to make the forum a success. We are excited about the future that global green wood supply chains can bring as a nature-based solution to global challenges.

Gerhard Dieterle
ITTO Executive Director

Benoit Jobbe-Duval
ATIBT Managing Director

Liu Nengwen
CTWPDA President

Wang Dengju
CINFT– NFGA Executive
Director

ACRONYMS

| | |
|---------|--|
| ALPLP | China Real Estate Joint Purchasing Platform |
| ATIBT | International Tropical Timber Technical Association |
| B2B | business-to-business |
| CGCF | China Green Carbon Foundation |
| CIB | Congolaise Industrielle des Bois |
| CINFT | Centre for International Forest Products Trade |
| CIRAD | Agricultural Research for Development |
| CNY | Chinese yuan |
| COMIFAC | Central African Forest Commission |
| CTWPDA | China Timber and Wood Products Distribution Association |
| EU | European Union |
| FAO | Food and Agriculture Organization of the United Nations |
| FLEGT | Forest Law Enforcement, Governance and Trade |
| FSC | Forest Stewardship Council |
| GGSC | Global Green Supply Chains |
| ITTO | International Tropical Timber Organization |
| NFGA | National Forestry and Grassland Administration of China |
| PEFC | Programme for the Endorsement of Forest Certification |
| PPECF | Programme to Promote the Exploitation of Certified Forests |
| rwe | roundwood equivalent |
| SFM | sustainable forest management |
| STTA | Shanghai Timber Trade Association |
| USD | United States dollar(s) |

FORUM DECLARATION

Key Outcomes – INTERNATIONAL FORUM – Together Towards Global Green Supply Chains – for Global Green Supply Chains – A Forest Products Industry Initiative

Forests are crucial terrestrial ecosystems, providing essential environmental, social, cultural and economic services and functions on which humanity depends. Their restoration and sustainable management will contribute to the achievement of several of the Sustainable Development Goals (SDGs), particularly those related to responsible consumption and production, climate action, and life on land.

Indeed, forests can contribute to solving many of the unprecedented global challenges we face today, including by mitigating climate change through carbon sequestration and storage. Sustainable forest management, particularly in the tropics, will reduce biodiversity loss and prevent the degradation of land and water resources while meeting rising demand for wood products from the rapidly growing global population.

Wood products, one of the main revenue earners of sustainable forest management, has been an essential material through history. It is used in housing, construction, shipbuilding and the furniture sectors, among many other applications. The latest special report by the Intergovernmental Panel on Climate Change (IPCC) states that sustainably managed forests and wood products are key elements for decarbonizing and moving towards a bio-based circular economy by sequestering carbon dioxide from the air and storing it in terrestrial sinks and forest products and by substituting the use of non-renewable materials and energy. This is of critical relevance to the forest industry gathered here today, because nature-based solutions to climate change involving trees and forests can only be fully achieved within the framework of legal and sustainable supply chains, from the forest to the market.

Harnessing the benefits of legal and sustainable supply chains will require the strong commitment of, and coordinated and well-documented actions by, the many actors in supply and value chains. Participants in this Forum identified the following key ingredients for achieving legal and sustainable supply chains: sufficient technical expertise, research, capacity building and know-how; fiscal and other macro-economic incentives for good business; access to finance at affordable interest rates; the availability of information and data for decision-making; stable legislation; and transparency and good governance.

To this end, the International Forum “Together Towards Global Green Supply Chains – A Forest Products Industry Initiative” held in Shanghai on 22–23 October 2019

highlighted the need to foster closer collaboration and exchange between all partners in global supply chains by sharing information and enhancing collaboration and know-how based on a voluntary network among forest managers, producers, traders, the processing industry and consumers. This network, referred to as the Global Green Supply Chain Network (GGSC Network), will be open to all interested supply-chain operators and related stakeholders.

The International Tropical Timber Organization (ITTO), under its Legal and Sustainable Supply Chains Programme (LSSC), and the co-organizers of this forum are committed to supporting and facilitating the establishment and operation of the GGSC Network. The work will include the following immediate next steps:

- the development of modalities of work and collaboration by building on the existing experiences of the GGSC platform in China;
- the building of an information database accessible to all, including the existing Global Timber Tracking Network (GTTN);
- taking into account existing verification of legality and sustainability mechanisms within existing global rules and legal frameworks;
- supporting the implementation of a business-to-business communication and information exchange as part of the GGSC Network, building on the output of an ITTO project, making this information publicly available on a monthly basis (including information and data on markets for timber and wood products).

The **additional noteworthy key outcomes** from this Forum are:

- Enhanced collaboration between the Union des Forestiers Industriels du Gabon et Aménagistes (UFIGA) and the Union Forestière des Industries Asiatiques au Gabon (UFIAG) in support of the establishment of GSSC Initiative and the commitment from the Gabonese forest industries in moving towards independent third-party certification of legality and/or sustainability for their forest operations within a three-year period.
- The establishment of an international entrepreneurs' and private-sector expert team who will communicate regularly to consolidate challenges, opportunities and measures to be taken to further the aims of legal and sustainable supply chains, to be fed into the GGSC Network.
- The enhanced collaboration between the International Tropical Timber Technical Association (ATIBT) and the Global Green Supply Chains (GGSC) Secretariat, based in China.
- The strengthened dialogue, collaboration and formalization of the working relationship between the ATIBT and the China Timber & Wood Products Distribution Association (CTWPDA) in order to increase the impact of sustainably produced wood from West and Central Africa.

The Forum acknowledges that markets for legal and sustainable wood products could further incentivize sustainable forest management, particularly in the tropics, and

further acknowledges the important role of the private sector in connecting the various links of the supply chain. Therefore, we invite all stakeholders to join the GGSC Network, which aims to add value to forest resources through the full recognition of their economic, social and environmental values, and the incorporation of the concepts of legality and sustainability in all forestry operations with a voluntary stepwise approach. We further urge the private sector to embrace the multiple benefits above, requiring sustained efforts and participation at the global level and for current and future members of the GGSC Network to incorporate progress towards achieving legal and sustainable supply chains. The joint efforts through this International Forum will contribute positively to the Collaborative Partnership on Forests (CPF) Joint Initiative, Sustainable Wood for a Sustainable World (SW4SW).

We call on all stakeholders to strive towards the common goal of achieving legal and sustainable timber supply chains, and we commit to convening again next year to report on progress and share experiences gained.

The forum's agenda, photos, presentations and press release are available at www.itto.int/news/international_forum_creates_network_to_encourage_global_green_timber_supply_chains

INTRODUCTION

This international forum was an initiative of the private sector funded primarily by the German Federal Ministry for Food and Agriculture. Its aim was to promote nature-based solutions as part of global efforts to implement the UN Sustainable Development Goals by advancing legal and sustainable timber supply chains. Such supply chains will incentivize responsible forest production and purchasing practices while also leading to additional benefits in poverty alleviation, the creation of rural and urban employment, economic growth, income generation, and substantial climate-change mitigation.

The forum involved two days of intensive plenary discussions, a field trip to wooden-flooring factories in Huzhou, China, and other activities. It was the first global dialogue on how to improve the legality and the sustainability of tropical timber supply chains. More than 350 people attended, including major players in the tropical timber industry and trade.

The forum was co-organized by ITTO, the China Timber and Wood Products Distribution Association (CTWPDA), the Centre for International Forest Products Trade (CINFT) of the National Forestry and Grassland Administration of China (NFGA), and the International Tropical Timber Technical Association (ATIBT). The forum also received support from the Global Green Supply Chains (GGSC) Secretariat, the China Green Carbon Foundation (CGCF), the Programme to Promote the Exploitation of Certified Forests (PPECF), the CTWPDA Hardwood Sub-Committee and the Shanghai Timber Trade Association (STTA).

The formal component of the forum comprised an opening session, seven main sessions convened over two days, and a closing session. There was a particular focus on green timber supply chains between China and countries in the Congo Basin (especially Cameroon, the Congo and Gabon), but the forum also heard from speakers and panellists from Brazil, France, Germany, Indonesia, Malaysia, the Netherlands, Switzerland, the United Kingdom of Great Britain and Northern Ireland and Viet Nam. The Forum Declaration, agreed by acclamation and presented at the conclusion of the event, is reproduced on the preceding pages, and Annex 1 presents a second statement, "Initiative on Building a Collaboration Network of Green Supply Chain for Global Forest Products". Both documents were presented to the plenary and, combined, they represent a commitment among participants to develop a network for sharing information, experiences and expertise in the development of green timber supply chains.

The key points¹ made during forum sessions are summarized on the following pages, organized by session. Annex 2 comprises a list of forum participants.

¹ The key points listed in this report summarize noteworthy statements made by speakers, panellists and participants. Their inclusion does not indicate their endorsement by all forum participants, and nor do they necessarily represent the views of the forum's organizers.

DAY 1

Opening session

The Master of Ceremony at this session was Mr Li Jiafeng (Vice President, CTWPDA), and the speakers were Mr Su Chunyu (Chief Engineer of NFGA), Mr Liu Nengwen (President, CTWPDA), Dr Lee White (Minister of Forestry, Gabon), Dr Eva Müller (Director General of Forests, German Federal Ministry for Food and Agriculture), Mr John Leigh (Chair, International Tropical Timber Council), Mr Robert Hunink (President, ATIBT), and Mr Georges Moucharou (President, Central African Forest Commission—COMIFAC). Ms Rosalie Matondo (Minister of Forest Economy, the Congo) conveyed a video message. The following key points emerged:

- The world is facing unprecedented environmental challenges, including climate change, deforestation, species extinctions and desertification.
- Tropical forests have immense global value for the many products and ecosystem services they deliver, but they are under pressure from degradation processes and conversion to other more economically viable land uses.
- China is the world's largest producer and consumer of wood, with the total trade volume increasing four-fold in the decade to 2018.
- The Government of China recognizes the importance of forest products in economic development and is now actively promoting green timber procurement and supply chains.
- This forum may be seen as a watershed where producers and consumers came together to discuss a new vision for tropical forests and law-abiding companies committed to conserving forests in well-organized concessions to maintain ecosystem services for the benefit of the world's citizens. The aim is to provide a kick-off for further work in building a global green timber supply chains network that adds clear value to companies in both producer and consumer countries.
- Gabon has taken impressive steps to put in place a sustainable forest development model, with the aim, over time, of greatly increasing the contributions of the forest sector to economic development and employment, with positive outcomes for climate, biodiversity and forest-dwelling communities.
- Other countries in Africa, such as Cameroon and the Congo, have also taken significant steps forward, but much more needs to be done to develop green timber supply chains.
- Sustainable forest and wood use are key elements of Germany's strategy to combat climate change.
- Illegal logging and illegal timber trade harm the earnings and image of the forest industry. Consumers worldwide are worried by continued reports of illegal timber and may turn away from using wood products unless active steps are taken to address concerns.

