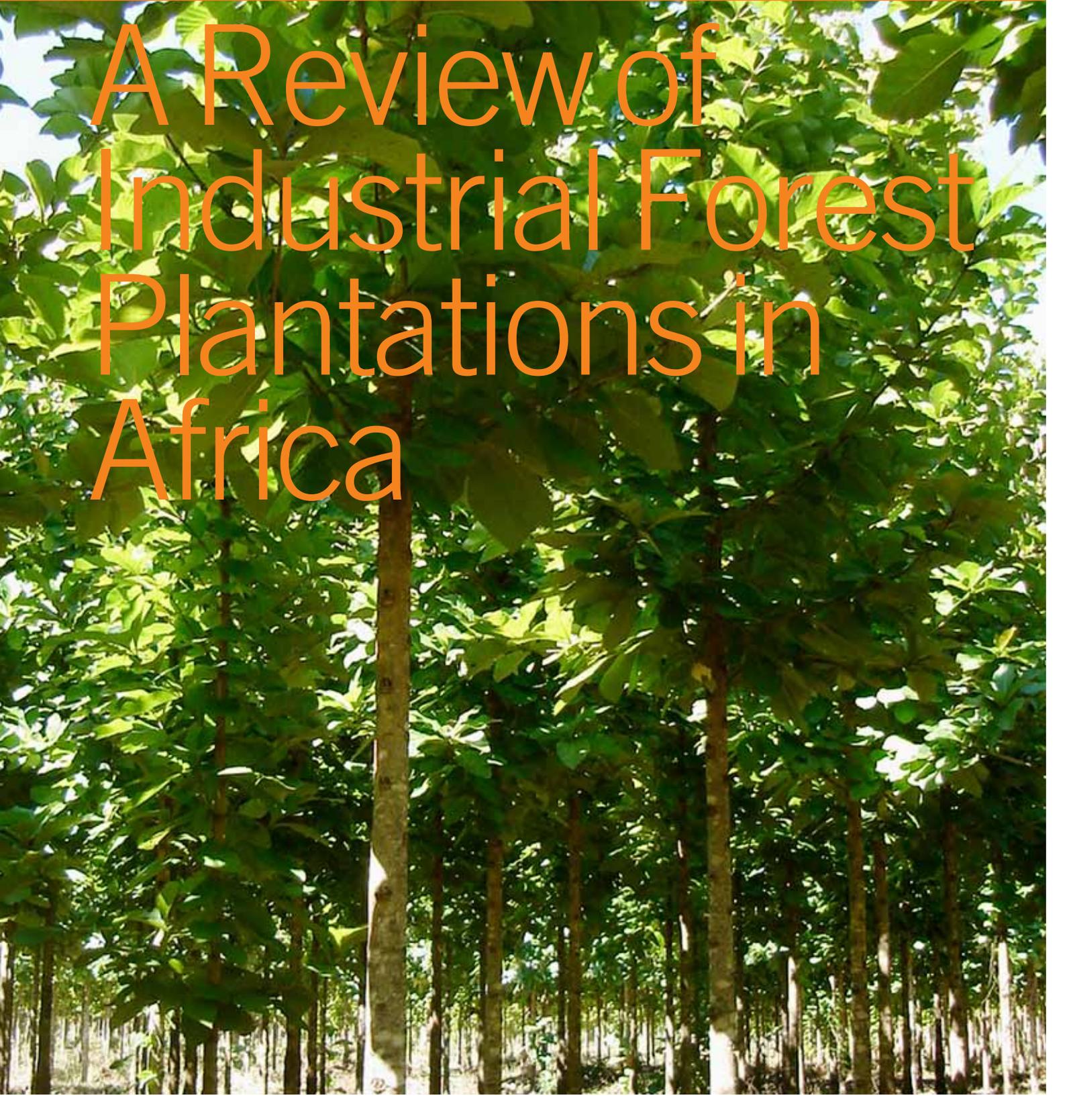


**PÖYRY VIEWPOINT:  
AFRICAN PLANTATION FORESTRY**



# A Review of Industrial Forest Plantations in Africa

# Background



View of eucalyptus plantations in Angola.

