Forest Land Conversion and Conversion Timber Estimates: Cambodia Case Study

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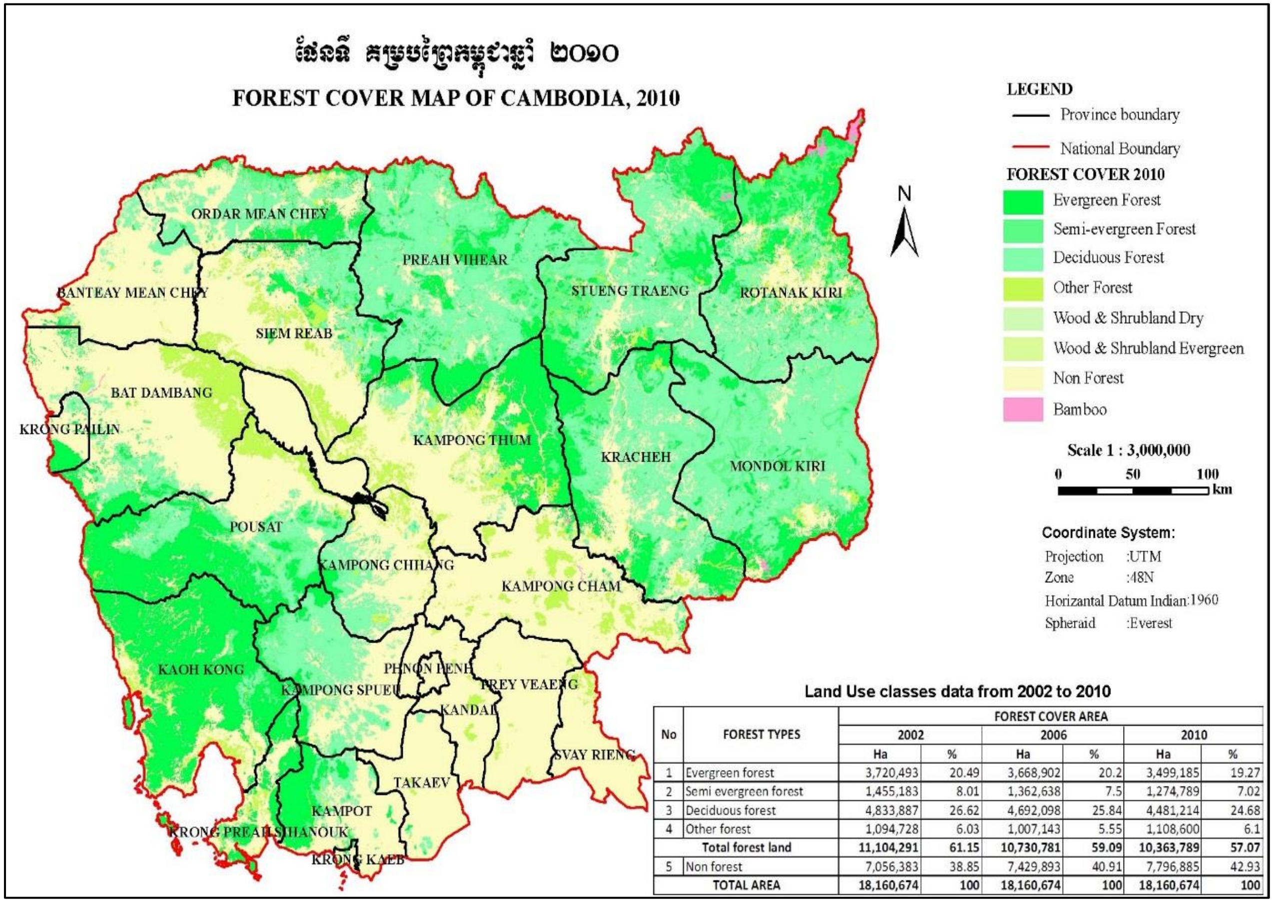
Introduction

- Cambodia covers an area of 181,035 km^2
- Forest resources in Cambodia covered an area around 1.1 million ha or 57.07% of the total land area