Session I: Harnessing the role of the wood industry for climate change and the environment

The moderator of this session was Dr Claude Garcia (Agricultural Research for Development—CIRAD/ETH Zurich), the keynote speakers were Dr Gerhard Dieterle (Executive Director, ITTO) and Mr Chen Xiaolong (Chair, Power Dekor Group), and the panellists were Dr Lee White, Mr Zhu Guangqian (Chief Expert, CTWPDA), Dr François-Xavier De Donnea (Facilitator, Congo Basin Forest Partnership), Mr Liu Jiashun (Vice Chair, CGCF), Dr Yasman Irsyal (Indonesian Forest Concessionaires Association) and Mr Christophe du Castel (Head of Forest Department, Agence Française de Développement).

The session addressed the contributions of productive forests and the wood industry to sustainable development and the mitigation of climate change.

The following key points emerged from Dr Dieterle's keynote presentation:

- The population in Africa is likely to increase four-fold by 2100, and what happens in Africa, therefore, will strongly affect the way in which timber is traded internationally and used as a product in global markets.
- A wood supply gap is foreseen in coming decades that could reach up to 6 billion m³ per year globally. Companies that depend on international trade face a possible deterioration in supply in the long run and there is a strong need, therefore, for reinvestment in tropical forests and their restoration and to move towards legal and sustainable supply chains.
- The Intergovernmental Panel on Climate Change recognizes the role of forest products in climate-change mitigation, including their potential role in substitution for non-renewable materials.
- Maximizing the role of forest products in climate-change mitigation requires the documentation of timber supply chains.
- ITTO's approach involves, among other things, promoting legal and sustainable supply chains; investing in forest restoration and livelihoods; and enhancing biodiversity.
- The development of sustainable supply chains requires incentives—financial, administrative and reputational—for good businesses. It also requires access to the necessary information and data to develop green supply chains, as well as skilled workforces.

The following key points emerged from Mr Chen's presentation:

- The Paris Agreement on climate change recognizes sustainable forest management (SFM) as an important part of the global response to climate change after 2020.
- Yet people perceive that harvesting is destructive to forests and therefore a misunderstanding persists of the forest industry—even though agriculture is a greater threat.

- Scientific, sustainable harvesting is a necessary condition for the healthy development of the forest industry and for making a positive contribution to climate-change mitigation.
- Domestically, China has been actively promoting plantations and increasing forest cover; protecting upstream natural forests and restoring forests; deploying large numbers of rural workers in restoration work as a poverty-alleviation programme; and promoting the sustainable use of timber materials and the development of the forest industry.
- The company Power Dekor avoids and eliminates illegal or controversial sources of wood raw materials in its procurement, strictly selecting legal, high-quality wood certified by the Forest Stewardship Council (FSC) and verified sources.
- Power Dekor has continuously increased the production and supply of certified forest products in its supply chain, developed a corresponding action plan, introduced product source tracking and transparency mechanisms, and implemented a sustainable business development strategy.
- Power Dekor regards its green supply chain as the foundation of its success.

The following key points emerged from the panel discussion:

- Tropical forests are crucial for the fight against climate change; however, there is a general lack of recognition for the potential positive role of commercial forests in climate-change mitigation.
- If we work together, we can manage tropical forests for economic, climate and biodiversity benefits. Strong partnerships are needed between governments and companies that share a mutual desire to pursue forest legality and sustainability.
- There is a need to adhere to relevant regulations and best practices and improve conditions for local people (in the case of much of rural Africa, electrification is still needed for sustainable forest development). The wood industry can also make a major contribution to rural development.
- The forest industry is not just about wood products—many non-wood forest products also have important roles to play.

Session II: Demand and supply in global wood supply chains

The moderator of this session was Dr Wang Dengju (Acting Director, CINFT-NGFA), the presenters were Mr Rupert Oliver (ITTO Independent Market Monitor), Mr Liu Nengwen, Mr Shen Jianwen (Vice President, Jiangsu Wanlin Modern Logistics) and Mr George Tan (President, Timber Exporters Association Malaysia), and the panellists were Mr Liu Tuo (Director General for Reform and Development, NFGA), Mr Shen Beiling (Deputy General Manager, China Forest Products), Mr Ngo Sy Hoai (Deputy Secretary General, Viet Nam Timber and Forest Products Association), Mr Chen Hao (Société de Bois de Lastourville), Mr Bruno Maier (Business Development Manager, BVRio) and Mr Thomas Goebel (Secretary General, European Timber Trade Federation).

The discussion focused on trends in global timber supply and demand in various markets and on opportunities and challenges for increasing networking and collaboration between consumers and producers globally.

The following key points emerged from the session:

- There was a real increase in the value of tropical hardwood trade from 2004 to 2018, driven mainly by Viet Nam and its exports of wood furniture. There was little growth in value elsewhere, however.
- Before the global financial crisis, the European Union (EU) was the largest import market for tropical wood products, but it has now dropped to the fourth-largest.
- There has been huge growth in Vietnamese wood exports in the last decade, increasing by about USD 1 billion per year. On the other hand, export value has been declining from Malaysia.
- Indonesia is the first country to issue EU Forest Law Enforcement, Governance and Trade (FLEGT) licences.
- In Africa, there has been a trend away from value-adding and a large increase in log exports, especially to China. Viet Nam is beginning to emerge as an important importer of sawnwood and logs from Africa.
- The largest tropical log suppliers to China are Papua New Guinea and the Solomon Islands—with questions raised by some about where the logs are coming from and their legality and sustainability.
- 2018 was the first year in which there was an actual decline in global certified forest area. Relatively few certified forests are in tropical countries.
- There are opportunities to develop synergies between timber legality assurance systems and forest certification, the latter with a strong presence and brand image in markets and the former providing scale.
- China is the largest consumer of timber and wood products—exceeding 100 million m³ of imports roundwood equivalent (rwe) for the first time in 2017.
- Production value in China’s wood product industry is estimated at CNY 2 trillion (about USD 290 billion). Trade is highly dynamic and subject to rapid change in light of changing trade policies and factors such as foreign exchange fluctuations, conditions in the real estate market, environmental policies, and increasingly complex certification standards.
- Many small and medium-sized wood-processing factories in China have been closed because they could not meet new environmental requirements imposed by the government.
- In 2018, China’s timber consumption was 0.33 m³ rwe per capita, well below the global average of 0.52 m³, indicating an opportunity for growth.

- China was once the biggest market for Malaysian plywood; today, Malaysia imports plywood from China.
- Legality is one of the Chinese forest sector’s biggest challenges as it strives to meet demand—how to connect the “Chinese dream” and to combine it with the need to achieve legality and sustainability.
- Every country has its own laws and regulations for ensuring timber legality and there are differing definitions of legality. ITTO can facilitate dialogue between suppliers and consumers to ensure that regulations related to timber harvesting, transport, processing and trading are compatible and consistent.
- In terms of standards and certification, certification bodies should take different conditions in different countries into account. There should be more flexibility; not “one size fits all”.

Session III: Legality and sustainability in global wood-supply chains

The moderator of this session was Ms Sheam Satkuru (ITTO Director of Operations), the presenters were Mr Jean-Paul Grandjean (PPECF), Mr Du Jun (General Manager, China Real Estate Joint Purchasing Platform) and Mr Patrice Moussy (European Commission), and the panellists were Mr Kim Carstensen (Managing Director, FSC International), Mr Peter Latham (Chair, Programme for the Endorsement of Forest Certification—PEFC—Council), Mr Alain Karsenty (Research Unit GREEN, CIRAD), Mr Chen Danan (Assistant President, Power Dekor Group), Ms Thais Linhares-Juvenal (Team Leader, Forest Governance and Economics, FAO), Dr Lu Wenming (Deputy Director General, International Network for Bamboo and Rattan) and Mr Denis Mahongol (TRAFFIC International).

The session addressed the development of legality and sustainability in global wood supply chains, including legal and sustainable wood supply, national and international regulations and regimes, incentive mechanisms, the development of new technologies, timber legality verification, and independent third-party certification.

The following key points emerged from the session:

- Companies in the Congo Basin and elsewhere are disappointed that certification brings no price premium. Forest certification in Central Africa is among the most difficult in the world.
- Certification standards and market requirements are increasingly complex, and this is a burden for business, especially small and medium-sized enterprises.
- Efforts to boost timber legality in the Congo Basin through the PPECF involve three types of intervention: 1) establishment of institutional conditions; 2) improvement of industrial harvesting quality; and 3) reinforcement of communication with local people.
- The PPECF has had two phases: 2012–2017 and 2017–2021. It has a five-phase process to help companies achieve certification.

- The China Real Estate Joint Purchasing Platform (ALPLP) is a third-party procurement and business-to-business (B2B) trading platform for building materials jointly initiated by Vanke, CURA Investment and Zhongtian Holdings Group.
- The aim of the ALPLP is to establish a new model of collaborative development of real estate supply chains that provides services such as standard setting, joint bidding and quality inspection.
- On the basis of more than 30 years of experience and practice in Vanke’s new-product development, quality control and supply chain management, etc., ALPLP has improved industry procurement transparency and green procurement standards and raised the level of real estate supply-chain services by sharing resources and management experience.
- The ALPLP has considerable experience in promoting green wood supply chains, for example in wooden flooring.
- The EU FLEGT Action Plan was designed originally as a means to use trade as a lever for legality. The EU Timber Regulation came into effect in 2013, and it requires timber importers to do due diligence on the legality of their timber—where they buy from and who they sell to, and they must keep the records.
- No one can bring about sustainability on their own—we need to find a coordinated way to work together more than we do now. Achieving green supply chains may require a stepwise approach that is timebound with milestones—and legality can be a stepping stone towards sustainability.
- The benefits of sustainable wood products are known, but the challenge is to demonstrate that wood-based materials are from legal and sustainable sources.
- Public and private procurement policies and partnerships can provide a powerful pull factor for sustainability and certification.
- If the market is unwilling to pay for certification, a tax incentive policy could be a helpful tool—with preferential treatment for companies with legality verified or sustainably produced timber.
- Procedures for legality and sustainability need to be streamlined, and companies cannot shoulder too much of the responsibility. There is a need to harmonize the various requirements for both legality and certification; there is room for convergence.
- Sustainability and legality requirements, if fully implemented, will level the playing field by eliminating illegality. This should be the priority because illegal timber ruins the reputation of the entire sector and acts as a brake on increasing prices for legal timber.
- Local communities often face special difficulties in SFM, including obtaining certification, and need a supporting mechanism.

