



## Domestic timber markets: An overview

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# Harvest



# "Skidding"



# Processing





# Carrying



# Transport





# Distribution (road)

GAROUA-BOULAÏ	238
BANGUI	833
NGAOUNDERE	505
MOUNDOU <small>TEXAS</small>	899
NDJAMENA	1267



# Distribution (rail)...

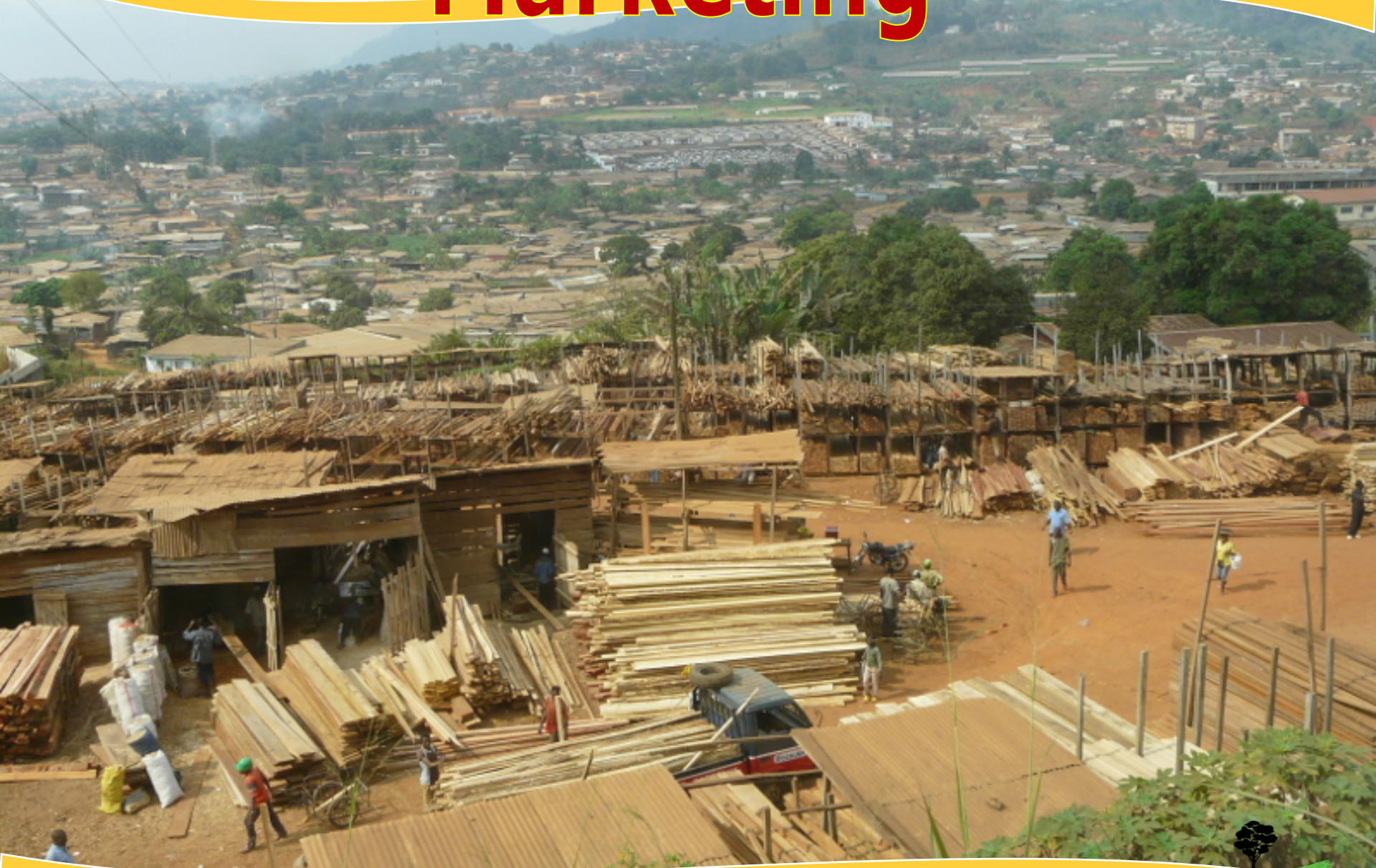




# Distribution (river)



# "Marketing"



# Consumption



# What is « domestic » timber?

- Lumber (sawnwood, logs)

	National Production		Imports	
	Industrial	small-scale	Industrial	small-scale
Consumption	x	<b>X</b>	x	x
Exports	<b>X</b>	<b>X</b>	<b>X</b>	x

