

HIDDEN COSTS & VALUES

NTFP market chains in Central Africa

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Mobilisation & Capacity Building for Small & Medium Enterprises in NWFP Production and Commercialisation in Central Africa

Project GCP/RAF/408//EC

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THINKING beyond the canopy



Aims



Prunus africana



- **Assess the economic, social & environmental value of NTFPs in the Congo Basin**
- **Hear from actors the challenges & opportunities in exploiting & commercialising NTFPs**
- **Provide baseline information for decision-making & improve forest based livelihoods and SMFEs in the production and commercialisation of NTFPs**
- **Identify bottlenecks in NTFP exploitation**

Methodology

Background

- Literature review
- Criteria developed
- Chain selection

Preliminary

- Rapid assessment
- Key informant interviews

5 VCAs 2007-2009

- Semi & structured interviews 25% sample actors in chains = 2,521 actors & 830 consumers in DRC
- 40 focus group interviews
- 7 problem analysis workshops in 4 cities .

Action data

- Participatory action research: 2 in Cameroon.
- Market price tracking: 2 in Cameroon
- Monitoring & situational updates, training & capacity building events

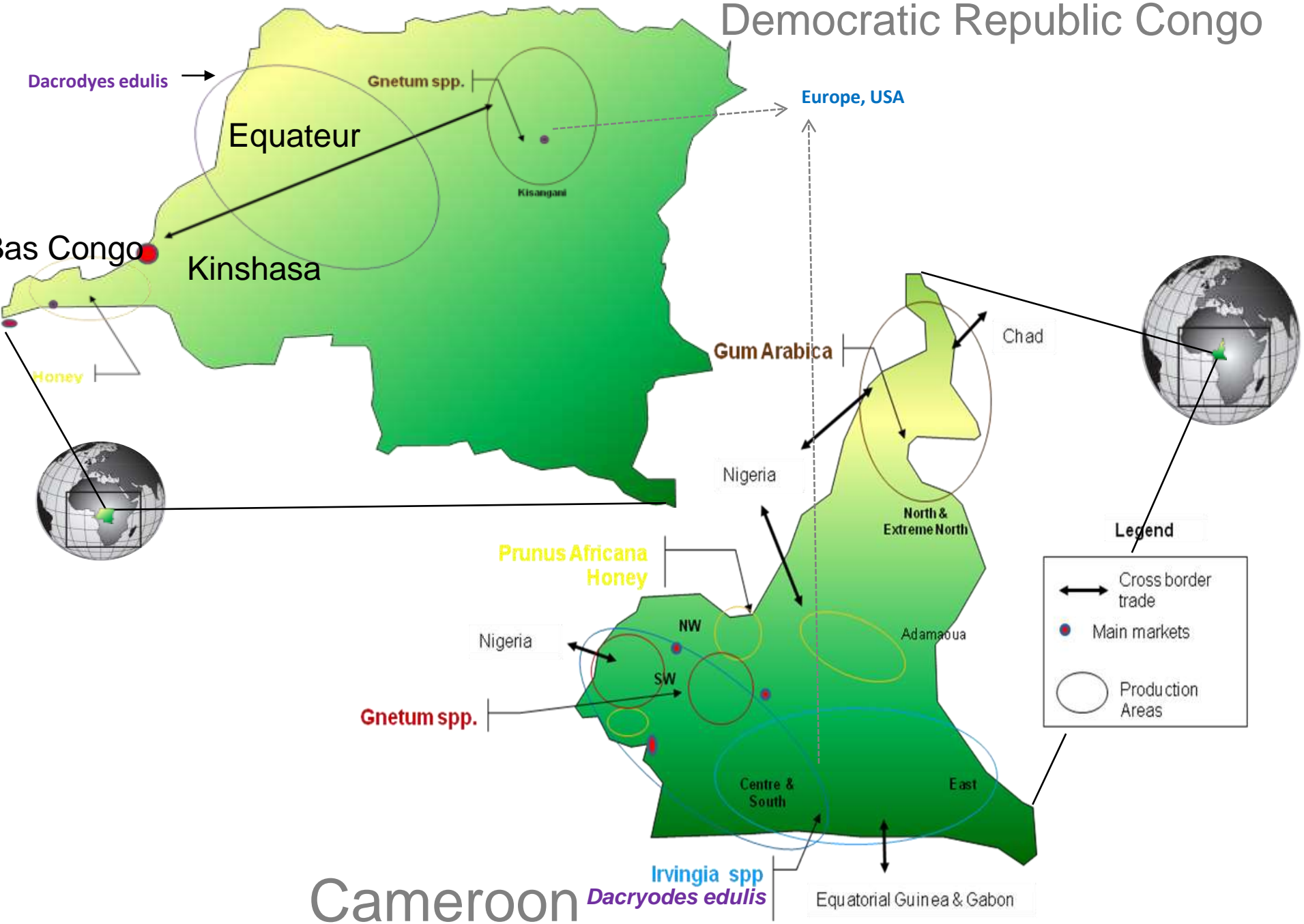
Analysis

- Data analysis SPSS and Excel
- Preliminary findings verified in meetings & peer cross-checked

Outputs

- Value chain maps; experimental representations & visualizations
