Forestry in Guyana

Quarterly Market Report

2003/3

GFC Website: WWW.FORESTRY.GOV.GY

GUYANA FORESTRY COMMISSION

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We thank you in anticipation of your co-operation.

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METRIC CONVERSION TABLE

Round Measurements (Logs, etc.):

27.7 $ft.^3$ (hoppus measurement)	=	1 m^3

Square Measurements (Lumber, etc.):

12 bm	=	1 $ft.^3$
423.7 bm	=	1 m^3
35.3 $ft.^3$	=	1 m^3

Charcoal:

2.2 lbs.	=	1 kg.
1 Bag (40 lbs)	=	18 kg.

GLOSSARY OF TERMS

Dressed Lumber	Wood sawn lengthways from logs, further processed by planning, 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 pieces 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 and for scaffolding.
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.
Primary Timber	Includes Logs, Firewood (raw materials), chainsaw lumber, Roundwood and Splitwood.
Round Logs	A bole or a large branch after felling. Under the ITTO definition it is referred to as **Industrial Roundwood**.
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 of usually Wallaba (*Eperua grandiflora)* wood used to construct roofs and for panelling purposes.
Spars	Saplings 15-25 cm in diameter.
Splitwood	Comprises paling and vat staves and shingles.
Timber	Includes 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.
Wattles	Saplings less than 8 cm in diameter.

SUMMARY

- Production of Logs: Log production decreased in the third quarter of 2003 by 42% as compared to the same period in 2002.

- Production of Chainsawn Lumber: Chainsawn Lumber increased by 74% overall in the third quarter of 2003 as compared to 2002. However, this figure does not include Sawmill returns.

- Production of Non-Timber Forest Products: Production of Wattles increased in 2003 by 50% for the quarter as compared to 2002. Mangrove Bark production also increased by 84% for the period. However Manicole Palm production declined by 13% when compared to production in 2002 for the same period in review.

- Royalty: The royalty for the period increased by 21% for the period in 2003 as compared with that of 2002.

- Export: Log export increased by 95 % for 2003 as compared with 2002 period in review.

INTRODUCTION

Guyana is a small, heavily forested country (75% cover of Tropical Forest of its 215,000 km^2), on the north coast of South America, with a population of some 770,000 who are predominantly settled along the coast. It is probably best known with respect to forestry as the source of Greenheart (*Chlorocardium rodiei*), which is widely used for marine work. Guyana also hosts the Iwokrama Rainforest Centre, an area of 360,000 hectares of largely pristine forest given by the Government of Guyana to the global community to provide a demonstration of conservation and sustainable utilisation. In addition, Conservation International is managing a 'Conservation Concession' which is about 80,000 hectares. The Kaieteur National Park is one of the few areas under protection. Other areas which are being considered for the Protected Areas System include the Orinduik Falls, the Kanuku Mountains, Mabura Hill Forest Reserve, Shell Beach, Moraballi Reserve and Mount Roraima.

Forests are vital to the survival of humanity. Through their ecological functions they provide the basis for sustaining life on earth. Forests around the world regulate the climate and water resources and are natural habitats for the thousands of flora and fauna found within. In addition, forests also provide a means of livelihood for a large number of people. The forests provide wood, food, medicine as well as recreation and spiritual renewal.

The Quarterly Market Reports provide an overview of the trends in production and trade of timber and non-timber products obtained from the 135,800 square kilometres of State Forest in Guyana.

Information presented was acquired from Forest Officers of the Guyana Forestry Commission (GFC), other Government organisations, producers, exporters and merchants.

The report begins with a summary of the performance of the production of the timber industry. It progresses with presentations of trends in production, export and prices (domestic and export).

Throughout the report comparisons are made with previous quarterly reports.

FORESTRY CONTRIBUTION TO GROSS DOMESTIC PRODUCT

Over the past decade, the contribution of the Forestry Sector to Guyana's GDP remained in the shadows of that of the Mining Sector and the rice, sugar and fishing industries. As Table 1 shows, forestry accounted for an average of 4% of GDP with 1995 – 1997 having the highest records of 4.9%, 4.6% and 4.9% respectively. However, the last three years indicate a fairly constant trend.

Table 1: Forestry as a Proportion of Gross Domestic Product 1993 - 2002(G$ Million)

	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002
GDP at Factor Cost*	4,104	4,450	4,676	5,048	5,360	5,270	5,426	5,352	5,474	5,536
Forestry	117	197	228	230	264	200	226	189	195	180
Forestry as % GDP	2.9%	4.4%	4.9%	4.6%	4.9%	3.8%	4.16%	3.53%	3.56%	3.25%

*GDP measures domestic output exclusive of indirect taxes on goods and services.
Source: Bank of Guyana's Annual Report and Statement of Accounts 2002.

DOMESTIC PRODUCTION

Forest Products

Log production for the third quarter 2003 declined by 42% as compared to the third quarter 2002. However, overall log production was below that of 2002. Greenheart logs and logs in the Class 2 Category were the highest contributor to overall production. There was an increase of log production in the Special Category and Class 2 by 25% and 13% respectively when compared to the cumulative period of 2002.

Production of Chainsawn Lumber increased by 74% from 7,854.74 m^3 in 2002 to 13,638.52 m^3 in 2003 for the third quarter. There was a general growth for all categories of Chainsawn Lumber with the largest production coming from Class 1.
Roundwood production in the third quarter increase by 10% from 114,244 m^3 in 2002 to 125,245 m^3 in the third quarter of 2003; Greenheart Piles and Wallaba Poles being the major contributors to this increase.

Splitwood production increased by 33% from 101,934 m^3 in 2002 to 135,085 m^3 in 2003. This increase was mainly due to Paling Stave production.

The production of Charcoal and Firewood both increased in the third quarter 2003 by 94% and 14% respectively as compared with 2002.

Non - Timber Forest Products

The production of Wattles doubled for the period in review as compared to 2002 production figures.

Mangrove Bark increased by 84% from 4,354 m^3 in 2002 to 7,999 m^3 in 2003.

Manicole Palm (*Euterpe oleracea)* is processed and canned in Guyana and primarily sold on the European market. The sole producer in Guyana is Amazon Caribbean Ltd., with operations in Berbice and Essequibo regions. A very small percentage of the end product is sold on the local market. The production of Manicole Palm in the third quarter decreased by 13 % when compared to the production in 2002.

Table 2: Production of Round Logs and other Forest Products

Classification	2002 – 2003 (July – September)				Cumulative (January – September)		
Logs	**Units**	**2002**	**2003**	**%Change**	**2002**	**2003**	**%Change**
Greenheart	m^3	26,650.93	15,727.99	(41)	75,376.63	53,762.07	(29)
Special Category	m^3	8,735.46	12,463.04	43	27,672.38	34,613.44	25
Class 1	m^3	16,544.79	9,966.35	(40)	37,201.82	36,975.48	(0.6)
Class 2	m^3	18,792.00	3,528.50	(81)	56,434.33	63,058.32	13
Class 3	m^3	5,349.61	2,710.32	(49)	10,621.42	8,983.69	(15)
Total	m^3	**76,072.79**	**44,396.20**	**(42)**	**207,306.58**	**197,393.00**	(5)
Chainsawn Lumber							
Greenheart	m^3	1,265.83	2,137.51	69	3,454.95	4,479.75	30
Special Category	m^3	415.86	815.47	96	1,103.58	1,999.08	81
Class 1	m^3	4,529.05	7,654.91	69	12,251.39	16,794.71	37
Class 2	m^3	1,141.49	1,902.96	67	3,243.45	4,145.08	28
Class 3	m^3	502.51	1,127.67	124	1,444.21	2,187.08	51
Total	m^3	**7,854.74**	**13,638.52**	**74**	**21,497.58**	**29,605.70**	**37**
Roundwood							
Greenheart Piles	m	46,818.59	39,802.76	(15)	103,805.10	106,809.68	3
Kakaralli Piles	m	497.73	6,274.41	1161	2,412.09	12,646.78	424
Mora Piles	m	0.00	0.00	0	1,196.06	0.00	(100)
Wallaba Poles	m	34,994.11	53,790.86	54	117,328.59	107,143.91	(9)
Posts	m	31,177.89	16,959.95	(46)	71,823.87	31,761.89	(56)
Spars	m	755.90	8,417.55	1014	5,502.25	21,627.59	293
Total	m	**114,244.22**	**125,245.53**	**10**	**302,067.96**	**279,989.85**	**(7)**
Splitwood							
Paling Staves	Psc	76,934.00	131,635.00	71	413,482.00	304,647.00	(26)
Vat Staves	Psc	0.00	0.00	0	0.00	0.00	0
Shingles	Psc	25,000.00	3,450.00	(86)	136,350.00	3,450.00	(97)
Total	**Psc**	**101,934**	**135,085**	**33**	**549,832**	**308,097**	**(44)**
Fuelwood							
Charcoal	Kg	80,213.20	155,863.26	94	845,609.97	302,699.96	(64)
Firewood	m^3	3,724.37	4,237.23	14	9,322.51	9,964.22	7
Other							
Plywood	m^3	…..	….	….	…..	…..	…..
Sawmill lumber	m^3	…..	….	….	…..	…..	…..
Non-Timer Forest Products							
Wattles	Pcs	17,401.00	26,030	50	62,860.00	70,325.00	12
Mangrove Bark	Kg	4,354.48	7,999.92	84	4,354.48	17,316.70	298
Manicole Palm	Stems	1,280,846.00	1,113,157.00	(13)	5,351,209.00	3,529,286.00	(34)