Session IV: Meeting challenges of global green supply chains

The moderator of this session was Dr Gerhard Dieterle and the panellists were Mr Ngo Sy Hoai, Mr Lu Weiguang (Chair, Anxin Flooring (Shanghai)), Mr Stéphane Glannaz (Chief Operating Officer, Precious Woods), Mr Armand Blaise Diamvinza (Deputy Manager, Afriwood), Ms Ma Lu (Chief Executive Officer, Guangxi Sunway Forest Products Industry) and Mr Zeng Youquan (Deputy General Manager, Treesun Flooring).

The session reviewed current challenges in achieving legality and sustainability across supply chains, as well as proposals for moving forward, based on the experiences of the private sector.

The following key points emerged from the session:

- The biggest challenges for companies in the context of legal and sustainable supply chains include public perceptions of the forest sector as a destroyer of forests and biodiversity; a lack of a price premium; complex procedures for legality assurance and certification; the lack of capacity of smallholders to obtain certification; an inability to verify certain claims in the supply chain; the impacts of green supply chains on profitability if processors bear all the cost burden; an uneven playing field for certified and uncertified products; and the complexity of supply chains.
- Means for moving forward include embracing green development; providing smallholders with assistance to adopt sustainable practices and obtain certification; being prepared to incur short-term costs, with longer-term corporate benefits; introducing more flexibility into wood-legality and certification requirements; facilitating dialogue between exporting and importing countries to increase understanding and the harmonization of wood-legality and certification requirements; working with all stakeholders; and speeding up efforts to reward good forest managers for ecosystem services.

DAY 2

Session V: Contribution of wood industry sector to climate-change impact and sustainable development

The moderator of this session was Dr Claude Garcia and the panellists were Mr Wang Chunfeng (Deputy Director General for the Department of International Cooperation, NFGA), Mr Vincent Istace (Corporate Responsibility and Sustainability, Congolaise Industrielle des Bois—CIB), Dr Emmanuel Groutel (Managing Director, Wale), Mr George Tan, Mr Jiang Wei (Chair, DAVE Flooring), Mr Guo Xiangyang (Chair, Shenzhen Sampo Furniture) and Dr Zhang Zhongtian (Deputy Executive Director, APFNet).

The following key points emerged from the session:

- The forest and wood products sectors can make substantial contributions to climate-change mitigation, including through the storage of carbon in forests and long-lived wood products and the use of wood as a climate-friendly substitute for carbon-intensive materials.
- The role of wood products in mitigating climate change could be increased by, for example, employing reduced impact logging; ensuring the traceability of products across supply chains; improving the design of wood products; and reducing waste at all links in the supply chain, including through the adoption of efficient technologies.
- The role of the wood industry in climate-change negotiations is not fully recognized, and governments rarely call on the private sector in such negotiations. To increase this role, an assessment is needed of the potential contributions of the wood industry and markets. The SDGs could also provide a suitable platform for integrating the wood industry into international negotiations.
- The private sector can work with government and other stakeholders to raise awareness among consumers on the role of the wood industry in mitigating climate change.
- The forest industry has not been blameless in tropical deforestation and degradation in the past and has a responsibility to help combat climate change and improve the livelihoods of the poor.
- China is working to integrate wood products into its national carbon accounting system. This is insufficient to increase wood use, however, and other financial/fiscal incentives are needed.

Sessions VI and VII: The state and future of the Congo Basin forests, and the economic sustainability of the wood industry in the Congo Basin

The moderator of Session VI was Mr F.X. De Donnea, the speaker was Dr Sylvie Gourlet-Fleury (CIRAD Research Unit on Forest and Societies), and the panellists were Dr Lee White, Mr Pierre Taty (Chief of Staff, Congo Ministry of Forest Economy), Mr Georges Mouncharou, Mr Zheng Jinming (President, Shanghai Hoist Timber), Mr Xu Jie (Chair, Yulin International Timber), Mr Zhang Guohua (Founding Chair, Association of Overseas Chinese in Gabon) and

Mr Alain Karsenty. The moderator of Session VII was Dr Ralph Ridder (Head of Forest Policy China, Deutsche Gesellschaft für Internationale Zusammenarbeit—GIZ), the speaker was Nicolas Bayol (President, ATIBT Forest Commission), and the panellists were Mr Robert Hunink, Mr Ashish Malik (Deputy General Manager, CIB), Mr Stéphane Glannaz, Ms Françoise van de Ven (Secretary General, Industrial Forestry Trade Union of Gabon), Mr Zhuang Bingchuan (President, Association of Overseas Chinese in Gabon), and Mr Armand Blaise Diamvinza.

The keynote by Dr Gourlet-Fleury delivered the following conclusions:

- Most of the data on population dynamics used to regulate logging in forest management plans in Central Africa come from only one site, M’Baïki in the Central African Republic. Plots and trials should be set aside in each large concession in the region, or at least shared among neighbouring concessions with similar ecological conditions, to gather more data. Establishing such a monitoring system requires about EUR 100 000 per site, with follow-up costs of about EUR 5000 per year. Which structure should be responsible for funding, establishing and managing such a system?
- The unsustainability of logging is enshrined in the laws of many countries in the region, based on unrealistic recovery rates specified in forest legislation.

The following key points emerged from the two sessions:

- COMIFAC embodies the common vision of ten Central African countries for SFM and development in the subregion and aims to harmonize efforts towards this end.
- Within the framework of COMIFAC, the Observatory of Central African Forests provides up-to-date data on forest ecosystems in the subregion by integrating data from contributing countries.
- There are 300 million ha of forests in the subregion, including many rare species.
- More than 50 million ha are allocated for commercial use, and around 7 million m³ of logs are harvested annually.
- The timber industry creates jobs, and some countries in the subregion are reducing log exports with the aim of increasing in-country log processing and thereby employment and value adding.
- Two-thirds of timber production in the subregion involves only a very small number of favoured species and the wide range of other tree species is underutilized; the full value of standing timber, therefore, is yet to be unleashed.
- 9.8 million ha of forest in Central Africa is certified, which is 19.3% of the total area of forests under concessions.
- There has been exponential growth in the Chinese market for Central African logs. In 2015–2016, 70% of logs were exported to China. A relatively small proportion of concessions run by Chinese operators in the subregion are certified and it is hoped this will increase in the future.

- Long-term monitoring at the M’Baïki experimental site in the Central African Republic indicates that logging has had minimal impact on biomass over time, but the abundance of the small number of commercially important species is declining. For sustainability, there is a strong need to increase the range of harvested species.
- Much more scientific monitoring of forest plots is required for the preparation of management plans in Central Africa to ensure sustainability. This is expensive, however, and funding for such monitoring is needed.
- If sufficient value cannot be obtained from SFM, including for local people, forests in Central Africa will come under increasing threat from illegal activities, leading to deforestation and forest degradation. For example, there is concern that people immigrating from West Africa into forests in Central Africa, driven by poverty and climate change, might increase pressure on forest resources in the absence of clear law enforcement and the perception of forests as a high-value resource.
- Timber prices in Central Africa have been flat in recent years, and there has been minimal investment in value adding. Therefore, there is a lack of revenue to help fund SFM and the development of green supply chains in the subregion. A clearer understanding of the forest resources and ecosystems is needed.
- An accountability mechanism is needed to ensure that all actors in supply chains assume a certain responsibility for SFM. The government has a major role to play in ensuring SFM and legality by applying and enforcing existing laws.
- Mechanisms are needed for effective communication between timber producer and consumer countries on forest, industry and environmental policies.
- Infrastructure is very poor in African countries, especially in the forest industry, and the quality of infrastructure is closely related to the level of economic development.
- Logging costs in the Congo Basin are among the highest in the world, and the utilization rate is very low. There remains an urgent need for better transport, communication and electricity infrastructure and more efficient production logistics.
- Infrastructure development has fixed costs but will pay off over time, and returns on investments will be realized when the use of many lesser-used species is more feasible.
- Forest companies have a corporate and social responsibility to help supplier countries to develop their infrastructure, but obtaining affordable loans for such investments is challenging, partly because there is credit tightness in the subregion but also because the timber industry is perceived as high-risk. On the other hand, reducing the requirement for timber companies to invest in public infrastructure could help increase their investment in wood-processing technologies in producer countries.
- Development banks and intergovernmental institutions can play a role and assist governments in developing infrastructure.
- Electricity supply is still poor in many parts of the subregion, even in peri-urban areas. Cogeneration at wood-processing mills is an increasingly realistic option, given that costs

are coming down for equipment and there is the potential to earn carbon credits. For example, the CIB cogeneration operation saves 5 million litres of fossil fuels per year, with significant reductions in greenhouse-gas emissions.

- The core of attaining green supply chains is value—when the forest value is fully captured, there will be sufficient resources in the system to ensure that all actors in supply chains obtain fair reward for sustainable practices.
- Improving relationships with local people, and ensuring their rights and access to benefits, is crucial for the development of SFM and green supply chains. This will require the evolution of the forest concessions model.
- There are opportunities in the subregion for fiscal reforms and to provide tax incentives for certified forest enterprises and to encourage investments in value-adding equipment and human resource development.
- The lack of reimbursement of value-added tax for companies involved in further processing has become a significant constraint in some countries. Transparency in the tax regime is crucial but sometimes lacking.
- High taxes on legal timber are a major burden on companies because they are often competing against illegal operations. Even though illegal timber is of poorer quality, people will still buy it because it's so much cheaper. Nevertheless, a reduction in taxes is a cost to the state, which would need to be funded.
- Preferential subsidies on imports and taxes on exports, such as higher tariffs on logs, would encourage value adding in supplier countries.
- There is a shortage of capital and skills in Africa and a lack of institutional support. Thus, there is a need for governments, industry, and international organizations to take a long-term approach to vocational training in the industry to support the development of green supply chains and create more jobs for Africans in African countries.
- A new five-year training-of-trainers project has been agreed, to be implemented by the ATIBT in the Congo Basin. This will help build the skills of tree-fellers and saw doctors, and in the management of more complex wood-processing technologies. Ideally, such training initiatives would be linked with existing institutions to help ensure sustainability when project financing expires.
- Wood yields in primary wood processing are very low in the subregion. This is an opportunity for producers to work in partnership with investors and companies in consumer markets to improve conversion rates in supplier countries through investments in new technologies and skills development. There is also an opportunity to develop markets for currently unused or undervalued residues from wood processing.

