

BOLIVIAN EXPORTS OF WOODEN FLOORING

WHAT DO WE KNOW ABOUT THE RISKS OF ILLEGAL LOGGING AND TRADE?

By **Marigold Norman** and **Alfredo Rodriguez Zunino**

South America's wood products industry is known for its production of flooring, molding, and strip products (referred to as "flooring" throughout this publication)¹ made from high value species such as cumaru (*Dipteryx* spp.), ipê (*Handroanthus* spp.; *Tabebuia* spp.), and many other lesser-known species. In 2019, South American companies exported more than US\$946 million of flooring products – accounting for 20 percent of the global trade.

At least 70 percent of South America's wood flooring products are exported from seven Amazon Basin countries.² Brazil and Peru are the top two Amazon exporters of flooring, accounting for over US\$600 million in trade in 2019. Both countries have been subject to significant media and NGO scrutiny focused on the soaring deforestation rates in the Amazon, as well as rising concerns about illegal logging, facilitated by corruption and fraud in their respective forest sectors.³

Bolivia, however, the third most significant Amazon exporter of flooring, has received significantly less attention or scrutiny on its forest sector and international trade risks. As much as 80 percent of the wood harvested in Bolivia in the early 2000s was estimated to be illegal (Kleinschmidt et al. 2016). This briefing summarizes what we know about potential illegalities associated with Bolivia's exported flooring products, and implications for trade with global markets.

¹ Flooring, Molding and Strips refers to products exported under Harmonized System (HS) code 4409.

² Based on country reported exports to UN Comtrade for 2019 (value in USD) for 7 of the 9 countries sharing the Amazon basin. Venezuela and French Guiana did not report and French Guiana is a European territory.

³ For a summary of the literature on the risks associated with illegal logging and trade in Brazil and Peru, see forthcoming risk summaries to be published on the ILAT Risk website at FPTF State ILAT - Key Resources - Forest Trends (forest-trends.org).



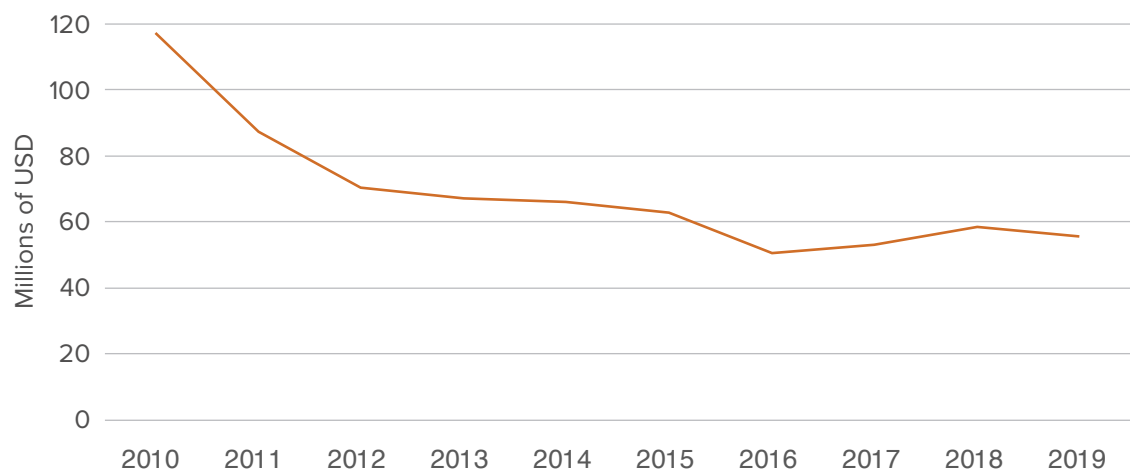
FINDINGS

1

Bolivia's forest products industry's contribution to the national economy and export earnings is relatively small, but has increased recently with expansion into new markets.

Bolivia's timber industry contribution to the country's GDP and export earnings is relatively small, particularly compared with other countries in the region. Timber product⁴ exports started to decline in 2010, dropping 57 percent by value by 2016 following reported declines in the number of productive forest units and certified forest area (Jemio 2018).⁵ Since 2016, exports have been increasing again, with the most significant increases in timber product exports (by value) to France, Chile, the Netherlands, Cuba, Uruguay, China, and Peru. New markets are also emerging, including Bosnia and Herzegovina, Costa Rica, Cuba, Mauritius, New Zealand, and the Philippines.

FIGURE 1 Bolivia's exports of timber products 2010-2019



Source: UN Comtrade 2021, compiled by Forest Trends 2021

2

Wooden flooring is Bolivia's most valuable timber product export, having maintained or slightly increased export levels as the rest of the country's wood product exports declined (by value).