- Different sources:

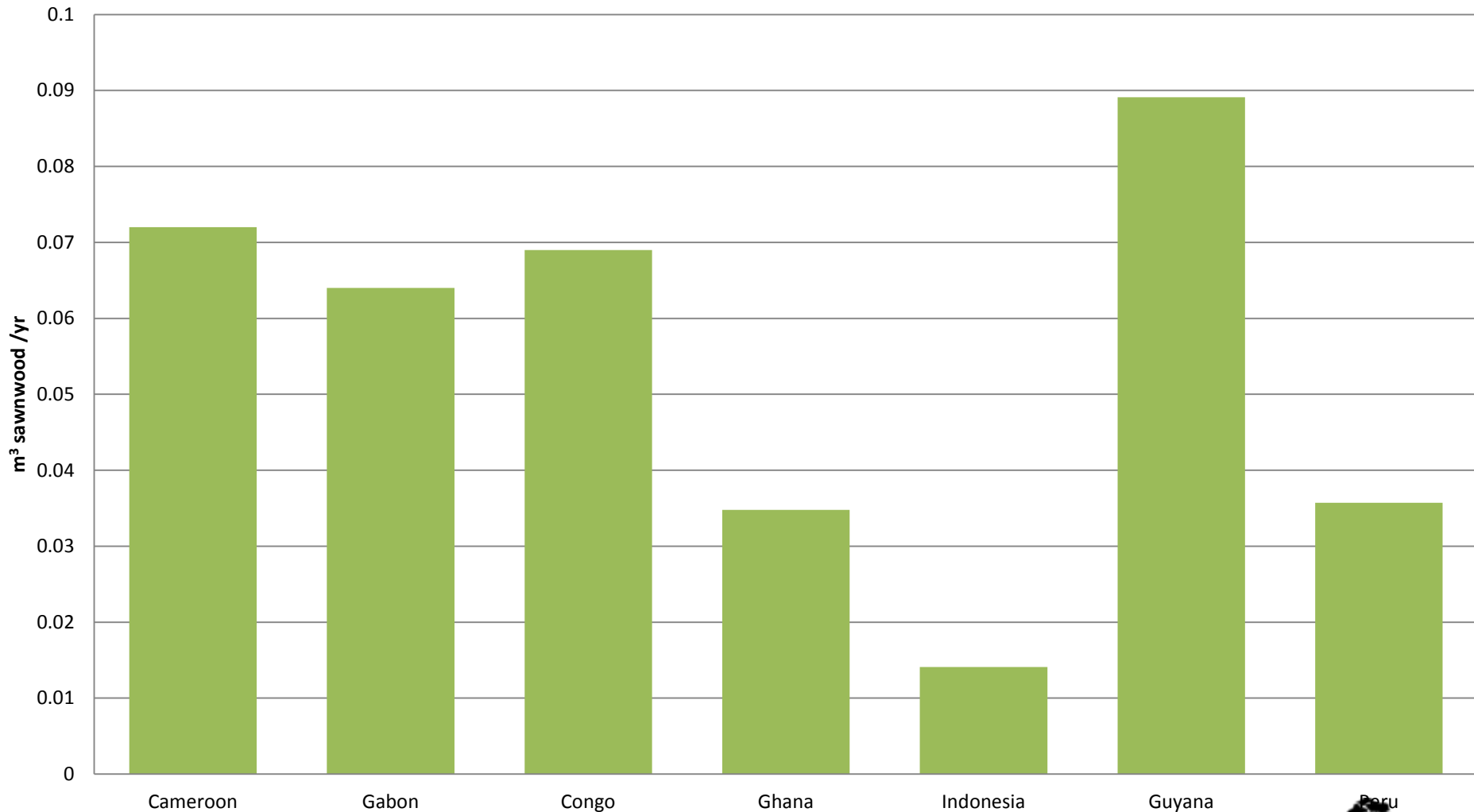
- Industrial scraps (not processed with chainsaw)
- Small-scale logging titles (harvested with chainsaws, mobile saws,...)
- Informal small-scale harvesting

# Who is concerned?

- Several groups of citizens:
  - At the local level: customary owners, chainsaw millers and their teams, administrations, local governments
  - Along the chain (« on the road »): road hauliers, administration (*corps habillés*)
  - At the market level (generally urban): traders, buyers, administrations, local governments

