FOREST SECTOR INFORMATION REPORT

Annual Review

2020

GUYANA FORESTRY COMMISSION

Table of Contents

Abbreviations

CARICOM	Caribbean Community
CFO	Community Forestry Organisation
CITES	Convention on International Trade of Endangered Species
COCA	Community Owned Conservation Area
ECLAC	Economic Commission for Latin America and the Caribbean
EU	European Union
FAO	Food and Agriculture Organisation of the United Nations
FCMS	Forest Carbon Monitoring System
FCPF	Forest Carbon Partnership Facility
FDI	Foreign Direct Investment
FLEGT	(European Union) Forest Law Enforcement, Governance and Trade
FoB	Free on Board Price
FPA	Forest Products Association
FPDMC	Forest Products Development and Marketing Council Inc.
FTCI	Forestry Training Centre Inc.
GDP	Gross Domestic Product
GFC	Guyana Forestry Commission
IEMI	Brazilian Market Intelligence Institute
IMF	International Monetary Fund
ITTO	International Tropical Timber Organisation
LCDS	Low Carbon Development Strategy
LUS	Lesser Utilized Species
MNRE	Ministry of Natural Resources and the Environment
MRVS	Monitoring Reporting and Verification System for REDD+
NGO	Non-Governmental Organisation
NTWG	National Technical Working Group for EU FLEGT
OPEC	Organization of the Petroleum Exporting Countries
PES	Payment for Environmental Services
REDD+	Reducing Emissions from Deforestation and Forest Degradation Plus
RL	Reference Level
SDMS	Space Data Management System
SFEP	State Forest Exploratory Permit
SFM	Sustainable Forest Management
SFP	State Forest Permission
TSA	Timber Sales Agreement
UNCTAD	United Nations Conference on Trade and Development
UNDP	United Nations Development Programme
UNFCCC	United Nations Framework Convention on Climate Change
VPA	Voluntary Partnership Agreement
WCL	Wood Cutting Lease
WEO	World Economic Outlook
WTO	World Trade Organisation

GLOSSARY OF TERMS	
Dressed Lumber	Wood sawn lengthways from Logs, further processed by use of planes, 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. Categories of Fuelwood are converted to Charcoal.
Non-timber Forest Products	All biological material, other than timber products, 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, or pressed with mechanical pressure.
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 Lumber	This includes Chainsawn Lumber and Lumber emanating from Portable Mills converted in the forest and declared at first point of declaration as Primary Lumber.
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	Dressed lumber, undressed lumber, sleepers and pallets.
Shingles	Squares of usually Wallaba (*Eperuafalcata*) wood used to construct roofs and for panelling purposes.
Spars	Saplings 15-25cm 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 8cm in diameter.

1. Introduction

The Forest Sector Information report focuses on the performance of the Forestry Sector in Guyana for the year 2020 with a comparison done with the year 2019. Production and export of various forest products based on Guyana Forestry Commission (GFC) data are assessed in comparison with the previous year's performance. Additionally, the Report compares summary averages of domestic and export prices and sector employment levels.

It continues with a summary of State Forest lands allocation across concession classes (with areas classified according to GFC designated use/size categories) for 2020 and the Forest Sector's contribution (as traditionally measured in official national statistics) to Guyana's real Gross Domestic Product (GDP) over the past four (4) years, using the new rebased and re-benchmarked series to year 2012.

Before addressing the Forest Sector in Guyana, a qualitative background summary, covering changes/features and outlook in the local and international economies, is provided. This Section includes developments in the International Tropical Timber Market with emphasis on the Latin America/Caribbean region.

In the core report, Production data compares the volumes of various forest products by product and species categories (where applicable), between 2019 and 2020, and across the Regions (as designated for GFC purposes, and corresponding to the three counties of Demerara, Berbic e and Essequibo), by their respective sub-divisions referred to as Forest Stations.

Export data is analyzed in terms of both volume and value for various product types. Detail analyses of destinational markets of Guyana forest products are outlined, along with international market prices.

The FSIR, further provides an Annex, with various tables, which allows for further interpretation of information given in the production and export section of the report.

2. Executive Summary

Log production of 299,504 m3, Roundwood of 26,389m3, Sawnwood totalling 38,863m3, along with Plywood of 6,889m3 all contributed to total forest production for 2020 of 371,688 m3. Other forest products harvested including Fuelwood (comprising of Charcoal and Firewood), Splitwood (Shingles and Paling Staves), Wattles, and Manicole Palm, were also produced in the year. Total production for 2020 increased by 4 % when compared to total production recorded for 2019 which was 357,207m3.

For 2020 Log production increased by 7.84% when compared to that of 2019. With the exception of Greenheart and Class 3 logs which recorded declined by 24% and 13% respectively, all other categories of logs recorded increase. Special Category Logs decreased also by 5.79%, was as a result of low production of Greenheart

Primary Lumber production registered a decline by 9.61% when compared to the corresponding period of 2019. Low production of Special Category Lumber from 10,290m3 in 2019 to 8,426m3 in 2020 was the main reason for this decline. An overall declined in Class 1 through Class 3 by 8%, 6% and 3% respectively, when compared to 2019, followed the above Special category decline. Plywood production of 6,889m3 produced in 2020 was 43.01% below compared 2019 production of 12,089m3.

For 2020, Roundwood production increased by 2% when compared to 2019. The leading cause of this increase was as a result of high production of Greenheart Piles (18,786m3) which was 11.99% above compared 2019 volume of (16,774m3). This was followed by increase in the production of Wallaba Poles which increased by 28.39% over the 2019 volume, all other Roundwood products recorded decline.

Total export value of Forest Products for 2020 was US$31.22M, a reduction by 15.54% as compared to that of the same period of 2019 when total export value was US$36.97M

In the export market, Logs export for 2020 fell by 18% in volume and followed by a 14.42% in value when compared to 2019. Sawnwood export also fell in both volume and value 16.21% and 18.15% respectively. Roundwood export also declined in 2020, both in volume and in value by 10.85% and 22.36%, respectively, when compared to 2019; in this category, the most improved product with respect to volume increased in 2020 compared to 2019 was Greenheart Piles. However, this product declined in both volume and value. Plywood export declined both in volume and value in 2020 when compared to 2019. At the beginning of 2020, Guyana's forest products were mainly exported to the six main regions namely, North America, South America, Asia Pacific, Latin American and the Caribbean, Europe and Africa. However, with the onset of the COVID pandemic, all export to these markets was halted.

3. International Forestry Environment

3.1 International Tropical Timber Market Summary

According to ITTO, the COVID-19 pandemic has had a drastic impact on tropical timber trade, with log exports plummeting by 28% in 2020 and Sawnwood and plywood down by 16% and 8%, respectively, according to preliminary findings of a report presented by the ITTO Secretariat during the Council session. ITTO's Biennial Review and Assessment of the World Timber Situation provides data on the production and trade of tropical forest products and the status of tropical forests in ITTO member countries, as well as an overview of production and trade statistics for all timber products in these countries.

Further, a ITTO survey in early 2020 in nine tropical countries which together account for over 50% of the world trade in tropical primary wood products on the impacts of the pandemic contends that measures taken to prevent the spread of COVID-19 were having substantial impacts on the tropical timber sector, with thousands of workers laid off and demand plummeting. A common concern was about when demand for tropical timber might recover, the prospect of which is closely linked to the speed of economic recovery in major importing markets.

ITTO noted that forests, particularly in the tropics, had suffered a wide range of negative impacts, including a decrease in market demand for forest products, which were especially affecting small and medium-sized forest enterprises. Nevertheless, economic pundits recognized that the crisis was also creating opportunities, including a chance to increase the use of wood as a substitute for non-renewable, high-carbon-emitting materials and energy.

The report noted that the COVID-19 crisis had disrupted global supply chains, exposing timber exporting countries fragility and suggesting a need to strengthen local supply chains and markets and encourage local innovations to ensure the sustainability of forest-based enterprises. The pandemic was reinforcing the vital role played by indigenous peoples, smallholders and local communities in food production and nature protection. In its interventions, ITTO stressed that efforts to overcome the pandemic in the short to medium term should focus on SFM, governance and incentives to ensure a steady supply of wood and other forest goods and services for sustainable domestic and international consumption. Long-term commitments on SFM and forest landscape restoration need to be enhanced with fiscal or financial incentives and market access to stimulate and ensure sustainable bio economies, which in turn would strengthen community resilience and thereby help maintain the crucial role of forests in climate-change mitigation and adaptation.

3.2 The Guyana Forest Sector

The outbreak of Covid-19 presented the Guyana forest sector with evolving challenges, causing limitations in forests management activities and affecting the entire forest value chain.

Forest management activities by the GFC continued during the lockdown and were authorised with requisite security and sanitary measures in place, such as the application of social distancing, minimum number of persons in a vehicle, individual visits to forest sites and usage of protective masks. Further only essential work in the forests was carried out, ranging from work from monitoring to ensure that SFM protocols were being complied with, while at the same time maintaining the supply to essential markets.

The 2020 lockdown brought a slow-down in forest management activities across the entire Guyana. Throughout the three counties, Demerara, Essequibo, and Berbice, forest activities were subject to direct restrictions of various national measures instituted by government and community management associations.