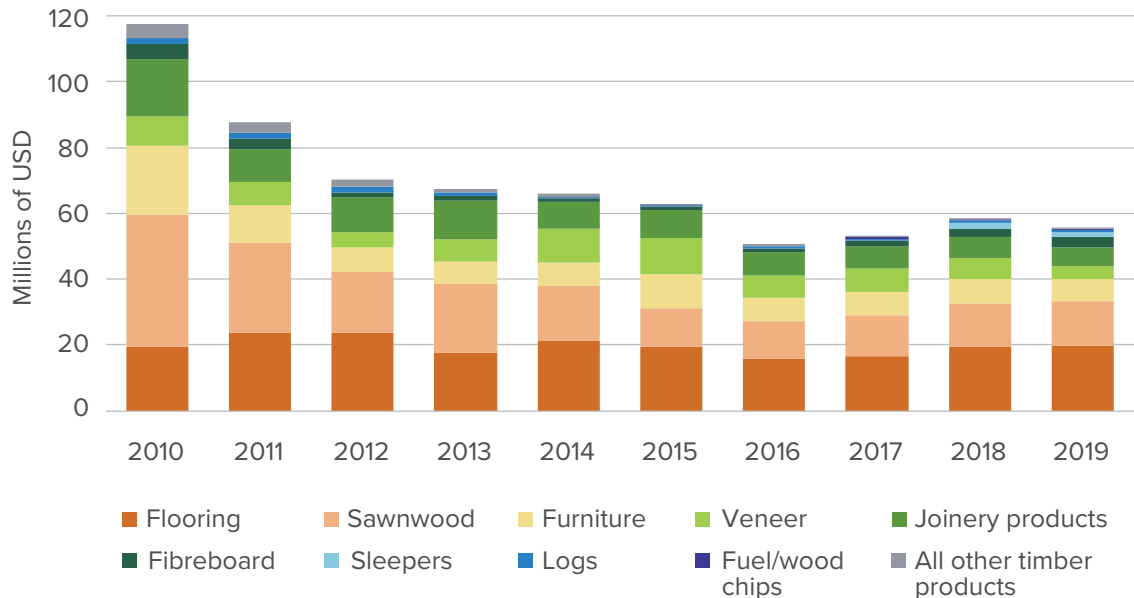
Exports of flooring listed under HS code 4409 have fluctuated over the last decade but saw a 25 percent increase based on value between 2016 and 2019. By 2019, Bolivia's flooring exports were valued at almost US\$20 million. This took place against a backdrop of declining sawnwood exports, which were regularly the most valuable timber product export category until 2014, when exports declined to an annual value of between US\$11 and US\$13.5 million.

⁴ The term 'timber products' is used to refer to wood products as classified in the Combined Nomenclature under Chapter 44 and furniture products under Chapter 94.

⁵ For example, Forest Stewardship Council (FSC) certified forest area was 1,869,775 ha in 2007 but decreased to 482,409 ha by 2019. In recent years FSC reports that certified area is increasing in Bolivia with 863,815 ha certified as of 2021.



FIGURE 2 Bolivia's top exports by timber product 2010-2019



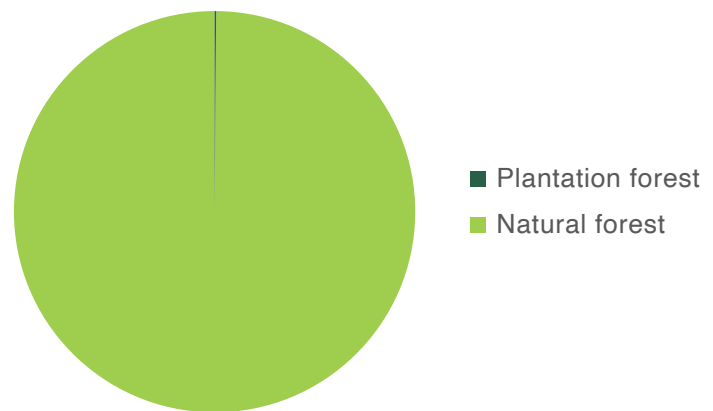
Source: UN Comtrade 2021, compiled by Forest Trends 2021

3

The majority of Bolivia's wood used in flooring and other timber products is sourced from natural forests, where high rates of illegal logging and corruption have been reported.

Bolivia's forest area is estimated at 50.8 million hectares (40 percent of its territory), mainly located in the east and north of the country. An estimated 99.9 percent of Bolivia's forest was categorized as natural forest in 2020. Bolivia reported just 62,600 hectares of plantation forest with extremely limited information on species composition (FAO 2020). Most of the wood used in Bolivia's timber and flooring exports are sourced from natural forests.

FIGURE 3 Bolivia's forest area in 2020
(% based on area in hectares)



Source: FAO 2020, compiled by Forest Trends 2021



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As much as 80 percent of the wood harvested in Bolivia in the early 2000s was estimated to be illegal (Kleinschmidt et al. 2016). More recent estimates of the extent and nature of illegal logging and trade are limited, but a new summary of the risks associated with Bolivia's illegal logging and trade highlights that illegal logging is widespread.⁶ Corruption is reportedly a significant challenge, with reports of false or fraudulent documents issued by government officials for Bolivian harvested timber allowing illegal timber to be laundered into legal supply chains accompanied by government documents (Página Siete 2019). Most illegal timber that has been fraudulently laundered into the supply chain has been harvested from protected areas, indigenous territories, or natural forests (Jemio 2018). Enforcement in Bolivia remains weak (Jemio 2018) and there is a risk that Bolivian-harvested high-value species continue to be exported in contravention of export restrictions.

4

Most of Bolivia's flooring exports are high-value Amazon species considered high risk for illegal logging, such as cumaru and ipê.⁷ Estimates of the volume of cumaru and ipê exports are likely under-estimates, as roughly 35 percent of Bolivia's exports did not include any information on the species.

Bolivian-exported flooring products were comprised of at least 18 reported species in 2019.⁸ Cumaru (*Dipteryx* spp.) and ipê (*Handroanthus* spp.; *Tabebuia* spp.) were the most widely reported species, with 26 percent of flooring exports by volume reporting cumaru in the bill of lading. An additional 12 percent of exports reported ipê flooring. Cumaru and ipê both occur in Bolivia's savannah ecosystem, which has become highly threatened and degraded by agriculture and logging.⁹

It is likely that the overall volume of cumaru and ipê flooring exports is significantly higher. Roughly 35 percent of exports by volume did not declare any species information in the shipment data, and 2 percent were reported to be a "mix" of species.

