



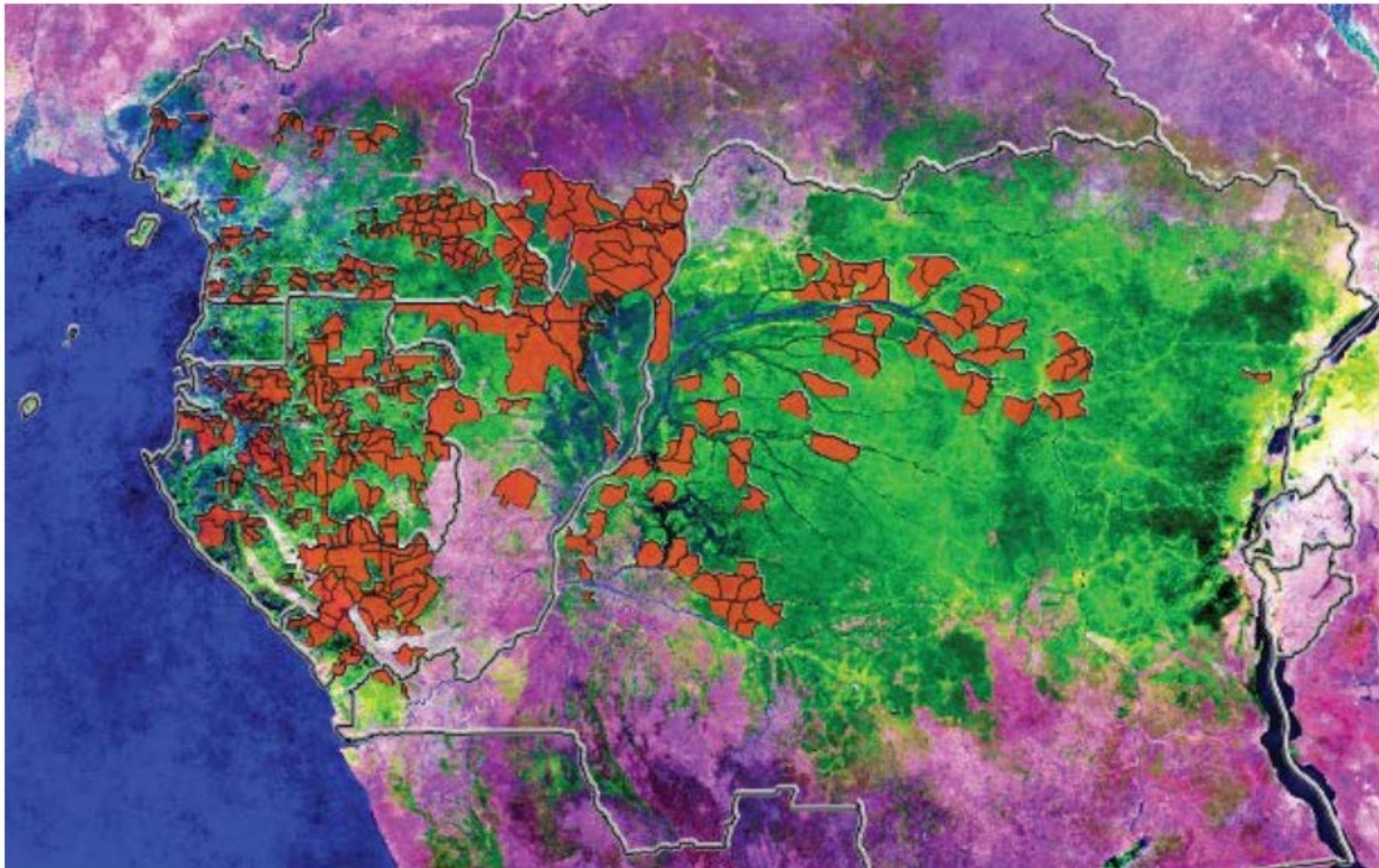
The forest and wood sector in West and central Africa

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Forest concessions in central Africa



Source:
FAO,
2016



Forest concessions

	Forest concession area		Concessions with management plan		FM certification			Legality verification			Total [ha]	%
	Area [ha]	Nr	Area [ha]	%	FSC FM [ha]	PEFC [ha]	%	OLB / BV [ha]	FLV / RA [ha]	FSC / CW [ha]		
Cameroon	7,058,958	111	5,071,000	72	411,976		6	2,759,872	40,992	359,060	3,159,924	45
Congo	12,600,221	51	4,671,691	37	2,410,693		19	852,820	1,696,211	669,589	3,218,620	26
Gabon	14,272,630	150	7,181,420	50	2,042,616	596,822						
Equatorial Guinea	740,000	48										
CAR	3,058,937	11	3,058,937	100								
DRC	12184130	80	0	0								
Liberia	772,740	10	265,000	34								
Ghana	3,009,632	60	767,000	26								
Cote d'Ivoire	700,000	380	436,000	62				1,204,198			1,204,198	
TOTAL	54,397,248	901	21,451,048	44	4,865,285	596,822	9	4,816,890	1,737,203	1,028,649	7582742	14