The impact of lockdowns to mitigate the pandemic has had significant sectorial impacts. Production and export of forestry products experienced immediate impact from lockdowns, which stemmed from reduced hours worked and job losses.

Impact of COVID-19 on Production

Monthly Production Comparison			
Month	2019	2020	% Change over 2019
Jan	20,499.96	15,900.02	- 22.44 %
Feb	30,312.06	27,850.53	- 8.12 %
Mar	27,899.58	19,237.02	- 31.05 %
Apr	32,555.97	22,685.56	- 30.32 %

2019 Production by Land Owners				
Land	Jan	Feb	Mar	Apr
Agriculture Lease	-	-	39	-
Amerindian Reservation & Private Property	5,099	7,692	4,191	6,375
Compounding	449	187	367	573
State Land	14,952	22,432	23,302	25,608
Grand Total	20,500	30,312	27,900	32,556
2020 by Land Owners				
Land	Jan	Feb	Mar	Apr
Agriculture Lease		-	-	-
Amerindian Reservation & Private Property	4,117	8,901	3,384	4,085
Compounding	288	412	138	314
State Land	11,495	18,537	15,715	18,286
Grand Total	15,900	27,851	19,237	22,686
% Change in Land Production over 2019	-22%	-8%	-31%	-30%

Disruptions in trade and global supply chains have had effects on the sector even before lockdowns were extended. Inability of exporters to meet international market demand coupled with downturn in the Asian and European market will continue to further impact export of forest products.

		Export Values				
Year	# of Exporters	Jan	Feb	Mar	Apr	Jan-Apr Total
2019	117	2,584,277	3,321,621	3,241,117	3,420,033	12,567,048
2020	86	2,291,916	2,618,344	2,418,940	1,811,741	9,140,942
	-26%	-11%	-21%	-25%	-47%	-27%

3.3 Community Development

At the beginning of the year, CFOs and indigenous communities involved in logging are encouraged to submit in writing their interest in training for the current year. This information is used to determine what training the Community Development Unit and FTCI will offer to CFOs and Indigenous communities. Availability of funding is critical for the implementation of any training activity, and the majority of funding was sourced externally.

Participants at the GFC/FCPF-REDD+ Symposium on Ensuring Sustainable Livelihood for Forest Dependent Communities in Anna Regina, February 17, 2020

a. ***Training with GFC***

With financial support of the FAO/EU FLEGT VPA programme, awareness sessions were initiated with Amerindian Villages involved in commercial logging through the project: "*Improving FLEGT readiness of 23 Indigenous communities through increased awareness of related regulations.*" GFC is implementing the project in collaboration with EPA, NIS, GRA, and Ministry of Labour; it is aimed at improving compliance with Income Tax, Social Security and Labour Regulations. .

b. Additionally, training on Administrative management and Financial accounting was done with members of some Associations at the Yarrowkabra Training Center

Interagency collaboration

In 2020, GFC collaborated with several agencies to achieve common goals. Among these are:

Ministry of Amerindian Affairs

The Ministry's endorsement of the projects involving Amerindian Villages informed GFC's engagement. The Ministry provided critical information pertaining to Amerindian communities that are affected by Coronavirus and outlined the local protocols that must be observed when visiting the communities. Additionally, the Ministry influenced the mode of the delivery, content of the training materials and affirmed its dedication to the successful implementation of the project by assigning a representative to participate on the project steering committee.

Department of Environment

The project, '***Strengthening technical capacities to mainstream and monitor Rio Convention implementation through policy coordination'*** is being implemented by the Department of Environment and is being funded by the Global Environment Facility (GEF), United Nations Development Programme (UNDP). The project is aimed at mainstreaming the three conventions United Nations Convention on Biological Diversity (UNCBD), United Nations Framework Convention on Climate Change (UNFCCC) and United Nations Convention to Combat Desertification (UNCCD); under the four components:

1. Institutional capacities for mainstreaming and monitoring;
2. Technical capacities for mainstreaming and monitoring;
3. Awareness of global environmental values;
4. Updating of the National Capacity Self-Assessment

. Among the key activities of the project is the upgrading of key technological needs of government structures and other stakeholders.

The GFC is a Senior Beneficiary on the Project Board. Its primary function is to ensure the realization of the project results from the perspective of the project beneficiaries.

The project achieved a significant portion of its activities during 2020 and was granted an extension due to the disruption of its activities due to coronavirus. The Community Development Unit participated in a number activities: capacity building exercises, review of documents produced by various consultants, attending Editorial Committee and Board of Directors meetings.

Department of Social Protection – This was mainly aimed at following up on incorporation of CFOs as Cooperative Societies. During 2020, through increased collaboration, a number of CFOs were engaged regarding their registration and audit. This collaboration continues to improve GFC's effectiveness in guiding the groups' administrative management and also resulted in fourteen (14) groups completing their registration as Co-ops.

Forest Carbon Partnership Facility (FCPF) Programmes –Through the Ministry of Natural resources, two symposiums were held to explore with CFOs, state agencies and other partners, sustainable livelihood activities for forest-dependent communities. Seventy-five percent (75%) of CFOs attended these sessions and provided detailed inputs on how they see themselves advancing from solely dependent logging to other viable economic activities. Substantively, a key component of the discussion is focused on value added production.

4. Contribution to GDP

In 2010, the Bureau of Statistics introduced a new series of Gross Domestic Product rebased and re-benchmarked to year 2006, replacing the series based in 1988. The table below shows the trend of GDP over the past 9 years. This statistic is taken as a measure of primary production of Logs, Sawnwood, Roundwood and Splitwood. As such, total forest sector contribution that included added value forest products, (including plywood, furniture, and building components, etc.) tally to a higher percentage contribution. This additional aspect of forest sector contribution is recorded under the Manufacturing sector.

GDP at Constant 2012 Basic Prices (G$M)				Forestry's Sub Sector Contribution to:	
Year	GDP	Agriculture Sector	Forestry Sub Sector	GDP	Agriculture Sector
2010	749,742	198,283	20,225	2.70%	10.20%
2011	788,711	203,938	18,835	2.33%	9.00%
2012	830,326	211,234	17,554	2.11%	8.31%
2013	860,661	219,803	18,517	2.15%	8.42%
2014	875,176	236,671	21,473	2.45%	9.70%
2015	881,192	244,364	19,060	2.16%	7.80%
2016	914,743	217,221	14,040	1.53%	6.46%
2017	948,904	244,734	15,224	1.60%	6.22%
2018	991,044	260,963	15,430	1.56%	5.91%
2019	1,044,093	259,670	14,821	1.42%	5.71%
2020	1,498,061	270,445	13,614	0.90%	5.03%

5. Forestry Sector Structure

5.1 Land Allocation Breakdown

Small Concessions commonly referred to as State Forest Permissions (SFPs) operations were extended from 2 years to 3 years for an area no more than 8,097 ha; Large Concessions (usually referred to as Timber Sales Agreements (TSAs) are granted for a period up to 30 years for an area in excess of 8,097 ha. All leases are renewable subject to compliance with the terms of the agreement. State Forest Exploratory Permits (SFEPs) are granted for 3 years and is the precursor to a TSA and WCL.

Forest Classification as at 2020

CLASSIFICATIONS	COUNT	Area (Hectares)	Total Allowable Cut (m3)	% Total Allocation
PRODUCTION LANDS ending December 2021				
Small concessions	549	2,319,408.00	1,254,618.57	44.6%
AL and ML	10	11,384.00		0.2%
State Exploratory Permits (SFEP)	5	728,727.31	143,869.00	14.0%
Large Concessions	17	2,125,975.91	448,193.25	40.9%
Total Production Area Allocated	**581**	**5,185,495.22**	**1,846,680.82**	**100.0**
PERMANENT RESEARCH AND RESERVES				
GFC Forest Reserves	12	17,924.92		
Total Forest Allocated		5,203,420.140		
Unallocated State Forest		7,362,579.86		
Total State Forest		**12,566,000**		
Iwokrama	1	371,681.00		
Kaieteur National Park	1	61,091.34		
Other (Shell Beach, Kanuku)	2	730,300		
Total area size of Protected Area		**1,163,072.34**		

6. Other Sector Licences

Sector activity licences are valid for one (1) calendar year only; continued activity at these operations requires annual renewals.

