Introduction

- Cambodia covers an area of 181,035 km²
- Forest resources in Cambodia covered an area around 1.1 million ha or 57.07% of the total land area
History of Forest Cover Change

- 61.15% in 2002
- 59.09% in 2006
- 57.07% in 2010
Land and Forest Classification

- Permanent forest estate: Permanent forest reserve and private forest
- Permanent forest reserve
  - Production forest
  - Protection forest
  - Conversion forestland
- Protected area
Source of timber and timber trade flow

## Import

<table>
<thead>
<tr>
<th>Products</th>
<th>2007</th>
<th>2008</th>
<th>2009</th>
<th>2010</th>
<th>2011</th>
<th>2012*</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sawn timber</td>
<td>500</td>
<td>14</td>
<td>635</td>
<td>774</td>
<td>250</td>
<td>1000</td>
</tr>
<tr>
<td>Processed timber</td>
<td>0</td>
<td>0</td>
<td>465</td>
<td>0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Logs</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>0</td>
<td>50</td>
<td>0</td>
</tr>
<tr>
<td>Square Logs</td>
<td>0</td>
<td>0</td>
<td>382</td>
<td>100</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Total (m³)</td>
<td>500</td>
<td>14</td>
<td>1483</td>
<td>874</td>
<td>300</td>
<td>1000</td>
</tr>
</tbody>
</table>

## Export

[Graph showing export data]
# Source of timber and timber trade flow

## Domestic demand

<table>
<thead>
<tr>
<th>Source of Timber</th>
<th>Tons</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timber</td>
<td>400,000</td>
<td>6</td>
</tr>
<tr>
<td>Industrial fuel wood (garment and brick industry around Phnom Penh)</td>
<td>1,000,000</td>
<td>14</td>
</tr>
<tr>
<td>Rural fuel wood</td>
<td>5,000,000</td>
<td>70</td>
</tr>
<tr>
<td>Fuel wood and charcoal in Phnom Penh</td>
<td>700,000</td>
<td>10</td>
</tr>
<tr>
<td><strong>TOTAL</strong></td>
<td>7,100,000</td>
<td>100</td>
</tr>
</tbody>
</table>
1. Economic Land Concessions for agri-industrial crops

Legend:
- Main river
- Provinces boundary
- Community forestry (308,564 ha)
- ELC (app. 1,800,000 ha)
- Protected forest (1,646,332 ha)
- Protected area (3,324,606 ha)
- Forest concession (3,374,382 ha)

The source for community forestry, economic land concession, protected area, and forest concession are from open development Cambodia while protected forest is from Forestry Administration.
2. Social Land Concessions (SLCs)

Table 5: Growth of SLCs being granted. (Source: ADHOC).

<table>
<thead>
<tr>
<th>Year</th>
<th>Number of SLCs granted</th>
<th>Amount in Hectares</th>
</tr>
</thead>
<tbody>
<tr>
<td>2011</td>
<td>No data</td>
<td>44,897</td>
</tr>
<tr>
<td>2012</td>
<td>38</td>
<td>100,790</td>
</tr>
<tr>
<td>2013</td>
<td>485</td>
<td>626,824</td>
</tr>
</tbody>
</table>
3. Clearance for hydropower, developmental and infrastructure purposes

<table>
<thead>
<tr>
<th>Dam Name</th>
<th>Volume (m$^3$) 2011</th>
<th>Volume (m$^3$) 2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stung Ahtai</td>
<td>5,679</td>
<td>8,179</td>
</tr>
<tr>
<td>Stung Tah Tai</td>
<td>n.a</td>
<td>217</td>
</tr>
<tr>
<td>Russei Chrom Kraum</td>
<td>1,189</td>
<td>n.a</td>
</tr>
<tr>
<td>Kirirom 3</td>
<td>913</td>
<td>n.a</td>
</tr>
<tr>
<td><strong>Totals</strong></td>
<td><strong>7,781</strong></td>
<td><strong>8,396</strong></td>
</tr>
</tbody>
</table>
4. Annual bidding coupes

• Once allocated, ABCs include management planning and forest management requirement, but not direct conversion of forest

• Forest Administration conduct inventories, tree-marking and social and environmental impact assessments for annual coupes and prepare one-year management plans.

• As of 2009 the Forest Administration had issued three bidding coupe management plans to three separate companies covering, in total, 5000 hectares.
Concessions for Mining in Cambodia

Map Data Sources:
- Topographical Map 1:100,000
- Base Map 2011

Mining Data Sources:
- MIME
- Companies Website
- Other Contract

Paper size: A4 Landscape
Projection UTM
Datum WGS 1984
Zone 48N
Scale 1 : 2,700,000

Legend
Data Classification
Secondary Source Data (117)
Primary

Updated: 01 July 2014
6. Plantation development.

Annual forest plantations established in Cambodia from 1985 to 2011
7. Illegal logging

- Multiple factors driving illegal logging in Cambodia, including:
  - overcapacity of primary processing industries – high demand
  - insufficient detection of criminal activities
  - weak penalties and poverty

- The allocation of ELCs appears to provide a cover for some illegal logging activity.
8. Migrant encroachment

• Land not currently under management is traditionally seen as an open-access resource that can be claimed by whoever clears the forest.

• As migrants occupy land illegally, discussing land tenure and land-use planning are made more difficult.

• Migration rates seem to have been falling since 2008, possibly due to the global economic slowdown and resulting reduction in demand.
Conclusions

Information and Data

• Support and improve the supply of more reliable data

Engagement with the Cambodian Forest Industry

• Define common goals and build compatible and mutually-beneficial alternatives to the current situation

Engagement with investors, financial institutions and consumer markets

• promote and incentivise due-diligence, the rejection of corrupt and illegal processes.

• Apply pressure on the RGC to reduce risks, and encourage greater levels of transparency.
Thank you!

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NEPCon works to ensure responsible use of natural resources and secure sustainable livelihoods by transforming land-use, business practises and consumer behaviour.