In-depth spot checks of the "undeclared" exports listed in U.S. import data showed that many were in fact cumaru and ipê. Additional analysis would be required to accurately capture the species export profile for Bolivia.

⁶ For a summary of the literature on the risks associated with illegal logging and trade in Bolivia see ILAT Risk website at FPTF State ILAT - Key Resources - Forest Trends (forest-trends.org)

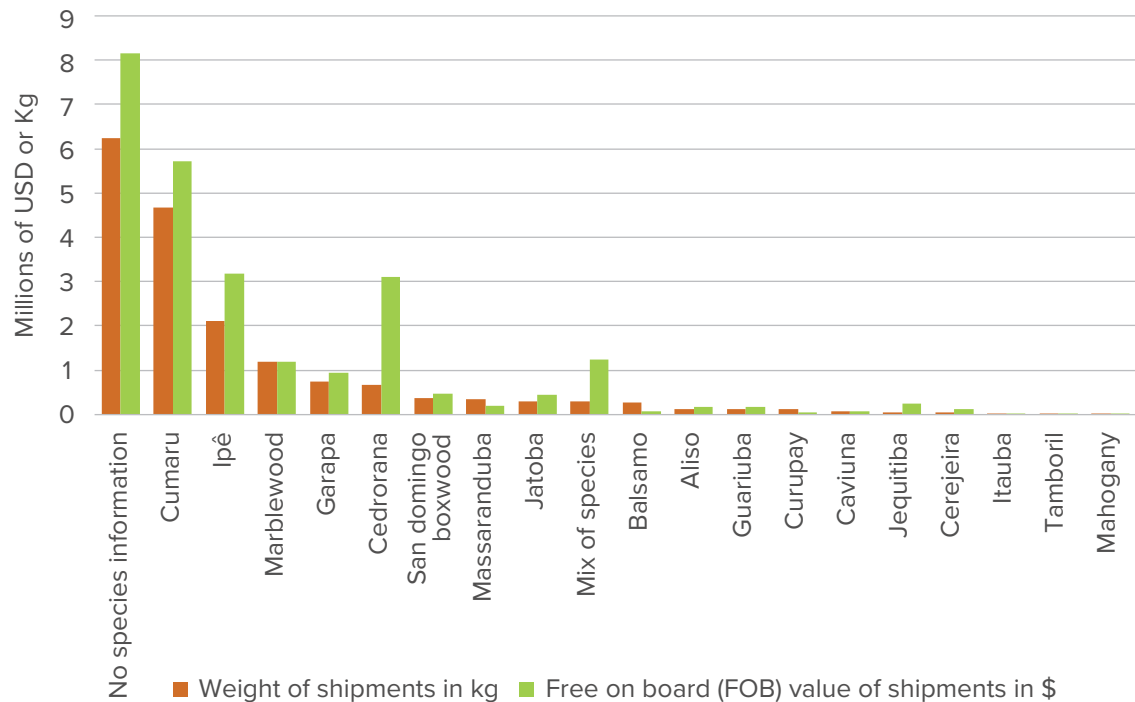
⁷ Forest Trends analyzed detailed shipment records for Bolivia's exports of HS code 4409 to offer insight into the species risk profile of Bolivia's flooring. Shipment records contain more information than public international trade datasets such as UN Comtrade or Eurostat. For example, shipment record data provide information on the exporter, supplier, port, and product through a description field, which may include information on the species. Data were purchased from Export Genius, one of several companies that provide detailed customs data/trade data. Data are available for purchase at <https://www.exportgenius.in/company/about-us.php>.

⁸ The Government of Bolivia, as well as other governments, do not mandate exporters to list species information on shipping manifests, except for products produced with CITES-listed species. Thus, some of the shipment record data do not list information on species, while other shipment records provide detailed information on one or more species, typically in the product description section.

⁹ Bolivia prohibits the harvest or commercialization of protected species and publishes an extensive list of threatened or endangered species in the Red Book of Bolivia ("Libro Rojo de Plantas Amenazadas"). The Red Book was last updated in 2018 for the Andean region, and in 2020 for the lowlands region. Thus, any species listed in these Red Books sourced from Bolivia should be considered high-risk. Species with reports of illegal logging include • Ochoó (*Hura crepitans*) • Ipé or Tajibo (*Handroanthus* spp.; *Tabebuia* spp.) • South American Oak or Roble (*Amburana cearensis*) • Morado or Caviuna (*Machaerium scleroxylon*) • Spanish Cedar (*Cedrela odorata*) • Tarara (*Centrolobium microchaete*) • Cumaru or Almendrillo (*Dipteryx* spp.) • Paquió (*Hymenaea courbaril*) • Hoja de Yuca, Kapok, or Mapajo (*Ceiba pentandra*) • Big-Leaf Mahogany or Mara (*Swietenia macrophylla*) • Tipa (*Tipuana tipu*). For more information, see the summary of the literature on the risks associated with illegal logging and trade in Bolivia available on the ILAT Risk website at FPTF State ILAT - Key Resources - Forest Trends (forest-trends.org)



FIGURE 4 Bolivia’s 2019 exports of flooring by species weight and Free on Board (FOB) value



Source: Export Genius 2021, compiled by Forest Trends 2021

Sixteen other species were also reported in Bolivia’s 2019 flooring exports (for a full list see Annex I). Cerejeira (*Amburana cearensis*) is threatened and classified as endangered on the International Union for Conservation of Nature (IUCN) Red List of Threatened Species (IUCN 2021). A species listing on the IUCN Red list does not necessarily imply prohibition of trade under national law, and endangered species may be legally traded, but a listing on the IUCN Red List indicates rising scarcity, which increases the value of the timber species (and hence raises the risk of illegal logging).

