CROSS-BORDER FLOWS OF TIMBER AND WOOD PRODUCTS IN WEST AFRICA

EUROPEAN COMMISSION

Contract Reference: 2007/146818

FINAL REPORT

Hugh Blackett & Dr. Eric Gardette, HTSPE Ltd

20 October 2008

Contents

Tables

Figures

Maps

"This document has been produced with the financial assistance of the European Union. The contents of this document are the sole responsibility of the HTSPE Ltd and can under no circumstances be regarded as reflecting the position of the European Union."

Abbreviations

AAC	Annual allowable cut
ACOTIDA	Agricultural & Community Timber Development Association (Sierra Leone)
ATO	African Timber Organization (see also OAB)
BCE	Bureau of Customs & Excise (Liberia)
CEPS	Customs Excise & Preventative Service (Ghana)
CFZ	*Centre Forestier de Nzérékoré* (Guinea Conakry)
COC	Chain-of-Custody
DEPE	*Direction de l'Evaluation, de la Programmation et des Etudes* (Ivory Coast)
DFID	Department for International Development (UK)
DGFRN	*Direction de la Conservation et de la Promotion des Ressources Naturelles* (Benin)
DISA	*Direction de l'Informatique, des Statistiques et des Archives* (Ivory Coast)
DPIF	*Direction de la Production et des Industries Forestières* (Ivory Coast)
EC	European Commission
ECOWAS	Economic Community of West African States
EPA	Economic Partnership Agreement
EPIC	*Etablissement Public de Caractère Industriel et Commercial* (Guinea Conakry)
CFA	Currency of Francophone Africa
FDA	Forest Development Authority (Liberia)
FDF	Federal Department of Forestry (Nigeria)
FLEGT	Forest Law Enforcement Governance & Trade
FSC	Forest Stewardship Council
FSD	Forest Services Division (Ghana)
GFTN	Ghana Forest Trade Network
ICCO	Interchurch organization for development cooperation
ITTO	International Tropical Timber Organization
IUCN	International Union for Conservation of Nature
LAS	Legality Assurance Scheme
LMCC	Log Measurement and Conveyance Certificate (Ghana)
MAFFS	Ministry of Agriculture, Forestry & Food Security (Sierra Leone)
MINEEF	*Ministère de l'Environnement, des Eaux et Forêts* (Ivory Coast)
NaCEF	National Commission of Environment and Forestry (Sierra Leone)
NCS	Nigeria Customs Service
NGO	Non-governmental Organization
OAB	*Organisation Africaine du Bois*
ODEF	*Office d'Exploitation des Forêts* (Togo)
OGUIB	*Office Guinéen des Industries du Bois*
ONAB	*Office National du Bois* (Benin)
ONUB	*Office National des Usagers du Bois du Bénin*
PEF	*Perimètre d'Exploitation Forestière* (Ivory Coast)
PEFC	Programme for the Endorsement of Forest Certification schemes
PGRF	*Project de Gestion des Ressources Forestières* (Guinea Conakry)
SAMFU	Save My Future Foundation (Liberia)
SODEFOR	*Société de Développement des Forêts* (Ivory Coast)
SPIB	*Syndicat des Producteurs Industriels du Bois* (Ivory Coast)
SYGUCE	*Système de Guichet Unique pour le Commerce Extérieur* (Benin)
TIDD	Timber Industry Development Division (Ghana)
TIF	Timber Information Form (Ghana)
UN	United Nations
VPA	Voluntary Partnership Agreement
WWF	Worldwide Fund for Nature

Summary (English)

Recognizing that regional and cross-border timber trade may have important implications for the FLEGT Partnership Agreements designed to combat illegal trade, HTSPE UK was engaged to investigate issues that may impact on the negotiating process, and particularly cross-border flows of timber and timber products, border control procedures and timber traceability systems in place throughout the region. The countries included in the study were Benin, Ghana, Guinea Conakry, Ivory Coast, Liberia, Nigeria, Sierra Leone and Togo.

Forest loss and degradation throughout West Africa is considerable. The FAO (2006) estimates that the countries concerned have lost, on average, 20.7% of forest cover during the 15 years from 1990 to 2005. The level of degradation is unknown, but must be considerable as a result of excessive harvesting and charcoal production. Industrial processing capacity that exceeds forest productivity and local and regional demand for timber and timber products is driving the destruction and degradation. There is intense competition for resources and general shortages of supply have resulted in factory closures and the decline of forest industries that were heavily focused on primary production and rarely developed any capacity for value added processing.

Professional forest management is hardly practised in the region. Lack of resources is an obvious problem, but of crucial importance, Governments' of the region appear to have little interest or capacity to enforce forestry legislation and to control harvesting. The problem is compounded by systemic corruption among government officials who are often in collusion with loggers and timber traders operating outside the law.

The allocation of logging concessions to large companies has been abandoned in some countries. It is uncertain if attempts in other countries to modify the procedures to improve control and increase revenue are going to be successful. In an atmosphere of confusion and weak law enforcement, uncontrolled and illegal chainsaw logging has proliferated. Trees are wastefully processed in-situ to produce rough-sawn planks that meet local and regional market demand and are also processed for export.

There is growing support for the idea that community resource management may be the better way to achieve legal and sustainable forestry, but there are many examples of communities being involved in illegal practices and destruction. Many NGOs are involved in development of community based forestry, but the long term success would appear to be dependent on equitable rights and procedures that are enforceable by the forest authority.

In response to political pressure to maintain or increase revenue the major focus of forest authorities is collection of fees, but with much of the harvesting being uncontrolled and illegal, formal procedures for collecting royalties and other forest fees do not exist. Instead, the common practice throughout the region is to collect fees for transport of timber regardless of whether it has been legally harvested. In this way logging is given quasi-legal status, but even where fees are collected, they are derisory and there is much leakage through the corrupt practices that are common throughout the region.

There is little control of timber movement across borders within the region and to countries of the Sahel. Much of the trade is informal, weakly regulated and allowed to operate in disregard of the illegal origin of much of the raw material. Despite customs controls the illicit trade continues apparently with the significant collusion of forestry, police and customs authorities. Regional trade identified includes:

- Sawn-timber from Ivory Coast & Ghana to the Sahel
- Logs and sawn-timber from Cameroon to northern Nigerian states
- Plywood from Ghana to Benin, Nigeria & Togo
- Sawn-timber from Guinea Conakry & Liberia to Ivory Coast
- Sawn-timber from Sierra Leone to Guinea Conakry
- Sawn-timber from Ghana & Nigeria to Benin & Togo.

In addition to the regional trade, Ivory Coast and Ghana still export substantial volumes to Europe. Everywhere there is growing demand from India for teak and China for logs or rough-sawn lumber. Indian and Chinese buyers were widely rumoured to be complicit in illegal activities.

FLEGT is a process that offers hope as there is a desire in the main timber exporting countries, by fulfilling the terms required by the EC, to maintain timber trade with Europe. The negotiating process has widened the scope of involvement and given voice to increasingly sophisticated NGOs, which can play an important role in forcing governments to take unpalatable actions such as industrial downsizing. Timber trade associations are also emerging as a possible force for change, particularly in preventing illegal export which undermines their local business. The political strength of the EC provides an opportunity for wider cooperation on the issue of illegal trade with regional governments and, crucially, should strive for the cooperation with India and China.

Regionally, far better statistics covering all trade, local and international are essential so that governments can match production to resource potential and determine how local demand can be met and what volume of external trade is permissible. The overriding requirements for success are improved enforcement and a clamp down on corrupt practices.

Résumé (French)

1 Introduction

La Commission Européenne (CE) est en train de négocier des accords de partenariat volontaire (APV) avec le Ghana dans le cadre du programme 'applications de règlementations forestières, gouvernance et échanges commerciaux' (FLEGT) et doit commencer des négociations avec d'autres pays d'Afrique de l'ouest comme le Libéria. Dans le cadre de ce programme, les importations de bois avec l'UE doivent provenir de sources légales. La suppression du commerce illégal du bois et de l'exploitation incontrôlée des forêts est un préalable indispensable pour atteindre une exploitation durable des forêts.

Les principaux objectifs de cette étude sont d'identifier les problèmes en Afrique de l'ouest, qui peuvent influencer les processus de négociations APV, et en particulier les flux transfrontaliers de bois et produits transformés, les procédures de contrôle aux frontières et les systèmes de traçabilité en place dans la région. La mission d'étude couvre les pays suivants: Bénin, Côte d'Ivoire, Ghana, Guinée Conakry, Libéria, Nigéria, Sierra Leone et Togo (Cf. Annexe 1 – Termes de référence et Annexe 2 termes de référence résumé en français).

Deux consultants, Hugh Blackett et Dr. Eric Gardette ont été engagés par HTSPE Ltd. pour une période comprise du 3 mars au 15 avril pour faire cette étude. Les consultants ont passé une semaine à Bruxelles pour préparer la mission, puis cinq semaines en Afrique de l'ouest, dans les pays concernés pour rencontrer les responsables des administrations, des forêts et des douanes, ONGs, syndicats du bois et industriels du bois, entreprises de vérification, autorités portuaires et transporteurs de frêt, impliqués dans le commerce régional et international du bois (Cf. Annexe 3 – liste des personnes rencontrées), suivi par deux jours de restitution à Bruxelles devant les personnes de la Commission avant de soumettre le rapport final (Cf. Annexe 4 - Méthodologie).

2 Problèmes généraux et observations

Beaucoup de problèmes participent de la dégradation des ressources forestières et sont communs à la plupart des pays comme: la dégradation des pratiques de gestion des forêts, la prolifération des coupes forestières sauvages à la tronçonneuse et le débitage des grumes en planches, le faible respect des règlementations forestières et la corruption des personnels des entreprises forestières et des ministères, peu de contrôles efficaces, les désaccords et les conflits d'intérêts entre les différents autorités responsables de l'application des règlementations, manque des dispositifs pour identifier les sources légales et déterminer leur légalité, la sur-capacité industrielle, conflits et instabilité politique, installation de réfugiés, recrudescence des feux de forêts et extension de l' 'agriculture sur brûlis' et la production de charbon de bois.

La justification de l'utilisation de la forêt pour financer le développement économique n'a pas toujours été suivie d'effet bénéfique, et si quelques pays ont pu arriver à une croissance économique, au contraire, la pauvreté s'est accentuée dans les autres pays de la région. Le déclin de l'industrie forestière est susceptible d'accroître cette tendance s'il n'y a pas de réformes du secteur.

Une grande partie du commerce du bois est illégale et incontrôlée, beaucoup d'activités ne sont donc pas enregistrées par les brigades de contrôles ce qui, au-delà des pertes de recettes fiscales, entraîne des distorsions dans les statistiques au sein des différentes administrations et à l'intérieur d'une même administration. L'absence de chiffres exacts des capacités forestières est un handicap sérieux pou tenter de planifier la gestion des ressources restantes.

2.1 Les ressources forestières et leur gestion

Les ressources forestières dans la région sont constituées de forêts classées sous contrôle du ministère des forêts, de périmètres forestiers anciennement appelés concessions forestières. Cette dernière catégorie est maintenant sous contrôle des communautés villageoises dans le respect des règlementations en cours ou sous propriété privé pour les plantations d'hévéas. La couverture totale de la forêt dans la région est de plus de 42 millions hectares (FAO, 2006), mais au cours de la période de 1990 à 2005 une estimation moyenne donne un taux de 20,7% de déforestation. L'analyse plus spécifique montre que seule la Côte d'Ivoire a eu une légère augmentation, due probablement à l'extension de ces plantations (Cf. Tableau 1 et Figure 1). Les données du tableau 1 mentionnent des forts taux de déforestation, cependant les zones forestières sont indifférenciées et comprennent des types forestiers différents, des savanes à faible potentiel forestier et des forêts denses riches en bois. De plus, l'étendue de la dégradation des types forestiers n'est pas précisée mais est sans doute très importante dans tous les pays de la région. Bien que le Nigéria ait la plus grosse couverture forestière, c'est aussi un des plus fort taux de déforestation.

La gestion des forêts a été le plus souvent basée sur des concessions forestières données à des grandes compagnies orientées vers l'exportation des produits ligneux, encadrées par des règlementations forestières et contrôlées par le gouvernement. Le manque de personnel et d'engagement professionnel des agents de l'Etat a conduit à l'absence de contrôle efficace et d'application des réglementations. La gestion des grandes concessions forestières a été sévèrement critiquée par les organisations soucieuses du respect du droit des communautés. L'approche de la gestion des forêts prend maintenant plus en compte les choix des populations

mais beaucoup de contradictions subsistent entre la gestion passée et récente des forêts qui conduisent à l'absence de gestion concertée. L'idée largement répandue que les communautés seraient plus à même d'exploiter les ressources forestières d'une façon plus durable que les entreprises forestières reste à démontrer. Hormis des exemples locaux de gestion participative, il n'y a pas beaucoup d'exemples concrets sur la gestion responsable des forêts par les communautés hors d'un contrôle forestier et la tentation est grande d'exploiter au maximum la ressource par les villageois pour en tirer un profit maximum, voire de convertir la forêt en plantations. Dans l'état du Cross River au Nigéria, la gestion forestière par les communautés locales soutenues par le DFID, sans contrôle extérieur, a conduit à un très fort taux de déforestation.

2.2 Contrôle de l'exploitation & de la transportation des grumes

Dans la plupart des pays, le contrôle des coupes de bois est seulement partiel voire inexistant. Seul le Ghana peut se prévaloir que l'inspection des souches est encore faite par les agents forestiers, mais seulement pour les coupes forestières formelles et il a été signalé que les inspections étaient rarement réalisées et que les formulaires spécifiques pour le bois étaient normalement complétés par les concessionnaires, pour être ensuite soumis aux agents forestiers pour accord. le Libéria est en train d'introduire des contrôles (Cf. Partie 2.5).

Récemment, la faible application des réglementations a favorisé l'explosion des exploitations incontrôlées. Les groupes de coupeurs à la tronçonneuse coupent et transforment sur place les arbres en planches sciées grossières, qui sont ensuite charriées manuellement jusque vers les bords de routes pour être transportées vers les marchés; ces coupes peu économiques et incontrôlées, ont été estimées, dans certains pays pour au moins 50% de la production de grumes, avec le complément venant des opérations continues des concessions forestières. Lorsque les concessions forestières ne sont plus pratiquées, les coupes à la tronçonneuse représentent 100% de la production. Le faible prix et la qualité des bois sciés issus de ces activités satisfait la demande locale et régionale et alimente aussi les industries forestières formelles.

Bien que contraires aux réglements forestiers dans la région, les autorités forestières sont couramment à tolérer les coupes illégales par les coupeurs à la tronçonneuse, en prélevant des pots-de-vin pour obtenir des documents officiels de transport du bois, donnant ainsi à cette pratique un statut quasi-légal.

Les points de contrôle prévus pour contrôler le flux de bois sont fonctionnels dans un certain nombre de pays, mais ils ne sont pas considérés comme efficaces et sont facilement évités par le paiement de pots-de-vin. Il y a de fortes preuves anecdotiques du transport du bois illégal ou quasi-légal vers les marchés locaux, les industries d'exportations et à travers les frontières.

2.3 Le commerce de bois transfrontalier et l'exportation

Le commerce de bois transfrontalier est très répandu. Une partie de ce commerce est légal et documenté comme l'exportation terrestre de contreplaqué du Ghana vers le Nigéria, Bénin et Togo, mais la plupart du commerce est illégal et non-documenté. Le détail de ce commerce transfrontalier est donné dans la partie 3.2.

Tous les pays enregistrent des niveaux d'exportation maritime de chargement de bois containerisés. La plupart de ce commerce est légal et contrôlé, mais des cas d'exportations maritimes illégales ont été signalées. L'exportation vers l'Europe et le reste du monde est abordée dans les parties 3.3 et 3.4 et dans les rapports individuels par pays (Cf. Parties 6 à 13).

Au cours des dernières années, la forte demande en planches conjuguée avec des règlementations laxistes a permis l'exploitation incontrôlée sous la forme d'opérations de coupes à la tronçonneuse où les bois sont coupés sur place en planches brutes, manuellement charriés en bordure de route pour être ensuite chargés sur des camions vers les marchés. Ces techniques produisent énormément de pertes de bois et constituent selon les pays au moins 50% de l'exploitation forestière, le restant correspondant à la part extraite par l'industrie traditionnelle. Lorsque les concessions forestières ne sont plus exploitées cela représente 100% de production illégale. Bien que contraire aux règlementations régionales, les autorités forestières ferment les yeux sur les pratiques illicites et perçoivent les taxes pour établir des documents officiels de transports de bois. Malgré les contrôles règlementaires, il y a de multiples faits des mouvements incontrôlés de bois vers les marchés locaux, des industries d'exportation hors des frontières, dont une partie est rendue possible par la complicité des officiels gouvernementaux.

Le commerce transfrontalier est très répandu et une partie de ce commerce est légale et bien documentée, comme l'export du contreplaqué du Ghana vers le Nigéria, Bénin et Togo, mais la majorité du commerce de bois brut est illégale et non documentée. Les contrôles aux frontières sont en principe suffisants pour prévenir tout flux illégal de bois. Les procédures générales sont les permis d'exportation issus pour des chargements spécifiques et tout bois transporté hors de la frontière sera inspecté pour vérifier la conformité de la liste de spécification. Par ailleurs les bois transportés en containers ou en camions qui ont été déjà inspectés et scellés par des autorités officielles ne seront pas à nouveau contrôlés.

En pratique, beaucoup de faits rapportés sur les flux transfrontaliers de bois indiquent, qu'ils se font facilement et que les postes frontières sont très poreux. La corruption des officiels est très répandue et c'est un moyen efficace pour alimenter les flux de bois. Il y a beaucoup de zones de frontières sans gardes qui permettent le libre passage des bois en toute impunité. Les frontières délimitées par de petites rivières, comme celle entre la Côte d'Ivoire et le Libéria ou le Nigéria et le Cameroun, offrent de larges possibilités pour les flux de bois à travers la frontière sans détection.

Les conflits d'intérêts entre les administrations comme celles des douanes et des eaux et forêts sont un phénomène récurrent dans un grand nombre de pays et souvent les efforts menés par une organisation sont entravés par les pratiques de corruption d'une autre. Dans aucun des pays on note des efforts pour déterminer l'origine précise des bois et donc de leur légalité. Dans les concessions forestières, il est possible de mettre en place des systèmes de traçabilité de la souche à la grume à partir des grilles d'abattage mais pas dans le cas des coupes sauvages à la tronçonneuse où il n'y a aucun contrôle. Il ne pourra pas y avoir d'amélioration sur l'origine du bois tant que des procédures efficaces de traçabilité ne sont pas appliquées.

Fort de l'important flux de bois transfrontaliers, une démarche unitaire entre les pays pour suivre les bois à l'intérieur de la région apparaît comme essentiel, mais pas uniquement pour les opérations légales mais pour toutes exploitations forestières. Seul le Libéria, en collaboration avec SGS, est en train d'introduire des protocoles de suivi des bois mais uniquement au niveau des zones de sortie d'exports ce qui en réduit son efficacité. La Côte d'Ivoire et le Ghana vont suivre puisqu'ils sont aussi en discussion avec SGS.

L'intention de l'UE d'établir un marché commun (APE) pour la région entière envisage l'ouverture des frontières et la libre circulation des marchandises afin de favoriser le commerce, les investissements et le développement. Cela enlèverait les prérogatives des douanes de tout contrôle de mouvement de bois. En pratique cela retire un obstacle pour le commerce illégal du bois, mais il y a de nombreux exemples de l'inefficacité des douanes. L'abolition des postes frontières, suppose donc la mise en place de contrôle efficace de l'exploitation forestière et du transport des grumes par un système de traçabilité de tous les bois.

2.4 Les procédures d'exportations et douanières

Les procédures d'exportations aux frontières et aux ports sont en théorie suffisante pour empêcher les circulations illégales de bois, mais en réalité, un grand nombre de témoignages sur les flux illégaux de bois transfrontaliers semblent indiquer que les postes frontières sont aisément franchissables. Dans un certain nombre de pays on a même signalé l'exportation illégale de containers à partir des ports. La collusion des officiels est rapporté courante et c'est le moyen le plus direct pour assurer la libre circulation des bois. Autrement, il doit y avoir beaucoup de routes sans contrôles qui contournent les postes frontières officiels et permettent de faire passer en contrebande le bois en totale impunité.

Les procédures d'exportations sont relativement standards à travers la région et impliquent le délivrance d'un permis d'exportation, qui dans tous les cas implique les autorités forestières, sauf au Libéria où la responsabilité en a été confiée à SGS.

Le processus général est le suivant:

1. l'exportateur demande aux autorités forestières un permis d'exportation.
2. les autorités forestières vérifient les titres de l'entreprise de l'exportateur, les contrats et conditions financières.
3. le chargement exporté est inspecté, pour vérifier sa conformité avec les documents et les règles d'exportation. Cette inspection peut être conduite conjointement par les autorités forestières et les douanes, et des contrôles internes aux compagnies, ou par la combinaison de ces administrations et peut prendre place dans une usine ou dans les zones d'exportations.
4. Le container ou le camion est chargé et scellé par les inspecteurs, bien que parfois ceci soit réalisé par des agents des compagnies maritimes.
5. Une demande d'exportation est soumise aux autorités douanières qui vérifient que le chargement et tous les documents sont conformes. Cela peut entraîner des inspections plus poussées ou le container peut être scanné.
6. Les autorités douanières, qui ont la responsabilité ultime pour autoriser l'exportation, vont délivrer un ordre de sortie permettant au chargement d'être chargé sur un navire ou transporté à travers la frontière.

Tandis que le processus général semble être assez bien codifié, dans tous les pays au moins deux agences sont impliquées dans le processus d'exportation et il est courant que les résultats des procédures données par les différentes agences soient erronées ou contradictoires particulièrement au regard de la conduite formelle des inspections. A cause du peu de temps consacré dans chaque pays, il n'a pas été possible d'obtenir plus de précisions.

Certaines autorités n'étaient pas du tout coopératives pour fournir des informations et on a pu rapporter un manque de collaboration entre administrations, étant une raison pour expliquer la fréquence des exportations illégales. Il semble raisonnable de penser que les réticences à parler, le manque de clarté et et les accusations à l'encontre d'autres administrations puissent être liées au fait que les pratiques de fraudes sont courantes et il y a une faible volonté de transparence.

Le manque de contrôle reconnu aux postes frontières et l'incidence, élevée dans certains pays, des exportations illégales de containers, souligne clairement que les contrôles ne sont pas toujours effectifs et qu'il y a des grandes faiblesses dans leur exécution qui concernent tous les pays. Il doit être supposé que la corruption est un facteur participant majeur.

Les procédures d'exportation sont autant que possible décrites dans les rapports des pays et résumées pour chaque pays dans le tableau 9.

2.5 Le suivi du bois

Nulle part dans la région il y a des moyens effectifs pour déterminer avec précision l'origine des bois et donc sa légalité, bien que les systèmes de suivi électronique ont été introduits au Libéria et en Côte d'Ivoire où des essais sont en train d'être mis en place. L'état des systèmes de traçabilité des bois sont résumés par pays dans le tableau 2; Il y a des faiblesses universelles, qui ne peuvent être résolues que lorsque les systèmes de traçabilité seront introduits.

Tableau 2 la Traçabilité des bois

Pays	Etat du suivi des bois
Bénin	Pas de procédures efficaces mises en place.
Ghana	Système basé sur des documents papier utilisé pour suivre la production dans les concessions officielles. En théorie il y a une inspection des souches et les documents de transports sont délivrés, qui précisent l'origine de la source de la licence, mais aucun suivi des bois n'est généralisé à la majorité de la production qui reste incontrôlée.
Guinée Conakry	Pas de procédures efficaces mises en place.
Côte d'Ivoire	Des essais sont en cours d'exécution avec des systèmes de suivi des bois par SGS pour trois compagnies (Inprobois, NSA & NSBF).
Libéria	Suivi électronique des bois et traçabilité jusqu'à la souche sont maintenant mises en place par SGS dans des zones de coupes sous les contrats TSC contrat de vente de bois et FMC contrat de gestion de la forêt.
Nigéria	Pas de procédures efficaces mises en place.
Sierra Leone	Pas de procédures efficaces mises en place.
Togo	Pas de procédures efficaces mises en place.

Au Ghana, où les concessions forestières sont encore pratiquées, il est encore possible d'identifier à partir des données papiers l'origine du bois et de déterminer si la coupe est conforme aux réglementations. Cependant il n'est pas possible de suivre les grumes jusqu'à la souche. Lorsqu'il n'y a pas de contrôle, ce qui est toujours le cas avec les coupes à la tronçonneuse, l'origine du bois ne peut pas être déterminée en aucune façon. Il n'y aura pas d'améliorations tant que des mesures de traçabilité des bois ne seront pas mises en place.

A cause du commerce du bois transfrontalier et des contrôles lâches, une approche unifiée pour suivre le bois à travers la région demeure esentielle, par uniquement pour sanctionner la légalité des opérations, mais pour toutes les coupes forestières. Il n'y a qu'au Libéria que l'on observe des progrès concrets dans ce domaine.

La traçabilité des bois basée sur des collectes de données numérisées et transférées par connexion satellite est le moyen le plus sûr d'enregistrer l'origine d'une grume à sa source et de déterminer si la source est légale et les volumes coupés sont dans les limites autorisées.

Le système s'appuie sur la fixation de code-barre aux arbres avant leur coupe. Les données sont recueillies par des ordinateurs portables de poche, des lecteurs de code-barre et un GPS afin de produire rapidement des cartes de stocks pour servir de contrôle en temps réel. La gestion initiale du système de numérotation des arbres doit être faites par les autorités forestières ou au moins sous son contrôle et sa surveillance.

Autant que de vérifier l'origine du bois, le suivi des bois peut aussi permettre de contrôler les activités du personnel en charge de l'application des règlements et aider à détecter la corruption. Par exemple, si le personnel en charge de ces contrôles de flux de bois rentre des informations dans la base de données et si des divergences sont détectées, mais pas d'action enregistrée et que le camion est autorisé à circuler, alors on peut en conclure que le personnel ne fait pas correctement son travail.

L'entretien et la gestion du système peuvent être complexes et doivent être confiés à des organismes agrées spécialisées. Cette approche en sera d'autant plus efficace avec l'accès aux plus récentes technologies et nouveaux développements. De plus, la corruption étant très répandue, seul un organisme indépendant peut se prévaloir de crédibilité et de transparence. La responsabilité finale doit rester dans les mains de l'autorité forestière, avec le contractant, entreprises indépendantes fournissant des services de gestion et contrôle et signalant toutes éventuelles irrégularités à l'autorité forestière responsable.

2.6 La capacité de transformation des bois

La capacité de transformation des bois est conséquente principalement en Côte d'Ivoire, au Ghana et au Nigéria. La capacité de transformation est supérieure aux apports durables ce qui a eu pour conséquences l'accroissement de la dégradation et la destruction de la forêt. L'impact immédiat a été le déclin de l'industrie

du bois, et plus particulièrement au Nigéria. Des pénuries de bois ont entrainé une plus grande pression sur les ressources afin de satisfaire le marché local ou pour soutenir les exportations.

La demande exponentielle en bois est le principal moteur de l'exploitation illégale, et empêche ainsi toute gestion durable des forêts. Il est essentiel que l'offre en bois s'ajuste à la demande. La restructuration de l'industrie devra être un impératif des actions futures avec une prise en compte du marché local et éviter l'exclusivité des bois vers l'export pour en assurer son plein succès. Les priorités du gouvernement devront établir en premier le niveau de la demande locale et deuxièmement quel niveau de transformation à l'export est requis. L'impossibilité de satisfaire les demandes du marché local va continuer à stimuler les coupes illégales. Les industries exportatrices, avec le déclin des ressources locales, vont devoir dépendre de plus en plus des importations, mais il n'y a aucune assurance pour que cela soit possible en raison de la diminution des ressources forestières dans l'ensemble de la région.

2.7 La réglementation en vigueur

La réglementation en vigueur n'a pas été analysée en profondeur dans aucun pays, puisque l'objectif était sur les flux de bois et les procédures. Cependant les problèmes procéduraux dans tous les pays démontrent que la réglementation n'est pas effectivement exécutée à cause de la faible gouvernance dans le secteur du bois.

Puisque les dispositions prioritaires sont que les procédures soient effectivement exécutées, il y a des réglementations en vigueur qui peuvent soutenir les efforts concernant les problèmes du commerce de bois illégal et l'exploitation non-durable des ressources forestières restantes. Les problèmes remarquables sont:

1. Aucun pays ne semble manifester un intérêt au sujet de l'importation de bois illégal et cela montre que les réglementations n'abordent pas l'usage du bois illégal en provenenace des pays voisins. Des preuves flagrantes de ce fait est que la principale espèce de bois exportée au Ghana est maintenant le teck et que ce matériau brut est signalé presque entièrement de source illégale de Côte d'Ivoire. Au Nigéria, il n'y a pas de barrières pour importer du bois et les apports décrits du Cameroun entrent sans aucune difficulté bien que le Cameroun reconnaisse que beaucoup de ses coupes forestières soient légales.
2. Il semble qu'il n'y ait pas de niveau de réglementation qui reconnaisse l'importance de satisfaire les exigences du marché local. Une grande partie du bois est exporté, la plupart illégalement, malgré le fait que les sources du bois local sont de plus en plus incapables ou insuffisantes pour satisfaire le marché local et les exigences de l'industrie. Le volume total de teck exporté vers l'Inde du Bénin, Nigéria et Togo a un impact négatif sur les apports locaux et cela est en expansion et il a pu être rapporté que beaucoup de plantations sont mal gérées ou même décimées afin de satisfaire la demande extérieure plus offrante.
3. Autant que de satisfaire la demande locale, les réglementations doivent traiter les problèmes des capacités de transformation et du niveau réaliste à partir duquel les apports de matériaux bruts peuvent soutenir une industrie d'exportation durable. Le Ghana est particulièrement remarquable avec une capacité de transformation de 7.0 million de m3 d'où peut-être pas plus de 5%, selon nos estimations peut satisfaire aux exigences de sources locales gérées durablement. Nulle part dans la région il y a des ressources appropriées qui puissent permettre au Ghana d'atteindre ses objectifs fixés d'une utilisation complète de la capacité en place pour devenir une plateforme régionale de transformation.

La coopération régionale, au niveau des réglementations, renforcée par des procédures effectives, est essentielle pour stopper le flux de bois illégal. Le flux de bois vers les pays du Sahel, avec aucune resource de bois propres et le flux croissant vers le Nigéria puisque ses ressources forestières régressent, va continuer à être le moteur majeur de la destruction de la forêt s'il n'y a pas de volonté régionale pour contrôler ce commerce.

Les réglementations nationales doivent poser la question du bien-fondé des exportations croissantes vers la Chine et l'Inde au détriment de la demande locale. Une gestion appropriée des plantations existantes ou des forêts naturelles permettrait de générer des surplus de ressources en bois pour l'export, et répondre stratégiquement à la double demande marché intérieur - marché extérieur.

Aussi au niveau national, les règlementations doivent avoir une vue réaliste de ce qui peut être produit à partir des ressources disponibles et assurer que la capacité de transformation industrielle est correctement en phase avec le potentiel de production des forêts.

2.8 Les prix pratiqués

A travers la région, il y a une pauvreté importante et la demande est orientée vers des qualités médiocres et de faibles prix de bois. Les industries d'export au Ghana, payant des taxes et royalties, ont indiqué qu'il n'était pas profitable de vendre sur le marché local et de ce fait seul des apports limités sont disponibles de sources formelles. A la place la demande est satisfaite par les coupeurs à la tronçonneuse opérant illégalement avec un minimum de frais généraux, et qui vont continuer à la satisfaire à partir de récoltes incontrôlées à moins qu'il n'y aît la mise en place de restrictions effectives ou des mécanismes fiscaux qui rendent plus attractives pour les industries de transformations formelles de vendre aux marchés locaux et régionaux. Cependant, cette dernière approche n'est peut être pas réaliste dans la mesure où les forêts sont déjà considérées pour être une ressource sous-évaluée et cela pourrait entraîner une dévaluation des ressources encore plus importante.

La forte demande en bois du Nigéria, le plus grand et plus peuplé pays de la région, et le déclin dans les niveaux de la production nationale, exercent maintenant un effet sur le commerce et cette tendance va

probablement continuer. Les importations, principalement de contreplaqué du Ghana, ont augmenté de façon dramatique depuis que l'industrie de contreplaqué nigériane a cessé de fonctionner; une large proportion de l'apport en bois sciés est encore satisfaite par des ressources locales, mais une plus grande dépendance pour les ressources régionales peut être attendue dans le futur. Faire du commerce avec les entrepreneurs nigérians est intéressant. Une pratique courante dans le commerce du contreplaqué est qu'ils achètent en dehors de l'usine, organisent eux-mêmes le transport, ce qui est le plus rentable pour le fournisseur que de vendre en Europe et de s'acquitter du coût de fret. Il n'y a pas de volonté apparente au sujet de la légalité des apports et le fournisseur peut éviter le surcoût de la certification, le contrôle et le suivi. Il semble que ce commerce va prospérer et que le besoin d'une coopération régionale pour éradiquer les coupes forestières illégales va devenir de plus en plus pressant.

2.9 Les conflits

La majorité de la région a été au cœur de conflits internes et de guerres civiles. Au Libéria il y a eu deux guerres civiles, la première de 1989 à 1996 et la seconde de 1999 à 2003. Au Sierra Leone, de 1991 à 2002, il y a eu des troubles politiques répétés jusqu'à l'escalade de la guerre civile. En Côte d'Ivoire il y a eu deux coups d'Etat en 1999 et 2001 et une guerre civile, qui s'est terminée en 2002, avec un période de transition jusqu'en 2007. Le Libéria est toujours sous la tutelle de l'ONU et la Côte d'Ivoire reste également divisée en deux zones administratives.

Les conflits ont conduit à l'absence des contrôles des administrations et ont eu des conséquences graves sur les ressources forestières. Pendant la durée du conflit les forêts ont fourni un refuge pour les groupes armés et l'insécurité a détruit toute l'organisation des infrastructures. L'afflux de réfugiés du Libéria, Guinée Bissau, Sierra Leone, puis Côte d'Ivoire vers les zones frontalières de la Guinée Conakry a complètement dévasté les zones forestières (Cf. Photo 1 - La fenêtre de Guékédou).

Les coupes forestières incontrôlées et le commerce illégal des produits forestiers, faits ou avec le soutien de groupes armés ont aidé à financer les conflits. Le manque de contrôle effectif des autorités au Libéria malgré les interdictions imposées par les Nations unies d'interdiction des exportations de bois en 2003 pour 3 ans a continué. Il a été rapporté que des forces du maintien la paix d'ECOMOG d'autres nations africaines auraient été impliquées dans des coupes forestières et auraient fourni du matériel pour effectuer des coupes à la tronçonneuse.

3 Le commerce du bois

Le commerce du bois dans la région est influencé par la demande locale, régionale et internationale en particulier celle de l'Europe qui représente un marché important en valeur pour les pays exportateurs. Les principales espèces commercialisées sont décrites dans le tableau 3.

3.1 Local

Le marché local est alimenté par des bois de moindre qualité pour l'habitat et la menuiserie issus de l'exploitation illégale et incontrôlée par des coupes à la tronçonneuse qui est un facteur majeur favorisant les coupes illégales et incontrôlées. Dans les pays où les industries sont orientées vers l'exportation, des matériaux de moindre qualité peuvent être fournis pour le marché local, mais la demande est largement satisfaite par les apports de planches grossièrement sciées débitées illégalement ur place par les coupeurs à la tronçonneuse. Ces équarrits, madriers ou planches sont ensuite transportés illégalement dans les centres urbains après avoir acquitté des pots-de-vin pour l'obtention de documents de transports officiels.

3.2 Régional

En Afrique de l'ouest et au Sahel, les pays ayant des ressources forestières dégradées ou insuffisantes, sont dépendants de ceux possédant encore de grandes zones de forêts. Dans beaucoup de pays, ce commerce illégal perdure malgré les restrictions d'exportations. Les flux identifiés au niveau régional comprennent: les bois débités de Côte d'Ivoire et du Ghana vers le Sahel ; grumes et bois débités du Cameroun vers les états du nord du Nigéria, contreplaqué du Ghana vers le Bénin, Nigéria et Togo ; grumes et Bois débités de la Guinée Conakry et Libéria vers la Côte d'Ivoire ; bois débités du Sierra Leone vers la Guinée Conakry ; bois débités du Ghana et Nigéria vers le Bénin et Togo.

Les ressources limitées en statistiques et le volume important de bois basé sur des flux de bois illégaux ou non-recensés rend difficile la quantification des volumes de bois commercialisés et les véritables volumes et valeurs de bois échangés sont inconnus. Les statistiques ou les estimations, lorsqu'elles sont disponibles, sont fournies dans les rapports individuels par pays et les détails sont résumés dans le tableau 4. Les principaux flux de bois sont montrés dans la carte 1.

Les disponibilités réduites de l'information signife qu'il est impossible de tirer des conclusions fermes sur les volumes et valeurs de bois régional commercialisés, mais des observations concernant les tendances, le commerce des produits ligneux et des routes commerciales suivies peuvent être apportées comme suit:

1. Les grumes de teck récoltées dans les plantations en Côte d'Ivoire sont devenues un point important du commerce des bois transfrontaliers. La plupart de la production est apparemment transportée via le Burkina Faso jusqu'au Ghana et Togo. Elle est ensuite transformée et ré-exportée ou directement ré-exportée, principalement vers l'Inde. Le commerce est si important que le teck est maintenant devenu la principale

espèce exportée du Ghana, malgré le fait qu'il ne possède que des plantations de teck réduites. Et qu'il n'y a pas d'enregistrement officiels de ces importations de teck. Il y a aussi de vastes plantations de teck au Bénin, Togo et Nigéria. La plupart du teck du Bénin est exporté via le Togo et au Nigéria il est exporté directement.

2. Les marchés régionaux, particulièrement au Nigéria, sont d'une grande importance pour les fabricants de contreplaqués et le problème de savoir si le bois brut, entrant dans la chaîne de transformation, a été légalement coupé, est placé au second plan. Avec la dégradation continue des ressources forestières du Nigéria et de ses industries du bois, on peut s'attendre dans le futur à une augmentation croissante des flux de bois transfrontaliers pour les bois sciés et contreplaqués.
3. Possédant aucune ressource en bois, les pays du Sahel sont totalement dépendants des apports en bois venant du Ghana, Guinée Conakry, Côte d'Ivoire et Togo. Cette dépendance va s'accentuer et accroître ainsi les pressions sur les ressources forestières restantes dans la région.

3.3 Europe

Les nations de l'Union Européenne sont des acheteurs importants pour la Côte d'Ivoire et le Ghana, le premier étant le principal fournisseur de bois en termes de valeur et de volume. La tendance est à la réduction des exportations avec des valeurs en baisse de 570 € à 366 € millions de 2001 à 2007 (Cf. Figure 2), à l'exception de la Guinée Conakry qui a doublé ces valeurs d'exportations entre 2005 et 2006 (Cf. Tableau 5, Tableau 6 et Annexe 5 – Exportations vers l'UE).

Les bois débités, les moulures sont les principaux produits commercialisés, mais aussi le placage pour la Côte d'Ivoire et le Ghana. Le Nigéria, avec des ressources forestières limitées et un grand marché national, ne fournit plus de bois à l'Europe excepté pour le charbon de bois, pour lequel les exportations ont quadruplé depuis 2001. Avant l'interdiction par les Nations unies de l'exportation de grumes en juillet 2003, le Libéria était un grand exportateur de bois bruts. Malgré l'interdiction un faible volume de bois a été exporté en 2004 et bien qu'il soit admis qu'aucune exportation n'ait été faite depuis l'interdiction levée en juin 2006, les valeurs des exportations enregistrées en 2007, principalement de charbon de bois ont atteint 154 000€.

3.4 Le reste du monde

Les autres destinations des bois exportés d'Afrique de l'ouest sont les Etats-Unis, la Chine et l'Inde les deux derniers pays sont devenus des acteurs clefs de la filière. Les acheteurs indiens préfèrent les bois de teck tandis que les Chinois utilisent un plus grand choix d'espèces et en particulier le faux teck ou vene. Les principales espèces de bois commercialisées sont décrites dans le Tableau 3.

Alors que les Européens et les Américains soutiennent les tentatives pour combattre les coupes forestières illégales, les Indiens et les Chinois bénéficiaires de ce commerce illégal du bois montrent un faible intérêt pour le réguler. Il est indispensable de les inclure au processus FLEGT pour lui donner une cohérence et consolider les efforts déjà entrepris.

Pour les deux principales nations exportatrices, le Ghana et la Côte d'Ivoire, le récapitulatif des exportations officielles par valeur et région est décrit dans la figure 3 et la figure 4.

4 Les forces pour le changement

L'attention principale des autorités forestières est d'optimiser les revenus sans se soucier de la gestion durable des forêts. Malgré cela il y a une prise de conscience des problèmes. Beaucoup d'officiels gouvernementaux sont motivés pour changer de pratiques. Les ONGs bien qu'actives ne sont souvent pas informées des actions en cours. Les autorités forestières et les ONGs sont contraintes par la limitation de leurs ressources financières. Un soutien financier est nécessaire pour appuyer le changement.

4.1 Les autorités gouvernementales

Les réformes les plus urgentes à mettre en oeuvre doivent s'attacher à l'application des règlementations forestières de l'abattage, transport et exportation des bois et à améliorer les performances de l'industrie du bois. Il y a eu beaucoup d'efforts consacrés à l'élaboration de nouvelles règlementations et législations, mais les résultats escomptés dans la bonne gouvernance et le contrôle de la gestion de la forêt sont peu significatifs. Lorsque des changements ont été réalisés, ils sont souvent de nature structurelle et leur mise en application a été moins efficace que prévu à cause de la confusion et de décisions contradictoires conduisant à un manque de personnel bien formé.

Au Ghana, les appels d'offres pour les concessions forestières n'ont été que partiellement appliqués. En Côte d'Ivoire, une commission existe pour l'attribution des périmètres forestiers, mais elle n'a jamais siégé. Au Libéria toutes les coupes forestières ont été suspendues pendant la préparation de nouvelles directives, mais il semble que les autorités forestières n'aient pas assez de personnel qualifié et de moyens pour les faire appliquer.

L'initiative la plus convaincante reste le suivi des bois dans chaîne de production afin de déterminer son origine légale. La traçabilité des bois va faciliter l'identification et la poursuite des parties impliquées dans les coupes forestières illégales et doit inclure un suivi indépendant (Cf. Partie 2.5).

Les faiblesses des procédures, la corruption et collusion aux points de contrôles sont manifestes de par la multiplication des rapports de grumes illégales et bois sciés qui peuvent être facilement fournis. Des procédures bien définies, avec télé-transmission aux points de contrôles par des caméras de vidéo-surveillance, est une autre approche qui doit être considérée et peut avoir un réel effet sur les pratiques de travail fauduleuses très répandues.

L'application de terrain est en cours au Libéria, et fixera un cadre de contrôle. Le protocole est en cours de discussion au Ghana et plus récemment en Côte d'Ivoire. Le suivi des bois doit améliorer efficacement les contrôles aux postes, mais si ce système n'est pas appliqué au niveau régional il continuera d'y avoir des bois d'origine incertaine.

Comment les contrevenants sont interpellés est une autre affaire et il a été suggéré que des petits changements peuvent rapporter des résultats conséquents. Une recommandation simple faite au Nigéria était d'immobiliser les camions plutôt que leur chargement, les transporteurs ne transportant pas que du bois mais aussi bien d'autres produits. Généralement ils dépendent pour leur activité de transports d'une large gamme de marchandises et le bois pourrait devenir à terme une marchandise trop risquée à transporter.

Cette mesure existe dans la législation au Togo et au Bénin où des camions et leur chargement de bois illégal peuvent être bloqués plus d'un mois. En Guinée, ce sont les containers qui ont été saisis avant leur chargement à destination tant l'importance des chargements illégaux était évidente.

Quel que soit les méthodes de réformes employées, il est essentiel d'avoir l'appui du gouvernement et il est préférable que des discussions et négociations soient menées au plus haut niveau pour sa réalisation dans le cadre du processus de négociations des APV.

4.2 Les ONGs

L'importance croissante et la floraison des ONGs locales dans la région, particulièrement au Ghana, est un facteur d'encouragement pour conduire des réformes nécessaires. Dans toute la région, des projets foresterie et de conservation sont soutenus par des ONGs locales et des ONGs Internationales plus grandes comme le WWF (Worldwide Fund for Nature), l'IUCN, Flora et Fauna International, Birdlife et Conservation International.