Licenses Issued 2019&2020

License Type	Year	Demerara	Berbice	Essequibo	Northwest	Total
Timber Dealer Export	2020	35	19	5		**59**
	2019	41	24	8		**73**
Import	2020	15	2			**17**
	2019	7				**7**
Consolidated Log Export	2020	14	1	1		**16**
	2019					
Lumber Yard	2020	84	34	24	3	**145**
	2019	92	33	21	2	**148**
Timber Dealer No Storage	2020	4	4	6	1	**15**
	2019	3	3	6		**12**
Sawpit License	2020	54	45	101	20	**220**
	2019	66	53	100	21	**240**
Sawmill License	2020	98	35	71	2	**206**
	2019	91	37	63	3	**194**
Firewood License	2020	4	4	5		**13**
	2019	4	5	8		**17**
Charcoal License	2020	38	3	1	3	**45**
	2019	41	3	0	2	**46**
Timber Depot	2020	24	27	6		**57**
	2019	25	26	7	1	**59**
Timber Path	2020		3	2		**5**
	2019		3	2		**5**
Permit to Erect	2020	22	4	9		**35**
	2019	13	2	14		**29**
Total	**2020**	**392**	**181**	**231**	**29**	**833**
	2019	**383**	**189**	**229**	**30**	**830**

7. Production

The Production Table below shows the production level for various forest products over the 2020 review period as compared to their 2019 levels. In this section production volume for timber products are outlined. Total production for Timber (not including Plywood and Veneer) for 2020 was 371,688m3 and this is 4% higher than that of 2019 when the volume reported was 357,207m3

Table 1: Forest Sector Production 2020

GUYANA FORESTRY COMMISSION					
Table 1: Total Production for Dec 2020 Compared to Dec 2019					
			Jan-Dec 2020	**Jan-Dec 2019**	**[1] % Change**
PRODUCTS		Unit	**Total**	**Total**	***over* Jan-Dec '19**
TIMBER PRODUCTS					
Logs		m^3			
Special Category					
	Greenheart		49,136.29	64,536.04	(23.86)
	Purpleheart		19,127.17	8,924.15	114.33
	Others		5,023.83	4,334.70	15.90
	Total Special Categor		**73,287.29**	**77,794.89**	**(5.79)**
Class 1			136,688.20	114,175.90	19.72
Class 2			61,570.05	53,583.76	14.90
Class 3			27,958.84	32,186.04	(13.13)
	Total Other Class Lo		**226,217.09**	**199,945.70**	**13.14**
Total Logs			**299,504.38**	**277,740.59**	**7.84**
		m^3	-	-	
Greenheart Piles			18,786.51	16,774.76	11.99
Kakaralli Piles			779.06	1,438.09	(45.83)
Wallaba Poles			4,919.05	3,831.40	28.39
Posts			1,759.52	2,147.85	(18.08)
Spars			145.20	158.46	(8.37)
Total Roundwood			**26,389.35**	**24,350.56**	**8.37**
Primary (Chainsaw)		m^3	-	-	
Special Category			-	-	
	Greenheart		3,235.60	5,183.98	(37.58)
	Purpleheart		2,860.85	2,290.48	24.90
	Others		2,329.76	2,815.96	(17.27)
	Total Special Cat. Lu		**8,426.21**	**10,290.42**	**(18.12)**
Class 1			19,600.73	21,275.31	(7.87)
Class 2			6,419.40	6,863.05	(6.46)
Class 3			4,417.41	4,568.29	(3.30)
	Total Other Class Lu		**30,437.54**	**32,706.65**	**(6.94)**
Total Primary Lumber			**38,863.75**	**42,997.07**	**(9.61)**
Splitwood		m^3	-	-	
	Paling Staves		40.96	29.71	37.86
	Vat Staves		-	-	-
	Shingles		-	-	-
Total Splitwood			**40.96**	**29.71**	**37.86**
Fuelwood	Charcoal	m^3	6,642.62	8,747.75	(24.06)
	Firew ood	m^3	20,787.71	17,503.40	18.76
Total Fuelwood		m^3	**27,430.33**	**26,251.15**	**4.49**
Plywood		m^3	**6,889.74**	**12,089.81**	**(43.01)**
NON - TIMBER FOREST PRODUCTS			**-**	**-**	
Wattles		pieces	**430,906.00**	**310,596.00**	38.74
Manicole Palm		pieces	**3,855,139.00**	**4,053,065.00**	(4.88)

Source: GFC Database

7.1 Production Volumes

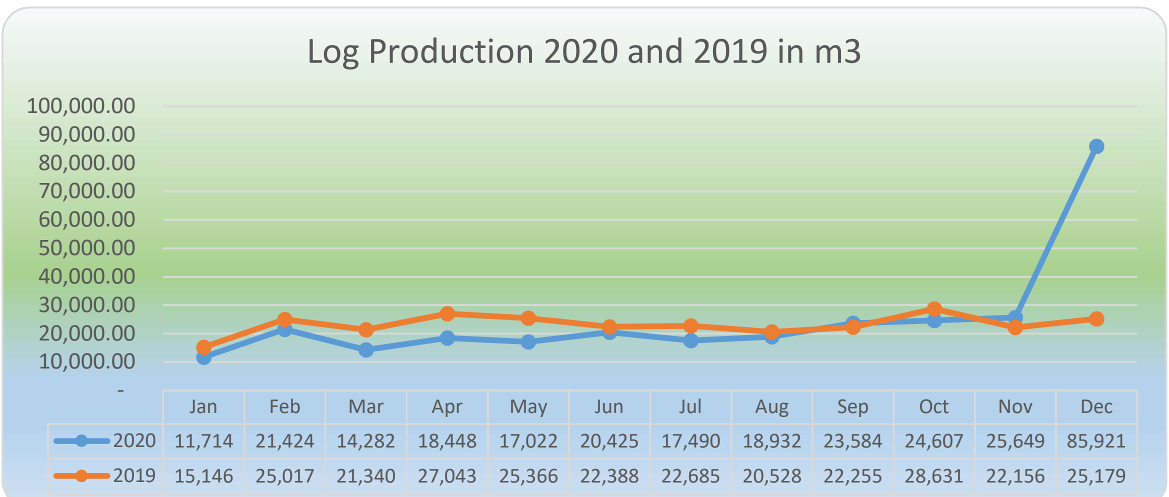
Table 4 presents production volumes for various primary Timber and Non-Timber forest products, together with Plywood, for the Year 2020 compared to 2019.

7.1.1 Log Production

The graph below compares monthly log production for the years 2020 and 2019. Log production for the period January to December 2020 is 299,504m3 which when compared to the same period of 2019 for which production was 277,740m3; there was an increase of 7.84%. The graph shows similar monthly fluctuations in both 2020 and 2019.

GFC data shows that the top ten (10) harvested species during 2020 were: Greenheart, Wamara, Kabukalli, Baromalli, Purpleheart, Wallaba, Shibadan, Tauroniro, Simarupa, and Mora. With regards to the various Classes of logs, the data shows that the Class 1 logs (110,835m3) along with Special Category Purpleheart Logs (25,242m3) are harvested in the highest quantities.

Figure 1: Monthly Trend of Log Production



7.1.2 Log Production by GFC Reporting Divisions and Forest Stations

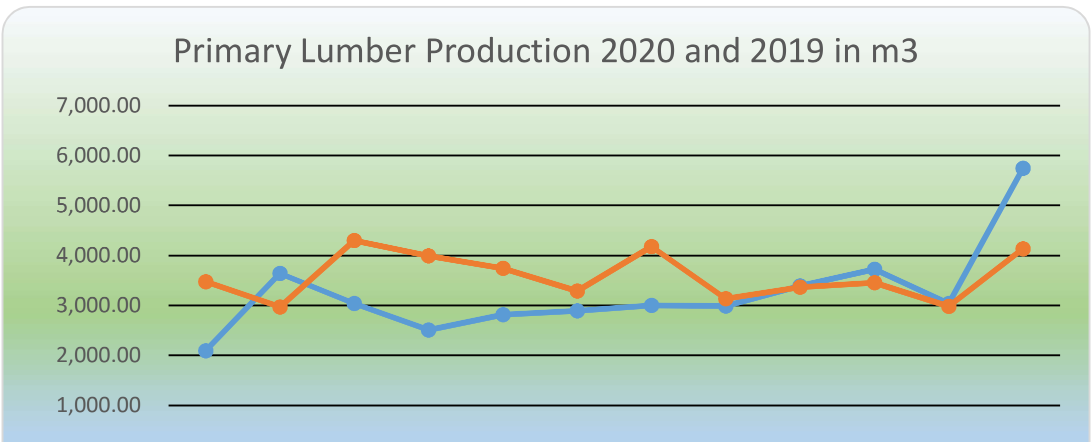
Of the total volume of Logs produced, 80,227m3 or 27% came from the Essequibo Division, of which the most production of logs came from Parika Station. This station accounted for approximately 11% of total logs harvested. This was followed by production coming from Supenaam and Port Kaituma with 4% and 3% respectively of national production. In the reporting Division of Berbice, the majority of Logs produced were declared at Kwakwani (27%), Springlands and Canje with 9% and 6% respectively. For production coming from the Demerara Division, the majority of Logs produced were from Soesdyke (16%) Linden (13%) and

Georgetown (8) of total Logs produced in 2020.

7.2 Lumber Production

Production of Primary (Chainsawn) Lumber for 2020 was 38,863m3 or 9.61% below the previous year production of 42,997m3. The Graph below shows the monthly trends in Lumber production for the year 2020 and 2019. Total Sawnwood produced over the review period, although lower in comparison to that produced in 2019, reveals a consistent trend with production being above the 2,500m3 mark in all cases except for the slow start in January. However, the consistent growth was still below the production level of 2019. In 2020, the top ten species of lumber were Kabukalli, Wallaba, Greenheart, Tauroniro, Purpleheart, Mora, Bulletwood, Kereti, Simarupa, and Shibadan.