The government of Bolivia has prohibited the export of mara (mahogany or *Swietenia macrophylla*) wood since 2011 (Pérez 2011). *Swietenia macrophylla* is currently listed in Appendix II of the Convention on International Trade in Endangered Species of Wild Fauna and Flora (CITES), so cross-border trade in the wood is strictly regulated. The species is also classified as vulnerable on the IUCN Red List (IUCN 2021). There have been reports of illegal logging and export of mara from Bolivia, as well as links to the illegal drug trade. Reports suggest that the people involved in illegal logging of valuable tree species like mara in San Fermin also grow coca and produce cocaine (Neves 2019).



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There have been reports of illegal logging associated with high commercial value species such as caviuna (*Machaerium scleroxylon*), with the Bolivian government's own Forest and Land Authority (Autoridad de Bosques y Tierra — ABT) publishing a report in 2018 that found the agency had authorized the cutting of at least two protected species at far higher rates than were permitted under the law. Permits for tipa (*Tipuana tipu*) had been issued 32,950 percent above the legally permissible rate while permits for morado (internationally traded as "caviuna") had been authorized at 128.5 percent above the permitted rate (Salinas 2019). ABT admitted that some agents were collaborating with criminals to facilitate the illegal logging and trade.

5

Over 77 percent of Bolivian wood flooring is being exported to countries with import regulations prohibiting the trade in illegal timber – despite a high risk that these wood products could be illegal. Between 41 and 72 percent of Bolivia's flooring exported to these regulated markets is believed to be high-risk cumaru or ipê (based on shipment level data for 2019).^{10,11}

Regulations to tackle the trade in illegal wood have now been operational for several years across the EU (through the European Union Timber Regulation), in the United States (through the U.S. Lacey Act) and in Australia (through the Illegal Logging Prohibition Act). Implementation and enforcement modalities are now well established in these jurisdictions (Forest Trends 2017). More recently, Japan and the Republic of Korea have developed regulations to exclude illegal wood imports, while Indonesia and Vietnam have committed to excluding illegal timber from their imports as a key component of the timber legality assurance systems that underpin Forest Law Enforcement Governance and Trade (FLEGT) Voluntary Partnership Agreements (VPAs) (Forest Trends 2019).

Bolivia's flooring exports are overwhelmingly destined for countries that have already taken action to develop import regulations designed to exclude illegally logged timber from their markets. By 2019, 77 percent by value of flooring was exported to countries with import controls in place designed to exclude illegal timber from their markets. This was up from 60 percent in 2012, with the most significant increases in market share happening since 2016.

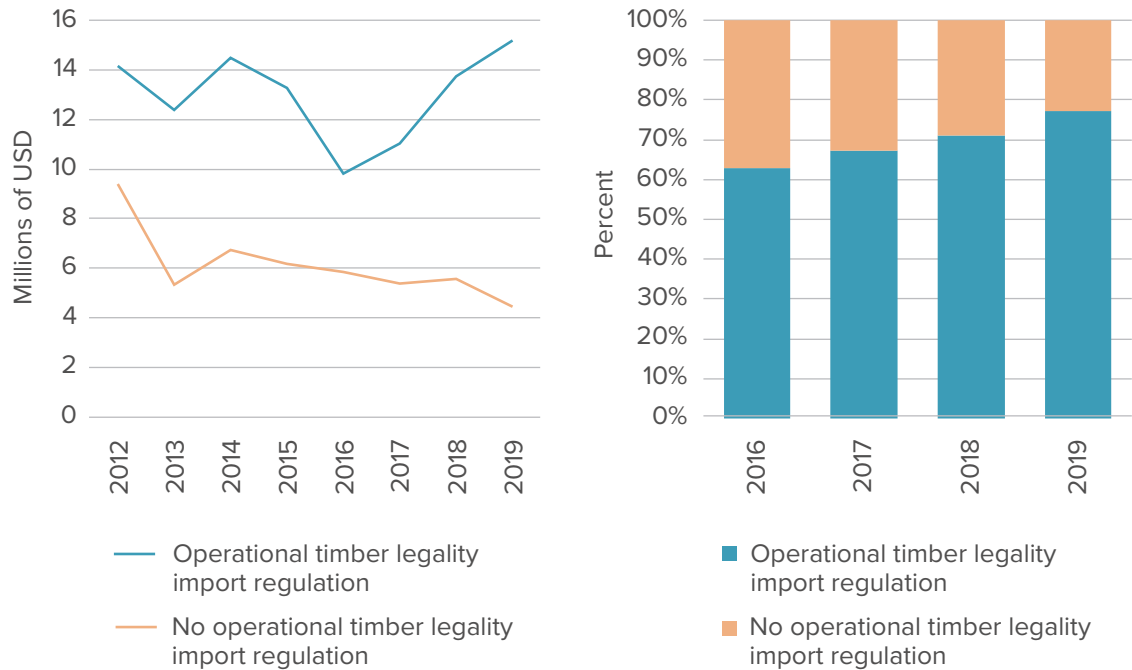
¹⁰ Cumaru and ipê were specifically reported for 41 percent of the exports to regulated markets in 2019 (based on weight). An additional 31 percent of exports were either reported to be a "mix" of species or had no declared species listed in the detailed shipment data. Spot checks looking at how the "undeclared" exports to the U.S. were declared as imports in U.S. customs data showed that many were in fact reported to be cumaru and ipê. Additional analysis is required to accurately capture the species export profile for Bolivia.