- Reports
- Policy briefs & product sheets
- Booklet on doing sustainable SMFEs in NTFP value chains

Democratic Republic Congo



Dacryodes edulis

Gnetum spp.

Europe, USA

Equateur

Kisangani

Congo

Kinshasa

Honey

Gum Arabica

Chad

Nigeria

North & Extreme North

Legend

↔ Cross border trade

● Main markets

○ Production Areas

Prunus Africana Honey

Nigeria

NW

Adamaoua

Gnetum spp.

Irvingia spp.

Dacryodes edulis

Equatorial Guinea & Gabon

Cameroon



Eru
Gnetum spp.



Bush mango
Irvingia spp.



Safou



Dacryodes
edulis



Honey



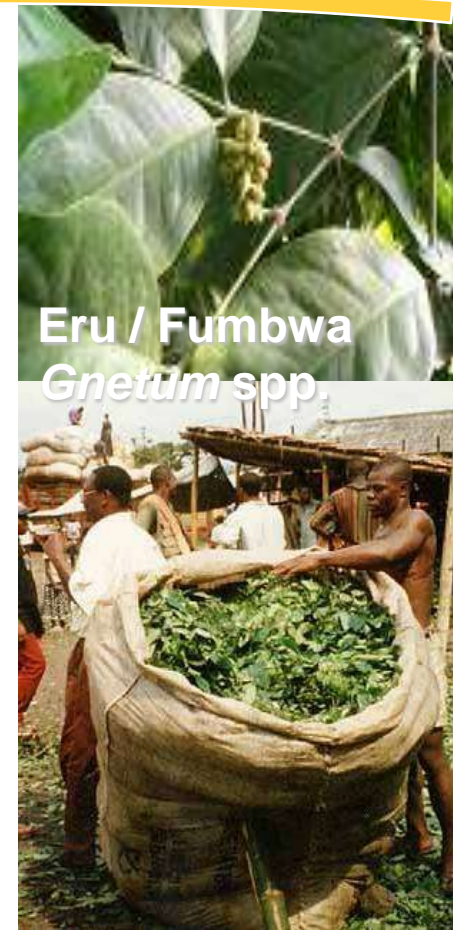
Apiculture
products



Prunus africana

Key findings

- NTFP trade informal, under appreciated, largely uncaptured in statistics & policy
- Positive impacts on forest based, rural & urban livelihoods
- Large and growing demand for NTFPs in rural, and especially, urban areas
- NTFPs play key role in food security, health and income to meet basic needs
- Largely a need-based trade not greed-based.....
- Level of organisation and efficiency of markets a function of local culture, product & location
- Lack of knowledge among actors about their chain
- Market information influences vertical integration
- Governance arrangements differ widely – big impact on income equity & distraction, access, control profit margins,
- Wide variances in sustainability of livelihoods and chains
- Level of domestication good sustainability indicator



Eru / Fumbwa
Gnetum spp.