Data Source: the Guyana Forestry Commission's monthly production report.
Note:…. Means Data Unavailable

Primary Products

Chart 1 shows a comparison of the third quarter (July to September) 2002 with that of 2003. It indicates that the third quarter of 2002 was more productive than that of 2003. Total log production for 2002 was 76,072.79 m^3 as compared to 44,396.20 m^3 in 2003; there was a 42 % decrease in total quarterly log production in 2003 for the period in review.

Chart 1: Log Production (July- September 2002 - 2003)

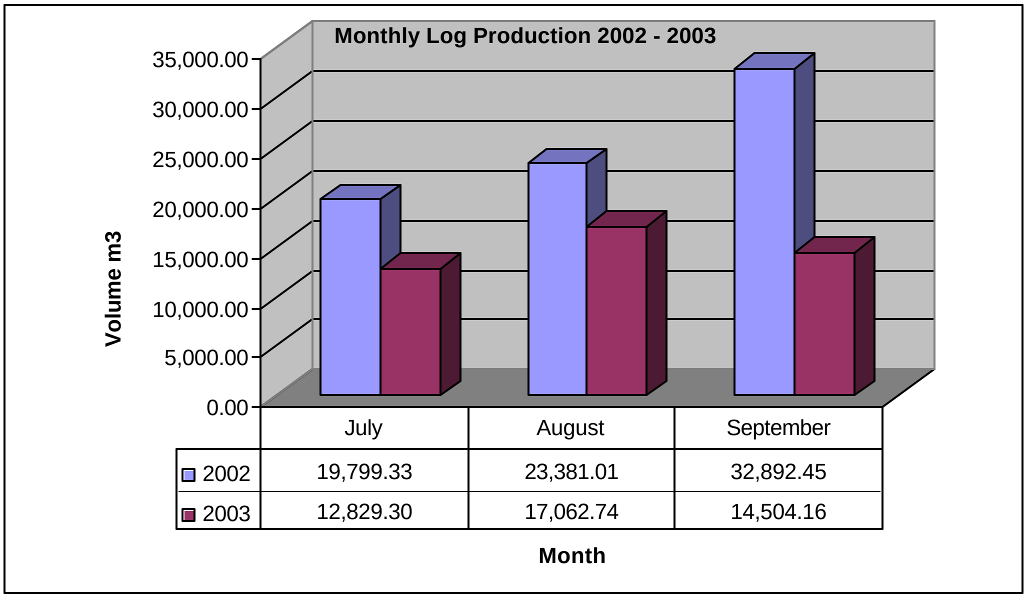


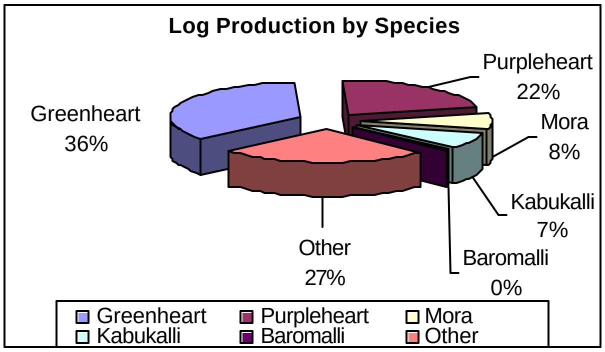
Chart 2.1 and 2.2 represents the second and third quarter of 2003 respectively. The species chosen for the chart are those with generally high production from each class/category defined by the Guyana Forestry Commission. They were chosen on the basis of their market value, demand and commercial use. Species represented in the charts are species with a generally high production from each class or category.

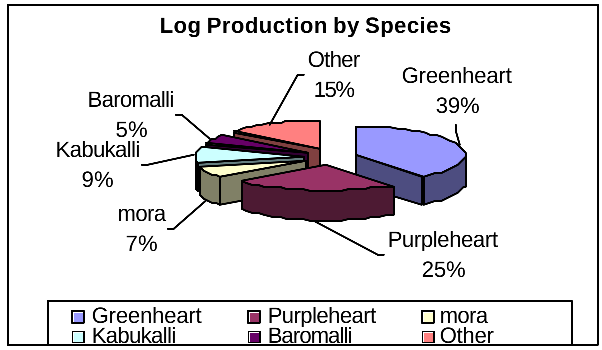
In the second quarter of 2003, Greenheart production was the highest for all species for the period at 36% (17,346 m^3), followed by “Other” with 27% (13,178 m^3), Purpleheart with 22% (10,998 m^3), then Mora 3,961.12 m^3, Kabukalli 3,627.98 m^3 and Baromalli 156.49 m^3.

A comparison of the second and third quarter 2003 indicates that Greenheart production in the third quarter was 39 % (14593 m^3); Purpleheart log production of 9381 m^3 was also higher in the third quarter. Kabukalli and Baromalli log production of 3302 m^3 and 1815 m^3 also increased in the third quarter compared to the second. However Mora and “Other” species reduced in production for this period.

Although the market share increased for the species depicted in the chart, the overall volume produced for the third quarter was 37,035 m^3, as compared to 49,268 m^3 in the second quarter; a decline of 25 %.

Chart 2: Log Production by Species





Note: "Other" Category is a compilation of all Class 2 and Class 3 Species excluding Baromalli.

Chart 2.1: Log Production by Species (April – June 2003)

Chart 2.2: Log Production by Species (July – September 2003)

Referring to the chart below (Chart 3), Chainsawn Lumber production in 2002 remained fairly constant throughout the period July to September. Comparing 2002 production with that of 2003, it is noted that production increased throughout the third quarter of 2003 with August producing the largest volume for the period as well as almost doubling production for the months of July and September. The major contributor of Chainsawn Lumber production for the third quarter 2003 was Greenheart and Class 1 Chainsawn Lumber. Total production for this quarter was 13,638.52 m^3 while production for 2002 was 7,854.74 m^3, a 74% increase in production.