According to the FAO (2005) there are 10.8 million hectares of industrial forest plantation in Africa, yet with the exception of a small number of countries (e.g. South Africa) there is very little reliable information on this resource.

## KEY STUDY QUESTIONS

Pöyry has developed a study aimed at assisting potential investors policy makers or wood consumers by answering the following key questions:

- What is the real extent of industrial forest plantations currently in Africa?
- What is the condition and level of management of these plantations?
- Who are the main players in each country?
- What countries have good potential for expanding plantation development, and why?
- What potential is there for these plantations to serve local/export markets?
- What countries are currently “hot spots” for plantation development?

There is growing interest in Africa as a destination for forest investors, drawn by the availability of land, competitive rates of tree growth, and low labour costs. In many African countries there is good potential to develop local markets for wood products. The continent is potentially an important future source of biomass for the European bioenergy sector, as well as being ideally placed to supply the Asian log and pulpwood markets.

■ = Countries to be individually profiled

- Algeria
- Angola
- Cameroon
- Côte d'Ivoire
- Dem. Rep of Congo
- Ethiopia
- Gabon
- Ghana
- Kenya
- Liberia
- Madagascar
- Malawi
- Morocco
- Mozambique
- Nigeria
- Rep of the Congo
- South Africa
- Sudan
- Swaziland
- Tanzania
- Tunisia
- Uganda
- Zambia
- Zimbabwe



## CONTENTS

**Introduction** – Overview of the rationale behind the study, discussion around existing data sources such as FAO, present view on why Africa is of increasing interest and importance for the global forest industry.

**Country Profiles** – Each of the 24 countries will have a dedicated chapter in which the following topics will be covered:

- **Country profile** – A short introduction to the country at a macro-level, including key statistics.
- **Economy** – Broad overview of the economy describing its main drivers and highlighting factors such as historical GDP growth.
- **Investment climate** – Discuss current investment activity (across all sectors, but particularly in infrastructural projects like railways, roads, or ports which would benefit forestry projects) and present FDI statistics. Highlight government support for forestry investments, either by way of targets for plantation establishment, or incentives/subsidies that might be available to plantation developers.
- **Current status of plantation development** – Provide Pöry data on current plantation area by species and owner.
- **Availability of land for new plantations** – Discuss climate, current land use patterns, population pressure, and potential

extent and location of land for new developments. Where relevant give a brief description of process for acquiring title to land.

- **Overview of wood-based industry** – Provide an overview of the wood-based industry in the country in terms of overall size, segmentation (e.g. sawmilling, pulp & paper, energy, treated poles etc), and geographic location. Also discuss likely trends in industry development (e.g. expansions or new investments) in the country.
- **Plantation owner profiles** – List the major companies/organisations that own or operate industrial plantations in the country. Describe the size and location of their existing plantations, together with any expansion plans that they may have. Discuss the current or intended usage of the industrial roundwood produced, and if applicable describe the location and capacity of any processing facilities that the company/organisation has.
- **Investor's SWOT analysis** – Summarize the key issues that should be considered when looking at a plantation investment.

**Summary and conclusions** – Identify key trends and opportunities for various stakeholders.

## APPROACH

Pöry will utilise its extensive internal data resources as the foundation for the study. This data has been gathered over years of project-related activity in Africa, and provides Pöry with a unique insight into plantation development on the continent. This base will be complemented by further desktop research, including interviews with plantation owners and relevant stakeholders

## GEOGRAPHIC SCOPE

In addition to analysis at the continental-level, the study will provide individual profiles for 24 countries. These countries have been selected on the basis of a significant plantation resource being present and/or the potential for new large-scale plantation development to occur within the coming few years.





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