¹¹ "Regulated markets" reflect countries and jurisdictions that have developed operational measures to restrict the import of illegal timber. To understand the shift in export destinations, all markets as of 2019 that had operational measures in place were included as a "regulated market" for the entire period in the chart. This included the US, Member States of the European Union (as well as the United Kingdom, Iceland, Liechtenstein, Norway and Switzerland), Australia, Canada, Indonesia, Japan, and Republic of Korea. Some measures are more comprehensive in scope, implementation, and enforcement than others.



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FIGURE 5 Flooring Molding and Strips exports to markets with an operational timber legality import regulation



Source: UN Comtrade 2021, compiled by Forest Trends 2021



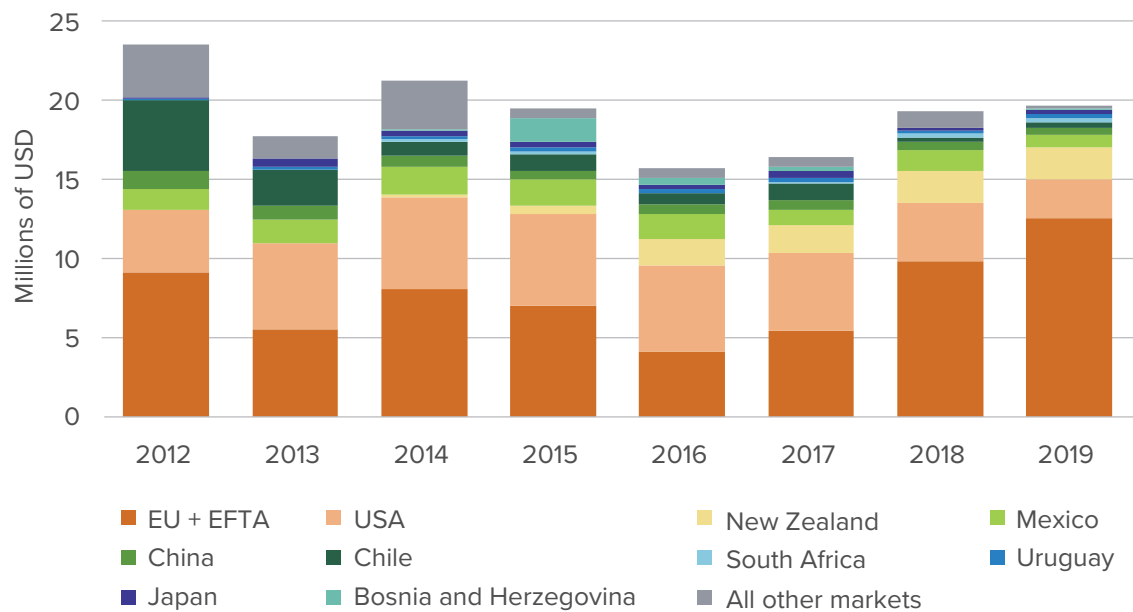


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Europe is now the largest export destination for Bolivia’s wooden floor products.

Exports to the EU + EFTA¹² region rose by over 200 percent since 2016, with marked increases in 2017 and 2018. The EU and EFTA region was the export destination for over half of all Bolivia’s flooring exports in 2019.

FIGURE 6 Bolivian flooring exports 2012-2019



Source: UN Comtrade 2021, compiled by Forest Trends 2021

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Bolivia exported 3,539,994 kg of cumaru, 1,292,814 kg of ipê, and 1,795,162 kg of other species to the EU + EFTA region in 2019.¹³

Almost 90 percent of these exports to the EU + EFTA were reportedly destined for just four EU Member States. France has emerged as the top export destination for Bolivian flooring, a trend evident across the Amazon basin. At least 62 percent of the flooring was reportedly cumaru and ipê, with 30 percent of the exports to France not including any information on species. Other species included san domingo boxwood, massaranduba and tamboril.

Around 20 percent each of Bolivia’s flooring exports to the EU + EFTA region entered through Germany and the Netherlands. Roughly 94 percent of the exports to the Netherlands lacked any information on species. Where species were reported in detailed shipment data,

¹² All references to “EU + EFTA” signify the 27 Member States of the European Union (as of 2021), as well as the United Kingdom, Iceland, Liechtenstein, Norway and Switzerland

¹³ Based on Forest Trends analysis of Bolivia’s customs data of flooring exports in 2019. Export Genius. 2021. Customs Data. Purchased May 2021. <https://www.exportgenius.in/>