# Who is asking for domestic timber ?

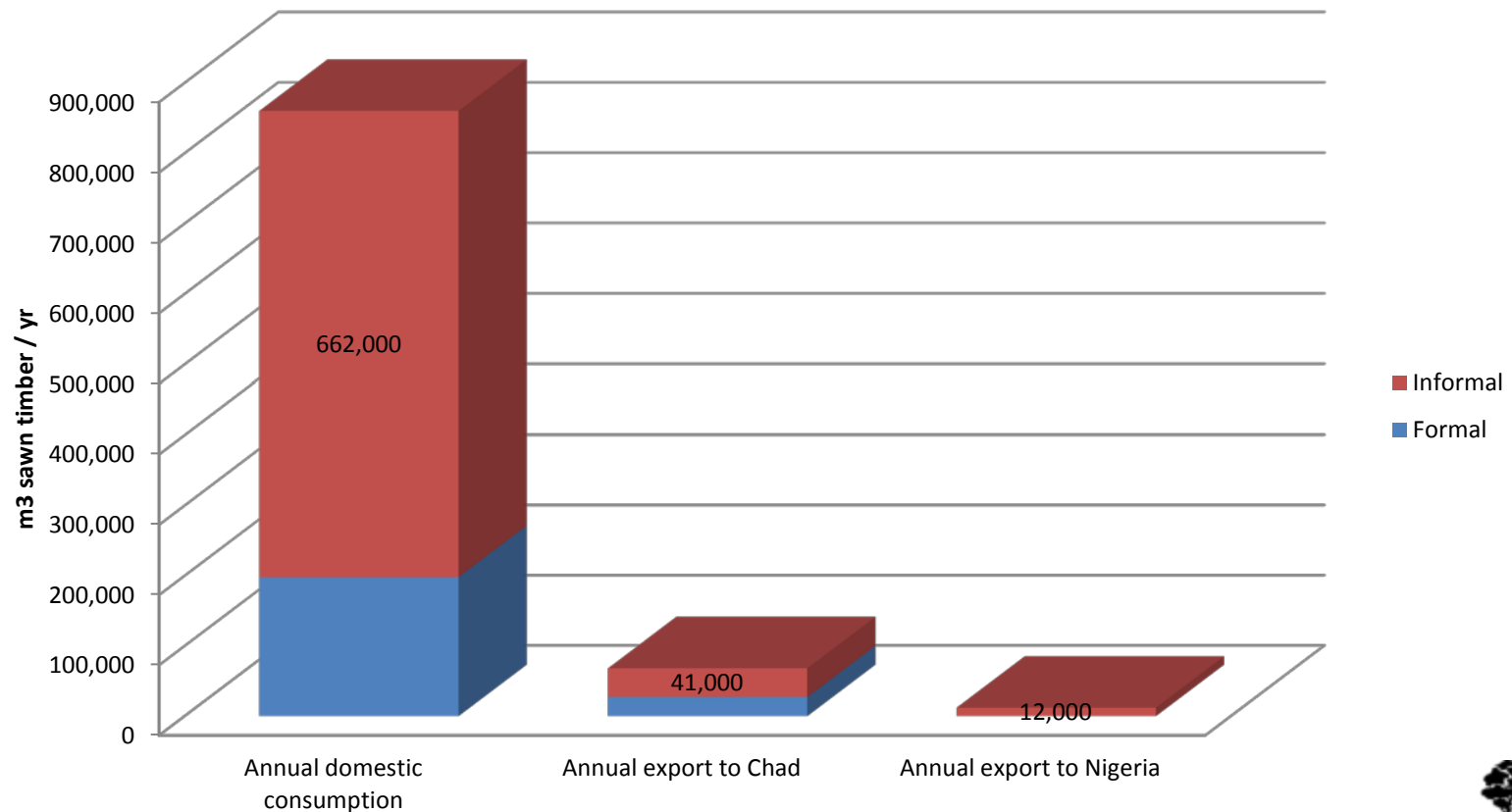
Annual domestic consumption per capita



(Source: ETFRN News 52, December 2010)