CLOSING SESSION

The moderator of this session was Dr Eva Müller and the panellists were Mr Xu Wei (Chair, Starforest Flooring), Dr Gerhard Dieterle, Mr Robert Hunink, Dr Luo Xinjian (Secretary General, GGSC Secretariat), Mr Huang Baozhong (Chair, Jiangsu Wanlin Modern Logistics), and Ms Thais Linhares-Juvenal.²

The following key points emerged from this session:

- Nobody can develop green supply chains alone. Better communication is needed along supply chains and with other actors, including governments.
- This is the first global dialogue on how to improve supply chains and make them legal and sustainable.

Panellists made the following suggestions in addressing the question, “What would be the function of a mechanism or network on a permanent level to improve dialogue and exchange on global green timber supply chains?”

- In creating a platform or network, it’s essential to know its mandate and its impact on local actions. It needs the strong commitment of its participants to ensure credibility. It should be connected to other initiatives and actions taking place locally.
- It is important to consider how the network will serve producers, suppliers and procurers and address the real, practical problems of its members.
- There is a need to connect with stakeholders, communicate with them and better understand their needs. The proposed network can help build trust and understanding while creating transparency and credibility among stakeholders and supply-chain actors. Any commitments should have a timeline.
- In the past, the global community has looked at forest companies as agents of destruction, but the aim of this initiative is to show that the industry can be part of the solution. There’s a strong need to improve the image of the forest sector globally.
- An important element for a network to be effective would be to build the capacities of weaker parties in supply chains. The network could also help ensure that all stakeholders have access to information, market data and methodologies.
- Together, through the network, it is possible to demonstrate to the international community that forest products are part of the global solution.
- The network will attract members by demonstrating inclusivity; increasing access to information; supporting weaker parts of supply chains; and raising the voice of participants for more funding for nature-based solutions.

² This session was held on Day 1 for logistical reasons.

- The function of the network must be clear—it should empower the forest industry to change its image and draw more positive attention from government. Ultimately, it should facilitate sustainable trade and the development of good actors in the industry.
- The network could assess the barriers to legality and certification in producer and consumer countries and develop a roadmap to tackle these obstacles.
- The network could also perform a role in guiding the younger generation towards sustainable timber consumption.

CONCLUDING REMARKS, OUTCOMES AND OTHER MATTERS

The moderator summed up by identifying the strong theme of discussions as being cooperation, trust, collaboration and alliances. The path to sustainability has four steps. First, realize that you can't make it alone. Second, start developing alliances with your peers. Third, the alliance extends to those who are not peers—governments, customers and non-governmental organizations. Fourth, the alliance extends to those who cannot speak, either because they are powerless or because they are not human (i.e. nature).

The most salient observation from the forum was that, despite the diversity of opinions presented, there was wide agreement that a clear paradox exists that all actors in the supply chain need to address urgently. One of the conclusions of the first day was that legality is the first step towards sustainability. On the second day, however, it was demonstrated that this is not the case because some laws, as currently designed, trap stakeholders in a pathway that is unsustainable by definition. The industry, policymakers, civil society and academia must urgently address this paradox. A failure to do so will defeat all efforts towards sustainability.

Outcome documents

The forum produced the following two outcome documents:

- Key Outcomes – INTERNATIONAL FORUM – Together Towards Global Green Supply Chains – for Global Green Supply Chains – A Forest Products Industry Initiative (reproduced at the front of this report).
- Initiative on Building a Collaboration Network of Green Supply Chain for Global Forest Product (Annex 1).

Field trip and days 3 & 4

Participants visited Zunmuhui (“wood museum”) in the afternoon of Day 2, including a side-event organized on legality verification and traceability (organized by the Global Green Supply Chains Secretariat and ATIBT) and a B2B exchange.

Participants visited three wooden-flooring companies in Huzhou on Day 3. Day 4 featured the separately organized Global Wood Flooring Conference and Global Hardwood Conference in Huzhou.

ANNEX 1

Initiative on Building a Collaboration Network of Green Supply Chain for Global Forest Products

From October 22 to 24, 2019, the International Forum on “Together Towards Global Green Supply Chains – A Forest Products Industry Initiative” was held in Shanghai, China. Representatives from industry sectors, associations, international organizations and research institutions all over the world agreed on a Chinese entrepreneurs' initiative “An Initiative on Jointly Building The Global Green Supply Chain (GGSC) of Forest Products” and jointly promoting the initiative to build a collaboration network of global green supply chain of forest products. Following consensus was reached:

We are well aware that forests are important for deferring climate change, maintaining biodiversity, and promoting sustainable development. Protecting forest resources and maintaining the ecological environment are our common responsibility.

We recognize that wood is a renewable and recyclable green material. The development of the forestry industry has contributed positively to the sustainable use of forest resources and the economic, social and ecological values.

We believe that building a global green supply chain is conducive to the effective integration of the entire industrial chain, forming a legal and sustainable production, distribution and consumption system so as to provide products for global consumers.

We realize that building a global green supply chain requires a joint effort from multiple stakeholders from both the production and consumption sides and it requires close cooperation across official departments, regions and nations.

We advocate that jointly, based on the principle of voluntary, openness, sharing and collaboration, to build a collaborative network of global green supply chain to promote the sustainable development of forest industries and contribute to the conservation and sustainable use of global forest resources.

ANNEX 2: LIST OF PARTICIPANTS

| Country | Organization | Name | Position |
|-----------------|---|-----------------------------|--|
| AUSTRALIA | ITTO | Alastair Sarre | Editor and Communication Consultant 编辑与传播部顾问 |
| BELGIUM 比利时 | Bois-Forêts-Consultances | Nicolas DUBART | Directeur 主任 |
| BELGIUM 比利时 | Congo Basin Forest Partnership (CBFP) / Partenariat pour les Forêt du Bassin du Congo (PFBC) | François-Xavier de DONNEA | Minister of State, facilitation du PFBC 国务大臣 |
| BELGIUM 比利时 | Congo Basin Forest Partnership (CBFP) / Partenariat pour les Forêt du Bassin du Congo (PFBC) | Pierre Elie S. PROCES | Facilitation Belge du PFBC |
| BELGIUM 比利时 | European Commission | Patrice MOUSSY | Head of Sector Forest 森林部门总经理 |
| BENIN 贝宁 | Office National du Bois | Orou Y Karim Daouda | Directeur Administratif et Commercial 行政和商务主管 |
| BENIN 贝宁 | CHAMBRE DE COMMERCE ET D'INDUSTRIE DU BENIN EN CHINE 贝宁公务员 | Baudouin Euloge OROU-YERIMA | Chairman Head of the Commercial Mission |
| BENIN 贝宁 | Office National du Bois | Daouda Takpara | Directeur Général 总经理 |
| BRAZIL 巴西 | TRC | Omiki Mouw | Sales Manager 销售经理 |
| BRAZIL 巴西 | BVRio | Bruno MAIER | Business Development Manager 商务发展经理 |
| CAMBODIA 柬埔寨 | Forestry Administration | Cheang Dany | Deputy Director General 副司长 |
| CAMBODIA 柬埔寨 | Forestry Administration | YOU VIY | Senior Advisor 高级顾问 |
| CAMBODIA 柬埔寨 | Grandis Timber Ltd. | Eugene Kraamwinkel | CEO 执行总裁 |
| CAMEROON 喀麦隆 | Ministry of External Relations | Noah Stephane Christel | Deputy Director for Asian Affairs 亚洲事务副主任 |
| CAMEROON 喀麦隆 | Biodiversity International | Ekue Marius Roigue Mensah | Scientist, Forest Genetic Resources and Restoration 森林基因资源和恢复专家, 驻喀麦隆代表 |
| CAMEROON 喀麦隆 | ANTAV Bois | Bienvenu MEBENGA | |

| | | | |
|-----------------|--|------------------------------------|--|
| CAMEROON 喀麦隆 | COMIFAC - Commission des Forêts d'Afrique Centrale | Raymond NDOMBA NGOYE | SECRETAIRE EXECUTIF 执行秘书 |
| CAMEROON 喀麦隆 | COMIFAC - Commission des Forêts d'Afrique Centrale | Valérie TCHUANTE TITE | Expert en Suivi Evaluation 评估专家 |
| CAMEROON 喀麦隆 | GBC | Florent BALOGOG BELL | Manager |
| CAMEROON 喀麦隆 | GFBC - Groupement de la Filière Bois du Cameroun | Fousseni FETEKE | Réfèrent FLEGT- Certification 森林执法认证员 |
| CAMEROON 喀麦隆 | GFBC - Groupement de la Filière Bois du Cameroun | Valentin MOUYENGA | Délégué Général 总代表 |
| CAMEROON 喀麦隆 | Ministry of Forestry and Wildlife | Georges Collins MOUNCHAROU NDJAYOU | Senior Water and Forestry Engineer, Technical Advisor No 1 |
| CAMEROON 喀麦隆 | Ministry of Forestry and Wildlife | Yvan Blackwell TAMBA KEYAKA | Diplomat, Office of the Minister |
| CAMEROON 喀麦隆 | PALLISCO | Laurent MONNIER | |
| CAMEROON 喀麦隆 | PALLISCO | Silvia LOVADINA | Assistante commerciale 商务助理 |
| CAMEROON 喀麦隆 | SEFECCAM | Samer OMAIS | Commercial 商务员 |
| CAMEROON 喀麦隆 | SEFECCAM | Wael OMAIS | Directeur commercial 商务经理 |
| CAMEROON 喀麦隆 | TRAFFIC 国际野生生物贸易研究组织 | Denis MAHONGHOL SIE | Senior Programme Officer |
| CHINA 中国 | INBAR - International Bamboo and Rattan Organisation 国际竹藤组织 | Jun Qi Wu | Director, Outreach & Communication Unit 外联主任 |
| CHINA 中国 | Plymex Timber Pvt Ltd | Srikant Jain | Director 主任 |
| CHINA 中国 | World Circular BioEconomy Forum (WCBEF) | Jin Hailiang | Business Development Director 商务发展主任 |
| CHINA 中国 | 上海安天国际贸易有限公司 Shanghai Antian International Trade Co.,Ltd. | 范国成 Fan Guocheng | 采购经理 Purchasing Manger |
| CHINA 中国 | 上海市木材行业协会 Shanghai Timber Industry Association | 汪少芳 Wang Shaofang | 秘书长 Secretary General |
| CHINA 中国 | 上海海关 Shanghai Custom | 曹洁 Cao Jie | 统计科科长 Head of Division of Statistics |