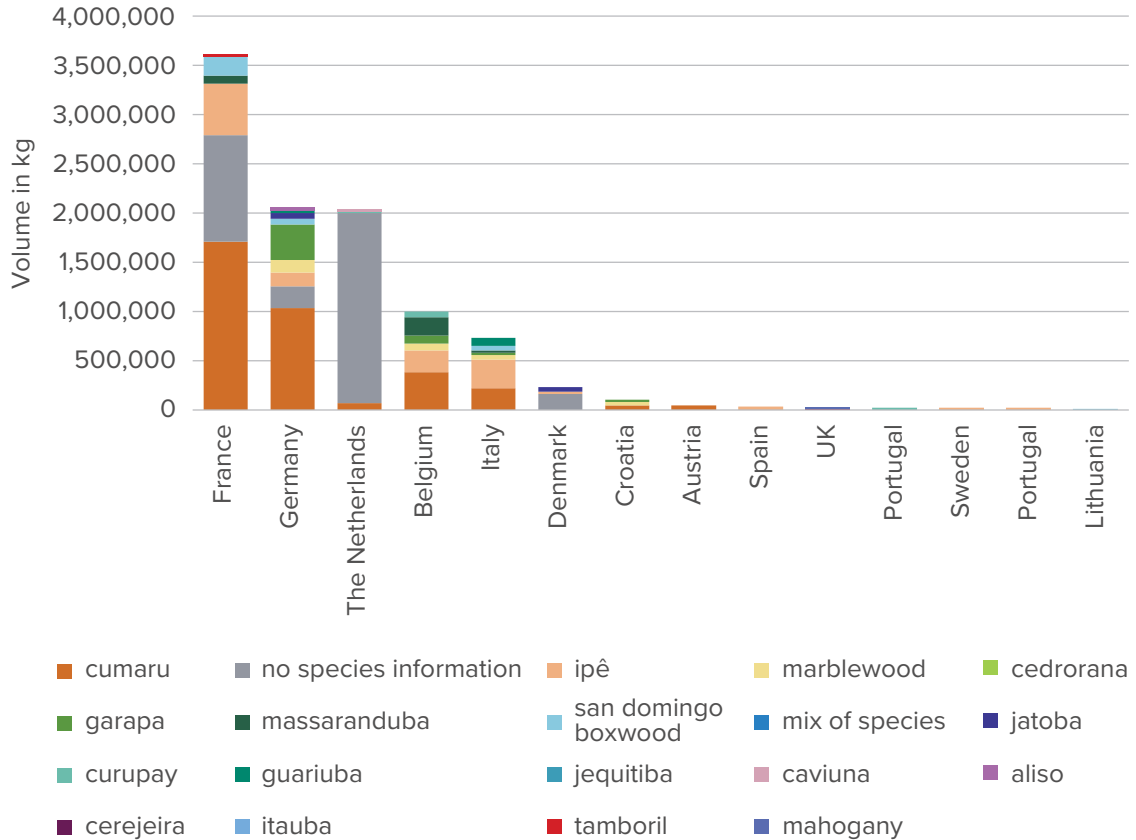


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these included cumaru, curupay, and caviuna. At least 58 percent of the flooring exports to Germany were cumaru and ipê. German importers are also reportedly sourcing flooring of garapa, san domingo boxwood, marblewood, guariuba, jatoba, and also from Bolivia based on 2019 detailed shipment data.

Roughly 10 percent of Bolivia’s flooring exports to the EU + EFTA entered the EU through Belgium in 2019. Cumaru was the most frequently declared species based on value. Cumaru and ipê exports together accounted for 61 percent of all exports to Belgium. Flooring of garapa, massaranduba, marblewood, and curupay was also reportedly exported to Belgium.

FIGURE 7 Exports of flooring to markets with an operational timber legality import regulation



Source: Export Genius 2021, compiled by Forest Trends 2021



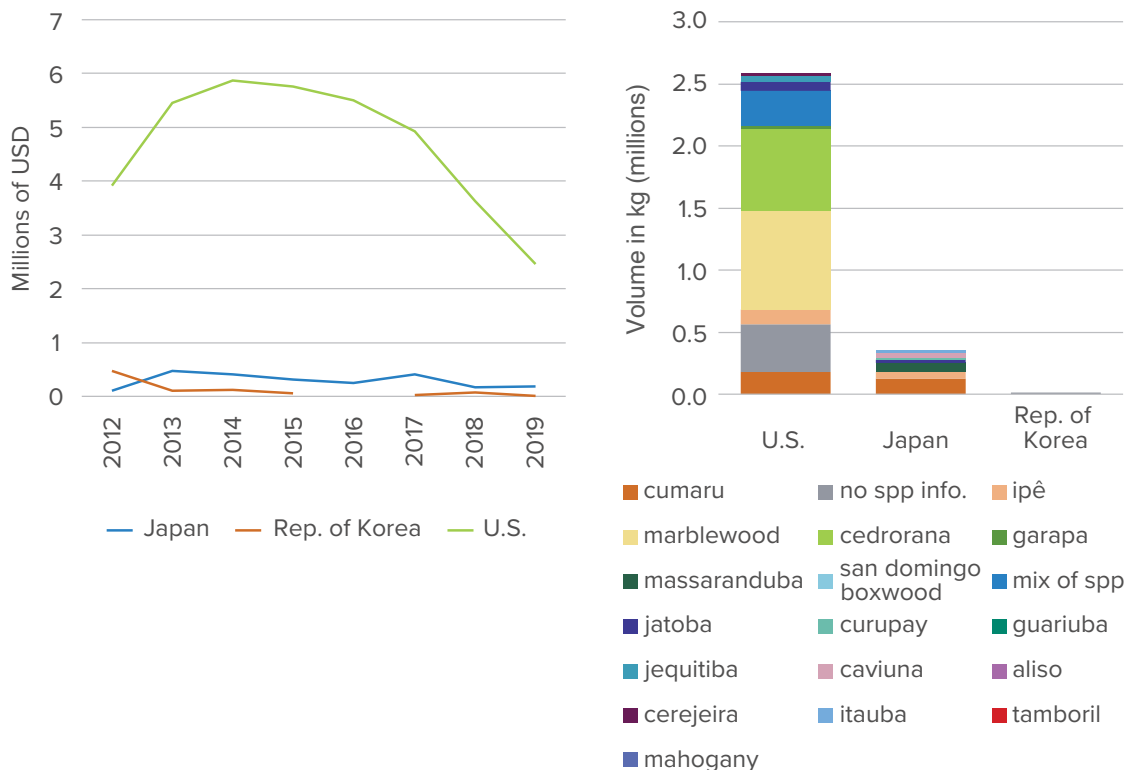
8 Bolivian flooring exports to the U.S. and Japanese markets have declined since 2016.