Chart 3: Chainsawn Lumber Production 2002-2003

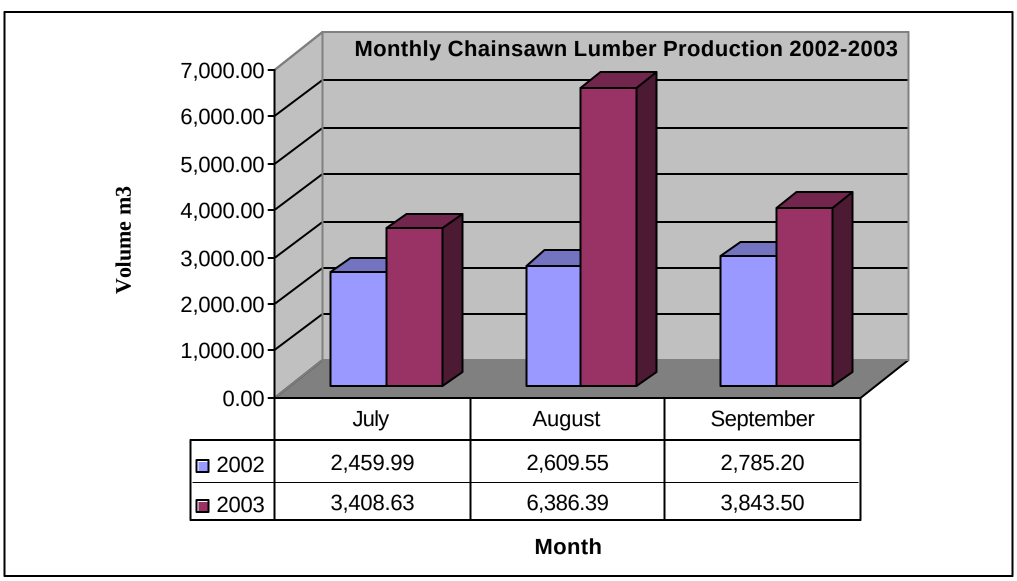
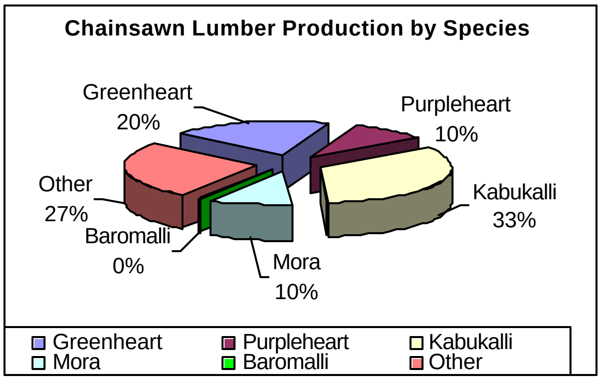
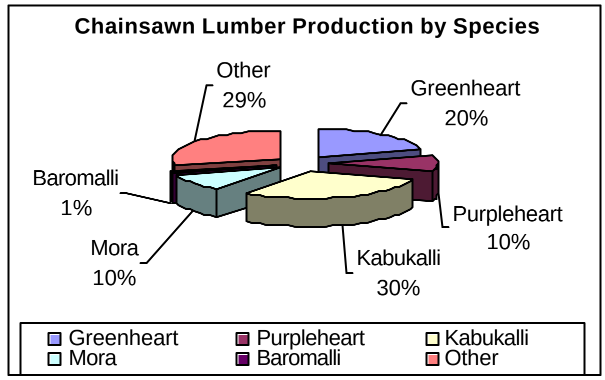


Chart 4 shows the total Chainsawn Lumber production in the second quarter of 2003; Kabukalli accounted for 33% (2,129.63 m^3), followed by "Other" with 27% (1,721 m^3), Greenheart 1,262.72 m^3, Purpleheart 631.56 m^3 and Mora 658.6 m^3. Production of Baromalli was at 0% for the period. In the third quarter of 2003 there was a general increase in market share for Chainsawn Lumber production; Kabukalli production was 2476 m^3, Greenheart 1,653 m^3, *"Other"* 2,354 m^3, Mora 840 m^3, Purpleheart 794 m^3, and Baromalli 70 m^3. Overall production for the third quarter 2003 for the production by species was 8,187 m^3, while that for the second quarter 2003 was 6,421 m^3: an increase of 28 %.

Chart 4: Chainsawn Lumber production by Species





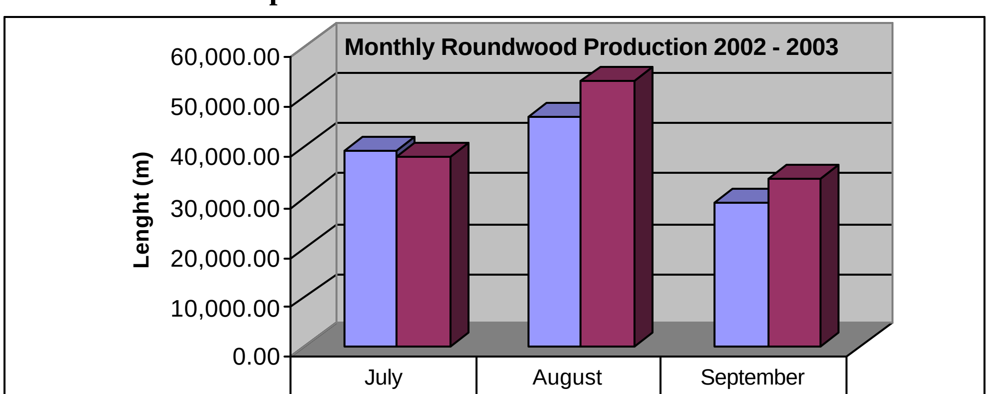
Note: "Other" Category is a compilation of all Class 2 and Class 3 Species excluding Baromalli.

Chart 4.1: Chainsawn Lumber Production (April – June 2003)

Chart 4.2: Chainsawn Lumber Production (July – September 2003)

Monthly Roundwood production for the third quarter 2003 presents a fluctuation in production with the highest volume of Roundwood for the period being produced in August. However, an overall review of the period indicates that except for July 2003, production was above that for the third quarter of 2002. Total production for 2003 was 125,245.53 m, a 10% increase compared to that of 2002 production totalling 114,244.22 m for the period (see Chart 5).

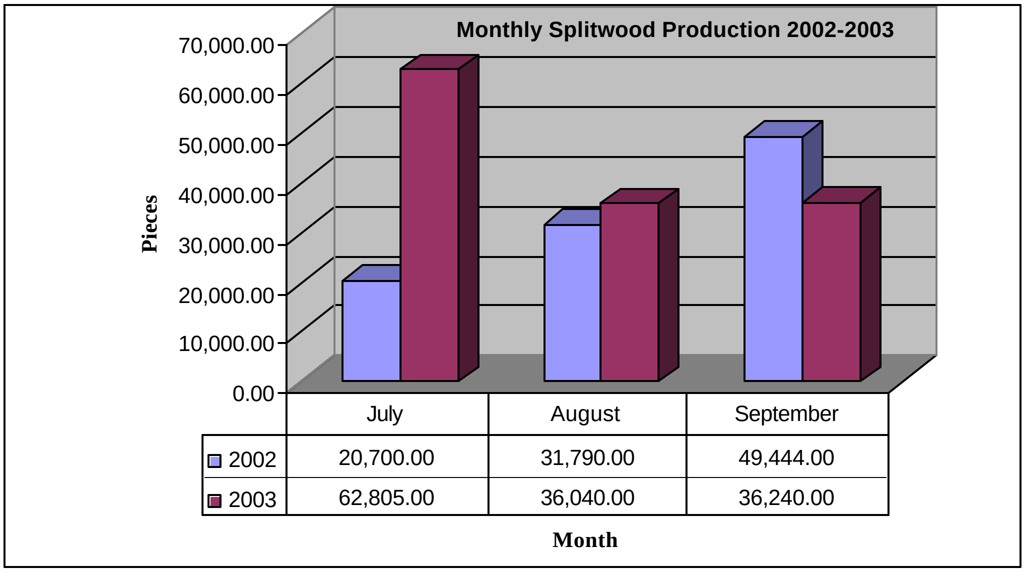
Chart 5: Roundwood production 2002-2003



	July	August	September
2002	39,230.44	46,182.34	28,831.44
2003	38,202.73	53,421.75	33,621.05

Splitwood production for 2003 as depicted in Chart 6 was exceptionally high in July, while August and September production combined amounted to little more compared to production in July. Despite this, the overall production in 2003 was 135,085 pieces, 33 % more than Splitwood production in 2002 (101,934 pieces) for the period in review.