Les ONGs ont chacune des approches différentes pour aborder les problèmes du domaine forestier: défense des droits des citoyens, actions de sensibilisation, conservation, soutien des communautés et amélioration de la gestion forestière. Les principales ONGs actives par pays et par type d'activités sont incluses dans le Tableau 7.

Les ONGs forment maintenant des groupes de pressions, qui façonnent l'opinion publique et influencent les pratiques gouvernementales Des projets testent de possibles réformes et établissent une base pour l'éducation à l'environnement. Le rôle des associations devient de plus en plus déterminant et participe au débat public, et des financements directs de projets peuvent constituer une des voix pour réaliser les réformes nécessaires. Au Nigéria, dans l'état de Cross River, les pressions d'ONG locales à l'encontre d'une industrie de transformation du bois, WEMPCO peu respectueuse des règles de gestion, ont pu permettre au gouvernement fédéral d'ordonner sa fermeture.

4.3 Les organisations professionnelles et industriels du bois

Les industries du bois, les forestiers à la tronçonneuse et les négociants en bois, sont dans quelques cas bien organisés en syndicats et comprennent les problèmes rencontrés par l'industrie. Il y a le sentiment dans ces organisations que les gouvernements ne fournissent pas de contrôle efficace et que de par leur représentation et leurs interventions sur tout le territoire elles peuvent suppléer le gouvernement voire le remplacer dans ces tâches de contrôle, grâce à la participation active de ces membres et empêcher des actions illicites par des opérateurs extérieurs (Cf. liste des personnes rencontrées en Annexe 3).

Au Sierra Leone un syndicat professionnel agricole et forestiers (ACOTIDA) influent et représentatif des intérêts des coupeurs à la tronçonneuse et des négociants en bois possède les statistiques les plus complètes des coupes et commerce illégal du bois et il peut influer sur ces membres pour combattre l'exploitation illégale et favoriser les réformes. Des organisations similaires existent au Ghana et en Côte d'Ivoire, respectivement le TIDD et le SPIB, et elles peuvent jouer un rôle déterminant dans l'application des directives FLEGT.

4.4 FLEGT

Les marchés de l'Union Européenne sont encore d'une grande importance pour la région et cela place l'UE, à travers le programme FLEGT, dans une position clef pour influencer des réformes avec la négociation des APV et le développement de la légalité des bois (LAS). En évitant la participation exclusive des seuls gouvernements dans les processus de négociations, la CE peut ainsi assurer un large débat avec la participation des ONGs et des professionnels du bois fort de leurs expériences et propositions. Cette participation est essentielle pour des réformes de fonds, comme la restructuration de l'industrie. La place et la force de la CE est aussi de faire en sorte que les gouvernements soient bien informés des problèmes.

Une autre importance de la CE est de faire prendre conscience et d'attirer l'attention sur la nécessité de réformer. C'est particulièrement approprié avec la Chine et l'Inde, les industriels comme les détaillants des deux nations recherchent activement des matières premières avec souvent peu d'attention aux conséquences environnementales et sans se soucier de la légalité des apports. Ces activités sont subventionnées par le gouvernement indien par des aides de 100€/m3 pour des bois bruts importés. Il est fort probable que les

mêmes avantages soient accordés aux négociants Chinois mais les primes à l'importation sont calculées en fonction du volume exporté vers la Chine et de la taille de la compagnie exportatrice. Il est difficile de dire si ces mesures d'aides à l'import sont un moteur appuyant toutes les activités illégales, néanmoins elles y contribuent et ne facilitent pas les activités légales, les opérateurs légaux ne sont souvent plus en mesure d'acheter le bois au prix courant du marché. Aussi surprenant qu'il y paraisse, cette information a été fournie par un seul entrepreneur souhaitant garder l'anonymat et n'a jamais été évoquée par aucune des administrations des pays visités bien que cette pratique soit rapportée comme uniformément répandue dans l'ensemble de l'Afrique de l'uuest.

Afin d'éviter de vains efforts à la mise en place du programme FLEGT, il est impératif que la CE utilise son statut et influence pour encourager les gouvernements chinois et indien à avoir un rôle actif dans des pratiques responsables et explorer les moyens de les appliquer à travers une plus large coopération.

Les actions devant être encouragées doivent inclure, la suppression de ces aides néfastes à l'environnement et le soutien aux industries locales par des règlementations stipulant seulement l'exportation de produits ligneux semi-transformés.

4.5 La certification

L'intérêt pour la certification de la gestion des forêts et de la chaîne de contrôle (COC) est maintenant répandu en Afrique de l'ouest. Des deux grands standards internationaux, Le Forest Stewardship Council (FSC) et le Programme for the Endorsement of Forest Certification Schemes (PEFC), seul le premier est représenté dans la région. Le bureau régional du FSC est situé au Ghana et tient de nombreux groupes de travail sur la certification au Ghana et en Côte d'Ivoire. Des initiatives nationales pour établir des standards nationaux existent dans ces deux pays.

Une autre certificat le Pan African Certification Scheme, développé par l'ATO l'Organisation Africaine du Bois, avec le soutien du CIFOR, basé sur les principes, critères et indicateurs de l'ITTO, n'a pas été adopté dans la région malgré l'adhésion de nombreux pays à cette organisation.

Le Ghana a été associé à l'établissement des systèmes de certification depuis 1966, lorsque un comité national sur la certification des forêts (NCFC) a été crée avec le soutien financier de l'UE et des Pays-Bas. Depuis 2002, il y a eu des tests de terrain sur la chaîne de contrôle et les système de traçabilité des bois et des développements de standards pour la gestion durable des forêts. Les concessions de Samartex Timber et Plywood ont été certifiées en 2003 par SGS en accord avec les standards de coupe forestière et COC au Ghana, mais pas d'autres depuis.

A ce jour, aucun autre certificat FSC n'a été attribué dans la région ni pour la gestion des forêts ni pour la chaîne de contrôle COC, bien que le WWF et son réseau Ghana Forêt et commerce (GFTN) aît maintenant cinq membres, l'adhésion engageant ses membres sur la voie de la certification (Cf. Partie 7.2). En Guinée, Foret Forte, récemment audité, remplit plus de 80% des standards FSC.

5 Résumé Observations et Conclusions

Les parties 6 à 13 comportent les rapports individuels des pays fournissant des informations connues et estimées sur le commerce du bois, les procédures de contrôle et la traçabilité; les détails sont résumés dans le tableau 8 et tableau 9.

Le problème clef est le manque général de l'application effective des réglementations sur les normes de coupes forestières, allié à la fréquence des pratiques frauduleuses ce qui permet, l'extension des activités illégales, à la fois des coupes forestières et dans le commerce national et à l'exportation. Pour surmonter ce probléme, le suivi électronique des bois est une obligation essentielle (Cf. partie 2.5). La mise en place de tels systèmes fournirait la base pour contrôler ce qui se passe en forêt et réguler le commerce du bois. De façon très importante, un système convenable peut aussi vérifier les activités du personnel de terrain et ainsi participer à l'éradication de la corruption omniprésente. Etendu au niveau national, le suivi des bois apporterait de réelles améliorations, mais des résultats complets nécessitent qu'une approche standard soit développée sur l'ensemble de la région et que toutes les nations s'engagent fermement pour prévenir toute importation de bois illégal.

Un problème profond est le manque de connaissance sur l'utilisation complète des bois dans la région et le manque général de statistiques qui sont indispensables comme base pour planifier et prendre des décisions politiques. Ceci est particulièrement vrai pour le cas des marchés locaux et les exportations terrestres qui sont moins contrôlées que les exportations maritimes. Les organisations professionnelles du bois doivent être engagées dans ce processus qui fixerait des règles et des conditions de permis pour les activités dans ce secteur, qui doivent inclure l'obligation de fournir des statistiques du commerce du bois et de coopérer à prévenir les activités illégales des membres et non-membres.

Des preuves de l'engagement du gouvernement dans la protection de l'environnement et la gestion durable des forêts semblent vides de sens au vu des maigres performances et du manque d'intérêt évident affiché par la plupart des autorités en charge de réguler le secteur forestier et le commerce d'exportation. Chaque effort entrepris doit faire pression sur les gouvernements avec des actions concrètes comme l'éradication des importations illégales, l'adoption de système de suivi de bois et des permis efficaces et la régulation complète du secteur forestier.

Au Nigéria, où la gestion de la forêt s'est presque complétement effondrée, en même temps que les grandes industries d'exportation, il y a des exemples concrets des conséquences pour les autres pays si les actions efficaces ne sont pas mises en place. Cependant, satisfaire la demande en bois du Nigéria, sera une charge croissante pour les ressources forestières restantes dans les autres pays d'Afrique de l'ouest. Des efforts doivent être faits pour changer les mauvaises pratiques de gestion, particulièrement dans les plantations, pour assurer un futur durable aux apports de bois.

Des stratégies non-réalistes incluent:

- l'hypothèse que les niveaux actuels de coupes, transformation et commerce peuvent être alimentés à partir des ressources forestières restantes
- l'approche suivie par le Nigéria, basée sur l'hypothèse sous-jacente que le bois est toujours disponible quel que soit l'origine.

Tout en étant un moyen pour assurer que seul le bois légalement produit soit importé en Europe, le processus FLEGT doit encourager une intervention sensible des problèmes rencontrés par le secteur forestier en Afrique de l'ouest.

L'analyse comparative des systèmes douaniers en Afrique de l'ouest montre une grande convergence des systèmes en place et des autorités de contrôles, Ministère des forêts, Douanes, les premiers délivrant des certificat d'origine et de conformité, des laissez-passer et des permis de coupe, les second des autorisations d'exports et des bons de chargement (Cf. Tableau 9). La taxation à l'export des produits forestiers est maximale pour les produits ligneux bruts et décroissante en fonction du degré de transformation. Dans la plupart des pays, il y a interdiction totale d'exportation de grumes ou de bois ronds indigènes. Beaucoup d'opérateurs illégaux détournent l'application des lois existantes en procèdant à de légères transformations des bois bruts extraits en les sciant en équarrits.

La tendance du marché est à une explosion de la demande locale en bois bruts et contreplaqué dans l'ensemble des pays pour couvrir les besoins croissants dans l'industrie du bâtiment ainsi qu'au niveau régional pour l'ensemble des pays frontaliers sahéliens (Sénégal, Mauritanie, Mali, Burkina Faso, Niger) qui ne disposent pas de ressources en bois suffisantes et pour ceux dont les industries de transformation sont insuffisantes ou déficientes (Nigéria, Togo, Bénin). L'Union Européenne autrefois un acteur stratégique pour les bois bruts et débités perd de son importance ainsi que le marché nord-américain au profit du marché indien initié dans la fin les années 1990 et maintenant chinois depuis le début des années 2000. La forte demande, régionale et internationale (Inde et Chine) en bois, a accéléré les prélèvements illégaux en forêts classées, forêts de conservation, forêts sacrées favorisés par une législation forestière inadaptée et des autorités de contrôles (brigades forestières, postes de douanes) insuffisamment dotées de moyens ou complètement complaisantes ou bénéficiaires de ce commerce illégal.

L'immigration de populations ouest-africaines à l'intérieur de la CEDEAO accompagnée par les immigrants libanais, indiens et chinois est un facteur favorisant la dérégulation du marché du bois, l'exemple le plus alarmant est celui de la Côte d'Ivoire ou sur les 140 opérateurs de bois officiels, la moitié ne sont pas en activité faute de matière première et on estime qu'il y a environ 70 nouveaux opérateurs illégaux, propriétaires de 'marteaux' (forêts classées), de camions de transports ou de licences d'export, souvent ne connaissant rien à l'exploitation, transformation et commerce du bois et étant seulement intéressé par des profits rapides.

Tout en étant un support pour s'assurer que seuls les produits forestiers légaux soient importés vers l'UE, le processus FLEGT doit aussi encourager une appréciation censée des problèmes rencontrés par le secteur forestier dans toute l'Afrique de l'ouest.

1. Introduction

The European Commission (EC) is currently negotiating Voluntary Partnership Agreements (VPA) with Ghana under the Forest Law Enforcement Governance and Trade (FLEGT) initiative and may shortly commence negotiations with Liberia and other exporting nations in the region. Under this initiative it is intended that Legality Assurance Schemes (LAS) will provide verification that imports of timber and timber products by European Union member nations are derived from legal forest harvesting. The eradication of trade derived from illegal and uncontrolled forest exploitation is considered to be a fundamental prerequisite to achieving sustainable forest management.

The specific objectives of this study were to identify issues in West Africa that may impact on the VPA negotiating process, and particularly cross-border flows of timber and timber products, border control procedures and timber traceability systems in place throughout the region. The study covered Benin, Ghana, Guinea Conakry, Ivory Coast, Liberia, Nigeria, Sierra Leone and Togo (see Annex 1 - Terms of Reference & Annex 2 – TdR résumé en français).

Two consultants, Hugh Blackett and Dr. Eric Gardette were engaged by HTSPE from 3 March to 15 April to undertake this study. One week was spent in Brussels for preliminary briefing and country visit preparation, five weeks in West Africa visiting target countries and meeting representatives of the forest authorities, customs, Non-governmental Organizations (NGOs), timber trade organizations, private companies, independent auditors, port authorities and freight handling companies involved with regional and international timber trade (see Annex 3 - List of People Met). A further two days were spent in Brussels to debrief relevant EC officials in advance of report submission (see Annex 4 - Methodology).

2. General Issues & Observations

There are many issues that are contributing to forest degradation and destruction in the region. Most are common to all countries and even where some forest survives, poor practices persist despite the obvious negative impacts that they have had on other countries, which no longer have the forest resources to supply market requirements, and with timber industries in decline. Issues of concern include:

- Deterioration of forest management practices
- Proliferation of chainsaw logging and wasteful in-situ processing of logs into planks
- Weak enforcement and collusion of officials with illegal loggers and timber traders
- Ineffective results achieved through alternative approaches to forest management
- Ineffective border controls and border porosity allowing uncontrolled movement of timber
- Disagreement and poor collaboration between different authorities responsible for enforcement
- Lack of effective means to identify raw material sources and determine legality
- Excess industrial timber processing capacity
- Past conflict and political instability
- Uncontrolled slash-and-burn agriculture and high incidence of forest fires
- Excessive and uncontrolled harvesting for charcoal manufacture.

The concept that forest utilization is justified to fund development does not appear to have been widely successful and, while some countries have managed to achieve economic growth, there is obvious poverty throughout the region. Without reform, the noticeable decline throughout the forest sector is only going to exacerbate the situation.

With much of the trade being illegal and unregulated a great deal of activity is unrecorded and reliable figures are completely lacking. For official trade, records are unavailable, inaccessible or there may be inconsistencies between statistics produced by different organizations or even by different departments within the same organization. The lack of good quality statistics, or complete absence of statistics, means that a definitive analysis of the situation and trends is challenging and has to rely heavily on the opinions and estimates of unconfirmed accuracy given by local experts.

2.1 Forest Resources & Management

Forest resources in the region consist of protected areas, forest reserves under direct government control and off-reserve forest areas. The last category are often on community lands, where community access and utilization may be permitted subject to government requirements being observed, or under private ownership, which is largely the case for rubber plantations.

The estimated extent of forest area in the region is over 42 million hectares (FAO, 2006), but in the period from 1990 to 2005 it is estimated that an average of almost 21% of forest was lost. Only in Ivory Coast has there been any area increase, presumably as a result plantation development. Area figures for 2005 and for loss from 1990 to 2005 are shown in Table 1 & Figure 1.

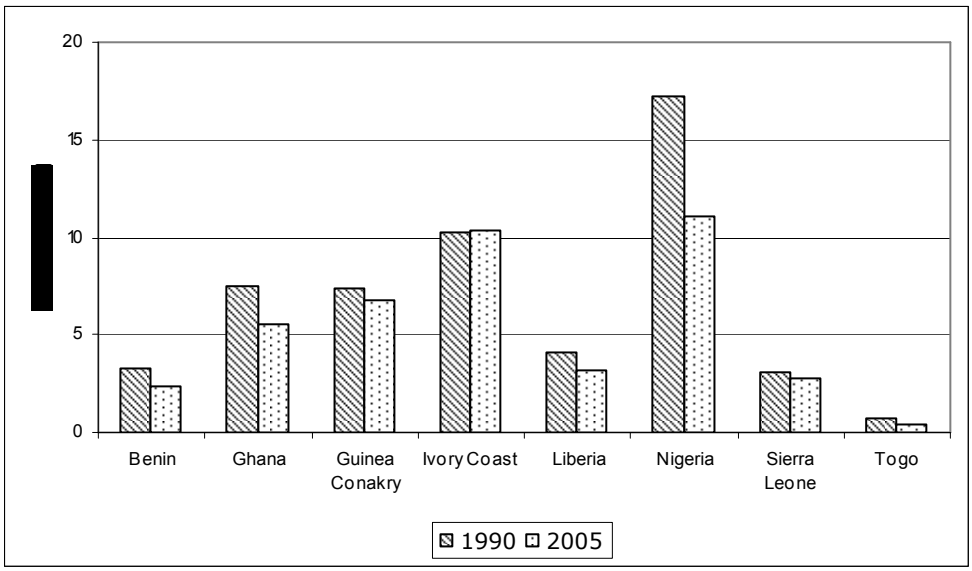
Table 1 West Africa - Forest Areas (1990 & 2005)

Country	Forest Area (2005)		Forest Area (1990)	
	Area (ha x 1,000)	% of Total Area	Area (ha x 1,000)	% Forest Loss
Nigeria	11,089	12.2	17,234	(35.7)
Ivory Coast	10,405	32.7	10,222	1.8
Guinea Conakry	6,724	27.4	7,408	(9.2)
Ghana	5,517	24.2	7,448	(25.9)
Liberia	3,154	32.7	4,058	(22.3)
Sierra Leone	2,754	38.5	3,044	(9.5)
Benin	2,351	21.3	3,322	(29.2)
Togo	386	7.1	685	(43.6)
Total	42,380		53,421	(20.7)

Adapted from FAO Forest Resource Assessment, 2006

The above figures serve best to indicate the high rate of forest loss, but the areas of forest are undifferentiated and include a variety of forest types such as savannah woodlands that have limited potential to supply wood processing industries. Further, the extent of forest degradation is unknown, but thought to be widespread particularly in off-reserve areas. Although Nigeria has the greatest area of forest it also shows the second highest rate of loss and it was reported locally that the rate of degradation and loss is accelerating. This is apparently in common with all other nations in the region.

Figure 1 West Africa - Forest Areas (1990 & 2005)



Adapted from FAO Forest Resource Assessment, 2006

Forest management has been based generally on the allocation of concessions to large export oriented companies expected to operate within government regulations and to be monitored by government. Lack of manpower or commitment has resulted in ineffectual monitoring and limited adherence to regulations. Concession based management has had much criticism, in particular from organizations concerned that the rights of local communities were being ignored. Now the approach to management by concession allocation has either been abolished or is being greatly modified, but the process of modification has not yet been smoothly accomplished. There are many contradictions and there is a great deal of confusion. Currently, forest management appears nowhere to be adequate and elsewhere is non-existent.

There is widespread acceptance that communities might play a wider role in management of forests designated as permanent production areas, and a belief that this approach will be more likely to achieve legal and sustainable management. However, evidence that communities will manage forests responsibly is not strong. Within a weak regulatory environment, communities are reported to have taken full advantage, where possible, to maximize revenue from harvesting, both in permanent forest areas and in off-reserve areas where the accepted objective may be eventually to convert forest to agricultural land.

2.2 Control of Harvesting & Timber Movement

In all countries control of harvesting is only partial or even non-existent. Ghana alone claims that stump inspection is still conducted by forestry officials, but only in formal logging operations where it is reported that the inspections are rarely conducted and that Timber Information Forms are normally completed by concessionaires then submitted to forestry officials for approval. Liberia is in the process of introducing controls (see Section 2.5).

In recent years, weak enforcement of regulations has allowed uncontrolled exploitation to flourish. Chainsaw logging gangs fell and convert trees in-situ to rough-sawn planks with the planks then being manually extracted to roadside for onward transportation to markets. This very wasteful and unregulated logging is estimated to account, in some countries, for at least 50% of log production with the balance coming from continued operation of concession based management. Where concession management is no longer practised chainsaw logging accounts for 100% of production. The low-cost, low-grade sawn-timber derived from these operations meets local and regional demand, and also supplies formal industries.

Although contrary to forest regulations throughout the region, forest authorities are routinely condoning illegal logging by chainsaw loggers through collection of fees for issue of official timber transportation documents, thus giving the practice quasi-legal status.

Checkpoints intended to control timber movement are operated in a number of countries, but are consistently reported to be ineffective and easily circumvented by payment of bribes. There is strong anecdotal evidence of illegal or quasi-legal timber being transported to local markets, export industries and across borders.

2.3 Cross Border Trade & Exports

Cross border trade is allegedly widespread. Some of this trade is legal and documented, such as export of plywood overland from Ghana to Nigeria, Benin and Togo, but much of the trade is illegal and undocumented. Details of cross-border trade are given in Section 3.2.

All countries record some level of maritime exports of containerized cargoes of timber. Much of this trade is legal and controlled, but instances of illegal maritime exports were also cited. Export trade with Europe and the rest of the world is discussed in Sections 3.3 & 3.4 and in individual country reports (Sections 6 to 13).

2.4 Export Procedures

Export procedures at land borders and ports are theoretically adequate to prevent illegal movement of timber, but in reality, widely cited incidences of illegal cross-border timber movement indicate that border controls are easily circumvented. In a number of countries there were also reports of illegal exports of containers through ports. Official collusion is understood to be common and is the most straightforward means of ensuring unimpeded movement. Alternatively, there may be many unguarded routes that by-pass official frontier posts and allow timber to be smuggled with impunity. Boundaries following sizeable rivers, such as between Ivory Coast and Liberia or Nigeria and Cameroon, provide ample opportunities for movement of timber across borders without detection.

Export procedures are fairly standard throughout the region and typically involve the issue of an export licence, which in all countries involves the forest authorities, except in Liberia where responsibility has been delegated to SGS. The generic process is:

1. Exporter applies to the forest authority for an export permit.
2. The forest authority checks the exporter's business credentials, contracts and financial arrangements.
3. The export consignment is inspected to verify conformity with documents and export regulations. This inspection may be undertaken jointly by forest authorities, customs officials and private inspection companies, or by any combination of these agencies, and may take place at a mill or at point of export.

4. The container or lorry is loaded and sealed by the inspectors, although sometimes this is done by shipping agents.
5. An export application is submitted to the customs authority, which verifies that the consignment and all documentation are in order. This may involve further physical inspection or container scanning.
6. The customs authority, which has ultimate responsibility for approving export, will issue a release order permitting the consignment to be loaded on a vessel or transported across the border.

While the generic process would seem to be straightforward, in all countries at least two agencies are involved in the export process and it was common that accounts of procedures given by different agencies were inconsistent or contradictory, particularly with respect to the formal conduct of inspections. Because of the short time available in each country it was not often possible to obtain further clarification.

Some authorities were uncooperative in providing information and there were also a number of reports of lack of intra-agency cooperation being the reason for the incidence of illegal exports. It seems possible that the reticence to talk, the lack of clarity and the accusations against other organizations might have been connected to the fact that corrupt practices are common and there is a limited desire for transparency.

The acknowledged lack of control at overland borders and the incidence, high in some countries, of illegal container exports demonstrate clearly that controls are not always effective, and that there are major weaknesses in implementation that affect all countries. It has to be assumed that corruption is a major contributing factor.

Export procedures are described as far as possible in the country reports and are summarized for each country in Table 8 in English and Table 9 in French.

2.5 Timber Tracking

Nowhere in the region are there effective means of determining accurately the origin of timber and therefore its legality, although electronic tracking systems are now being introduced in Liberia and in Ivory Coast some trials are being conducted. The status of timber traceability systems is summarized by country in Table 2. There is a universal weakness, which will only change when timber tracking systems are introduced.

Table 2 West Africa - Timber Traceability

Country	Status of Timber Tracking
Benin	No effective procedures in operation.
Ghana	Paper based system in operation to track production from official concessions. In theory there is stump inspection & then transport documents are issued, which identify source licence area, but no tracking is applicable to the majority of production, which is uncontrolled.
Guinea Conakry	No effective procedures in operation.
Ivory Coast	Tests being implemented of timber tracking system by SGS with three companies (Inprobois, NSA & NSBF).
Liberia	Electronic timber tracking providing back-to-stump traceability is now being implemented by SGS in areas harvested under Timber Sales Contracts & Forest Management Contracts.
Nigeria	No effective procedures in operation.
Sierra Leone	No effective procedures in operation.
Togo	No effective procedures in operation.

In Ghana, where concession based management is still practised it may be possible to identify from paper-based records the forest of origin and to determine that harvesting is in accordance with regulations. It is not however possible to trace logs back to stump. Where there is no control, which is universally the case with chainsaw logging, origin cannot be determined in any way. There will be no improvement until effective timber tracking procedures are implemented.

Because of the cross-border timber trade and weak controls, a unified approach to timber tracking throughout the region would appear to be essential, not just for legally sanctioned operations, but for all forest harvesting. Only in Liberia is there any concrete progress in this respect.

The EC intention of establishing an Economic Partnership Agreement (EPA) for the entire region envisages open borders and free movement of goods in order to encourage trade, investment and

development. This would remove any control of timber movement currently imposed by customs authorities. In theory this means one less barrier to trade in illegal timber, but widespread opinion is that the role played by customs authorities is anyway ineffective. The abolition of border controls, along with the need to ensure appropriate monitoring of timber harvesting and movement, make the need for an effective system to trace the source of all timber an absolute imperative.

Timber tracking based on computerized data collection and satellite data transfer to a central database is the most reliable way that a record of log origin can be maintained, thus enabling identification of source and the possibility of determining whether the source is legal, and if volumes harvested are within permitted limits.

Suitable systems commence with the attachment of barcodes to trees in advance of harvesting. Data collection by hand-held computer, barcode reader and a global positioning system would allow rapid production of stock maps to be used as the basis for monitoring. Initial management of the system at the stage of tree tagging should be by the forest authority, or at least under its control and checkable.

As well as providing the means to verify log origin, timber tracking can also provide the basis for monitoring the activities of staff working on enforcement issues and help to detect corruption. For example, if staff deployed in checking timber movement feed information into the database and discrepancies are detected, but no action is recorded and the lorry is allowed to move, then it can be concluded that staff are not properly performing their duties.

Maintenance and management of systems can be complex, and the use of specialized service providers should be considered. This approach would provide efficient, ongoing access to the latest technology and future developments. Furthermore, with widely acknowledged corruption being common, an independent service provider may enhance the overall credibility and transparency of the process. Ultimate responsibility should remain with the forest authority, with the contracted, independent company providing management and monitoring services and feeding back information on detected irregularities to the forest authority for its action.

2.6 Timber Processing Capacity

Substantial timber processing capacity has been developed, principally in Ivory Coast, Ghana and Nigeria. The capacity has outstripped the sustainable supply and has resulted in forest loss and degradation. The further impact has been a decline in the timber industry, most notably in Nigeria. Shortages of timber have resulted in increased competition for resources, to satisfy local market demand or to sustain export trade.

Excessive timber demand is a major stimulus for illegal harvesting, and obviates the possibility of sustainable management. It is essential that attempts are made to balance timber supply and demand. Downsizing industry should be an imperative course of action, but will fail if industrial focus remains export oriented and does not address local market requirements. Government priorities should establish firstly how local supply will be achieved and secondly what level of export processing is permissible. Failure to meet local market requirements will maintain the stimulus for illegal logging. Exporting industries, with declining local resources, may have to depend increasingly on imports, but there is no certainty that this will be possible due to diminishing resources throughout the region.

2.7 Policy Issues

Policy issues were not looked at in depth in any country, as the focus was on trade flows and procedures. However, procedural problems in all countries indicate that policy is not being effectively implemented because the quality of governance in the timber sector is poor.

While the overriding requirement is that procedures are effectively implemented, there are policy issues that could support efforts to address the problems of illegal timber trade and unsustainable exploitation of remaining forest resources. Notable issues are:

1. No country demonstrates any concern about import of illegal timber and it would appear that policies do not address use of illegal timber sourced from neighbouring countries. Clear evidence of this is the fact that Ghana's main export species is now teak and the raw material is reported to be almost entirely illegally sourced from Ivory Coast. In Nigeria there are no barriers to importation of timber and reported supplies from Cameroon enter without restriction despite the fact that Cameroon acknowledges that much of its logging is illegal.
2. There seem to be no policy level considerations that recognize the importance of being able to meet local market requirements. A great deal of timber is being exported, much of it illegally, despite the fact that local timber sources are increasingly unable or are inadequate to meet local market and industry requirements. The volume of teak being exported to India from Benin, Nigeria and Togo is having a negative impact on local supply and this is going to be compounded as it is reported that

many of the plantations are being poorly managed or even decimated to meet profitable demand from overseas.

3. As well as meeting local demand policies have to address issues of processing capacity and the realistic level to which raw material supply can support a sustainable export industry. Ghana is particularly notable with a processing capacity of 7.0 million m^3 of which perhaps as little as 5% according to some estimates can be met from sustainably managed local sources. Nowhere in the region are there adequate resources that will allow Ghana to achieve its stated objective of fully utilizing the installed capacity by becoming a regional processing hub.

Regional cooperation at a policy level, backed by effective procedures, is essential to curb the movement of illegal timber. Flows of timber to the Sahel countries, with no timber resources of their own, and increasing flows to Nigeria as its forest resources decline, will continue to be major drivers of forest destruction if there is no regional action to control the trade.

National policy should question the wisdom of increasing exports to China and India to the detriment of local supply. Only with a concerted effort to ensure proper management of existing plantations, or natural forests, which might generate surplus timber for export, can this be conceived as sensible policy.

Also at a national level, policy has to take a realistic view on what can be produced from available resources and ensure that industrial processing capacity is properly licensed and aligned with the forests' production potential.

2.8 Pricing Issues

Throughout most of the region there is considerable poverty and demand is focused on low-grade, low priced timber. Export industries in Ghana, paying royalties and taxes, reported that it was unprofitable to sell on the local market and so only limited supply is made available from these formal sources. Instead the demand is met from chainsaw loggers operating illegally with minimal overheads, and will continue to be met from this uncontrolled harvesting unless there is implementation of effective restrictions, or fiscal mechanisms make it more attractive for formal processing industries to sell to local and regional markets. However, the latter approach may not be realistic as forests are already considered to be an undervalued resource and this could result in further devaluation.

The huge demand for timber from Nigeria, the largest and most populated country in the region, and the decline in national production levels is now having an impact on the trade and this trend is likely to continue. Imports, principally of plywood from Ghana, have increased dramatically since Nigeria's own plywood industry ceased to function. A large proportion of sawn-timber supply is still met from local resources, but greater dependence on regional resources can be expected in future. Dealing with Nigerian businessmen is attractive. The current practice in the plywood trade is that they buy ex-factory and make their own transport arrangements, which is more profitable for the supplier than selling to Europe and having to bear freight costs. There is no apparent concern about legality of supply and so the supplier can avoid additional costs of certification, verification and monitoring. It seems likely that this trade will increase and that the need for regional cooperation to eradicate illegal logging will become even more pressing.

2.9 Conflict

Much of the region has been affected by internal conflict and civil war. In Liberia there were two civil wars, the first from 1989 to 1996 and the second from 1999 to 2003. In Sierra Leone, between 1991 and 2002, there was repeated political turmoil frequently escalating into civil war. In Ivory Coast there were coups in 1999 and 2001 and a civil war, which broke out in 2002, was only ended formally in 2007.

Conflicts have resulted in a breakdown of government controls, and have had an unknown, but potentially serious impact on forest resources. Forests provided a secluded refuge for armed groups and in this unsafe environment management infrastructure collapsed. Refugees from Liberia, Guinea Bissau, Sierra Leone and Ivory Coast flowed into border areas in Guinea Conakry and devastated the forest resources in the Guékédou Window (see Photo 1).

Uncontrolled logging, carried out either by, or with the support of armed groups, has helped to fund conflict, or there has been indiscriminate profiteering. Personnel from ECOMOG, the West African peacekeeping force, allegedly engaged in logging in Liberia and were instrumental in providing the resources to support chainsaw logging, which is now prevalent throughout the region. It was also reported that troops deployed in Operation Licorne, the French military support to the United Nations (UN) operation in Ivory Coast, were involved in logging and, with rebels, in armed bank robbery.

Photo 1 - The Guékédou Window, Guinea Conakry

In Liberia the forest is still dense (dark green). In Guinea Conakry, where refugee settlements were located, the forest has been completely degraded (light green with white dots indicating settlements)

3. The Timber Trade

Timber trade in the region is influenced by local, regional and overseas demand, with Europe being an important market for the major producing nations. The main species traded are shown in Table 3.

3.1 Local

Local market demand is largely for cheap, low-grade timber used in construction and joinery. It is a major stimulus for illegal and uncontrolled logging. In countries with export oriented industries some low-grade material may be available to the local market, but the demand is largely met by supply of rough-sawn planks produced illegally in-situ by chainsaw logging gangs. Planks may then be transported illegally to major urban centres, or with quasi-legal status because of fees sometimes being paid for official transport documents.

3.2 Regional

Within West Africa and the Sahel, countries with either depleted forest resources, or lacking forest resources, are dependent for supply on those with forest remaining. In many countries export restrictions render this trade illegal, but it continues regardless. As with local markets, much of the demand is for cheap rough-sawn timber and regional markets are a further stimulus for illegal chainsaw logging. Reported or identified flows include:

- Sawn-timber from Ivory Coast & Ghana to the Sahel

- Logs and sawn-timber from Cameroon to northern Nigerian states
- Plywood from Ghana to Benin, Nigeria & Togo
- Sawn-timber from Guinea Conakry & Liberia to Ivory Coast
- Sawn-timber from Sierra Leone to Guinea Conakry
- Sawn-timber from Ghana & Nigeria to Benin & Togo.

Limited availability of statistics and the high volume of trade based on unrecorded or illegal timber movement means that the true volume and value of the trade is unknown. Statistics or estimates, where available, are provided in country reports and details are summarized in Table 4. Major timber flows are shown in Map 1.

Table 3 West Africa - Main Timber Species Harvested

French name	English name	Scientific name
Acajou	African mahogany	Khaya ivorensis
Ako	Antiaris	Antiaris Africana
Azobe	Ekki	Lophira alata
Badi	Opepe	Nauclea diderrichii
Frake	Black afara, idigbo, emeri	Terminalia ivorensis
Framire	Afara	Terminalia superba
Fromager	Ceiba	Ceiba pentandra
Iroko	Iroko	Melicia excelsa
Lingue	Afzelia	Afzelia Africana
Niangon	Niangon	Heritiera utilis
Samba	Wawa	Triplochiton scleroxylon
Sapele	Sapele, utile	Entandrophragma spp
Teak	Teak	Tectona grandis
Vene	False-teak, African rosewood	Pterocarpus erinaceus

The limited availability of information means that it is not possible to draw concrete conclusions about the volume or value of regional timber trade, but some observations regarding trends and important trade products and trade routes can be made as follows:

1. Teak logs harvested from plantations in Ivory Coast have become an important component of the cross-border timber trade. Much of the production is apparently transported via Burkina Faso to Ghana and Togo. It is then processed and re-exported or re-exported directly, mainly to India. The trade is of such importance that teak is now Ghana's main export species, despite the fact that Ghana has limited teak plantations and there were no official records of any teak imports. There are also considerable areas of teak plantations in Benin, Togo and Nigeria. Teak from Benin is exported illegally either directly or via Togo, and from Nigeria it is exported directly.
2. Regional markets, particularly Nigeria, are of major importance for Ghana's plywood manufacturers and the issue of whether the raw material used in manufacture has been legally sourced is of limited or no concern. With the continuing depletion of Nigeria's forest resource and timber industries it can be expected in future that there will be growing cross-border trade in sawn-timber as well as plywood.
3. Having no timber resources, the Sahel region is totally dependent on supply of timber coming from Ghana, Guinea Conakry, Ivory Coast and Togo. This dependence will continue and adds to the pressure on remaining forest resources in the region.

Table 4 West Africa - Regional Timber Flows (2007)

From	To	Product	Volume	Status
Benin	Togo	Squared logs	100,000m^3	Illegal
Ghana	Benin	Plywood	2,500m^3	Legal
	Benin	Lumber	Unknown	Illegal
	Benin (in transit to Sahel)	Teak sawn-timber	Unknown	Illegal
	Ivory Coast	Lumber	Unknown	Illegal
	Nigeria	Plywood	74,500m^3	Legal
	Nigeria	Lumber	Unknown	Illegal
	Sahel region	Lumber	39,000m^3	Legal
	Sahel region	Lumber	260,000m^3	Illegal
	Togo	Plywood	6,700m^3	Legal
	Togo	Lumber	Unknown	Illegal
Guinea Conakry	Ivory Coast	Logs & sawn-timber	Unknown	Illegal
	Sahel region	Lumber, plywood & furniture	Unknown	Legal & illegal
Ivory Coast	Ghana	Manufactured products	290,000m^3	Legal
	Ghana	Teak logs & sawn-timber	250,000m^3	Illegal
	Sahel region	Logs & sawn-timber	Unknown	Legal & Illegal
	Togo	Teak logs & sawn-timber	Unknown	Illegal
Liberia	Guinea Conakry	Logs & sawn-timber	Unknown	Illegal
	Ivory Coast	Lumber	Unknown	Illegal
Nigeria	Benin (in transit to Sahel)	Lumber	Unknown	Illegal
	Sahel region	Poles	Unknown	Legal
	Togo	Lumber	Unknown	Illegal
Sierra Leone	Guinea Conakry	Logs & sawn-timber	Unknown	Illegal
	Liberia	Lumber	Unknown	Illegal
Togo	Sahel region	Lumber & veneer	Unknown	Illegal

3.3 Europe

European markets are important to Ivory Coast and Ghana with the former being the main supplier in terms of both value and volume. In general the trend has been for a decline with trade value falling from €570 to €366 million from 2001 to 2007 (see Figure 2). Guinea Conakry was an exception, approximately doubling the value of exports in 2005 and 2006 (for details of exports see Table 5, Table 6, and Annex 5 to Annex 12.

Figure 2 Ivory Coast & Ghana - Timber Exports to Europe (2001 to 2007)

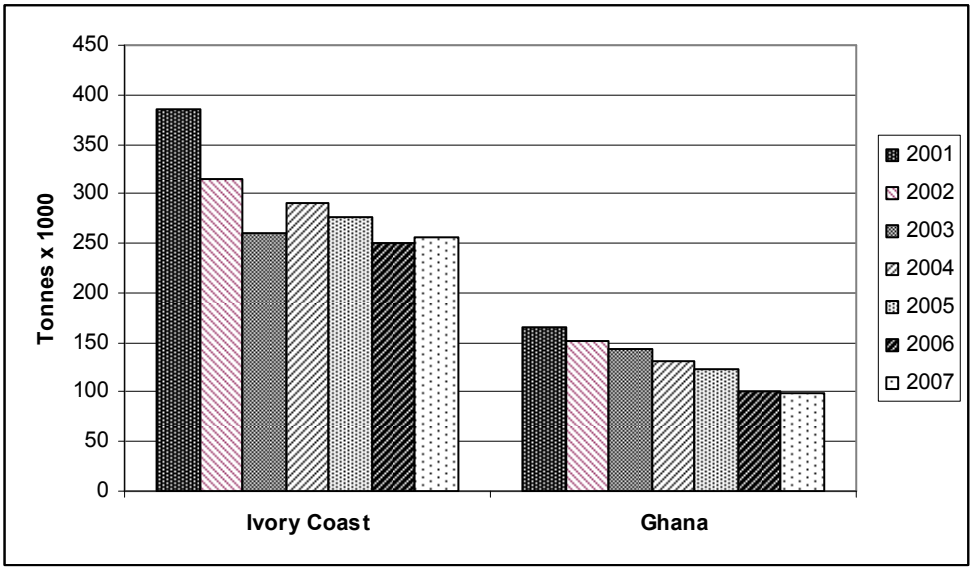


Table 5 West Africa - Timber Exports to Europe in € x 1000 (2001 to 2007)

Country	2001	2002	2003	2004	2005	2006	2007	Average
Ivory Coast	297,634	248,303	214,091	241,330	243,958	216,015	226,897	241,230
Ghana	150,290	135,669	124,838	119,426	120,944	101,968	100,788	122,103
Nigeria	36,528	24,194	25,318	26,751	29,686	29,347	29,183	47,644
Liberia	74,935	71,284	42,309	36	0	0	154	28,863
Guinea Conakry	4,625	2,253	1,678	3,326	5,903	7,258	4,349	4,321
Benin	4,045	2,639	2,899	2,656	3,354	3,036	2,396	3,052
Togo	2,002	2,024	3,052	2,675	2,080	1,498	1,857	2,227
Sierra Leone	408	590	202	137	82	209	835	526
Total	570,467	486,955	414,387	396,338	406,007	359,331	366,460	449,966

Source: Eurostats

Table 6 West Africa - Timber Exports to Europe in Tonnes (2001 to 2007)

Country	2001	2002	2003	2004	2005	2006	2007	Average
Ivory Coast	385,770	314,389	260,240	291,182	277,196	250,662	255,558	290,821
Liberia	245,813	234,595	153,540	67	0	0	35	159,208
Ghana	166,031	150,928	142,778	130,880	124,103	101,453	99,278	130,933
Nigeria	58,246	37,723	47,613	61,699	71,717	78,619	96,841	64,908
Guinea Conakry	9,810	4,231	2,743	7,565	9,813	11,486	8,740	7,980
Benin	3,480	2,740	2,561	2,729	3,920	3,147	2,022	3,040
Togo	2,342	1,340	2,333	1,832	1,172	775	985	1,665
Sierra Leone	275	722	227	395	272	400	1,158	786
Total	871,766	746,668	612,034	496,348	488,192	446,542	464,615	659,340

Source: Eurostats

Trade is mainly in sawn-timber and moulded products, but veneer is also an important trade component for Ivory Coast and Ghana. Nigeria, with limited forest remaining and a large internal market, no longer supplies substantial volumes of timber products except for charcoal, of which exports have almost quadrupled since 2001. Prior to a UN ban on exports in July 2003, Liberia was a major supplier of logs. Despite the ban, a small volume of timber was exported in 2004 and although it is believed that there have been no exports since the ban was lifted in June 2006, exports worth €154,000, mainly of charcoal, were recorded in 2007.

3.4 Rest of the World

Other important destinations for timber exports from West Africa are USA, China and India with buyers from the latter two nations becoming increasingly active in the region. Indian buyers are particularly focused on teak sawn-timber and poles while Chinese interest is in logs and sawn-timber of a wide variety of species including camwood and false-teak or vene.

While the European and USA are supporting initiatives to eradicate illegal logging, limited concern is being shown by either Indian or Chinese buyers who are allegedly complicit in some of the illegal trade. Failure to curtail such activity will undermine efforts being made under the FLEGT initiative.

For the two principal exporting nations, Ghana and Ivory Coast, the breakdown of official exports by value and region is shown in Figure 3 and Figure 4.