Figure 2: Monthly Trend in Primary Lumber Production



	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
2020	2,094	3,638	3,036	2,506	2,812	2,891	2,998	2,986	3,391	3,725	3,037	5,743
2019	3,471	2,970	4,299	3,990	3,742	3,287	4,176	3,132	3,362	3,452	2,978	4,135

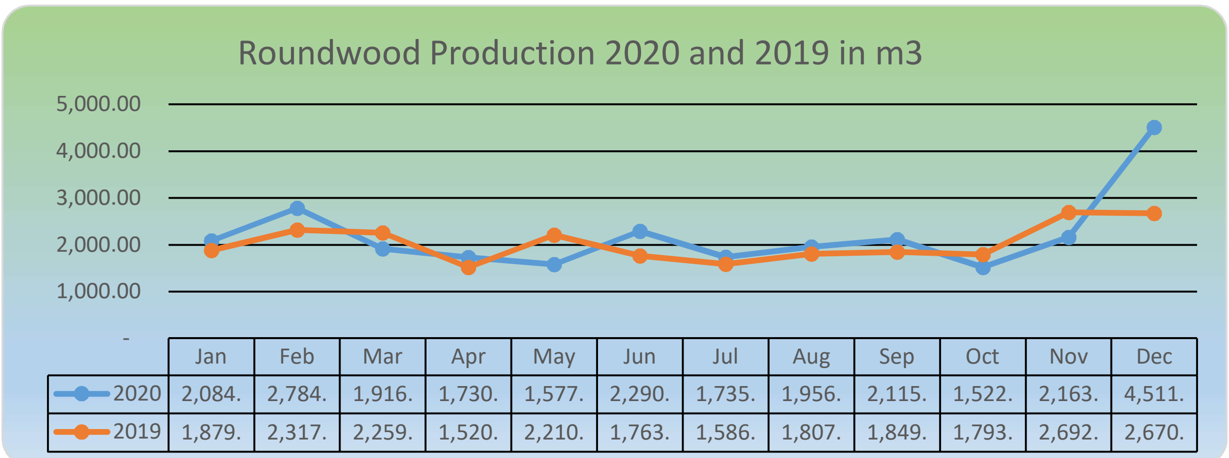
7.2.1 Primary Lumber by GFC Reporting Divisions and Forest Stations

For the year 2020, most of the primary lumber extracted were recorded in the Demerara Division in the sum of 20,343m3, which accounted for 52% of national volume. This was followed by production from the Essequibo Division with 12,634m3 and accounting for 33% of national volume. The remaining 5,884m3 of Sawnwood produced came from the Berbice Division which accounted for 15% of total production.

7.3 Roundwood Production

Production of Piles, Poles, Posts, and Spars constitute the product category of Roundwood. Piles produced were mainly of the Greenheart species with few being Kakaralli, While Poles, Posts, and Spars produced were derived from the Wallaba species.

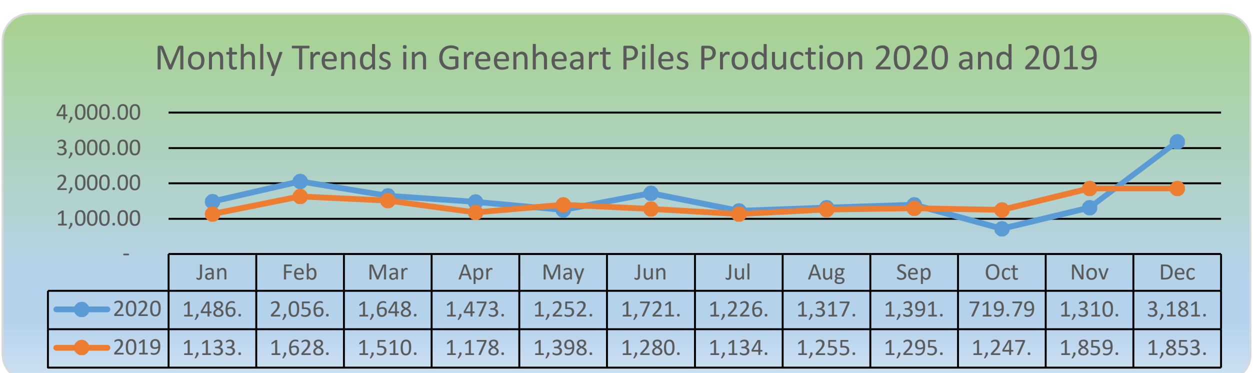
Figure 3: Monthly Trend in Roundwood Production



The above graph represents the total production of Roundwood for 2020 and is compared to production volume of 2019. It also presents the production trends across the various months of the years compared.

For 2020, total Roundwood produced was 26,389m3, and represents an increase by 8.37 when compared to Roundwood volumes recorded in 2019

Figure 4: Monthly Trend in Greenheart Piles Production



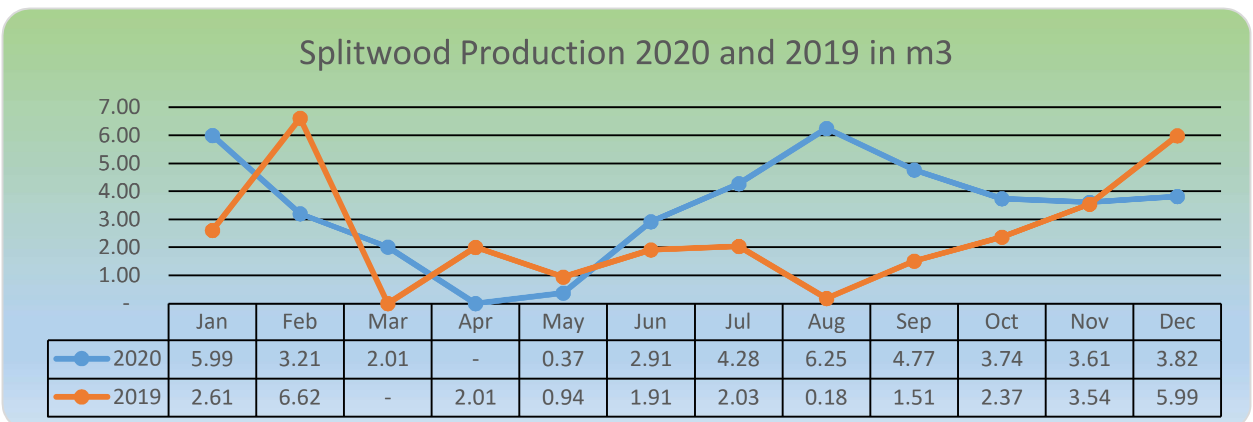
The graph above gives a visual representation of the trends in the production of Greenheart Piles. Over the review period of 2020, production of Greenheart Piles remains relatively stable at an average production of 1,565m3. Within the review period, the lowest quantity of Greenheart piles was recorded in October with a total of 719m3, whereas the highest production was recorded in December with a total volume of 3,181m3. Greenheart Piles accounts for the largest percentage share of the Roundwood category. During 2020, these Piles accounted for approximately 71% of all Roundwood produced, thus making this product heavily influential on the production trend lines.

7.4 Splitwood Production

Splitwood refers to Staves (both Paling Staves and Vat Staves), and Shingles (non-machine made), all of which are usually produced from the Wallaba species.

During 2020, a total of 40.96m3 of Splitwood were produced. This reflects an increase in Splitwood 2020 production by 37.86% when compared to volumes reported in 2019. The increase in Splitwood is mainly attributed to the increase in volumes of Paling Staves, which was the lone Splitwood product produced for 2020.

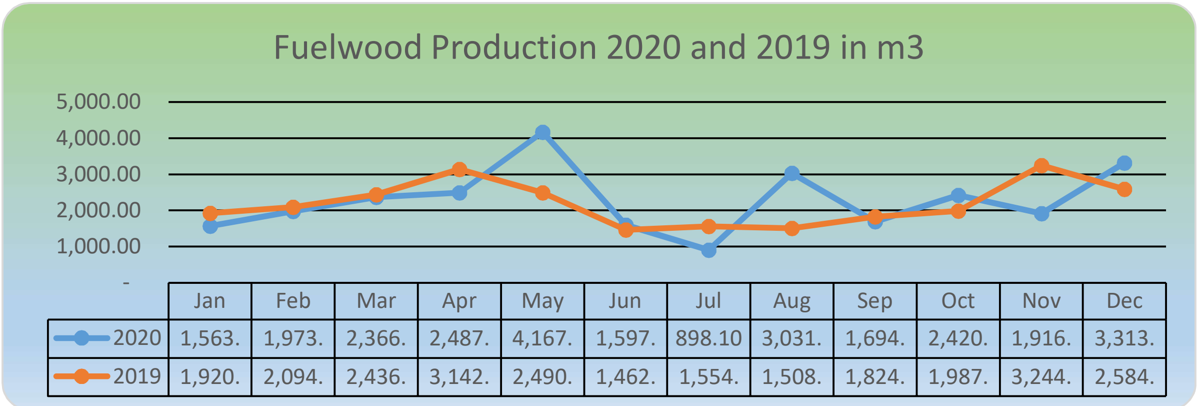
Figure 5: Monthly Trend in Splitwood Production



7.5 Fuelwood Production

Two products are included under this category namely, Charcoal and Firewood. The graph below compares the production of Fuelwood volumes for 2020 with that of 2019 across the various months.