| | | | |
|-------------|---|----------------------|---|
| CHINA 中国 | 上海福人投资集团有限公司 FUREN GROUP | 陈跃住 Chen Yuezhu | 副总经理 Deputy General Manager |
| CHINA 中国 | 上海米昂木业有限公司 Shanghai Mion Wood Industry Co.,Ltd | 陈清同 Chen Qingtong | 总经理 General Manager |
| CHINA 中国 | 中国林业物资有限公司 (张家港) China Forestry Materials Corporation Limited (Zhang Jiagang) | 唐浩 Tang Hao | 职员 Office Clerk |
| CHINA 中国 | 中国林业物资有限公司 (张家港) China Forestry Materials Corporation Limited (Zhang Jiagang) | 尹川 Yin Chuan | 总经理 General Manager |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 刘颖 Liu Ying | 助理研究员 Research Assistant |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 李剑泉 Li Jianquan | 研究员 Researcher |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 胡延杰 Hu Yanjie | 副研究员 Associate Researcher |
| CHINA 中国 | 中国林产品有限公司 China National Forest Products Company Limited | 沈北灵 Shen Beiling | 副总经理 Deputy General Manager |
| CHINA 中国 | 中国林产品有限公司 China National Forest Products Company Limited | 那麟伟 Na Lingwei | 运营管理部副经理 Deputy Manager |
| CHINA 中国 | 全球林产品绿色供应链倡议 Global Green Supply Chain of Forest Products Initiative Secretariat | 金弘蔓 Jin Hongman | 专家 Expert |
| CHINA 中国 | 南京森林警察学院 Nanjing Forest Police College | 陈积敏 Chen Jimin | 治安学院副院长 Deputy Director of Public Security |
| CHINA 中国 | 江苏中信民业国际贸易有限公司 Jiangsu zhongxin minye | 范世民 Fan Shiming | 董事长 Chairman |

| | | | |
|-------------|--|-----------------------|--|
| | international trade Co. LTD | | |
| CHINA 中国 | 深圳市松堡王国家家居有限公司 Shenzhen Sampo Furniture Co.,Ltd. | 郭向阳 Guo Xiangyang | 董事长 Chairman |
| CHINA 中国 | 苏美达国际技术贸易有限公司 SUMEC International Technology Co., Ltd | 马肖 Ma Xiao | 业务经理 Business Manager |
| CHINA 中国 | 裕林国际木业有限公司 Yulin International Wood Industry Co., Ltd. | 许杰 Xu Jie | 董事长 Chairman |
| CHINA 中国 | 轩麟国际贸易（上海）有限公司 | 高志军 Gao Zhijun | |
| CHINA 中国 | 远东木业刚果（布）有限公司 SOCIETE D' EXPLOITATION FORESTIERE YUAN DONG | 方正 Fang Zheng | |
| CHINA 中国 | 青岛中南洋国际贸易有限公司 Qingdao Zhongnanyang International Trade Co.,Ltd. | 林金淋 Lin Jinlin | 总经理 General Manager |
| CHINA 中国 | ALONG SARL GABON | 李霞 Li Xia | 总经理助理 General Manager Assistant |
| CHINA 中国 | APFNet | Luo Xi | Communication Officer 联络官 |
| CHINA 中国 | APFNet | Zhang Zhongtian | Assistant Executive Director 助理执行主任 |
| CHINA 中国 | App (China) | Ms. Lesley Liu 刘佳欣 | 政府事务专员 |
| CHINA 中国 | EFI EU FLEGT Facility | 钦立毅 Qin Liyi | 中国项目主任 Facilitator for China |
| CHINA 中国 | FSC - Forest Stewardship Council | Lichao Ma | China Country Director 主任 |
| CHINA 中国 | FSC - Forest Stewardship Council | Yidi Li | Public Affairs Director 公共事务总监 |
| CHINA 中国 | GIZ-China | Bao YUAN | Technical Advisor, GIZ-China Forest Policy Facility (FPF) 森林政策基金技术顾问 |
| CHINA 中国 | Global Witness | Yi YIMIN | Senior Advisor 高级顾问 |

| | | | |
|-------------|---|--------------------|---|
| CHINA 中国 | INBAR - International Bamboo and Rattan Organisation 国际竹藤组织 | Lu Wenming | Deputy Director-General 副总干事 |
| CHINA 中国 | INBAR - International Bamboo and Rattan Organisation 国际竹藤组织 | Trinh Thang Long | Director of Communications and Outreach 外联主任 |
| CHINA 中国 | INBAR - International Bamboo and Rattan Organisation 国际竹藤组织 | Wu Junqi | Director of Communications and Outreach 外联主任 |
| CHINA 中国 | NEPCon | Dand Hanch | |
| CHINA 中国 | NEPCon | Gaojun Zhao 赵高军 | Responsible Sourcing Specialist 责任采购专家 |
| CHINA 中国 | NFGA | ZHAO HAILAN | 博士 |
| CHINA 中国 | Pöyry Management Consulting (Beijing) | 程贇 Cheng Yun | 高级顾问 Senior Consultant |
| CHINA 中国 | PROSPER SARL | 谢朝勃 Xie Zhaobo | 总经理 General Manager |
| CHINA 中国 | SHANGHAI WOODCRAFT CO. LTD 上海寰宸国际贸易有限公司 | Dennis JIH | General Manager 总经理 |
| CHINA 中国 | Teak Resources Co | Ane Moraes Dejuste | Sales Manager 销售经理 |
| CHINA 中国 | WWF China | Liu HE | Assistant officer (Forest) 森林助理官员 |
| CHINA 中国 | WWF China | Weiju LYU | Senior officer (Forest) 森林高级官员 |
| CHINA 中国 | WWF China | Wenbin HUANG | Practice Head (Forest) 森林实践领导 |
| CHINA 中国 | 万林物流 | 许杰 | 董事长 |
| CHINA 中国 | 上海佳府木结构工程有限公司 | 梁超 Liang Chao | 副总经理 Vice President |
| CHINA 中国 | 上海傲高商务咨询有限公司 | 宋车进 | 负责人 |
| CHINA 中国 | 上海博华国际展览有限公司 Shanghai Bohua International Exhibition Co.,Ltd | 张鞞玮 | 市场经理 Marketing Manager |
| CHINA | 上海博华国际展览有限公司 | 浦智颖 | 项目经理 |

| | | | |
|-------------|---|----------------------|---|
| 中国 | 司 Shanghai Bohua International Exhibition Co.,Ltd | | Project Manager |
| CHINA 中国 | 上海欧洋豪杰家具有限公 司 Shanghai Ouyang Haojie Furniture Co., Ltd | 冉雅美 Ran Yamei | 销售经理 Sale Manager |
| CHINA 中国 | 上海欧洋豪杰家具有限公 司 Shanghai Ouyang Haojie Furniture Co., Ltd | 魏忠华 Wei Zhonghua | 常务副总经理 Deputy General Manager |
| CHINA 中国 | 上海涵强木业有限公司 Shanghai Hanqiang Wood Industry Co., Ltd | 徐朝阳 Xu Chaoyang | |
| CHINA 中国 | 上海瀚达木业有限公司 Shanghai Hoist Wood Industry Co., Ltd | 郑嘉豪 Zheng Jiahao | 助理 Assistant |
| CHINA 中国 | 上海瀚达木业有限公司 Shanghai Hoist Wood Industry Co., Ltd | 郑金明 Zheng Jinming | 董事长 Chairman |
| CHINA 中国 | 上海福人投资集团有限公 司 FUREN GROUP | 郭柳 Guo Liu | 战略发展部总经理 Director of Strategic Development Department |
| CHINA 中国 | 上海雅勤木制品有限公司 | 陆国辉 | 总经理 General Manager |
| CHINA 中国 | 东北林业大学 Northeast Forestry University | 许民 Xu Ming | 教授 Professor |
| CHINA 中国 | 东北林业大学 Northeast Forestry University | 郭明辉 Guo Minghui | 教授 Professor |
| CHINA 中国 | 中国木材与木制品流通协 会 China Timber & Wood Products Distribution Association | 刘能文 Liu Nengwen | 会长 President |
| CHINA 中国 | 中国木材与木制品流通协 会 China Timber & Wood Products Distribution Association | 朱光前 Zhu Guangqian | 首席专家 Chief Expert |
| CHINA 中国 | 中国木材与木制品流通协 会 China Timber & Wood Products Distribution Association | 李佳峰 Lia Jiafeng | 副会长兼秘书长 Vice President & Secretary General |

| | | | |
|-------------|--|----------------------|---|
| CHINA 中国 | 中国木材与木制品流通协会 China Timber & Wood Products Distribution Association | 杨俊逸 Yang Junyi | 进出口商分会秘书长 Secretary General of China Wood Importers Committee |
| CHINA 中国 | 中国木材与木制品流通协会 China Timber & Wood Products Distribution Association | 王正杰 Wang Zhengjie | 项目助理 Project Assistant |
| CHINA 中国 | 中国木材与木制品流通协会 China Timber & Wood Products Distribution Association | 申伟 Shen Wei | 业务部主任 Director of Business Department |
| CHINA 中国 | 中国木材与木制品流通协会 China Timber & Wood Products Distribution Association | 肖明 Xiao Ming | 板材分会秘书长 Secretary General of China Wood Based Panel Distribution Committee |
| CHINA 中国 | 中国木材与木制品流通协会 China Timber & Wood Products Distribution Association | 马思然 Ma Siran | 业务主管 Business Development Manager |
| CHINA 中国 | 中国木材编辑部 | 李培新 Li Peixin | |
| CHINA 中国 | 中国林业物资有限公司 China Forestry Materials Corporation Limited | 宋慧 Song Hui | 贸易经理 Trade Manager |
| CHINA 中国 | 中国林业物资有限公司 China Forestry Materials Corporation Limited | 黄滨 Huang Bing | 总经理顾问 General Manager Consultant |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 孟倩 Meng Qian | 助理研究员 Research Assistant |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 廖望 Liao Wang | 研究实习员 Research Assistant |
| CHINA 中国 | 中国林业科学研究院林业科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 校建民 Xiao Jianmin | 副研究员 Associate Researcher |