Figure 3 Ghana - Official Timber Exports by Region & Value (2006)

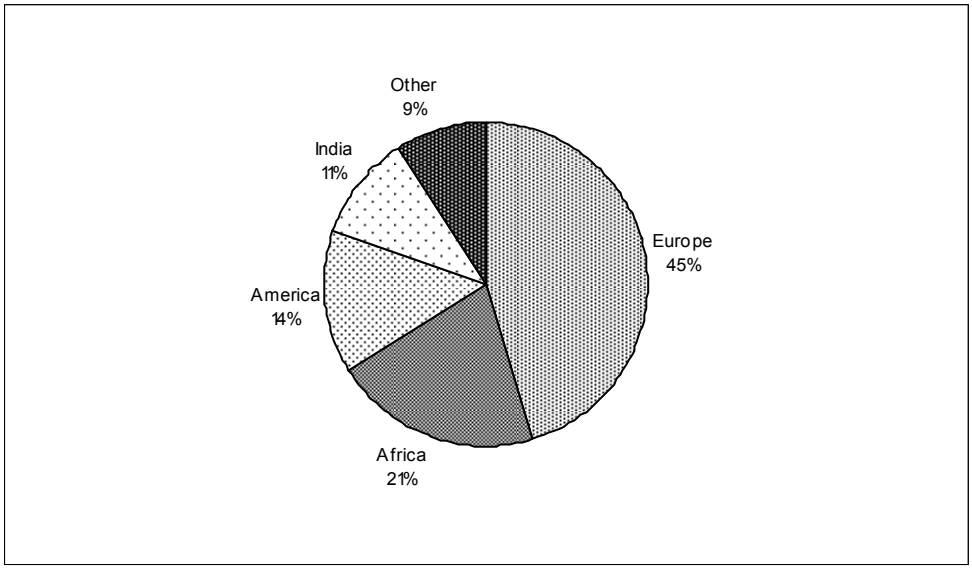
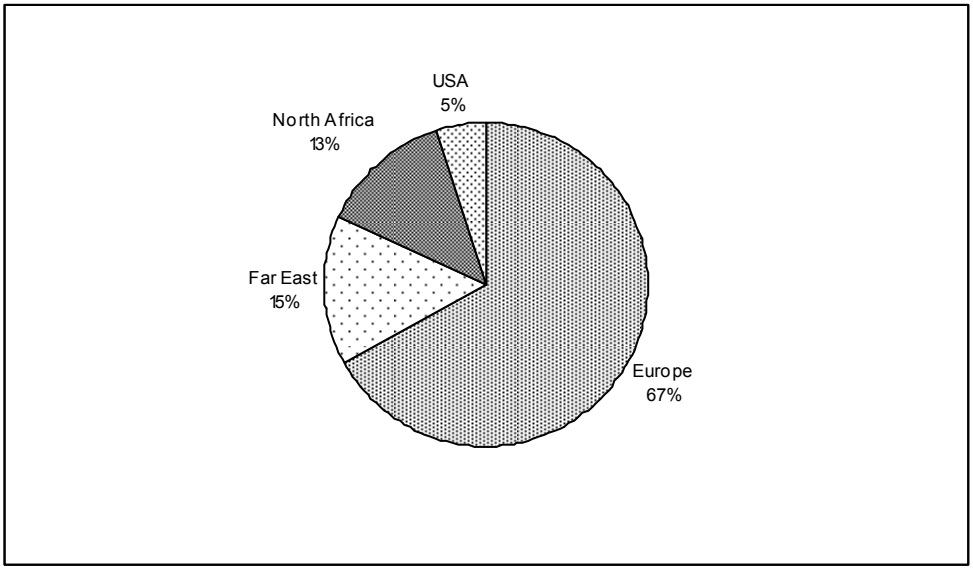
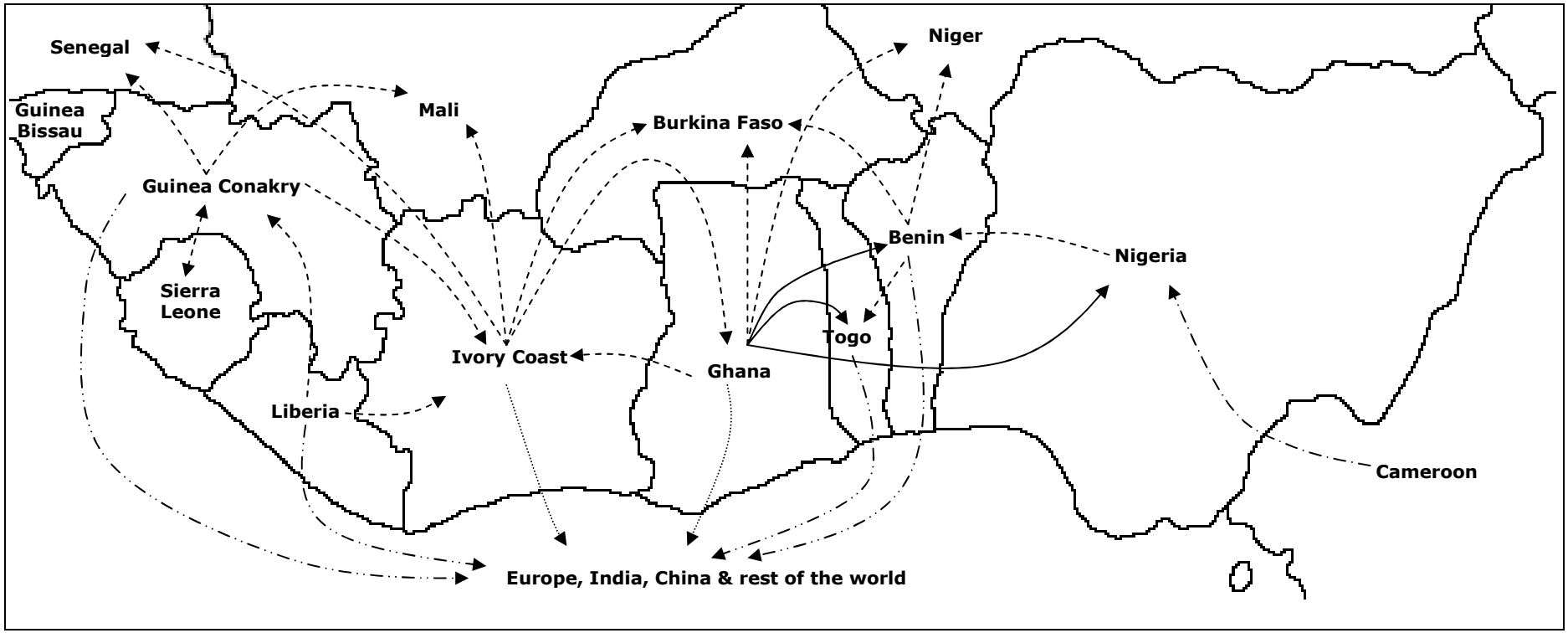


Figure 4 Ivory Coast - Official Timber Exports by Region & Value (2006)



Map 1 West Africa - Main Timber Flows



Key

Documented legal trade (mainly plywood)

Acknowledged illegal/uncontrolled trade (mainly sawn-timber)

Rumoured illegal/uncontrolled trade (possibly logs & sawn-timber)

Legal exports to other regions

Illegal exports to other regions

4. Forces for Change

The focus of the forest authorities is largely on maximizing revenue with limited attention to professional forest management. Despite this, there is ample awareness of the problems. Many government officials expressed a commitment to change, and, though often excluded from any meaningful involvement, there is universal support from NGOs. Both forest authorities and NGOs are severely constrained by the limitation or lack of resources. Support is required if change is to be achieved.

4.1 Government Authorities

Meaningful and urgent reform is essential, and the real requirement is to address the lack of effective enforcement and industrial over-capacity. Much attention has been given to policy and legislation, but changes have taken time and, without effective procedures to ensure policy implementation and compliance with legislation, the results have not yet had any widespread impact resulting in improved enforcement, better control of forest management or industry downsizing. Where changes have been made they are often structural in nature and implementation has been less effective than expected because of confusion, contradictory decision making or a shortage of trained staff.

The most promising initiative would be the uptake of timber tracking allowing determination of source and the means to verify legality. Timber tracking would facilitate identification and prosecution of parties involved in illegal activities, and would ideally incorporate independent monitoring (see Section 2.5).

Procedural weaknesses, corruption and collusion at checkpoints are evident because of the high incidence of reports that illegal logs and sawn-timber can be readily obtained. Well defined procedures, with remote monitoring of checkpoint activity by close circuit television cameras, is another approach that could be considered and may have an impact on widespread negative working practices.

How detected offenders are dealt with is another area where it has been suggested that simple changes could yield rapid results. A specific recommendation made in Nigeria was that confiscation of lorries, as well as timber, would have a major impact by providing a very real deterrent to lorry operators carrying timber. Generally they rely for their livelihood on transport of a range of goods and carrying timber would soon be seen as an unwarranted risk.

Whatever methods of reform are identified government support is essential and is most likely to be achieved by discussion and negotiation at the highest level and through the VPA negotiating process.

4.2 NGOs

The growing sophistication of NGOs within the region, particularly in Ghana, provides some encouragement that the drive for reform is growing. Throughout the region, forestry and conservation projects are being jointly supported by local NGOs and larger international conservation organizations such as Worldwide Fund for Nature (WWF), Flora & Fauna International, Birdlife and Conservation International.

The NGOs have a variety of different agendas aiming to tackle forestry sector issues. These include campaigning, advocacy, conservation, community support and forest management improvements. Different activities and projects being undertaken by selected NGOS are shown in Table 7.

NGOs now form a lobby group, which, to a greater or lesser extent depending on the country, is actively engaged in shaping public opinion and influencing government practice. Projects are testing possible reform options and establish a basis for environmental education. The role that NGOs can play is becoming more significant and support to increase participation in public debate, or direct funding of projects may constitute one of the most promising routes to achieving urgently needed reforms.

4.3 Timber Industries & Trade Organizations

The timber industries, chainsaw loggers and wood traders are, in some cases, well organized into associations and understand the problems faced by the timber industry. There is concern within such organizations that governments are providing inadequate control and a belief that their nationwide intervention can complement, or even replace, government efforts to control the industry, through self policing of members and prevention of illicit activity by outsiders.

4.4 FLEGT

European markets are of continued importance to the region and this puts the EC, through the FLEGT initiative, in a unique position to influence reform by VPA negotiation and LAS development. By resisting any push for the exclusive participation of only governments in the negotiating process, the EC is able to

ensure wider debate and greater participation involving the experience and aspirations of NGOs and the timber industry. Such participation is essential if reforms that are unpalatable to government, such as industry downsizing, are to be given any proper consideration. The EC's position of influence also enables it to ensure that the highest levels of government are informed and aware of the issues.

The further importance of the EC is that it is in a position to raise international awareness and to bring to wider attention the need for reforms. This is particularly relevant with respect to China and India, as the timber industries and traders of both nations are extending the search for timber raw material, often with scant regard for the environmental consequences and a disregard for legality. In one country information was given anonymously that trading is being supported by the Indian Government providing subsidies of €100/m^3 for imported raw material. It is believed that a similar advantage is being offered to Chinese traders. There was no official confirmation of the practice, but it is allegedly widespread in West Africa. This discourages legal operations which cannot afford to compete with the distorted market prices.

To avoid undermining the FLEGT initiative it is crucial that the EC uses its position of influence to encourage the Governments of China and India to play an active role in ensuring responsible practice by the nationals of both countries and explores ways that this may be done through greater cooperation. Actions to be encouraged should include the abolition of environmentally damaging subsidies and support for local industry development through policies prescribing only the import of at least semi-processed timber products.

The further importance of the EC is that it is in a position to raise international awareness and to bring to wider attention the need for reforms. This is particularly relevant with respect to China and India, as the timber industries and traders of both nations are extending the search for timber raw material, often with scant regard for the environmental consequences and a disregard for legality.

Table 7 West Africa - Selected NGO Activities

Name	Country	Description
ADT-Togo	Togo	Advocacy & Campaigning
Afrique Nature international	Ivory Coast	Conservation & community forestry projects
ASED	Benin	Conservation & community forestry projects
AVADEG	Guinea	Conservation & research
Care International	Ghana	Community forestry projects
Civic Response	Ghana	Advocacy
COMET	Togo	Conservation & community forestry projects
ECOLO Benin	Benin	Conservation & community forestry projects
FONGTO	Togo	Community forestry projects
Guinée écologie	Guinea	Conservation & community forestry projects
Green Scenery	Sierra Leone	Advocacy & Campaigning
ICCO	Ghana	Forestry projects with chainsaw loggers
La croix verte de Côte d'ivoire	Ivory Coast	Community forestry projects
Nigerian Conservation Foundation	Nigeria	Conservation & community forestry projects
Sierra Leone Conservation Society	Sierra Leone	Conservation & community forestry projects
SNV	Benin	Advocacy & community forestry projects
Sustainable Development Institute	Liberia	Research & advocacy
Wildlife Conservation Society	Nigeria	Conservation & community forestry projects

4.5 Certification

While forest management and Chain-of-Custody (COC) certification can provide an indication that forest sector practices are in compliance with an acceptable standard, interest is not widespread in West Africa. Of the two major international schemes, the Forest Stewardship Council (FSC) and the Programme for the Endorsement of Forest Certification schemes (PEFC), only the FSC is represented in the region. The regional office of FSC Africa is located in Ghana and has held workshops on certification in Ghana and Ivory Coast. National initiatives aiming to establish a national standard exist in both Ghana and Ivory Coast.

The Pan African Certification Scheme has been developed by the African Timber Organization (ATO), with the assistance of the Centre for International Forestry, based on principles, criteria and indicators of the International Timber Trade Organisation (ITTO), but the scheme has not been adopted anywhere in the region despite a number of countries being ATO members.

Ghana has been in the process of establishing certification systems since 1996, when a National Committee on Forest Certification (NCFC) was created. The Ghana Forest Management Certification System project was initiated with the assistance of the EC and the Netherlands. Since 2002 there have been field tests on COC and log-tracking systems and ongoing development of standards for sustainable forest management. Samaratex Timber & Plywood's concessions were certified in 2003 by SGS to be in compliance with Ghana's logging and COC standards, but otherwise no wider uptake has been reported.

To date no FSC certificates have been awarded in the entire region for either forest management or COC, though the WWF Ghana Forest & Trade Network (GFTN) now has five members with membership being a commitment to certification (see Section 7.2). In Guinea, Foret Forte has recently been audited and is currently in compliance with almost 80% of the FSC standards. In Ivory Coast Inprobois is attempting to achieve certification of its forest resources.

5. Summary Observations & Conclusions

Sections 6 to 13 contain individual country reports providing known or assumed information about the timber trade, control procedures and traceability. Details are summarized in Table 8 in English and Table 9 in French.

The key problem is the general lack of effective enforcement of forest harvesting regulations allied to the incidence of corrupt practices, which is permitting widespread illegal activity, both in forest harvesting and in the domestic and export trade. To overcome this problem, electronic timber tracking is an essential requirement (see Section 2.5). Effective implementation would provide the basis to control what is happening in the forest and to regulate the timber trade. Very importantly, a suitable system can also monitor the activities of field staff and so support the eradication of pervasive corruption. Deployed on a national basis, timber tracking would result in some improvement, but full benefits would require that a standard approach is developed throughout the region and that all nations make a commitment to prevent the import of illegal timber.

A further problem is the lack of knowledge about total timber use in the region, and the general lack of statistics, which are needed as a proper basis for planning and policy decisions. This is particularly the case for local market requirements and overland exports, which are less regulated than maritime exports. Timber trade associations should be engaged in a process that establishes rules and licensing conditions for operation within the sector, which should include a requirement to furnish wood trade statistics and to cooperate in prevention of illegal activities by members and non-members.

Statements of government commitment to environmental protection and sustainable forest management sound empty when viewed alongside the poor performance and lack of interest shown by the authorities responsible for regulating the forest sector and the trade. Every effort has to be made to impress upon governments the need for concrete action such as eradication of exports and imports of illegal timber, adoption of timber tracking systems and effective licensing and regulation of the entire forestry sector.

In Nigeria, where forest management has almost completely collapsed, along with formerly large exporting industries, there is a clear example of the consequences for other countries if effective action is not taken. Moreover, meeting the demand for wood from Nigeria will be a growing burden on remaining forest resources in other parts of West Africa. Efforts have to be made to reverse poor management practices, particularly in plantations, to ensure a future sustainable supply of timber.

Unrealistic strategies include:

- the assumption that current levels of harvesting, processing and trade can be supported from the region's remaining forest resources
- the approach being followed by Nigeria, which has to be based on the underlying assumption that timber will always be available from elsewhere.

Comparative analysis of the export and customs procedures throughout West Africa shows a strong similarity between systems and the roles of the government forestry and customs authorities, the former responsible for verification of exports and contract conformity and issuing certificates of origin, and the latter for final inspection against export and loading statements, but in all countries implementation demonstrates weaknesses and widespread opportunity to circumvent requirements.

The trend in the timber market is that there is booming local demand for low-grade and low-cost timber and plywood. Much of this is for the construction industry within West Africa and also the Sahel countries, which are deficient of timber and processing industries. The EU, which for a long time has been a strategic market for timber from the region, is becoming less important while the importance of the Indian and Chinese markets is expanding, particularly for teak and false-teak.

Migration and settlement of refugees within the ECOWAS region and the expanding presence of Lebanese, Indian and Chinese buyers are increasing pressure on resources. Problems of exercising control and prevalent rumours that illegal activity is encouraged are facilitating deregulation of timber

harvesting, transport, trade and industry. One particular example is the Ivory Coast where, among 140 registered timber processors, only half are conducting any activities and there are estimated to be approximately 70 new companies often unskilled in timber business, operating largely illegally and only concerned about quick profits.

As well as being a vehicle to ensure that only legally produced timber is imported into the EU, the FLEGT process should encourage a sensible appreciation of the problems faced by the forestry sector throughout West Africa.

Table 8 Summary of Issues by Country (all figures for 2007 unless otherwise stated)

Country	Benin	Ghana	Guinea Conakry	Ivory Coast	Liberia	Nigeria	Sierra Leone	Togo
Forest Resources	2.3 million ha (forest & savannah) 351,000ha of protected forests 14,000ha of teak plantations managed by ONAB	5.5 million ha (forest & savannah) 1.2 million ha of forest reserve and additional forest in off-reserve areas	6.7 million ha (forest & savannah) 312,000ha in Guinée forestière zone including 260,000ha of protected forests Some timber potential in moyenne and haute Guinée zones Unknown areas of scattered teak plantations	10.4 million ha (forest & savannah) 4 million ha of concessions (PEF) 4 million ha protected & managed by SODEFOR 168,000ha of plantations, mainly teak	3.4 million ha (forest & savannah) 2.4 million ha of dense forest 1 million ha open dense forest	11.1 million ha (forest & savannah) 2 million ha of forest reserve in high forest zone 975,000ha of forest reserve estimated to be productive 2.3 million ha in off-reserve forests estimated to be partially productive	2.8 million ha (forest & savannah) 400,000ha of forest reserves & protected forests 635,000ha of closed high forest 260,000ha of secondary forest	500,000ha (forest & savannah) 27,000ha of teak & eucalyptus plantations under state & private ownership 400,000ha in Plateaux Region converted to agriculture since 1999 & remain degraded
Utilization	46,000m^3 (official harvest) 44,000m^3 (unofficial harvest)	2 million m^3 AAC 935,000m^3 officially harvested (2005) 2.3 million m^3 estimated unofficial harvest (2005) by formal industries & chainsaw loggers	46,000m^3 officially harvested by Forest Forte Unknown volumes of teak harvested by Joseph Bitter	1.4 million m^3 official production from forest reserves & 120,000m^3 from protected forests 100,000m^3 from teak plantations ~1.5 million m^3 illegal harvesting	Formerly only illegal production of unknown volume, but now official logging under TSCs & FMCs Sustainable harvest thought to be 800,000m^3	Minimal legal production supplying exporting industries Unknown levels of illegal production supplying domestic & export markets	Logging ban recently lifted & unknown volumes being harvested illegally by chainsaw loggers	34,000m^3 harvested from protected forest 1 million tonnes consumed as fuelwood
Illegal Harvesting	~50%	~1.7 million m^3 which supplies ~40% of formal industry needs & >80% of informal sector needs	~80 to 90%	~50%	100% prior to commencement of TSCs & FMCs	40% of supply to official industries & nearly 100% of supply to local & regional markets	100% prior to lifting of logging ban	75%
Forest Industries	Limited industries are facing raw material shortages because of high level of teak exported to India 1 state-owned (Saclo), a few small companies & many log-yards	7 million m^3 processing capacity concentrated in 10 leading companies located mainly in Kumasi & Takoradi Large informal sector sourcing from illegal chainsaw gangs	Recently developed industry with only two companies legally exporting & high incidence of illegal activity Official processing capacity less than 50,000m^3	Large industry processing 2.4 million m^3 sourced officially from forest areas, protected forests & illegally	No major industries in operation	Industry in decline due to shortage of timber supply. Mostly concentrated in Edo State & permitted to export semi-finished & finished products	Rudimentary industries mainly producing rough-sawn lumber	Industries mostly inactive due to timber supply shortages as a result of high level of exports from state-owned teak plantations to China & India

Country	Benin	Ghana	Guinea Conakry	Ivory Coast	Liberia	Nigeria	Sierra Leone	Togo
Timber Trade	3,000t (sawnwood & mouldings) to EU ~48,000m^3 to China & India (largely illegal teak & false-teak) Logs & sawn-timber (unknown volumes) to Togo & Sahel	407,000m^3 official maritime exports including 127,000m^3 of teak 122,000m^3 official regional exports ~300,000m^3 unofficial regional exports ~300,000m^3 official & unofficial domestic sales 290,000m^3 recorded imports of wood products (2005) ~200,000m^3 unrecorded imports of teak	8,740t officially exported to EU, mainly sawn-timber ~60,000t (2,500 containers) exported illegally Unknown volumes exported overland	350,000m^3 officially exported to EU & 170,000m^3 to other destinations (processed products) 245,000m^3 officially exported to China & India (logs, sawn-timber & poles) ~200,000m^3 of teak logs illegally exported to Ghana ~100,000m^3 officially exported within the region & unknown volumes of unofficial exports Alleged illegal supply from Ghana, Liberia & Guinea Conakry	~626,000m^3 of exports (2000) with those to EU exceeding 200,000t (2001 & 2002) prior to UN ban on exports Minimal exports to EU recorded in 2004 & 2007 Evidence/allegations of illegal exports of sawn-timber by sea & overland to Ivory Coast, Guinea Conakry & elsewhere	Minimal export trade in wood products (11,000t to EU), but 85,000t of charcoal exported to EU 74,000m^3 of plywood imported from Ghana & increasing Small but unknown volumes of logs sawn-timber & poles exported regionally Unknown volumes of teak & gmelina logs exported to China & India 10 million m^3 of logs & sawn-timber estimated to be supplied to local markets Alleged imports from Cameroon	Minimal known exports (1,158t exported to the EU) Unknown volumes of illegal exports overland to Guinea Conakry & Liberia & by sea to China	9,700t recorded as exported (2005) with 1,172t to EU Unknown volumes of teak exported to India 96,000m^3 of false-teak unofficially exported to China 90,000m^3 imported from neighbouring countries
Certification	No activity	Samaratex, Ghana Primewood, John Bitar & Co., Logs & Lumber & Scanstyle Mim are members of GFTN & aiming for FSC Certification of areas totalling 330,000ha FSC Regional Office is in Ghana	Foret Forte in compliance with 80% of FSC criteria at recent audit	Inprobois is aiming to become FSC certified SODEFOR, funded by OAB has developed principles & criteria for sustainable forest management	No activity	No activity	No activity	No activity

Country	Benin	Ghana	Guinea Conakry	Ivory Coast	Liberia	Nigeria	Sierra Leone	Togo
Control of Timber Movement	Controls are largely ineffective & unable to prevent illegal logging done at night in protected forests	The Forestry Commission's FSD is meant to check official harvesting at stump, but apparently not often done Timber in transit is inspected at TIDD checkpoints, but corruption is reported & controls are easily circumvented Controls do not hinder movement of illegal timber harvested by chainsaw gangs	Chainsaw permits are issued, but no control is exercised over harvesting by villagers Timber exports were banned in early 2008	Many checkpoints are operated by customs, forest officials, police and army, but provide almost no control Bribes paid at checkpoints allow routine movement of timber without inspection	No control has been exercised over harvesting & timber movement is made quasi-legal by payment of fees for issue of an official waybill Now SGS are contracted to establish COC procedures & manage movement & export of timber, but will only cover official logging under TSCs & FMCs	Control is the responsibility of state forest authorities, but control of harvesting is no longer exercised Official waybills are issued to allow transport of timber, whether legal or illegal & there is no effective control	MAFFS's Forestry Division issues licences for transport of timber & operates checkpoints, but even during the logging ban there was no control of timber movement & bribes are routinely paid Cooperation between forest authority, police & customs is poor	The Ministry of Forestry issues transport documents for timber, but provides no effective control that would detect or prevent illegal timber operations
Timber Tracking	No effective procedures in operation	Paper based system in operation to track official production from concessions In theory there is inspection at stump & then transport documents are issued, which identify source licence area	No effective procedures in operation except in Foret Forte areas where COC is implemented as part of the effort to achieve certification	Test being implemented of timber tracking system by SGS with three companies (Inprobois, NSA & NSBF)	Electronic timber tracking now being implemented by SGS (see above)	No effective procedures in operation	No effective procedures in operation	No effective procedures in operation

Country	Benin	Ghana	Guinea Conakry	Ivory Coast	Liberia	Nigeria	Sierra Leone	Togo
Export Procedures	Exporter requires Conformity Certificate and Export statement issued by the Ministry of Forests after inspection of timber A loading Statement is prepared by Customs after satisfactory check of Conformity Certificate, Bill of Consignment & Letter of Credit. Cargo is then released for export A computerized system (SYGUCE) is being introduced	Export Permits are issued by the Forestry Commission's TIDD after checking exporter status, contracts, mill input/output records & financial documentation Customs jointly inspect export consignments with TIDD & containers are then sealed Exporter prepares a Customs Export Declaration & after inspection of all associated documentation, consignment is released for export	Exporter requires Conformity Certificate & an Export Certificate issued by the Ministry of Forests after inspection of timber A Customs Statement is prepared by Customs after satisfactory check of documentation & cargo is then released for export A computerized system (SYDONIA) is being introduced	A Specific Statement describing the consignment & a Certificate of Origin are issued by DG MINEEF A Customs Statement is completed by the exporter & after inspection by Customs a Loading Statement is issued The commercial bill is made with VAT, later reimbursed to the exporter	The exporter must have an Export Licence for each consignment, which is issued by SGS after confirmation that products have valid COC to confirm origin Customs will issue a release document subject to the consignment having a valid Export License and satisfactory pre-shipment inspection Inspection was formerly contracted to Bivac, but SGS has now taken over this role	FDF issue letters supporting export after checking various requirements including confirmation of source & legality, although there is no practical way in which this can be achieved & FDF do no physical checking The Ministry of Finance issues Export Permits on receipt of FDF support letter The Exporter submits an application to customs with relevant documents including a Clean Certificate of Inspection provided by Cobalt Inspection Services. Inspection may be done jointly with customs & forestry officials before the container is sealed & customs issue a Cargo Release Order	MAFFS issue Export Permits on payment of appropriate fees Export consignments are meant to be inspected by forestry & customs officials before container sealing, but customs claim that this rarely happens due to poor collaboration & containers may be sealed by shipping agents After inspection of documents customs will authorize release for export to port authorities & the container will be inspected by scanning before final release.	The exporter must provide a Conformity Certificate with details of species, origin & product for checking by forestry officials An Exportation Statement is issued by the Ministry of Forests after checking terms of business & payment After final inspection by customs a Loading Statement is issued & containers can be loaded & sealed for export

Country	Benin	Ghana	Guinea Conakry	Ivory Coast	Liberia	Nigeria	Sierra Leone	Togo
Trends	Timber shortages are limiting local processing Growing demand from India for teak & Chinese for false-teak	Exports to Europe declining Shortage of timber has resulted in factory closures & consolidation, with sources abroad attracting increasing interest The regional market, particularly Nigeria, is growing in importance & the Sahel remains an important market, largely for illegal timber	Increasing illegal exports to China of false-teak & other species	Many factory consolidations & increasing development of secondary processing Europe exports are declining, but increasing exports to other African nations & China & India	Issue of TSCs & FMCs will allow legal export, but industry not well developed & likely to be mainly logs at present Local demand is likely to continue to be met from uncontrolled chainsaw logging	Nigeria is now a net importer of timber, including plywood from Ghana Local demand for sawn-timber is still met largely from uncontrolled harvesting of local sources, but can be expected to shift increasingly to other producing nations in the region	Very limited exporting industries & supply is mainly for local market Illegal exports to China have been increasing & this trend is likely to continue without improved enforcement	Industries face chronic shortages of wood Togo is a net importer of timber, mainly plywood & sawn-timber from Ghana supplied both legally & illegally Logs are illegally sourced from protected forests in Benin

Table 9 Résumé des Informations par Pays (ensemble des données pour 2007 sauf indication contraire)

Pays	Bénin	Ghana	Guinée Conakry	Côte d'Ivoire	Libéria	Nigéria	Sierra Leone	Togo
Les ressources forestières	2,3 millions ha forêts et savanes 351 000ha de forêts classées 14 000ha de plantations de teck gérées par l' ONAB	5,5 millions ha forêts et savanes 1,2 million de réserves et compléments dans les forêts classées	6,7 millions ha forêts et savanes 312 000ha en Guinée forestière dont 260 000ha en forêts classées Bon potentiel de bois en moyenne et haute Guinée zones Inconnues disséminées de plantations de teck	10,4 millions ha forêts et savanes 4 millions ha de concessions forestières (PEF) 4 millions ha de forêts classées gérées par la SODEFOR 168 0000ha de plantations principalement de teck	3,4 millions ha forêts et savanes 2,4 millions ha de forêt dense 1 million ha de forêt ouverte	11,1 millions ha forêts et savanes 2 millions ha de réserve forestière en zone de haute forêts 975 000ha de réserves classées productives 2,3 millions ha de forêts communautaires classées partiellement productives	2,8 millions ha forêts et savanes 400 000ha de réserves et de forêts classées 635 000ha de haute forêt fermée 260 000ha de forêt secondaire	500 000ha forêts et savanes 27 000ha de plantations d'Etat et privée de teck et eucalyptus 400 000ha de forêts classées dans la région des plateaux la moitié dégradée et converties en zone agricole depuis 1999
La production de bois	46 000m^3 coupe de bois officielle 44 000m^3 coupe informelle	2 millions m^3 coupe annuelle 935 000m^3 coupe officielle (2005) 2,3 millionnm^3 coupe informelle estimée par les industries et les coupeurs à la tronçonneuse	46 000m^3 officiellement coupé par Foret Forte Volumes inconnus de teck récolté par Joseph Bitter	1,4 million m^3 de grumes coupés dans les réserves (PEF concessions) dont 120 000m^3 en forêts classées 100 000m^3 dans les plantations de teck Environ 1,5 million de m^3 coupe illégale	Précédemment seule une production illégale de volume inconnu mais maintenant les coupes sont officielles et sous contrats TSC et FMC Récolte durable estimée à 800 000m^3	Production légale minimale fournissant les industries d'exportations Volumes inconnus de production illégale alimentant les marchés nationaux et d'exportations	Interdiction de coupe forestière récemment levée et volumes inconnus illégalement extraits par les coupeurs à la tronçonneuse	34 000m^3 extrait des forêts classées 1 million tonnes consommées pour le bois de chauffe
Les coupes illégales	Environ 50 %	Environ 1,7 million m^3 qui alimentent environ 40% des besoins formels de l'industrie et >80% des besoins du secteur informel	De l'ordre de 80% à 90%	Environ 50%	100% avant le début des TSC et FMC	40% des apports vers les industries officielles et presque 100% des apports vers les marchés locaux et nationaux	100% avant la levée de l'interdiction des coupes	75%

Pays	Bénin	Ghana	Guinée Conakry	Côte d'Ivoire	Libéria	Nigéria	Sierra Leone	Togo
Les industries du bois	Les industries limitées rencontrent des difficultés d'apports en bois dues aux fortes exportations de teck vers l'Inde 1 usine publique (Saclo) co-gérée ONAB-GTZ et quelques compagnies de petite à moyenne taille	7 millions m^3 de capacité de transformation concentrée dans 10 principales compagnies situées à Takoradi et Kumasi Secteur informel important alimenté par les groupes illégaux de tronçonneuses	Industrie récemment développée avec seulement deux compagnies accréditées pour l'export et beaucoup d'opérateurs illégaux (notamment miniers) Capacité officielle de transformation moins de 50 000m^3	Grosses industries de transformations de 2,4 millions m^3 alimentée officiellement par les zones forestières et forêts classées et aussi illégalement	Pas d'industries majeures en activité	Les industries du bois en déclin en raison du manque d'apports en bois Principalement concentré dans l'Etat d'Edo autorisant l'export de produits finis et semi-finis	Industries rudimentaires produisant principalement des planches grossières	Les industries sont peu actives en raison des pénuries de bois résultant des préférences de l'ODEF et de ses plantations publiques de teck qui approvisionnent les acheteurs Indiens et Chinois
Le commerce du bois	3 000t exportations vers l'UE (bois scié, moulures) Environ 48 000m^3 vers la Chine et l'Inde (principalement teck et faux- teck) Grumes et bois scié volumes non connus vers le Togo et Sahel	407 000m^3 exportations maritimes officielles incluant 127 000m^3 de teck 122 000m^3 exportations régionales officielles Environ 300 000m^3 vente domestique officielle et non-officielle 290 000m^3 importations enregistrées de produits ligneux (2005) Environ 200 000m^3 d'importations de teck non-enregistrées	8 740t exportations officielles vers l'UE principalement des bois sciés Environ 60 000t (2 500 containers) exportés illégalement Volumes inconnus exportés par voie terrestre	350 000m^3 exportations officielles vers l'UE et 170 000m^3 vers d'autres destinations (produits finis) 245 000m^3 exports officiels vers la Chine et l'Inde (grumes, bois sciés, poteaux) Environ 200 000m^3 de grumes de teck illégalement exportées vers le Ghana Environ 100 000m^3 export officiels dans la région et volumes inconnus Apports présumés illégaux du Ghana, Libéria et Guinée Conakry	Environ 626 000m^3 d'exportations (2000) dont celle pour l'UE supérieures à 200 000 t (2001 & 2002) avant les interdictions d'exportations imposées par l'ONU Exportations minimales vers l'UE enregistrées en 2004 & 2007 Preuves et suppositions d'exportations illégales de bois sciés par mer et terrestre vers la Côte d'Ivoire, la Guinée Conakry et autres destinations	Peu d'exportation de produits forestiers (11 000t pour l'UE), mais 85 000t de charbon de bois exporté vers l'UE 74 000m^3 de contreplaqué importé du Ghana en augmentation Faible volumes inconnus de grumes, bois scié et poteau exporté dans larégion Volumes inconnus de teck et gmelina exportés vers la Chine et l'Inde 10 million de m^3 de grumes et bois scié estimés alimentent le marché local Importations supposées de bois du Cameroun	Exportations minimales connues (1 158t exportées vers l'UE) Volumes inconnus d'exportations illégales terrestres vers la Guinée Conakry et le Libéria et par voie maritime vers la Chine	9 700t d'exportations enregistrées (2005) dont 1 172t vers l'UE Volumes inconnus de teck exporté vers l'Inde 96 000m^3 de faux-teck exporté illégalement vers la Chine 90 000m^3 de bois importé des autres pays riverains

Pays	Bénin	Ghana	Guinée Conakry	Côte d'Ivoire	Libéria	Nigéria	Sierra Leone	Togo
La certification	Pas d'activité	Samaratex, Ghana Primewood, John Bitar & co, Logs & Lumber & Scanstyle Mim sont des membres de GFTN et souhaitent faire certifier en FSC un total de 330 000ha	Foret Forte rempli 80% des critères FSC après un récent audit	Inprobois en cours de certification FSC SODEFOR, financé par l'OAB a développé des principes et critères pour une gestion durable des forêts	Pas d'activité	Pas d'activité	Pas d'activité	Pas d'activité
Le contrôle des flux de bois	Contrôles sont largement inefficaces et incapables d'empêcher les coupes illégales effectuées la nuit en forêts classées à Prèkètè, Bassila origine et documents de transports délivrés par le Togo	La commission des forêts FSD est supposée vérifier les coupes officielles des souches, mais apparemment rarement fait Le bois en transit est inspecté aux points de contrôles du TIDD mais la corruption rapportée et les contrôles sont facilement évités les contrôles N'entravent pas la circulation des bois illégalement coupés par les groupes de tronçonneuses	Les permis de coupes sont délivrés aux tronçonneurs, sans aucuns contrôles de coupes en excès effectuées par les villageois Les exportations de bois ont été interdites début 2008	Beaucoup de points de contrôles sont tenus par les douanes, les agents des forêts, la police et l'armée) plus motivés par le prélèvements de pots-de-vin que par les contrôles à effectuer facilitant ainsi les mouvements de bois	Aucun contrôle n'a été exercé pendant les coupes forestières et le transport du bois est quasiment légal après paiement de frais au FDA pour la délivrance de laissez-passer officiels Maintenant SGS est chargé d'établir des procédures COC et de gérer la circulation et l'exportation du bois mais uniquement dans le cadre des coupes officielles et des contrats TSC et FMC	Le contrôle est la responsabilité des autorités forestières de l'Etat, mais le contrôle des coupes n'est plus du tout exercé Des laissez-passer officiels sont délivrés pour permettre le transport du bois sans se soucier s'il est légal ou illégal et il n'y a pas de contrôles effectifs	La division des forêts du MAFFS délivre des permis de transport du bois et gère des points de contrôles, mais même pendant l'interdiction des coupes forestières il n'y avait pas de contrôle des flux de bois et des pots-de-vin étaient régulièrement acquittés La collaboration entre les autorités forestières, la police et les douanes est faible	Laissez-passer et permis de coupes sont facilement délivrés par la DG des forêts mais n'offrent aucuns contrôles effectifs qui pourraient empêcher les activités illégales de bois
La traçabilité des bois	Aucune mesure efficace en place	Le système papier est utilisé pour suivre la production officielle dans les concessions En théorie il y a des inspections à la souche et ensuite des documents de transports sont délivrés, qui donne	Aucune mesure efficace en place sauf pour Foret Forte où le COC est mis en place en plus des efforts pour arriver à la certification	Des tests sont en cours d'exécution de système de suivi des bois par SGS avec trois compagnies (Inprobois, NSA & NSBF)	Le suivi électronique des bois est maintenant mis en place par SGS (cf au-dessus)	Aucune mesure efficace en place	Aucune mesure efficace en place	Aucune mesure efficace en place

Pays	Bénin	Ghana	Guinée Conakry	Côte d'Ivoire	Libéria	Nigéria	Sierra Leone	Togo
		l'origine de la source et du permis						
Les procédures d'exportation & douanières	L'exportateur requiert le certificat de conformité et le certificat d'export délivré par la DGFRN après inspection du bois Une bon de chargement est préparé par les douanes après les vérifications conformes du certificat de conformité, facture de chargement et lettre de change. Le fret est ensuite autorisé à l'export Un système de guichet unique électronique regroupant toutes les démarches est en train d'être introduit (SYGUCE)	Les permis d'exportations sont délivrés par la commission forestière TIDD après vérification de l'entité juridique, contrats de l'exportateur, usine et documentation financière Les douanes inspectent conjointement les chargement d'export avec TIDD et les containers sont scellés L'exportateur prépare une déclaration d'exportation en douanes et après inspection de tous les documents associés, le chargement est autorisé à l'export	L'exportateur requiert un certificat de conformité et un certificat d'export délivré par le ministère de forêts après inspection du bois Une attestation de douanes est préparée par les douanes après avoir satisfait aux contrôles des documents et du fret qui est ensuite autorisé à l'export Un système électronique d'enregistrement (SYDONIA) est entrain d'être introduit	Un certificat spécifique décrivant le chargement et un certificat d'origine sont délivrés par la DG du MINEEF Un certificat des douanes est complété par l'exportateur et après inspection par les douanes un bon de chargement est délivré La facture commerciale est établie avec la TVA qui sera ultérieurement reversée à l'exportateur	L'exportateur doit avoir un permis d'export pour chaque chargement, qui est délivré par SGS après confirmation que les produits sont conformes COC et origine Les douanes délivrent un document de sortie en fonction du chargement possédant un permis d'exportation valide et une inspection pré-chargement satisfaisant pour le FDA L'inspection était auparavant effectuée par Bivac et maintenant prise en charge par SGS	FDF délivre des lettres appuyant l'export après vérification de différents documents incluant la confirmation de la source de légalité bien qu'il n'y ait aucun moyen pratique de le vérifier et FDF ne fait pas d'inspection physique Le ministère des finances délivre des permis d'exportation à réception des lettres de soutien du FDF L'exportateur soumet une demande aux douanes avec les documents incluant un certificat en règle de l'inspection effectuée par Cobalt inspection services. L'inspection peut être faite conjointement avec les douanes et les agents forestiers avant que les containers soient scellés et les douanes délivrent un bon de sortie du chargement	Un permis d'export est délivré par le MAFFS après paiement des frais correspondant Les chargements d'exportations sont supposés être inspectés par les agents des forêts et des douanes avant de sceller les containers, mais les douanes indiquent que cela n'est jamais effectué en raison du peu de collaboration et les containers peuvent être scellés par les agents du fret Après l'inspection des documents les douanes signifient la sortie pour l'exportation aux autorités portuaires et les containers seront inspectés par scanner avant leur chargement final	L'exportateur doit fournir un certificat de conformité comprenant les détails de l'espèce, son origine et type de produits pour inspection par les agents forestiers Une attestation d'exportation est délivrée par le ministère des forêts après vérification de la facture du mandataire et lettre de change Après l'inspection finale par les douanes un bon d'embarquement est délivré et les containers sont chargés et scellés pour l'exportation

Pays	Bénin	Ghana	Guinée Conakry	Côte d'Ivoire	Libéria	Nigéria	Sierra Leone	Togo
Les tendances du marché	La pénurie de bois limitent la capacité de transformation de l'industrie locale La demande croissante de teck pour l'Inde et de faux-teck pour les Chinois	Exportations vers Europe en déclin Les pénuries de bois ont entrainé la fermeture d'usines et des restructurations avec un intérêt pour des sources de bois extérieures Le marché régional, particulièrement au Nigéria, s'accroît fortement et le Sahel reste un marché important pour le bois illégal	Exportations illégales en augmentation croissante vers la Chine principalement (faux teck et acajou)	Nombreuses fermetures d'usines et restructurations transformations secondaires en augmentation Les exportations vers l'Europe sont en régression au détriment des marchés africains, indiens et chinois en forte expansion	La délivrance de contrats TSC et FMC va permettre des exportations légales, mais l'industrie est peu développée et uniquement en capacité de vendre des grumes La demande locale va continuer à être satisfaite pas des coupes incontrôlées à la tronçonneuse	Le Nigéria est maintenant un importateur net de bois, incluant le contreplaqué du Ghana, (grumes et bois débités du Cameroun) La demande locale pour le bois scié est encore largement satisfaite par des sources locales non-contrôlées mais on peut espérer à l'avenir bénéficier d'autres pays producteurs régionaux	Les industries exportatrices sont très réduites et fournissent principalement le marché local Les exportations illégales vers la Chine sont en croissance et cette tendance va se poursuivre sans des mesures concrètes d'application des réglementations	Les industries doivent faire face à des pénuries de bois chroniques Importateur net de bois principalement de contreplaqué et bois scié en provenance du Ghana fourni légalement et illégalement Les bois bruts sont illégalement coupés dans les forêts classées du Bénin

6. Benin Country Report

6.1 Introduction

Benin has developed large teak plantations, with GTZ assistance, and has maintained large protected forests under management plans. It has never been an important country for the timber trade, but it was self-sufficient and able to meet local demand for sawn-timber, poles and firewood (FAO, 2001). However, timber shortages have arisen in the last five years and Ghana and Nigeria have become the main suppliers. In recent years the demand for teak and false-teak, driven by Indian and Chinese exporters, has strongly affected harvest rates and trade of these species. Timber shortages are limiting local processing, and industries now survive by using wood often of unknown origin.

There is no coordination between forestry, customs and port authorities for collection of timber statistics and there are no records of informal trade.

6.2 The Forest Resource & Utilization

The FAO (2006) reports that Benin has about 2.3 million hectares of forest, which is 21% of the total land area and includes savannah woodland of limited commercial potential. Productive forests include 351,000 hectares in the protected forests of Agoua, Mount Kouffè and Wari-Maro, and a teak plantation of 14,000 hectares in Bohicon (see Annex 13 - Forest Map of Benin). The main timber species, iroko, samba and antiaris, are diminishing and other species now harvested include lingue and false-teak.

Teak plantations are managed by *Office National du Bois* (ONAB). The official yield is 46,000m^3 per year, and a further 44,000m^3 is thought to be extracted in excess of the planned quota.

6.3 Forest Industries

A state-owned teak mill, Saclo, in Bohicon is managed by ONAB for production of sawn-timber, veneer, flooring and moulding, but although supported by GTZ since 1983, it is poorly run with the management unchanged for ten years. The mill operates for only four days per week. Some of the equipment, including kiln driers, is non-operational or not well-maintained and at the time of the visit employees were holding a strike meeting.

Of the 46,000m^3 of teak logs officially harvested, 27,000m^3 are allocated to Saclo, about 15,000m^3 for sale mainly to Indians buyers and 3,000 to 4,000m^3 for sale to local, private operators. However, most of the teak is sold to the Indian buyers and even the Chinese wood processing factories in Benin cannot secure sufficient teak. It is unlikely that Saclo is receiving its full quota and much is being diverted as ONAB prefer to sell high-quality teak to the Indian buyers and, to the detriment of local industries, is not providing logs on time and at agreed quality.

Africa Teck, which is specialized in production of teak flooring and joinery, has a processing capacity of 500m^3 per year, but is only receiving 150m^3. The sawmill and kiln driers are not in use and staff have been reduced.

Shiatung SA in Bohicon is a Chinese run company, formerly processing teak, but obliged to change to other species, in particular squared false-teak and some lingue and iroko. Production is green sawn-timber, veneer and semi-processed flooring. Three containers per week are exported to China for final processing. Raw material was said to be from Togo and Nigeria, but it is considered likely to come from the protected forests of Agoua and Kouffè. The company hopes to produce one container daily to reach 300m^3 per month.

