

*Forestry in Guyana
Market Report
2002*



*Guyana Forestry Commission
February 2003.*

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1.

2.

1. SUMMARY

This 2002 edition of the Forestry in Guyana Market Report series provides information on domestic and export trends of forest based products, royalties assessed and average prices for various forest products. Data are recorded for a four-year period: 1999 through 2002.

Production

(Aggregate) production of traditional products; logs, chainsawn lumber, splitwood, and roundwood, (*see glossary*) declined by 5 (rounded) percent in 2002 relative to 2001. Production of other forest products; charcoal and firewood, increased in 2002 by 75 and 331 percent respectively. With the exception of mangrove bark, there was a considerable improvement in the production of non-timber forest products (NTFPs) in 2002, when compared with production levels in 2001.

Royalties

Royalties assessed in 2002 charted an improvement of 7 percent relative to 2001. Logs and chainsawn lumber (aggregate of 84 percent of total royalty assessed) were the main contributing products to the relative improvement.

Exports

Improvement in the exportation of forest products was also achieved in 2002 with increases of 8 and 5 percent respectively in volume and monetary value, relative to 2001. Logs and lumber were the main contributors to that improvement. Logs exported increased from 32,753 m³ in 2001 to 47,847 m³ in 2002: a variance of 36 percent.

Prices

Domestic prices remained constant over the past four years (1999 – 2002). Export prices for logs improved by 28 percent in 2002 relative to 2001, and 47 percent in 2002 relative to 2000. Export prices for lumber declined by 19 percent in 2002 relative to 2001 and 5 percent in 2002 relative to 2000.

GLOSSARY OF TERMS

Dressed Lumber	Wood sawn lengthways from logs, further processed by planing, etc.
Firewood	Includes parts of trees made up into bundles or loads, or cut in a manner in which it is usual to cut wood for burning, and all refuse wood generally, but does not include straight logs or poles of any kind.
Fuelwood	Wood in the rough, from trunks and branches of trees, to be used as fuel for purposes such as cooking, heating and power production. Categorises fuelwood converted to charcoal.
Non-timber forest products	All biological material, other than industrial roundwood, that may be extracted from natural ecosystems, either for commercial purposes, for use within the household or for social, cultural or religious purposes. Also known as non-wood forest products.
Piles	Long straight logs usually destined to be driven into the ground by impact.
Poles	Straight pieces of 5m. or more in length taken from tree trunks. They are used principally to support telephone, telegraph and electrical transmission lines.
Posts	Round, hewn, squared or split wood, usually less than 3m. in length, but possibly up to 5m., used for fencing, guard rails and the like.
Round Logs	Bole or a large branch of a felled tree.
Roundwood	Wood in its natural state as felled or otherwise harvested, with or without bark, round, split, roughly squared or in other forms. Roundwood includes spars, posts, poles (wallaba) and piles (greenheart, kakaralli and mora).
Sawnwood	Categorises dressed lumber, undressed lumber, sleepers and pallets.
Shingles	Squares or wooden tiles usually of Wallaba (<i>Eperua grandiflora</i>) wood used to construct roofs and for panelling purposes.
Splitwood	Comprises paling and vat staves and shingles.
Timber	Defined in the Forest Act as a tree or any ligneous part of a tree whether standing, fallen or felled, and all wood, whether or not sawn, split, hewn or otherwise cut up or fashioned.
Undressed Lumber	Wood in the rough sawn lengthways from logs and not processed any further.
Wattles	Saplings less than 8 cm in diameter.

CONVERSIONS

From		Multiply By	To Obtain	
1	<i>Cubic foot</i> ft^3	0.02831685	<i>Cubic metre</i>	m^3
2	<i>Cubic foot</i> ft^3	0.036	<i>Cubic metre</i>	m^3 (hoppus)
3	<i>Foot / Linear Foot</i> $\text{ft} / \text{lin. ft.}$	0.3048	<i>metre</i>	m
4	<i>Board foot</i> fbm.	0.002358	<i>Cubic metre</i>	cm^3
5	<i>Cord</i> cd.	3.6247	<i>Cubic metre</i>	m^3
6	<i>Pound</i> lb.	0.453592	<i>Kilogram</i>	kg.