| | | | |
|-------------|--|---------------------|---|
| CHINA 中国 | 中国林业科学研究院林业 科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 王璐 Wang Lu | 研究实习员 Research Assistant |
| CHINA 中国 | 中国林业科学研究院林业 科技信息研究所 Research Institute of Forestry Policy and Information, CAF | 王登举 Wang Dengju | 所长,研究员 Director, Researcher |
| CHINA 中国 | 中国林产工业有限公司 China National Forest Products Industry Corporation | 胡赵雨 Hu Zhaoyu | 部门经理 Department Manager |
| CHINA 中国 | 中国林产工业有限公司 China National Forest Products Industry Corporation | 许博 Xu Bo | 部门经理 Department Manager |
| CHINA 中国 | 中国绿色时报 | 张玉 | |
| CHINA 中国 | 中国绿色碳汇基金会 China Green Carbon Foundation | 何宇 He Yu | 办公室主任 Office Director |
| CHINA 中国 | 中国绿色碳汇基金会 China Green Carbon Foundation | 刘家顺 Liu Jiashun | 秘书长 Secretary General |
| CHINA 中国 | 中国绿色碳汇基金会 China Green Carbon Foundation | 杜永胜 Du Yongsheng | 理事长 President |
| CHINA 中国 | 久盛地板有限公司 Treessun Floor Co.,Ltd. | 曾有权 Zeng Youquan | 副总经理 Deputy General Manager |
| CHINA 中国 | 亚洲板材与家具 | 钟希 | |
| CHINA 中国 | 全球林产品绿色供应链倡 议秘书处 Global Green Supply Chain of Forest Products Initiative Secretariat | 李银凤 Li Yinfeng | 项目经理 Project Manager |
| CHINA 中国 | 全球林产品绿色供应链倡 议秘书处 Global Green Supply Chain of Forest Products Initiative Secretariat | 胡帆 Hu Fan | 项目经理 Project Manager |
| CHINA 中国 | 全球林产品绿色供应链倡 议秘书处 中国林业科学研究院林业 科技信息研究所 Global Green Supply Chain | 罗信坚 Luo Xinjian | 秘书长, 副研究员 Secretary General, Associate Researcher |

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| | of Forest Products Initiative Secretariat Research Institute of Forestry Policy and Information, CAF | | |
| CHINA 中国 | 全球林产品绿色供应链倡议秘书处 浙江万里学院 Global Green Supply Chain of Forest Products Initiative Secretariat Zhejiang Wanli University | 王进 Wang Jin | 副教授 Associate Professor |
| CHINA 中国 | 全球见证 Global Witness | 易懿敏 Yi Yimin | 高级顾问 Senior Consultant |
| CHINA 中国 | 加拿大西部林产公司 Western Forest Products Inc. | 陈孙笙 Chen Sunsheng | 中国市场代表 China Market Representative |
| CHINA 中国 | 加蓬林业股份有限公司 (FG SARL) | 窦庆明 Dou Qingming | 董事长 Chairman |
| CHINA 中国 | 加蓬林业股份有限公司 (FG SARL) | 蒋成彬 Jiang Chengbin | 总经理 General Manager |
| CHINA 中国 | 北京林业大学 | 宋林书 | 博士 |
| CHINA 中国 | 北新国际木业有限公司 BNBM Group Forest Products Co., Ltd. | 李玲妹 Li Lingmei | 木材事业部经理 Manager |
| CHINA 中国 | 吉林省河西机械有限责任公司 Jilin Province Hexi Machinery Co., Ltd | 刘洪涛 Liu Hongtao | 经理 Manager |
| CHINA 中国 | 国家林业和草原局 NFGA - National Forestry & Grassland Administration | 苏春雨 Su Chunyu | 总工程师 Chief Engineer (vice administrator) |
| CHINA 中国 | 国家林业和草原局国际合作司 NFGA - National Forestry & Grassland Administration International Cooperation Department | 王春峰 Wang Chunfeng | 副司长 Deputy Director |
| CHINA 中国 | 国家林业和草原局对外合作项目中心 NFGA - National Forestry & Grassland Administration International Cooperation Center | 杨瑗铭 Yang Aiming | 项目官员 Project Officer |

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| CHINA 中国 | 国家林业和草原局林业和草原改革发展司 NFGA - National Forestry & Grassland Administration Forestry & Grassland Reform and Development Department | 刘拓 Liu Tuo | 司长 Director |
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| CHINA 中国 | 圣象集团有限公司 Power Dekor Group Co., Ltd. | 潘震岳 Pan Zhenyue | 供应中心总监 Director of Supply Center |
| CHINA 中国 | 圣象集团有限公司 Power Dekor Group Co., Ltd. | 闻成章 Wenc Chengzhang | 品牌管理部 Brand Management Department |
| CHINA 中国 | 圣象集团有限公司 Power Dekor Group Co., Ltd. | 陈大男 Chen Danan | 总裁助理 President Assistant |
| CHINA 中国 | 圣象集团有限公司 Power Dekor Group Co., Ltd. | 陈晓龙 Chen Xiaolong | 董事长、总裁 Chairman |
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| CHINA 中国 | 安信伟光（上海）木材有限公司 Weiguang Holding Group Limited | 卢奕开 Lu Yikai | 副总裁 Vice President |
| CHINA 中国 | 广西三威林产工业有限公司 Guangxi Sunway Forest Products Industry Co.,ltd | 邓继庆 Deng Jiqing | 副总经理 Deputy General Manager |
| CHINA 中国 | 广西三威林产工业有限公司 Guangxi Sunway Forest Products Industry Co.,ltd | 马路 Ma Lu | 董事长 Chairman |
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| CHINA 中国 | 张家港福人木业有限公司 Zhangjiagang Furen Wood Co. LTD | 陈庆明 Chen Qingming | 董事长 Chairman |
| CHINA 中国 | 张家港红双喜木业 | 沈良蓉 | 经理 |

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| CHINA 中国 | 新浪乐居 | 张弛 | |
| CHINA 中国 | 无锡市新锐工业包装有限公司 Wuxi Sinovel Packing Co., Ltd | 方祖煌 Fang Zuhuang | 董事长 Chairman |
| CHINA 中国 | 柚家木业 | 张雯 | 总经理 |
| CHINA 中国 | 森林趋势 Forest Trends | Naomi Basik Treanor | |
| CHINA 中国 | 森林趋势 Forest Trends | 孙秀芳 Sun Xiufang | Senior policy Analyst 高级政策分析师 |
| CHINA 中国 | 永续全球环境研究所 Global Environmental Institute | 季琳 Ji Lin | 项目发展办常务秘书 Executive secretary |
| CHINA 中国 | 江苏万林现代物流股份有限公司 Jiangsu Wanlin modern logistics Co., Ltd. | 周立波 Zhou Libo | 木材事业部高级总监 Senior Director of Wood Business Department |
| CHINA 中国 | 江苏万林现代物流股份有限公司 Jiangsu Wanlin modern logistics Co., Ltd. | 沈简文 Shen Jianwen | 副总裁 Vice President |
| CHINA 中国 | 江苏万林现代物流股份有限公司 Jiangsu Wanlin modern logistics Co., Ltd. | 黄保忠 Huang Baozhong | 董事长 Chairman |
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| CHINA 中国 | 浙江万里学院 Zhejiang Wanli University | 张新超 Zhang Xinchao | 助理 Assistant |
| CHINA 中国 | 浙江万里学院 Zhejiang Wanli University | 金文玲 Jin Wenling | 助理 Assistant |
| CHINA 中国 | 浙江森林之星文化地板有限公司 Zhejiang Forest Star Culture floor Co., Ltd. | 徐伟 Xu Wei | 董事长 Chairman |
| CHINA 中国 | 浙江菱格木业有限公司 Zhejiang Lingge Wood Industry Co.,Ltd. | 谭宇 Tan Yu | 采购总监 Purchasing Director |

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| CHINA 中国 | 绥芬河市友谊木业（集团）有限公司 Suifenhe Friendship Wood Group Co., Ltd. | 陈桐 Chen Tong | 总经理 General Manager |
| CHINA 中国 | 网易家居 | 黄星星 | |
| CHINA 中国 | 苏州大卫木业有限公司 Suzhou Davie Wood Industry Co., Ltd. | 蒋卫 Jiang Wei | 董事长 Chairman |
| CHINA 中国 | 苏州大卫木业有限公司 Suzhou Davie Wood Industry Co., Ltd. | 龚文明 Gong Wenming | |
| CHINA 中国 | 西藏中林实业发展有限公司 | 孙佳庆 | |
| CHINA 中国 | 西藏中林实业发展有限公司 | 张龙 | |
| CHINA 中国 | 西藏中林实业发展有限公司 | 拜双喜 | 总经理 |
| CHINA 中国 | 西藏中林实业发展有限公司 | 拜学叶 | |
| CHINA 中国 | 西藏中林实业发展有限公司 | 陈超 | |
| CHINA 中国 | 轩麟国际贸易（上海）有限公司 | 张浩 Zhang Hao | 经理 Manager |
| CHINA 中国 | 远东木业刚果（布）有限公司 SOCIETE D'EXPLOITATION FORESTIERE YUAN DONG | 沈超 Shen Chao | |
| CHINA 中国 | 采筑电商 Caizhu E-commerce | 都军 Du Jun | 创始合伙人、总经理 Founder, General Manager |
| CHINA 中国 | 青岛中南洋国际贸易有限公司 Qingdao Zhongnanyang International Trade Co.,Ltd. | 田志敏 Tian Zhimin | 总经理 General Manager |
| CHINA 中国 | 青岛中南洋国际贸易有限公司 Qingdao Zhongnanyang International Trade Co.,Ltd. | 郭剑协 Guo Jianxie | 总经理 General Manager |
| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 余志霄 | 采购经理 |