Chart 6: Splitwood Production 2002-2003



	July	August	September
2002	20,700.00	31,790.00	49,444.00
2003	62,805.00	36,040.00	36,240.00

DOMESTIC PRICES

A mini survey was carried out to assess the current local market prices for a number of Guyana's commercially used wood species. The categories addressed were Logs, Dressed Lumber and Undressed Lumber. The results were as follows:

Table 3: Logs Prices (JULY – SEPTEMBER 2003)

Species	Unit	Average price (Jul-Sept.)
Logs		G$
Greenheart	$ft.^3$	-
Purpleheart	$ft.^3$	-
Brown Silverballi	$ft.^3$	196.37
Class 1		
Crabwood	$ft.^3$	196.37
Locust	$ft.^3$	240
Kabukalli	$ft.^3$	233.5
Hububalli	$ft.^3$	315
Shibadan	$ft.^3$	200
Simarupa	$ft.^3$	200
Mora	$ft.^3$	147
Ulu	$ft.^3$	80
Tauroniro	$ft.^3$	150
Tatabu	$ft.^3$	195
Wamara	$ft.^3$	260
Dalli	$ft.^3$	0
Class 2	$ft.^3$	
Baromalli	$ft.^3$	80
Kereti Silverballi	$ft.^3$	200
Wallaba	$ft.^3$	0
Dukali	$ft.^3$	70
Class 3	$ft.^3$	
Fukadi	$ft.^3$	157
Iteballi	$ft.^3$	175

Table 4: Dressed Sawnwood Prices (April – June 2003)

Species	Unit	Average price (Jul- Sept.)
Special Class		**G$**
Greenheart	Bm	120
Purpleheart	Bm	120
Brown Silverballi	Bm	95
Class 1		
Crabwood	Bm	90
Locust	Bm	70
Kabukalli	Bm	90
Hububalli	Bm	90
Shibadan	Bm	85
Simarupa	Bm	85
Mora	Bm	80
Ulu	Bm	85
Tauroniro	Bm	75
Tatabu	Bm	85
Wamara	Bm	85
Dalli	Bm	0
Deterama	Bm	0
Yellow Silverballi	Bm	75
Class 2		
Baromalli	Bm	40
Kereti Silverballi	Bm	90
Wallaba	Bm	65
Pakuri	Bm	75
Dukali	Bm	63
Class 3		
Fukadi	Bm	75
Iteballi	Bm	75
Kakaralli	Bm	55

Table 5: Undressed Sawnwood Prices (April – June 2003)

Species	Unit	Average price (Jul-Sept.)
Special Class		**G$**
Greenheart	Bm	125
Purpleheart	Bm	125
Brown Silverballi	Bm	90
Class 1		
Crabwood	Bm	60
Locust	Bm	80
Kabukalli	Bm	70
Hububalli	Bm	70
Shibadan	Bm	70
Simarupa	Bm	70
Mora	Bm	70
Ulu	Bm	60
Tauroniro	Bm	70
Tatabu	Bm	70
Dalli	Bm	40
Manniballi	Bm	40
BulletWood	Bm	40
Yellow Silverballi	Bm	55
Class 2		
Baromalli	Bm	30
Kereti Silverballi	Bm	80
Dukali	Bm	50
Class 3		
Futui	Bm	35
Maho	Bm	35

ROYALTY ON PRODUCTION

Royalty is levied on the production of timber, and varies between species and class categories. Although it fluctuated in the third quarter 2003, royalty for July and August were above that received in 2002. This can be seen in Chart 7. The overall review of the period indicated that there was a growth within the period; the royalty received in this quarter for 2003 totalled G$ 44,265,072.40, a 14% increase from 2002 (G$ 38,851,344.06). The major contributor to the increase in royalty was Chainsawn Lumber. Individually, Special Category Lumber and Wallaba Poles both earned higher revenue (royalty) though not enough to effect an increase in their respective classifications i.e. 'Logs' and 'Roundwood' respectively.

Chart 7: Royalty (2002-2003)

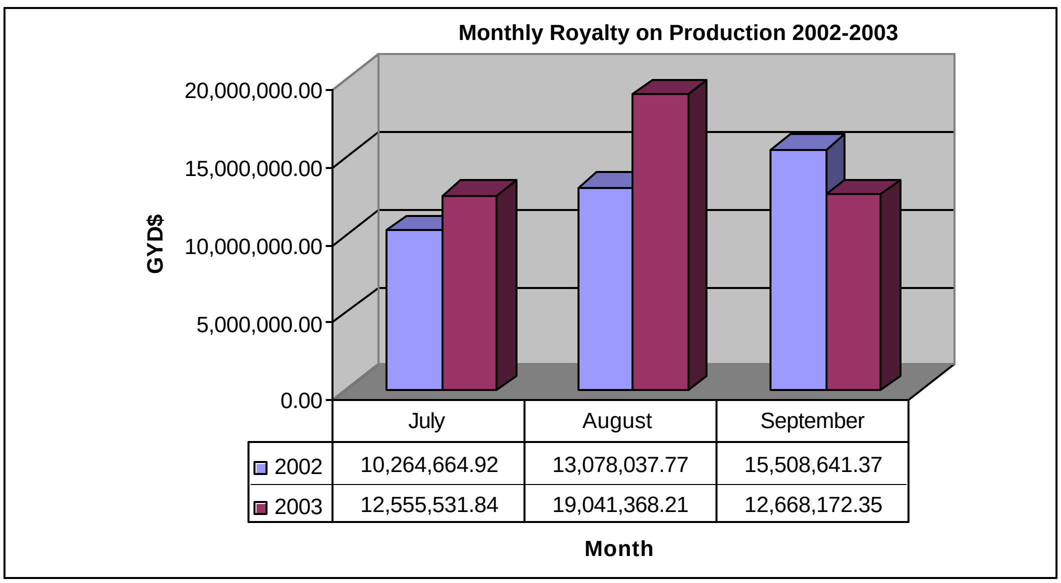


Table 6: Breakdown of Royalty (July – September 2002-2003)

	July – September			Cumulative		
Classification	**2002**	**2003**	**% Change**	**Jan- Sept. 2002**	**Jan –Sept. 2003**	**% Change**
Logs	G$	G$		G$	G$	
Greenheart	10,365,079.69	7,776,075.54	(24.90)	29,315,478.94	26,580,505.03	(9.33)
Special Category	3,397,395.10	6,161,851.61	81.37	10,762,342.03	17,113,230.87	59.01
Class 1	3,676,914.13	2,815,693.20	(23.42)	8,267,732.48	10,446,312.61	26.35
Class 2	2,610,208.81	623,027.25	(76.13)	7,838,728.44	11,134,207.56	42.04
Class 3	445,836.50	287,131.30	(35.60)	885,189.14	951,732.12	7.52
Total	**20,495,434.23**	**17,663,778.89**	**(3.32)**	**57,069,471.03**	**66,225,988.19**	**16.04**
Chainsawn Lumber						
Greenheart	3,135,068.50	5,293,949.64	68.86	8,556,840.12	11,094,952.03	29.66
Special Category	1,029,956.30	2,019,666.39	96.09	2,733,225.55	4,951,101.45	81.15
Class 1	6,415,218.16	10,842,873.82	69.02	17,353,603.88	23,789,034.93	37.08
Class 2	1,011,759.67	1,686,688.60	66.71	2,874,831.91	3,673,991.66	27.80
Class 3	266,385.58	597,789.14	124.41	765,590.16	1,159,392.98	51.44
Total	**11,858,388.21**	**20,440,967.59**	**72.38**	**32,284,091.62**	**44,668,473.04**	**38.36**
Roundwood						
Greenheart Piles	3,974,149.86	3,122,878.36	21.42	8,715,841.59	8,398,486.49	(3.64)
Kakaralli piles	10,616.58	133,833.17	1165	51,449.88	269,755.78	424.32
Mora Piles	0.00	0.00	0	25,511.96	0.00	(100)
Wallaba Poles	761,270.56	1,151,962.79	51.32	2,521,233.59	2,292,172.79	(9.08)
Posts	102,816.28	56,295.71	(45.25)	306,839.21	105,211.97	(65.71)
Spars	2,479.35	27,609.56	1013.7	18,047.38	70,938.50	293.07
Total	**4,851,332.63**	**4,492,579.59**	(7.39)	**11,638,923.61**	**11,136,565.53**	**(4.32)**
Splitwood						
Paling Staves	76,934	131,635.00	71.10	162,584.00	304,647.00	87.38
Vat Staves	0.00	0.00	0	0.00	0.00	0
Shingles	12,500	10,350.00	(17.20)	68,175.00	1,725.00	(97.47)
Total	**89,434**	**141,985.00**	**58.76**	**230,759.00**	**306,372.00**	**32.77**
Fuelwood						
Charcoal	105,881.42	205,739.50	94.31	331,702.76	399,563.95	20.45
Firewood	113,034.63	128,599.93	13.77	282,938.18	302,414.08	6.88
Total	**218,916.05**	**334,339.43**	**52.72**	**614,640.94**	**701,978.03**	**14.21**
Non-Timber Forest Products						
Wattles	52,203	78,090.00	49.59	188,580.00	210,975.00	11.86
Mangrove Bark	4,789.93	8,799.91	83.73	4,789.93	19,048.37	276.86
Manicole Palm	1,280,846	1,113,157.00	(13.09)	2,995,526.00	3,529,286.00	17.82
Total	**1,337,838.93**	**1,200,046.91**	(10.30)	**3,188,895.93**	**3,759,309.37**	17.89
Total Royalty	**38,851,344.05**	**44,273,697.41**	**13.96**	**105,026,782.10**	**126,798,686.1**	**20.73**