# Who is asking for domestic timber ?

- A national private demand
- A foreign demand: Cameroon → Chad & Nigeria

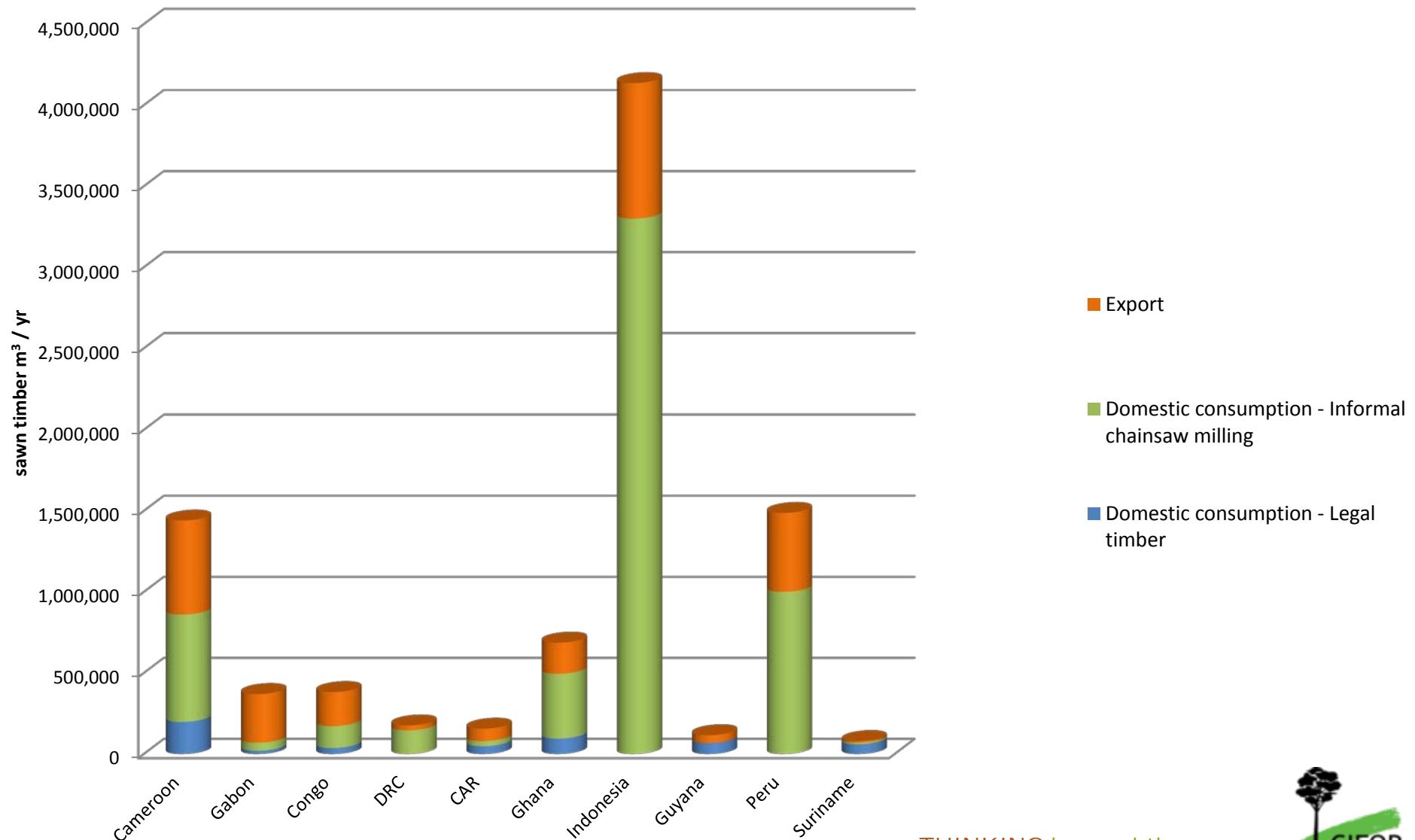


# Who is asking for domestic timber ?

- A national private demand
- A foreign private demand
- A public demand, but usually without a clear public procurement strategy in favor of legal timber



# Domestic sawn timber: Volumes



(Source: ETRN News 52, December 2010)