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2. INTRODUCTION

Production and trade of forest products in 2002 showed mixed signs. Relative to 2001, production of logs declined while exports increased; production of splitwood increased while exports decreased; production and exportation of chainsawn lumber, fuelwood and maicole palm increased; production and exports of plywood declined.

In comparison with forecasts for 2002, production of logs, roundwood and splitwood fell short of targets by 24, 1 and 3 percent respectively (*see Table 1*). Conversely, production of manicole palm and chainsawn lumber exceeded targets by 145 and 3 percent respectively.

The trend of staggered movement in the domestic market for the past three years continued throughout 2002. Substitute building materials; cement, steel, and imported wooden and glass furniture remained the products against which locally-manufactured lumber and furniture competed. The export market remained the target market for most producers.

In the furniture trade, exports exceeded imports by 277 percent (Exports: US\$2,443,368.49¹, Imports: US\$647,159.77²). The domestic furniture market continued to be competitive. Currently, this sector is being guided by a Code for the Manufacture of Furniture developed by the Guyana National Bureau of Standards. Hopefully the quality of furniture on the local market will be enhanced and the gap between exports and imports widen.

¹ Source: Guyana Forestry Commission.

² Source: Bureau of Statistics.

Table 1: Production of Forest Products 1999-2002

Products	Units	1999	2000	2001	2002 forecast	2002 actual	% Change 2001-2002
TIMBER PRODUCTS							
<i>Logs</i>							
Special Class	m ³	111,770	79,511	103,971		133,325	28
Class 1	m ³	104,436	68,664	56,420		53,508	(5)
Class 2	m ³	182,140	99,905	123,384		92,895	24)
Class 3	m ³	37,020	40,454	28,184		17,819	(37)
Total Logs	m³	435,365	288,534	311,959	396,000	297,547	(5)
<i>Chainsawn Lumber (CL)</i>							
Special Class	m ³	4,954	5,676	6,505		6778	4
Class 1	m ³	13,641	15,082	15,915		17900	12
Class 2	m ³	3,814	2,720	4,572		4384	(4)
Class 3	m ³	2,668	5,296	2,515		1937	(23)
Total CL	m³	25,078	28,774	29,507	30,000	30,999	5
<i>Roundwood (RW)</i>							
Greenheart Piles	m ³	9,515	7,262	5,767		9,087	58
Kakaralli Piles	m ³	418	810	935		480	(49)
Mora Piles	m ³	55	88	121		78	(35)
Purpleheart Piles	m ³	18	41	0		0	
Wallaba Poles	m ³	5,693	8,002	3,207		3158	(2)
Posts	m ³	9,694	10,693	9,228		1757	(81)
Spars	m ³	2,044	4,180	39		8	(79)
Total RW	m³	27,437	31,076	19,297	14,776	14,568	(25)
<i>Splitwood (SW)</i>							
Paling Staves	m ³	1,085	1,010	1,013		1154	14
Vat Staves	m ³	4	0	0		0	0
Shingles	m ³	94	27	58		77	33
Total SW	m³	1,183	1,037	1,071	1,269	1,231	15
<i>Fuelwood</i>							
Charcoal	kg	165,465	472,122	521,903		914,951	75
Firewood	cord	3,757	5,886	3,103		13,402	332
Plywood	m ³	86599	91,864	69,137		51,280	(26)
NON-TIMBER FOREST PRODUCT							
Wattles	piece	4,885	35,438	62,246		82,372	32
Mangrove Bark	kg	65,648	30,091	21,090		4,354	(79)
Manicole Palm	stem	5,148,301	3,571,161	3,929,136	3,000,000	7,366,533	87
Processed Manicole Palm (Heart of Palm)	cartons	34,729	97,288	132,974		...	

Source: Guyana Forestry Commission, Bureau of Statistics

Notes:

data for sawmilled lumber is currently unavailable

... data unavailable

3. DOMESTIC PRODUCTION

3.1 Timber Products

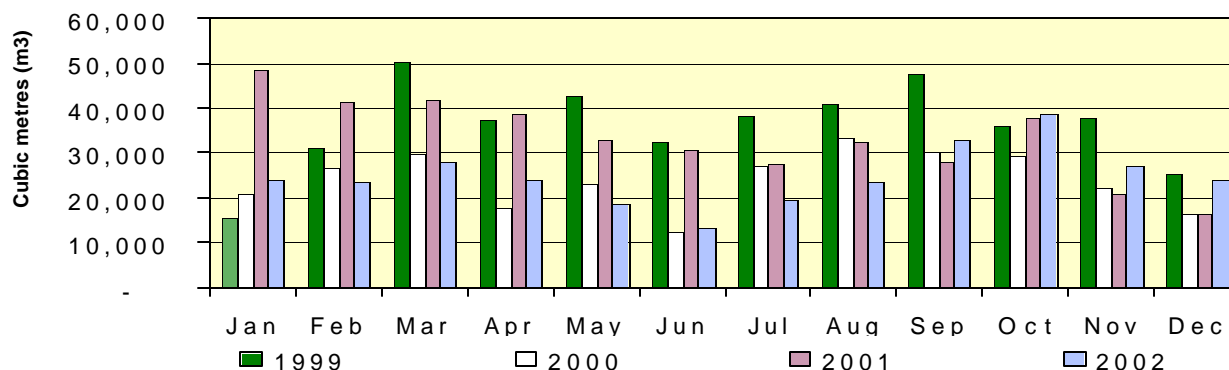
3.1.1 Logs

Production of logs in 2002 fell by 5 percent, in comparison with the level in 2001. That decline was manifest in *classes 1, 2 and 3* of logs. (See p. 13) However, production of *special category* logs charted an increase of 28 percent in the reporting year, relative to 2001. That occurrence indicates a disproportionate dependence on four species. (See p.13)

The data suggest that a possible consideration for the reduced production of logs in 2002 (logs exported increased) was reduced processing in Guyana. Further, some producers experienced the constraints of breakage in equipment and relatively longer traveling distances to access suitable trees. Those were the main reasons for (individual) declines in log production.

Interestingly, the monthly trend in production in 2002 was in contrast to the trend in 2001. (See Figure 1)

Figure 1: Log Production: 1999 – 2002

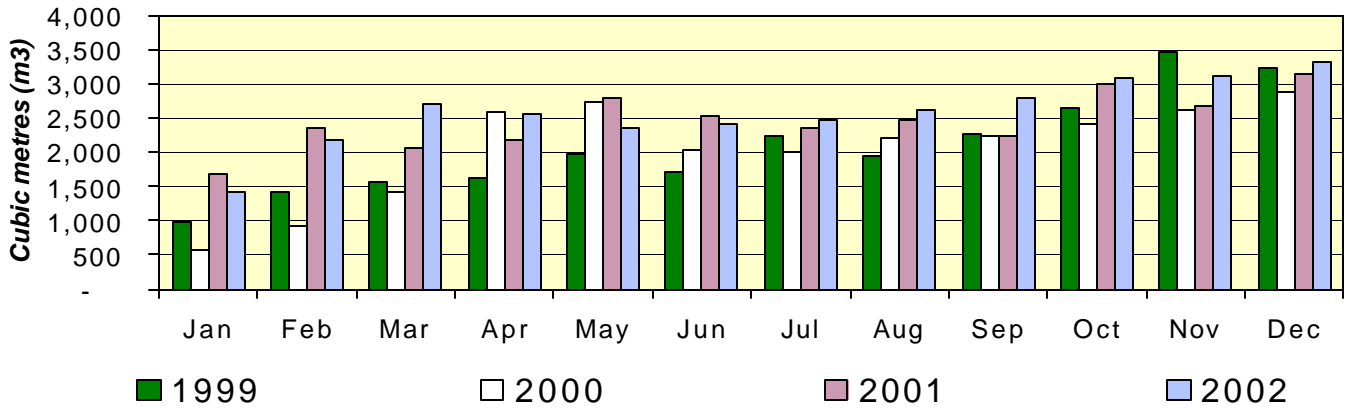


3.1.2 Chainsawn Lumber

Production of chainsawn lumber continued a trend of increase started since 1999 (see Figure 2). In the reporting period there was a 5 percent increase relative to 2001. The production trend for chainsawn lumber remained fairly constant throughout 2002.

Ituni Small Loggers Association, which relies on lumber production through the use of chainsaw, reported³ a productive year in 2002. Among some of the constraints faced in 2002, however, were litigation and limited access to certain areas in its concession as result of limited roads. It was also mentioned that prices had to be lowered to attract sales.