Figure 6: Monthly Trend in Fuelwood Production



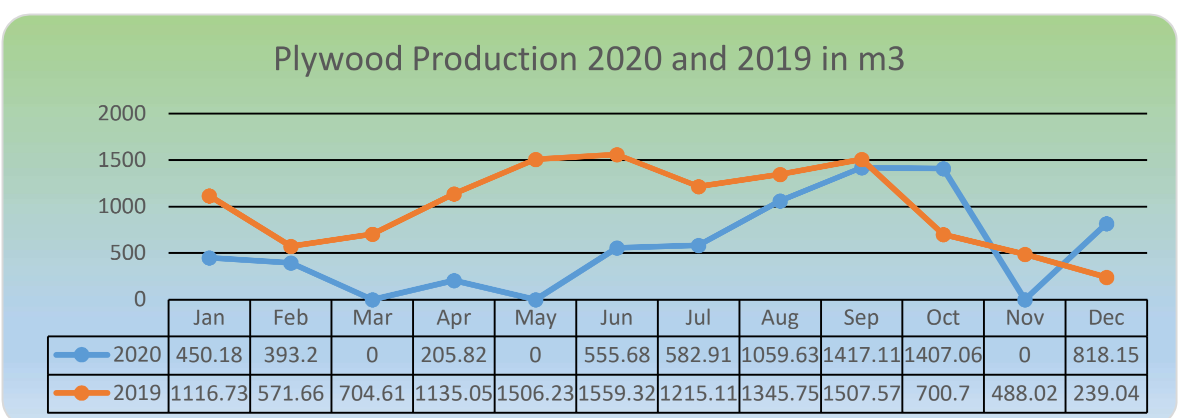
Over the review period, Fuelwood production saw an increase by 4.49% when compared to 2019 production volume. This is primarily owing to the increased demand for Firewood. As can be seen in the chart above, total Fuelwood production in 2020 was generally above comparative 2019 volumes.

Volumes of Charcoal produced in 2020 recorded a decrease by 24.06% when compared to the 2019 production figures. For 2020, total Charcoal produced accounted for 24% of total Fuelwood as compared to the 33% in 2019. On the other hand, Firewood production maintained an overall consistent volume in production for 2020 as compared to that of 2019, it maintained the higher percentage share of this category and accounted for 76% of total Fuelwood produced.

7.6 Plywood Production

Plywood production for 2020 decreased by 43.01% when compared to the corresponding period of 2019. Over the reviewing period, the production trends for Plywood revealed a diminishing trend of production as to what was produced the previous year.

Figure 7: Monthly Trend in Plywood Production



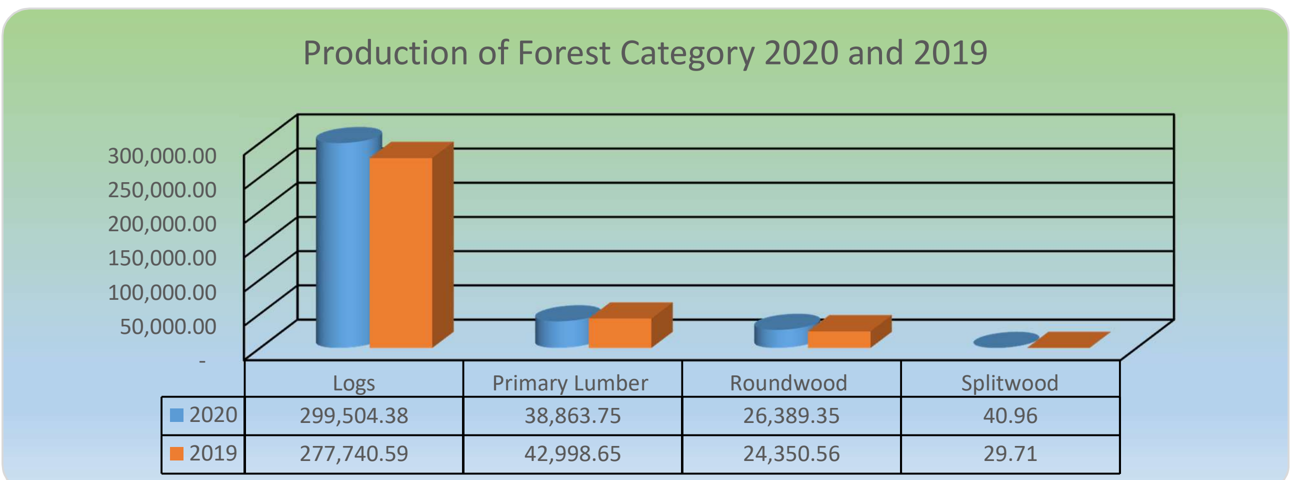
7.7 Non Timber Forest Products

Non-Timber Forest Products (NTFPs) refer to a variety of products other than primary and secondary timber products derived from forest resources. These comprise of Wattles, Manicole Palm, Mangrove Bark, Palms and Latex (Balata). In 2020, Manicole Palm (Heart of Palm) totalled 229,831 pieces in 2020, representing a decrease of 33.31% when compared to that of 2019 total volume of 344,647 pieces. Production level of 80,245 pieces of Wattles was recorded in 2020.

7.8 Comparative Production Volume Analysis

The Graph below illustrates the general trend of forest production by product category. Over the review period with the exception of Primary lumber, which quantity recorded a decrease, all other products recorded increases when compared to 2019.

Figure 8: Forest Product Production by Categories



	Logs	Primary Lumber	Roundwood	Splitwood
2020	299,504.38	38,863.75	26,389.35	40.96
2019	277,740.59	42,998.65	24,350.56	29.71

8. Employment and Domestic Price

Table 2: Forest Sector Employment Estimates

Activity	2019	2020	% Change
Logs	10,637	10,769	0.01
Sawmilling	4,672	4,210	(0.10)
Timber Dealership (Lumber	1,422	1,390	(0.02)
Plywood	212	237	0.12
Manicole Palm Other	435	583	0.34
Other*	2,238	2,811	0.26
Total	**19,616**	**20,000**	**0.02**

Other: includes activities in the Furniture, Building Components, Craft, Utensils/Ornaments, Firewood, Charcoal and Conservation

For the review period January to December 2020, despite the pandemic, employment within the forestry sector increased by 0.02%. Forest sector employment in 2020 was recorded at 20,000, up from 19,616, which was recorded in 2019. Of the six active areas of the forest sector, decline in employment was recorded in the Sawmilling and the Timber Dealership (Lumberyard) category.

8.1 Domestic Prices

Table 3: Average Domestic Prices

PRODUCT	*Year*									
	2016		*2017*		*2018*		*2019*		*2020*	
	G$	US$	G$	US$	G$	US$	G$	US$	G$	US$
Logs	37,080	180	36,400	175	35,910	171	35,280	168	37,590	179
Sawnwood *	140,080	680	143,520	690	135,030	643	149,520	712	207,900	990
Dressed	154,500	750	161,200	775	156,660	746	164,640	784	220,080	1048
Undressed	117,420	570	117,520	565	110,040	524	114,870	547	169,050	805
Roundwood	92,700	450	91,520	440	96,600	460	101,220	482	111,930	533
Splitwood	49,440	240	54,080	260	57,750	275	60,060	286	78,120	372
Fuelwood	7,210	35	8,320	40	8,820	42	7,560	36	10,080	48
* Row indicates combined average for Dressed and Undressed Sawnwood (not very clear. Please clarify)										
** Average 2020 Exchange Rate: G210 =$1										

Domestic prices increased in 2020 for all forest products. This increase has been attributed to the Covid-19 pandemic, where many producers were forced to downstream their operations. Logs and Sawnwood both dressed and undressed recorded the largest percentage increase.

9. Export

9.1 Export Summary

In this section, the types of forest products exported are presented along with a detailed analysis of their contributions to the forest sector. Table 4 compares the export performances of the various forest products for 2020 in comparison to their 2019 levels, by product and category, where applicable.

Total Timber and Plywood exported over the review period declined in both volume and value by 16.59% and 14.91%, respectively; Other Value Added Products decreased in value by 67.6% in value; Other Products declined in value by 3.02%, in comparison to 2019 figures. Overall the total value of exports for 2020 declined by 15.54% when compared to 2019 figures.

Log exports declined in both volume and value by 18.01% and 14.42% respectively when compared to log data that was recorded in 2019.

Sawnwood exports also declined in volume by 16.21%, from 18,128m3 in 2019 to 15,189m3 in 2020, representing an 18.15% decline in revenue earned. The decline in volume was largely attributed to a decrease within both the Dressed and the Undressed category.

Over the review period, Roundwood export decreased by 10.85%, with an export quantity of just 4,841m3 against 2019 exported volume of 5,431m3. A detailed analysis indicates that a decline in the export of Greenheart Piles of 3.74% was the main contributor to this recorded outcome.

Splitwood consists of Paling Staves and Shingles. Shingles was the dominant product within this category that was exported over the review period, and recorded a 22.93% increase in export volume coupled with a 24.98% in value earned for the period January to December 2020. A miniscule amount of 1.05m3 of Paling Staves was exported with paltry earnings of US$1,359. Contradicts with 7.4 which states that no shingles were produced in 2020. Clarify

Splitwood Shingles was the lone product that recorded increase of all exported Timber and Plywood products.

Plywood export reflected a decrease of 36.66% and 35.77% in volume and value respectively, during 2020 when compared with the corresponding 2019 totals. Fuelwood export decreased by 12.03% in value with respect to the comparative period. Other Non-Timber Forest Products recorded also decreases in value of 199.62%.