6.4 Timber Trade

Reported timber flows in Benin, with volumes where known, are shown in Map 2.

Local

Local log-yards and furniture industries are no longer getting teak from ONAB and rely on illegal supply of the indigenous species (false-teak, iroko, lingue, and samba).

Regional

Around 15 to 20 lorries per week, containing mostly plywood and samba from Ghana, are crossing the border between Togo and Benin at Illacondji in transit to Nigeria. No movement of timber was observed at Igolo on the Nigeria border with Benin.

There is considerable timber flow from chainsaw gangs operating mainly in protected forests and secondarily, in teak plantations. Between Pkrèkètè and Bassila along the border with Togo, near the border post three large log-yards were observed with small and big lorries (8 to 30m^3) being loaded by local villagers. Four lorries had just left and two more were already loaded. Most of the squared logs (afzelia and rose-wood) are extracted at night from the protected forests of Kouffè and Wiro-Mari for transportation to log-yards in Togo.

All lorries have legal documents from Togo stating that the wood origin is Togo. There are also some teak logs. Four large log-yards were observed along the border. Squared logs are cut during the night in the protected forest, sometimes 70 to 100km away, and then transported to log-yards using small lorries. The wood is primarily for export, but some is locally processed. The volume illegally extracted from protected forests could be 100,000m^3.

There is also some timber of the indigenous species iroko, lingue and samba flowing into Benin from Ghana, via Togo, and Nigeria and out to Sahel countries.

Photo 2 - Logyard, Benin

Squared teak & false-teak logs for export to China & India

International

Exports of timber products to Europe are only 3,040 tonnes and consist mainly of sawn-timber (56.8%) and mouldings (33.6%) (see Section 3.3, Table 5, Table 6 & Annex 5 - Benin Exports to the European Union). *Office National des Usagers du Bois du Bénin* (ONUB), a timber trade association, reported that as many as 300 containers per month may be illegally exported to India and China during the dry season, representing a trade of about 48,000m^3 per year of teak and false-teak.

Teak is exported without any processing to India as logs, and false-teak logs are squared and shipped to China. The ONAB mill in Bohicon is exporting teak veneer to Germany. Shiatung is exporting indigenous semi-processed sawn-timber and flooring for further processing in China.

6.5 Control of Timber Movement

Despite punitive operations to confiscate illegal timber, lorries and containers there is no effective control of illegal logging operations carried out at night in the large protected forests. The porosity of the border and the good road network facilitate timber movement within Benin and to neighbouring countries. There are only three forestry officials in Cotonou Port and they cannot easily check all the exported wood. They only check about 3,000m^3 per year which is a very small proportion of the reported export volume.

The level of effective enforcement is variable. Mobile armed forestry patrols at the Pkrèkètè border post were threatened by the local population loading timber on to lorries, whereas the Bassila cantonment post was full of confiscated logs mostly squared false-teak and also charcoal.

Customs procedures

The customs procedures require two key documents, the Conformity Certificate and the Export Statement.

The Conformity Certificate describes the timber species, wood origin and type of processed products, which have to be checked by a forest officer. The Conformity Certificate is required before an Export Statement is issued by the Ministry of Forests. Some products may be specifically inspected to verify that phyto-sanitary requirements are met.

The Export Statement contains a description of the exported wood, and financial details including the bill of consignment and letter of credit required to demonstrate that payment will be made to a local bank.

Customs officers will conduct a final check and issue a temporary or permanent loading statement permitting products to be loaded into a container for export.

The customs office has been implementing a new system since last year, SYGUCE (Système de Guichet Unique pour le Commerce Extérieur) for other exported goods, such as cotton, and will extend the system to cover timber exports.

Timber-tracking

There is no timber tracking system in effective operation in Benin.

6.6 Strengths & Weaknesses

Strengths

NGOs are numerous and strongly involved in social issues, but have limited capacity for involvement in forest resource management or trade issues. SGS is currently reinforcing its capacity to track timber and timber products, and has a strong interest in participating as external auditors in the FLEGT process.

Weaknesses

The understanding of FLEGT is very limited and restricted to the forestry administration which is not pro-active in distributing documentation to NGOs or professional associations. There is much confusion about forest certification and FLEGT. Information is needed to generate interest among professional and timber trade associations, and possibly financial incentives are required to support developments that might encourage engagement in the FLEGT initiative.

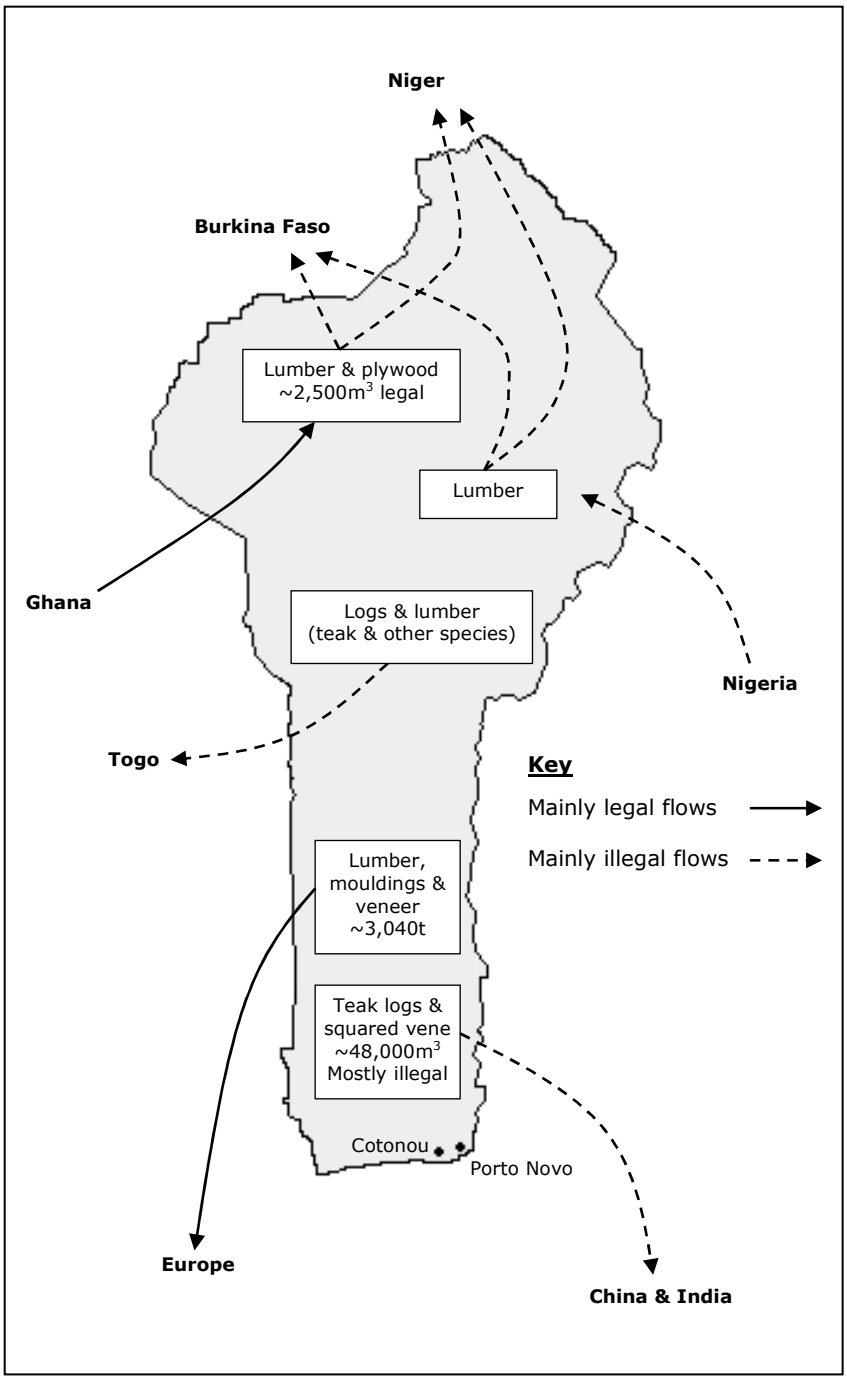
Turn-over of forestry and customs staff is high, and does not facilitate implementation of forest policy and enforcement. Both the forestry and customs administrations need to be reinforced.

Problems include lack of enforcement, the need for land tenure reform, the unprofessional attitude of timber traders interested only in a quick profit, uncontrolled extension of slash-and-burn agriculture for cashew plantations in protected forests and forest fires.

Needs

There is an urgent need for privatization of the state-owned teak processing industry and plantations, which were originally developed with GTZ support to ONAB. The Saclo mill is dying and the formerly well-managed teak plantations are being heavily degraded. Investment is essential to restore the potential of the teak plantations. Reforestation inside protected forests should be carried out in core areas with indigenous species, and with commercial species on the periphery.

Map 2 Benin - Timber Flows (2007)



7. Ghana Country Report

7.1 Introduction

Forestry and timber industries are of major importance to Ghana's economy. In recent years timber products have consistently been the third highest value export commodity after cocoa and gold. In the period from 2001 to 2005 official exports accounted for between 7 and 10% of export earnings. The average annual value was about $180 million from 2005 to 2007. During this period exports to the EU were decreasing in value and volume, but this was offset by sales to other regions and is discussed in Section 7.3.

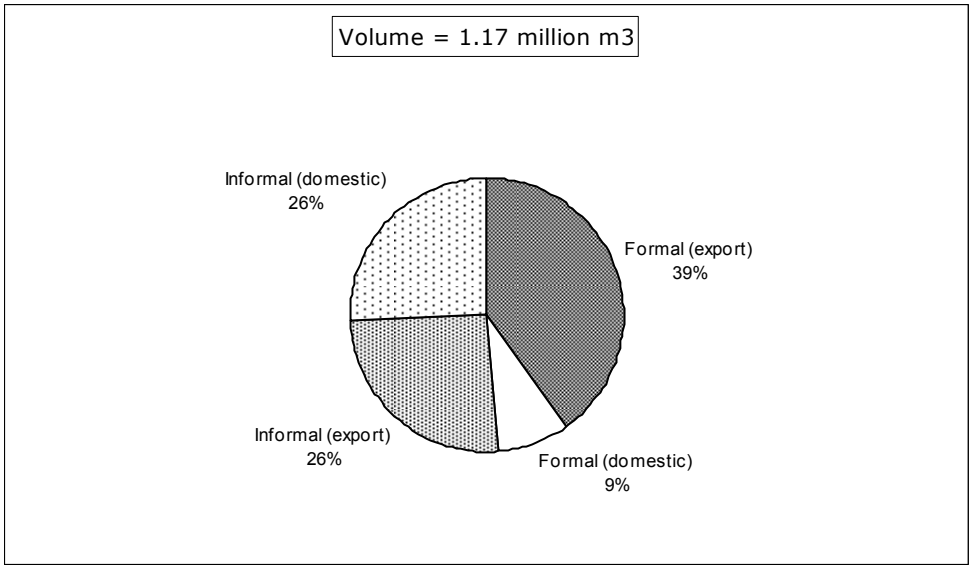
From 2000 to 2006, officially recorded export volumes have been in the order of 470,000m^3, but jumped in 2007 to 528,000m^3 (see Section 7.4). A further 100,000m^3, mainly plywood, was estimated to have been sold on the domestic market. Supplies to the local market and exports to neighbouring countries are derived largely from uncontrolled, illegal harvesting and are estimated to be about 600,000m^3 of sawn-timber (see Figure 5).

Conversion from logs to product at a conversion ratio of 36% indicates that the annual volume of logs harvested must be about 3.2 million m^3, although, until recently, the annual allowable cut has consistently been only 1.0 million m^3. If Ghana's forests continue to feed domestic and regional markets, and supply the needs of a substantial export industry at current levels, further depletion of the forest resource is inevitable.

The Ministry of Lands Forests and Mines has overall responsibility for forests. Executive power is vested in the Forestry Commission, which is responsible for policy coordination, forest conservation and management and regulation of resource utilization, including wildlife.

Ghana was notable in having accessible statistics covering the formal export trade, but in common with other countries only unsubstantiated rough estimates were available for the domestic trade and for much of the trade with other countries in the region.

Figure 5 Ghana - Break-down of Estimated Timber Sales by Sector (2006)



7.2 The Forest Resource & Utilization

The FAO reports that Ghana has about 5.5 million hectares of forest which is 24% of the total land area and includes savannah woodland with limited commercial potential. The Forestry Commission has direct responsibility for 1.2 million hectares of forest reserve and is also meant to regulate community based forestry activities in off-reserve forest areas.

The annual allowable cut set, until recently, at 1.0 million m^3 combined 500,000m^3 from forest reserve and 500,000m^3 from off-reserve forest, the latter intended for conversion to agriculture and to be a supplementary timber source pending maturation of plantations now being established. The standing volume in off-reserve forest has been estimated at between 30 and 40 million m^3, which, if correct, would allow continuation of this supply for at least 60 years. It is unlikely that this is realistic, as the EC Country Environmental Profile (2006) states that estimated closed canopy off-reserve forest was estimated as being from 100,000 to 350,000 hectares, which would mean a standing volume of anything from a very high 85m^3/ha to an impossible 400m^3/ha. Furthermore, it is reported that the off-reserve resource used to be the major source of timber in the 1990s on account of the very low levels of control exercised. It was the deliberate policy of Government to liquidate forest resources off-reserve for conversion to agriculture, especially cocoa. They succeeded to this end, far faster than anticipated and over-exploitation of the resource has caused extensive depletion, reportedly reducing the relative importance of off-reserve forest for timber production.

Because of log shortages, the annual harvest was increased in 2006 to 2.0 million m^3, with 1.5 million m^3 of this to be supplied from off-reserve forest areas, thus increasing the probability that this resource is being rapidly liquidated. The annual harvest from forest reserve remains 500,000m^3, although a recent review by the Department for International Development, UK (DFID) indicates that 350,000m^3 is a more realistic estimate of sustainable yield.

Traditionally, forest concessions were granted on a discretionary basis, but new legislation in 1998 decreed that award would be through a process of competitive bidding with an annual payment per hectare. There are unresolved issues regarding the amended procedures as former concessionaires are disputing previously established access rights and payment requirements. While this confusion remains, much of the logging, despite being sanctioned by government, is technically illegal.

Production from concessions goes largely to export oriented industries and although there is an obligation to sell 20% of product on the local market this either does not happen, or is inadequate to meet local demand. Local scarcity of timber has been overcome by the advent of logging by chainsaw gangs (see Section 2.2). This logging is uncontrolled, wasteful and illegal, but supplies the bulk of local requirements and regional exports from Ghana, and is also believed to be supplying mainline export processors.

Chainsaw logging gangs are a major problem for forest management in Ghana. It is reported that gangs are armed and operating at night and that there may be high level support for their activities. Local communities, disillusioned by deals struck between the loggers and chiefs, which bring them no benefit, are also reported to be involved. The solution suggested to the chainsaw logging problem is to license operations and allow harvesting, alongside concession operators, of unutilized species, but this has the danger that it will increase the off-take per hectare and reduce the likelihood that harvesting can be sustainable.

Within the NGO sector there is a strong drive for greater community involvement, to be encouraged through equitable benefit sharing. It is envisaged that communities would have responsibility for protection and sustainable harvesting of their own traditional forest areas. However, the communities have been implicated in destructive practices in both forest reserve and off-reserve forests, and many of the off-reserve forests in community areas are already reported to be seriously depleted. There has apparently been a marked enthusiasm, by communities, chainsaw loggers, industry and government, for rapid liquidation of forest resources in exchange for immediate cash earnings. For community based forest management to succeed activities would have to be very well regulated, but given the proliferation of chainsaw logging there is no evidence that this capacity exists within the Forestry Commission.

Samaratex is the largest concessionaire in Ghana, with concessions of 160,000 hectares, and has committed to achieving FSC certification by becoming the inaugural member of WWF's GFTN. A further four companies have since joined, namely Ghana Primewood, John Bitar & Co., Logs & Lumber and Scanstyle Mim. The total area now being managed in compliance with the GFTN requirement to achieve certification is nearly 330,000 hectares. Ghana Primewood has established its own security operation to combat the threat of chainsaw loggers because government intervention is considered to be highly inefficient, but despite this is struggling to impose effective control. The company believes certification may be possible within one year, but failure to control rampant illegal activity may prove to be a major obstacle.

7.3 Forest Industries

Industry is comprised of a formal and an informal sector.

The informal sector, widely dispersed in the vicinity of forests, is focused mainly on supply to the domestic and regional markets. It consists of small to medium sawmills, which are weakly regulated. Rough-sawn planks produced by chainsaw loggers are the principal raw material. The mills re-saw the

boards into dimensional sawn-timber, which is then legally transported within Ghana with official transport documents issued with disregard to the illegality of the supply.

The formal sector is largely based in Takoradi and Kumasi and has traditionally been focused on exports to Europe, but increasingly, plywood is being sold to Nigeria because of increasing demand due to closure of Nigeria's plywood industry. Furthermore, all sales are ex-factory and so more profitable than selling to Europe, where sales are on CIF (Cost Insurance & Freight) basis, meaning that the seller must bear freight costs. There is also no concern about the source or legality of raw material.

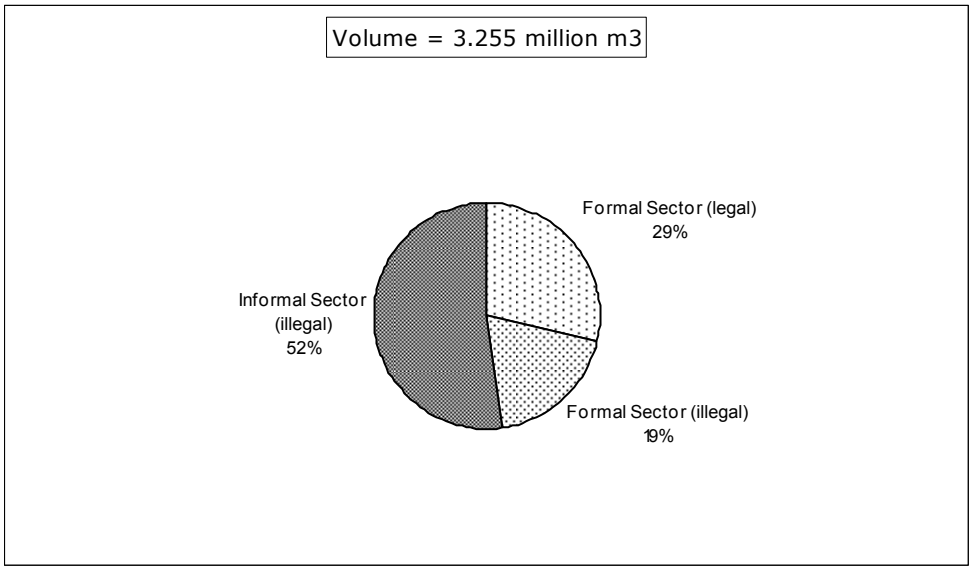
By 1999 Ghana's timber processing capacity had increased to 5.2 million m^3 and is now reported to be as high as 7.0 million m^3. The Government, recognizing that the capacity is under-utilized, hopes to promote Ghana as a regional processing hub producing superior quality products. This depends on adequate volumes of logs being available, but this may not be a realistic possibility. Other regional log sources are Liberia, which is estimated to have an annual allowable cut of only 800,000m^3, and the forested nations of the Congo basin, which are reportedly reluctant to sell logs to Ghana, preferring instead to develop local processing capacity. Furthermore, there is competition for available timber supplies within the region and increasingly from further afield, particularly China and India. Scaling down the industry to match available resources could be an alternative and sounder option.

Factory closures and consolidation have been taking place in the formal sector since 2000. Now, ten leading manufacturers account for 75% of total timber product exports. The decreasing number of factories is due to the growing scarcity of raw material. Log consumption by the formal sector has routinely exceeded the annual allowable cut by a large margin, but declined between 1999 and 2005 from about 2.0 to 1.6 million m^3. To counteract this, one major manufacturer has been able to obtain logs from Cameroon, is now pursuing options in Liberia, and is also considering relocation.

The officially recorded supply of logs to the formal sector in 2005 was 935,000m^3, but a total of about 1.6 million m^3 was processed, thus indicating the use of over 600,000m^3 from illegal sources. The informal sector is estimated to utilize the equivalent of about 1.7 million m^3 of logs so consuming over 50% of the total volume now harvested annually (see Figure 6). About 71% of the annual volume of logs harvested in Ghana is estimated to be illegal.

Evidence of the ease with which industry can obtain illegal logs was borne out by reports from a timber processor that undocumented logs are regularly offered for sale and, if declined, sellers are able to secure documents rapidly and without apparent difficulty.

Figure 6 Ghana - Industrial Log Supply (2005)



7.4 Timber Trade

Reported timber flows in Ghana, with volumes where known, are shown in Map 3.

The timber processing industries supply domestic, regional and international markets. The principal export products are sawn-timber, veneer and plywood. Local demand is mainly for cheap rough-sawn lumber, which sells at two-thirds of the average export sawn-timber price.

Very little data is available on the domestic trade, but annual consumption of processed timber is thought to be about 300,000m^3 of sawn-timber supplied by the informal sector and a further 100,000m^3, largely consisting of plywood, being supplied by the formal sector.

The breakdown of the value of exports in 2006 by market region, excluding domestic markets, is shown in Table 10 and in Figure 3, Section 3.4. Europe is by far the most important market followed by the Economic Community of West African States (ECOWAS) and America, principally the USA.

Exports reported by the Forestry Commission (see Table 10 & Table 12) are consistently less than the value of imports reported by Eurostats (see Section 3.3, Table 5, Table 6 & Annex 6 - Ghana Exports to the European Union) with the difference ranging from 19% in 2005 to 30% in 2007. Some difference would be expected if one set of statistics are using FOB values and the other are using CIF values, but the difference seems large and could indicate a considerable volume of unrecorded exports, probably therefore illegal, or fraudulent transfer pricing. For future comparison and monitoring, the EC should attempt to ensure that the reporting basis is consistent.

Map 3 Ghana - Timber Flows (2007)

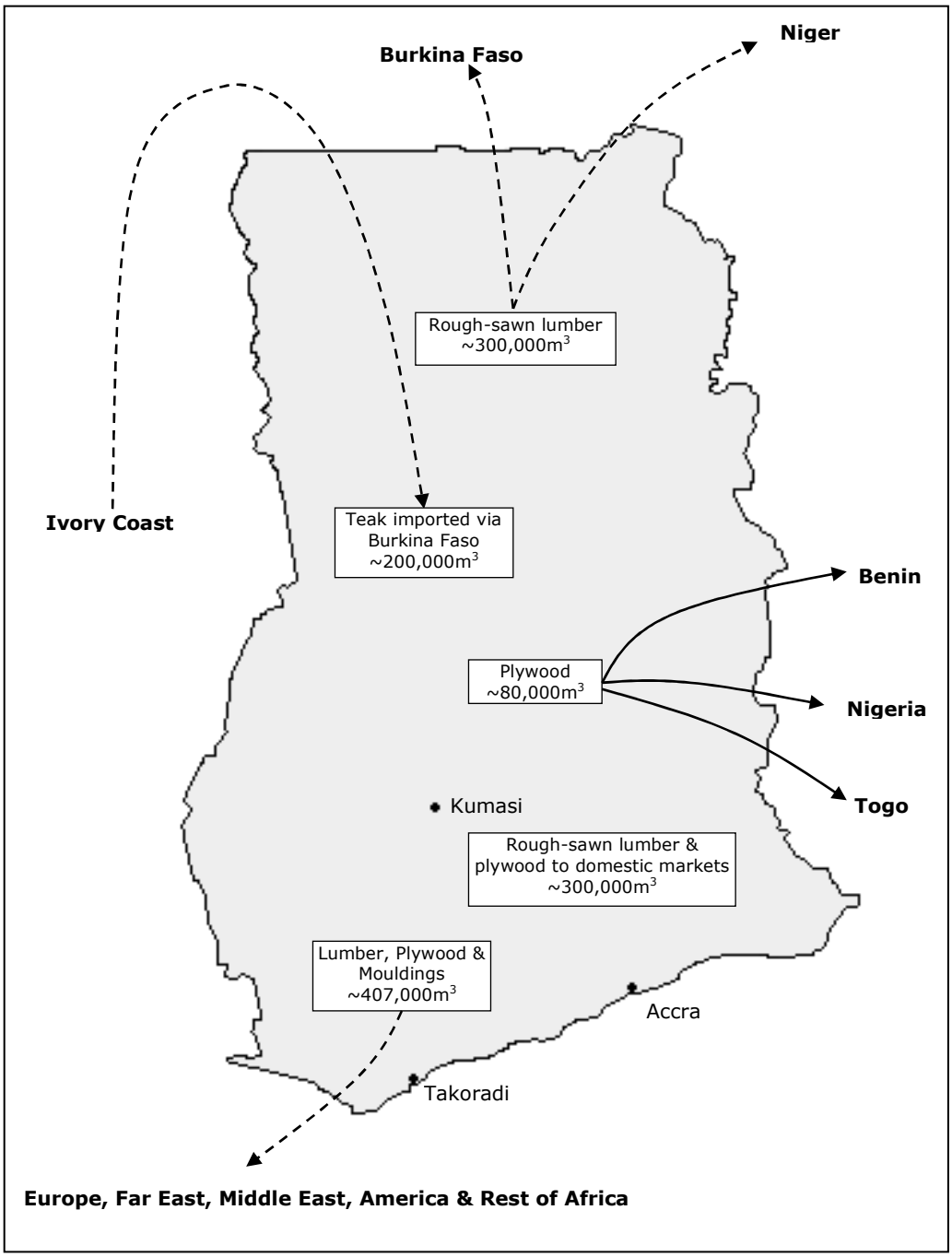


Table 10 Ghana - Timber Exports by Region, Product & Value in € million (2006)

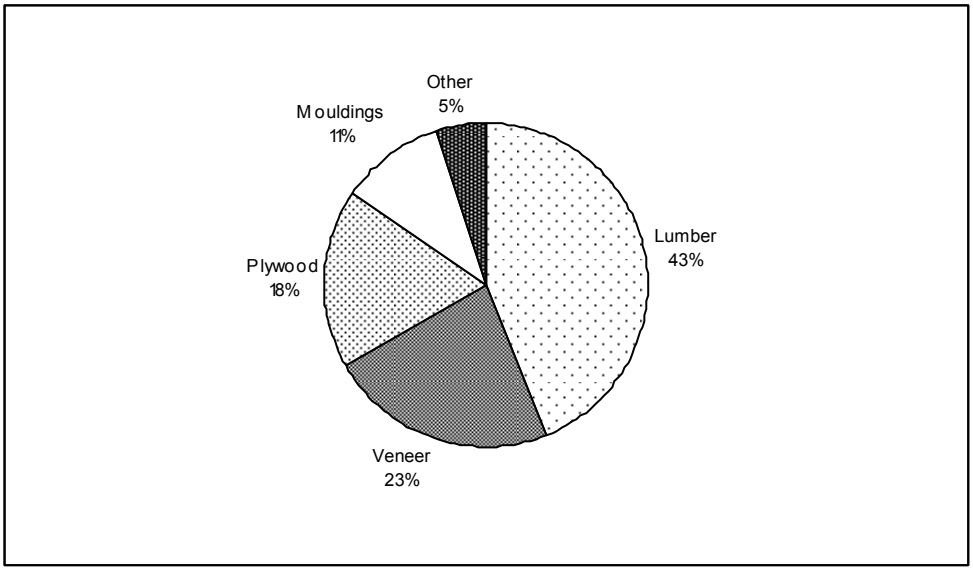
Region	Product						Total
	Lumber	Veneer	Plywood	Mouldings	Boules	Poles	
Europe	29.62	23.04	3.81	17.06	3.53		77.06
Africa (ECOWAS)	3.71	0.02	25.15	0.00		0.04	28.91
America	14.05	9.31	0.60	0.03			23.99
India	13.48	0.51	0.01	0.01	1.75	2.52	18.28
Middle East	7.28	1.66	0.06	0.09	0.01		9.10
Africa (non ECOWAS)	3.20	3.05	0.11	0.08			6.45
Asia/Far East	1.55	0.56	0.01	0.11	0.03	0.52	2.78
China	1.41	0.11		0.61			2.13
Oceania	0.34	0.50	0.53	0.01			1.38
Total	74.64	38.75	30.28	18.00	5.32	3.08	170.06

Source: Forestry Commission, Timber Industry Development Division. 2006.

Lumber is the major export product accounting for 44% of the trade value (see Table 10 & Figure 7). This is followed by veneer (23%) and plywood (18%). Together these three products account for 85% of the total value. Since 1995 the export of logs has been banned.

Value-added products, including mouldings, flooring and furniture components (grouped in Table 10 under Mouldings) constitute only just over 10% of the export trade. This is a small percentage, which indicates that industries have either limited interest or capacity to produce higher value products and probably only do so to increase the recovery from small dimension off-cuts. Apart from issues of securing adequate raw material (see Section 7.3), this does not support the government view that the future of Ghana's timber industry can be secured by developing as a regional processing hub adding value to products manufactured from timber sourced throughout the region. It can be assumed that a great deal of investment would be necessary if there is to be an increase in down-stream processing and to date the private sector does not seem to have made much progress in developing a large scale tertiary processing capacity. It is reasonable to assume that if the idea was practical and profitable action would have been taken in this direction. Unless European, or other buyers, increase demand for tertiary production and Ghana can supply at prices competitive with the more sophisticated industries of South-east Asia it seems probable that the export trade will continue to be based mainly on sawn-timber and plywood.

Figure 7 Ghana - Timber Exports by Category (2006)



Regional Markets

Timber products are supplied from Ghana to neighbouring countries, mainly sawn-timber to the Sahel region and plywood to Nigeria. Much the trade to the Sahel is based on illegal chainsaw logging and export is reported by the Forestry Commission to be conducted with little formality and limited control. Forestry Commission data indicates that sawn-timber exports to the Sahel were about 38,000m^3 in 2007, but local observers suggest that the trade is far greater and that the annual volume is more likely to be in the region of 300,000m^3, which would be in the order of 40 lorry or container loads on average per day and should be reasonably easy to verify.

The officially reported figures for exports to ECOWAS from 2005 to 2007 are shown in Table 11. The growing importance to Nigeria of Ghana as a source of timber products is clearly evident with exports more than tripling from 2005 to 2007.

Table 11 Ghana - Timber Export Volumes & Values to the ECOWAS Region (2005 to 2007)

Country	2005		2006		2007	
	Volume (m^3)	Value (€)	Volume (m^3)	Value (€)	Volume (m^3)	Value (€)
Nigeria	22,460	6,780,000	61,240	19,464,000	74,540	22,553,000
Senegal	22,420	5,389,000	14,760	3,436,000	12,820	3,038,000
Niger	880	84,000	10,340	1,787,000	16,360	2,254,000
Togo	480	164,000	4,570	1,204,000	6,670	1,940,000
Burkina Faso	80	18,000	6,190	1,861,000	8,480	1,501,000
Benin	80	14,000	4,390	856,000	2,500	461,000
Gambia	1,610	408,000	1,250	289,000	700	159,000
Sierra Leone	170	32,000	60	13,000	110	27,000
Mali					240	24,000
Total	48,180	12,889,000	102,800	28,910,000	122,420	31,957,000

Source: Forestry Commission, Timber Industry Development Division. 2007.

Reported trade with Benin, Togo and Nigeria in 2007 amounted to about 84,000m^3 and was almost entirely plywood. It is believed that further volumes of sawn-timber are traded with these countries, but no estimates were available.

The plywood trade with Nigeria was worth €22.4 million compared with European Union imports of about €3.0 million. While the plywood trade with Europe is minimal, there could be a major trade impact if Nigerian interests expanded to include sawn-timber. However, European markets remain attractive to Ghana's producers because suppliers want to maintain access to diverse markets.

Customs figures indicate that there were 290,000m^3 of timber products imported to Ghana in 2005. This consisted of various products and did not include any logs. However, in 2004 and 2005 large volumes of teak were exported although the Forestry Commission asserted that no permits had been issued to cover this. Despite no official record of volumes being either imported or exported, traders confirmed that teak, of which there are only limited quantities in Ghana, is imported from northeast Ivory Coast through Burkina Faso. For 2007 there are records of teak exports and it was Ghana's top exported species with a value of over €29 million and a volume exceeding 127,000m^3. This was almost entirely sawn-timber and poles exported to India. Clearly this is a major cross-border timber flow now of considerable importance to Ghana's exporters and maybe amounting to about 200,000m^3 of logs. Although not having any direct impact on European trade, the discrepancies in official data give a clear indication that the quality of information could be improved.

International

Table 12 and Table 13 provide export statistics for Ghana from 2005 to 2007. Exports to Europe and USA have been declining in both volume and value, but Europe has consistently been the major market. Meanwhile markets in Africa are increasing (see Figure 8), with the most significant destination being Nigeria. Exports to Europe in 2007 accounted for only 30% by volume, but 42% by value and Europe remains the prime destination for higher value products.

Table 12 Ghana - Timber Export Values in € million (2005 to 2007)

Region	2005		2006		2007	
	Value	%	Value	%	Value	%
Europe	102	55	80	47	78	42
Africa	17	9	33	19	39	21
Asia/Far East	29	16	23	14	33	18
America	27	15	24	14	24	13
Middle East	8	4	9	5	8	5
Oceania	1	1	1	1	2	1
Total	184	100	170	100	185	100

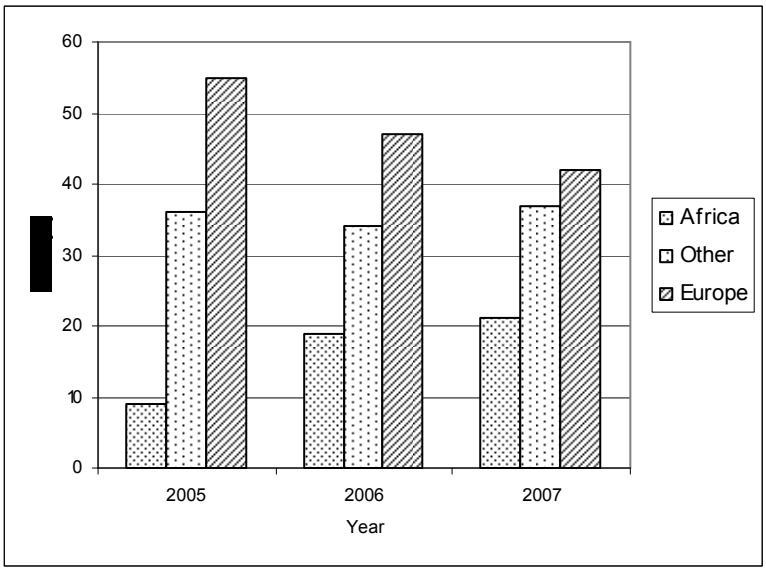
Source: Forestry Commission, Timber Industry Development Division. 2007.

Table 13 Ghana - Timber Export Volumes in m^3 x 1000 (2005 to 2007)

Region	2005		2006		2007	
	Volume	%	Volume	%	Volume	%
Europe	209	45	168	37	160	30
Africa	71	15	116	26	142	27
Asia/Far East	86	19	82	18	139	26
America	69	15	53	12	55	10
Middle East	27	6	29	6	29	5
Oceania	3	1	3	1	3	1
Total	466	100	452	100	529	100

Source: Forestry Commission, Timber Industry Development Division. 2007.

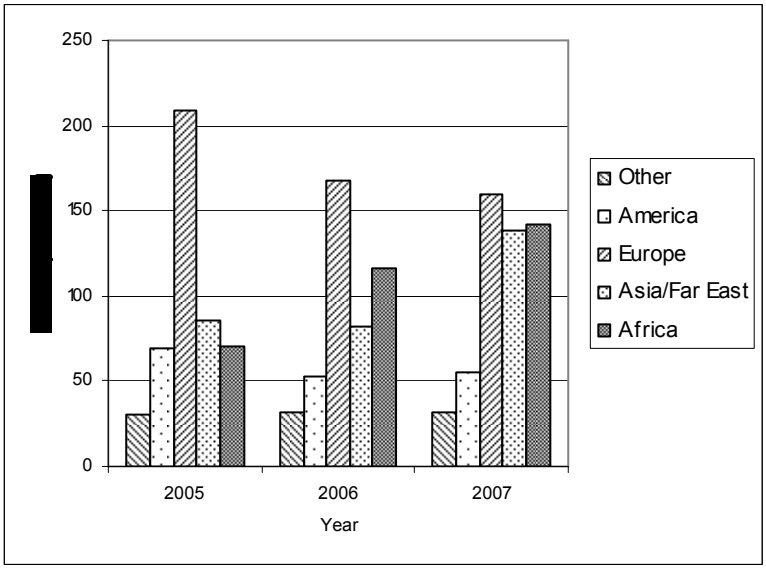
Figure 8 Ghana - Timber Exports by Value (2005 to 2007)



Source: Forestry Commission, Timber Industry Development Division. 2007.

From 2000 to 2006, officially recorded export volumes were fairly stable at about 470,000m^3, but jumped in 2007 to 528,000m^3. Apparently this is because of increased trade in teak originating from Ivory Coast, though a more cynical view expressed was that Ghana is increasing production in anticipation of future reductions if tighter controls are imposed. However, the trend over the last three years has been for decreasing export volumes to Europe and America offset by a substantial jump in export volumes to Africa, Asia and the Far East (see Table 13 & Figure 9). Increased sales to India and China are assumed to be the main reason for the higher export volume.

Figure 9 Ghana - Timber Exports by Volume (2005 to 2007)



Source: Forestry Commission, Timber Industry Development Division. 2007.

7.5 Control of Timber Movement

Responsibility for control of timber movement starts with the Forestry Commission's Forest Services Division (FSD) monitoring domestic transport and Timber Industry Development Division (TIDD), in cooperation with the Customs, Excise and Preventative Service (CEPS), monitoring the export trade. Primary record keeping is entirely paper-based at present.

Forestry Commission

The existing system for tracking log origin commences when log volumes are recorded on a Timber Information Form (TIF) which requires the presence of FSD staff at stump. In practice, loggers have been preparing TIFs for later endorsement by FSD. Based on the TIF, a Log Measurement and Conveyance Certificate (LMCC), which records source and log details, is issued prior to logs leaving the forest.

In transit, the LMCC and logs are checked at TIDD check points, although these have been reduced in number from 27 to 8. At mills, TIDD conducts further log inspections and monitors input/output volumes.

FSD control is allegedly weak and fraught with corruption. TIDD acknowledged that there is internal abuse of the system. Often there are discrepancies between FSD and TIDD data, formerly explained by differences in methods of measurement. Now a unified system of measurement is employed, but still corruption continues to hinder the implementation of controls and so fraud is not commonly detected.

Issue of export permits, which is a further responsibility of TIDD, requires that all timber used in manufacture of export products is covered by a valid LMCC. The TIDD procedures to be observed are:

1. Exporters and buyers must be registered with TIDD, which checks their financial credentials (company registration, tax clearance status, and bank references).
2. Contracts are vetted and approved after verification of prices, specifications and quality.
3. At the mill TIDD inspects the mill's input/output records to verify that only legally documented logs have been processed. Product is graded and inspected and an inspection certificate issued if it is confirmed that contract specifications are met. CEPS will also inspect and seal containers at the time of loading. At this point product can be moved from the mill.
4. After checking Letters of Credit, or other financial instruments and Bank of Ghana Exchange Control Forms, TIDD will issue an Export Permit. For overland exports the Export Permit is issued before goods are moved from the mill.

Customs Excise and Preventative Service (CEPS)

The role of CEPS commences when a request is received from an exporter. In cooperation with TIDD, product will be inspected at the mill, fumigation conducted and the container sealed. Containers may also be loaded at port, where the same procedure will be followed.

For maritime export a Customs Export Declaration must be completed and provided to CEPS, along with the Export Permit, packing list and bank currency exchange forms. CEPS will examine the consignment, endorse a Goods Movement Certificate permitting Ghana Ports and Harbours Authority to receive the consignment and transfer to the appropriate stevedoring agent for loading.

Non-containerized lorry loads for overland export require the same documentary procedures to be followed and CEPS will check at frontier posts that goods match packing lists and that all documents are in order.

Timber Tracking

At present all timber tracking is based on paper records and does not provide traceability back to stump. Ghana is considering the possibility of adopting electronic tracking procedures.

SGS were engaged to develop an LAS, but to date the development is only conceptual and recommendations made by SGS are still under consideration. Funds were provided by the Netherlands to support the process, but further funding will only be made available if the Government of Ghana also provides funding and is seen to demonstrate adequate commitment.

7.6 Strengths & Weaknesses

Strengths

Ghana's strengths are that it recognizes the importance of the very substantial European market and the need for action that will address the problems of the forestry sector. To this end it has embarked on the process of VPA negotiation. Wide participation in the negotiating process has been accepted and discussions include not only government but a wide range of representatives of the NGO sector and the timber industry.

The well developed NGO sector is very active in pushing for reform and is providing sophisticated input to the debate on forestry and the environment. It is also involved in a number of projects that are testing the feasibility of alternative approaches or improvements in forest management. These include community based initiatives and support for certification.

Within the timber industry there have been a number of closures, which have probably removed the weaker and less well managed companies from the equation. Those that survive may have an interest in a long term future based on sustainable forest management. A number of companies have now committed to achieving sustainable management certification and are participating in the VPA negotiations, demonstrating at least awareness and growing understanding of the issues.

The quality of statistics covering official export trade is reasonably good and without a great deal of effort could probably be much improved.

Weaknesses

Enforcement of forestry regulations is inadequate as evidenced by the proliferation of chainsaw logging. Rumours of powerful, high-level involvement and the Forestry Commission practice of giving quasi-legal status to illegal activities by issuing transport permits suggest that achieving effective enforcement will be a challenge. The integrity of the forest resource is being seriously undermined as a result and reforms may be too slow in coming to reverse current negative trends.

Movement of timber, including export, is inadequately controlled by both the Forestry Commission and CEPS and again this is an issue arising from poor enforcement and corruption. Along with this there is no effective means to trace logs back to stump and the authorities are making extremely slow progress in rectifying this situation.

The Government of Ghana's solution to deal with industrial over capacity is not by downsizing, but instead, by increasing import of logs. The likelihood is that there will be only limited external supply available and the continuing demand for logs will maintain the drive to over exploit local resources.

There are no reliable statistics on unofficial trade, covering either the domestic market or overland trade with neighbouring countries.

8. Guinea Conakry Country Report

8.1 Introduction

The forest resources were heavily depleted when the Ministry of Forestry opened the market in 1999 to external operators. Political instability and unrest have not favoured legally registered companies and, where there are significant forest resources, have facilitated illegal activity. Power-cuts are frequent and have led to the concentration of log-yards, sawmills and small furniture processors in Conakry.

8.2 The Forest Resource & Utilization

Guinea Conakry has four very diverse regions: the 'Guinée Maritime' with the largest mangrove forests in West Africa; the 'Moyenne Guinée' close to Gambia and Senegal; the 'Haute-Guinée' with savannah and open forest; and the 'Guinée Forestière' which is dense forest around Mount Nimba (see Annex 14 - Administrative Map of Guinea Conakry).

The forest extends to about 6.7 million hectares, but the timber potential is unevenly distributed. Some less populated zones like the 'Guinée Maritime', excluding Conakry, have capacity for charcoal production and the 'Moyenne and Haute Guinée', where pasture is dominant, still have some timber species (afzelia, iroko, lingue, mahogany and false-teak). In 'Guinée Forestière' the former forest cover of 1 million hectares has been dramatically reduced to about 312,000 hectares because of several concomitant factors: settlement of refugees from Sierra Leone, Liberia and Ivory Coast in densely forested areas; over-logging; and slash-and-burn agriculture. There are some scattered plantations of teak and local species.

In 'Guinée Forestière' there are 6 protected forests (Forêts Classées) Ziama, Diécké, Mont Béro, Pic de Fon, Yonon and Banan covering 260,000 hectares of former logging reserves.

Timber statistics are very poor due to the limited capacity of the forest administration and the absence of coordination and interest between forestry, customs and port administrations. There are no computerized records, timber database or records of informal trade.

8.3 Forest Industries

With Guinea Conakry having substantial reserves of tin, iron, diamond, platinum and gold, mining is important to the economy. Timber resources have not previously been intensively exploited, and timber industries are a recent development. There are no long-term operators. Many operators are mining companies, which before exploitation of mineral resources, opportunistically log the forest and export the logs without any processing. They are not licensed for timber production but are authorized to excavate below ground level!