Figure 2: Chainsawn Lumber: 1999 - 2002

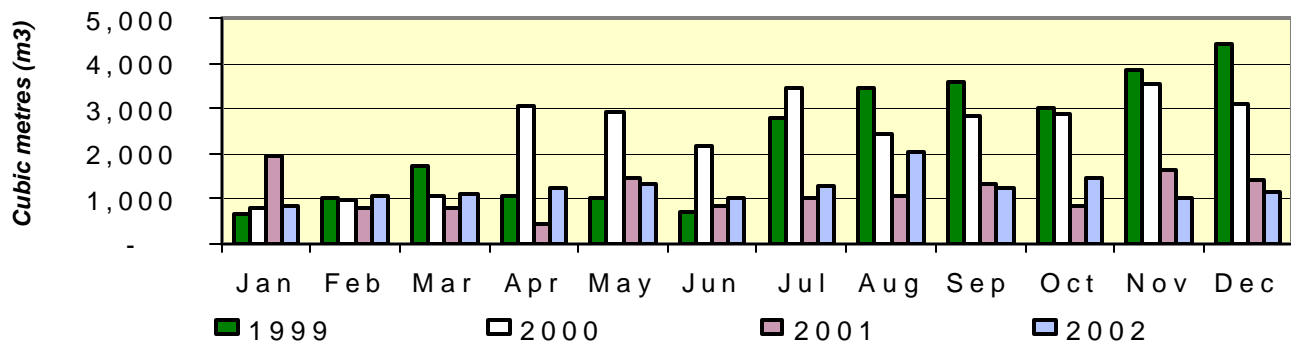


3.1.3 Roundwood

Production of roundwood continued a trend of decline in 2002. In 2002 overall production (of roundwood) fell by 24 percent relative to the 2001 production figure. That decline was approximately 50 percent below roundwood production levels in 1999 and 2000. Notwithstanding that, there was a notable improvement in the production of greenheart piles in 2002 relative to the 2001 figure (i.e. a 57 percent improvement).

(Monthly) Roundwood production remained fairly constant throughout 2002. August was the most productive month. (See Figure 3)

Figure 3: Roundwood Production: 1999 - 2001



3.1.4 Splitwood

Production of splitwood increased by 14 percent in 2002 in comparison with 2001.

Production of paling staves in 2002 increased by 14 when compared with the 2001 production figure. Total production of paling staves for the year 2002 was 1,154 m³ and was 1,013 m³ in 2001.

In spite of the establishment of a new shingle mill in Guyana in 2002, production of shingles failed to increase significantly. Nevertheless, satisfactory progress was realised as production of shingles increased by 33 percent in 2002 from the previous year.

3.1.5 Fuelwood

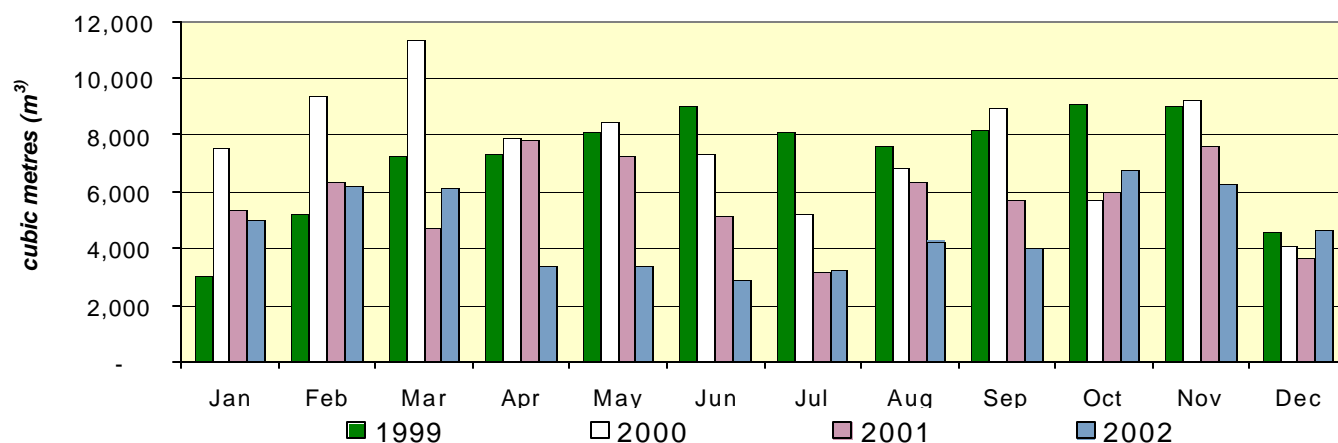
Production of fuelwood was significantly improved in 2002 from 2001. A trend of increase was noted in the production of charcoal in recent years. Production had significantly increased in 2002, by 75 percent, from 521,903 kg in 2001.