Table 4: Forest Products Export 2020

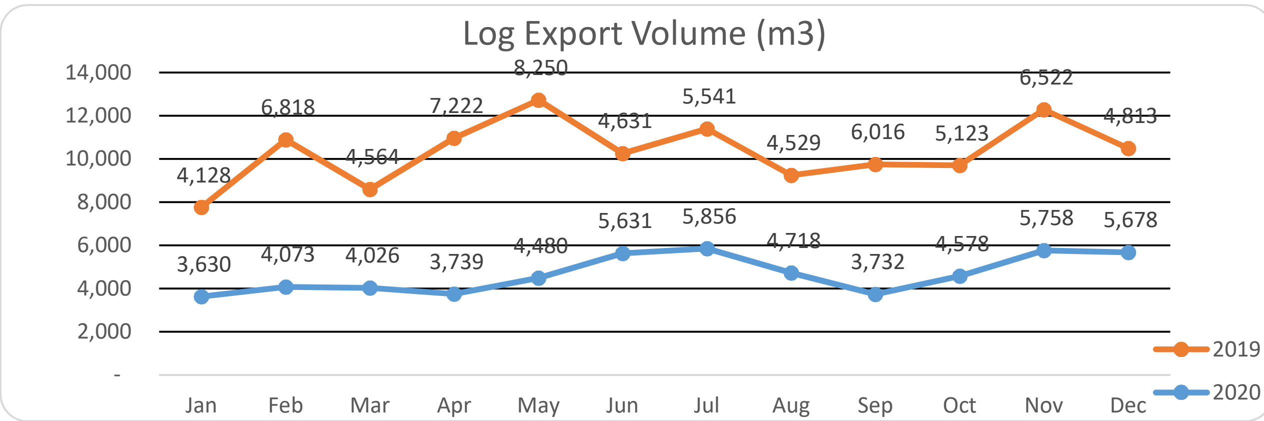
GUYANA FORESTRY COMMISSION						
Table 2: **Export Volumes and Values** *by* **Product for the period December 2020**						
	Jan-Dec 2020		**Jan-Dec 2019**		**% Change** *Over*	
PRODUCT	**Volume**	**Value**	**Volume**	**Value**	**Jan-Dec 19**	
	m^3	US$	m^3	US$	% Vol	% Val
Logs	**55,899.21**	**9,707,503.87**	**68,178.01**	**11,342,743.08**	**(18.01)**	**(14.42)**
Sawnwood	**15,189.28**	**15,035,243.86**	**18,128.10**	**18,368,603.92**	**(16.21)**	**(18.15)**
Dressed	*6,279.05*	*7,573,102.21*	*7,959.34*	*10,005,991.09*	(21.11)	(24.31)
Undressed	*8,910.24*	*7,462,141.65*	*10,168.76*	*8,362,612.83*	(12.38)	(10.77)
Roundwood	**4,841.59**	**2,158,125.10**	**5,431.11**	**2,779,832.50**	**(10.85)**	**(22.36)**
Greenheart Piles	*4,649.49*	*2,004,048.38*	*4,830.16*	*2,327,999.60*	(3.74)	(13.92)
Kakaralli Piles	-	-	-	-		
Other Piles	*1.05*	*1,359.82*	-	-		
Poles	*87.88*	*64,070.00*	*478.29*	*377,100.41*	**(81.63)**	**(83.01)**
Posts	*103.17*	*88,646.90*	*122.66*	*74,732.49*	**(15.89)**	**18.62**
Spars	-	-	-	-	-	-
Splitwood	**3,209.40**	**3,102,330.99**	**2,610.85**	**2,482,280.10**	**22.93**	**24.98**
Paling Staves	1.18	480.00	3.89	1,584.00	(69.70)	(69.70)
Shingles	3,208.22	3,101,850.99	2,606.96	2,480,696.10	23.06	25.04
Plywood	**1,402.95**	**752,807.33**	**2,214.96**	**1,172,112.95**	**(36.66)**	**(35.77)**
Veneer	-	-	-	-		
TOTAL TIMBER & PLYWOOD	**80,542.42**	**30,756,011.15**	**96,563.03**	**36,145,572.55**	**(16.59)**	**(14.91)**
Furniture (pcs)	-	**1,220.00**	-	**195,614.64**		
Indoor Furniture	21.00	1,220.00	2,261.00	160,566.64	(99.07)	(99.24)
Outdoor/Garden Furniture	-	-	80.00	35,048.00	-	-
Building Componentry (pcs)	-	**145,302.09**	-	**262,282.37**		**(44.60)**
Doors	484.00	97,861.34	886.00	190,293.40	(45.37)	(48.57)
Door Components	111.00	687.00	10.00	2,353.00	1,010.00	(70.80)
Windows	528.00	31,417.81	622.00	42,230.00	(15.11)	(25.60)
Other Builder's Joinery (pcs)	162.00	10,438.75	461.00	11,683.83	(64.86)	(10.66)
(m^3)	-	-	-	-		
Rails (pcs)	32.00	2,232.11	88.00	11,403.70	(63.64)	(80.43)
Wattles	19.00	19.00	16,029.00	2,602.35		
Spindles (pcs)	561.00	2,646.08	154.00	1,716.09	**264.29**	**54.19**
Mouldings (m)	**7,064.04**	**20,435.73**	**27,830.98**	**57,449.02**	**(74.62)**	**(64.43)**
Pre-Fabricated Houses (pcs)	-	-	-	-	-	-
OTHER** (than Plywood) **VALUE ADDED	-	**166,957.82**	-	**515,346.03**		**(67.60)**
Fuelwood (m^3)	**7,974.58**	**261,908.92**	**5,366.10**	**297,719.81**	**48.61**	**(12.03)**
Charcoal	8,221.21	261,188.00	8,897.39	295,349.39	(7.60)	(11.57)
Firewood	25.37	720.92	56.97	2,370.42	(55.47)	(69.59)
Other (pcs)	**9,289.00**	**1,363.66**	-	**3,969.40**		**(65.65)**
Wooden Ornaments & Utensils	531.00	1,050.00	513.00	2,092.50	3.51	(49.82)
Craft	9,474.00	313.66	1,355.00	1,876.90	599.19	(83.29)
Non - Timber Forest Products (pcs)	**1,097.00**	**43,340.04**	**5,518.00**	**14,465.18**	(80.12)	199.62
OTHER PRODUCTS	-	**306,612.62**		**316,154.39**	-	**(3.02)**
TOTAL EXPORT VALUE		**31,229,581.59**		**36,977,072.97**		**(15.54)**

9.1.1 Log Export

This section provides a detailed breakdown for the various aspects of forest product exports during 2020.

Log export volume for the period January to December 2020 totalled 55,899m3 with a corresponding value of US$9.70M. Compared to the previous year's total of US$11.34M, this represents a decrease of 18.01% in volume and 14.42% in value. The line graph below illustrates the total monthly log exports for 2020, compared to 2019 monthly volume.

Figure 9: Monthly Trend of Log Export



9.1.2 Sawnwood Export

Sawnwood exports for 2020 totalled 15,189m3 and earned US$15.03M in revenue, while figures for 2019 was 18,128m3 and US$18.36M for volume and value respectively.

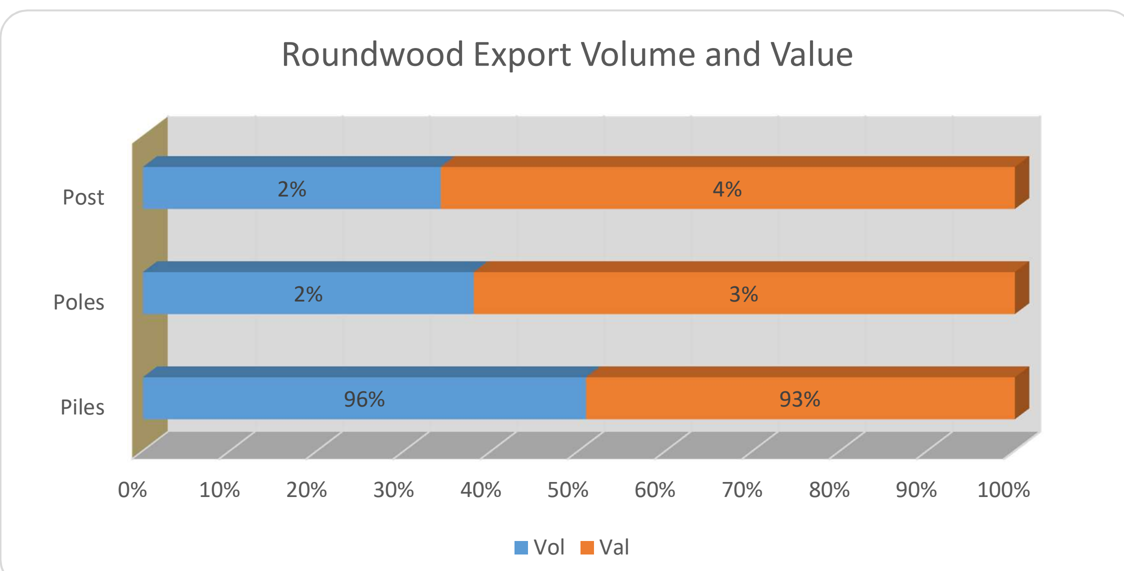
The graph on the overleaf shows the percentage share of the various categories of Sawnwood exports and their contribution to the product total. Within this category, dressed Sawnwood was highest value earner with earnings of US$ 7.57M. The Undressed category recorded the highest exported volume.