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| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 刘博 | 采购经理 |
| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 刘喜 | 总监 |
| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 惠中朝 | 总监 |
| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 李晓臣 Li Xiaochen | 国际采购 International Purchase |
| CHINA 中国 | 靖江国林木业有限公司 Jiang Jiang Guo Lin Forest Co., Ltd | 黄瑞翔 | 采购经理 |
| CHINA 中国 | Zoological Society of London | Chen SHU | China Projects Coordinator 中国项目协调员 |
| CÔTE D'IVOIRE 科特迪瓦 | 上海国豪木业有限公司 Shanghai Guohao Wood Co.,Ltd | 蒋宏达 Jiang Hongda | 总经理 General Manager |
| CÔTE D'IVOIRE 科特迪瓦 | SPIB | Boubacar SALAH | PRESIDENT |
| DENMARK | Woodbois Limited | Hongji MOUSTGAARD | Trade Assistant |
| DUBAI | REGALIS FZCO | Paolo Lorenzo BRACCIANO | General Manager |
| FINLAND 芬兰 | EFI - European Forest Institute | Jo Van Brusselen | Senior Researcher 高级研究员 |
| FRANCE 法国 | ATIBT | Benoit JOBBE DUVAL | Directeur Général 总经理 |
| FRANCE 法国 | ATIBT | Manissa TANHCHALEUN | Project Officer 项目官员 |
| FRANCE 法国 | ATIBT | Maylis BORELLI-MASSINES | Coordinatrice adjointe projets 项目协调助理 |
| FRANCE 法国 | ATIBT | Nancy M'CHANGAMA | Administrative and Financial Assistant 行政和财务助理 |
| FRANCE 法国 | ATIBT | Patrick MARTIN | Directeur technique 技术主任 |
| FRANCE 法国 | CIRAD | Alain KARSENTY | Département "Environnements et Sociétés" 环境与社会部 |
| FRANCE 法国 | CIRAD | Sylvie GOURLET-FLEURY | Chercheur, UR "Forêts et Sociétés" |
| FRANCE 法国 | FRANCE TIMBER | Benoit GOMMET | Owner 企业主 |

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|--------------|----------------------------------|---------------------------------|---|
| FRANCE 法国 | FRANCE TIMBER | Lenny WIDJAJA | Direction assistant 指导助理 |
| FRANCE 法国 | French Agency for Development | Christophe du CASTEL | Chef de Projets 项目负责人 |
| FRANCE 法国 | French Agency for Development | Mathieu AUGER SCHWARTZENBERG | Task Team Leader Forest/Rural development 森林和农村发展任务团队 队长 |
| FRANCE 法国 | FRM Ingénierie | Nicolas BAYOL | Ingénieur forestier - Directeur d'études 森林主任 |
| FRANCE 法国 | LE COMMERCE DU BOIS | Arnaud HETROIT | Directeur 经理 |
| FRANCE 法国 | LE COMMERCE DU BOIS | Nicolas PILLET | CSR Manager 企业社会责任经济 |
| FRANCE 法国 | OBBOIS | Marco GARDIN | Chef de projet 项目总监 |
| FRANCE 法国 | OBBOIS | Olivier BONNEAU | Directeur 主任 |
| FRANCE 法国 | OREADE BRECHE | Jean-Paul GRANDJEAN | Directeur Général Associé 总监 |
| FRANCE 法国 | PALLISCO | Michel ROUGERON | Conseiller 使馆参事 |
| FRANCE 法国 | PALLISCO | Shou-Fen WU | ASSISTANTE COMMERCIALE 商务助理 |
| FRANCE 法国 | ROUGIER AFRIQUE INTERNATIONAL | Luc AUGUIN | Directeur Général |
| FRANCE 法国 | ROUGIER AFRIQUE INTERNATIONAL | Zhang Lili | Commerciale 商务员 |
| FRANCE 法国 | STRATEMARK | Bertrand FAUCON | Directeur 主任 |
| FRANCE 法国 | STRATEMARK | Eloïse FAUCON | Welcome Hostess |
| FRANCE 法国 | STRATEMARK | Véronique BEAUFILS | Welcome Hostess |
| FRANCE 法国 | TEREA | Benoît DEMARQUEZ | DIRECTEUR 主任 |
| FRANCE 法国 | TROPICA BOIS | Anne GALLE | Commerciale 商务员 |
| FRANCE 法国 | TROPICA BOIS | Jean-Claude BILLAUD | GERANT 经理 |
| FRANCE | WALE SAS | Emmanuel GROUDEL | Président |

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|-------------|---------------------------------|---------------------------------|--|
| 法国 | | | 总经理 |
| GABON 加蓬 | Ministry of Forest | Marcellin Nziengui | Technical Adviser of the Minister 部长技术顾问 |
| GABON 加蓬 | Gabon Furniture Orginal Zerp | 庆美 | CEO 执行总裁 |
| GABON 加蓬 | Gabon Meables | 石勇华 | CEO 执行总裁 |
| GABON 加蓬 | Gabon Special Economic Zone | Kumas Mohan | General Manager |
| GABON 加蓬 | Gabon Special Economic Zone | Liu Yaling | Marketing Officer |
| GABON 加蓬 | Ministry of Forest | Braddy Jordan Bidaye Mouyama | Photographer- Videographer 摄影录像 |
| GABON 加蓬 | Ministry of Forest | Delphin Mapaga | Deputy General Director of Forests 森林部副主任 |
| GABON 加蓬 | Ministry of Forest | Guilaine Kendjino Omanda | Advisor to the Minister of Forest 加蓬林业部部长顾问 |
| GABON 加蓬 | Ministry of Forest | Natacha Ermence Nssi Bengone | Director 主任 |
| GABON 加蓬 | Ministry of Forest | Pr Lee James Taylor WHITE | Minister 加蓬林业部部长 |
| GABON 加蓬 | Ministry of Forest | Mapangou | Associate |
| GABON 加蓬 | SNBG | Elian | Manager |
| GABON 加蓬 | UFIAG | 庄炳川 Zhuang Bingchuan | 会长 President |
| GABON 加蓬 | UFIAG | 张国华 Zhang Guohua | 创始会长 Founding President |
| GABON 加蓬 | UFIAG | 罗生宇 Luo Shengyu | 秘书长 Secretary General |
| GABON 加蓬 | ATIBT | Jacqueline van de POL | Coordinateur de projets FLEGT et REDD+ 项目协调员 |
| GABON 加蓬 | Bois et Scierie de l'Ogooué | Orderic COUREAU | Directeur Commercial 商务经理 |
| GABON 加蓬 | SBL | Gu Bo | DGA |
| GABON 加蓬 | UFIGA | Françoise van de VEN | Délégué Général 总代表 |
| GABON 加蓬 | UFIGA | Hugues MOUIDY | Référent FLEGT Certification |

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| | | | 森林执法认证 |
| GERMANY 德国 | EFI - European Forest Institute | Jose Bolaños | Communications and event manager 外联与活动经理 |
| GERMANY 德国 | Federal Ministry of Food And Agriculture BMEL | Eva MÜLLER | Director General for Forests 德国农业和食品部林业司司长 |
| GERMANY 德国 | FSC International | Kim Bering Becker Carstensen | Director General 国际执行总监 |
| GERMANY 德国 | GIZ-China | Ralph Ridder | Head, Forest Policy Facility 森林政策主席 |
| GERMANY 德国 | IMM/ITTO | Sarah Storck | FLEGT IMM Lead Consultant 森林执法&国际货币首席顾问 |
| GERMANY 德国 | ETTF European Timber Trade Federation | Thomas GOEBEL | Secretary General 秘书长 |
| GHANA 加纳 | Forest Industry Association of Ghana (FIAG) | Alexander Kingsfred Dadzie | Vice President 副会长 |
| GHANA 加纳 | Forestry Commission | Michael Ofosu | Area Manager 区域经理 |
| GHANA 加纳 | NEPCon | Sandra RAZANAMANDRANTO | Directeur Regional Afrique 非洲地区主任 |
| GHANA 加纳 | Forest Industry Association of Ghana (FIAG) | Kwasi Awuah Agyemang | Executive Member 执行委员 |
| GUYANA 圭亚那 | GMSA/SUPERIOR WOODS | Denishwar Bisessar | Export Manager 出口经理 |
| HOLLAND | Duurzaam Hout BV - Somivab - CCB | John de HAAN | DG |
| INDONESIA 印度尼西亚 | Ministry of Environment and Forestry | Hiras Paimatua Sidabutar | Project Management Advisor 项目管理顾问 |
| INDONESIA 印度尼西亚 | Ministry of Environment and Forestry | Istanto Salim Purwito | Director of Business Management of Production Forests 林产品商务管理主任 |
| INDONESIA 印度尼西亚 | Indonesian Forest Concessionaires Association | Irsyal Yasman | Advisory Board Member 顾问委员会成员 |
| INDONESIA 印度尼西亚 | International Forestry Students' Association (IFSA) | Mahtuf Ikhsan | Liaison Officer 联络主任 |
| INDONESIA 印度尼西亚 | Ministry of environment and Forestry | ISTANTD | DIRECTOR |
| ITALY | FAO | Thaís Linhares-Juvenal | Team Leader of the Forest |

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| 意大利 | | | Governance & Economics 森林治理&经济团队主管 |
| ITALY 意大利 | Alpicam/LES | Andrea BARBAN | Directeur commercial 商务经理 |
| ITALY 意大利 | Alpicam/LES | Brian PENG | Sales Agent 销售代理 |
| ITALY 意大利 | Alpicam/LES | Chin Lung Peng | Sales Agent 销售代理 |
| ITALY 意大利 | Alpicam/LES | Stefano GUIDESE | Directeur commercial 商务经理 |
| ITALY 意大利 | Corà Wood Gabon | Luca FAVARO | Responsable Commercial 商务代表 |
| ITALY 意大利 | Corà Wood Gabon | Luigi CRAPANZANO | Area Manager 区域经理 |
| ITALY 意大利 | EFFE TRADING SRL | Mario FAVINO | DIRECTEUR 主任 |
| ITALY 意大利 | EMERA SRL | Mariacristina SARNO | Commerciale 商务员 |
| ITALY 意大利 | EMERA SRL | Martina GRECO | Responsable Commercial 商务代表 |
| ITALY 意大利 | FAO | Emmanuel HEUSE | Programme FAO UE FLEGT - Coordinateur Afrique 粮农组织非洲协调员 |
| ITALY 意大利 | INDEPENDENT | Olman SERRANO JIMENEZ | Senior Policy Advisor 高级政策顾问 |
| ITALY 意大利 | TRABOIS s.r.l. | Gianfranco BEVILACQUA | GENERAL MANAGER 总经理 |
| ITALY 意大利 | TRABOIS s.r.l. | Guglielmo FORGIONE | COMMERCIALE 商务员 |
| JAPAN 日本 | ITTO | Elsie Yang | Secretary, Division of Forest Management 森林管理部秘书 |
| JAPAN 日本 | ITTO | Gerhard Breulmann | Planning, Monitoring and Evaluation Officer, Division of Operations 操作部计划、检测、评价 官员 |
| JAPAN 日本 | ITTO | Gerhard Dieterle | Executive Director 执行主任 |
| JAPAN 日本 | ITTO | John Leigh | Chairperson of ITTC ITTC 主席 |
| JAPAN 日本 | ITTO | Li Qiang | Systems/Market Analyst, Division of Trade and Industry |

