SUMMARY OF LEGALITY RISKS

Risk Score: 86.9 (Higher Risk)\(^1\)
Conflict State: NO
Log Export Ban in Effect: YES\(^2\)
Import Regulation in Effect: NO

- Despite a strong legislative framework for forest management, illegal logging is still considered widespread in Gabon. Governance reforms are underway with political commitment to achieve certification for all forest concessions by 2022.
- NGOs continue to document sector-wide illegalities, widespread corruption, and illegal timber being sold on international markets.
- There is currently no mandated independent forest monitor; therefore, information on company compliance with national legislation is limited.
- Over the last fifteen years, there has been a substitution of European trading partners by Asian - mainly Chinese operators - and Gabon is now the one of the most important destinations for Chinese forestry sector investment in Africa.
- Despite a rise in trade with Asia, Gabon still exports high risk timber to Europe and the U.S. and there is a risk that timber sourced from Gabon is used in Chinese, Vietnamese and Indian-manufactured products that are likely entering European and U.S. markets.

TRADE PROFILE OF FOREST PRODUCTS\(^b,c,3,4\)

Total Imports (2019): $37.00 million
$207.49 million (32.5%) declared as exported to “regulated markets”\(^d\)

SUMMARY OF HIGHEST PRODUCT-LEVEL RISKS

Exports – Top Products Exported to the US by 2019 Value\(^6\)
- Sawnwood (HS4407)
- Veneer (HS4408)
- Plywood (HS4412)
- Wood Furniture – Office (HS940330)
- Wood Furniture – Bedroom (HS940350)
- Flooring, Molding & Strips (HS4409)
- Other Articles of Wood (HS4421)
- Wood Furniture – Seating (HS940161)

Exports of logs, boules and through-cut logs have been banned since 2011.\(^6\) Gabon has banned the export of moabi, ozigo, and kevazingo at least since April 2019.\(^6,7,8\)
Illegal logging and trade affect many timber species, but highly valuable - often rare and endangered - species that are protected under harvest and/or trade regulations are a key target and at an elevated risk for illegality. The following species are either currently, or have recently, been protected in Gabon.

**CITES-Listed Species (Appendix II):**
- **Rosewood** *(Dalbergia spp.)*
- **Bubinga or kevazingo** *(Guibourtia spp.)*
  - *Guibourtia demeusei*
  - *Guibourtia pellegriniana*
  - *Guibourtia tessmannii*

**Banned Species:**
- **Afo or Ovoga** *(Poga oleosa)*
- **Andok** *( Irvingia gabonensis)*
- **Bubinga or Kevazingo** *(Guibourtia spp.)*
- **Douka or Makoré** *(Tieghemella africana)*
- **Moabi** *(Baillonella toxisperma)*
- **Ozigo** *(Dacryodes buettneri)*

**Other High-Risk Species of Note:**
- **Alone** *(Rhodognaphalon brevicuspe)*
- **Azobe** *(Lophira alata)*
- **Bahia** *(Mitragyna ledermannii)*
- **Bilinga** *(Nauclea diderrichii)*
- **Bodioa** *(Anopyxis klaineana)*
- **Bosse** *(Guarea spp.)*
- **Dibetou** *(Lovoa trichilioides)*
- **Doussie** *(Afzelia africana)*
- **Khaya** *(Khaya anthotheca, Khaya ivorensis, Khaya senegalensis)*
- **Okoumé** *(Aucoumea klaineana)*
- **Sapele** *(Entandrophragma cylindricum)*
- **Sipo** *(Entandrophragma utile)*
- **Tiama** *(Entandrophragma angolense, Entandrophragma congoense)*
- **Zingana** *(Microberlinia brazzavillensis)*

All tropical hardwood exports should be considered high-risk based on overall legality risk in Gabon. Robust third party certification can be considered as a tool to help mitigate this high risk, but should not constitute sufficient due diligence for legality in and of itself.
GABON’S TOP SOURCE MARKETS FOR FOREST PRODUCTS BY IMPORT VALUE (2019)