Bolivia’s flooring exports to the U.S. declined 55 percent by value between 2016 and 2019, and were valued at around US\$2.5 million in 2019. Exports to Japan saw a 26 percent decrease based on value over the same period.

Based on detailed shipment-level data for 2019, about 20 percent of Bolivia’s flooring was exported to the U.S. in 2019 (based on weight). Overall, there appears to be less direct trade in cumaru and ipê with the United States compared with EU + EFTA countries. Bolivian exporters reported higher volumes of flooring exports of marblewood and cedrorana, which accounted for over half of the export volume to the U.S. in 2019. Other species exported to the U.S. include garapa, jequitiba, and cerejeira.

Around 3 percent of Bolivia’s flooring exports were destined for Japan in 2019. Roughly 37 percent of the exports by weight were cumaru, and 20 percent were massaranduba. Other species exported to Japan include ipê, jatoba, curupay, caviuna, and itauba. Bolivian companies reported exporting just 13,620 kg of cumaru flooring to the Republic of Korea in 2019.

FIGURE 8 Bolivian flooring exports to US, Japan and Republic of Korea 2012-2019 (value in USD) and species breakdown for 2019



Source: UN Comtrade 2021 and Export Genius, 2021, compiled by Forest Trends 2021



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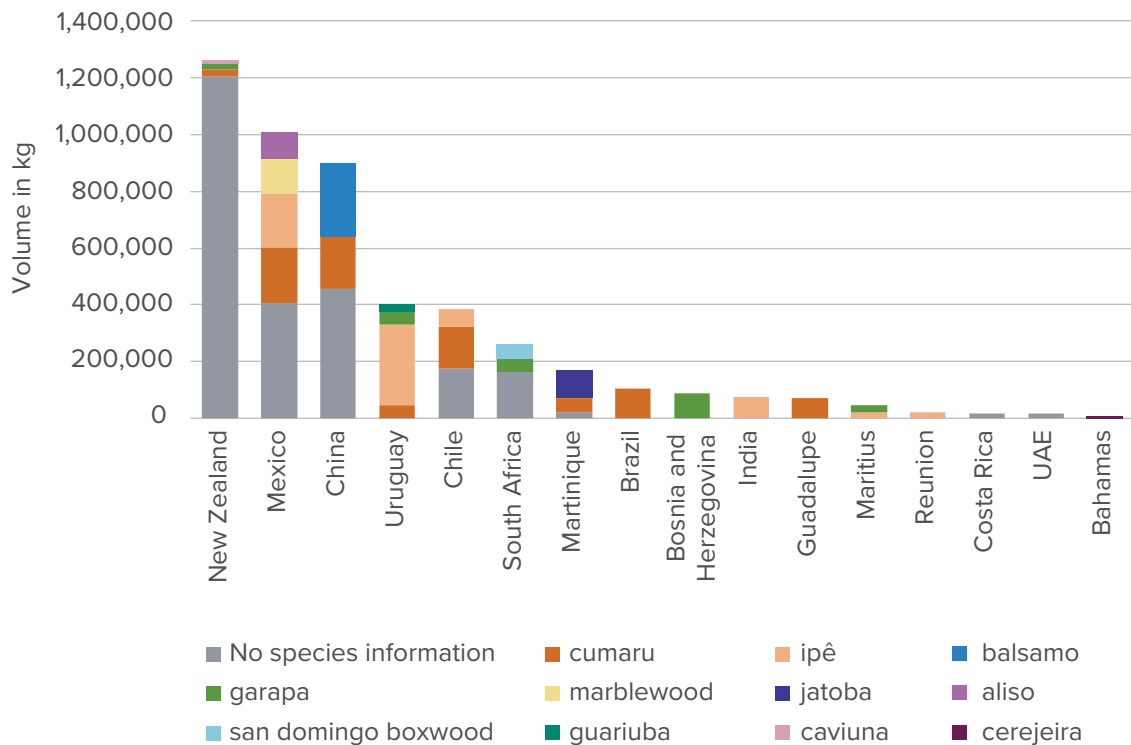
New Zealand has emerged as a new market for Bolivian flooring.

Between 2014 and 2019, exports to New Zealand rose over 1,200 percent by value. In 2019, New Zealand was the largest “unregulated” market destination for Bolivian flooring. Other key markets that were yet to implement import regulations in 2019 include Mexico, China, Uruguay, and Chile.