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| | | | 贸易与产业部系统/市场分析员 |
| JAPAN 日本 | ITTO | Naho Tamura | Programme Assistant, Division of Trade and Industry 贸易与产业部项目助理 |
| JAPAN 日本 | ITTO | Ramon Carrillo | Outreach and Communication Officer 外联主任 |
| JAPAN 日本 | ITTO | Sheam Satkuru | Director, Division of Operations 执行部主任 |
| JAPAN 日本 | ITTO | Steven Johnson | Director, Division of Trade and Industry 贸易与产业部主任 |
| JAPAN 日本 | Japan Forest Technology Association | Yuki Nakamura | Consulting Engineer 顾问工程师 |
| JAPAN 日本 | PT. WSL | Lchimiya Takashi | |
| Macao, China 中国澳门 | Macao Trade and Investment Promotion Institute (IPIM) | Gloria Chak | Convention and Exhibition Industry Development Division Manager 公约和会务业务发展部经理 |
| Macao, China 中国澳门 | Macao Trade and Investment Promotion Institute (IPIM) | Sam Lei | Executive Director 执行主任 |
| Macao, China 中国澳门 | Permanent Secretariat of Forum for Economic & Trade Cooperation Between China & Portuguese- Speaking Countries | Rodrigo Manuel Ferreira Brum | Deputy-Secretary-General 副秘书长 |
| MALAYSIA 马来西亚 | Forest Department Sarawak | Phillcaine Anak Pilla | Executive Forester 行政林务官 |
| MALAYSIA 马来西亚 | KTS Group / Sarawak Timber Association | Adeline Lau Kor See | Manager 经理 |
| MALAYSIA 马来西亚 | Malaysia Timber Industry Board | Mohd Nizam Hamid | Deputy Director 副主任 |
| MALAYSIA 马来西亚 | Malaysian Timber Certification Council | Melvin Ku Kin Kin | Senior Executive (Forest Management) 森林管理高级主管 |
| MALAYSIA 马来西亚 | Malaysian Timber Council | Hamidah Abdullah | Director, Strategic Planning Division 战略规划司司长 |
| MALAYSIA 马来西亚 | Malaysian Timber Council | Tan Ting Wai | Regional Head, MTC East Asia 东亚地区主管 |
| MALAYSIA | Ministry of Primary Industries | Noor Ashiqin Binti Hambali | Assistant Secretary |

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| 马来西亚 | | | 助理秘书 |
| MALAYSIA 马来西亚 | Sarawak Timber Association | Annie Ting Yien Ding | Senior Manager 高级经理 |
| MALAYSIA 马来西亚 | Sarawak Timber Association | Mdayria | |
| MALAYSIA 马来西亚 | The Timber Exporter's Association | George Tan Seng Hoe | Advisor 顾问 |
| MALAYSIA 马来西亚 | Hwa Sen Group Company | Lau Swee Nguong | Director 主任 |
| MALAYSIA 马来西亚 | Hwa Sen Group Company | Peter Lau Hui Sing | General Manager 总经理 |
| MALAYSIA 马来西亚 | KTS Group / Sarawak Timber Association | Lau Kor Ping | Manager 经理 |
| MYANMAR 缅甸 | Myanmar Forest Certification Committee (MFCC) | Thawdar Nyein | Technical Officer (Timber Supply Chain) 木材供应链技术主任 |
| PNG 巴布亚新几内亚 | PNG Forest Authority | Joseph Kerowa | Timber & Forest Products Marketing 木材&林产品营销 |
| REPUBLIC DEMOCRATIC OF CONGO 刚果民主共和国 | FIB - Fédération des Industriels du Bois | Eric GITADI | Référent FLEGT Certification 森林执法认证 |
| REPUBLIC DEMOCRATIC OF CONGO 刚果民主共和国 | FIB - Fédération des Industriels du Bois | Gabriel MOLA MOTYA | Président 总经理 |
| REPUBLIC OF CONGO 刚果共和国 | Asia Congo Industries | Tanguy Exaucé SINDOUSS | Homologue Coordonnateur Cellule d'Aménagement ASIA CONGO 刚果-亚洲协调单位 |
| REPUBLIC OF CONGO 刚果共和国 | ATIBT CONGO | Alain Bertin TIOTSOP | Référent FLEGT-Certification ATIBT Congo 森林认证员 |
| REPUBLIC OF CONGO 刚果共和国 | CIB / OLAM - Congolaise Industrielle des Bois | Ashish MALIK | Vice President 副总经理 |
| REPUBLIC OF CONGO 刚果共和国 | CIB / OLAM - Congolaise Industrielle des Bois | Christian SCHWARZ | Directeur Général 总经理 |
| REPUBLIC OF CONGO 刚果共和国 | CIB / OLAM - Congolaise Industrielle des Bois | Vincent ISTACE | Corporate Responsibility & Sustainability 企业责任和可持续发展协调员 |

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| REPUBLIC OF CONGO 刚果共和国 | LIBOUALA TIMBER | Velinova Elle Brille BOBILA | |
| REPUBLIC OF CONGO 刚果共和国 | Ministère de l'Economie Forestière de la République du Congo | Paulette EBINA-TARAGANZO | Directrice de la Valorisation des Ressources Forestières 森林资源评估主任 |
| REPUBLIC OF CONGO 刚果共和国 | Ministère de l'Economie Forestière de la République du Congo | Pierre TATY | Directeur de Cabinet 主任 |
| REPUBLIC OF CONGO 刚果共和国 | SCPFE | Serge MOMBOULI | Directeur 主任 |
| REPUBLIC OF CONGO 刚果共和国 | Taman Industries | Georges MOUKILOU | Homologue- Coordonnateur de la Cellule d'Aménagement de Taman-Industries Ltd 公司规划小组协调员 |
| REPUBLIC OF CONGO 刚果共和国 | THANRY CONGO / VICWOOD | Ferdinand SAHA | Coordonnateur CA 协调员 |
| REPUBLIC OF CONGO 刚果共和国 | UNIBOIS / AFRIWOOD INDUSTRIE / SFIB | Armand Blaise DIAMVINZA | DIRECTEUR ADMINISTRATIF 行政主任 |
| RUSSIA 俄罗斯 | BOIS ROUGE The Central African Republic, Gobongo, Kakamagoulou Tropical timber | Artem TOLMACHEV | Sales Manager |
| SPAIN 西班牙 | EFI - European Forest Institute | Laurent Cerbonney | Forest Governance Practitioner 森林管理实践员 |
| SPAIN 西班牙 | INVOICEGREEN TIMBER TRADING SL | Abel GUILLEN | GENERAL MANAGER 总经理 |
| SWITZERLAND 瑞士 | ATIBT | Robert HUNINK | President 会长 |
| SWITZERLAND 瑞士 | CIB / OLAM - Congolaise Industrielle des Bois | Jan Willem HUNINK | Vice President 副总经理 |
| SWITZERLAND 瑞士 | InSpire Strategy and Decision | Claude GARCIA | Facilitateur |
| SWITZERLAND 瑞士 | InSpire Strategy and Decision | Sylvain MAZAS | Illustrateur |
| SWITZERLAND 瑞士 | INTERHOLCO AG | Christian MORGENROTH | Vice President Trading 贸易副总经理 |
| SWITZERLAND 瑞士 | INTERHOLCO AG | Christophe JANSSEN | Vice President Sales & Production 销售&生产副总经理 |

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| SWITZERLAND 瑞士 | PEFC China | Baisong YU | Director 主任 |
| SWITZERLAND 瑞士 | PEFC International | Thomas SEYVET | Junior Development Officer 中级发展官员 |
| SWITZERLAND 瑞士 | PRECIOUS WOODS | Stephane GLANNAZ | CCO 首席内容官 |
| TAIWAN, CHINA 中国台湾 | International Forestry Students' Association (IFSA) | Yu-Tung Hung | Regional Representative for Asia Pacific 亚太区域代表 |
| THAILAND 泰国 | Private-owned Farming | Kingpai | Owner 企业主 |
| THAILAND 泰国 | FAO - Regional Office for Asia and the Pacific | Ben VICKERS | Regional Programme Officer (REDD+) |
| THE NETHERLANDS 荷兰 | Private-owned Natural Rubber Farm and Agroforestry Farm | Kingpai Koosakulnirund | Business Owner 企业主 |
| THE NETHERLANDS 荷兰 | FSC Nederland | Bernard Abraham ROMEIN | Manager FSC Network |
| THE NETHERLANDS 荷兰 | IDH - The Sustainable Trade Initiative | Chih-Ching LAN | Program Officer - Markets 市场项目官员 |
| UNITED KINGDOM 英国 | Timber Trade Federation | 马潇 | Sustainability Manager |
| UNITED KINGDOM 英国 | BVRio | Grace BLACKHAM | Programme Manager - Forestry & Timber Markets 森林&木材市场项目经理 |
| UNITED KINGDOM 英国 | ClientEarth | Tanja VENISNIK | Law and Policy Advisor 法律与政策顾问 |
| UNITED KINGDOM 英国 | EDOARDO GIVONE | Edoardo GIVONE | TRADER 贸易员 |
| UNITED KINGDOM 英国 | Global Timber Forum | Rachel BUTLER | Executive Director 执行主任 |
| UNITED KINGDOM 英国 | James Latham PLC | Peter LATHAM | Director 主任 |
| UNITED KINGDOM 英国 | Woodbois Limited | Paul DOLAN | CEO 执行总裁 |
| UNITED KINGDOM | Forest Industries Intelligence Limited | Rupert Oliver | IMM Consultant IMM顾问 |

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| 英国 | | | |
| USA 美国 | Floor & Décor | Peter Zhang | Category Manager 品类经理 |
| USA 美国 | United States Department of State | Luke David Thompson | Foreign Affairs Officer 外事专员 |
| USA 美国 | World Resources Institute | Bo LI | Research Associate 副研究员 |
| VIETNAM 越南 | Vietnam Timber & Forest Products Association (VIFORES) | Ngo Sy Hoai | Vice Secretary General 副秘书长 |
| VIETNAM 越南 | World Resources Institute | Marie VALLEE | Manager OTP 经理 |
| 加蓬 | 加蓬蓝莲物流有限公司 | 冯江 | 总经理 |
| | SMB Kenzai Co., Ltd. | SUZUKI TAKAFUMI | General Manager |
| | SMB Kenzai Co., Ltd. | 王春喜 | |