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PRELIMINARY REPORT ON THE AFRICAN TIMBER TRENDS STUDY

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Note on the Preliminary Report of the African Timber Trends Study (Western Africa and Equatorial East Africa)

The African Timber Trends Study was initiated in 1959 at the 8th Session of the Food and Agriculture Organization of the UN (FAO) and endorsed at the Second Session of the Commission in 1960. It has been conducted jointly by the Secretariat and FAO through a series of consultants working in cooperation with government forestry departments. A preliminary report covering Western Africa and Equatorial East Africa is available as an Information Paper. It is expected that the final report covering the whole region will be completed in 1964.

The report deals with timber trends and prospects in 22 countries of Western Africa (17 countries of the West Coast, from Mauritania in the north to Congo Leopoldville in the south, plus Mali, Upper Volta, Niger, Chad and the Central African Republic), and three countries of Equatorial East Africa (Kenya, Uganda and Tanganyika), with special reference to existing forest resources and timber industries, present and future consumption of wood products, and the trade in wood. Consumption of the several wood products is examined, by end uses wherever possible, and tentative forecasts are made of prospective requirements in the year 1975. Western Africa has been given priority in the African Timber Trends Study, since it contains the greater part of the natural forest wealth of Africa; this is the sub-region where the timber industry of the continent is centred. The three countries of Equatorial East Africa, where detailed surveys were made by FAO of consumption of wood products, are included in the preliminary report. The methods used and the experience gained in these surveys provides guidance for similar work that, sooner or later will have to be undertaken in many areas within the African region.

Western Africa

Nine of the countries of Western Africa are traditional exporters of wood; two countries (Liberia and the Central African Republic) possess forest resources that should enable them to become major exporters before long; the remaining eleven countries are poorly endowed with forests, and are likely to remain net importers of wood products in the foreseeable future. At best, one or two of these countries might attain a certain degree of self-sufficiency.

Present per caput consumption of simple wood products, such as building poles and fuelwood, is fairly high throughout the area, and is likely to remain on a similar level, or to decline slightly, in the period to 1975. Consumption of manufactured wood products, including sawnwood, wood-based panel products (plywood, fibreboard and particle board), and pulp products, while generally low per head of the population, is already substantial in the aggregate, and is expected to increase considerably by 1975; sawnwood consumption in the 22 countries, at present totalling about 1.1 million m3, is estimated at 1.8 to 1.9 million m3 for 1975; the consumption of plywood and veneer, at present about 35,000 m3, will rise to an estimated 90,000 m3, while that of fibreboard and particle board (currently about 18,000 tons) will probably increase at an even faster rate; the consumption of pulp products is expected to rise by 1975 from the present level of about 80,000 tons, to an estimated 230,000 to 250,000 tons.

In terms of volume of wood raw material, sawnwood is by far the most important of the manufactured wood products that compose present and projected consumption. The available information on forest resources in the subregion, including recent data from prospections in its equatorial part, suggest that the forest resource is fully adequate to meet most requirements in sawnwood and panel products within the subregion during the period under consideration (to 1975), while permitting the maintenance of exports of wood at a level that need not be less, in terms of the volume of raw material involved, than that attained in 1961, when exports were at their highest. Under certain conditions, this level might be even surpassed. However, significant changes are likely to occur in the share in total trade of the several exporting countries. Also, exports of manufactured wood products are almost certain to gain in importance compared with those of logs.

The utilization of the available timber resources involves infrastructural investments on a major scale. Increased distances of transport, among other factors, will tend to raise gradually the cost of the logs. However, there is considerable scope for counteracting, and in many cases for more than offsetting, this additional cost, as far as the ultimate consumers of the wood products in the producing and the importing countries are concerned. This will depend to a great extent on the development of efficient manufacture, particularly of sawnwood and veneers, in appropriate locations of the subregion. Appreciable investments will be needed to attain the necessary capacity of output, while at the same time replacing that of certain existing manufacturing units that are inefficient. Considerable development of manufacture based on wood is desirable, not only in order to increase the export earnings, per unit of raw material, of the producing countries but, what is much more important, in order that wood products be supplied to consumers at reasonable prices, be it in the producing countries, in the African importing countries that will depend to a growing extent on West-African wood, or in the importing countries of Europe. In the latter in particular, costs must be kept down if African woods are to remain competitive. The development of domestic consumption, notably of sawnwood, in the sub-region and throughout Africa, should facilitate exports of manufactured wood products to the traditional markets in Europe; eventually it might help also to reduce the cost of the wood of certain secondary species, at present in limited demand, to a level where major shipments to overseas markets will become possible.

Much of the above industrialization might be accomplished through cooperation with European firms that at present import African logs.

With rising sub-regional demand for panel products, production of plywood is likely to be installed or expanded, as the case may be, in several of the surplus countries, while particle-board manufacture may help to solve problems of supplies in some of the deficiency areas. Pulp products, already by far the biggest item of the West-African import bill for wood products, will become a growing burden on foreign exchange, yet with the exception of Nigeria and possibly one or two other countries, the domestic demand in the individual countries and within existing areas of customs unions, will be hardly sufficient to warrant local production of pulp. However, such production might be possible in certain favourable localities, given a captive overseas market. The question of pulp manufacture apart, many of the countries of Western Africa could effect very substantial import savings through secondary manufacture of pulp products, often on a modest scale, based on imported paper and paperboard.

Beside the investments in infra-structure and in industry that will be needed to maintain and to develop production, the forestry and wood sector of Western Africa will not be able to make its due contribution to general welfare, unless the forest services in the several countries are staffed adequately and are provided with sufficient funds to carry out their functions, including the administration of forests, silvicultural work on an appropriate scale, surveys of forest resources, research, and so on. Moreover, throughout the region there is an urgent need to halt the destruction of forests, which is due to shifting cultivation and fire, among other causes. The drain due to shifting cultivation is likely to become much more severe in the near future, as the effects of population growth gather momentum and many additional cultivators attack the forests. Such destruction can be halted only by applying appropriate policies of land-use. This is essential, not only to preserve the wood resource, but also in order to prevent the disappearance of the protective effects of the forest, with consequent damage to the water regime and the fertility of soils in many important rural areas of Western Africa.

Equatorial East Africa

In Equatorial East Africa, sawnwood consumption in 1959-61 was approaching 300,000 m3; that of plywood was about 8,000 m3, and the combined consumption of fibreboard, building board and particle board about 6,000 tons; the consumption of pulp products had passed the 25,000-ton mark. By 1975 requirements for these products are expected to be at two to two and a half times these levels.

There are good prospects for the area attaining approximate self-sufficiency in forest products; feasibility studies with a view to pulp and paper manufacture are currently in progress.