Figure 10: Export Volume and Value of Dressed and Undressed Sawnwood

9.1.3 Roundwood Exports

Comparison of Roundwood exports for the years 2020 and 2019 reveals a decline of 10.85% in volume and to a similar extent a decline of 22.36% in value. Volume of exports fell from 5,432m3 in 2019 to 4,841m3 in 2020. Revenue earned from Roundwood export for 2019 was US$2.77M whereas revenue earned in 2020 was US$2.15M. Within the Roundwood category, there are three (3) sub products which are exported over the review period; Piles, Poles, and Posts.

Figure 11: Roundwood Products Export

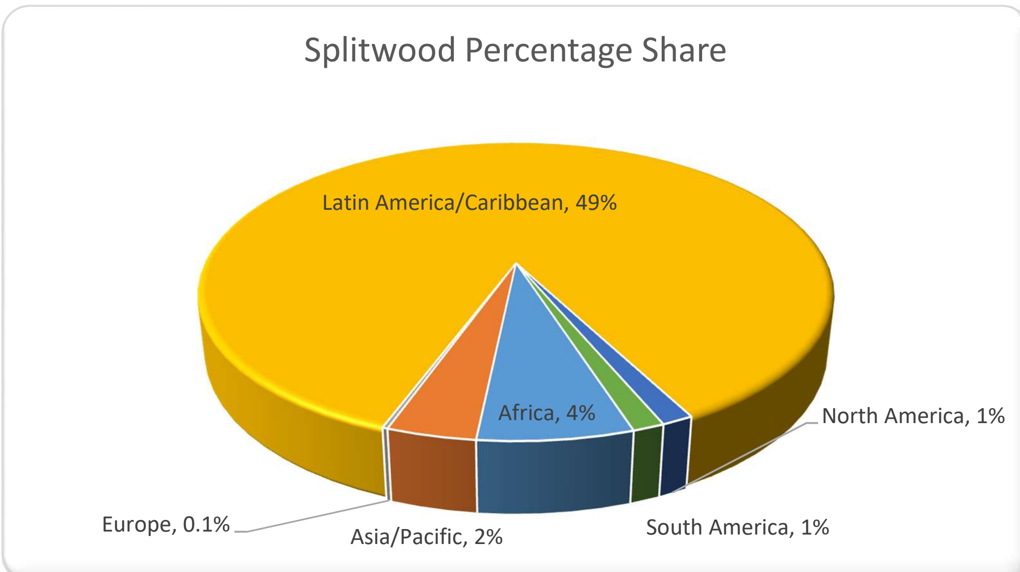


9.1.4 Splitwood Exports

Shingles and Staves are two products exported under the Splitwood category during 2020. Of these two products, Shingles (99%) accounts for the larger market share.

The main regions for Guyana's Splitwood have been Latin America and the Caribbean, North America, Africa, Asia and Pacific regions.

Figure 12: Percentage Share of Splitwood Export

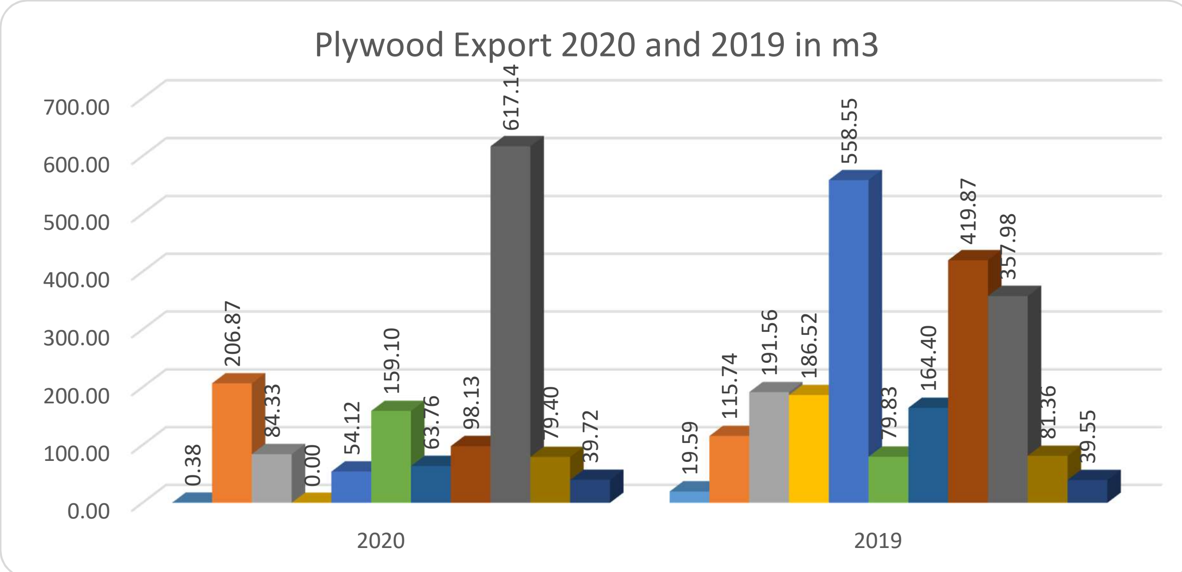


Splitwood exports increased in volume by 22.93% and in value by 24.98% in 2020 as compared to 2019. Both Shingles and Paling Staves was exported in 2020.

9.1.5 Plywood Export

Plywood exports for 2020 recorded lower volumes, because of lower production. Plywood exports for 2020 totalled 1,402m3 in volume at a value of US$0.75M, a decline of 36.66% and 35.77% respectively over 2019 volume and value which totalled 2,214m3 and US$1,17M, respectively.

Figure 13: Comparative Plywood Export



9.1.6 Other Value Added Exports

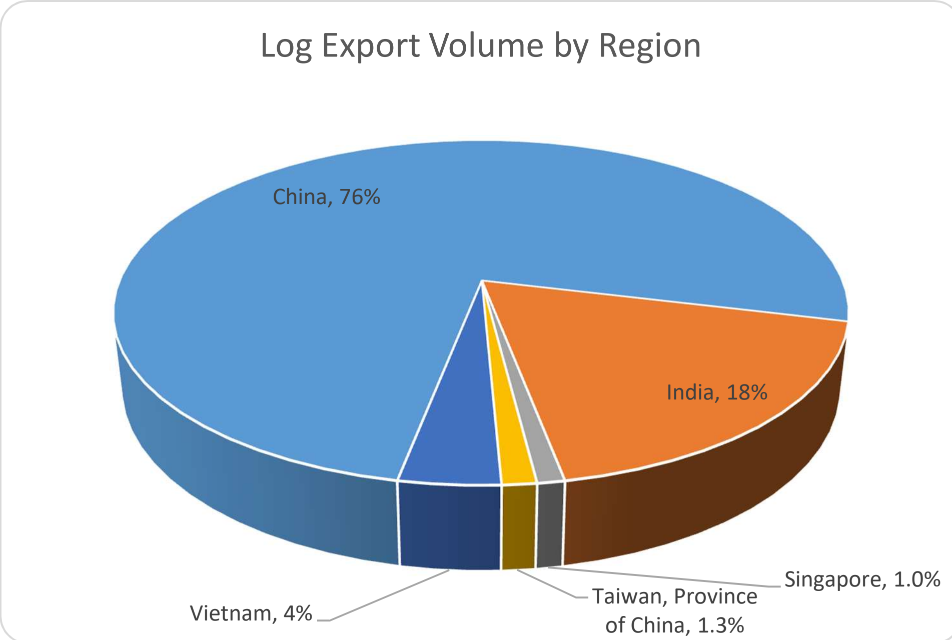
Export from Other Value-Added Products (other than Plywood) for 2020 declined in value by 67.60%. Conversely, Non Timber Forest Products recorded increase in 2020 by 199.62%. Despite the overall decline in Other Value-Added Products, Building Components and Furniture, has been exported in 2020. For 2021, the Guyana Forestry Commission envisaged there would be an increase in the demand for Guyana's Non-Timber forest products. Other products within this category includes Mouldings and Pre-Fabricated Houses.

9.2 Export by Destination

This section examines exports of Timber products, which includes; Logs, Sawnwood, Roundwood, Splitwood, and Plywood, by their export destinations with respect to the international regions of Asia/Pacific, Europe, Latin America/Caribbean, North America, South America and Africa.

9.2.1 Log Export by Destination

Figure 14: Export Percentage Share by Regions



The Chart above illustrates the percentage distribution of Guyana's Log exports volume by region. As shown 100% of all Logs exported went to the Asia/Pacific region, with an export revenue of US$9.7M.