Since 1999 many logging permits have been issued, mostly to foreign logging companies (Thanry, SMG and Valoris) but these were cancelled or not renewed after 2002.

Joseph Bitter is the only company legally extracting and exporting teak logs. Chinese buyers operate informally by sub-contracting locals operating legally with chainsaw permits, or illegally, to harvest timber species such as mahogany and false-teak in the 'Moyenne' and 'Haute Guinée'.

Valoris developed an unauthorized road network to log in the Mount Nimba Man and the Biosphere Reserve. This has facilitated penetration of slash-and-burn farmers and degradation of this important chimpanzee habitat.

Foret Forte is the only timber industry in Guinea Conakry with two sites, one near Conakry, SODEFA, specialized in construction materials and furniture, and the other, the Foret Forte mill in Nzérékoré, which undertakes timber harvesting and processing to produce veneer, plywood, sawn-timber, flooring and mouldings. Operations are in former logging concessions. Principal species harvested are ako, dabema, framiré, fromager and samba. The company was created in 2002 with new machinery imported from Japan and China.

Frequent press reports allege that Foret Forte is involved in fraudulent timber export and staff employment and operates in collusion with government officials and the *Agence Française de Développement*. It was apparent from visiting the two operating sites and from information freely provided at meetings with management staff, and verifiable against other data sources, that a lot of the accusations are unfounded and inconsistent. Most of the 1,300 employees are local and are legally employed in good working conditions. There are only a few expatriates (European, Chinese, Indonesian and Ivorian). The company was already complying with almost 80% of the FSC standards at the last audit.

The annual processing capacity of Forest Forte is 46,000m^3. Taxes are paid to the local administration of villages adjacent to the harvest areas and the company is involved in improvement or development of schools, roads, bridges and clinics. High recovery is achieved through manufacture of different products and grades with final waste being used to fuel driers. Forest Forte is hoping to receive authorization to harvest for 25 years within the protected forests of Dièckè and Ziama, and plans to harvest 25,500m^3 annually from Dièckè and 18,000 m^3 from Ziama, which is about four to five trees per hectare with a mean volume of 30m^3/ha. The *Centre Forestier de Nzérékoré* (CFZ), assisted by the German development bank, KfW, is preparing management plans, but the plans have not yet been approved.

8.4 Timber Trade

Reported timber flows in Guinea Conakry, with volumes where known, are shown in Map 4.

Timber is mainly exported illegally, either by maritime or overland routes and this informal trade may represent 80 to 90% of the trade.

Local

Permits are issued against quotas for chainsaw logging by each prefecture from the local forest administration and chainsaw loggers are operating in all the forest areas, including the concessions attributed to Foret Forte. Local communities are also conducting illegal chainsaw logging operations on the fringes of logging concessions where there is still considerable timber potential.

Thirteen illegal roads were opened for transporting logs to Taboua in Ivory Coast, but now over-logging from 1999 to 2003 by operators from Ivory Coast has been stopped or much reduced.

Timber is produced by chainsaw gangs supported by Chinese buyers in 'Moyenne' and 'Haute Guinée' in the vicinity of Mamou, Faranah and Kankan (see Annex 14 - Administrative Map of Guinea Conakry).

Regional

There is considerable trade to Senegal, Mauritania and Mali in sawn-timber and plywood produced from indigenous species of lingue, mahogany and samba. The informal furniture industry based in Conakry, and many unofficial timber traders, are supplying both local markets and neighbouring countries. Firewood and charcoal are also exported from Guinea Conakry to other countries in the region.

International

Only 8,740 tonnes were exported to Europe in 2007 the bulk of which was sawn-timber (see Section 3.3, Table 5, Table 6 and Annex 7 - Guinea Conakry Exports to the European Union). Data from SDV-Delmas, a freight forwarding company, indicates the export of 2,963 containers of timber in 2006, but only 392 by the two legally authorized companies, Foret Forte (279) and Joseph Bitter (113). Another 59 exporters are mining companies or Indian and Chinese buyers. There is limited processing by these opportunist loggers and buyers, and most of the export trade is in logs to India and China. SDV-Delmas has recently sacked three staff involved in fraudulent shipping of timber.

The Foret Forte mill is harvesting logs from community forest areas and is processing and exporting sawn-timber, mouldings, veneer and plywood to the Sahel countries, either overland or by sea. Senegal, Mali, Burkina Faso and Mauritania are growing markets for sawn-timber and plywood. Processed timber is also exported to the Northern African countries of Morocco, Tunisia and Libya and to Spain, Portugal and France.

8.5 Control of Timber Movement

Although chainsaw permits are issued by prefecture and county, the forestry administration exercises no control of harvesting by villagers, with or without chainsaw permits, and logging occurs either in former logging concessions or on the periphery of protected forests.

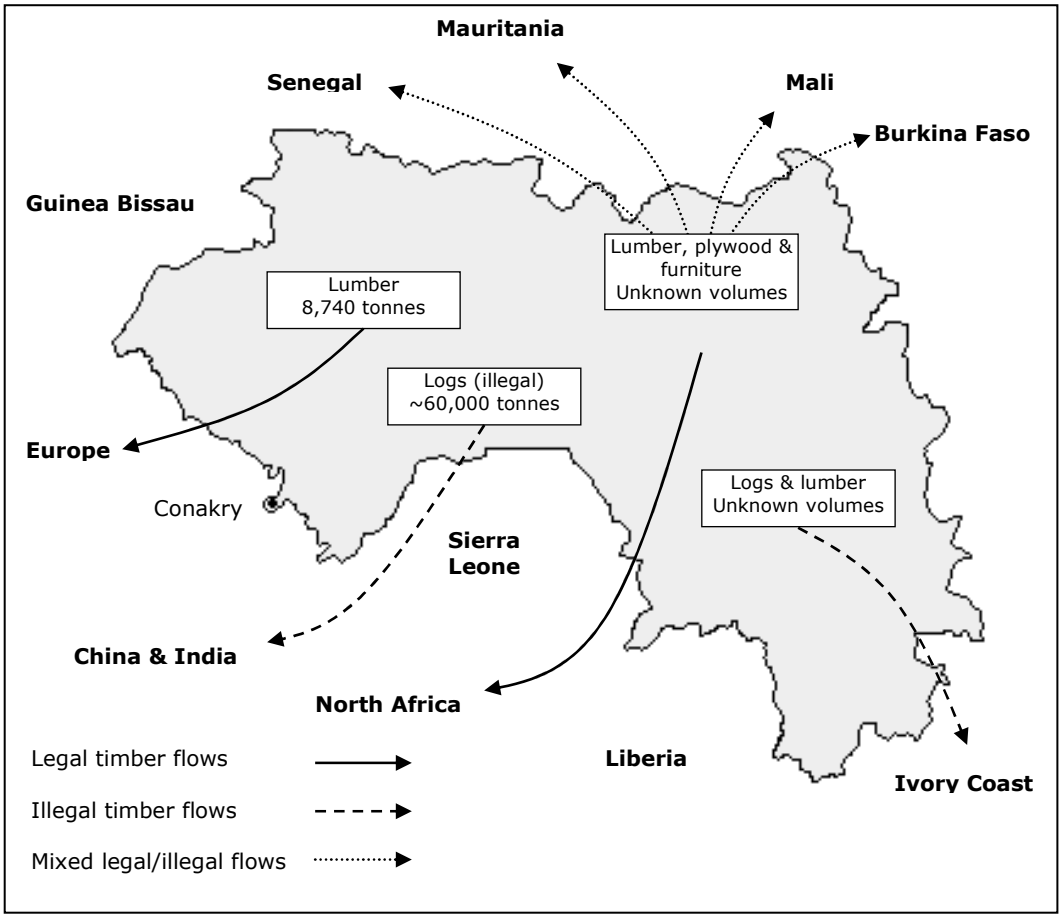
The naïve approach of the forest administration to open-up forest resources to potential industries without appropriate forest legislation, and the lack of control and enforcement at local level, led to the ban of most of the allocated forest permits in 2002. The timber resources of the 'Guinée Forestière' were looted in the four years from 1999 to 2002. Of the two remaining legal operators, Foret Forte, now has limited resources available for its mill. The increasing number of wood buyers exporting containers of logs, either teak or other species, led to a ban of all timber exports in early 2008 and the confiscation of 2,000 containers.

Foret Forte pays a number of taxes for harvesting. An area charge of 8,000 Guinean Francs/hectare is applicable over 167,000 hectares, and in addition it pays stumpage fees, reforestation fees and export taxes. Villages and prefectures receive 45 % of the taxes and 55% goes to national forest funds.

In an attempt by the Ministry of Forestry to decentralize, CFZ was restructured as a mixed public and private sector organization with *Etablissement Public de Caractère Industriel et Commercial* (EPIC)

having responsibility to manage and collect taxes from the four protected reserves, in particular those of Ziama and Diecké. However, the new structure of EPIC was never fully operational despite six years of continuous funding and technical support from KfW and the *Project de Gestion des Ressources Forestières* (PGRF). The management plans for the protected forests were revised several times delaying their implementation by Foret Forte.

Map 4 Guinea Conakry - Timber Flows (2007)



Customs procedures

Customs are implementing a new computerized system, SYDONIA, to support checking operations with EC funding support and assistance. As with most of the West African ports, the introduction of new security measures under the International Maritime Organization's International Ship and Port Facility Security Code (the ISPS Code) is slow and informal trade activities continue to be favoured.

Export documents required are the conformity certificate describing timber species, origin and product type, an export statement issued by the Ministry of Forests, the custom statement describing the exported timber, the bill of consignment and letter of credit securing the local bank payment, and loading statement after final clearance by customs.

There is a continuous flow of plywood and unprocessed timber to the Sahel countries of Mali and Burkina Faso. Consignments are required to have legal transport documents to cross the border, or alternatively bribes are paid at the border post.

Timber-tracking

Operating in the well-defined forested zone of 'Guinée Forestière', Foret Forte is the only legal harvesting and processing company and is working to achieve FSC certification. It will be straightforward to involve the company in the FLEGT process as it maintains COC from the forest to its processing mill. For other harvesting operations, scattered in the three other geographical regions in the savannah, other rich forest areas or small plantations, timber tracking will be much more difficult. Up to now no timber tracking systems are operational in Guinea Conakry.

8.6 Strengths & Weaknesses

FLEGT level of interests, capacities and commitment

The level of understanding of FLEGT among different organizations, public and private, is poor. The forest administration needs information and its capacity needs reinforcement, as does that of the timber association, *Office Guinéen des Industries du Bois* (OGUIB). Local NGOs are very weak and rarely survive for more than one year after founding. Only '*Guinée Écologie*' seems to have any capacity as a result of its association with international NGOs such as Flora & Fauna International.

High turn-over of staff is a key difficulty and the forestry administration has limited commitment and low capacity to efficiently control timber harvesting, transport and trade.

Problems

Political instability (demonstrations in 2007 for four months from February to June, ban of wood exports in February 2008 and retention of 2000 containers), poor power supply for the whole country, frequent power-cuts in Conakry, and lack of road maintenance are all obstacles to development of the forestry sector.

Refugees have largely destroyed the forest area of Guékédou near Nzérékoré (see Photo 1 - The Guékédou Window, Guinea Conakry, Section 2.9). Other problems are: lack of land tenure reform; the unprofessional attitude of many in the timber business, particularly Chinese and Indians seeking quick profits; uncontrolled extension of slash-and-burn agriculture for coffee and cocoa plantations; and lack of collaboration between donors or international development programmes.

9. Ivory Coast Country Report

9.1 Introduction

The well-maintained road network and the good energy supplies are facilitating log extraction and transportation to local timber processing industries, or export products to the maritime ports and frontier crossings. The partition of the country is still physically maintained by the forestry, police, army and customs administration and there are multiple unnecessary check points every 10 to 20 km on primary and secondary roads.

Some organizations were unwilling to be consulted, notably the *Direction de la Production et des Industries Forestières* (DPIF) and customs, both institutions deeply implicated in many reported cases of chronic invasive corruption.

9.2 The Forest Resource & Utilization

Ivory Coast has still 10.4 million hectares of forest according to FAO (see Section 2.1, Table 1) and this has increased by 1.8% between 1990 and 2005. According to the *Direction de l'Informatique, des Statistiques et des Archives* (DISA), forest areas amount to 14 million hectares, four million hectares of protected forest and 168,000 hectares of plantations, mostly teak (see Annex 15 - Administrative Map of Ivory Coast). Protected forests have been heavily depleted by conversion to coffee and cacao plantations by illegal settlers from Burkina Faso and other neighbouring countries. Also affected were 2 million hectares of conservation areas, national park and nature reserves.

The *Société de Développement des Forêts* (SODEFOR) has been responsible since 1992 for the management of the 220 protected forests covering over four million hectares. The *Ministère de l'Environnement, des Eaux et Forêts* (MINEEF) and the DPIF are responsible for 380 *Perimètre d'Exploitation Forestière* (PEF), which are reserves, of at least 25,000 hectares, covering 14 million hectares.

In 2006 the total formally extracted log volume, according to DISA, amounted to about 1.5 million m^3 with 1.3 million m^3 from forested areas, 120,000m^3 from protected forests and 100,000m^3 from teak plantations. The average volume harvested has been decreasing since 2004 in forest areas and teak plantations and increasing in protected forests. Informal timber extracted without payment of stumpage fees may account for 20% of the total production. Timber illegally harvested from the periphery of PEF and protected forests, either logs or sawn-timber, by chainsaw gangs to meet local and regional demand, may equal the formal volume extracted. There is also timber from Guinea Conakry and Liberia entering the processing units in Guiglo and San Pedro, but estimates of volume are unavailable.

It was reported that from 1999 to 2003 large volumes of logs moved from Guinea Conakry to Ivory Coast and 13 logging roads were newly opened for transport of these logs. Due to shortage of logs and tightened controls by the Government of Guinea Conakry this flow of timber sharply decreased in 2003.

There is no effective coordination of statistics between different administrations (DISA, DPIF, SODEFOR, customs and port authorities), and informal trade is not recorded.

From 2004 to 2006, the number of timber species utilized was 21 for redwoods with a production volume of 500,000m^3, 17 for whitewoods (850,000m^3) and 55 of various other species (71,000m^3). The volume of redwoods extracted is decreasing.

Production of the seven main timber species (acajou, fraké, framiré, fromager, iroko, samba and teak) represented more than 70% of the total volume from 2004 to 2006 with an average of about 1.08 million m^3. An additional 13 species (ako, anegre, azobe, badi, bahia, dabema, ilomba, kapokier, koto, lingue, niangon, sipo and tiama) account for 24% of the mean annual volume with the remaining 60 species harvested accounting for only 2% (see Table 14).

9.3 Forest Industries

A large timber processing industry developed in Ivory Coast because of the extensive forest resources and good road infrastructure and energy supplies. Most companies have either logging concessions or manage protected forest under the SODEFOR management plan. The Main companies, CIB, FIP, Inprobois, SIFCI, SMCI, STBO, Thanry and Tropical Bois, account for 80% of log harvesting and timber processing (Racewood, 2006, *Syndicat des Producteurs Industriels du Bois* (SPIB) data & DISA).

All the industries have sawmills, 30% produce rotary veneer and 10% produce sliced veneer. The last two activities have increased during the last two years from 22 to 30% and 8 to 10% respectively (DISA). In 2006, primary processing (sawn-timber, rotary-cut veneer and sliced veneer) accounted for 700,000m^3 of output and secondary processing (plywood, mouldings, flooring and builders' joinery)

accounted for 132,000m^3. Production of sawn-timber is decreasing while rotary cut veneer is increasing. Secondary processing is now sharply increasing. (see Table 15 & Annex 16 - Ivory Coast Production (2004 to 2006)).

Table 14 Ivory Coast - Main Timber Species Processed (2004 to 2006)

Species	Volume (m^3)			Mean Volume	
	2004	2005	2006	(m^3)	(%)
Fromager	363,325	441,634	418,487	407,815	26.9
Samba	224,068	263,536	213,885	233,830	15.4
Iroko	197,378	187,393	136,549	173,373	11.5
Teak	141,368	158,350	99,228	132,982	8.8
Frake	74,995	75,051	76,261	75,436	5.0
Acajou	63,341	65,554	76,455	68,450	4.5
Framire	68,227	66,640	51,449	62,126	4.1
Total	1,132,702	1,258,158	1,072,314	1,154,012	76.2

Source: DISA & SYDAM

Table 15 Ivory Coast - Timber Production in m^3 (2004 to 2006)

Timber Product	2004	2005	2006
Total log input	**1,692,632**	**1,553,535**	**1,467,915**
Sawn-timber	522,628	473,263	442,251
Rotary veneer	223,944	268,121	250,635
Sliced veneer	32,508	11,101	11,031
Total primary processing	**779,080**	**752,485**	**703,918**
Plywood	64,938	47,106	87,706
Joinery			12,561
Flooring	12,302	5,935	12,354
Moulding	9,997	6,752	11,170
Others	12,246	9,366	9,154
Total secondary processing	**99,483**	**69,159**	**132,945**

Source DISA, SYDAM

Most companies are being consolidated into bigger industrial groups (e.g. SIFCI-CIB). Lebanese are now predominant in management of the industry, followed by French, Italian and Spanish. Indian and Chinese nationals are increasingly active in the raw material trade, especially of teak to India and false-teak to China.

Some operators have attempted to move to forest rich neighbouring countries such as Liberia and Guinea Conakry, but without success. Of 140 registered companies, half are not working because of timber scarcity. An estimated 70 newly established companies operate informally and illegally in harvesting, transport and even export.

Recovery rates range from 30 to 40% for sawn-timber to 50 to 60% for rotary veneer depending on the processing method. The Informal sector is often closely associated with the formal one and recycles waste for local demand (planks, charcoal and firewood).

The market trend is to reduce waste and increase high value processing in order to maintain the export trade despite the scarcity of timber resources.

9.4 Timber Trade

Reported timber flows in Ivory Coast, with volumes where known, are shown in Map 5.

Local

Internal wood derives from chainsaw logging in teak plantations, protected forests and conservation forests (Tai National Park). The local market is supplied with rough-sawn planks, with whitewood used for construction and redwoods for the furniture industry.

Regional & International

Circulating in the ECOWAS countries are logs and sapele and samba sawn-timber, for construction, and plywood.

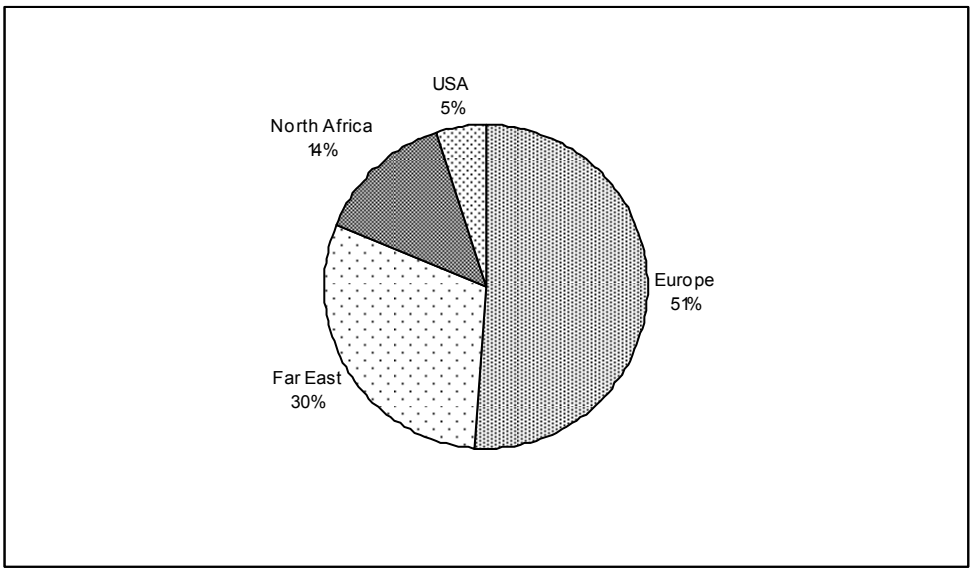
Timber flows from Ghana, Guinea Conakry and Liberia into Ivory Coast, and from Ivory Coast to the Sahel countries, either as logs or sawn-timber of indigenous species, but much of this trade is informal or illegal. Containerized teak from Bouaké and Abengourou has transited through Burkina Faso during the partition of north and south for onward export through Tema in Ghana or Lomé in Togo. Now it appears that increasing volumes of teak from Ivory Coast are being processed in Ghana (see Section 7.4).

From 2.4 to 2.6 million m^3 of logs are transformed to produce 950,000m^3 of primary products and 250,000m^3 of secondary and tertiary products, which are exported. Exports to Europe (see Section 3.3 Table 5, Table 6 & Annex 8 - Ivory Coast Exports to the European Union) include sawn-timber (62%) and veneer (22.5%).

Official exports to Italy, Spain, Germany, France, UK, Ireland and Portugal account for 67% by value and 51% by volume, which was reported to be 355,832m^3 in 2007, compared to EU recorded imports of 255,000 tonnes. Exports, to Mauritania, Tunisia, Burkina Faso, Mali and Senegal, account for 13.5% by value and 15% by volume, mainly plywood and air-dried sawn-timber. Overland exports do not take into account trade by the informal sector of minimally processed timber to other ECOWAS countries. The emerging markets of India, Malaysia, China, Taiwan and Thailand account for a high volume (30%) and a low value (15%). India is the leading destination for teak poles and sawn-timber with minimal processing. China, the leading buyer of false-teak, buys mostly squared logs or sliced veneer. The volume and value of trade to USA is 5%. (see Section 3.4 Figure 4, Figure 10 & Annex 16 - Ivory Coast Production (2004 to 2006)).

Annual exports to all destinations, through Abidjan Port are over 525,000m^3 of primary and secondary processed kiln-dried sawn-timber, rotary veneer, sliced veneer, mouldings, flooring and plywood. Through San Pedro Port, annual exports are about 245,000m^3 and are comprised of teak logs, green rough-sawn lumber, and almost no processed timber.

Figure 10 Ivory Coast - Official Timber Exports by Region & Volume (2006)



9.5 Control of Timber Movement

There is limited law enforcement, but there are many checkpoints operated by customs, forestry officials and police for the purpose of collecting bribes, rather than checking documents or loads. Timber processing industries allocate an average of 150,000 CFA Francs per lorry for payment of bribes between PEF and processing mills.

A visit to the Haut Sassandra protected forest near Vavoua, managed by COVALMA and SODEFOR, demonstrated reduced logging, support to the villages and reforestation using fast-growing commercial species (see Annex 17 - Management Plan of Haut Sassandra). Existing management plans for most of protected forests or PEF are not fully implemented. There is no traceability for timber extracted.

Customs procedures

The principal documents required for timber export are the Specific Statement (timber species, quantity and type of processed products) provided by the Direction Générale des Eaux et Forêts and the Certificate of Origin. The export procedures are the same for continental or maritime wood products.

Additional documents required are the commercial bill and the charge commitment if the value is above 5 million FCFA. Since 2007, the commercial bill has required payment of a new tax representing over 10% of the total export value. Later this tax is meant to be reimbursed to the exporting company, but in practice the process is not completed and reimbursement is repeatedly delayed by the Ministry of Budget. It is perceived as a supplementary tax on timber exporters which are pushing for its cancellation or full reimbursement, as all timber is exported free of tax in other West African countries and Ivorian timber exporters seek the same conditions.

A detailed Customs Statement is completed by the consignment company before customs will issue a loading statement permitting export.

Timber-tracking

Most timber companies are sourcing timber from illegal or undocumented sources and there is no effective timber tracking in operation to prevent this, although trials are being conducted by three companies, Inprobois, NSA and NSBF. Inprobois is the only company attempting to gain certification.

9.6 Strengths & Weaknesses

FLEGT level of interests, capacity & commitment

Only the forest administration has any level of information on FLEGT. Among professionals there is still confusion between FLEGT and FSC. Interested professionals from SPIB need more information and some financial support to join the FLEGT initiative. A new professional timber trade association in San Pedro is interested in good practices within the industry.

NGOs are weak and most of the international NGOs (WWF, International Union for Conservation of Nature (IUCN), Conservation International, Birdlife, etc.) left during conflict. Only *Afrique Nature International*, a francophone NGO, has prepared strong proposals and its capacity needs to be reinforced.

Inprobois are the only company in the process of obtaining certification, but others show an interest in FLEGT if they can be financially supported. SGS is currently involved in piloting wood tracking with three companies (Inprobois, NSA and NSBF) with funding from ITTO. A working group from SODEFOR, funded by *Organisation Africaine du Bois* (OAB) & ITTO has developed principles, criteria and indicators for sustainable management of protected forests in Ivory Coast.

Forest permits are allocated to individuals, but not by transparent bidding processes as required under the forest policy, and protected forests are sometimes allocated to non-professionals who then sell on harvesting rights. Criticisms were made by some professionals that bidding processes for permits to log protected forests can lead to the selection of the best offer, which is not necessarily the best choice in terms of forest management and timber utilization. Greater degradation may result than under previous professionally operated companies. There is a need to regulate involvement in the timber business to control the activities of those who are interested in quick financial returns rather than developing timber processing industries and the national economy.

Obstacles to FLEGT implementation are the large turnover of administrative staff and administrative conflicts. There is a need to reinforce the administrative capacity.

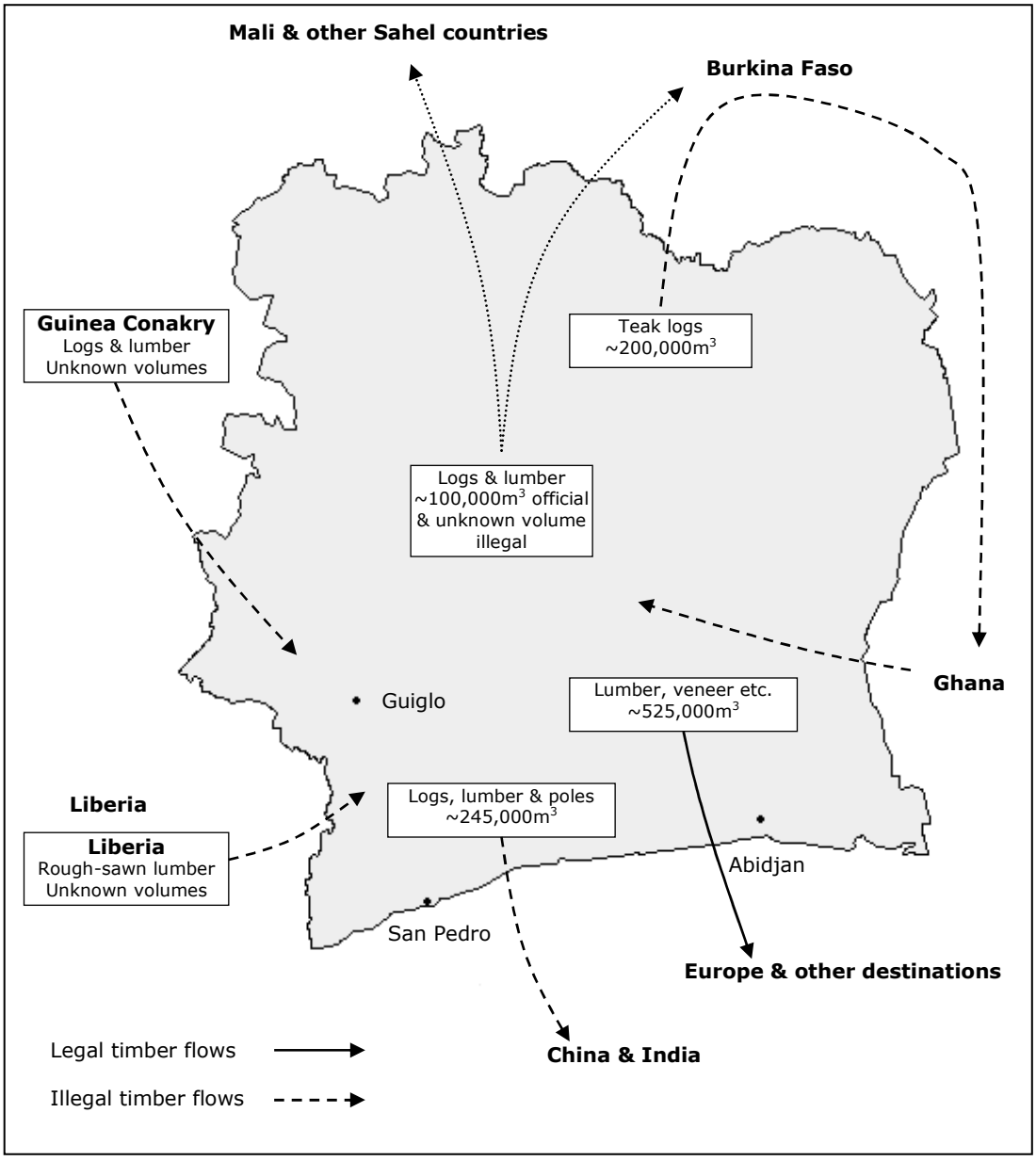
Problems

No Land tenure reform has been completed, particularly for the significant number of immigrants from Sahel countries. Uncontrolled extension of slash-and-burn agriculture for coffee and cocoa plantations and to meet the booming demand for firewood and charcoal is destroying large areas of forest.

Needs

Suggestions were made by SODEFOR and an NGO to develop the capability for evaluation of the remaining regional timber resource (species, volumes and forest areas) using remote-sensing techniques and to increase the reforestation rate inside protected forests using indigenous commercial species and other fast-growing species such as teak to develop plantations.

Map 5 Ivory Coast - Timber Flows (2007)



10. Liberia Country Report

10.1 Introduction

The principal forestry activity in Liberia has always been logging with minimal development of timber processing industries. Exports were negligible during the mid-1990s, but began to expand sharply towards the end of the decade and in 2000 the forestry sector contributed about $100 million to the total gross domestic product of $450 million (Greenpeace, 2002). Although accurate data is lacking it was assumed that timber export revenues for 2002 were at least $146 million, and possibly as much as $180 to 200 million (United Nations Security Council, 2003).

In 2003, in response to protracted civil wars between 1989 and 1996 and again from 1999 to 2003, the UN imposed a timber export ban because of the lack of any effective forest authority and in an effort to curtail financing of illegal arms trafficking linked to continuing instability in Liberia and in neighbouring Ivory Coast and Sierra Leone. The ban was repealed in 2006 when Liberia was judged to have met UN conditions requiring forest sector reform.

The Forest Development Authority (FDA) is charged with management of Liberia's forests, in both forest reserves and off-reserve. No timber trade statistics were available from the FDA or elsewhere in Liberia.

10.2 The Forest Resource & Utilization

According to FDA (2007) there are 2.4 million hectares of closed dense forest and a further 1.0 million hectares of open dense forest, which in total amounts to about 36% of the land area. FAO (2006) records a loss of forest area from 1990 to 2005 of 22.3% (see Section 2.1, Table 1).

There has been no comprehensive forest inventory since the 1960s when extractable commercial timber volume was estimated to be 3.2 million m^3 per annum (FAO 2004). Now the general view is that logging activities both before and during the conflicts have caused serious degradation and it is generally believed that the sustainable annual harvest should not be more than 800,000m^3.

Formerly logging was based on allocation of concessions to logging companies mainly through patronage and cronyism, and in 2004 there were 72 companies claiming the rights to concessions extending to over 5.5 million hectares many of them apparently overlapping as claims were two and a half times the area of actual forest (Rochow *et al*, 2007). To resolve the chaos, all companies were examined in 2004 by a concession review committee. It was revealed that no company could meet simple legal criteria demonstrating the legal right to log (Woods *et al*, 2008). In line with recommendations by the committee, the President, in 2006, declared all concession agreements to be null and void.

Reforms now being implemented are that Timber Sales Contracts (TSCs) or Forest Management Contracts (FMCs) will be awarded by competitive tender. TSCs will cover small areas of about 5,000 hectares in off-reserve areas, which are destined for conversion to agriculture, have tenure of three years and will be awarded to companies having at least 51% Liberian ownership. FMCs will cover areas from 50,000 to 400,000 hectares, which are intended for long-term sustainable management. Tenure will be 25 years and, if the area is greater than 100,000 hectares, may be awarded to foreign companies.

Photo 3 - Chainsaw Lumber, Liberia

Near Toetown

Six TSCs have been awarded and successful bidders are expected to complete pre-harvest formalities, including preparation of environmental impact assessments and annual operating plans, and

establishment of COC procedures. Award of three FMCs is now being finalized and logging is expected to commence in both TSCs and FMCs in the near future. There is concern that the FDA does not yet have the capacity to regulate and that processes are being expedited because of the political pressure on the FDA to increase revenue from the sector. The FDA is effectively becoming a stakeholder charged with maximizing revenue rather than a facilitator of sustainable forest management.

While concessions have been moribund, chainsaw logging has expanded rapidly. Illegally felled trees are being converted wastefully in-situ to planks, and, in common with much of the rest of the region, the FDA is collecting fees for issue of official waybills and thus giving the business quasi-legal status.

There is abundant evidence, in the form of produce being sold at roadside, of widespread charcoal manufacture, which is a further uncontrolled exploitation of forest resources.

10.3 Forest Industries

Liberia's timber processing capacity is unknown and not well developed. A plywood mill was operated by the Oriental Timber Corporation (OTC), owned in part by the Dutch national, Gus Kouwenhoven, who was a close associate of Charles Taylor, the former president. The factory was looted and destroyed in 2004, after the war. Indonesian investors - the forestry conglomerate, Djajanti - were also involved. OTC had a notorious reputation and was implicated in arms trafficking.

Now there are no major timber processing operations and, at least initially, activity will be focused on logging and log export. However, within the region there is considerable interest in Liberia's forest resources, either to obtain the logs needed to keep industries going in other countries, such as Ghana, where local resources are dwindling, or to relocate and invest in Liberia.

Photo 4 - Charcoal for Sale, Liberia

Zwedru to Monrovia roadside

10.4 Timber Trade

From 1996 to 1999 average log production was about 150,000m^3, but increased sharply in 2000, when production and export volumes were about 896,000 and 626,000m^3 respectively. In 1995 almost 100% of exports were to France, but by 2000 China had entered the market and accounted for about 50% of the trade, with Europe consuming about 40%, of which 17% was to France. By 2003 China was buying more than 60% of all exports and, with French exports dropping to less than 20%, was by far the most significant trade partner.

Until the timber export ban in 2003, Liberian exports to Europe were second only to the Ivory Coast in volume, but, given that there was very limited added value processing, only third in value. In 2000 and 2001 the export trade to Europe was valued at just over €70 million (see Section 3.3, Table 5, Table 6 and Annex 9 - Liberia Exports to the European Union).

The domestic market consumes large volumes of low-grade, rough-sawn lumber derived from chainsaw logging operations, but no figures were available. It is believed that timber supplied to Monrovia could exceed 100,000m^3. Additionally, large volumes of charcoal are being transported to Monrovia.

Regionally it is thought that timber is being supplied to industries located at San Pedro and Guiglo in Ivory Coast, and at Guékédou in Guinea Conakry. This trade is illegal and customs officials denied that any timber crossed the frontier at Toetown en-route to Guiglo. However, timber transporters advised that the trade does occur and alleged that it is facilitated by the issue of export documents by the FDA and collusion of customs officials. The allegation was made shortly before the consultant's departure and it was not possible to obtain comment from either the FDA or customs.

Only three recent incidences of illegal trade were reported to have been detected. These were one lorry load in the northwest destined for Guinea Conakry and one in the southeast destined for San Pedro. The other case was a container of timber declared to be scrap metal that was shipped from Monrovia to Morocco. According to the NGO, SAMFU, this was despite detection of the fraud in advance of shipment. It can be assumed that there are many more undetected cases and allegations of collusion by officials increase the likelihood. No estimates were available of the potential volume of this illegal trade.

Internal and external flows of timber are shown in Map 6, though very limited information is available on the scale of trade.

10.5 Control of Timber Movement

The FDA is responsible for controlling all timber movement internally. Payment of $0.60 per plank is made by the transporters. Receipt for payment is issued by the Central Bank and a waybill is issued by the FDA, which allows free movement past FDA checkpoints. This procedure is followed despite the fact that all timber is currently produced illegally by chainsaw gangs. Collection of fees was one of a number of recommended reforms, which included COC control and enforcement.

Following the award of logging contracts exports of timber products will be allowed to resume subject to the exporter being registered and holding a timber export license valid for a single shipment. Licenses will be issued after determining that logs or timber products have valid COC to determine origin, and that all forest fees have been paid. Every six months the FDA will reconcile volumes of timber harvested, transported, processed and exported. The FDA has contracted SGS to develop a COC system (see below) and to be responsible for its management and issue of export permits.

The Ministry of Finance's Bureau of Customs and Excise (BCE) controls all exports through ports and land borders. Export is permitted if the exporter holds a valid export license and Pre-shipment Inspection (PSI) by BCE or its appointees confirms the validity of documentation and that cargo is correctly described. PSI was conducted by Bivac International, a subsidiary of Bureau Veritas Group, the international inspection company contracted by the government. Inspections could be conducted jointly with BCE and FDA officials at the ports or at point of container loading, after which the container or lorry was sealed and a customs release document issued. The use of Bivac was intended to provide transparency and credibility, however, it is alleged that for an unofficial fee of $250 Bivac staff would provide documentation allowing legal export regardless of container content. The SGS COC system has now replaced Bivac PSI.

The weaknesses in control of timber movement and export are that FDA has adopted the practice of authorizing transport of illegal produce, while providing insufficient enforcement to prevent illegal forest utilization, and there is corruption and collusion by all parties involved.

Timber Tracking

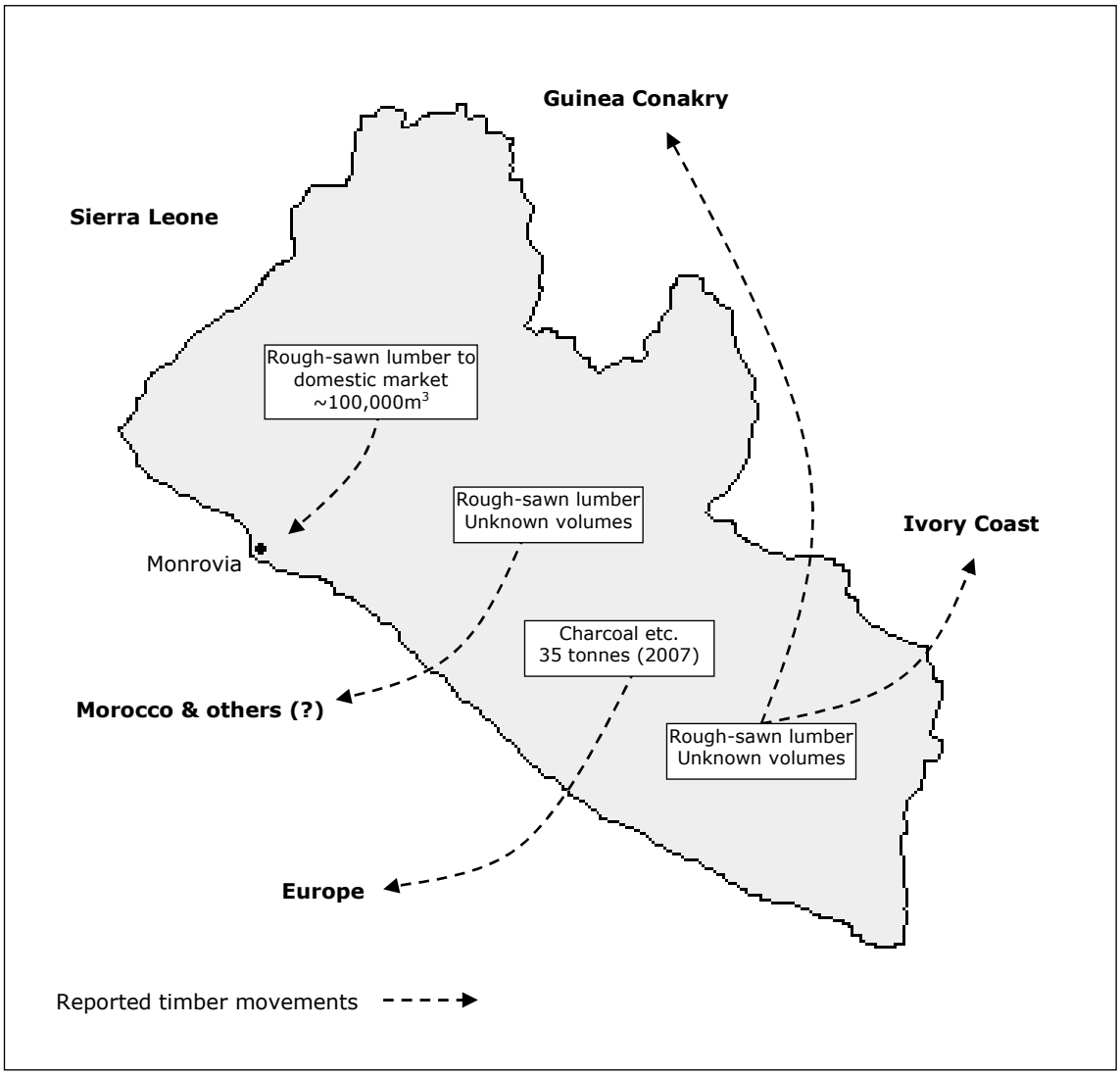
Liberia, with support from USA, has contracted SGS to manage a timber tracking system developed by Helveta UK. Based on barcode tagging, data entry using hand-held computers and satellite data transfer to a central server, the system maintains records of trees to be felled and provides stock maps showing tree location. At time of felling and at different points in the supply chain further data is recorded to provide back-to-stump traceability, and automatically analyzed to verify that all harvesting, transportation and processing is in compliance with user defined criteria aimed at preventing fraud such as the processing of unrecorded, illegally harvested timber.

Initially four SGS control points are to be established, two on the Ivory Coast border, one at Buchanan Port and one at Freeport Monrovia. Within 18 months, further control points will be set-up at Greenville and Harper to monitor exports and at six to seven bush locations to manage field operations. Control points will be manned by SGS staff, but operation will be handed over to the FDA in five years. The FDA will then have the option to buy software licences allowing internal operation of the Helveta database, but it is expected that database management will be contracted to Helveta.

By the end of 2008 it is intended that transport and processing of timber harvested from TSC and FMC areas, including any production by chainsaw loggers, will be subject to control by SGS and will have COC verification. SGS will not be responsible for chainsaw logging outside the concession areas, but will assist through its network of offices to monitor flows of chainsaw lumber. It will remain the responsibility of the FDA to enforce regulations outside concession areas.

If the implementation of the timber tracking system is successful it has the potential to greatly reduce or eradicate illegal logging and will provide an example to the rest of West Africa.

Map 6 Liberia - Timber Flows (2007)



10.6 Strengths & Weaknesses

Strengths

FDA has made considerable progress in revising procedures for allocation of concessions, along with related policy and legislation. It has also commenced informal negotiations with the EC under the FLEGT process to develop a VPA and LAS thus demonstrating an appreciation of the need for action to maintain future market options with Europe.

As the first nation in West Africa to adopt timber tracking, Liberia is embracing one of the few promising and available options to strengthen enforcement.

Weaknesses

Failure to control illegal logging by chainsaw loggers is the result of a lack of enforcement and commitment to control harvesting and transport. Only minor success can be claimed in the detection of three cases of illegal export (see Section 10.4), but the widespread allegations of corruption will undermine any efforts to improve the situation until it can be demonstrated that timber tracking is a workable solution.

Political pressure to increase revenue from the forestry sector might mean that reforms are being implemented too quickly and before the FDA has developed sufficient capacity to ensure that effective control is possible.

11. Nigeria Country Report

11.1 Introduction

Forestry and timber industries were formerly extensive and of major importance in Nigeria. Lumber and plywood was produced for both domestic and export markets. For over 30 years, as a result of resource depletion, the sector has been in decline. Industrial round wood export in 1964 was 781,200m^3, but by 1976 this had dropped to 26,900m^3. Nigeria has now banned the export of indigenous species logs and rough-sawn lumber.

The Federal Department of Forestry (FDF) acts as a policy setting and advisory body to the Federal and State Governments. Individual State Governments have authority over forest resource management and utilization in both forest reserves and off-reserve forest, but are expected to comply with national forest policy and legislation. A new policy addressing issues of trade, tariffs and certification was approved in 2006, and legislation is now being updated to reflect the changes. In reality FDF has very limited power and struggles for resources to effectively manage and monitor forest exploitation.

With executive power being vested in the states, comprehensive information on the forestry sector is unavailable from FDF, and in the time available it was not possible to access information covering all states. The FDF is currently attempting to establish a forest information service to improve the quality of data available.