Results

PRODUCTEURS
148 FC kg

DRC: Safou - *Dacryodes edulis*

850 t

MARCHE
493 t

AUTOCONSOMMATION
238 t

DONS
85 t

PERTES
34t

58%

28%

10%

4%

67%

33%

MARCHE LOCAL
Bas Congo

KINSHASA

DETAILLANTS
368 FC kg

GROSSISTES
135 FC kg

GROSSISTES
135 FC kg

DETAILLANTS
STABLES
272 FC kg

DETAILLANTS
AMBULANTS

998 t

273 t

4752 t

3362 t

568 FC kg

328 FC kg

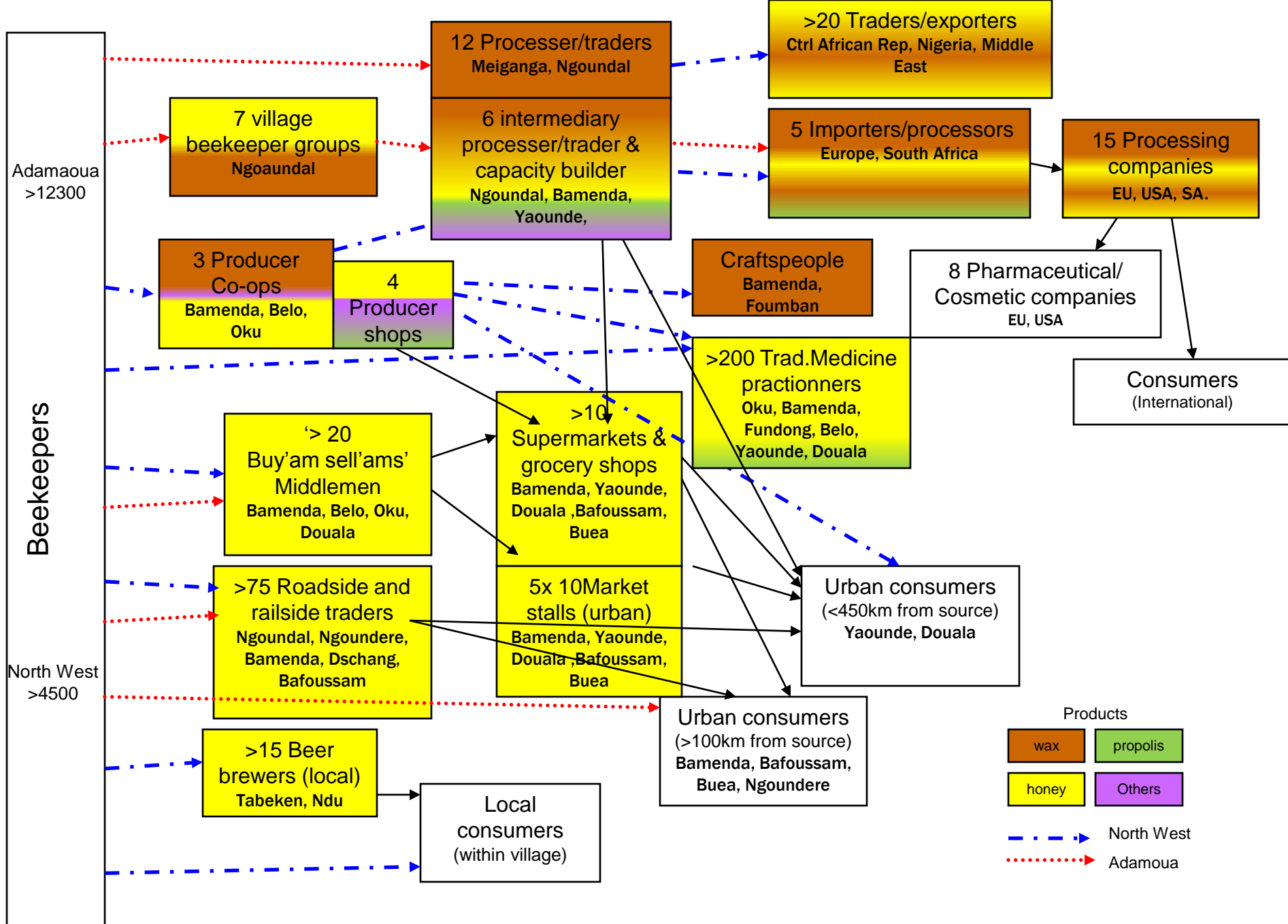