EU + EFTA: 14M
China: 12M
India: 4M
Tunisia: 2M
Thailand: 2M
UAE: 2M
Turkey: 2M
South Africa: 2M
Malaysia: 2M
Morocco: 2M
Other Markets: 2M

GABON’S TOP SOURCE MARKETS FOR TIMBER PRODUCTS BY IMPORT VALUE (2019)

EU + EFTA: 4M
China: 3M
UAE: 1M
Malaysia: 1M
Turkey: 1M
USA: 1M
Morocco: 1M
India: 1M
Brazil: 1M
Other Markets: 1M

Legend:
- Other Forest Products
- Plywood
- Joinery Products
- Sleepers
- Wood Furniture
- Paper
- Other Timber Products
- Packing Cases and Pallets
- Fiberboard
- Marquetry
- Other Articles of Wood
- Logs
- Tools
- Plywood
- Joinery Products
- Sleepers
- Wood Furniture
**GABON’S TOP DESTINATION MARKETS FOR TIMBER PRODUCTS BY EXPORT VALUE (2019)**

- **China**: $250M
- **EU + EFTA**: $150M
- **India**: $100M
- **Malaysia**: $50M
- **Morocco**: $25M
- **Philippines**: $15M
- **South Africa**: $10M
- **UAE**: $5M
- **USA**: $2M
- **Other Markets**: $1M

Trade Value (US$)

**HIGH-RISK EXPORTS: LOG EXPORTS IN YEARS IN WHICH GABON HAD AN ACTIVE LOG EXPORT RESTRICTION (2015-2019)**

- **2016**: $5M
- **2017**: $7M
- **2018**: $9M
- **2019**: $9M

Trade Value (US$)
Gabon is a relatively small African nation (30th in size in Africa), with a national population of just 1.5 million, or less than 7 inhabitants per hectare on average. Gabon is home to the ecologically significant Congo Rainforest system that it shares with its neighbors: Cameroon, Equatorial Guinea, and the Republic of the Congo. The Congo Rainforest is the second-largest connected forest system in the world (surpassed only by the Amazon). Due to a forest cover estimated at 88 percent of the national landmass (approximately 23.5 million hectares), the Gabonese woodlands are equivalent in size to the forests of the Republic of the Congo, and larger than those in Cameroon.

• Despite a strong legislative framework for forest management, illegal logging is still considered widespread in Gabon. Governance reforms are underway with political commitment to achieve certification for all forest concessions by 2022.

In 2001, the country adopted a Forest Code (Law 016/2001) that set “sustainability” as a cornerstone of the forest management objectives and has since been considered as one of the exemplary regulatory guidelines for sustainable forestry in Central Africa. The new law divides the Gabonese forest into two main categories of:

1. Permanent Forest Estate including the concessions contracted out by the State but used and managed by individuals or businesses, and, protection forests preserved for national parks; and

2. Rural Forest Domain which consists of open-access forest for local communities.

The Forest Code also sets out a contractual framework, which became automatically applicable to all operators in 2006 and serves as the guidelines under which all harvesting, and wood processing entities must operate. The law also provides for a transition period for concessions to develop management plans, inventories and sustainable harvest plans, during which a permit is considered a provisional management and exploitation concession known as a Convention Provisoire d’Aménagement et de l’Exploitation Forestier or CPAET. As of March 2020, around 15 million hectares had been allocated as logging concessions to 40 companies, with an estimated 1.7 million m³ of timber reportedly extracted annually from the concessions. Roughly 1.9 million hectares are Forest Stewardship Counsel (FSC) certified as of 2021, 10.7 million hectares are CFADs, operating with a sustainable management plan, 1.5 million ha are reportedly CPAETs, considered under a temporary transition period as management plans are developed and 1.3 million hectares are not currently under management yet. To date, there are 53 community forests with a valid management plan, another 50 developing management plans and about 100 more under consideration. As such, logging rights are estimated to cover approximately 60 percent of the national woodlands and 50 percent of the country.