Production of firewood amounted to 13,402 cords in 2002. That was a 331 percent increase from 2001.

3.1.6 Plywood

The quantity of plywood produced in 2002 was approximately 26 percent lower than the production level in 2001. Months of significant production in 2002 were February, March, October and November. (See Figure 4)

Figure 4: Plywood Production: 1999 – 2001



3.2 Non-timber Forest Products

3.2.1 Wattle

Production of wattles was 32 percent above the 2001 level in 2002.

3.2.2 Mangrove Bark

Production of Mangrove bark continued its slide in 2002 with a recorded decline of 79 percent, when compared with levels in 2001. Results of investigations into this trend have shown that substitute products have infiltrated markets and posed severe competition to the tanning industry in 2002.

3.2.3 Manicole Palm

Production of manicole palm increased by 87 percent in 2002 when compared with 2001.

4. ROYALTY ON PRODUCTION

Royalty is a charge levied, by the Government of Guyana, on the production of forest produce. Charges vary according to the classification of the logs and the type of products harvested. Therefore, an increase (total) in royalties collected would not necessarily mean an increase in forest extraction but could sometimes be an increase in extraction of certain types of products.

The months of September and October recorded the highest revenue collected in 2002. June and July recorded the lowest revenue collected in 2002. (See Figure 6)

Figure 5: Royalty on Production: 1999 – 2001

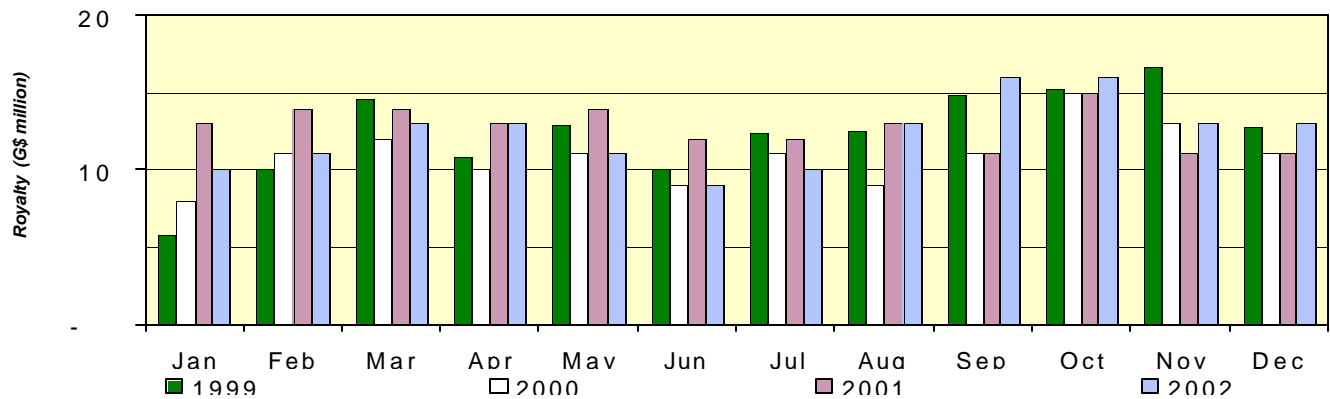


Table 2: Breakdown of Royalty on Production: 1999-2002 (G\$ '000)