266 kg

372 FC kg

% Medicinal

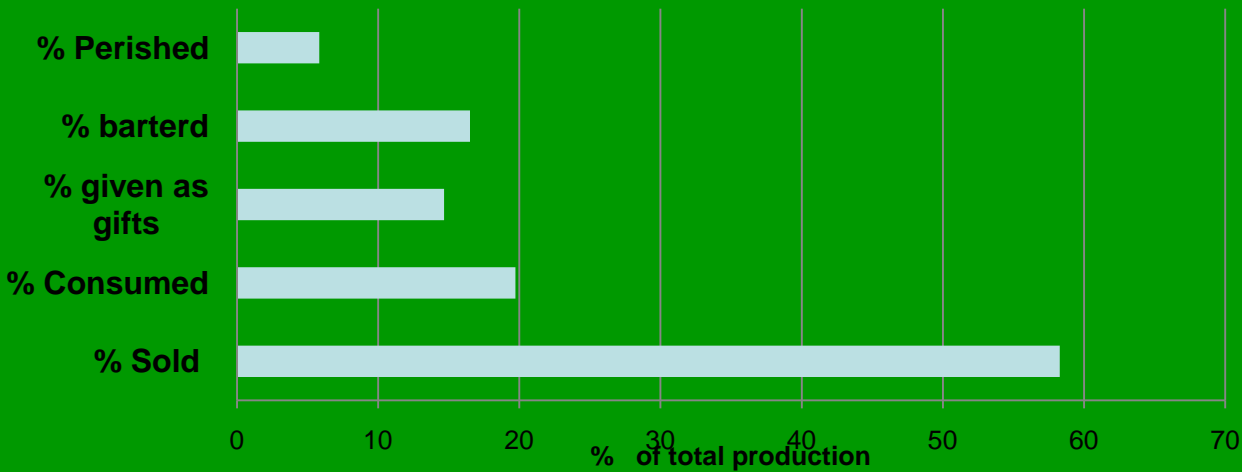
CONSOMMATEURS

Alimentation 95%

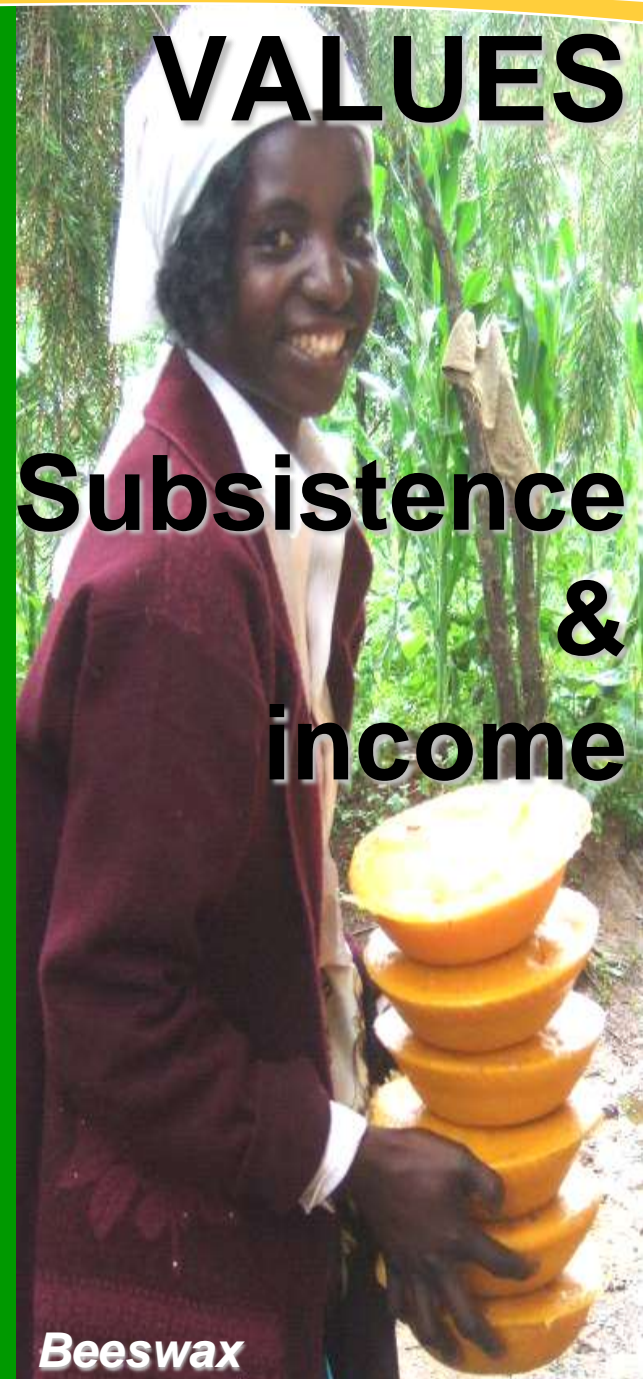
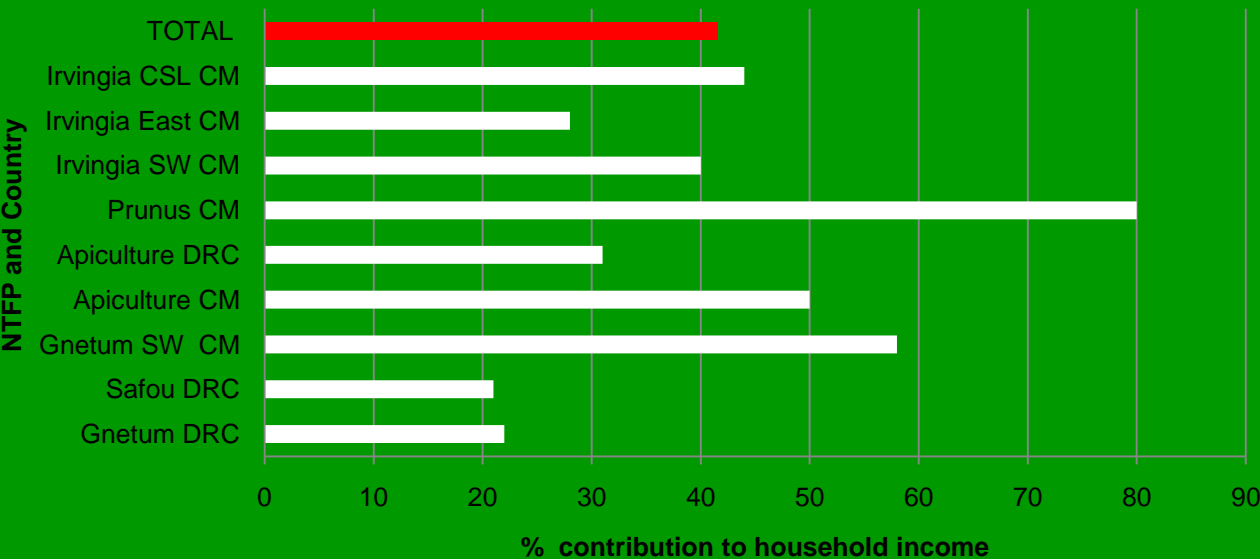