Data Source: The Guyana Forestry Commission's monthly Production Reports.

EXPORT VOLUME AND VALUE

Table 7: Export Volume of Forest Products

Products	Unit	3rd Quarter (Jul- Sept) 2002	2003	% Change	Cumulative (Jan – Sept) 2002	2003	% Change
Logs	m^3	13,549.80	26,422.56	95	39,234.65	42,668.69	9
Sawnwood	m^3	7,649.35	8,273.85*	7	23,219.32	20,333.96	(12)
Roundwood							
Poles	m^3	108.29	410.60	279	763.27	1,114.78	46
Post	m^3	139.27	66.70	(53)	326.52	201.40	(38)
Piles	m^3	1,687.50	1,537.75	(9)	3,745.73	4,585.86	30
Total Roundwood		1,935.06	2,015.05	4	4,835.52	5,902.04	22
Split wood	m^3	260.58	282.95	8	558.35	697.26	25
Charcoal	kg	11,608.79	0	(100)	128,063.79	85,264	(33)
Plywood	m^3	10,987.24	9,705.71	(12)	37,250.86	38,568.30	(4)
	Sheets	521.50	606	16	2,799.50	992	(65)
Heart of Palm		.....	.....	.....	.....	.....	.....
Others							
Doors & Frames	No	2,692.00	1,659	(38)	4,931	4,442	(10)
Windows & Frames	No	557.50	133	(76)	846.50	437	(48)
Moulding	Lin. Ft	81,792.00	119,736.00	46	159,308	330,133	107
Furniture	Pcs	4,708.00	5,112	9	22,948	33,760	47
Craft	Pcs	12,122.00	731	(94)	18,957	4,083	(78)
Louvre Blades	Pcs	33,935.00	0	(100)	120,767	76,102	(37)
Spindles	No	2,214	1,766	(20)	2,311	5,324	130

Data Source: The Guyana Forestry Commission's monthly export reports.
Note: ……Means Data unavailable.

- Production of Sleepers was zero.
- Production of paling Staves was zero.
- There was zero production of Dowels (wooden pegs) and Pickets, only shingles were exported.
- Firewood Production was also zero.
- *Volume of Sawn and Dressed Sawnwood for the 3rd quarter 2003:
  Sawn: 4,693.61 m^3
  Dressed: 3,580.24 m^3

Table 8: Export Value of Forest Products

Products	3rd Quarter(Jul - Sept) G$		% Change	Cumulative (Jan – Sept) G$		% Change
	2002	2003		2002	2003	
Logs	203,340,952	409,191,478	101	715,647,189	685,082,438	(4)
Sawnwood	500,530,284	552,043,817*	10	1,464, 772,210	1,335,335,465	(9)
Roundwood						
Poles	3,500,200	13,083,200	274	25,980,845	38,311,095	47
Post	5,664,101	2,390,108	(58)	11,633,651	8,405,801	(28)
Piles	49,412,581	51,474,871	4	116,454,434	146,460,176	26
Total Roundwood	58,576,882	66,948,179	14	154,068,930	193,177,072	25
Splitwood	26,748,475	23,804,808	(11)	54,395,775	60,561,341	11
Firewood	0	0	0	217,005	26,897	(88)
Charcoal	266,400	0	(100)	3,169,583	1,937,737	(39)
Plywood	497,006,782	420,315,528	(15)	1,706,266,461	1,666,942,460	(2)
Heart of Palm	.....	.....	.....	.....	.....	....
Others						
Doors & Frames	27,725,879	19,605,358	(29)	58,784,447	58,780,686	(0.01)
Windows & Frames	1,544,800	1,229,796	(20)	3,783,928	5,726,030	51
Moulding	5,203,788	9,312,577	79	9,794,931	24,009,150	145
Furniture	43,124,377	39,566,119	(8)	312,911,849	310,548,325	1
Craft	560,842	1,022,505	82	11,566,507	3,780,080	(67)
Louvre Blades	4,592,775	0	(100)	16,866,979	9,739,788	(42)
Spindles	700,488	913,759	30	734,066	3,619,916	393

Data Source: The Guyana Forestry Commission's monthly export reports.
Note: …..Data unavailable

- *Value of Sawn and Dressed Sawnwood for the 3rd quarter 2003:
  Sawn: G$291,746,974.00
  Dressed: G$260,296,843.00

EXPORT

Logs (Industrial Roundwood)

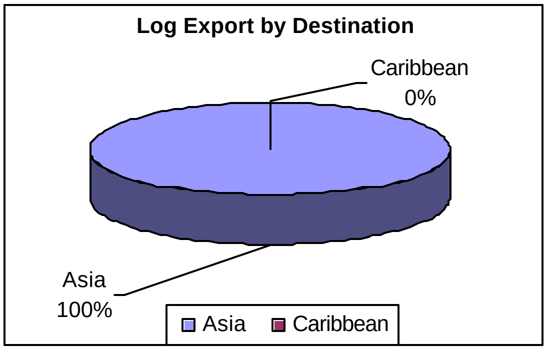
Guyana's export destinations are countries within Asia/Pacific, Europe, North America, South America and the Caribbean/Latin America. Since the commencement of the year Asia (India, Taiwan, and Thailand) has been our largest export market for logs.

The third quarter of 2003 offered no change to this trend. Export to India equalled 14,699 m^3; Taiwan and Thailand, 215 m^3 and 350 m^3 respectively, with 81 m^3 sold to China. This sample of the Asian market absorbed 16,435 m^3 of Guyana's logs;

Trinidad absorbed 292 m^3 and North America 280 m^3. As depicted in the graph the market has expanded to include North America for the period in review compared to the third quarter of 2002, in which 13,548 m^3, was exported or a value of G$ 203,340,952.00. Log export for the same period in 2003 totalled 26,102 m^3 (a 93 % increase) at a value of G$ 409,191,478.00.

Important to note is that this 93 % jump in log export in the third quarter does not translate into a similar effect on the year to date export volume and earnings.
The cumulative quantity exported in 2003 as compared to that of 2002 indicates a 9% increase. The cumulative export earning of 2003 remained less than that of 2002. In other words, the dramatic increase served to compensate for a relative shortfall in export experienced in the quarter proceeding ,which translated to a 2003's export earnings from Jan – June being G$261,927,139.00 less than 2002's. See Table 7 and 8.