PRODUCTS	1999	2000	2001	2002	Percent Change 2001 - 2002
TIMBER PRODUCTS					
Logs					
Greenheart	25,681	22,234	34,388	37,764	10
Special Class	16,592	15,433	11,710	14,089	20
Class 1	18,068	19,535	10,229	11,892	16
Class 2	17,352	15,380	15,709	12,903	(17)
Class 3	2,597	3,318	2350	1,485	(37)
<i>Total Logs</i>	93,007	75,900	74385	78,133	5
Chainsawn Lumber (CL)					
Greenheart	7,012	8,317	12,073	12,060	(.1)
Special Class	2,153	6,245	4,039	4,728	17
Class 1	16,107	22,522	22,543	25,354	12
Class 2	2,968	4,244	4,052	3,885	(4)
Class 3	1,214	1,596	1,334	1027	(23)
<i>Total CL</i>	36,933	42,923	44,041	47,054	7
Roundwood					
Greenheart Piles	10,063	7,465	7,010	11,473	64
Kakaralli Piles	171	190			
Mora Piles	66	0	304	155	(49)
Wallaba Poles	1,846	1,812			
Posts	506	368	40	26	(35)
Spars	125	176	3,125	3,084	(1)
<i>Total Roundwood</i>	12,778	10,020	396	310	(22)
Splitwood					
Paling Staves	462	444	429	238	(44)
Vat Staves	4	0	0	0	
Shingles	83	28	51	68	33
<i>Total Splitwood</i>	548	473	480	306	(36)
Fuelwood					
Charcoal	420	940	690	423	(39)
Firewood	301	319	341	407	19
NON-TIMBER FOREST PRODUCTS					
Wattles	32	113	187	247	32
Mangrove Bark	88	26	23	5	(78)
Manicole Palm	4,538	3,594	3,929	5011	28
TOTAL ROYALTY	148,634	134,411	135,093	146,662	9

Source: Guyana Forestry Commission.

Table 2 above reflects royalty payable to the Guyana Forestry Commission. Logs and chainsawn lumber continued, in 2002, to represent the highest earning categories (as they were the most produced traditional products). Combined earnings (through royalties) of the two products (logs and chainsawn lumber) were 85 percent of the total amount of royalty payable in 2002.

5. EXPORTS

5.1 Export: Volume of forest products

Guyana's cumulative contribution of traditional forest products (logs, sawnwood, roundwood, splitwood and plywood) on the export market was improved by 8 percent in 2002 from 2001. The individual picture associated with each category of products was however mixed. Exports of logs and sawnwood increased by 36 and 74 percent respectively, while exports of splitwood and plywood declined by 21 and 33 percent respectively. (See Table 3)

The outflow of forest products in 2002 continued to be concentrated to specific regions: the majority of logs exported were destined for Asia; the majority of sawnwood went to the Caribbean; the majority of roundwood exported went to North America; the majority of splitwood and plywood went to Caribbean and North America.

Table 3: Export Volume of Forest Products: 1999-2002

Products		1999	2000	2001	2002	% Change (2001-2002)
LOGS	m ³	47,597	44,297	35,138	47,874	36
<i>Sawnwood</i>	m ³	21,719	18,809	18,770	32,753	74
<i>Roundwood</i>	m ³	6,166	3,413	...	6,353	
<i>Splitwood</i>	m ³	579	...	906	719	(21)
<i>Plywood</i>	m ³	76,324	87,030	69,894	46,810	(33)
Total Exports		152,358	153,549	124,708	134,509	8

Source: Guyana Forestry Commission

Note: ...data unavailable

5.2 Export: Value of forest products

Guyana earned 5 percent more in 2002, when compared with earnings in 2001, on (selected) forest products (see Table 4). The value of logs and sawnwood exported was significantly higher in 2002 by 44 and 41 percent respectively, relative to 2001. The value of splitwood increased by 28 percent in 2002, even though the volume exported for the same period was 21 percent lower in 2001.

Plywood, sawnwood and logs continued in 2002 to be the main foreign currency earners for the forest sector. Total combined revenue earned from the three products was 94 percent of the overall export earnings from forest products exported in 2002, even though there is evidence that other products are

gaining prominence as significant foreign exchange earners. That trend was evident since the previous years 1999-2001: total combined revenue earned from the exportation of the three products in 1999 was 96 percent, 98 percent in 2000 and 99 percent in 2001.

Table 4: F.O.B. Export Value of Forest Products 1999-2002 ('000 US\$ at current prices)

Products	1999	2000	2001	2002	% Change (2001-2002)
<i>Logs</i>	3,056	2,768	3,174	4,578	44
<i>Sawnwood</i>	6,670	6,190	7,591	10,717	41
<i>Roundwood</i>	1,029	704	...	1,105	
<i>Splitwood</i>	290	...	285	365	28
<i>Plywood</i>	21,670	23,605	16,691	12,271	(26)
Total Exports	32,715	33,267	27,741	29,047	5

Source: Guyana Forestry Commission

Note: ... data unavailable

6. PRICES⁴

6.1 Export prices

As depicted in Table 5, export prices, in US dollars, for Guyana's logs recovered in 2002 by 23 percent, from an average of US\$77 per cubic metre to an average of US\$95 per cubic metre. Prices rose to a high of 61 percent in April above the January 1997 level. (See Figure 7) In that same period tropical logs were traded on the world market at prices ranging from US\$145-US\$160 per cubic metre (ITTO Market Report, 2002), a 59 percent average above the average price local exporters had accepted in the reporting year.