Commercial timber exploitation began in the late 19th century and okoumé (Aucoumea klaineana) was introduced to the international market in the early 20th century. The okoumé tree is found in smaller quantities in neighboring countries, but can be found in more than 80 percent of Gabon’s forests. As a result, Gabon has supplied up to 90 percent of the world’s okoumé, while also producing other hardwoods such as mahogany, azobé and padouk.

<table>
<thead>
<tr>
<th>Forestry Sector</th>
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<tbody>
<tr>
<td><strong>Forested Area:</strong> 23.5 million ha (14.4% protected)</td>
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<td><strong>Deforestation Rate:</strong> 0.05% annually</td>
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<td>• 3.5 million ha publicly-owned (100%)</td>
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<th>Domestic Production:</th>
</tr>
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<tbody>
<tr>
<td>• Logs: 2.80 million m³ (2019)</td>
</tr>
<tr>
<td>• Sawnwood: 1.1 million m³ (2019)</td>
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<tr>
<td>• Wood Fuel: 1.1 million m³ (2019)</td>
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<tr>
<td>• Veneer: 404 thousand m³ (2019)</td>
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<td>• Plywood: 64 thousand m³ (2019)</td>
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<tr>
<td>• Charcoal: 24 thousand metric tonnes (2019)</td>
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<table>
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Timber Legality (continued)

Gabon began negotiating a Forest Law Enforcement Governance and Trade (FLEGT) Voluntary Partnership Agreement (VPA) with the European Union (EU) in 2010 and negotiations remain ongoing. Progress has been reportedly slow and there has been no negotiation session since 2011. However, in November 2019 the Forest Ministry expressed intention to relaunch negotiations in a letter to the EU.

In 2017, Gabon and the Central African Forest Initiative (CAFI) signed a Letter of Intent for $18 million to protect the country’s forests. The Letter of Intent is designed to support Gabon in developing a national land-use plan, a system to monitor forests, and improving forest governance. The lack of a national land use plan has resulted in overlapping oil, mining, and forestry concessions, which, in some cases, also overlap with protected areas. In 2019, Gabon pledged to achieve Forest Stewardship Council (FSC) certification for all forest concessions by 2022.

- NGOs continue to document sector-wide illegalities, widespread corruption, and illegal timber.

Illegal logging, mining and commercial hunting activities continue to pose a threat. The results of an investigation looking at illegality in the timber sector was released in 2011 and prepared by the NGO Brainforest. In 2019, the Environmental Investigation Agency’s (EIA) report - Toxic Trade - presented specific evidence of sector-wide illegalities including tax evasion, money laundering and corruption. Specific illegalities related to the Dejia Group’s operation documented in the report include tax evasion, money-laundering and corruption as well as overharvesting.

The “Raw Intelligence” video series produced by EIA indicates that tax evasion and corruption are very common in the Gabonese timber industry.

Crackdowns by the Gabonese authorities targeting logging companies in 2017 exposed further evidence of illegality in the sector, including the illegal felling of protected species. In 2019, Gabon's president sacked the vice-president and forestry minister over a timber-smuggling scandal surrounding the seizure and subsequent theft of 300 containers of kevazingo timber which are illegal to export.

- There is currently no mandated independent forest monitor; therefore, information on company compliance with national legislation is limited.

Open-source information from the Gabonese about domestic production and exports is limited. There is currently no formal Independent Monitor of Forest Law Enforcement & Governance (IM-FLEG) in place in Gabon (unlike in Cameroon, Republic of the Congo and the Democratic Republic of the Congo). For this reason, there is limited official information available on compliance with legislation by the companies involved in licensed industrial logging in the country.

Despite the absence of a mandated independent forest monitor in Gabon, forest monitoring missions have been carried out by the Gabonese civil society organization Brainforest, as a non-mandated independent forest monitor. The field reports and observations are available online via the Open Timber Portal and show a range of concerns reported in 2019 covering timber harvesting, rights to exploit, planning and decision-making processes and law enforcement concerns.