11.2 The Forest Resource & Utilization

The FAO (2006) reports that Nigeria has about 11.0 million hectares of forest, which is 12% of the total land area, but largely savannah woodland with limited commercial potential except for the highly destructive production of charcoal. Forest reserves total 9.6 million hectares, but 75% of this is located in the savannah zone and only 2.0 million hectares in the high forest zone (FAO, 2003).

The high forest zone is restricted to the south of the country in the states of Akwaibon, Cross River, Delta, Edo, Ekiti, Ondo and Oyo, with the most intact and extensive remaining forest being located in Cross River State. The FDF estimate that about 975,000 hectares of forest reserves are productive and another 2.3 million hectares of off-reserve forests, which are located on privately owned or community land, are partially productive.

Traditionally, management was by allocation of concessions granted to timber industries, but the concession system began to collapse in the 1980s when local communities were allowed access to the forests and companies lost control. Forestry officials used to conduct monitoring from stump, but then moved monitoring to the forest-gate, and then abandoned virtually all attempt at control. Management focuses now almost entirely on revenue collection.

Concession management is no longer operational and much of the logging is undertaken by uncontrolled chainsaw gangs, with felled trees wastefully processed in-situ to produce rough-sawn planks for manual extraction to road side, or rafted as logs to point of sale. This trade is illegal or is given quasi-legal status through issue of waybills by forestry officials. Some revenue is collected by this means, but much is lost though corruption that is reported to be rampant.

Charcoal production is apparently widespread. This is a further activity being undertaken by rural dwellers. Produce is transported to urban centres for local sale or export. There is no control and production utilizes all wood in the vicinity so completely destroying surrounding forest. The extent and volume of this business is unknown, but thought to be substantial.

Community forest management was attempted in the 1990s in Cross River State with support from DFID, and continues to be supported by NGOs such as Concern Universal. The approach has government recognition and the intended procedure is that the state, subject to the consent of a landowner or community, controls harvesting by issue of logging permits. Control is weak and even if regulations are complied with it is thought that up to 60% of community logging is illegal and that there is no way of verifying that the other 40% is legal. For logging in off-reserve areas royalty revenues are split 70:30 between the community or owner and the government. For logging in forest reserve the split is 50:50 and for plantations it is 20:80. The success of community involvement has been heavily criticized, and apparently the heaviest depletion of forests in Cross River State is in areas managed by communities, including the areas formerly part of the DFID supported project. Reasons for the failure of this approach include:

- Government control and enforcement is almost non-existent
- Community share of royalty is rarely paid

- Powerful individuals negotiate directly with loggers and benefits are not shared or spent for the collective benefit of the community
- Community forest management committees have been ineffective in imposing control within their own communities and in dealing with government.

The lack of cooperation among communities and the rampant demand for timber mean that individuals and chainsaw loggers are able to capitalize on the overall weakness of controls, including the lack of effective community structures aimed to achieve localized control. Under the circumstances there is no guarantee that community forestry, without strong government enforcement, is the solution. Now that communities and chainsaw loggers have almost uncontrolled access to forest resources it will be a major challenge to prevent further forest depletion. Possibly, the continuing efforts of NGOs will eventually demonstrate some degree of success, but the key requirement is strong enforcement by the authorities, or through effective community management arrangements that can overcome the problems of corruption and lack of commitment.

11.3 Forest Industries

Timber processing industries are permitted to export semi-finished or finished product, which, according to factories visited, are principally flooring blanks produced from iroko and afzelia. Export of teak and gmelina logs is also permitted.

The main concentration of timber industries is in Edo State, but throughout Nigeria the timber industry is in general decline. In Cross River State, with the most abundant remaining forest resources, only five companies are still involved in export business. The biggest closure was the Hong Kong based Western Metal Products Company (WEMPCO) producing veneer for sale to plywood manufacturers in Lagos. The WEMPCO closure was enforced by the Cross River State Government in 2004 for failure to observe management guidelines. A great deal of pressure was brought to bear on the issue by the various NGOs active in the state.

Another Cross River based company, Rite Edge, was set up in 1996 for 100% export. Now, because of timber shortages in required species, only 25% of production is exported, mainly to Belgium and Finland. The remainder of production is low-quality furniture sold on the local market. The owner estimates that at least 40% of his raw material would fail to qualify as legal and this is consistent with the views expressed by other observers.

Acute timber supply shortages were borne out by the experience of a Lagos based company producing treated poles of teak and nauclea for export to Gambia and Niger. The company received its first delivery of logs for 2008 in April and was processing for the first time this year.

11.4 Timber Trade

Reported timber flows in Nigeria, with volumes where known, are shown in Map 7.

With an estimate population of about 150 million, Nigeria has an enormous domestic demand for construction and joinery timber. In regional and international markets Nigeria's principal relevance is in the context of its internal requirements. Nigeria is now a net importer of timber, but although export and import statistics are maintained on-line by the Nigerian Customs Service (NCS), access requires authorization, and to date this has not been provided.

The only official figures available for inflows were the Ghana Forestry Commission statistics, which record exports to Nigeria, almost exclusively of plywood, valued at about €22.5 million. Nigeria is a very convenient market for Ghana, with high prices paid and no concern about the legality of raw material.

While the domestic market may be using imported timber and timber products other than plywood, there is still a vast amount of timber being sourced locally from the operations of chainsaw loggers. Timber markets visited in Lagos and Cross River State were substantial, and consist of hundreds of small sawmilling and trading enterprises run in a very informal manner with minimal apparent regulation. Consequently, there are no accessible records to provide any reliable estimation of the volume of the domestic timber trade, although it is thought to exceed 10 million m^3 annually, excluding poles and firewood.

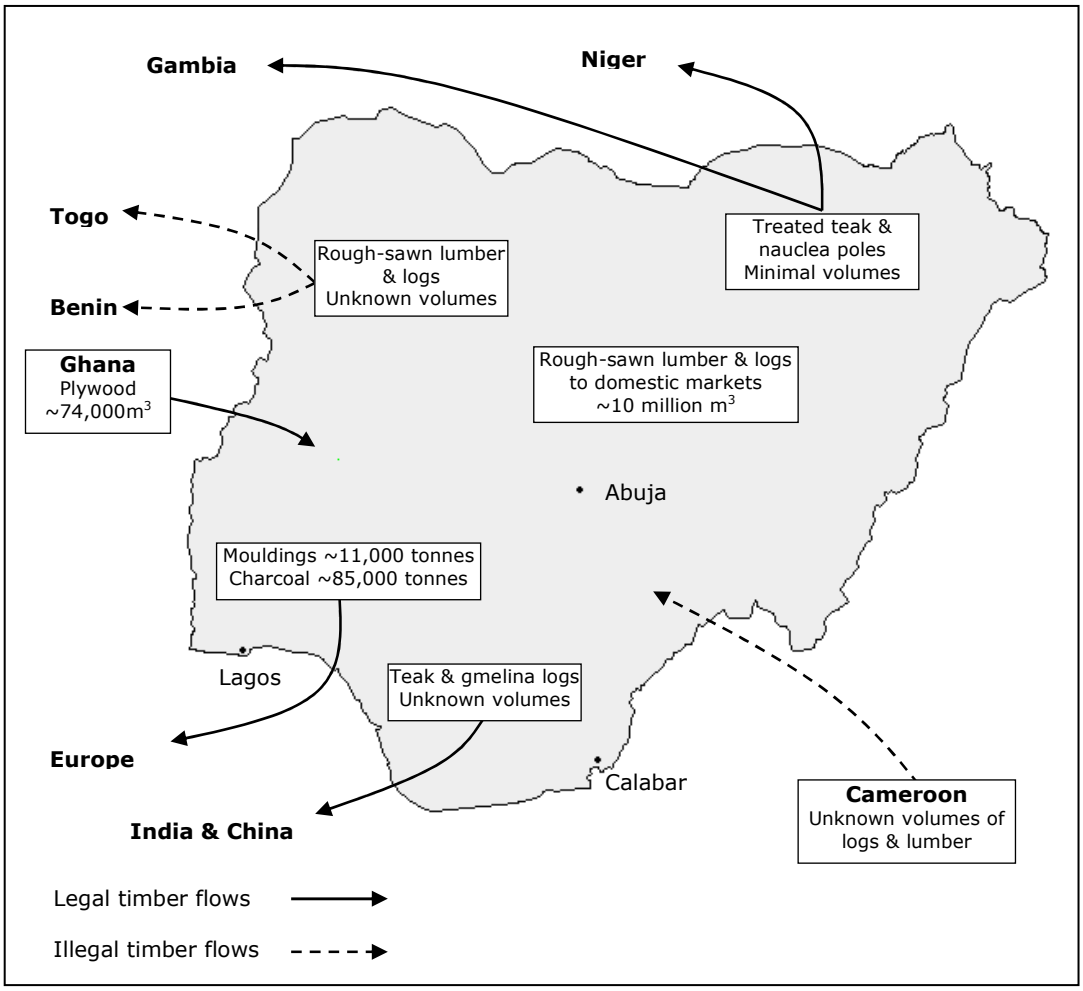
In Lagos the main timber market at Ebute Meta is one of many and is supplied with logs which are rafted from the delta region. Traders maintained that all logs were from this source. The market is therefore dependent largely on illegal raw material, or quasi-legal raw material, on account of waybills having been issued by forest authorities. Some of the timber traded in Ebute Meta market is allegedly exported or supplied to export processors.

In Calabar, trade was all in rough-sawn planks, allegedly sourced from within the state, but also possibly from Cameroon, nearby and separated by a river. Control of activity on the river was seen to be minimal and it is suspected that some timber, illegally produced in Cameroon, enters Nigeria by this route.

Witnesses also report logging trucks from Cameroon at the Ekang border station. Although there are no prohibitions on timber imports to Nigeria, subject to tariffs being paid, Cameroon has recently banned the export of certain log species and struggles to halt export of illegally produced timber. It is likely that a high proportion of any timber sourced from Cameroon is illegal, may have been brought illegally into Nigeria to avoid tariffs and is being laundered in the Nigerian domestic market. The policy of the forest authority is to apprehend improperly documented timber from Cameroon, fine the transporter and then issue documents allowing transport to market, thus facilitating the laundering process.

Cameroon is also reported to be the main source of logs and sawn-timber for Nigeria's central and eastern states, but no data or volume estimates were available.

Map 7 Nigeria - Timber Flows (2007)



International

Timber exports to Europe from 2001 to 2007 were reasonably constant with an average annual value of just under €29 million, but in 2007 less than €10 million was in timber exports, the balance being charcoal. The focus of this study was on commercial timber, but charcoal should be a major cause of concern as production is widespread, completely destructive and uncontrolled. Already there is enormous internal demand for fuelwood and charcoal. Exports to Europe have nearly quadrupled from 22,000 tonnes in 2001 to 85,000 tonnes in 2007 (see Annex 10 - Nigeria Exports to the European Union). The growing magnitude of this trade conflicts directly with the objectives of the FLEGT initiative in the region and the dramatic recent increase in exports, if continued, will have a devastating and accelerating impact on remaining local resources, which will eventually spread to regional resources. Any aspirations for sustainable forest management need to consider the issue of charcoal production and more information on the nature of the business and the trade is essential to determine actions that might be required.

Unknown quantities of teak are shipped to India, although if customs data was accessible official trade volumes should be quantifiable. The business is very rudimentary. Teak logs are brought into Lagos, squared in small road-side sawmills and manually loaded into containers for export. Harvesting is by uncontrolled chainsaw loggers and so has at best only the quasi-legal status conferred by issue of official waybills. The teak plantations are apparently being devastated as a consequence of this trade.

Regional Markets

Because of the huge internal demand, there is very little timber flow from Nigeria. It is reported that some wood from the local markets reaches Benin and Togo, but in the absence of data this trade cannot be quantified.

11.5 Control of Timber Movement

Internal control of timber movement is the responsibility of state forest authorities. Official waybills are issued to cover transport of logs or rough-sawn planks harvested in accordance with an official logging permit. However, issue of waybills is apparently without concern for regulations and so there are no effective constraints against movement of any timber, legally harvested in a community forest, or illegally by chainsaw loggers. Checkpoints manned by forest authorities were reported to be ineffective.

For export, an exporter must apply to the FDF. Checks are then made to determine:

- If the product is a permitted export & that it is not subject to CITES restrictions
- Whether documentation from state forest authorities confirms source and legality
- If the exporter is a legally entity registered with the Export Promotion Council.

If everything is in order the FDF issues a letter supporting the export. This is sent to the Ministry of Finance which then issues the export licence.

Photo 5 - Rough-sawn Lumber, Nigeria

Cameroon border near Calabar

No physical inspection of product is carried out by the FDF, though they maintain a restricted presence at ports to support the NCS. FDF officials, formerly stationed at all border crossings, have been withdrawn. A further weakness is that waybills are apparently easily obtained regardless of whether the timber source is known or legal. Documents accepted as confirming source and legality of raw material do not in fact provide any effective or verifiable assurances. Export permits therefore provide no satisfactory guarantee of legality.

The Nigeria Customs Service (NCS)

To export, an application has to be submitted to the local office of the NCS accompanied by commercial documents such as the Ministry of Finance Export Permit, business registration documents and a certified Nigeria Export Proceeds form. Most importantly, a Clean Certificate of Inspection (CCI) must be provided. The CCI is prepared at the time of a pre-shipment inspection, which is conducted by Cobalt Inspection Services, an international inspection company contracted by the Nigerian Government.

In order to avoid multiple examinations and minimize delay, NCS encourages all relevant agencies, including itself and FDF to work simultaneously with the inspection agent in order to verify quantity, quality and prices. If goods are containerized the container will be sealed after inspection and, subject to final inspection and approval of all relevant documentation, NCS will issue a Cargo Release Order permitting shipment. Although it is intended that multiple inspections are avoided, Moses Freights advise that multiple inspections may be undertaken, which is often the case if export consignments are transported loose to the port, when there will be an inspection on arrival and a further inspection at time of container loading.

For overland export goods must transported in a vehicle complying with the requirements of the ECOWAS Convention Relating to the Interstate Road Transit of Goods, which are sealable containers or enclosed lorries, or open lorries with goods covered by a sealable tarpaulin. Goods are inspected prior to sealing and the transporter is provided with an Inter State Road Transit Declaration describing the goods and destination. At border posts NCS will normal only inspect that the seal is intact.

Photo 6 - Container Loading, Lagos

Teak for export to India

NSC recognizes a need to streamline the system as it is acknowledged that the system is cumbersome and so short cuts are often taken, which means that the level of control is sometimes diminished.

Timber Tracking

In theory a tree should only be felled if a felling permit has been obtained and, when felled, forestry staff should hammer mark stumps and logs, and issue waybills. If this procedure was followed it would constitute a rudimentary procedure for timber tracking. However, forestry officials are rarely, and possibly never, present at the stump, and documents may be issued without adherence to procedures. It is therefore effectively impossible to verify the origin of any timber and therefore to determine legality.

There is currently no known intention to introduce timber tracking in Nigeria.

11.6 Strengths & Weaknesses

Strengths

Strengths are not obvious in the overall management of Nigeria's forestry sector, although there are a number of active NGOs which might be making some headway, working principally in conservation of protected areas and on forestry management issues with local communities.

The closure of WEMPCO for failure to comply with regulations was a rare positive sign.

Weaknesses

The forestry sector is riddled with weakness. State forestry authorities are focused almost entirely on revenue collection and are undertaking virtually no forest management. Enforcement is almost non-existent or completely ineffective because of widespread corruption. There does not seem to be any commitment to address the issues, but rather an acceptance that chaos is inevitable.

The depletion of Nigeria's forests, both natural and planted, will undoubtedly mean that pressure increases on nearby countries to supply Nigeria's enormous timber requirements.

Photo 7 - Ebute Market, Lagos

Log rafts from Delta Region at Ebute Market

12. Sierra Leone Country Report

12.1 Introduction

Forestry and timber industries are not a major component of Sierra Leone's economy. The average value of timber exports to Europe for 2004 and 2005 was only €110,000, whereas, for the year ended October 2005, exports of all products was recorded as $158 million (US Department of State, 2008).

Responsibility for the forestry sector is vested in the Ministry of Agriculture, Forestry and Food Security (MAFFS) with executive management by the Forestry Division, although there is no formal clarification of this as a previous regime shifted responsibility for environment and forestry to the newly created National Commission of Environment and Forestry (NaCEF). Under the current regime authority lies again under a ministry and the role for the NaCEF, which attracted $6.0 million of international funding, is unclear.

12.2 The Forest Resource & Utilization

The FAO (2006), reports that Sierra Leone has about 2.8 million hectares of forest, which, at 38.5% of the land area, is the highest proportion within the region. There is no differentiation between forest types and much of this could be savannah with the high forest concentrated in eastern part of the country. The closed high forest is thought to extend to 635,000 hectares and secondary forest to about 260,000 hectares. Loss of forest from 1990 to 2005 was estimated at about 300,000 hectares or 9.5%. Forest reserves and protected forests cover about 400,000 hectares with additional forest being located on private and community lands.

Since January 2008 all concession operations were suspended and logging banned because of concerns about environmental degradation. New guidelines have been prepared for issue of logging permits and there were rumours that recommencement of permit issue is imminent. The guidelines cover logging in community forests or forest reserves of less than 10 square miles, which can be approved by the Minister, and larger forest reserves, which require cabinet approval. The guidelines require:

- An investment proposal with, in the case of community or private lands, a letter of recommendation by the community chief or the landowner, and a land lease agreement.
- Pre-investment evaluation by the Forestry Division.
- If approved as pre-qualified, the investor must conduct a forest inventory and environmental impact assessment, and prepare forest harvesting and environmental management plans.

After final approval a concession agreement will be granted and the Forestry Division intends that only concessionaires will be permitted to export. Operations will be subject to supervision by the Forestry Division. However, the Forestry Division is not well resourced and it is unclear if the expertise exists to properly supervise the new guidelines and ensure effective implementation, especially as there might be a vast number of small, dispersed areas being legally harvested.

Before implementation of the ban, uncontrolled chainsaw logging operations had escalated, apparently initiated after the conflict in 2002 by Nigeria troops of the ECOWAS peace-keeping forces. Now illegal logging is often managed by Lebanese from Guinea Conakry and Liberia, who obtain agreements with chiefs and employ local people. In common with the rest of the region this involves felling and wasteful in-situ processing to produce planks that are manually extracted to roadside for onward transport with quasi-legal status conferred through payment of a fees and issue of official transport documents by the Forestry Division. Despite the ban on logging, which effectively stopped all concession based operations, chainsaw logging continues seemingly unabated, but now fees are collected not by government, but instead by forestry officials apparently for their own account.

Before the ban, community management of off-reserve forest areas was reported to be fraught with problems, including lack of any control and the sole beneficiaries being the powerful individuals within the community, and not the community at large. The lack of control and possible competition within communities for a share of the resource is undoubtedly a stimulus for the proliferation of chainsaw logging and a great deal of effort will be required if post-ban logging is to be improved in anyway.

Among previously legal operations, a Chinese company based in Guinea Conakry was licensed to log on the boundary of a nature reserve near Kamakwie in north-central Sierra Leone. Squared logs were exported through Conakry directly to China. The favoured species is *Baphia nitida* know locally as camwood, which is used for high quality woodworking such as manufacture of gun butts. In anticipation of the ban being lifted logging operations were reported to have recommenced and logs were being stockpiled. However, other reports indicated that export continued despite the ban.

12.3 Forest Industries

Forest industries are rudimentary and generally appeared to be moribund as a result of the ban. Production is principally rough-sawn lumber with very little added value processing.

Photo 8 - Timberyard, Sierra Leone

Rough-sawn chainsaw lumber for export processing, Kenema

One company visited had relocated in January 2007 from Guinea Conakry in response to an earlier logging ban imposed there. Using existing timber stocks, claimed to have been bought before implementation of the ban, the company was producing flooring blanks of afzelia and iroko that it proposed to export to Portugal when the ban was lifted. Previously all raw material was purchased from chainsaw loggers and undocumented, but in future the company asserts that it will only buy documented timber in order to be eligible for an export permit. Despite not having a concession, and so technically unable to export, the company is confident that it will be able to do so and that it will be possible to buy documented timber from chainsaw loggers. There is a clear expectation either that the guidelines will not be effectively implemented or that circumvention will be possible.

12.4 Timber Trade

Reported timber flows in Sierra Leone, with volumes where known, are shown in Map 8 although data is scant as statistics covering the timber trade were not available from the Forestry Division, the Ministry of Trade and Industry or the National Revenue Authority (NRA) and so no definitive figures can be provided either for legal or illegal trade, domestic or otherwise.

The domestic market is heavily reliant on rough-sawn planks used for construction and joinery, all of which is illegal because of the total ban currently in force. Representatives of the Agricultural & Community Timber Development Association (ACOTIDA), the association of local producers and traders, claim local shortages of timber because they cannot, unlike foreign operators, easily afford to pay the bribes being demanded by police and forestry officials. However, bribes are paid and considerable volumes of timber are still arriving in Freetown. All transport is done at night, but this is because of driver preference for operating when it is cooler and not to avoid scrutiny. Night operation apparently has no impact on the level of bribes paid.

Forestry Division staff acknowledge that cross-border trade happens, but have no data. Friends of the Earth allege that the main flow is to Guinea Conakry, and possibly also to Liberia, facilitated by high level political involvement and lack of control by forestry, police or NRA staff. Much of the timber bound for Conakry is thought to be for onward export to China. Conakry is the preferred route because the container lift at Freetown Port is often not operational and because many Chinese companies are based in Guinea Conakry.

A number of containers are known to have left Sierra Leone illegally and the Forestry Division advised that investigations are underway concerning three containers that had recently been shipped to China. NRA advised the 17 containers, either already shipped or now impounded, are under investigation having been declared falsely as household goods or empty. Again the destination is thought to be China. The real number of illegally exported timber cargoes, assuming that some are undetected, will clearly be higher, and it is also clear that China is a major destination and that Chinese nationals are complicit in the illegal trade.

Exports to Europe, legal or otherwise, are not thought to be occurring on any substantial scale, but in recent years have been increasing. From 2001 to 2007 the average annual value of exports to Europe was €526,000. The lowest recorded level was €85,000 in 2005, which is presumed to be the result of a steady decline in processing caused by internal conflict which ended eventually in 2002. Now, export volumes are increasing and in 2007 were worth €835,000, which was tenfold increase on the 2005 value. Nearly 90% of this was sawn-timber (see Section 3.3, Table 5, Table 6 and Annex 11 - Sierra Leone Exports to the European Union).

12.5 Control of Timber Movement

MAFFS Forestry Division, police and the NRA all play a role in controlling timber movement, but the Forestry Division claim that there is limited cooperation from the other authorities, and even obstruction. It alleges collusion in illegal timber export and claims that Forestry Division staff are not allowed access at time of container scanning.

Internally, the Forestry Division operates checkpoints to control timber movement, and before the ban were collecting revenue for issue of transport documents, apparently without concern for legality. The checkpoints are considered to be ineffective by NGOs and this is borne out by the continued movement of timber despite the logging ban.

For export consignments, the Forestry Division verifies product and specifications prior to container stuffing. Customs officers are also meant to be present at stuffing and are required to seal the containers, but NRA officials claim that they are not informed and sealing is done by agents.

1. The process to be followed for export is:
2. Exporter applies to MAFFS for export permit and sends Export Entry Form for assessment of fees payable and approval.
3. Form is passed to NRA's Non-tax Revenue Department, which issues a receipt upon payment of charges due.
4. Documents are scrutinized by customs and container inspection and sealing undertaken, although this frequently doesn't happen and instead is done by the shipping agent.
5. Customs authorize release for export to port authorities.
6. Container is scanned by a separate unit of the NRA and then released for shipment.

With the reported incidence of containers being shipped illegally, procedures are apparently not always properly followed, or there is collusion between government officials and exporters.

There are no effective procedures in operation for tracking timber origin and when concession agreements are re-implemented any tracking will be paper-based and may be open to abuse. Progress in Liberia with electronic tracking systems is being monitored and Sierra Leone may consider adoption of a similar system.

MAFFS, in collaboration with the Ministry of Trade & Industry and NRA, also has responsibility for issuing permits and controlling import of chainsaws and sawmills. It also collaborates with the Register General and municipal councils to issue permits to any enterprise wishing to trade in timber products.

12.6 Strengths & Weaknesses

Strengths

MAFFS has demonstrated a commitment to try and reform the forestry sector by submitting a request to the EC Delegation to commence FLEGT VPA negotiation and in January 2008 took radical action in banning logging and timber export.

Impressive commitment was shown by ACOTIDA, which wishes to ban all export, improve regulation of the trade and participate in reforestation initiatives. ACOTIDA asserts that through its nationwide membership it has better access to intelligence on what is happening in forest areas, and it is in a position to control sector activity through internal regulation of its members and through prevention of illegal activity by non-members.

The NGO sector is small, but active in publicizing illegal activity and injustices. The Sierra Leone Conservation Society has committed leadership and staff. It is actively involved in conservation and environmental education, particularly in the Gola Forest with support from the EC, the French Government, the Royal Society for Protection of Birds (UK), US-based Conservation International and the Jane Goodall Institute.

Weaknesses

Success in controlling illegal activity in both forestry and the export trade has been limited to non-existent and the widespread allegations of collusion and corruption by Officials of all agencies involved will be a major obstacle to achieving reform.

Map 8 Sierra Leone - Timber Flows (2007)

13. Togo Country Report

13.1 Introduction

Togo has never been an important country for timber trade and has always suffered shortages of timber for construction and furniture manufacture. Ghana was one of the main suppliers. Trade in new species such as teak or false-teak in recent years with Indian and Chinese buyers has fostered the export of raw material and reduced the size of local processing industries. Lomé Port is a free-port and, with limited controls exercised, has facilitated the transit or export of many products from the West African region during conflicts (e.g. containerized teak from rebel held areas in Ivory Coast).

13.2 The Forest Resource & Utilization

Togo has a total forest cover of 510,000 hectares, about 15,000 hectares of teak plantations, of which 60% are in public ownership and 40% are private, and 12,000 hectares of Eucalyptus, one-third state-owned and two-thirds privately owned (PEP, 2007). Since 1999, of the 83 protected forests, initially covering 800,000 hectares, half have been completely converted to agriculture and the remaining half are degraded and occupied by villagers. There is still some timber potential in the '*plateaux*' region and in conservation areas, which are often occupied by illegal settlements (see Annex 18 - Administrative Map of Togo).

Having very little forest, Togo obtains timber raw material from Ghana and Benin. Species supplied are iroko, samba, sapele and false-teak.

Timber statistics are difficult to evaluate as there is no real coordination between the different administrations of forestry, customs and port to provide consistent data on either the formal or informal timber trade.

The *Office d'Exploitation des Forêts* (ODEF) being in charge of state-owned plantations has the duty to provide teak or Eucalyptus logs and sawn-timber to local timber yards in Lomé and elsewhere. Better prices offered by Indian buyers have strongly influenced ODEF policy, which prioritizes direct export of teak to India rather than supplying the local market. The effect is twofold, firstly the annual harvesting plan is not adhered to and secondly, the plantations are becoming less well managed.

13.3 Forest Industries

Because ODEF is not providing teak to local timber traders or the local timber processing industries most are inactive and have had to close down, sawmills in particular. Furniture manufacturers work periodically when timber is available.

Togo-bois is sourcing teak from ONAB in Benin or is using other valuable species suitable for flooring such as false-teak and lingue or is getting iroko from local or external sources. Production of flooring is much reduced because of timber shortages despite efficiencies possible through use of waste timber.

Exports of containerized teak are managed by Indian buyers, and one local company, VIMA, is also involved. Chinese buyers are also having an impact on timber availability.

Many of the industries in Togo are small family businesses with little interest in issues of legality in either harvesting or trade.

13.4 Timber Trade

Reported timber flows in Togo, with volumes where known, are shown in Map 9.

Local & regional

34,000m^3 of acajou, fraké, iroko and samba are harvested from protected forests. This corresponds to one-quarter of the local supply and a further 90,000m^3 are imported to meet demand. There are internal wood flows from chainsaw gangs operating in teak plantations and the protected forests of the '*plateaux*' region.

The annual demand for fuelwood is about 1 million tonnes (660,000 tonnes of firewood and 280,000 tonnes of charcoal) mostly extracted from the '*plateaux*' and central regions. The growing demand will soon exceed the forest capacity and it was reported that mango trees and some timber trees are being used to produce charcoal. The annual consumption per capita is 347kg of firewood and 69kg of charcoal (see Annex 19 - Timber & Fuelwood Consumption in Togo).

Afzelia, iroko, lingue and samba timber is entering Togo at Badou border post from Ghana and some is exported to Burkina Faso. Lingue, rose-wood, teak and false-teak enter Togo at Kara border post from Benin. Teak from northeast Ivory Coast is transiting through Burkina Faso for export from Lomé Port.

International

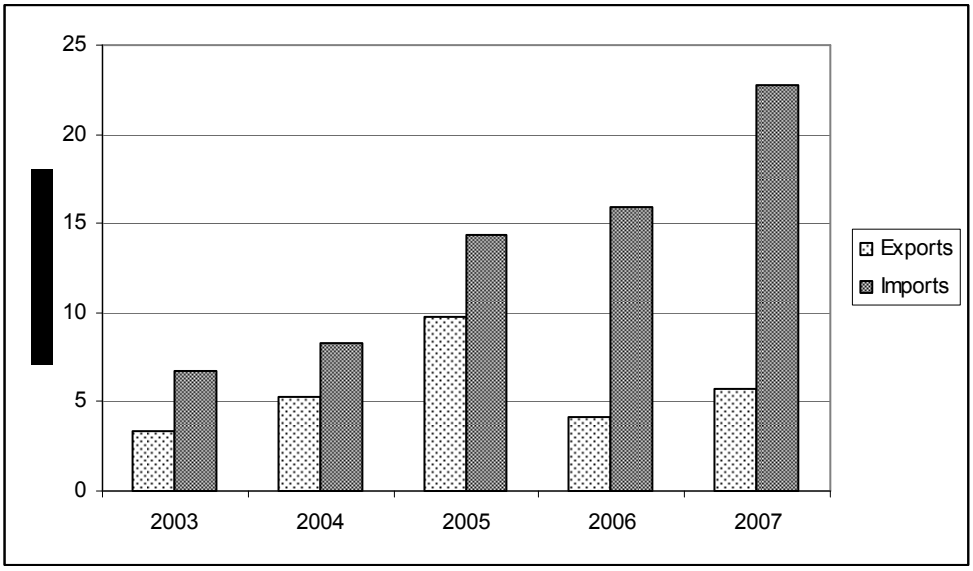
The national statistics division records average timber exports of 5,600 tonnes per year, which increased sharply to 9,700 tonnes in 2005, most probably because of teak in transit from Ivory Coast. Limited volumes are exported to Europe, with exports to Italy, France, Germany and Spain amounting to 1,665 tonnes, mostly secondary products including mouldings (50%) and sawn-timber (30%) (see Section 3.3, Table 5, Table 6 and Annex 12 - Togo Exports to the European Union).

The main export is of teak logs directly to India. Veneer and sawn-timber are exported to the ECOWAS countries of Benin, Burkina Faso, Ivory Coast and Niger.

During the eight month dry season, Chinese buyers are unofficially exporting as much as 20 containers of false-teak per day from the central region, which means about 12,000m^3 per month to China.

Officially recorded wood imports are exceeding by far the exports and are increasing each year (see Figure 11). In 2007, total annual imports were over 20,000 tonnes, of which Ghana supplies the majority at 10,000 tonnes. Benin supplies about 1,200 tonnes and the remainder comes from Ivory Coast or Nigeria. No plywood is produced in Togo and imports include both plywood and sawn-timber for construction.

Figure 11 Togo - Timber Exports & Imports (2003 to 2007)



Source: Direction Générale de la Douane, 2008 & Direction Générale des Statistiques Nationales

Comparing the statistics of customs and the national statistics division it is shown that about 25% of the trade is legal and 75% illegal (see Figure 12).

13.5 Control of timber movement

Control of the timber trade is a major challenge as there are over 600 timber-yards in Lomé and there are 120 freight forwarding companies operating officially in the freeport zone with a further 300 operating unofficially.

Teak is directly containerized in the field and sometimes sealed before entering Lomé Port. Transport documents are issued by the Ministry of Forestry stating the type of timber and volume, the route and the processing company. These documents should be stamped at each checkpoint. There is limited law enforcement and if timber is confiscated at a checkpoint it is often only immobilized for a couple of hours and then released on payment of a small fine. The frontier porosity makes control inefficient.

Forestry officials at Lomé Port did not keep statistics before September 2007 and now only record the number of containers without recoding details of timber species or product type.

Along the Wawa River, Badou is the main entry point from Ghana for sawn-timber of acajou, fraké and iroko as well as teak logs and squared false-teak. The wood from Ghana is transported either by boat or manually to timber yards where it will be later loaded in medium sized lorries of 10m^3 capacity. It is reported that 7 to 10 lorries per week are travelling to Lomé. Forestry, customs and police checkpoints are distant from each other, the police post being close to the river, and the customs and forestry checkpoints located near the road at Badou. Customs statistics record transit of less than 200kg per month in contrast to the 1,300m^3 per month recorded at the forestry checkpoint. Lorries are loaded by locals from Badou and the lorry driver makes a declaration at the Wawa forestry bureau, which may or may not be verified by forestry officials as counting each piece of sawn-timber is time consuming.

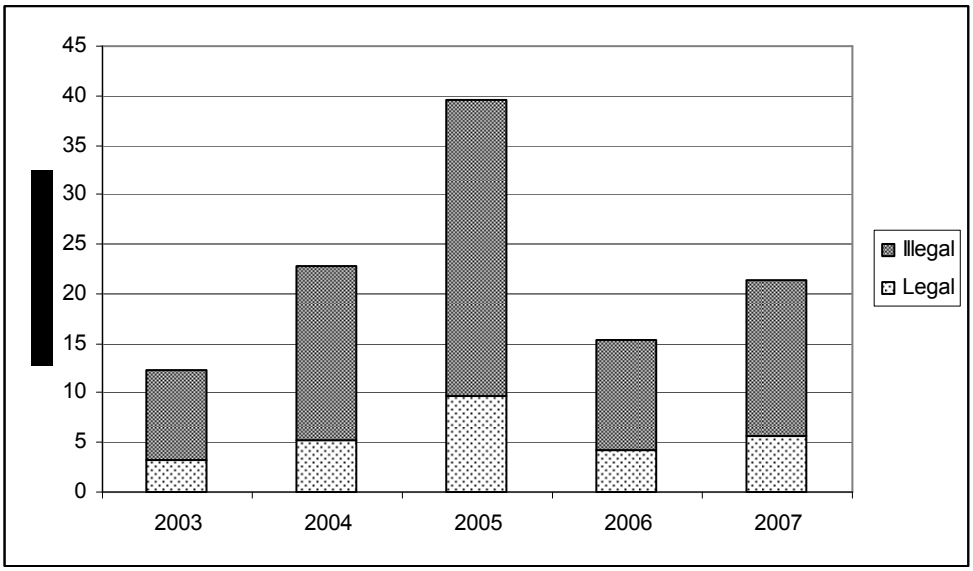
Customs procedures

Customs procedures are similar to other West African countries and require a conformity certificate checked by the forestry officials, which describes the timber species, origin and product type, an exportation statement issued by the Ministry of Forests, the bill of consignment and a letter of credit confirming that the payment will be made locally. After the final inspection by customs a loading statement is issued and containers can be loaded and sealed.

Timber-tracking

SGS in Lomé have recruited staff from Tanzania with experience of tracking procedures for teak and expect soon to be using this expertise in Togo. Up to now there are no procedures for tracing timber or timber products.

Figure 12 Togo - Illegal Timber Imports & Exports (2003 to 2007)



Source: Direction Générale de la Douane, 2008 & Direction Générale des Statistiques Nationales

13.6 Strengths and weaknesses

FLEGT Level of Interest, Capacity & Commitment

Only the forestry administration has any understanding of FLEGT. Professionals are interested to have more information, to be involved and to obtain financial support, as are the very active timber trade associations.

NGOs are diverse and some demonstrate a strong capacity, but have not enough financial support to tackle the illegal wood trade.

Problems

Problems include lack of effective enforcement, political instability since 1993 (demonstrations and killings), no land tenure reform, the unprofessional attitude of Lebanese, Chinese and Indians involved in the timber trade only for quick profits, uncontrolled extension of slash-and-burn agriculture for coffee and cocoa plantations in the '*plateaux*' region, forest fires and reduced collaboration with donors or aid programs since 1993. Teak plantation development and reforestation in protected forests is inadequate

and there is no capacity to evaluate and monitor remaining timber capacity in either planted or natural forest.

Forest permits are allocated to many individuals without tight control by the Ministry of Forestry.

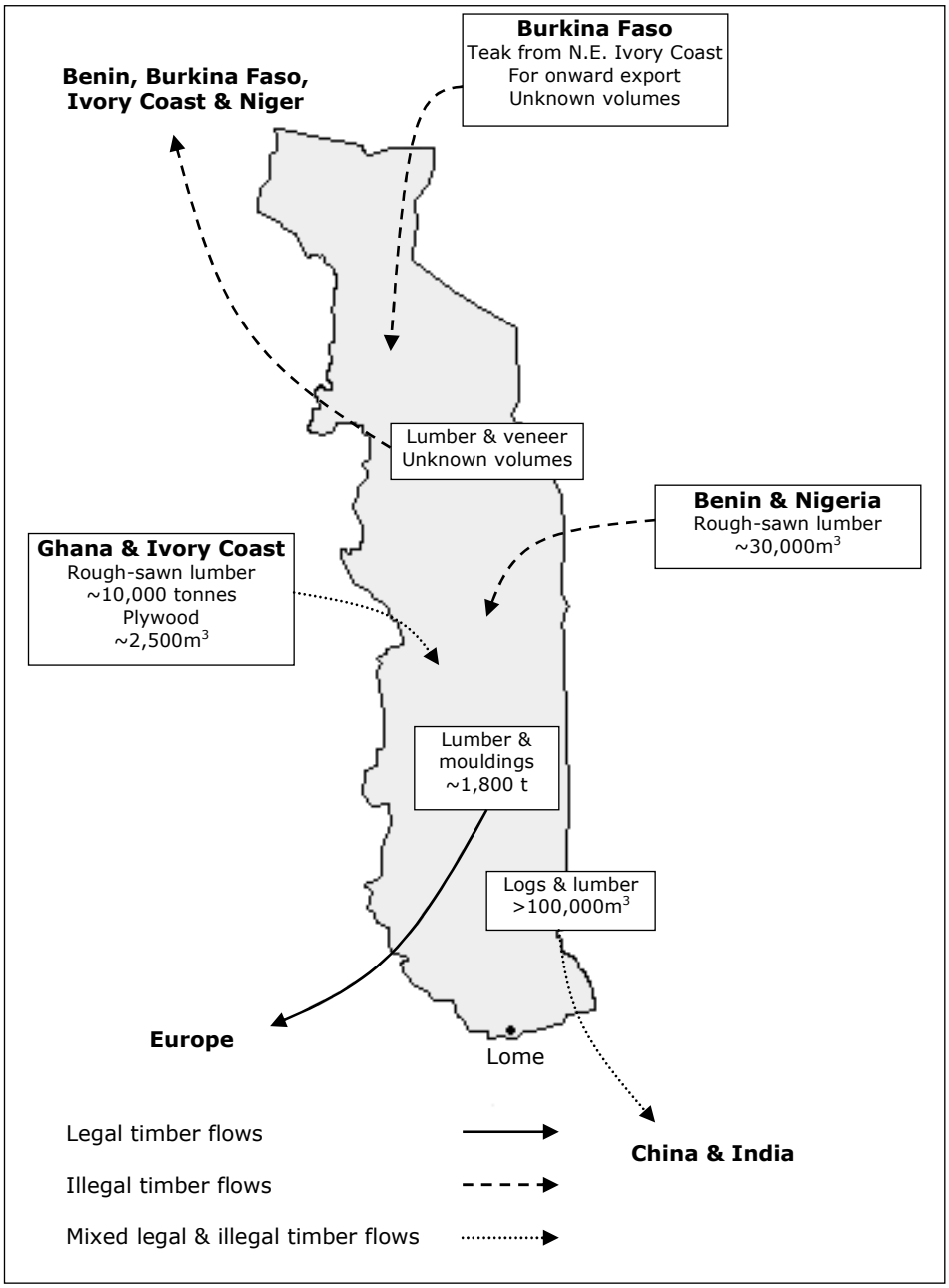
Administrative organizations have a high staff turn-over and there is a need to reinforce capacity and improve data collection and standardization.

Needs

ODEF state-owned teak plantations could benefit from privatization as the management arrangements have proved to be inefficient. Development of new teak plantations, by either the public or private sector, and rehabilitation of the former teak plantations and the 'plateaux' forests are needed to restore Togo's timber potential.

The Ministry of Forestry procedure of issuing logging permits and way-bills, which are used to harvest from the protected forests of Benin, undermines the effectiveness of forest patrols in Benin and the weaknesses in procedures should be reviewed.

Map 9 Togo - Timber Flows (2007)



References

Atse M. and Sessi K. 1999. Etude Economique du Secteur Forestier et de Faisabilité pour la Création d'un Fonds National Forestier au Togo. FAO.

CE-FAO 2001. Etude. Statistiques sur les produits forestiers non ligneux (PFNL). Programme Partenariat (1998-2000). Project GCP/INT/679/EC. Togo.

EC 2006. Country Environmental Profile of Ghana.

FAO 2001. Situation des forêts du Monde.

FAO 2003. Forestry Outlook Study for Africa.

FAO 2004. The Forest Revenue System and Government Expenditure on Forestry in Liberia.

FAO 2006. Global Forest Resource Assessment 2005.

Anon. FLux transfrontaliers du bois d'œuvre au Togo : cas de la frontière Ghana-Wawa.

Forestry Development Authority, Liberia 2007. Annual Report January 1 – December 31 2007.

Gadji A. Etude du flux transfrontaliers du bois et produits ligneux en Côte d 'Ivoire.

Global Lead 2008. Etude du flux transfrontaliers du bois et produits ligneux du Togo.

Greenpeace 2002. Forest crime file: country profile - Liberian timber trade fuels regional insecurity.

Ministère de l'Environnement et des Ressources Forestières 2007. Examen des progrès accomplis par le Togo sur la voix de l'objectif an 2000 de l'OIBT dans le cadre de la gestion durable des forêts tropicales. ITTO.

PEP 1997. Profil Environnemental Pays du Bénin, Côte d 'Ivore et Togo.

Port autonome de Cotonou publications statistics.

Rochow K.W.J., Simpson R., Brownell A., Pierson O. 2007. The Liberia Forest Concession Review: Lessons for resource management and restoration of the rule of law. Journal of Peacekeeping and Development

Statistiques de Direction Générale des statistiques, des douanes, des postes de contrôles eaux et forêts et douanes. Togo

Statistiques DISA, SPIB, port de San Pedro. Côte d 'Ivoire

Statistiques douanes, Foret Forte et informelle SDV-Delmas. Guinée Conakry

Statistiques Port autonome de Cotonou, Douanes et Ministère des Forêts. Bénin

THIAM A.T. 1991. Etude de marché des produits forestiers ligneux au Togo. Projet PNUD/FAO.

United Nations Security Council. 2003. Report of the Secretary-General in pursuance of paragraph 19 of resolution 1478 (2003) concerning Liberia.

US Department of State 2008. Background Note: Sierra Leone.

Woods, John, Blundell, Arthur G. & Simpson, Robert 2008. Investment in the Liberian Forest Sector – a Roadmap to Legal Forest Operations in Liberia. Forest Trends, Washington.

Annex 1 - Terms of Reference

Commission Framework contract

Terms of reference

Cross-border flows of timber and wood products in West Africa

I. Background

1.1 Introduction: The FLEGT process

a. Illegal logging and FLEGT

FLEGT stands for **Forest Law Enforcement, Governance and Trade.** The EU FLEGT Action Plan[i] sets out a programme of actions that forms the European Union's response to the problem of illegal logging and the trade in associated timber products.

Illegal logging results in serious environmental and social damage, as well as costing governments an estimated $10 billion every year in lost revenues. This was recognised in a G8 Summit in 1998, where measures to tackle illegal logging were discussed and an 'Action Programme on Forests' formally adopted.

Subsequently, in April 2002, the European Commission hosted an international workshop to discuss how the EU could contribute to measures to combat illegal logging. At the World Summit on Sustainable Development (WSSD), held in Johannesburg in the same year, the European Commission set out a strong commitment to combat illegal logging and the associated trade in illegally-harvested timber. The European Commission published its FLEGT Action Plan in May 2003.