Average export prices for sawnwood fell by 16 percent in 2002 relative to 2001 and by 5 percent relative to 2000. Prices remained below the January 1997 level. (See Figure 7) On the world market sawnwood was traded at prices ranging from US\$125 (pine) and US\$420 (Jatoba/Crabwood).

Recovery in f.o.b. prices of plywood in 2001 was not witnessed in 2002. Prices (plywood) in 2002 were generally below that of the previous year and fell by as low as 37 percent below the January 1997 price.

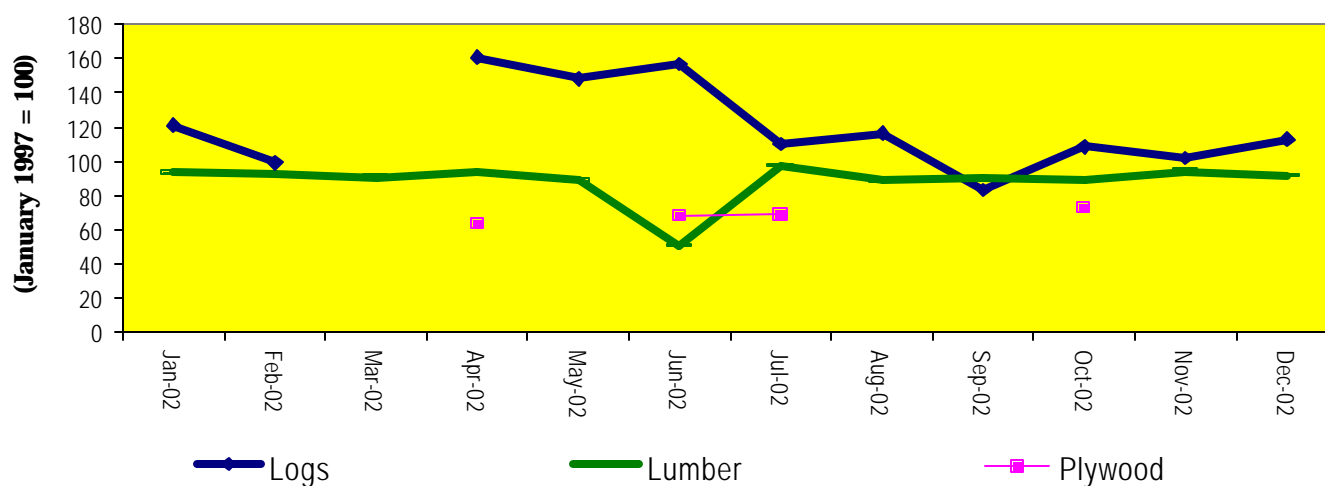
⁴ Prices reflected in this report are merely averages of prices traders have obtained, and do not necessarily reflect the Guyana Forestry Commission's position on prices.

Table 5: Average export prices US\$ / m³, 2000-2002

Products		2000	2001	2002	% change (2001-2002)
Logs	m ³	65	77	95	23
Sawnwood	m ³	345	391	327	(16)
Dressed Lumber	m ³	...	...	367	
Undressed Lumber	m ³	...	...	304	
Plywood	m ³	...	...	262	
Piles	m ³	...	...	165	
Poles	m ³	...	...	184	
Posts	m ³	...	...	208	
Shingles	m ³	...	...	515	

Source: Guyana Forestry Commission
 Note: ... data are not available

Figure 7: Average F.O.B. Prices for Selected Products



Source: Guyana Forestry Commission

6.2 Domestic Prices

Forest products were traded on the domestic (Guyana) market at depressed prices in 2002. Generally, trading prices for logs and sawnwood were fairly stable in recent years (2000-2002) (See Table 6).