- Over the last fifteen years, there has been a substitution of European trading partners by Asian - mainly Chinese operators - and Gabon is now the one of the most important destinations for Chinese forestry sector investment in Africa.

European trading partners have been increasingly substituted by Asian companies over the past fifteen years. Historically, France became a specialized international importer of Gabonese plywood made of okoumé. China began to import significant volumes of Gabon's logs from the mid-1990s. An almost immediate consequence of this new demand was an intensification of logging activities, the national production that was approximately 2 million m³ per year in the 1990s doubled to over 4 million m³ annually over the last few years. Chinese investors first penetrated the Gabonese market by taking over several small companies in financial difficulties and then obtained permits and concessions from the Gabonese administration, reportedly in disregard of existing norms.

Gabon has been the top destination for Chinese investment in the forestry sector in Africa. The country accounts for almost 23 percent of the forestry sector investment approvals. There has also been an increase in the range of tree species that are now extracted and exported for the Chinese market with reports suggesting that okan, padouk, azobe and moabi are now in demand in China. As of 2011, Chinese-owned companies directly held rights to about 24 percent of Gabon’s forests, more
Timber Legality (continued)

than half of which belong to just five companies. By 2019, 74 percent of all forestry permits were allocated to Chinese companies. Chinese-owned concessions are especially concentrated in the Northeastern and Southwest regions, with the Northeastern region renowned for high-value timber. In addition, other companies are backed by Chinese capital, and together may ship more than 1 million m³ per year, or 70 percent of the country’s timber exports.  

In response to the escalating logging rates in Gabon, the government banned raw timber exports in an attempt to promote in-country processing in 2010. These export restrictions led, in part, to a 59 percent drop in production between 2007 and 2012. This decision has had immediate consequences on the trading relationships between Gabon and China. Since log exports from Gabon have been prohibited, the export of Gabon’s value-added forest products has undoubtedly increased. At the same time, China's demand for logs has shifted to other African countries. With the log export ban, Gabon set an example that has been often referred to by various African countries in order to promote domestic processing.

Indian imports from Gabon, particularly of veneer, have been rapidly increasing since 2018, and Indian companies have invested heavily in facilities within Gabon itself, settling in special economic zones and building sawmills, kiln-drying facilities, and furniture, veneer and plywood manufacturing units. In the Nkok Special Economic Zone, 17 out of 96 industrial investors in 2016 were from India. Gabonese species such as okoumé have only recently been accepted by the Indian market for panels and ply veneers, replacing imports from countries such as Indonesia, Papua New Guinea, and the Solomon Islands.

• Despite a rise in trade with Asia, Gabon still exports high risk timber to Europe and the U.S. and there is a risk that timber sourced from Gabon is used in Chinese, Vietnamese and Indian-manufactured products that are likely entering European and U.S. markets.

France remains a significant export market for Gabon, but Belgium became the top destination for Gabonese wood in 2019. Authorities enforcing the European Union Timber Regulation (EUTR) reported fourteen breaches of the EUTR in 2019 related to imports from Gabon.

There is evidence that India’s furniture and handicraft industry is increasingly relying on imports of high-risk timber species, including timber sourced from Gabon, to manufacture products exported to the U.S., EU and Australia.

In this context, importers of Gabonese timber into the EU and the United States should integrate a robust due diligence system. This system would include inter alia:

• Full traceability of the timber back to the concession and tree stump;
• Enquiry about the validity of the official document presented;
• Third-party on-the-ground evaluation of the logging practices.

REPORTS & ADDITIONAL RESOURCES

A list of relevant reports and additional online tools to complement this country report are also available at the IDAT Risk website: https://www.forest-trends.org/fptf-idat-home/.