A number of other initiatives, arising from both national and international commitments, have also developed in parallel. In particular, three regional FLEG (Forest Law Enforcement and Governance) processes have been established in East Asia, Africa (AFLEG) and Europe and North Asia (ENAFLEG). These processes, co-ordinated by the World Bank, have resulted in ministerial commitments to identify and implement actions to combat illegal logging in each region.

b. FLEGT Action plan

The Action Plan sets out a range of measures that aim to combat the problem of illegal logging. These focus on seven broad areas;

1. Support to timber –producing countries;
2. Activities to promote trade in legal timber;
3. Promoting public procurement policies;
4. Support for private sector initiatives;
5. Safeguards for financing and investment;
6. Use of existing legislative instruments or adoption of new legislation to support the Plan;
7. Addressing the problem of conflict timber.

c. FLEGT Voluntary partnership agreements

The Action Plan proposes voluntary, bilateral agreements between producing countries (FLEGT Partner Countries) and the EU. These Voluntary Partnership Agreements (VPAs) set out the commitments and actions of both parties to tackle illegal logging. The intended outcomes of VPAs are:

- Improved forest governance

- Improved access to markets within the EU for timber from Partner Countries;
- Increased revenues collected by Partner Country governments;
- Increased access to support and development for Partner Country governments;
- Implementation of more effective enforcement tools in Partner Countries;
- Improved foundations for sustainable forest management.

VPAs offer an approach by which legally-produced timber exported to the EU can be identified using licences issued by Partner Countries. These will be underpinned by timber legality assurance systems developed under the auspices of each VPA. FLEGT licenses covering timber shipments will enable EU customs agencies to distinguish verified legal timber from Partner Countries and to allow it entry to the EU, while excluding unlicensed timber from those countries. The assurance system will address controls on timber production, processing, internal verification, licensing and independent monitoring.

For more information on FLEGT VPA, see:
http://ec.europa.eu/development/Policies/9Interventionareas/Environment/forest/Forestry_intro_en.cfm

1.2 Context: FLEGT in West Africa

West Africa, from Nigeria to Guinée, has an important forest area and exports timber products to the European Union. Some countries have already expressed formally their interest for entering into a VPA with the European Union, namely Ghana and Liberia, Ghana being already in the formal negotiation phase.

Sierra Leone, Côte d'Ivoire and Nigeria might also be interested to enter into a VPA in a near future.

Within a VPA, each partner country proposes to set up a timber legality assurance system, and control of the supply chain. Wood tracing systems from the forest to the harbour through the processing units are to be designed and implemented to ensure that all timber and wood products that are exported are legal. All national production is however not directly exported to other continents from the national harbours, as some timber and wood products are used in the country or are traded within the region. Part of this flow is formal and for exporting to the EU or another continent from a country other than the country of origin, and the other part is for domestic or regional markets.

Within the framework of the VPAs, and more globally in the framework of the FLEGT Action Plan, the European Commission is interested to know more about the regional flows of timber and wood products. It also covers the issue of customs systems and the traceability systems at a national and regional level. In this context, the European Commission is launching the present study on cross-border flows of timber and wood products in West Africa.

II. Description of the assignment

2.1 Objective of the study

The objective of the study is to better understand the cross-border flows of timber and wood products in the region (Nigeria, Togo, Benin, Ghana, Côte d'Ivoire, Liberia, Sierra Leone, Guinea Conakry), the customs systems (for timber and wood products) and the traceability systems in place in the different countries.

The beneficiary of the study is the European Commission, Headquarters and Delegations in the region, in the perspective of FLEGT VPA preparation.

2.2 Requested services

The main activities required from the consultancy are the following:

1. Analysis of timber and wood products flows in the region, on the basis of existing reports, analyses and interviews with local stakeholders. Charts and maps showing where the flows take place, and how much per year is traded, formally and informally, legally and illegally, should be provided at national and regional level. Maritime exports to other regions, as well as continental exports (to the north or to Cameroon) should also be evidentiated.
2. Analysis of national customs procedures for timber and wood products, on the basis of existing laws and regulations, but also on the basis of visits to harbours and border posts, and interviews with local stakeholders.

3. Analysis of existing (and planned) systems of traceability for timber and wood products. This analysis should be done at national level and integrated into a regional perspective.
4. Preparation of a report, presenting the results of the analysis and highlighting the main issues in the context of the FLEGT Action Plan and FLEGT VPAs preparation.

2.3 Methodology aspects

The consultants will have a briefing by DEV B2 in Brussels before the mission, and a debriefing afterwards.

The consultants will base their analysis on existing reports and documents, missions in each country, and interviews with local stakeholders (forest and customs administration, civil society, forest private sector, wood industries, exporters, verification consulting firms, donors etc.).

In each country, the consultant will work in close collaboration with the EC Delegation, which may, in some countries, provide guidance on the study and identify specific issues more relevant for the national context and to be further explored. It is not expected that the EC Delegations provide logistical support for the consultants, who will be independent and will manage their logistics on their own.

Local short-term (1 to 5 days) expertise may be recruited to help the consultants in the countries. A total amount of maximum 25.000 € should be included under the provision of reimbursable to finance this local short-term expertise. Prior approval of the EC will be needed for contracting this expertise.

Consultants will clearly state that they work for a study financed by the European Commission, but that their opinion does not reflect the opinion of the European Commission.

2.4 Expected results

The main result will be a report, presenting the results of the analysis of the timber and wood products flows, customs procedures and traceability systems, at national and regional level, highlighting the main issues in the context of the FLEGT Action plan and FLEGT VPAs preparation.

III. Experts profile

The mission requires two international experts of category I

Both have the following profile:

Essential requirements:

- University degree (Graduate or Post-graduate) in Environment, Economics, Social Sciences, Agriculture or Forestry, or in other relevant areas directly linked to the mission.
- A minimum of 15 years of experience of forestry and environmental issues, including institutional aspects and forest policies.
- A minimum of 5 years of experience in the West African region
- Excellent analytical and communication skills.
- Ability to produce rapidly high-quality reports.
- Ability to understand the interrelated socio-economic, political, environmental and economic challenges of theses countries
- Ability to do field work
- Ability to function in a team

Desirable requirements

- Experience in trade of timber and wood products, directly or indirectly is an asset
- Experience in traceability systems is an asset

Language requirements

- One expert should be fluent in English (reading, speaking and writing).
- One expert should be fluent in French (reading, speaking and writing) and have a working knowledge of English.
- Working knowledge of French for the English-speaking expert would be an asset.

Complementarity of the experts is an asset.

Team leader can be expert 1 or 2, to be decided by the consulting firm

Together with the CV, the consortia will provide a methodological note, not longer than 2 pages explaining the methodology they intend to follow for this study. Primary views on how to deal with local short-term expertise, although not contractual, will also be part of the note.

This note will be adapted after the meeting and desk study foreseen in the first week, and will form a inception note, to be given to Aidco and Dev before departure to Ghana.

IV. Reporting

The report will not exceed 25 pages, plus annexes. It will highlight the main issues regarding trade of timber and wood products at the level of the countries and at the level of West Africa as a region. Key features regarding traceability systems and customs procedures will be presented. The report will make operational and pragmatic recommendations on how to deal with these main issues.

Description of the systems (customs systems, traceability systems) and description of the trade flows will be illustrated through maps, charts and flow diagrams, and presented in Annexes to the report.

When an annex is specific to a francophone country, it should preferably be prepared in French.

The report will be in English.

Annexes will be in English or French.

A one-page summary of the report in English should be provided.

An executive summary of 3 pages in French should also be provided.

A first draft report will be presented at the debriefing in Brussels.

A second draft report, including first comments from the debriefing will be sent, in electronic version to Aidco, Dev, Env, and to each EC Delegation of the region, not later than one week after the debriefing. Comments by those entities will be made to the consultants within a period of maximum 3 weeks. The consultants will then have an additional period of 2 weeks to take into account these comments, modify and fine-tune their report and send the final version of the report.

The final report will be sent in electronic version (MSWord and pdf format), as well as in 10 paper copies, in colour.

When preparing graphs, charts and maps, attention should be paid to the colours selected. Indeed, as some charts may be photocopied in black and white, it is important that the black and white copies are readable.

V. Location and duration

Missions will take place in the 8 countries of the region, with an approximate time presence in each country of 5 to 7 working days.

The mission will start with Ghana, where both experts will work together, before splitting: one consultant working in the Anglophone countries (Nigeria, Liberia, Sierra Leone), the other working in the Francophone countries (Guinée, Côte d'Ivoire, Togo and Benin).

The consultants will, in collaboration with DEV B2, inform the EC delegations beforehand of their travel schedule.

VI. Workplan and time schedule

Indicative starting date: March or April 2008

Task	Where	Working days for Expert 1	Working days for Expert 2
Briefing in Brussels with relevant Commission staff (AIDCO, DEV, ENV). Desk study and preparation of the country visits. Meetings with DEV Desk officers. Review of key documentation.	Brussels	5	5
Travel to Ghana		1	1
Work in Ghana, including briefing/debriefing with EC Delegation, Forestry administration, customs administration, Private sector, civil society and other stakeholders.	Ghana	5	5
Work in the countries, including briefings/debriefings with EC Delegation, Forestry administration, customs administration, Private sector, civil society and other stakeholders. Includes travel in the countries and travel between countries Includes pre-drafting of the report	Benin, Togo, Côte d'Ivoire, Guinea Conakry		28
Work in the countries, including briefings/debriefings with EC Delegation, Forestry administration, customs administration, Private sector, civil society and other stakeholders, Includes travel in the countries and travel between countries. Includes pre-drafting of the report.	Nigeria, Liberia, Sierra Leone	22	
Travel back to Brussels.		1	1
Debriefing with relevant Commission staff.	Brussels	2	2
Submission of the draft report (not later than one week after debriefing)		3	3
Corrections of the report and submission of final report (not later than five weeks after submission for the draft report)		2	2
Total number of working days		**41**	**47**

Contact points

AIDCO: joan.cummins@ec.europa.eu for contractual issues

DEV: mathieu.bousquet@ec.europa.eu for technical issues

---

[i] FLEGT Proposal for an EU Action Plan, 21 May 2003. Communication from the Commission to the Council and the European Parliament.

Annex 2 – TdR résumé en français

ETUDE DES FLUX TRANSFRONTALIERS DE BOIS BRUTS ET TRANSFORMES EN AFRIQUE DE L'OUEST

I. Description de la mission

1.1 Objectifs de l'étude

Les objectifs de l'étude sont de mieux connaître l'importance des flux de bois bruts et transformés au niveau régional (Nigéria, Togo, Bénin, Ghana, Côte d'Ivoire, Libéria, Sierra Leone, Guinée Conakry), le fonctionnement des systèmes nationaux de suivi des bois bruts et transformés et des législations douanières dans les différents pays.

Le bénéficiaire de cette étude est la Commission européenne, Siège et Délégations dans la région, dans la perspective de la négociation des accords de partenariat volontaires APV FLEGT .

1.2 Activités requises

Les activités principales sont les suivantes:

1. Analyse des flux de bois entre les pays de la région, sur base documentaire, rapports et interviews des différents parties et acteurs de la filière bois. Figures et cartes illustreront les localités où les flux de bois s'opèrent, les quantités annuelles commercialisés de façon formelle ou informelle, légalement et illégalement, à l'intérieur de chaque pays et au niveau régional. Les import-exportations par voie maritime (Cameroun et le bassin du Congo) ou continentale (Sahel) à d'autres régions seront aussi examinées.
2. Examen des législations douanières pour le bois bruts et transformés, à partir des lois, décrets, règlements existants, mais aussi par des visites aux principaux ports de commerce et de quelques postes frontières et d'interviews de tous les acteurs de la filière bois en particulier le secteur privé de transformation, le ministère des forêts, les syndicats du bois et les ONGs.
3. Analyse des systèmes de traçabilité existants ou en cours d'application pour le bois bruts et transformés. Cette analyse doit être conduite au niveau national et mise en perspective dans le contexte régional d'un marché commun Ouest-africain.
4. Préparation d'un rapport comprenant les principaux résultats de l'étude et soulignant les principaux points, conflits, dysfonctionnements dans le contexte de la mise en place du plan d'action FLEGT et des APV en Afrique de l'ouest.

Annex 3 - List of People Met

Benin

Abdou, Idrissou	CPAC ONG	Directeur
Adanmado, Franck	ASSOPIL ONG	Directeur
Adjadjihoue E, Luc	Afrique espoir ONG	Directeur
Adjomantin, Vincent	Chef Brigade douane Igolo vers frontière Nigéria	
Adjouninhin, Athanase	Chef Scierie ONAB (Bohicon)	
Adounvodehotin, Ulrich	Ministère du plan	Assistant technique
Agbangla, Gaétan	Ancien Directeur Technique Projet PAMF : Conseiller Technique du Ministre en Charge des Forêts	
Akani, Idrissou	Chef d'Unité gestion des Forêts ONAB (Bohicon)	
Akossou, O. Raphaël	Directeur Technique de l'ONAB (Bohicon)	
Akouehou, Gaston	Directeur du Projet Bois de Feu Phase II	
Akouta, Bertin	ANUB	Directeur
Alaho, Anzise	ANUB	
Amegankpoe, Claudia	ECO ECOLO ONG	Directrice
Araye, Cécile		
Ategui, Vincent	AERAMR ONG	Directeur
Ayadji et Fils	SOCAAF SARL* (Bohicon)	
Ayikpa, Josué	Rame	Formateur
Azogan, Celestin	PPD ONG	Directeur
Chabi M., Blanche	ANUB	
Cyriaque, Atti-Mama	Directeur général adjoint du port autonome de Cotonou	
Dako, Marthe Epse Djossou	ANUB	
Dan, Félicité Mme	Port autonome	Receveur de la Douane
Deguenon, Raoul	FNAFV Fédération nationale des artisans de branche fibres végétales	Président
Demide, Albertine	ANUB	
Djossou L., Benjamin		Opérateur économique
Fafolahan, Honorine	ANUB	
Gbegotossa, Paul	MJCD	Directeur
Guenier, Joëlle	Délégation de la Commission Européenne Bénin	Chargée programmes social et bonne gouvernance
Houaye, Kouassi Pierre	ONAB (Office National du Bois)	Directeur Général
Meenik, Hans	SNV ONG	Directeur
Mekoun, Raphaël	ANUB	
Nsia, Séverin	Ministère du plan	Expert local
Oude, Pascal	Ministère des Forêts et des Ressources Naturelles	Directeur Général
Sagbo, James	Douanes	Directeur général
Sodegla, Cocou, Honoré	CRAPE ONG	Directeur
Sossou, Justin	Global developpement ONG	Directeur
Soude Zinsou, Jacques	CIPCRE ONG	Directeur
Tabe, Lafia Paul	Receveur de la Douane à la Frontière TOGO (ILLACONDJI)	Receveur
Tchogou, Benoît	Chef de la Brigade forestière du Port	Chef de la Brigade forestière
Tchombou Yamgue, Augustin	Africa Teak	Directeur
Tokpanou, Nicita	Flambeau du progres ONG	Directeur
Zotto A., Solange	APASIC ONG	

EC Brussels

Bazill, John	EC Directorate-General	
Blundell, Art	DFID UK	
Bousqet, Mathieu	EC Directorate-General	Policy Officer
Bugeja, Alan	EC Directorate-General	Desk Officer Liberia
Falconer, Julia	EC Directorate-General	Forestry Officer
Gatta, Bruno	EC Directorate-General	Desk officer Guinea con
Mascagni, Oscar	EC Directorate-General	Aid Program
Pacifici, Attilio	EC Directorate-General	Desk Officer Nigeria
Rensi, Roberto	EC Directorate-General	Desk officer Ivory Coast
Vermaat, Jaap	Consultant to EC in Ghana	
Wall, Jeremy	EC Enterprise & Industry Directorate-General	Principal Administrator

Ghana

Abdullah, Mohamed	John Bitar Ltd.	Production Manager
Adeleke, Adewale	IUCN	FLEGT Project Facilitator
Agyeman, Fredua	Ministry of Lands Forestry & Mines	Technical Director
Asamoah-Twum, Kwaku	Customs, Excise & Preventative Service	Chief Collector
Attah, Alhassan	Forestry Commission, TIDD	Executive Director
Baffoe, Abraham	WWF GFTN	
Birikorang, Gene	Hamilton Resources & Consulting	Chief Consultant
Borker Bjerre, Niklas	EC Delegation Ghana	Programme Officer
Coleman, Henry	Forestry Commission, TIDD	Contract & Permit Manager
Helou, Rodrigue El	Ghana Primewood Products	Assistant general

		Manager
Katako, Albert	Care International	Project Manager
Manilio	Machinedwood	General Manager
Naezer, Dick	EC Delegation Ghana	First Counsellor
Nketiah, Sam	Tropenbos International Ghana	Programme Team Leader
Opoku, Kyeretwie	Civic Response	
Schneeman, Jochem	ICCO	Programme Officer
Guinea Conakry		
Barry, M.	Ministère Commerce Extérieur	Directeur adjoint
Bazzo, Didier	Office guinéen national des mangroves	Directeur
Bensemou, M.	NGO droits civiques	Directeur
Camara, M.	Douanes division commerce	Directeur Général
Camora, M.	OGUIB	Directeur général adjoint, Division statistiques.
Condé Karinka, M	Douanes	Directeur régional
Coulibaly, Mamoudou	Delmas SDV	Responsable commercial
Diallo, M.	OGUIB	Division statistiques assistant technique
Diallo, Aliou Nadhel	CFZ/EPIC/PGRF	Directeur Général
Hsu Chih-Liang Luc	SODEFA/Foret Forte	Directeur commercial
Keita, M.	Douanes DISA	Directeur
Keita, Moustapha	OGUIB	Directeur Général
Pallisco, Evelyne		Expert Local
Petit, Jean-Marie	Foret Forte Nzérékoré	Directeur Usine
Piergrossi, A.S.	Délégation Commission Européenne Guinée	Chef de délégation
Primot, Sophie	Délégation Commission Européenne Guinée	Chargée du programme développement rural
Sagno, Kourama Christine	Ministère de l'Environnement et des Eaux et Forêts	Directrice nationale
Serrada, Olga	Douanes	Directice générale
Traoré, M.	OGUIB	Division statistiques assistant technique
Traoré, Mohamed Lanakan	Ministère de l'Environnement et des Eaux et Forêts	Chef division législation forestières
Treittein, Tito	Foret Forte Conakry	Directeur export
Ivory Coast		
Adingra, Colonel Chantal	Direction de la Planification et de l'Evaluation (Ministère de l'Environnement et des Eaux et Forêts) DEPE	Directrice
Adingra, M. Joel	SMCI	Assistant du Directeur Général
Ahimin, Olivier	GNT-CI	Directeur de projet
Anoble, Felx M.	ANIMEX sarl	Directeur Général
Apata, Gustave M.	Direction de l'Informatique, des Statistiques et des Archives DISA	Directeur
Arrion, Michel	Délégation de l'Union européenne en Côte d'Ivoire	Chef de la Délégation
Bamba Boakary Siriki	Port de San Pedro	Responsable pré & post acheminement
Bessenda, M	Sodefor Daloa	Chef de district
Birkenmaier, Wilfried	SPIB	Président
Bourdoncle, Karine	CIB-SIFCI-SOFIDEX	Gérante
Coulibaly, Souleymane	SENBCI	Président
Diallo, Désiré	Port de San Pedro	Directeur Général
Elloh, Colonel	SODEFOR	Directeur Général Adjoint
Gadji, Abraham	Université d'Abidjan	Consultant local
Gardenal, Philippe	Tranchivoire	Directeur Général
Gbanzaï O. Maurice	SEPBA	Responsible administrative
Gueu, Gilles	African industries	Assistant du Directeur Général
Khochman, Salim	SISTB	Directeur Général
Larché, Fabien	Inprobois	Responsable commercial
Lhoest, Jean Marc	SEPBA	Directeur Général
Longenie, Dr. Francis	ONG Afrique Nature Internationale	Expert
Muraille, Bénérice	Délégation de l'Union européenne en Côte d'Ivoire	Chargée du programme développement rural
N'Goran, Gnamien	Direction générale de la Douane (ne pas été rencontré. Problème de disponibilité)	Directeur Général
Ober, Frédéric	DLH Côte d'ivoire SA	Directeur Général
Oualo, Colonel	Direction de la Production des Industries Forestières) DPIF	Directeur
Pintière, Sébastien Thomas de la	Délégation de la commission Européenne	Attaché
Rondeau, Guy	ONG Afrique Nature Internationale	Directeur
Seka, Lieutenant Seka	Direction de la Production des Industries Forestières) DPIF	Sous-Directeur
Servant, Jacques	Inprobois	Directeur
Singh, M.	Singh SA	Directeur
Tanoh, Capitaine A.K.A.	Direction de la Production des Industries Forestières) DPIF	Sous-Directeur
Tropini, Riccardo	Tropical bois	Directeur Général

Ubra, M	Covalma, haut Sassandra	Chef d'exploitation
Liberia		
Adewumi, Adewuyi	UN Mission in Liberia	Civil Affairs Expert
Brownell, Alfred	Green Advocates	
Buku, William	Ministry of Finance	Senior Collector, Freeport Customs
Duo, Sam	Toetown customs	
Golmo, Adala M.	Forest Development Authority	
Gorpudolo, Moses G.	Forest Development Authority	Manager Chain-of-Custody
Gweana, John	Forest Development Authority	
Horton, Emmanuel M.	National Port Authority	Port Manager, Freeport of Monrovia
Jenner, Martin	EC Delegation Liberia	Head of Operations
Jonathan Yiah	SDI	
Kotio, Alfred	Forest Development Authority	Commercial Department
Kpanan'Ayoung Siakor, Silas	Sustainable Development Institute	Director
Mosenene, Letla	FFI	
Mulbeh, Peter	SADS (Skill & Agricultural Dev. Service)	
Nyahn, Robert	SAMFU (Save My Future Fund)	
Odoum, Francis	IUCN	
Pichet, Thomas	SGS	Business Development Manager
Simpson, Bob	US Forest Service	USFS
Suaa, Daniel	Timber broker	
Toe, Charles	Toetown customs	
Vaye, Menleh	Chainsaw logger	
Yiah, Jonathan	Sustainable Developmnet Institute	SDI
Zwuen, Sormongar	Sustainable Developmnet Institute	SDI
Nigeria		
Adeleke, Alade	Nigeria Conservation Foundation	
Adeniyi, Wale	Nigeria Customs Service	Public Relations Officer
Afolabi, Amos	Federal Department of Forestry	Acting Director
Dunn, Andrew	Wildlife Conservation Society	Nigeria Representative
Fameso, Mr.	Federal Department of Forestry	Assistant Director
Ibironke Olubamise	Nigeria Conservation Foundation	
Ibol, Dr.	Forestry Commission Cross River State	
Inahoro, Alhaji Ibrahim	Nigeria Conservation Foundation	Coordinator SE Region
Isace, Fajimola	Nigeria Customs Service	Acting Controller
Jenkins, Peter	Drill Ranch	
Marx, Veronique	EC Delegation Nigeria	Project Officer
Oates, Prof. John	City University New York	
Odu Agbor, Dr. Chris	Forestry Commission Cross River State	Permanent Secretary
Olu, Mr.	Golden Seal	Production Manager
Onyekwere, Onyi	Right Edge	Coordinator Factory Operations
Plas, Daniel	EC Delegation Nigeria	First secretary
Pouakouyou, Daniel	FFI	
Sako, Dr. Jimoh	Ibadan university	
Sam, Ubi	Afi Mt Wildlife Sanctuary	
Taiye Ikuejamoye	Twins Omotore & Co.	Timber trader
The Manager	Nigeria Wood Preservation Co., Lagos	
Timber Trader	Akim Timber Market, Calabar	
Timber Trader	Ebute Timber Market, Lagos	
Tony, Mr.	Concern Universal	
Sierra Leone		
Adelino, Nicolau	Portimber Enterprises	
Allden, Hans	EC Delegation Sierra Leone	Head of Delegation
Amadu Lahai, James	Friends of the Earth	
Athkay, Bartholemew	MAFFS, Forestry Division	Director
Bangui, Osman	Ministry of Trade & Industry	Senior Assistant Secretary
Bano, Bah	Portimber Enterprises	
Banya, Dr. Sama	Sierra Leone Conservation Society	Chairman
Bappie, Augustine	ACOTIDA	
Barry, Alan	ACOTIDA	President
Blanshard, Nathaniel	Friends of the Earth	
Conteh, Michael	National Revenue Authority	Assistant Commissioner
Finnoh, A.B.	National Revenue Authority	Deputy Commissioner
Gboko, Chief Aruna	Kenema Chiefdom	
James, S. Inah.	National Revenue Authority	Collector of Customs & Excise
Koruma, A.P.	Sierra Leone Conservation Society	Ex-Chief Conservator
Lahai, Samu	Friends of the Earth	
Macauley, Belmont	Friends of the Earth	

Olatunde, Johnson	Friends of the Earth	Executive Director
Rahall, Joseph	Green Scenery	Executive Director
Ruesing, Matthias	EC Delegation Sierra Leone	Head of Rural Development Section
Sengarie, Abdullai	ACOTIDA	
Siaffa, D.D.	Sierra Leone Conservation Society	Executive Director

Togo

Adjaho, Koffi	VIMA	Directeur Général
Adjallah, Rogatien	ATOCPEF	Président
Adjima, Jules	Les Compagnons Ruraux ONG	Directeur
Agbayizato, Akadri Elois	CHALLENGES ONG	Directeur
Agbenda, Amana	Direction Générale des Douanes ; Ministère des Finances et des Privatisations, Administration des Douanes, Directeur de l'Informatique, des Statistiques douanières, de la Comptabilité et du Budget	Inspecteur des Douanes, directeur de l'iinformatique, des statistiques douanières
Akakpo, Adjoa Thérèse	ONG La Colombe	Directrice
Akakpo, Guetou M.	COMET ONG	Président
Akakpo, Vigniho J.	CONGREMA ONG	Directeur
Amagadje, Mawuli komi	Global lead	Directeur
Amegadze, Kokou	ADT – TOGO et CCOJ ONG	Directeur
Amegah, Kossi Dodji	ASD –TOGO ONG	Directeur
Amegnignon, Koami François	AJE – TOGO ONG	Directeur
Amouzou, Deborah	AUDACE - DFICO	Secrétaire
Amouzou, Tofa Sam	FONGTO	Président
Ayi, Yawo	TA SYTREBACT	
Chaoussi, Aliassou	Administration Forestière et Environnementale du Port Autonome de Lomé	Responsable
Comlan, Koffi	Président des Importateurs du bois d'œuvre	
Dagbovi, Affiwa	SYTREBACT	Conseillère
Dansrou, Kodjo	S. G. SYTREBACT	
Djenda, Aristide	UONGTO ONG	Directeur
Dzogbedo, Agbenyi	ADT –TOGO	Directeur
Guelly, Kudzo Atsu	Université de Lomé/Global Lead	Enseignant chercheur/consultant
Hunlede, Koué	Agricultural Services (Collateral Management) SGS-TOGO S.A.	Manager
Iroko, Basile	Union des Transporteurs de Bois	Directeur
Iroko, Kossi	DOAKPEH - TRANS	Dirrecteur
Iroko, Wolou	Union des Transporteurs de Bois	
Johnson, Ablamba A.	REJED – TOGO ONG	Directeur
Kassehin, K. Mensah	ONG CADI -TOGO membre de UONGTO	Directeur
Klogo, Koffi	APGA ONG	Directeur
Kodjo, Agbessinou	S. G. SYNAST	
Kokou, Kouami	Université de Lomé /Global Lead	Consultant local
Komake, Dosseh	SYTREBACT	Chargé d'éducation ouvrière
Koudouvo, Koffi	SYTREBACT	Invité
Kougbenya, Kossi S. A.	TJC – TOGO ONG	Directeur
Kougblenou, Yaovi Edouard	TMB, Ingénieur Bois (ENSTIB –France)	Responsable Production
Kponyo, Peace D. Abla	Ministère du Commerce de l'Industrie de l'Artisanat et des Petites et Moyennes Entreprises	Conseillère Technique
Legay, Denis	Délégation de la Commission Européenne Togo	Chargé développement rural
Maillot, Yves	SDV – TOGO; Groupe Bolloré	Directeur Transit
Melo de Sampaio, J.	Délégation de la Commission Européenne Togo	Chargé d'affaires
Modzi, Komi Mawuko	ONG / ATPH	Directeur
Nadjombe	ATOCPEF	Vice-Président
Olou-Adara Salifou	Union des Transporteurs de Bois	
Pekpe, Yawo Michel	Douanes Togolaises	Inspecteur Principal des Douanes
Ravizza, Gabriele	TOGO BOIS S.A. ; Membre du National Wood Flooring Association	Directeur Général
Samah, Salman Faris	ATTAC -TOGO et CCOJ ONG	Directeur
Seniou, Djaro	UONGTO ONG	Directeur
Single, Jérémie	Directionde l'Informatique, des Statistiques douanières	Directeur
Soga, Yawo	ONG CVA GREEN-TOGO membre de COMET	Directeur
Teou, Victoire	Hermovic	
Todzro, Mensah	RIOD -TOGO	Directeur
Vonor, Koami	ALTERNATIVES	Directeur

Annex 4 - Methodology

METHODOLOGY

Preparatory work in Brussels - 5 days

1. Attend briefing with relevant Commission staff (AIDCO, DEV, ENV).
2. Identify contacts in EC offices in Nigeria, Togo, Benin, Ghana, Côte d'Ivoire, Liberia, Sierra Leone, and Guinea Conakry.
3. Develop report structure and determine information requirements.
4. Conduct internet research and literature research to access any available trade statistics and determine the existence of any relevant legislation.
5. Identify government organizations involved in control of cross timber trade or likely to be sources of information.
6. Identify NGOs that are actively engaged on the ground with timber trade issues.
7. Prepare list of advance support requirements (i.e. contacting organizations and setting up meetings) and circulate to relevant EC staff.

In-country - 5 days per country plus travel (total 29 days for Anglophone countries or 35 for Francophone countries)

8. Hold introductory meeting with EC Delegation and determine status of VPA negotiations and main issues in the context of the FLEGT Action Plan and FLEGT VPA preparation.
9. Meet with the national forest authority to obtain information about legislation, extent and nature of trade, known information about principle trading points and measures either being taken or proposed to improve timber traceability.
10. Meet with customs authorities to find out about procedures, control mechanisms and any existing knowledge of trade volumes and trading locations.
11. Meet with timber trade organizations and industries to learn in detail the relevance and extent of cross-border trade.
12. Meet with relevant NGOs and other local stakeholders to determine their perspective on the issue of cross-border trade and any further information available.
13. With all organisations try to obtain comments and opinions on accuracy of official statistics in comparison with actual trade
14. Travel to points of import or export to witness timber trade, implementation of control measures and determine level of awareness of customs officials.

Debriefing and report submission and finalization - 7 days.

Annex 5 - Benin Exports to the European Union

Benin Exports to the European Union

Code	Product	Benin Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste									0.0
4402	Charcoal							7	7	0.2
4403	Logs & rough cut wood	233	26		45		36		85	2.8
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	967	1,038	1,123	1,080	1,566	1,346	881	1,143	37.5
4408	Veneer & sawn-timber ≤6mm thickness			2					2	0.1
4409	Mouldings	2,648	1,427	1,657	1,367	1,493	1,514	1,350	1,636	53.6
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products									0.0
4415	Packing cases, boxes, pallets, drums etc.									0.0
4418	Builders joinery	144	74	79	68	161	98	84	101	3.3
4419	Wooden table & kitchenware									0.0
4420	Furniture & fancy joinery	53	48	38	51	56	41	37	46	1.5
4421	Other		25	1	46	78	1	37	31	1.0
	Total	4,045	2,639	2,899	2,656	3,354	3,036	2,396	3,052	100.0

Code	Product	Benin Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste									0.0
4402	Charcoal							42	42	1.4
4403	Logs & rough cut wood	369	40		48		46		126	4.1
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	1,263	1,541	1,462	1,616	2,784	2,209	1,216	1,727	56.8
4408	Veneer & sawn-timber ≤6mm thickness			5					5	0.2
4409	Mouldings	1,717	1,049	1,038	952	921	829	637	1,020	33.6
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products									0.0
4415	Packing cases, boxes, pallets, drums etc.									0.0
4418	Builders joinery	108	90	50	82	129	55	102	88	2.9
4419	Wooden table & kitchenware									0.0
4420	Furniture & fancy joinery	23	11	6	16	5	7	11	11	0.4
4421	Other		10	0	16	81	0	14	20	0.7
	Total	3,480	2,740	2,561	2,729	3,920	3,147	2,022	3,040	100.0

Annex 6 - Ghana Exports to the European Union

Ghana Exports to the European Union

Code	Product	Ghana Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste	32	88	98	92	292	192	249	149	0.1
4402	Charcoal	637	989	1,002	748	777	544	799	785	0.6
4403	Logs & rough cut wood	3,288	2,330	3,009	1,866	1,493	1,041	1,576	2,086	1.7
4406	Railway sleepers						41		41	0.0
4407	Sawn-timber >6mm thickness	84,851	71,415	63,234	64,014	65,552	53,641	56,218	65,561	53.7
4408	Veneer & sawn-timber ≤6mm thickness	44,038	41,551	40,206	34,457	35,963	29,436	26,357	36,001	29.5
4409	Mouldings	4,538	6,623	7,348	7,602	8,242	7,707	7,495	7,079	5.8
4410	Particle board	29	127	13		4	13	31	36	0.0
4411	Fibre board	725	218	0	154	192			258	0.2
4412	Plywood & panel products	10,065	9,684	7,635	8,719	6,150	5,092	4,433	7,397	6.1
4415	Packing cases, boxes, pallets, drums etc.	14	9	11	42	4	2	1	12	0.0
4418	Builders joinery	1,181	1,724	854	821	1,354	2,721	2,131	1,541	1.3
4419	Wooden table & kitchenware	16	4	214	178	11	1	4	61	0.1
4420	Furniture & fancy joinery	763	576	687	442	517	743	591	617	0.5
4421	Other	114	332	526	292	392	794	904	479	0.4
	Total	150,290	135,669	124,838	119,426	120,944	101,968	100,788	122,103	100.0

Code	Product	Ghana Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste	143	318	349	252	983	581	1,057	526	0.4
4402	Charcoal	2,815	4,584	5,305	3,738	3,533	2,477	3,488	3,706	2.8
4403	Logs & rough cut wood	4,732	3,273	3,414	2,198	1,364	913	1,540	2,490	1.9
4406	Railway sleepers						80		80	0.1
4407	Sawn-timber >6mm thickness	111,196	91,092	83,846	82,616	80,976	65,219	65,257	82,886	63.3
4408	Veneer & sawn-timber ≤6mm thickness	29,506	28,566	30,297	24,115	23,486	17,775	15,587	24,190	18.5
4409	Mouldings	4,027	7,233	6,777	5,610	5,532	5,381	5,278	5,691	4.3
4410	Particle board	20	94	12		3	20	38	31	0.0
4411	Fibre board	873	239	1	150	171			287	0.2
4412	Plywood & panel products	11,477	13,740	11,313	11,038	6,739	6,362	4,685	9,336	7.1
4415	Packing cases, boxes, pallets, drums etc.	12	27	18	90	2	0	0	21	0.0
4418	Builders joinery	811	1,148	655	595	916	1,721	1,453	1,043	0.8
4419	Wooden table & kitchenware	7	0	57	44	3	3	1	16	0.0
4420	Furniture & fancy joinery	343	343	404	271	191	426	345	332	0.3
4421	Other	68	271	331	163	204	494	550	297	0.2
	Total	166,031	150,928	142,778	130,880	124,103	101,453	99,278	130,933	100.0

Annex 7 - Guinea Conakry Exports to the European Union

Guinea Conakry – Exports to the European Union

Code	Product	Guinea Conakry Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste						1		1	0.0
4402	Charcoal							8	8	0.2
4403	Logs & rough cut wood	1,453	511	140	481	147	369	2,676	825	19.1
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	2,627	1,479	1,066	2,317	3,849	4,500	781	2,374	54.9
4408	Veneer & sawn-timber ≤6mm thickness	170	27	267	142	1,286	1,014	84	427	9.9
4409	Mouldings	21	11	15		102	82	6	40	0.9
4410	Particle board	45	41	47		4	10	21	28	0.6
4411	Fibre board	168	100	99	369	325	241	224	218	5.0
4412	Plywood & panel products	62	19			158	1,005	529	355	8.2
4415	Packing cases, boxes, pallets, drums etc.			4		1			2	0.1
4418	Builders joinery	6	14	12		7	0		8	0.2
4419	Wooden table & kitchenware		0						0	0.0
4420	Furniture & fancy joinery	72	51	27	15	23	33	19	34	0.8
4421	Other	0	0	1	1	1	3	1	1	0.0
	Total	4,625	2,253	1,678	3,326	5,903	7,258	4,349	4,321	100.0

Code	Product	Guinea Conakry Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste						22		22	0.3
4402	Charcoal							45	45	0.6
4403	Logs & rough cut wood	4,352	1,528	312	2,016	584	962	5,826	2,225	27.9
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	4,556	2,241	1,631	3,658	6,253	7,171	1,357	3,838	48.1
4408	Veneer & sawn-timber ≤6mm thickness	55	30	212	197	1,337	1,109	95	434	5.4
4409	Mouldings	17	20	20		131	115	4	51	0.6
4410	Particle board	125	107	146		16	32	61	81	1.0
4411	Fibre board	527	209	397	1,675	1,243	822	700	796	10.0
4412	Plywood & panel products	98	28			218	1,232	639	443	5.6
4415	Packing cases, boxes, pallets, drums etc.			0		0			0	0.0
4418	Builders joinery	44	38	17		13	1		23	0.3
4419	Wooden table & kitchenware		1						1	0.0
4420	Furniture & fancy joinery	37	31	8	19	19	19	14	21	0.3
4421	Other	0	0	0	1	0	1	0	0	0.0
	Total	9,810	4,231	2,743	7,565	9,813	11,486	8,740	7,980	100.0

Annex 8 - Ivory Coast Exports to the European Union

Ivory Coast Exports to the European Union

Code	Product	Ivory Coast Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste		40	5					22	0.0
4402	Charcoal	675	391	577	458	102	387	459	435	0.2
4403	Logs & rough cut wood	3,949	1,847	1,977	3,163	4,054	2,576	3,295	2,980	1.2
4406	Railway sleepers	2,854	3,117	1,950	2,530	1,267	3,357	3,494	2,653	1.1
4407	Sawn-timber >6mm thickness	190,643	160,461	131,293	152,953	149,795	127,193	135,806	149,735	62.1
4408	Veneer & sawn-timber ≤6mm thickness	61,431	51,554	48,403	49,876	57,229	54,874	56,844	54,316	22.5
4409	Mouldings	18,434	14,250	15,986	19,494	17,018	13,716	10,742	15,663	6.5
4410	Particle board	194	67		6	69	25	1	60	0.0
4411	Fibre board				58	1			29	0.0
4412	Plywood & panel products	12,807	10,672	9,097	8,843	9,670	9,853	10,117	10,151	4.2
4415	Packing cases, boxes, pallets, drums etc.		4	21	23				16	0.0
4418	Builders joinery	2,211	2,434	2,128	2,364	3,397	2,701	4,219	2,779	1.2
4419	Wooden table & kitchenware	5	20	9	3	25	2	2	9	0.0
4420	Furniture & fancy joinery	765	719	593	396	406	344	347	510	0.2
4421	Other	3,666	2,727	2,052	1,163	925	988	1,571	1,870	0.8
	Total	297,634	248,303	214,091	241,330	243,958	216,015	226,897	241,230	100.0

Code	Product	Ivory Coast Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste		77	49					63	0.0
4402	Charcoal	2,265	1,251	1,916	1,559	388	1,710	1,937	1,575	0.5
4403	Logs & rough cut wood	7,131	2,205	2,388	2,984	3,773	2,881	3,436	3,543	1.2
4406	Railway sleepers	6,355	5,962	4,329	4,876	2,579	6,588	6,216	5,272	1.8
4407	Sawn-timber >6mm thickness	278,323	233,667	180,891	203,219	187,513	162,619	165,151	201,626	69.3
4408	Veneer & sawn-timber ≤6mm thickness	60,149	47,342	47,671	51,186	58,975	54,539	55,717	53,654	18.4
4409	Mouldings	14,982	10,583	11,180	15,013	10,248	8,823	8,383	11,316	3.9
4410	Particle board	146	69		19	129	25	1	65	0.0
4411	Fibre board				77	1			39	0.0
4412	Plywood & panel products	12,545	9,704	8,610	9,410	10,228	10,812	10,714	10,289	3.5
4415	Packing cases, boxes, pallets, drums etc.		19	58	54				44	0.0
4418	Builders joinery	1,475	1,658	1,559	1,742	2,380	1,738	2,690	1,892	0.7
4419	Wooden table & kitchenware	1	2	8	4	12	3	1	4	0.0
4420	Furniture & fancy joinery	233	194	185	100	125	127	155	160	0.1
4421	Other	2,168	1,657	1,397	940	846	798	1,158	1,280	0.4
	Total	385,770	314,389	260,240	291,182	277,196	250,662	255,558	290,821	100.0

Annex 9 - Liberia Exports to the European Union

Liberia – Exports to the European Union

Code	Product	Liberia Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste		32						32	0.1
4402	Charcoal							123	123	0.3
4403	Logs & rough cut wood	69,801	62,906	38,858				1	42,892	90.0
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	5,109	7,874	2,052	31				3,767	7.9
4408	Veneer & sawn-timber ≤6mm thickness	23	372	495					297	0.6
4409	Mouldings							29	29	0.1
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products		99	904					501	1.1
4415	Packing cases, boxes, pallets, drums etc.									0.0
4418	Builders joinery									0.0
4419	Wooden table & kitchenware									0.0
4420	Furniture & fancy joinery				5			1	3	0.0
4421	Other	2						0	1	0.0
	Total	74,935	71,284	42,309	36	0	0	154	47,644	100.0

Code	Product	Liberia Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste		61						61	0.0
4402	Charcoal									0.0
4403	Logs & rough cut wood	236,984	218,072	146,963				12	150,508	94.5
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	8,800	15,785	3,915	65				7,141	4.5
4408	Veneer & sawn-timber ≤6mm thickness	21	508	729					420	0.3
4409	Mouldings							23	23	0.0
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products		170	1,934					1,052	0.7
4415	Packing cases, boxes, pallets, drums etc.									0.0
4418	Builders joinery									0.0
4419	Wooden table & kitchenware									0.0
4420	Furniture & fancy joinery				3			0	1	0.0
4421	Other	7						0	4	0.0
	Total	245,813	234,595	153,540	67	0	0	35	159,208	100.0

Annex 10 - Nigeria Exports to the European Union

Nigeria – Exports to the European Union

Code	Product	Nigeria Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste				10	7		92	36	0.1
4402	Charcoal	5,213	3,980	5,903	8,984	11,511	15,142	19,656	10,056	34.8
4403	Logs & rough cut wood	1,060	462	446	235	446	510	297	494	1.7
4406	Railway sleepers	166		5			10	59	60	0.2
4407	Sawn-timber >6mm thickness	14,147	6,917	7,717	6,790	8,336	7,262	5,606	8,111	28.1
4408	Veneer & sawn-timber ≤6mm thickness					39			39	0.1
4409	Mouldings	15,743	12,656	11,082	10,568	9,157	6,257	3,333	9,828	34.1
4410	Particle board					2			2	0.0
4411	Fibre board	18							18	0.1
4412	Plywood & panel products				10				10	0.0
4415	Packing cases, boxes, pallets, drums etc.						48		48	0.2
4418	Builders joinery	110	117	113	122	116	60	100	105	0.4
4419	Wooden table & kitchenware	0		0	0	1	2	1	1	0.0
4420	Furniture & fancy joinery	63	51	40	29	28	45	33	41	0.1
4421	Other	9	11	13	2	43	12	4	13	0.0
	Total	36,528	24,194	25,318	26,751	29,686	29,347	29,183	28,863	100.0

Code	Product	Nigeria Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste				88	22		481	197	0.3
4402	Charcoal	22,124	17,020	25,933	41,907	51,532	63,881	85,050	43,921	67.7
4403	Logs & rough cut wood	1,694	603	688	246	456	517	314	645	1.0
4406	Railway sleepers	443		40			18	127	157	0.2
4407	Sawn-timber >6mm thickness	21,988	10,408	11,683	10,849	12,384	8,799	8,311	12,060	18.6
4408	Veneer & sawn-timber ≤6mm thickness					36			36	0.1
4409	Mouldings	11,722	9,484	9,064	8,399	7,093	5,306	2,415	7,640	11.8
4410	Particle board					0			0	0.0
4411	Fibre board	36							36	0.1
4412	Plywood & panel products				10				10	0.0
4415	Packing cases, boxes, pallets, drums etc.						25		25	0.0
4418	Builders joinery	217	177	140	194	155	43	123	150	0.2
4419	Wooden table & kitchenware	0		0	0	0	0	0	0	0.0
4420	Furniture & fancy joinery	20	13	44	6	21	17	20	20	0.0
4421	Other	4	18	21	0	20	14	0	11	0.0
	Total	58,246	37,723	47,613	61,699	71,717	78,619	96,841	64,908	100.0