Table 6: Average domestic prices US\$ / m3, 2000-2002

Products		2000	2001	2002	% change (2001-2002)
<i>Logs</i>	<i>m³</i>	65	67	67	0
<i>Sawnwood</i>	<i>m³</i>	256	260	257	(1)
<i>Piles</i>	<i>piece</i>	...	...	2	
<i>Posts (wallaba)</i>	<i>piece</i>	...	...	3	
<i>Shingles</i>	<i>bundle</i>	...	...	8	

Source: Guyana Forestry Commission

Note: ... data are not available

APPENDIX 1

Table 7: Exchange Rates of Guyana Dollar to US dollar

1999	G\$178.60=US\$1
2000	G\$181.51=US\$1
2001	G\$187.34=US\$1
2002	G\$190.00=US\$1

Source: Bureau of Statistics

APPENDIX 2

CLASSIFICATION OF TIMBERS 1996

Ref: First Schedule, Forest Act. Amendments, 1996

Classification	Species (Local Names)	Species (Scientific Names)
Special Category	Greenheart Purpleheart Brown Silverballi Red Cedar Letterwood Bulletwood	<i>Chlorocardium rodiei</i> <i>Peltogyne venosa</i> <i>Licaria cannella</i> <i>Cedrela odorata</i> <i>Brosimum guianense</i> <i>Manilkara bidentata</i>
Class 1	Crabwood Yellow Silverballi Itikiboraballi Locust Tatabu Determa Wamara Kabukalli Shibadan Tauroniro Manniballi Washiba Hakia Dalli Suya Ulu Simarupa Aromata Mora Morabukea Hububalli	<i>Carapa guianensis</i> <i>Aniba hypoglauca</i> <i>Swartzia xanthopetala</i> <i>Hymenaea courbaril</i> <i>Diptotropis purpurea</i> <i>Ocotea rubra</i> <i>Swartzia leiocalycina</i> <i>Goupia glabra</i> <i>Aspidosperma album</i> <i>Humiria balsamifera</i> var <i>balsamifera</i> <i>Moronobea coccinea</i> <i>Tabebuia</i> sp. <i>Tabebuia serratifolia</i> <i>Virola</i> spp. <i>Pouteria speciosa</i> <i>Trattinickia rhoifolia</i> <i>Quassia simarouba</i> <i>Clathrotropis branchyptala</i> <i>Mora excelsa</i> <i>Mora gonggrijpii</i> <i>Loxopterygium sagotii</i>
Class 2	Baromalli Dukalli Kereti Silverballi Kurahara Wabaima Karahoro Baradan Ubudi Kirikua Kurokai Maporokan Monkey Pot Manni Pakuri Yaruru (Yarula) Muneridian Wallaba	<i>Catostemma commune</i> <i>Parahancornia fasciculata</i> <i>Ocotea</i> spp <i>Calophyllum lucidum</i> <i>Licaria cayennensis</i> <i>Schefflera decaphylla</i> <i>Ocotea tomentella</i> <i>Anarcadium giganteum</i> <i>Iryanthera macrophylla</i> <i>Protium decandrum</i> <i>Inga alba</i> <i>Lecythis zabucajo</i> <i>Symphonia globulifera</i> <i>Platonia insignis</i> <i>Aspidosperma excelsum</i> <i>Siparuna</i> spp. <i>Eperua</i> spp (<i>falcata</i> & <i>grandiflora</i>)
Class 3	Burada Duka Dukaria Fukadi Inyak Limonaballi Suradan White Cedar Futui Halchiballi Haiariballi Huruasa Iteballi Kakaralli Kauta	<i>Parinari campestris</i> <i>Tapirira marchandi</i> <i>Sacoglottis cydonioides</i> <i>Terminalia amazonia</i> <i>Antonia ovata</i> <i>Chrysophyllum pomiferum</i> <i>Hyeronima alchorneoides</i> <i>Tabebuia insignis</i> var <i>monophylla</i> <i>Jacaranda copaia</i> <i>Pera schomburgkiana</i> <i>Alexa imperatricis</i> <i>Abarema jupunba</i> <i>Vochysia schomburgkii</i> <i>Eschweilera</i> spp (<i>sagotiana</i> & <i>subglandulosa</i>) <i>Licania laxiflora</i>

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Note:

The Guyana Forestry Commission is responsible for the provision of the domestic statistical data on forestry.