Chart 8: Log export by Destination 2002-2003



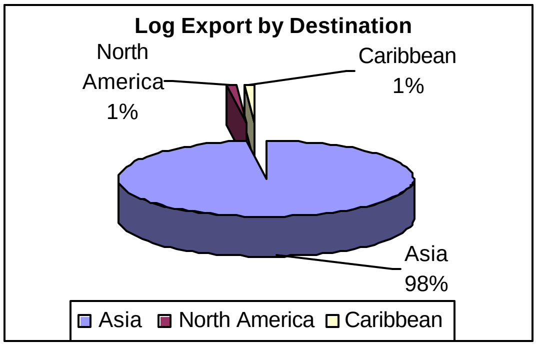


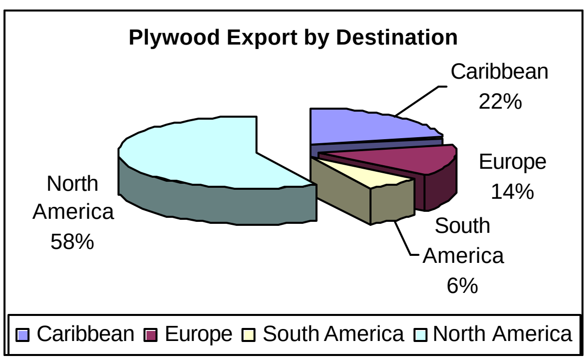
Chart 8.1 : July – September 2002 **Chart 8.1 : July – September 2003**

Plywood Export

For the third quarter of 2003 total export of Plywood amounted to 6,121 m^3, with the largest market being North America (2,719 m^3) closely followed by the Caribbean (2,091 m^3). The European market absorbed 485 m^3, while that of South America, 826 m^3. Altogether Plywood export totalled 9,705.71 m^3 (a 12 % decline from 2002's third quarter total) at a value of G$20,315,528. This effected a 15 % decline from 2002's third quarter export earnings.

International Plywood prices were generally higher in this quarter than in that of 2003 and the Guyana Dollar depreciated by an additional G$2.59 to the US Dollar (see Table 11). Guyana's Plywood in the review period of 2003 was therefore sold at an average price of US$13.5 less than that received in the corresponding quarter in the year prior.

Chart 9: Plywood Export by Destination 2002-2003



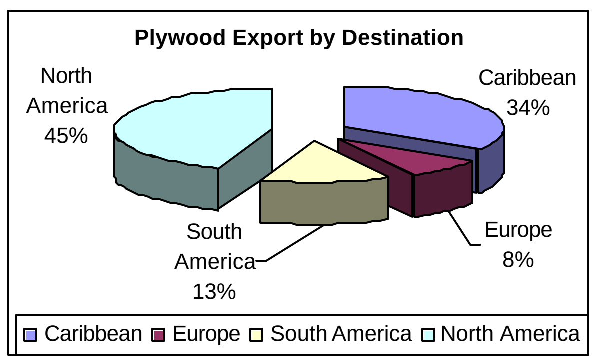


Chart 9.1: July – September 2002 **Chart 9.2: July – September 2003**

Roundwood Export

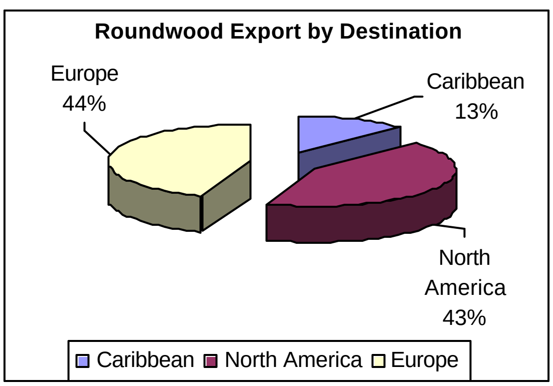
The third quarter of 2003's export of Roundwood consisted of 1,538 m^3 of Greenheart Piles, 66.7 m^3 of Wallaba Poles and 410.6 m^3 of Wallaba posts.

North America remained the primary consumer of Greenheart Piles, absorbing 992 m^3 (a 19.8 %) increase from the same period of the preceding year) and Trinidad, the primary consumer of Wallaba Poles, absorbing 66.7 m^3 of Wallaba Poles (53.36 %) decline from the same period of 2002). Wallaba Posts were exported to the Caribbean territories of Barbados, St. Lucia, St. Nevis and Martinique (see Chart below).

The 52.5 % decrease in export of Posts in 2003 was more than compensated for by a 279 % increase in that of Poles, effecting a 4.14 % increase in 2003's total Roundwood export compared to 2002's. In other words 2002's third quarter Roundwood exported amounted to 1,935.06 m^3 while that of 2003, was 2,015.05 m^3 (see Table 7)

From one year's quarter to the next, Roundwood export revenue increased proportionally. The earnings from poles export in 2003 (3rd Quarter) amounted to G$13,083,200 (274 %) more than the 2002's G$3,500,200; earning from Posts amounted to G$2,390,108 (58 % less than that of 2002); while the earnings from Piles increased just 4 % over 2002's G$49,411,581 (see Table 8). Evidently there was hardly any change in the international market for Guyana's Roundwood from the same period in 2002.

Chart 10: Roundwood Export by Destination 2002- 2003



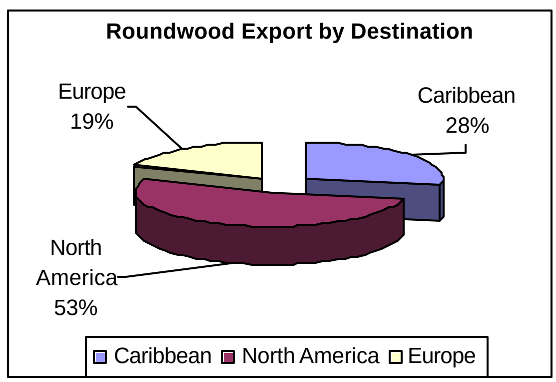


Chart 10.1: July – September 2002 **Chart 10.2: July – September 2003**

Sawnwood Export

The export destinations of the 3rd Quarter of 2003 was consistent with that of 2002. These included Caribbean territories (primarily Barbados, Trinidad, Grenada and St. Lucia), European countries (inclusive of the United Kingdom and Holland), Asia (primarily China) and the United States of America.

In 2003, the Caribbean remained the largest consumer of Guyana's Sawnwood, consuming a total of 5232.11 m^3 (64% of this quarter's total export), topping last year's total of 3623.22 m^3 (47% of this quarter's total export). Europe followed with 2291.69 m^3 (28% of this quarter's total export), compared with 1939.83 m^3 (25% of this quarter's total export) in 2002.

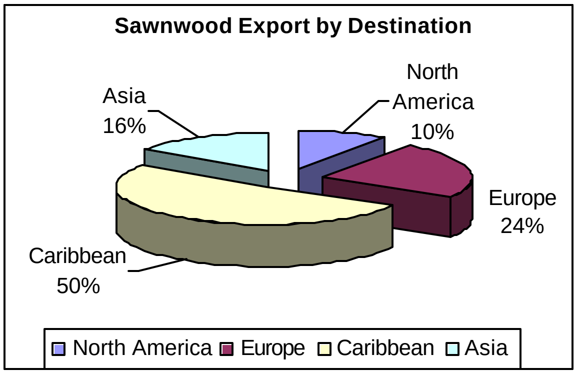
Inspite of the 7% increase in the total export in Sawnwood from the 3rd quarter of 2002 to that of 2003, the year to date (cumulative January –September) export quantity was 13% less than that of 2002 (see Table 7).

Sawnwood Export Revenue of the 3rd quarter increased 10 % over that of the corresponding period in 2002; the year to date total was however 9% less than that of the corresponding period of the preceding year. This was due to greater revenue being earned in the 1st and 2nd quarters of 2002 (a total of G$ 179,859,296 more) than in 2003 (see Table 8).