Cameroon apiculture value chains

How 5 NTFPs in Cameroon & DRC are used by harvesters



% contribution to producers household total income from NTFPs



VALUES

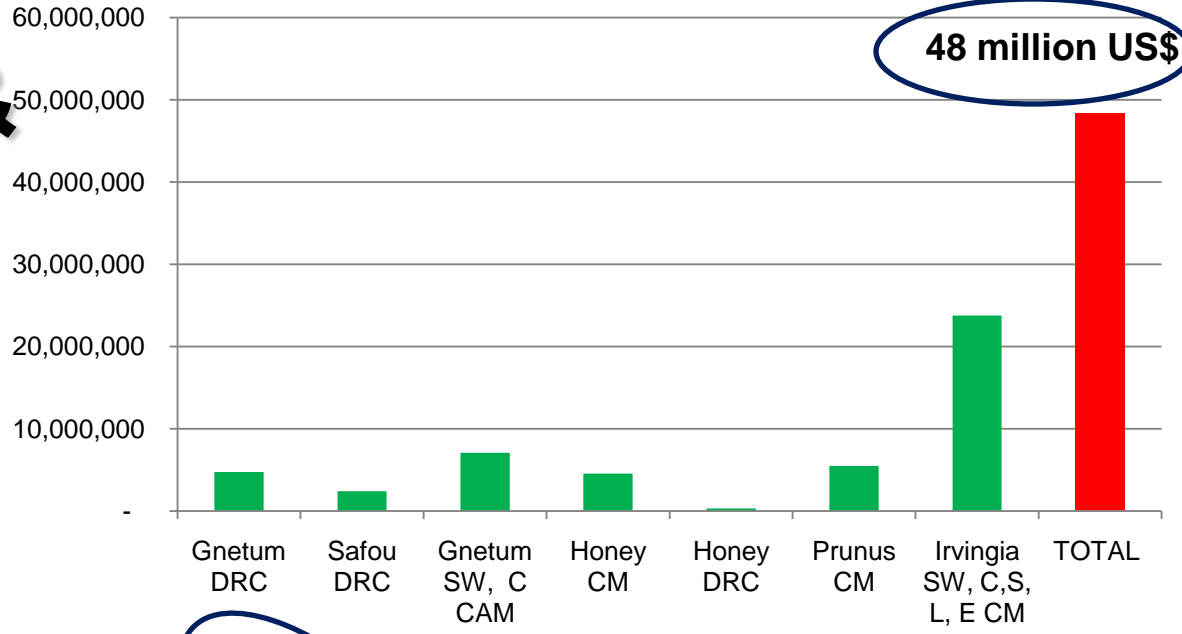
Subsistence & income

Beeswax

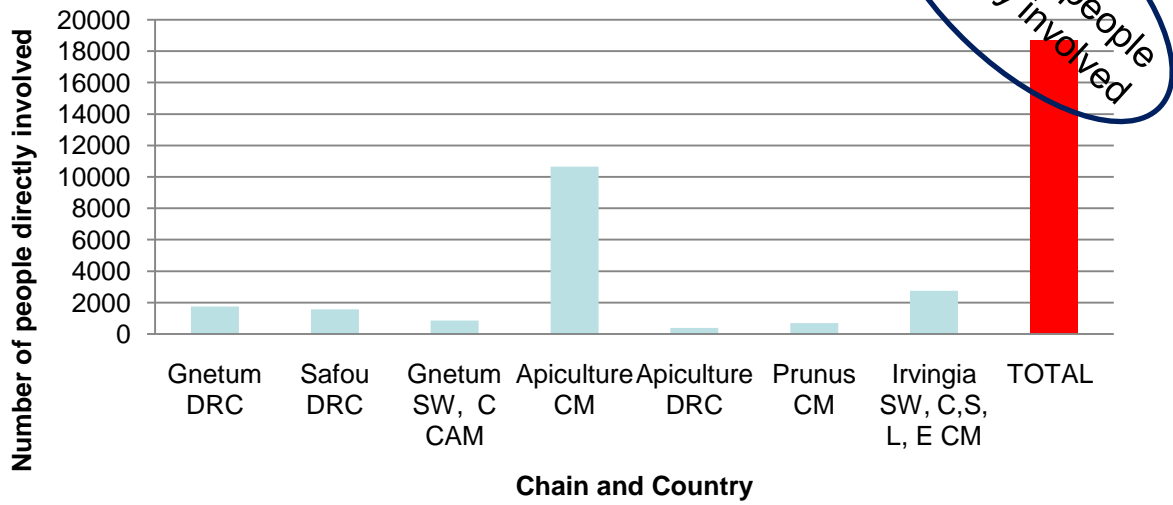
Livelihoods Employment & Production

>250,000 people indirectly involved...
Households, transporters...etc

\$ annual market chain sales 2007/2008



Numbers of direct actors in 5 regional NTFP market chains DRC & Cameroon

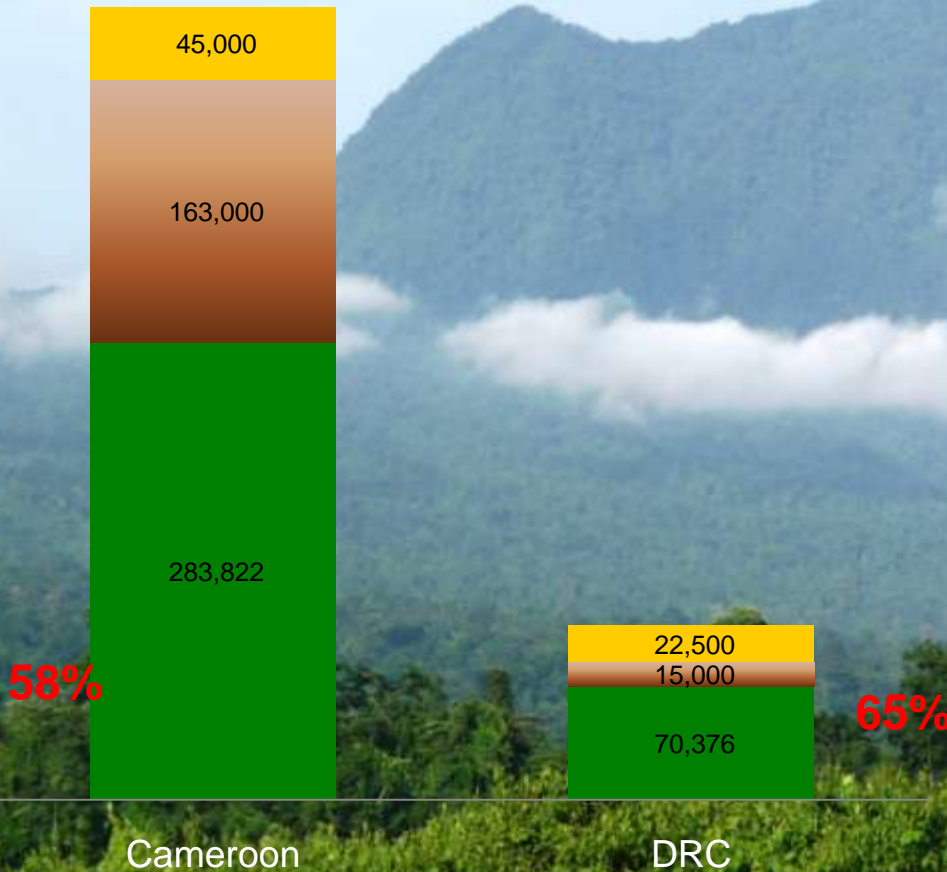


>20,000 people directly involved

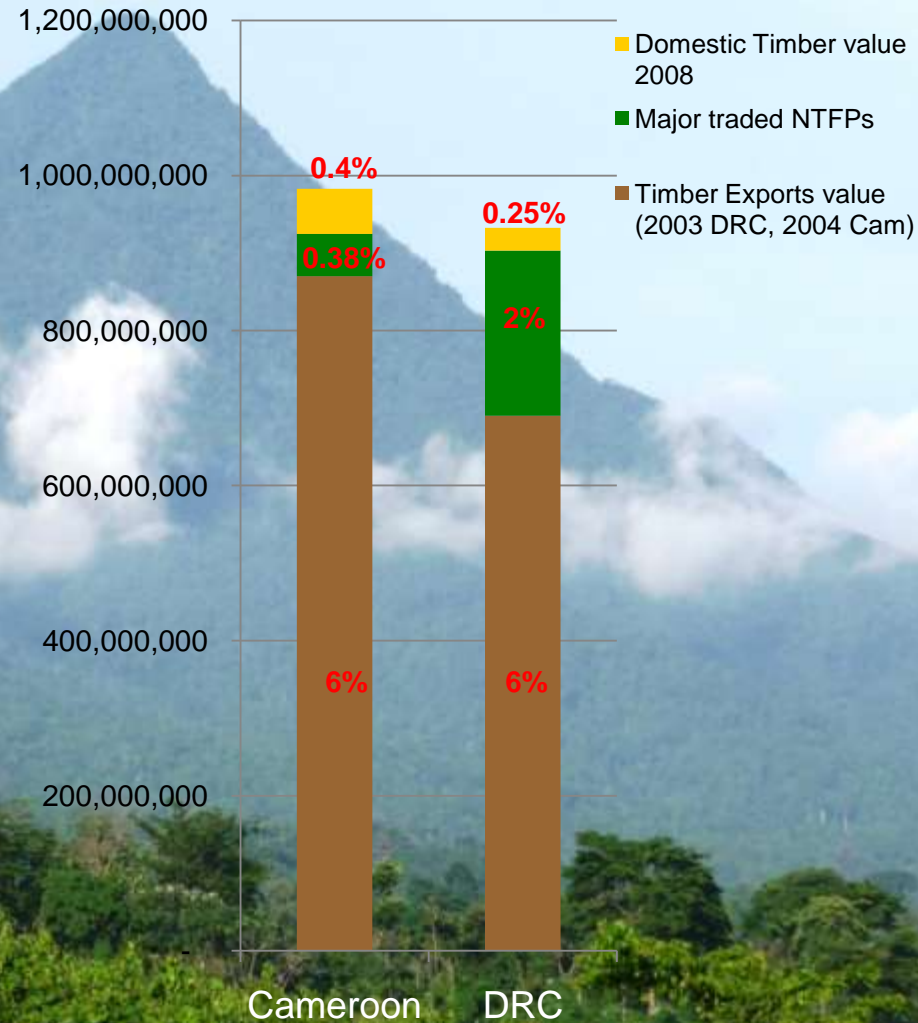


the tip of the canopy...?

Forest sector employment*
Export timber, domestic timber
and NTFPs



Forest products
contribution to GDP US\$



*Direct & indirect employment

15 NTFP species, export = 10 main timber

Costs



- Long term un-sustainability of chains e.g. 40% Gnetum & 70% Prunus unsustainably exploited