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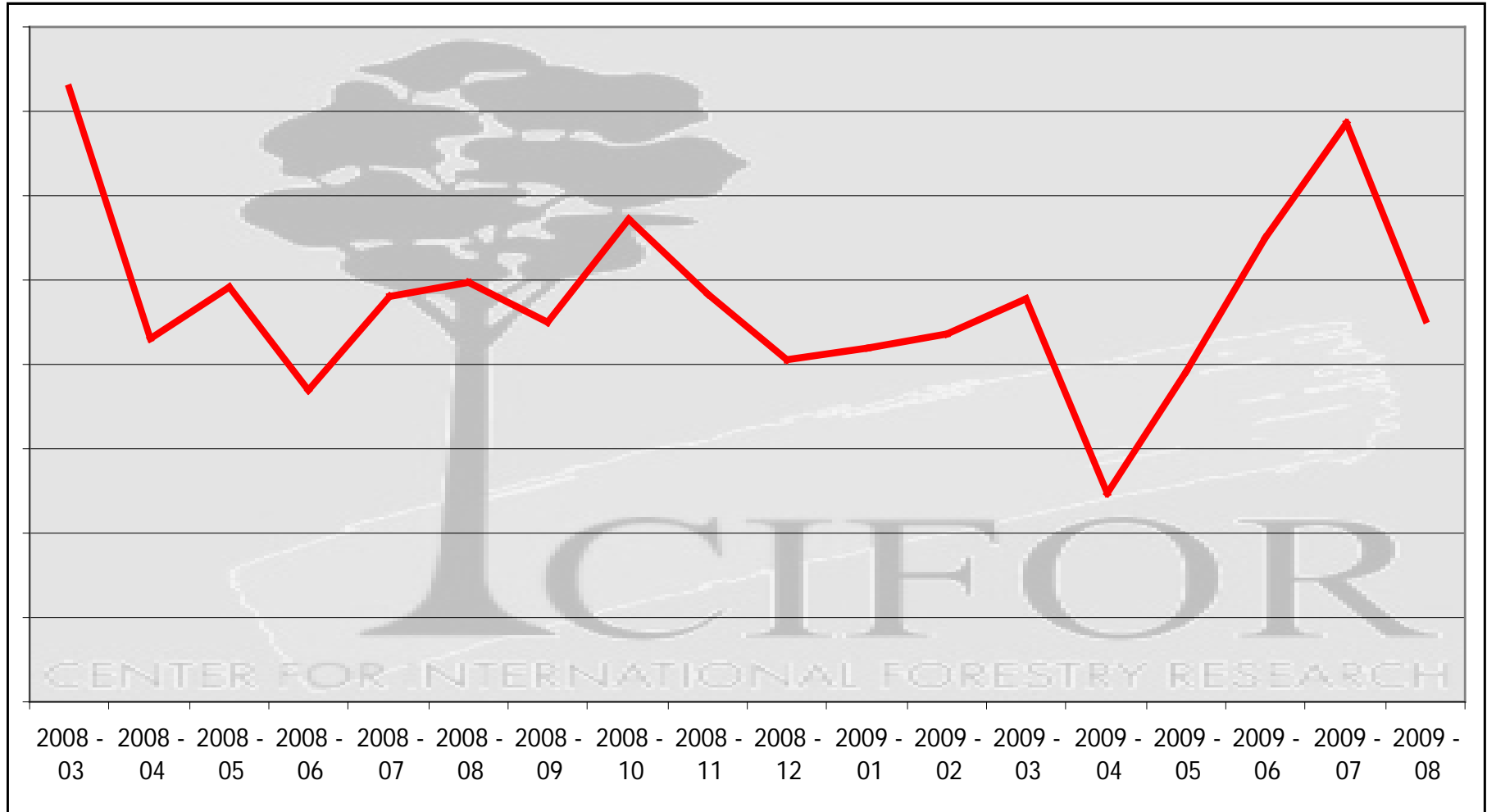
# Organization of domestic timber markets

- Many selling points
  - Dedicated markets or hardware stores
  - Recognized by the public authorities
  - Trade Unions, Syndicates, Associations,...
- A significant sector, very well organised
- Domestic timber market will not be easily entered by logging companies or other forms of legal timber production