A partial breakdown of Sawnwood export revenue is approximated as follows:

Country	**3rd Quarter 2002**	**3rd Quarter 2003**
Grenada	$ 21,982,534	$ 19,704,818
Barbados	$ 149,262,843	$ 217,110,981
Trinidad and Tabago	$ 29,597,630	$ 42,702,546
Caribbean (Other)	$ 44,430,387	$ 75,860,033
USA	$ 41,235,285	$ 25,661,537
China/Vietnam	$ 85,292,505	$ 3,670,723
Dubai	$ 5,045,783	$ 4,975,153
Middle East (Other)	$ 11,187,190	$ 6,842,929
UK	$ 76,153,393	$ 115,110,380
France	$ 735,000	$ 8,384,200
Europe (Other)	$ 29,693,624	$ 30,430,501
Australia	-	$ 1,720,500

Chart 11: Sawnwood Export by Destination 2002-2003



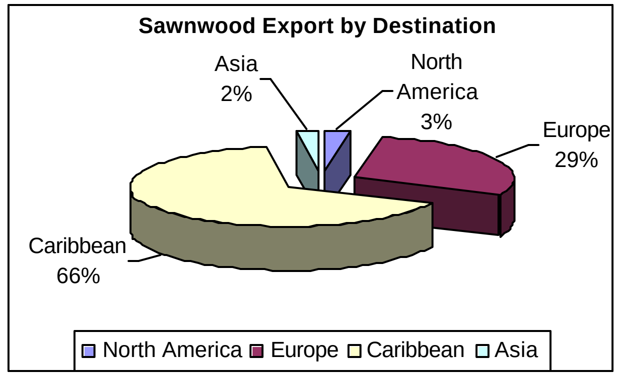


Chart 11.1: July – September 2002

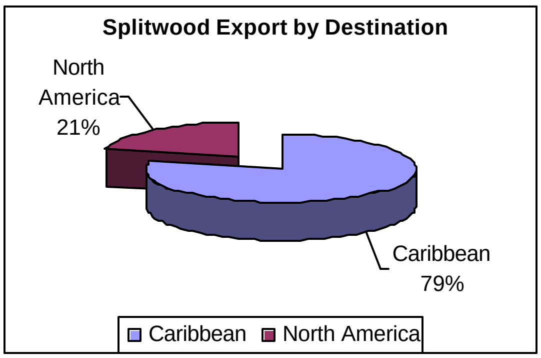
Chart 11.2: July – September 2003

Splitwood Export

The export of Splitwood in 2002 was mostly to the Caribbean and North America. The Caribbean imported 79% (203 m^3) while North America imported 55 m^3. Total exports for 2002 3rd quarter was 261 m^3 (see Chart 12).

The 3rd quarter 2003 export of Splitwood was destined for the Caribbean and Europe. Chart 12.3 which breaksdown Splitwood export by country; indicates that Jamaica (46 m^3), Antigua (30 m^3) and Barbados (20 m^3) imported the bulk of Guyana's Splitwood for the period. Total export amounted to 282.95m^3, an 8% increase over 2002's 3rd quarter earnings.

Chart 12: Splitwood Exported by Destination 2002 – 2003



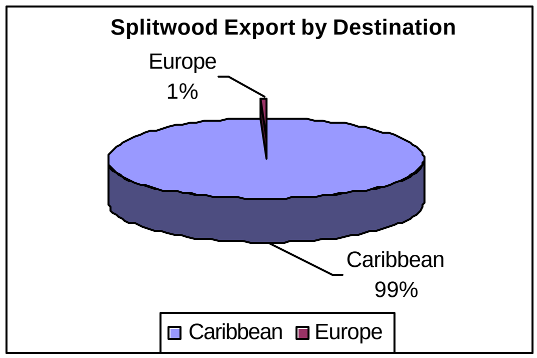


Chart 12.1: **July – September 2002** **Chart 12.2:** **July – September 2003**

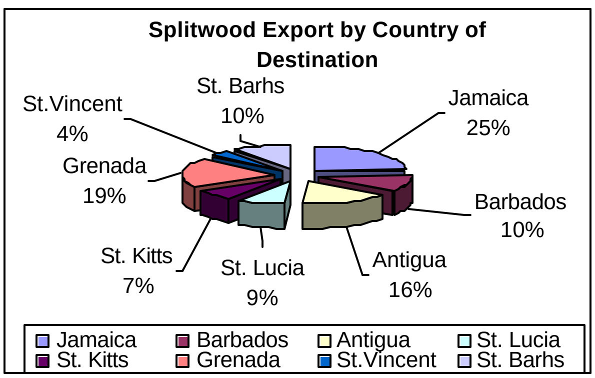


Chart 12.3: **July – September 2003**

IMPORTS OF FORESTRY AND FORESTRY RELATED PRODUCTS TO GUYANA

Table 9: Imports July – September 2003

Description	Unit	Quantity 1	Unit	Quantity 2	Total Value (G$)	Country imported from
Pitch - Pine	m^3	337	Kg	3,572	522,080	United States of America
Other Coniferous Woods	m^3	188	Kg	185	28,000	Canada
Caribbean Red Cedar	m^3	14	Kg	12,800	1,149,254	Barbados
Greenheart Wood*	m^3	16,562	Kg	36,491	5,459,523	Barbados
Other Tropical Woods	m^3	2,189	Kg	33,000	3,241,467	Barbados
Coniferous Veneer Sheets	m^3	110	Kg	350	1,921,774	United States of America
Veneer Sheets and sheets for plywood	m^3	2	Kg	10	11,281	China
Densified Wood	m^3	0	Kg	1,400	545,099	United States of America
Particle Boards	m^3	89,017	Kg	0	1,450,918	United States of America
Plywood	m^3	7,845	Kg	20,033	2,612,018	United States of America
Fibreboards	m^3	0	Kg	21,500	1,365,760	Poland
Fibreboards	m^3	0	Kg	26,354	2,069,185	Venezuela
Fibreboards	m^3	0	Kg	69,324	4,116,029	United States of America
Fibreboards	m^3	0	Kg	34,805	2,853,957	China
Fibreboards	m^3	0	Kg	21,182	1,596,694	Canada
Split poles, Piles, Pickets, of other wood	m^3	0	Kg	40	600	United States of America
Wood wool ; wood flour	m^3	0	Kg	19,253	3,614,220	Canada

Data Source: National Bureau of Statistics.
* Note that Greenheart in this case is not *Chlorocardium rodiei*.

CONCESSION DETAILS

There are three types of concessions that are awarded based on area size and duration. The State Forest Permission (SFPs) is granted for a one year period on no more than 8,000 hectares, the Timber Sales Agreement (TSAs) is granted for up to twenty-five years for an area in excess of 24,000 hectares, while the Woodcutting Lease (WCLs) is granted for three to ten years for 8,000 to 24,000 hectares.

The number of Concessions currently active are as follows:

SFP's

Division	**Number**
Demerara	104
Berbice	79
Essequibo	75
Total	258

TSA

Division	**Number**
Demerara	3
Berbice	5
Essequibo	12

WCL

Division	**Number**
Demerara	0
Berbice	0
Essequibo	2

CALENDAR OF KEY ISSUES

19th – 22nd August 2003

The GFC participated in a Guyana Geology and Mines Commission (GGMC) Exhibition. This was held at the Umana Yana on High Street Kingston. This exhibition brought out the changes taking place in the mining communities. Forestry, as an environmentally conscious organisation, emphasised the need for collaboration between the two organisations to better utilise the natural resources remaining.

30th August 2003

The "Guyana Nite" Exhibition was held on this day and due to popular demand was held over on the 6th of September 2003. The Guyana Forestry Commission participated fully as it was a promotional activity by the New Guyana Marketing Corporation to promote "Buy Local". This was a prime opportunity for the Forestry Commission to familiarise the public with a diversity of products derived from Tropical Rain Forests.

ANNEX

Table 10: MAJOR USES OF SPECIES.