In 2021 the Government of New Zealand announced in the Asia-Pacific Economic Cooperation Expert Group on Illegal Logging and Associated Trade (EGILAT) forum that it expected to introduce a bill to Parliament that would introduce a national definition for legally harvested wood. The definition will apply to wood and wood products produced in and imported into New Zealand. It will also apply to wood and wood products exported from New Zealand. Subject to Cabinet approval for introduction, the Bill is on track for formal consultation in New Zealand’s Select Committee process in the first half of 2022, with enactment likely before the end of 2022. Staged commencement is proposed over several years.

There was extremely limited information available on Bolivian flooring exports to New Zealand, with 95 percent of the exports by weight not including any reported species information in the detailed shipment data. Where species were listed, these were cumaru, garapa, and caviuna.

FIGURE 9 Exports of flooring to markets without an operational timber legality import regulation, by species and weight



Source: Export Genius 2021, compiled by Forest Trends 2021



10 Just 47 Bolivian companies were responsible for all flooring exports in 2019 based on an analysis of detailed shipment data.

Of the 47 companies exporting flooring in 2019, over 90 percent reported exporting either cumaru or ipê. Around 27 of the companies reported exporting ipê, with 16 exporting cumaru. Eight companies reported exporting garapa, seven reported exporting jatoba, five curupay, and five san domingo boxwood.

There was a total of 66 global buyers of Bolivia's ipê and cumaru flooring in 2019.

Number of exporters	Species	Main markets
47	All reported species in 2019	France, U.S., Germany, the Netherlands, New Zealand, Mexico, Belgium, China, Italy, Uruguay
2	aliso	Germany, Mexico
1	balsamo	China
2	caviuna	Japan, the Netherlands, New Zealand
2	cedrorana	U.S.
3	cerejeira	U.S., UK, Bahamas
16	cumaru	France, Germany, Belgium, Italy, Mexico, China, U.S., Chile, Japan, Brazil, the Netherlands
5	curupay	Belgium, Portugal, Japan, the Netherlands
8	garapa	Germany, Bosnia and Herzegovina, Belgium, Uruguay, South Africa, Croatia
2	guariuba	Italy, Uruguay, Germany
27	ipê	France, Italy, Uruguay, Belgium, Mexico, Germany, U.S., India, Chile, Japan
1	itauba	Japan
7	jatoba	Martinique, U.S., Denmark, Germany, Japan.
1	jaquitiba	U.S.
1	mahogany	UK
4	marblewood	U.S., Mexico, Germany, Belgium, Italy, Croatia
2	massaranduba	Belgium, France, Japan, Italy
2	Mixed species	U.S.
3	No species declared	The Netherlands, New Zealand, France, China, Mexico, U.S.
5	san domingo boxwood	France, Germany, Italy, South Africa, Lithuania
1	tamboril	France



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Annex 1: Bolivia's 2019 exports of 4409 by species

Species where listed in product description	Scientific name	Weight of shipments in kg	Free on board (FOB) value of shipments in \$	% from overall shipments weight	% from overall shipments value
No species information	Unknown	6,248,647	8,149,589	35%	32%
cumaru	<i>Dipteryx</i> spp.	4,678,724	5,705,827	26%	22%
ipê	<i>Handroanthus</i> spp.; <i>Tabebuia</i> spp.	2,111,358	3,170,538	12%	12%
marblewood	<i>Zygia racemosa</i> (syn. <i>Marmaroxylon racemosum</i>)	1,189,986	1,188,791	7%	5%
garapa	<i>Apuleia leiocarpa</i>	750,415	949,701	4%	4%
cedrorana	<i>Cedrelinga catenaeformis</i>	663,133	3,095,635	4%	12%
san domingo boxwood	<i>Phyllostylon rhamnoides</i>	381,219	459,339	2%	2%
massaranduba	<i>Manilkara bidentata</i>	351,218	203,251	2%	1%
jatoba	<i>Hymenaea courbaril</i>	286,607	440,390	2%	2%
Mix of species	Unknown	283,249	1,229,074	2%	5%
balsamo	<i>Myroxylon balsamum</i>	258,902	65,399	1%	0%
aliso	<i>Alnus acuminata</i>	133,417	158,852	1%	1%
guariuba	<i>Clarisia racemosa</i>	129,615	178,723	1%	1%
curupay	<i>Anadenanthera colubrina</i>	123,737	36,632	1%	0%
caviuna	<i>Machaerium scleroxylon</i>	65,688	71,256	0%	0%
jequitiba	<i>Cariniana brasiliensis</i>	51,983	251,147	0%	1%
cerejeira	<i>Amburana cearensis</i>	46,208	118,849	0%	0%
itauba	<i>Mezilaurus itauba</i>	21,640	33,760	0%	0%
tamboril	<i>Enterolobium contortisiliquum</i>	19,987	20,972	0%	0%
mahogany	<i>Swietenia macrophylla</i>	15,976	17,319	0%	0%



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ACKNOWLEDGEMENTS

The authors would like to thank Kerstin Canby and Catherine Rutherford for review. In addition, thanks to Nicholas Goodman for copy editing, and Eszter Bodnar for formatting and graphic design. Support for this publication came from the U.S. Department of State. The views expressed in this report reflect those of the authors, and do not necessarily reflect the views of Forest Trends' donors or our external reviewers.

With support from:



Forest Trends works to conserve forests and other ecosystems through the creation and wide adoption of a broad range of environmental finance, markets and other payment and incentive mechanisms. This brief was released by Forest Trends' Forest Policy, Trade, and Finance program, which seeks to create markets for legal forest products while supporting parallel transformations away from timber and other commodities sourced illegally and unsustainably from forest areas.

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