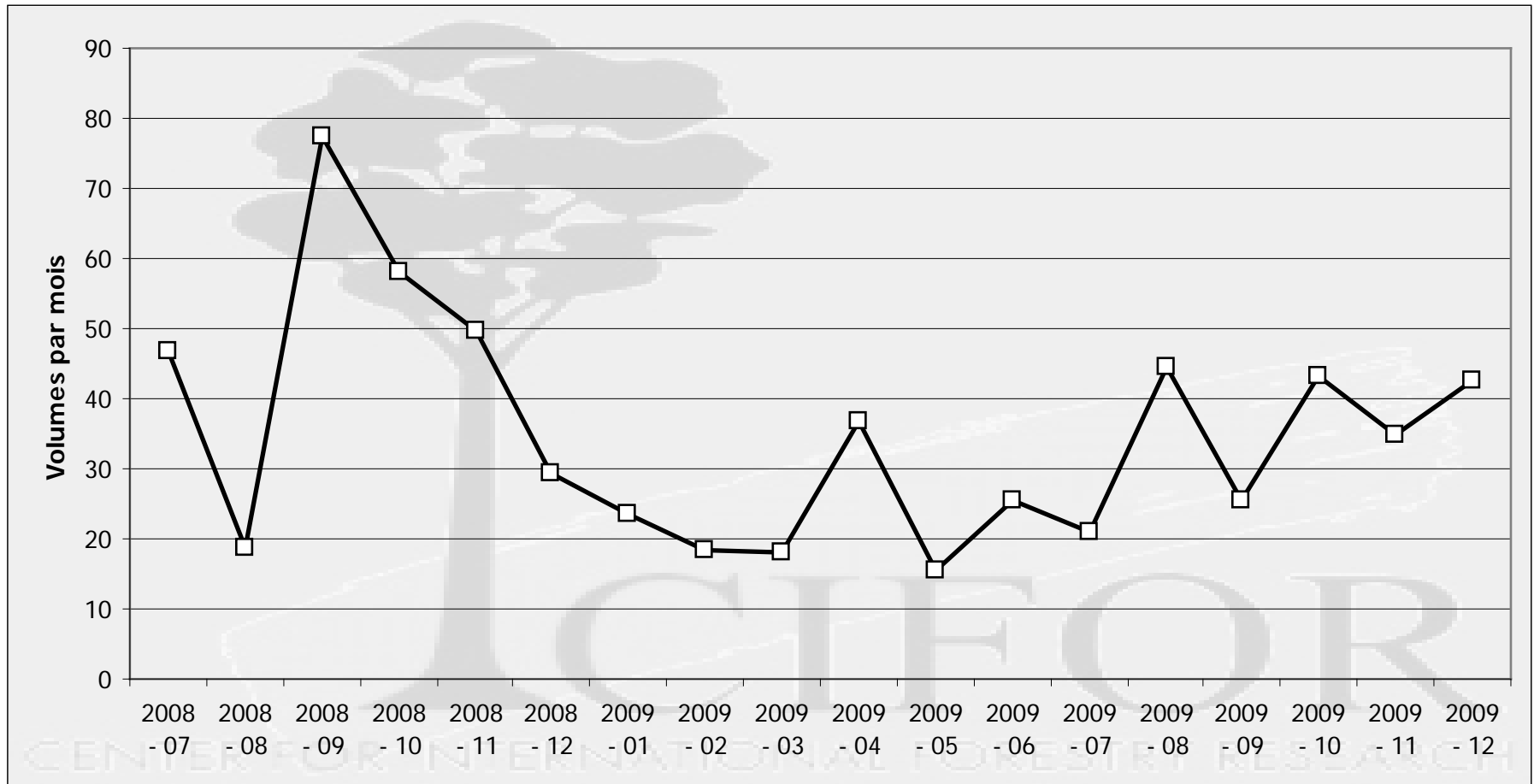
Country/city	# sale points
Cameroon (Yde, Dla, Brta)	882
Congo (Pte Noire)	127
Gabon (Lbv)	210
DRC (Kin)	170
CAR (Bangui)	140