Classification	Species (Local Names)	Species (Scientific Names)	Major Uses
Special Category	Greenheart	*Chlorocardium rodiei*	Boat building, marine work, piling, general heavy construction, flooring, heavy furniture, turnery and finishing rods.
	Purpleheart	*Peltogyne venosa*	Building construction, flooring, bridging, boat building – keels, transoms, canoes, coach building, furniture, turnery, inlay, tool handles, sticks, bows, and veneer.
	Brown Silverballi	*Licaria cannella*	Boat building, canoes, furniture, interior work, and general carpentry.
	Red Cedar	*Cedrela odorata*	Furniture, cabinet work, panelling, boats, coffins and cigar boxes.
	Letterwood	*Brosimum guianense*	Inlay, turnery, sticks, tool handles and bows for archery.
	Bulletwood	*Manilkara bidentata*	General heavy construction, house framing, sleepers, mill rollers, wheel spokes, fencing, axe and tool handles, turnery.
Class 1	Crabwood	*Carapa guianensis*	General construction, interior work, carpentry, furniture, and turnery, plywood and veneer.
	Yellow Silverballi	*Aniba hypoglauca*	Boat planking, canoes, furniture, cabinet work, and interior construction.
	Itikiboraballi	*Swartzia xanthopetala*	Inlay turnery, cabinet work, walking sticks, bag-pipes and tool handles.
	Locust	*Hymenaea courbaril*	Ship-building, general construction, carriage buildings, tool handles, furniture and croquet mallets.
	Tatabu	*Diplotropis purpurea*	Boat-building, house framing, and flooring, furniture and turnery, interior work, carriage-building, tool handles, and sleepers.
	Determa	*Ocotea rubra*	Boat and carriage building, masts, furniture, carving, interior work, and general carpentry.
	Wamara	*Eperua grandiflora*	Furniture, cabinet work, parquet flooring, turnery, inlay, tool handles, walking sticks, and bows for archery.
	Kabukalli	*Goupia glabra*	Heavy construction, house framing, flooring, decking, punt bottoms, canoes, railway sleepers, paving blocks, furniture and decorative plywood.
	Shibadan	*Aspidosperma album*	Fuel and Plywood.
	Tauroniro	*Humiria balsamifera*	Heavy construction, piling, bridges, house framing, flooring, wheelwright work, furniture, sleepers, counters, work bench tops.
	Manniballi	*Moronobea coccinea*	Heavy construction house sills, machinery frames, flooring, furniture and sheet piling.
	Washiba	*Tabebuia* sp.	Bridges, house framing, sleepers, tool handles, rollers' walking sticks, and fishing rods.
	Hakia	*Tabebuia serratifolia*	Bridges, house framing, sleepers, tool handles, rollers' walking sticks, and fishing rods.
	Dalli	*Virola spp.*	Match boxes, coffins, inside boarding, carpentry, packing cases, plywood, slack cooperage chip board and concrete shuttering.
	Suya	*Pouteria speciosa*	Interior boarding, carpentry, and plywood.
	Ulu	*Trattinickia demerarae*	Inside boarding, cupboard linings, canoes and plywood.
	Simarupa	*Quassia simarouba*	Interior construction, furniture, shelves, drawer linings, shoe heels, plywood, paper pulp, toys, box shooks.
	Aromata	*Clathrotropis branchypetala*	Furniture, house framing, boat building, flooring and sleepers.
	Mora	*Mora excelsa*	Building construction especially flooring, framing and siding, boat building especially ribs, stems, knees, transoms, and decking, sleepers, furniture, turnery, wagon building; wheelwright-work, naves and felloes, croquet mallets.
	Morabukea	*Mora gonggrijpii*	Heavy construction, sleepers, flooring and siding, heavy furniture, boat timbers, truck bodies.
	Hububalli	*Loxopterygium sagotii*	Panelling, furniture and cabinet work.
Class 2	Baromalli	*Catostemma commune*	Dry cooperage, interior work, box shooks, paper pulp, and plywood.
	Dukalli	*Parahancornia fasciculata*	Carpentry, interior work, furniture, door and window stock, concrete shuttering, match boxes and plywood.
	Kereti Silverballi	*Lauraceae spp*	Shuttering, temporary buildings, box making, and plywood.
	Kurahara	*Calophyllum lucidum*	Boat planking, canoes, punt mast and furniture.
	Wabaima	*Licaria cannella*	Heavy construction, flooring, furniture, boat building (planking), bridge decking, musical instruments.
	Karohoro	*Schefflera decaphylla*	Match splints, drums, canoes, interior construction and plywood.
	Baradan	*Ocotea tomentella*	Canoes, box shooks, concrete shuttering and plywood.
	Ubudi	*Anarcadium giganteum*	Interior work and plywood.
	Kirikua	*Iryanthera macrophylla*	Oars, interior construction, box shooks, utility plywood, slack cooperage and concrete shuttering.
	Kurokai	*Protium decandrum*	Masts, spars, house framing and plywood.
	Maporokan	*Inga alba*	Interior work, fuel and cheap plywood.
	Monkey Pot	*Lecythis zabucajo*	General construction, furniture, turnery and wheel spokes.
	Manni	*Symphonia globulifera*	Utility wood, paper, pulp, plywood, cooperage, railway sleepers, sheet piling, packing cases, general carpentry, flooring, furniture and fuel.
	Pakuri	*Platonia insignis*	Piling, boat building, furniture, turnery, house framing, flooring, panelling, tight cooperage and general carpentry.

Annex

Classification	***Species (Local Names)***	*Species (Scientific Names)*	***Major Uses***
	Yaruru (Yarula)	*Aspidosperma excelsum*	Paddles, axe and tool handles, walking sticks, fishing rods and fuel.
	Muneridian	*Siparuna spp.*	
	Wallaba	*Eperua falcata* *Eperua grandiflora*	Pillar trees, roundwood framing, fence posts, transmission poles, sleepers, paling and vat staves, shingles, charcoal, particle board and firewood.
Class 3	Burada	*Parinari campestris*	Heavy construction, flooring.
	Duka	*Tapirira marchandi*	Interior construction, furniture, box shooks and plywood.
	Dukuria	*Sacoglottis cydonioides*	Heavy construction.
	Fukadi	*Terminalia amazonia*	House framing, framing, constructional work, railway sleepers and plywood.
	Inyak	*Antonia ovata*	Interior work, furniture and boxes.
	Limonaballi	*Chrysophyllum pomiferum*	Heavy construction and fuel.
	Suradan	*Hyeronima alchorneoides*	Boat-framing, railway sleepers, heavy construction, truck building, wheel spokes, furniture, plywood and gun stocks.
	White Cedar	*Tabebuia insignis*	Paddles, shovel handles, and interior work, packing cases and cheap furniture.
	Futui	*Jacaranda copaia*	Coffins, box shooks, matches, concrete shuttering and interior construction.
	Halchiballi	*Pera schomburgkiana*	Fuel and utility plywood.
	Haiariballi	*Alexa imperatricis*	Interior construction, packing cases and plywood.
	Huruasa	*Abarema jupunba*	Fuel and plywood.
	Iteballi	*Vochysia schomburgkii*	Carpentry and furniture.
	Kakaralli	*Eschweilera alata*	Piling, house framing, mine lagging, posts and sleepers.
	Kauta	*Licania laxiflora*	Light gauge railway sleepers, roof shingles, mine timbering, fuel and charcoal.

Table 11: Exchange Rate (G$/ US$)

	Bank of Guyana		**Market Exchange Rate**	
	Period Average		**Period average**	
Month	**2002**	**2003**	**2002**	**2003**
January	189.59	191.75	187.59	191.00
February	190.25	191.89	187.93	191.98
March	190.50	192.41	188.51	192.71
April	190.50	193.75	187.66	192.53
May	190.50	193.16	187.94	192.62
June	190.51	193.45	187.97	192.77
July	190.89	193.93	188.47	192.79
August	191.19	194.28	188.51	192.68
September	191.00	194.61	188.82	192.64
October	190.61		189.73	
November	190.69		190.87	
December	191.75		190.37	

Source: Bank of Guyana.

Note: the Guyana Forestry Commission uses a fixed rate of exchange for each year regardless of fluctuations.
2003's exchange rate is GYD$185= US$1

OUR CORRESPONDENT STATIONS

Guyana Forestry Commission

Head Office
1, Water Street,
Kingston,
Georgetown.
Tel: 2267271/ 4

Stations

Demerara	Berbice	Essequibo
Soesdyke Tel:261 2310	**Canje** Tel: 333 3259/333 3231	**Parika** Tel: 260 4084/ 260 4217
Linden Tel: 4445984	**Springlands** 339 3078	**Bartica** 455 2332/ 455 2255
Mabura Tel: 226 5382	**Kwakwani**	**Supenaam** 774 4944
	Bamboo Landing	**Arapiarco** Tel: 771 4735
		Iteballi
		Winiperu
		Anarika
		Buckhall
		Mabaruma Tel: 777 5131
		Port Kaituma
		Manaka

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