- Lack of knowledge on sustainable harvest techniques
- Domestication techniques exist but not widely known
- Unsustainable supply in the face of increasing demand and unsecure supply - not currently countered by regulation, governance or domestication policies.
- Inconsistent policies, agencies and regulation for different products
- Inefficient market information system
- → Low product added value due to lack of chain vision and low technology
- Informal 'taxes' = source of income but not equitable, are unpredictable and create unfavourable business climate

Opportunities & challenges

“Enlightenment” on the hidden values and costs.....

- Stakeholders open to participate in formulating policy options
- Policy and regulatory extremes and inappropriate legal framework ripe for rationalisation, simplification adapted to NTFP and SMFE context
- Tenure seen as key to secure sustainable exploitation
- Employment and profitability can be increased by securing and professionalising sector instead of criminalising
- Importance of business, infrastructure & technical support to facilitate operating environment for SMFEs & chains
- Processing, storage and value adding techniques/technologies offer enormous potential to increase profit margins
- Domestication is key to sustainable supply
- Sustainable harvest techniques do exist- need disseminating
- Market Information System trials and Platforms show positive results



Impacts

- Informed policymakers
- Awareness of chain among SMFEs and actors
- Exchange amongst chain actors - 2 platforms set up*
- Scientific & policy community informed of sustainability issues*
** ongoing*
- Higher producer prices: Market information system
- Input into revision of Cameroon Forestry Law on NTFPs
- NTFP value chain 'holistic' approach → global Forest Value Chain methodology



T'ank you plenty na!



On
mange
quoi?



La
forêt....