Key additional reading:

METHODOLOGY & TERMINOLOGY NOTES

Risk scores reflect Preferred by Nature’s Timber Risk Assessment which measures the risk of illegality occurring in 21 areas of law relevant to timber legality, as well as Forest Trends’ national governance scores which provide an average relative governance and corruption risk score for 211 countries globally. Preferred by Nature’s scores have been flipped to ensure compatibility with Forest Trends’ national governance scores, where higher scores are associated with greater governance and corruption challenges. An average of both the Preferred by Nature and Forest Trends scores has been calculated for 66 countries where both are available as of 2021. For all other countries, the risk score reflects Forest Trends’ national governance scores. Countries scoring less than 25 are considered “Lower-Risk,” countries scoring between 25 and 50 are “Medium-Risk” and countries scoring above 50 are “Higher-Risk.” It is important to note that it is possible to source illegal wood from a well-governed, “Lower-Risk” state and it is also possible to source legal wood from a “Higher-Risk” country. As such, the risk scores can only give an indication of the likely level of illegal logging in a country and ultimately speaks to the risk that corruption and poor governance undermines rule of law in the forest sector.

The term “forest products” is used to refer to timber products (including furniture) plus pulp and paper. It covers products classified in the Combined Nomenclature under Chapters 44, 47, 48 and furniture products under Chapter 94. While the term “forest products” is often used more broadly to cover non-timber and non-wood products such as mushrooms, botanicals, and wildlife, “forest products” is used to refer to timber products plus pulp and paper in this dashboard.

Except where otherwise specified, all trade statistics and charts data on Gabon’s trade with China is sourced from the General Administration of Customs, P.R. China, compiled and analyzed by Forest Trends. All other data comes from UN Comtrade, compiled and analyzed by Forest Trends. Except where otherwise specified, the charts and statistics in this dashboard are derived from globally-reported data (i.e. global imports are utilized as a proxy for Gabonese exports, and global exports are utilized as a proxy for Gabonese imports).

Regulated markets reflect countries and jurisdictions that have developed operational measures to restrict the import of illegal timber. As of 2021, this included the U.S., Member States of the European Union (as well as the United Kingdom, Iceland, Liechtenstein, Norway and Switzerland), Australia, Canada, Colombia, Indonesia, Japan, Malaysia, South Korea and Vietnam. Some measures are more comprehensive in scope, implementation, and enforcement than others.

It is unclear if the 2019 ban restricts the export of all products of these species, or just unprocessed wood products. One media source (Le Nouveau Gabon, 2016) noted that the text allows for the export of these species after “tertiary transformation”. This would almost certainly maintain a ban on the export of logs and sawnwood, and potentially on other semi-processed potential timber products as well.

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.

Independent forest monitoring (IFM) has become a component of the Voluntary Partnership Agreements (VPAs), which are a pillar of the EU’s Forest Law Enforcement, Governance and Trade (FLEGT) Action Plan. The Action Plan entered into force in 2003 in response to rising international concerns about the social, economic and environmental impacts of illegal logging and related trade. Each VPA is a bilateral trade agreement negotiated between the EU and a timber-exporting country. While parties enter into a VPA voluntarily, the agreement becomes legally binding when both parties have ratified it.

WORKS CITED


30 Conseil National Climat Gabonais, “Gabon’s Proposed National REDD+ Forest Reference Level”.

31 Conseil National Climat Gabonais, “Gabon’s Proposed National REDD+ Forest Reference Level”.


This Timber Legality Country Risk Dashboard (Dashboard) was drafted by Forest Trends and funded by a grant from the United States Department of State, Bureau of Oceans and International Environmental and Scientific Affairs. The opinions, findings, and conclusions stated herein are those of the authors and do not necessarily reflect those of the United States Department of State or any other party. The United States supports efforts to raise awareness of and combat global illegal logging and associated trade. This dashboard contributes to these ongoing efforts.

The Dashboards have been compiled from publicly available information sources to support risk assessments on the legality of timber products entering international supply chains. The Dashboards are for educational and informational purposes only. The Dashboards have been drafted with input from the Environmental Investigation Agency (EIA) and are subject to external peer review. The Dashboards will be updated periodically based on newly available information.

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