# Intra-annual seasonal fluctuations (Yaounde)



# Inter-annual seasonal fluctuations (Libreville)



# Upstreaming the domestic timber sector

## Operating ways and socio- economic impacts

# All you need to become a chainsaw miller



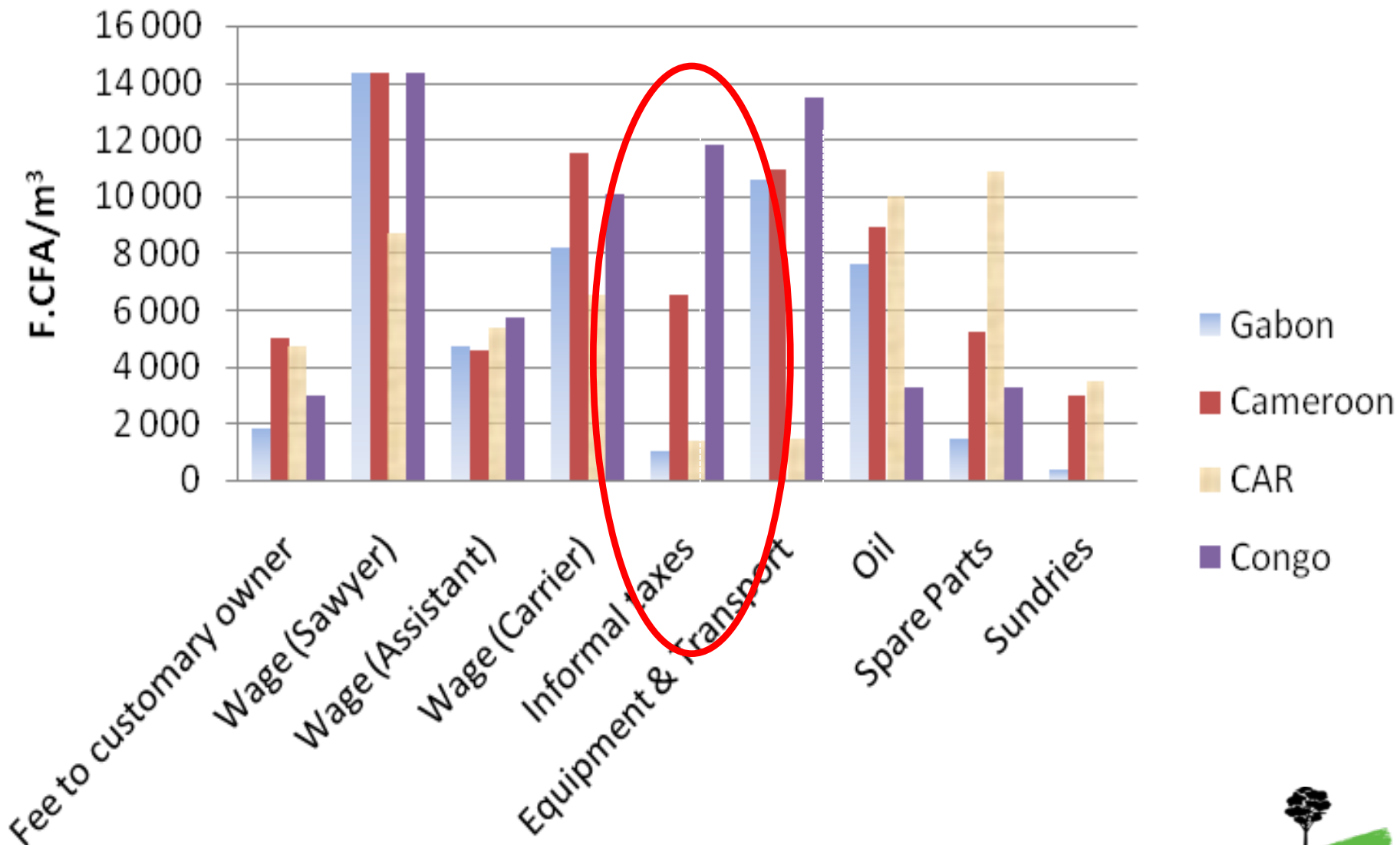
Kenya



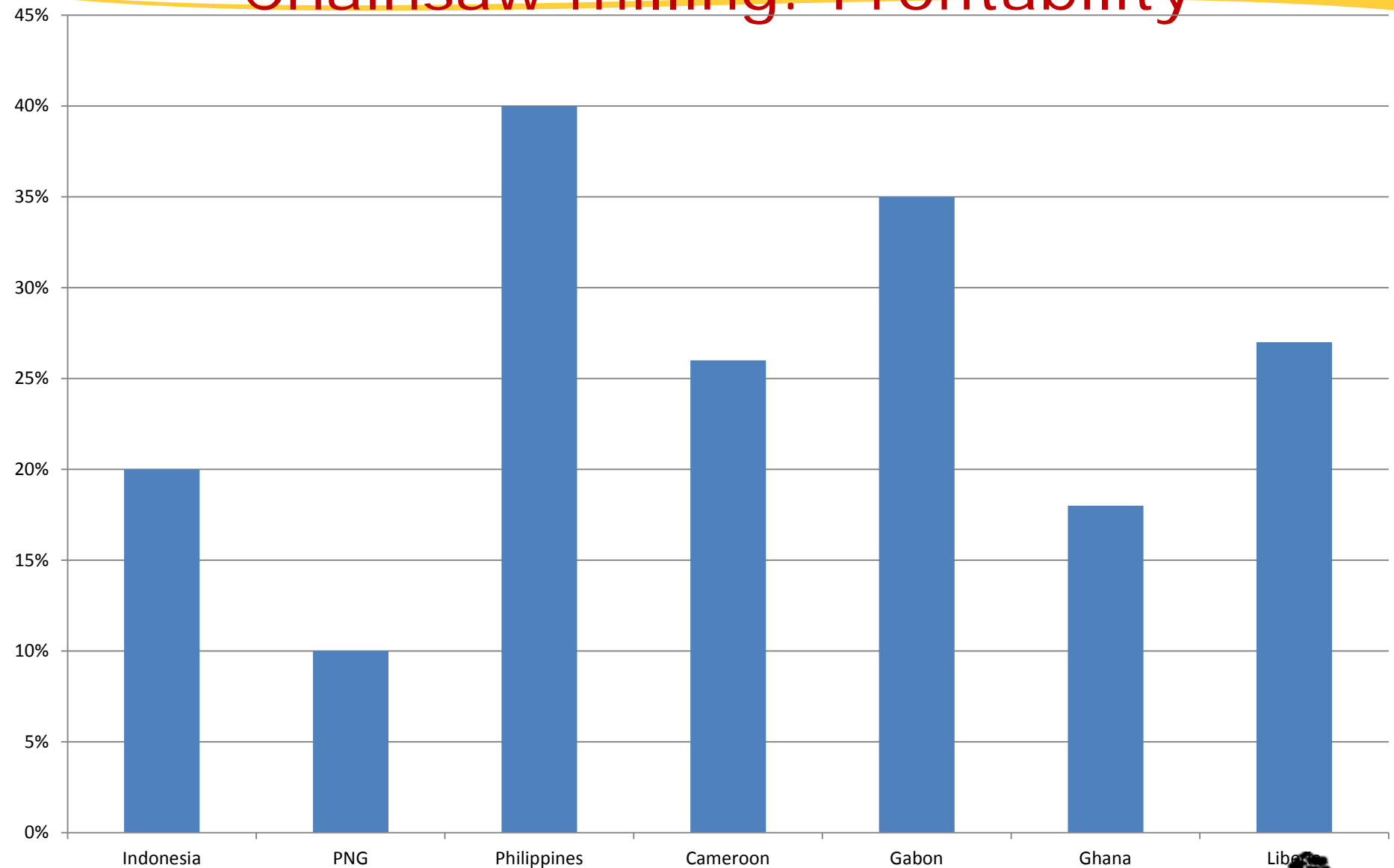
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# Chainsaw milling: Costs distribution



# Chainsaw milling: Profitability



(Source: ETRN News 52, December 2010)

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# Global economic impact

- Much employment in rural and urban areas

country	estimated employment
Cameroon	45,000
Ghana	97,000
Guyana	8,000
Liberia	1,500–3,850

(Source: ETFRN News 52, December 2010)

- Formal and informal revenues: a real contribution to livelihoods

Beneficiaries (Cameroon)	Sources of revenue	Amount (US\$/yr)
Rural populations	Wages; sale of trees; profits	40 million
Urban populations	Wages; outlets' rent; profits	23 million
Administration representatives	Informal payments	14 million
Council	Tax	1 million

- Taxes: a significant loss for the State and the local governments

country	lost stumpage revenue (US\$)
Cameroon	13.1 million
Gabon	2.4 million
Ghana	18.0 million
Liberia	18.0–42.0 million

(Source: ETFRN News 52, December 2010)

Secure, legalise, perpetuate  
the domestic timber sector

Food for thoughts

(with a Central African bias)

# Demand side interventions

- Increase the domestic demand for legal (but more expensive) timber
- A private demand influenced by the price level instead of quality/legality/sustainability of timber
- Greening the (domestic) demand mainly through public procurements



# Increasing legal timber supply

- Revision of the forest law
  - Facilitate access of chainsaw millers to small-scale logging permits
  - Promote partnership between industrial (legal, certified) companies and small-scale loggers
- Extend timber plantations
- Reduce the costs of legal production of sawing to reduce the price difference with informal sawn timber
- Improve the concrete enforcement of the forest law
  - Discussion and negotiation platforms at the national scale
  - Real sanctions against corrupted forest officers at all level
  - Economic incentives: financial compensation to decrease corruption (performance-based payment)

# brief

project

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[www.cifor.cgiar.org](http://www.cifor.cgiar.org)



## of CIFOR-CARO

Regional Workshop on Chainsaw Lumbering in West Africa

Within the framework of the project:  
'Developing alternatives for illegal'

This and other publications from the Pro-Formal project can be found at [www.cifor.cgiar.org/pro-formal](http://www.cifor.cgiar.org/pro-formal)



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## Cameroon's hidden harvest

The trade in illegally harvested timber provides a living for more than 45,000 people, a major source of income for corrupt officials and not a cent for the state.

Charlie Pye-Smith





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