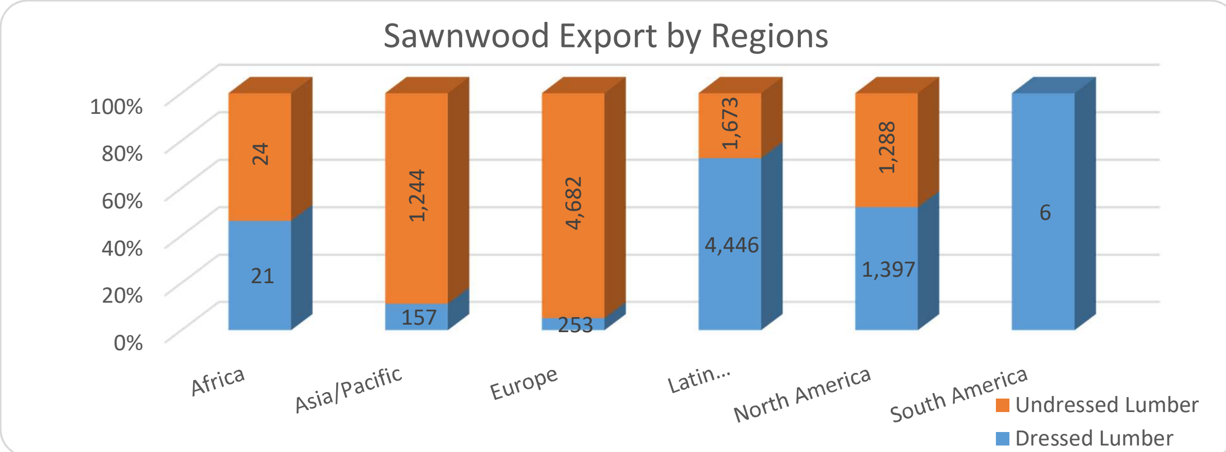
Within the Asia Pacific region, China accounts for 76% of the total Log exports market share, followed by India with 18%.

Total Logs exported to the Asia/Pacific region amounted to 55,899m3. The Asia/Pacific region remains the principal market of Guyana's Log export.

9.2.2 Sawnwood Lumber Export by Destinations

The Latin America/Caribbean (LAC) region continues to be the main destination for Guyana's Sawnwood exports with volumes of 6,118 m3 exported to 14 destinations markets. Total export revenue from the LAC region was US$5.62M. Other significant markets for Guyana's Sawnwood was in Europe, North America, and the Asia Pacific region. Total value from these markets was US$9.33M.

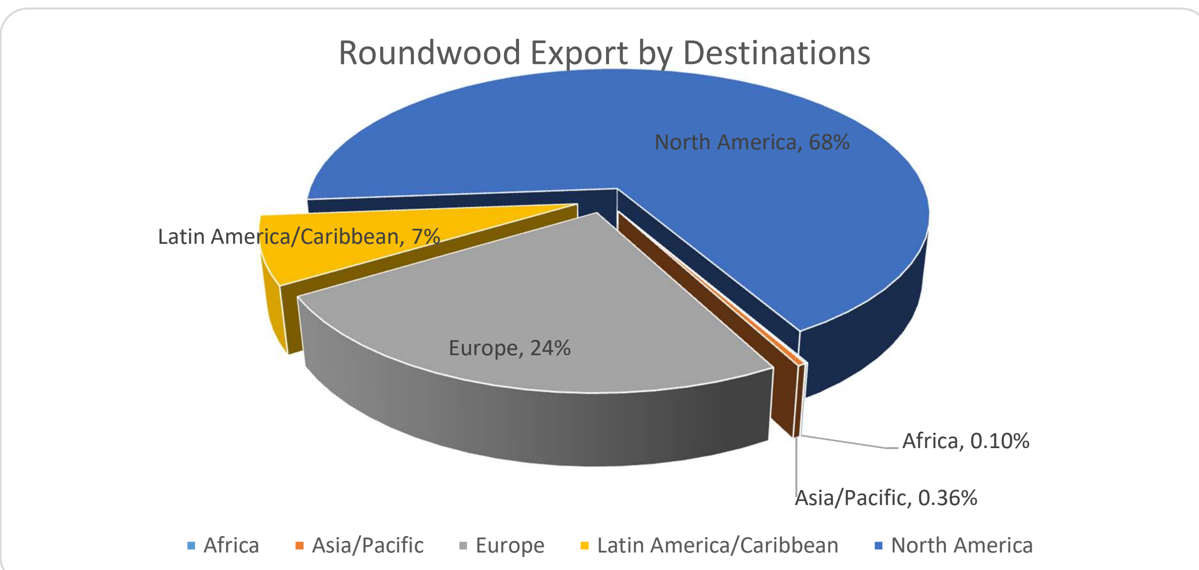
Figure 15: Sawnwood Regional Export



9.2.3 Roundwood Export by Destinations

In 2020, North America (3,286m3) region has been the largest destination market for Guyana's Roundwood. This was followed closely with export to Europe (1,176m3), and the Latin America and the Caribbean region (356m3). Other smaller destination markets were in Asia Pacific, and Africa. The main export products within this category has been significantly Greenheart piles (4,650m3). Other products exported under this category has been Post (103m3) and Poles (88.93).

Figure 16: Percentage Share of Roundwood Export



9.2.4 Splitwood Export by Destinations

Shingles totalling 3,208m3 and valued at US$3.1M, was exported during 2020. A small volume of 1.18m3 of Fence Staves was also exported. The majority was exported to the Latin America/Caribbean region (51% of all Shingles exported). The leading markets within this region were the French West Indies, Bahamas, and St Kitts and Nevis, which accounted for 52% of the region's total respectively.

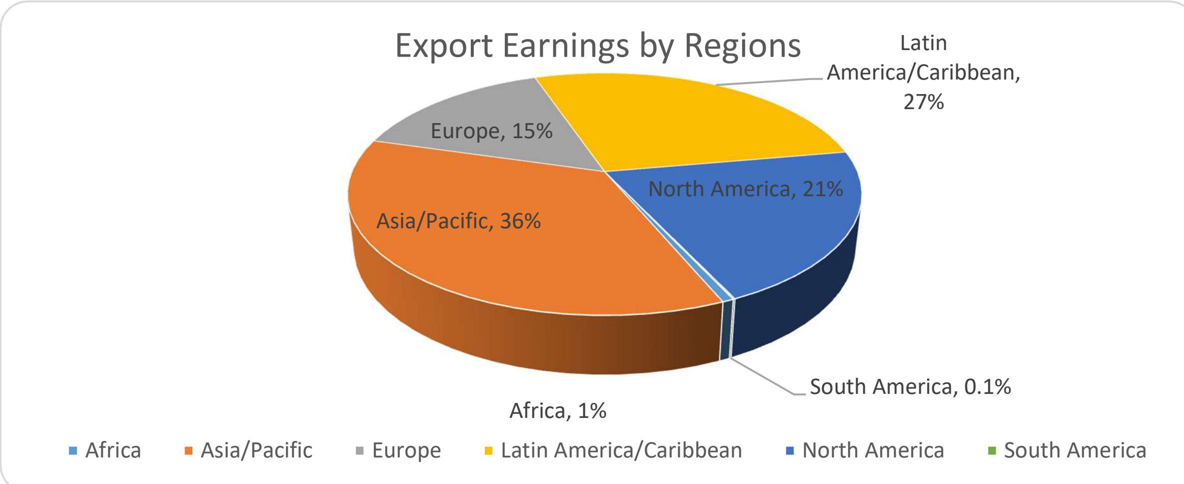
Figure 17: Percentage Share of Splitwood Export

For 2020, the Latin America/Caribbean region has been the only destination for Guyana's Plywood. Overall, Plywood exports totalled 1,402m3 in volume at a value of US$0.75M.

9.3 Forest Sector Export Earnings by Destinations

The Asia/Pacific region has been the largest market for Guyana's forest products with value earned in 2020 amounting to US$11.2M and accounting for 36% of total export earnings. Export of US$8.58M to the Latin America and the Caribbean region, accounted for 27% of total export value, and has been the second largest export destination for Guyana's timer and Plywood products.

Figure 18: Forest Products Export Earnings by Regions



Guyana has seen a steady increase in its export to North America and Europe over the past few years. Despite the Covid-19 pandemic, Export to these two regions has increased. These two regions accounts for 36% of total export from Guyana.

Table 5: Value Percentage Share by Regions

Market Destinations	2016	2017	2018	2019	2020
Africa	0.1%	1%	1%	1%	1%
Asia/Pacific	49.6%	47%	40%	38%	36%
Europe	5%	7%	8%	10%	15%
Latin America/Caribbean	27.0%	29%	33%	29%	27%
North America	18%	16%	18%	22%	21%
South America	0.1%	0.2%	0.1%	0.1%	0.1%
Total	**100%**	**100%**	**100%**	**100%**	**100%**

9.4 Export Prices

Export prices increased in all categories of exported forest products during 2020. The product category with the largest price increase was Fuelwood which saw a 32% increase in export prices over the 2019 level.

Logs which comprises up the majority of the export volume, saw a 6.8% increase in average price level in 2020.

Undressed Lumber remained relative stable with an average export price of USD804. Dressed

Lumber prices increased by 6% while Roundwood, Splitwood and Plywood recorded overall increase in its average price levels in 2020 when compared with 2019.

Table 6: Forest Products Export Price

Products	**2019/m3**	**2020/m3**	**% change over 2019**
Logs	170	180	6%
Sawnwood **	1,071	1,168	9%
Dressed	1,172	1,248	6%
Undressed	796	804	1%
Roundwood	589	633	7%
Splitwood***	662	810	22%
Fuelwood	41	54	32%
Plywood	530	551	4%

** Rows indicates a combined average of Dressed and Undressed Sawnwood

*** Splitwood Export prices refers to Mill produced Splitwood mainly Shingles

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