Annex 11 - Sierra Leone Exports to the European Union

Sierra Leone – Exports to the European Union

Code	Product	Sierra Leone Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste	2	2						2	0.4
4402	Charcoal							22	22	4.2
4403	Logs & rough cut wood		21			61	48	20	37	7.1
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	103	111	74	112	8	162	729	185	35.3
4408	Veneer & sawn-timber ≤6mm thickness	43	69						56	10.7
4409	Mouldings	6	19					56	27	5.2
4410	Particle board									0.0
4411	Fibre board		36	16					26	5.0
4412	Plywood & panel products		8						8	1.6
4415	Packing cases, boxes, pallets, drums etc.	18		3	6				9	1.8
4418	Builders joinery	48	183	38		10	0		56	10.6
4419	Wooden table & kitchenware	30	15	26					24	4.5
4420	Furniture & fancy joinery	2	1		3			8	4	0.7
4421	Other	155	124	45	15	4			69	13.1
	Total	408	590	202	137	82	209	835	526	100.0

Code	Product	Sierra Leone Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste	25	24						24	3.1
4402	Charcoal							88	88	11.2
4403	Logs & rough cut wood		96			257	193	33	145	18.4
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	130	198	98	383	13	207	963	285	36.2
4408	Veneer & sawn-timber ≤6mm thickness	13	71						42	5.3
4409	Mouldings	3	16					72	30	3.8
4410	Particle board									0.0
4411	Fibre board		144	24					84	10.7
4412	Plywood & panel products		4						4	0.5
4415	Packing cases, boxes, pallets, drums etc.	15		11	3				9	1.2
4418	Builders joinery	29	84	50		1	0		33	4.2
4419	Wooden table & kitchenware	9	3	5					5	0.7
4420	Furniture & fancy joinery	0	0		4			2	2	0.2
4421	Other	51	83	39	5	0			36	4.5
	Total	275	722	227	395	272	400	1,158	786	100.0

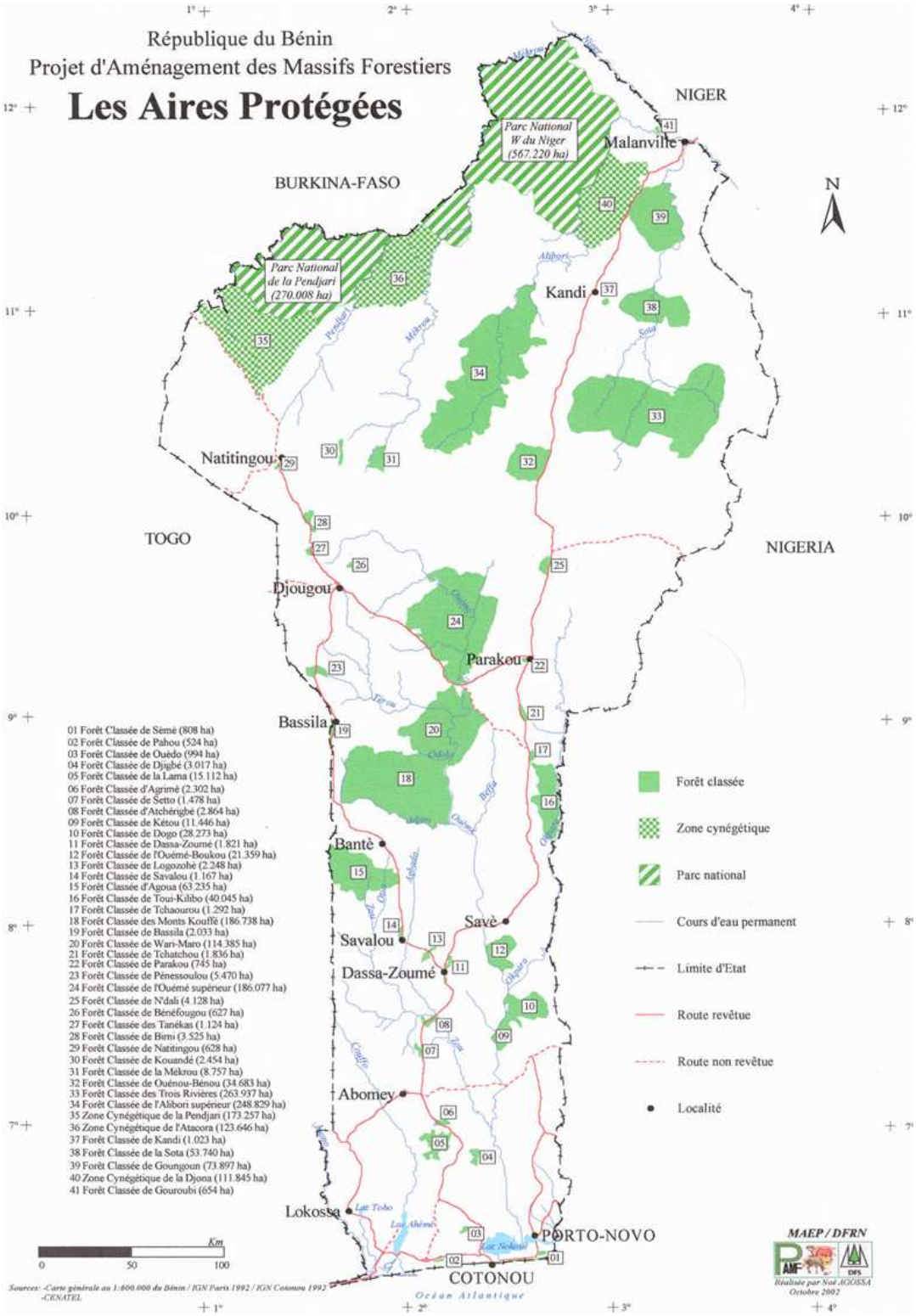
Annex 12 - Togo Exports to the European Union

Togo – Exports to the European Union

Code	Product	Togo Exports to the EU (EUR x 1000)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste									0.0
4402	Charcoal	11							11	0.5
4403	Logs & rough cut wood	27			1		1		10	0.4
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	1,321	397	419	54	43	141	116	356	16.0
4408	Veneer & sawn-timber ≤6mm thickness						4	54	29	1.3
4409	Mouldings	62	946	2,119	2,179	1,614	1,089	1,473	1,354	60.8
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products									0.0
4415	Packing cases, boxes, pallets, drums etc.	13	79	18	83				48	2.2
4418	Builders joinery	17	34	166	22	176	3	0	60	2.7
4419	Wooden table & kitchenware	2	1	5	3	3		0	3	0.1
4420	Furniture & fancy joinery	536	525	303	321	241	252	204	340	15.3
4421	Other	13	42	21	11	4	8	10	16	0.7
	Total	2,002	2,024	3,052	2,675	2,080	1,498	1,857	2,227	100.0

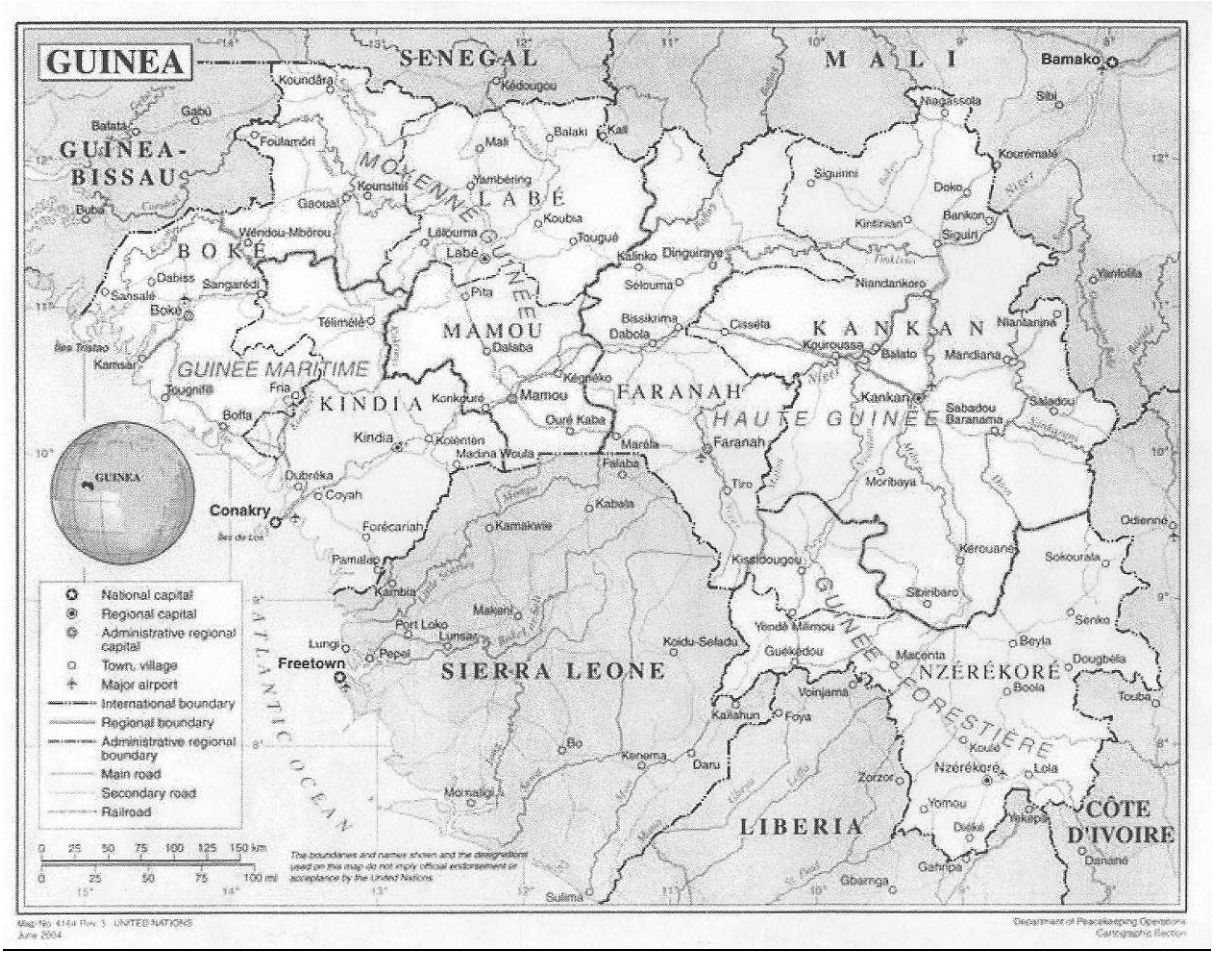
Code	Product	Togo Exports to the EU (Tonnes)							Average	
		2001	2002	2003	2004	2005	2006	2007	EUR	(%)
4401	Fuelwood, woodchips, sawdust & wood waste									0.0
4402	Charcoal	65							65	3.9
4403	Logs & rough cut wood	64			125		0		63	3.8
4406	Railway sleepers									0.0
4407	Sawn-timber >6mm thickness	2,019	527	658	125	45	97	125	514	30.9
4408	Veneer & sawn-timber ≤6mm thickness						6	23	14	0.9
4409	Mouldings	55	575	1,433	1,420	977	615	789	838	50.3
4410	Particle board									0.0
4411	Fibre board									0.0
4412	Plywood & panel products									0.0
4415	Packing cases, boxes, pallets, drums etc.	16	96	21	81				53	3.2
4418	Builders joinery	16	15	132	12	95	1	0	39	2.3
4419	Wooden table & kitchenware	1	0	1	1	0		0	0	0.0
4420	Furniture & fancy joinery	91	84	68	66	55	53	47	66	4.0
4421	Other	16	43	21	3	1	3	1	12	0.7
	Total	2,342	1,340	2,333	1,832	1,172	775	985	1,665	100.0

Annex 13 - Forest Map of Benin



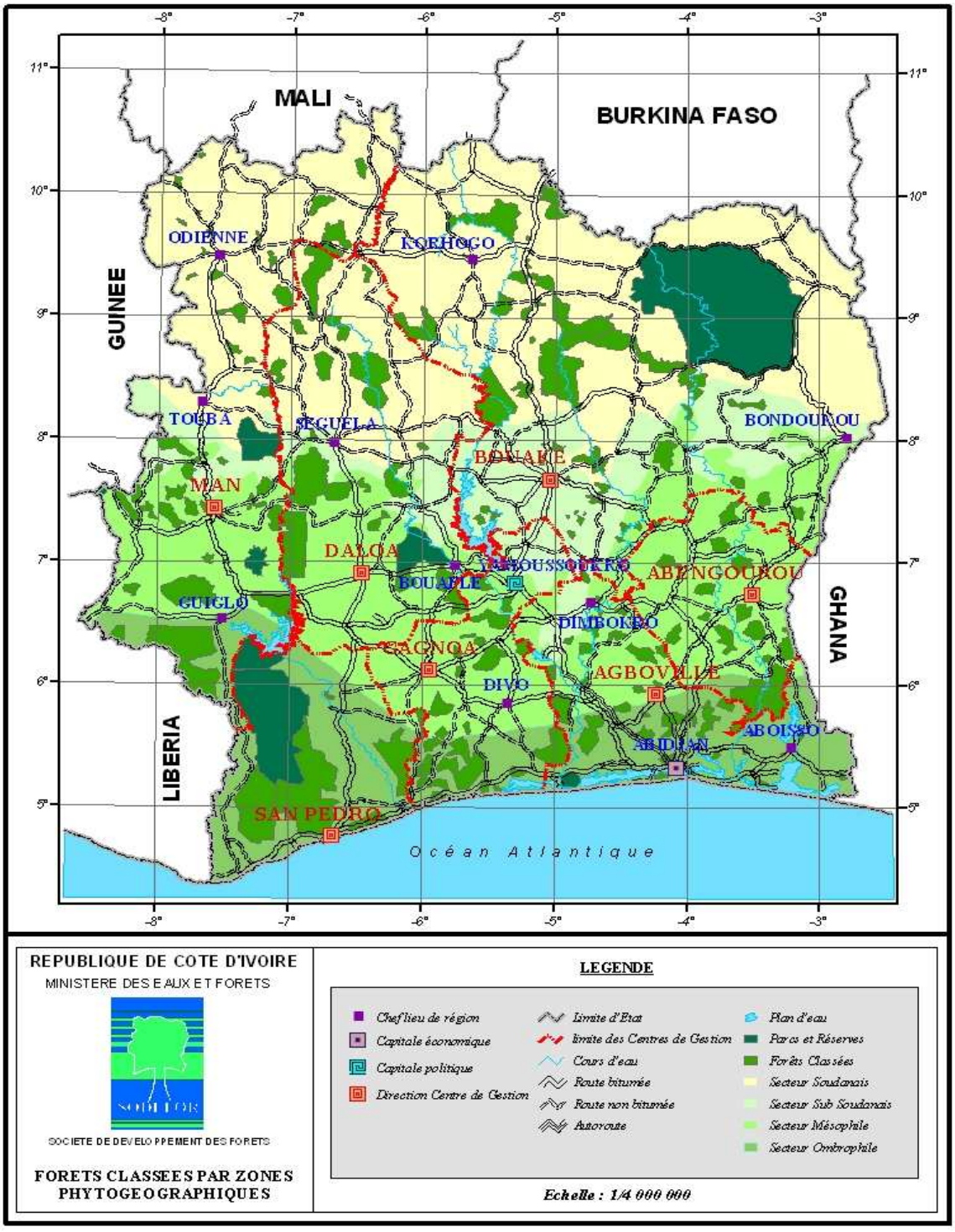
Annex 14 - Administrative Map of Guinea Conakry

Carte Administrative de Guinée Conakry



Annex 15 - Administrative Map of Ivory Coast

Carte administrative et des forêts classées



Source PEP (2007)

Annex 16 - Ivory Coast Production (2004 to 2006)

Statistics from édition des statistiques forestières 2004 2006 DISA/MINEEF

1. Exploitation forestière/ extracted wood in forest and protected forests

Caractéristiques	Valeurs		
	2004	2005	2006
Nombre périmètres en activité	295	302	292
Volume total exploité dans les périmètres (en m^3)	1 447 088,031	1 467 211,572	1 288 567,516
Volume total exploité dans les forêts classées (en m^3)	110 470,100	110 757,248	119 083,954
Volume de teck exporté (m^3)	141 368,369	158 291,494 (*)	99 218,533
Volume Total Exploité (m^3)	**1 698 926,500**	**1 736 260,314**	**1 506 870,003**
Volume moyen exploité par périmètre (en m^3)	5 283,146	4 858,316	4 412,902
Total des taxes d'abattage payées (FCFA)	1 827 159 096	2 077 372 245	1 610 717 622

2. Première transformation/Primary processing

Caractéristiques	Valeurs		
	2004	2005	2006
Stock début (*)	162 034,815	132 078,869	161 383,547
Stock fin période (*)	150 333,392	162 430,496	131 156,697
Nombre total d'usines en activité	89	85	87
Volume total entré en usine	1 829 276,029	1 755 970,713	1 603 817,169
volume total transféré entre usines	224 773,114	172 246,385	165 581,992
Volume total transformé	1 692 631,929	1 553 535,131	1 467 915,067
Volume Sciage	522 628,205	473 263,111	442 251,205
Volume Déroulage	223 944,510	268 121,053	250 635,710
Volume Tranchage	32 508,164	11 101,289	11 031,711
Total des produits issus de la 1ère transformation	**779 080,879**	**752 485,453**	**703 918,626**

3. Deuxième transformation/Secondary processing

Caractéristiques	Valeurs		
	2004	2005	2006
Volume de Contreplaqué	64 938,776	47 105,984	87 706,378
Volume de Moulure	9 997,324	6 752,550	11 170,833
Volume de Parquet	12 302,196	5 935,704	12 354,149
Volume d'Autres transformations	12 246,080	9 366,602	9 154,299
Volume de Frise			12 561,804
Total produits issu de la 2ème transformation	**99 484,376**	**69 160,840**	**132 947,459**

4. Indicateurs de zones d'exploitation forestières

Indicateurs	Valeurs
Nombre de PEF attribués	380
Superficie couverte par les PEF (*)	14 075 229 ha
Nombre de CEF en charge des périmètres	49 sur 56
Nombre de forêts classées	220
Superficie couverte (**)	4 217 736

5. Volumes de 2004 à 2006

Catégorie	Volume 2004 (m^3)	Volume 2005 (m^3)	Volume 2006 (m^3)
Catégorie 1 : BOIS ROUGES	577 657,717	595 852,179	488 055,489
Catégorie 2 : BOIS BLANCS	798 092,260	924 927,776	848 573,236
Catégorie 3 : BOIS DIVERS	71 338,654	57 188,865	71 486,815
TOTAL	**1 447 088,631**	**1 577 968,820**	**1 408 115,540**

6. Synthèse de l'activité forestière par type d'exploitant

Type Exploitant	Année 2004		Année 2005		Année 2006	
	Nb périmètres	Volume exploité (m^3)	Nb périmètres	Volume exploité (m^3)	Nb périmètres	Volume exploité (m^3)
GROUPEMENT	64	314 983,754	59	315 321,292	70	262 191,144
INDUSTRIEL	210	1 089 354,650	227	1 114 175,591	200	987 998,791
STE CIVILE	18	116 497,598	15	113 304,033	22	140 260,213
NON INDIQUE	3	36 722,729	1	35 167,903		17 665,392
TOTAL	**295**	**1 557 558,731**	**302**	**1 577 968,820**	**292**	**1 408 115,540**

7. Synthèse par essence de 2004 2006/Harvested volume/timber species 2004-2006

N° Ordre	Code	Essence	Volume Exploité en mètre cube (m^3)			Moyenne (m^3)
			2004	2005	2006	
01	ES001	ABOUDIKROU	11 318,948	10 779,494	11 133,031	11 077,158
02	ES002	**ACAJOU**	63 341,903	65 554,002	76 455,092	68 450,333
03	ES003	AVODIRE	171,043	233,444	83,154	162,547
04	ES004	BOSSE	4 910,090	4 941,586	4 219,900	4 690,525
05	ES005	**SIPO**	14 685,551	15 258,595	13 286,166	14 410,104
06	ES006	DIBETOU	8 044,614	9 273,844	5 582,806	7 633,755
07	ES007	**IROKO**	197 378,647	187 393,128	136 549,413	173 773,729
08	ES008	MAKORE	9 945,193	8 802,660	7 041,258	8 596,370
09	ES009	**TIAMA**	41 721,780	37 769,975	35 624,487	38 372,081
10	ES010	**NIANGON**	25 055,965	18 326,598	18 954,597	20 779,053
11	ES011	**SAMBA**	224 068,242	263 536,964	213 885,727	233 830,311
12	ES012	BETE	2 164,136	1 397,610	1 253,647	1 605,131
13	ES013	**FRAMIRE**	68 287,733	66 640,813	51 449,559	62 126,035
14	ES014	**LINGUE**	11 782,682	10 748,020	8 970,706	10 500,469
15	ES015	**ILOMBA**	56 349,032	41 363,684	34 362,481	44 025,066
16	ES016	**FRAKE**	74 995,405	75 051,498	76 261,772	75 436,225
17	ES017	ASSAMELA	264,758	477,820	221,702	321,427
18	ES018	ESSESSANG	-	-	10,566	3,522
19	ES019	**FROMAGER**	363 325,356	441 634,040	418 487,698	407 815,698

N° Ordre	Code	Essence	Volume Exploité en mètre cube (m^3)			Moyenne (m^3)
			2004	2005	2006	
20	ES020	**ANIEGRE**	36 867,200	27 826,772	22 778,055	29 157,342
21	ES021	KOSSIPO	5 092,801	5 464,468	4 623,017	5 060,095
22	ES022	AMAZAKOUE	2 451,804	2 060,150	2 343,507	2 285,154
23	ES023	**AKO**	28 148,373	30 364,928	27 208,985	28 574,095
24	ES024	**KOTO**	65 319,089	61 223,653	43 557,650	56 700,131
25	ES025	KOTIBE	17 221,352	20 068,519	18 862,414	18 717,428
26	ES026	**BADI**	28 071,404	19 879,815	25 501,743	24 484,321
27	ES027	**AZOBE**	7 924,785	1 873,181	12 855,918	7 551,295
28	ES028	AKOSSIKA	58,304	28,429	15,852	34,195
29	ES029	BA	-	17,858	21,889	13,249
30	ES030	KEKELE	-	-	14,285	4,762
31	ES031	LOHONFE	3,828	-	18,415	7,414
32	ES032	DIFOU	3 010,268	2 608,748	2 842,959	2 820,658
33	ES033	**DABEMA**	49 589,769	28 356,279	40 557,702	39 501,250
34	ES034	IATANDZA	10 446,799	7 567,042	8 317,160	8 777,000
35	ES035	LOTOFA	4 559,850	3 109,978	2 879,942	3 516,590
36	ES036	MELEGBA (EBIA)	7,283	10,062	4,702	7,349
37	ES037	POCOULI	4 840,331	5 377,267	2 532,719	4 250,106
38	ES038	VAA (LIMBALI)	2 735,676	2 443,235	1 413,727	2 197,546
39	ES039	BI (EYONG)	7 835,591	3 490,646	4 171,271	5 165,836
40	ES040	POUO	3 205,998	2 113,793	3 368,859	2 896,217
41	ES041	MOVINGUI	3 119,315	3 098,952	3 481,073	3 233,113
42	ES042	AIELE	1 386,335	762,323	651,236	933,298
43	ES043	**BAHIA**	39 104,437	38 726,535	22 244,758	33 358,577
44	ES044	EMIEN	134,002	55,581	125,583	105,055
45	ES045	FARO	2 557,851	1 312,863	2 076,905	1 982,540
46	ES046	KONDROTI	5 396,244	2 851,384	2 480,489	3 576,039
47	ES047	TALI	9 777,563	7 027,471	6 706,132	7 837,055
48	ES048	AKATIO	3 055,446	2 884,492	2 820,570	2 920,169
49	ES049	ETIMOE	1 395,757	1 024,827	1 009,422	1 143,335
50	ES050	BODO	493,783	867,057	2 139,107	1 166,649
51	ES051	BROTOU	26,706	-	-	8,902
52	ES052	ZAIZOU (BO)	2 895,115	754,612	1 140,771	1 596,833
53	ES053	ALONE	8,467	-	-	2,822
54	ES054	MEBLO	403,033	22,984	87,651	171,223
55	ES055	AKOUA	222,296	173,626	285,595	227,172
56	ES056	BOIRE	12,500	-	14,479	8,993
57	ES972	BOBORO	-	-	4,870	1,623
58	ES973	ADEMOTEU	-	-	4,897	1,632
59	ES974	ARAMON	-	-	4,504	1,501
60	ES975	GMELINA	-	88,907	-	29,636
61	ES976	EUCALYPTUS	-	2 316,081	-	772,027
62	ES977	PIN	-	1 226,594	-	408,865
63	ES978	GBON	-	-	6,809	2,270
64	ES979	**TECK**	141 368,369	158 350,987	99 228,698	132 982,684
65	ES980	CODADEMA	31,963	-	-	10,654
66	ES981	AWOUNDE	4,948	7,536	-	4,161
67	ES982	KANTOU	45,722	59,493	10,165	38,460
68	ES983	DOBROU	3,041	63,958	-	22,333
69	ES985	PEPE	8,340	32,775	37,534	26,216
70	ES986	KAFROMA	33,740	36,075	-	23,272
71	ES987	DIVERS	815,670	1 656,172	-	823,947
72	ES989	DJUMBO	41,010	4,646	9,379	18,345
73	ES990	AZODO	963,711	268,120	242,084	491,305
74	ES991	**KAPOKIER**	26 496,517	28 378,213	16 259,810	23 711,513
75	ES992	NAGA	740,138	196,989	9,688	315,605
76	ES993	ABALE	2 434,798	58,130	29,632	840,853
77	ES994	SOUGUE	105,637	34,421	4,387	48,148
78	ES995	LATI	626,350	869,658	2 141,242	1 212,417
79	ES997	LOLOTI	16,114	21,475	51,831	29,807
80	ES999	AUTRES	-	-	6 310,403	2 103,468
TOTAL			**1 698 926,500**	**1 736 319,807**	**1 507 344,238**	**1 514 547,497**

8. Classification des essences exploitées de 2004 à 2006

Essence ayant un volume moyen	Nombre d'essences	Volume cumulé	% Effectif	% Volume
Inférieur à 1.000m^3	35	5 922,590	43,75%	0,36%
Entre 1.000 et 10.000m^3	24	93 817,896	30,00%	5,69%
Entre 10.000 et 50.000m^3	13	336 668,457	16,25%	20,43%
Au-delà de 50.000m^3	8	1 211 115,146	10,00%	73,51%
Total	80	1 647 524,089	100,00%	100,00%

Le volume cumulé de 7 essences (9% des essences exploitées) est de 1 078 132,462m^3 et représente plus de 71% des volumes cumulés moyens, de 2004 à 2006.

9. Unités industrielles effectuant du sciage, déroulage et tranchage

Usines ayant pour activité	Année			Moyenne
	2004	2005	2006	
Sciage	91,0%	94,1%	93,0%	92,7%
Déroulage	22,5%	30,6%	30,2%	27,8%
Tranchage	7,9%	30,6%	10,5%	16,3%

L'activé de sciage est de loin la plus importante en nombre d'unités industrielles en activité.

10. Exportations de bois ivoiriens par pays de destination en volume en 2005

Code pays	Libellé	VOLUME (m^3)	Pourcentage
001	France	23 016,699	3,05%
002	BENELUX	7 874,610	1,04%
003	Pays-Bas	6 891,819	0,91%
004	République d'Allemagne	44 050,259	5,84%
005	Italie	146 249,693	19,40%
022	Royaume-Uni	23 209,643	3,08%
026	Irlande	9 820,454	1,30%
028	Norvège	222,459	0,03%
030	Suède	197,191	0,03%
032	Finlande	429,859	0,06%
034	Danemark	381,798	0,05%
036	Suisse	15,582	0,00%
040	Portugal	5 021,651	0,67%
042	Espagne	123 883,018	16,44%
043	Andorre	-	0,00%
046	Malte	814,652	0,11%
050	Grèce	13 897,689	1,84%
052	Turquie	372,226	0,05%
056	République de Russie	39,333	0,01%
060	Pologne	1 468,524	0,19%
066	Roumanie	597,119	0,08%
204	Maroc	6 473,399	0,86%
212	Tunisie	23 414,690	3,11%
216	Lybie	79,159	0,01%
220	République Arabe d'Egypte	4 324,647	0,57%
228	Mauritanie	2 376,225	0,32%
247	République du Cap-Vert	857,297	0,11%
248	Sénégal	66 196,845	8,78%
252	Gambie	-	0,00%
268	Libéria	-	0,00%
276	Ghana	321,258	0,04%
362	Ile Maurice	219,680	0,03%
374	Ile de la Réunion	3 206,865	0,43%
377	Mayotte (iles de)	86,675	0,01%

Code pays	Libellé	VOLUME (m^3)	Pourcentage
390	République d'Afrique du Sud	4 330,419	0,57%
400	Etats Unis d'Amérique	39 292,660	5,21%
404	Canada	1 425,867	0,19%
440	Panama	-	0,00%
450	Indes Occidentales	13 671,594	1,81%
456	République Dominicaine	352,989	0,05%
600	Chypre	1 523,291	0,20%
604	Liban	5 535,862	0,73%
608	Syrie	7 657,114	1,02%
624	Israël	1 548,011	0,21%
628	Jordanie	207,935	0,03%
632	Arabie Saoudite	4 476,800	0,59%
636	Koweït	146,822	0,02%
645	Doubaï	3 124,273	0,41%
646	Abu Dhabi	855,903	0,11%
662	Pakistan	327,239	0,04%
664	Inde	144 337,796	19,15%
680	Thaïlande	239,286	0,03%
700	Indonésie (y compris Timor)	575,282	0,08%
701	Malaisie	254,719	0,03%
720	République Populaire de Chine	1 243,475	0,16%
732	Japon	112,747	0,01%
736	Taiwan	189,988	0,03%
740	Hong-Kong	133,575	0,02%
800	Australie	174,968	0,02%
804	Nouvelle-Zélande	65,575	0,01%
805	Slovénie	-	0,00%
818	Emirats arabes Unis	5 887,697	0,78%
TOTAL		**753 702,905**	

11. Valeur FOB des exportations par pays en 2006

Pays	Volume (m^3)	Pourcentage
ABU DHABI	691,797	0,10%
AFGHANISTAN	24,804	0,00%
AFRIQUE DU SUD	4 126,404	0,60%
ALGERIE	90,012	0,01%
ALLEMAGNE	31 909,646	4,62%
ARABIE SAOUDITE	4 173,841	0,60%
AUSTRALIE	75,734	0,01%
AUTRES PAYS	143,038	0,02%
AUTRICHE	91,378	0,01%
AVITAIL.ETRANG.	-	0,00%
BAHAMAS	113,909	0,02%
BAHREIN	227,861	0,03%
BANGLADESH	701,947	0,10%
BENIN	-	0,00%
BURKINA-FASO	12,650	0,00%
CAMEROUN	-	0,00%
CANADA	1 140,151	0,16%
CAP-VERT	2 177,540	0,32%
CHINE POPULAIRE	8 758,450	1,27%
CHYPRE	680,403	0,10%
CONGO	-	0,00%
COREE DU SUD	-	0,00%
DANEMARK	609,937	0,09%
DOMINIQUE	255,212	0,04%
DOUBAI	9 993,093	1,45%
EGYPTE	1 705,827	0,25%
EMIRATS A.U.	11 505,486	1,66%
ESPAGNE	105 052,206	15,20%
FINLANDE	363,120	0,05%

Pays	Volume (m^3)	Pourcentage
FRANCE	20 037,970	2,90%
GABON	-	0,00%
GAMBIE	354,862	0,05%
GHANA	63,233	0,01%
GRECE	12 147,500	1,76%
GUINEE (REP DE)	-	0,00%
GUINEE BISSAU	109,224	0,02%
GUINEE EQUAT.	-	0,00%
HONG-KONG	161,132	0,02%
INDE	95 471,481	13,81%
INDES OCCIDENT	1 979,016	0,29%
INDONESIE	138,572	0,02%
IRLANDE	8 609,439	1,25%
ISRAEL	1 914,634	0,28%
ITALIE	142 256,313	20,58%
JAPON	385,296	0,06%
JORDANIE	305,228	0,04%
KOWEIT	178,803	0,03%
LIBAN	4 684,478	0,68%
LIBERIA	-	0,00%
LITUANIE	32,670	0,00%
LYBIE	34,548	0,00%
MALAISIE	6 547,682	0,95%
MALI	-	0,00%
MALTE	814,822	0,12%
MAROC	7 692,169	1,11%
MAURICE (ILE)	92,587	0,01%
MAURITANIE	1 888,802	0,27%
MAYOTTE	243,730	0,04%
MEXIQUE	23,680	0,00%
NIGER	-	0,00%
NIGERIA	-	0,00%
NORVEGE	181,591	0,03%
NVLLE CALEDONIE	53,345	0,01%
NVLLE-ZELANDE	-	0,00%
OMAN	49,669	0,01%
PAKISTAN	286,296	0,04%
PAYS-BAS	10 553,198	1,53%
POLOGNE	1 018,262	0,15%
PORTUGAL	3 497,425	0,51%
QATAR	1 810,380	0,26%
REP DOMINICAINE	2 279,061	0,33%
REUNION	2 123,118	0,31%
ROUMANIE	5 253,280	0,76%
ROYAUME-UNI	22 779,983	3,30%
RUSSIE	47,950	0,01%
SENEGAL	65 877,575	9,53%
SIERRA-LEONE	-	0,00%
SLOVENIE	632,671	0,09%
SUEDE	416,092	0,06%
SYRIE	3 745,540	0,54%
TAIWAN	3,170	0,00%
THAILANDE	48,330	0,01%
TOGO	-	0,00%
TUNISIE	24 964,507	3,61%
TURQUIE	1 554,116	0,22%
U.S.A	40 438,210	5,85%
UEBL	10 425,487	1,51%
VIETNAM NORD	91,439	0,01%
VIETNAM SUD	2 136,606	0,31%
YOUGOSLAVIE	101,064	0,01%
TOTAL	**691 160,682**	

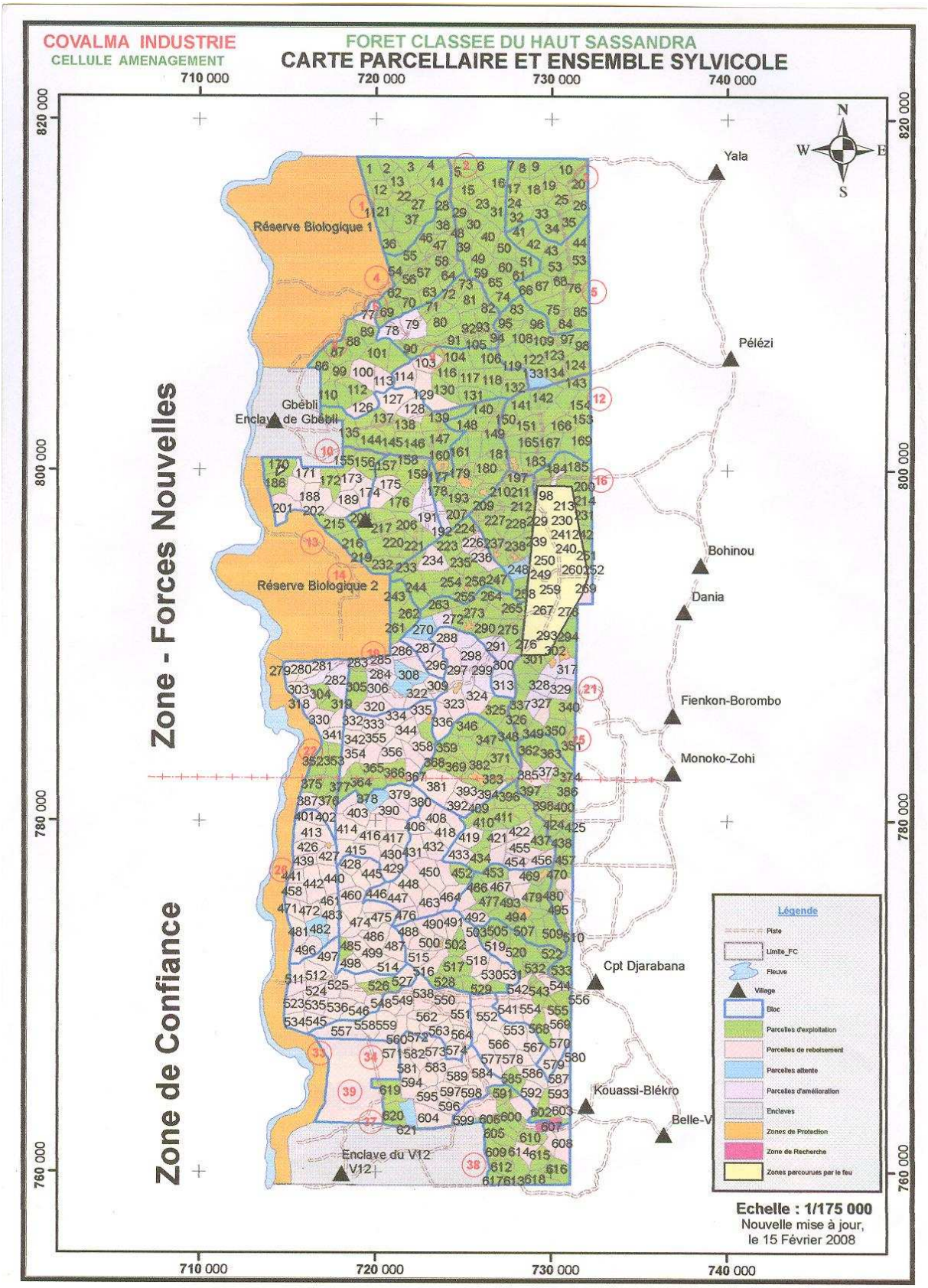
12. Valeurs FOB des exportations par continent de 2003 à 2006

Continent	Valeur Fob 2003	Valeur Fob 2004	Valeur Fob 2005	Valeur Fob 2006
Afrique	23 108 042 681	23 003 123 077	22 216 456 724	22 663 780 245
Amérique	5 083 939 845	10 145 677 457	9 944 225 163	9 789 900 468
Asie	23 799 484 210	27 529 675 350	28 573 428 255	23 519 208 388
Europe	104 369 287 070	121 033 733 034	118 534 300 083	104 619 231 267
Océanie	79 066 727	106 196 424	83 822 844	43 058 202
Non determine	8 262 297	38 189 078	11 664 447	31 090 038
Total	**156 448 082 830**	**181 856 594 420**	**179 363 897 516**	**160 666 268 608**

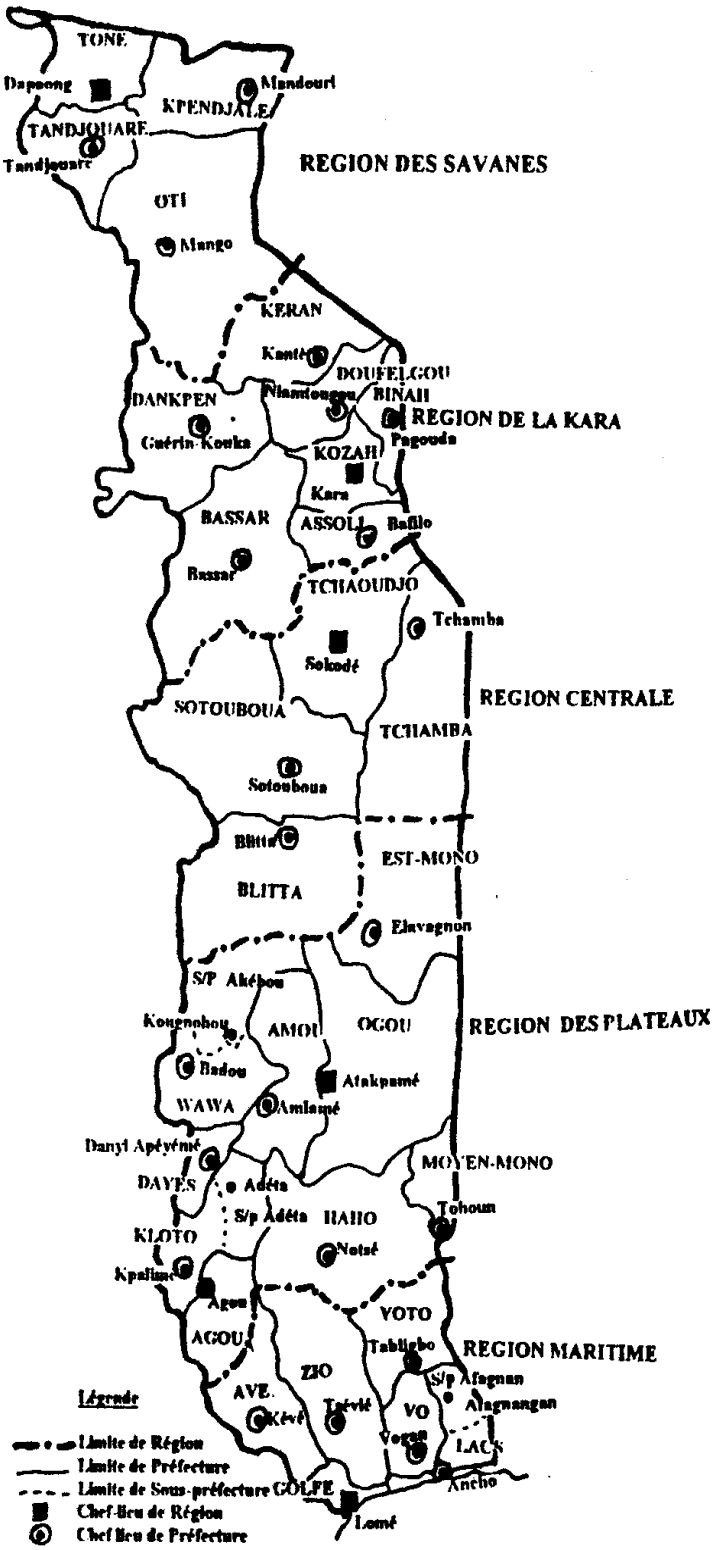
13. Moyenne des valeurs FOB des exportations par continent de 2001 à 2006

Continent	Valeur FOB moyenne	Pourcentage	Rang
Afrique	24 069 722 798	13,58%	3ème
Amérique	7 766 043 012	4,38%	4ème
Asie	25 464 043 355	14,37%	2ème
Europe	119 809 404 931	67,61%	1er
Océanie	77 870 184	0,04%	5ème
Non déterminé	17 926 541	0,01%	6ème
Moyenne générale	177 205 010 821		

Annex 17 - Management Plan of Haut Sassandra



Annex 18 - Administrative Map of Togo



Carte 1 : Subdivision administratives du Togo (ORSTOM 1991, modifié)

Annex 19 - Timber & Fuelwood Consumption in Togo

1. Evolution de la demande en bois d'œuvre au TOGO

Années	1960	1970	1983	1990	1995	2000	2010	2020
Production de Sciages et grumes (x 1000m^3)	97,50	137,00	-	-	55,00	55,00	60,00	60,00
Consommation sciage et grumes (x 1000m^3)	-	-	23,00	33,00	48,00	53,00	90,00	125,00
Importation sciage et grumes (x 1000m^3)	4,90	5,00	10,00	6,00	22,00	26,00	56,00	100,00
Valeur des importations (en millions de $/EU)	-	-	2,50	3,60	7,80	8,60	11,00	13,50

Source: N'DJODO (1995) PROJET ODEF, OIBT, Haho-Baloé

2. Consommation finale par tête d'habitants de combustible ligneux

Région	Bois de chauffe (kg/an)	Charbon de bois (kg/an)
R. Maritime	201	79
R. Plateaux	446	64
R. Centrale	274	43
R. de Kara	390	20
R. Savanes	628	23
Total Togo	**347**	**69**

Source: Thiam, 1991

8. Evolution de la demande de combustibles ligneux par an

Année	Charbon de bois (tonnes)	Bois de chauffe (tonnes)	Equivalent demande totale en bois rond (tonnes)	Potentiel existant (tonnes)
1995	71..550	1.561.500	1.800.000	6.200.634
2000	271.700	1.616.200	2.521.867	5.300.634
2020	476.700	2.863.900	4.452.900	2.569.000

Source : Etude SOTED – RPTES, 2001 complétée