Source: FAO, 2016; FSC, 2018; OLB, 2018; FLV, 2018; ATIBT, 2018



Forest management and wood harvest

- Forest concessions are mostly publicly tendered with logging rights for a duration of 25 to 30 years.
- It is a legal requirement to prepare and implement a forest management plan within the 3 first years of operating a concession.
- Logging is highly selective due to long distance to ports of export.
- Annual wood harvest: Formal sector ca. 10 M m³ round wood. Informal sector ca. 10 M m³ of which about 20-25 % go in export.
- Forest and wood industry is the largest employer after the public sector. 135,000 jobs in formal sector, same in informal sector.
- Problems with regeneration of commercial species in 2nd and 3rd rotation. Yet no post harvesting silviculture treatments.
- Trend: European industry is pulling out. Asian industry is moving in.



Reliability of forest management

- Forestry laws in West and central Africa are reasonably good but only 44 % of forest concessions have a management plan. Yet most FMPs are only partially or not at all implemented.
- Less than 23 % of all forest concessions are fully legal.
 - 9 % are FM certified (FSC and PEFC) with social responsibilities: contribute to maintain public roads, schools, medical supplies, wells, electricity, village projects, etc.
 - 14 % are legality verified (OLB / FLV / FSC-CW).
- Estimation: 30-70 % of all forest concessions are not fully complying with the law. Mainly due to poor law enforcement and wide spread corruption.
- Huge “informal sector” which is poorly governed.



FLEGT and “Voluntary Partnership Agreements”

VPA situation						
	Cameroon	Congo	CAR	Gabon	DRC	Côte d'Ivoire
Status	In effect	In effect	In effect	Under negotiation	Under negotiation	Under negotiation
Signature	6 October 2010	17 May 2010	21 December 2010	NA	NA	NA
Ratification	9 August 2011	July	23 November 2011	NA	NA	NA
Implementation	1 December 2011	1 March 2013	1 July 2012	NA	NA	NA
Situation	Preparation for implementation	Preparation for implementation	Preparation for implementation	Negotiation underway since Sept. 2010	Negotiation underway since Oct. 2011	Negotiation underway since Feb. 2013

Source: ATIBT, 2018



Wood processing

- During many decades wood was exported from African countries as unprocessed round wood. Meanwhile most countries have full or partial log export bans to foster local wood processing.
- Wood processing is mainly limited to plywood, sawn wood and some finger jointed wood. Most saw mills are rather dated and operate with a processing efficiency between 20 to 40 %.
- Use of cogeneration for running saw mills and kiln drying is not yet widely established.
- African governments highly welcome investments in increasing processing capacity. Yet log export bans did not lead to more productivity nor to more employment.



Key stakeholders for timber industry

- **Producer governments:** Forestry law, labor law, taxation, poor law enforcement, infrastructure, customs.
- **ATIBT (association technique internationale des bois tropicaux):** Defending legal and certified industry interests.
- **Service industry:** Forest management expertise, legality verification, forest certification, transporters, communication.
- **Timber markets:** Absorbing wood based on price, quality, legality / sustainability standards and specific legislation, e.g. EUTR, public procurement policies.
- **Academia:** Increase knowledge. Credible research can protect industry against allegations.
- **NGOs:** Managed to massively reduce tropical wood imports into Europe by influencing public opinion and spreading information about industry practices and corruption. Work with industry on wildlife conservation.
- **Donors and development banks:** Funding for support projects.



Timber trade

- Wood consumption in Africa is steadily increasing.
- European tropical wood market shrank massively during the last 10 years and has no more influence on wood production.
- Wood export to Asia, especially to China, is growing.
- The Chinese tropical wood market has the market power to influence timber harvesting practices and compliance with producer country laws.
- **Key question:** Are MOFCOM, Chinese wood importers and Chinese processing industry ready to use their market power towards increasing the offer of legally and sustainably produced wood in Africa and elsewhere?



Increasing the legal wood offer in Africa and fostering legal wood imports into China

Voluntary actions have little impact because there is no control. Neither have laws any impact if there is no law enforcement.

Some examples to spur thinking about possible next steps:

- African producer governments prepare and implement a law that requires timber producers to execute third party legality verification. The case of Congo Brazzaville.
- China prepares and implements a public procurement policy that prescribes the use of legally / sustainably produced wood.
- China prepares and implements a law that is limiting wood imports to legally produced wood and wood products.



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