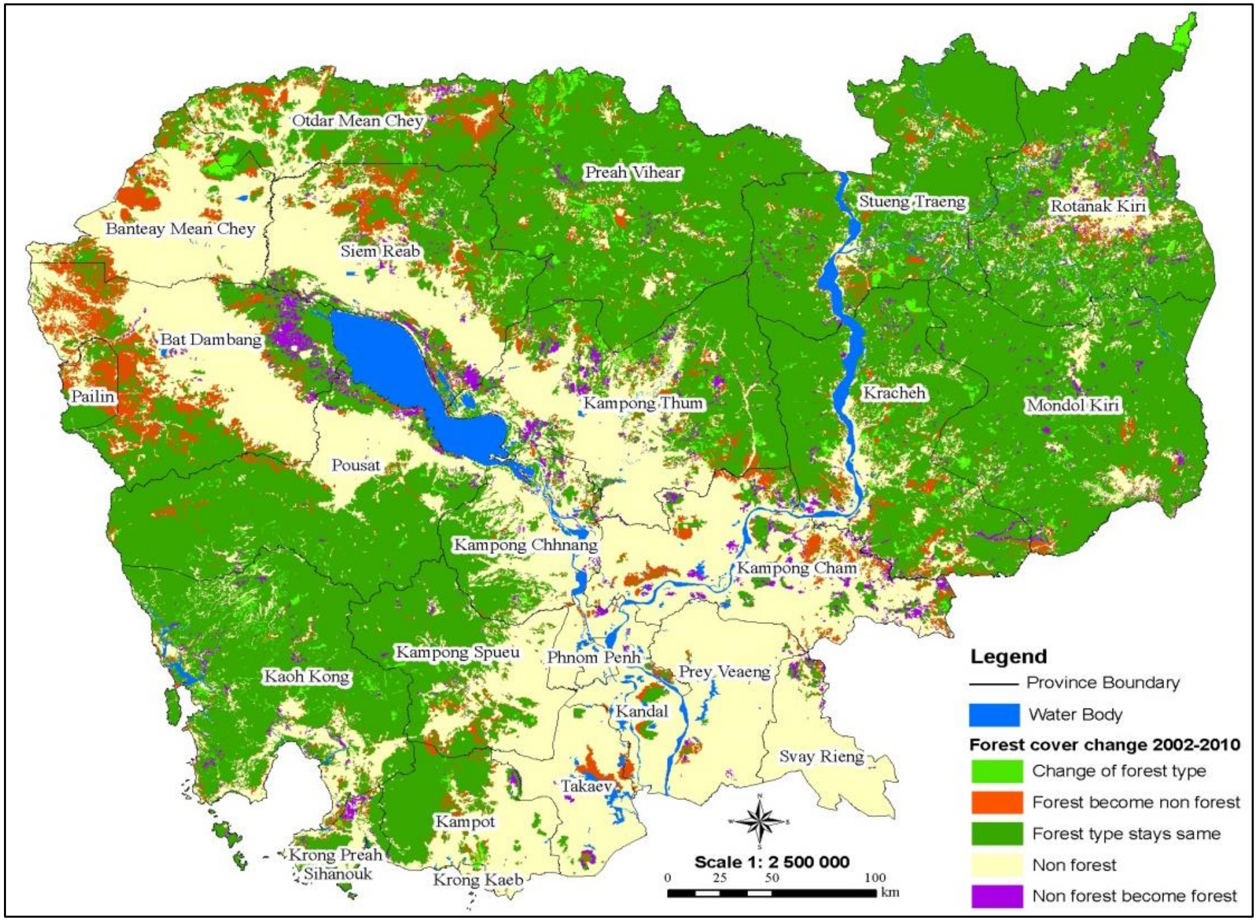


Land Use classes data from 2002 to 2010

No	FOREST TYPES	FOREST COVER AREA					
		2002		2006		2010	
		Ha	%	Ha	%	Ha	%
1	Evergreen forest	3,720,493	20.49	3,668,902	20.2	3,499,185	19.27
2	Semi evergreen forest	1,455,183	8.01	1,362,638	7.5	1,274,789	7.02
3	Deciduous forest	4,833,887	26.62	4,692,098	25.84	4,481,214	24.68
4	Other forest	1,094,728	6.03	1,007,143	5.55	1,108,600	6.1
	Total forest land	**11,104,291**	**61.15**	**10,730,781**	**59.09**	**10,363,789**	**57.07**
5	Non forest	7,056,383	38.85	7,429,893	40.91	7,796,885	42.93
	TOTAL AREA	**18,160,674**	**100**	**18,160,674**	**100**	**18,160,674**	**100**

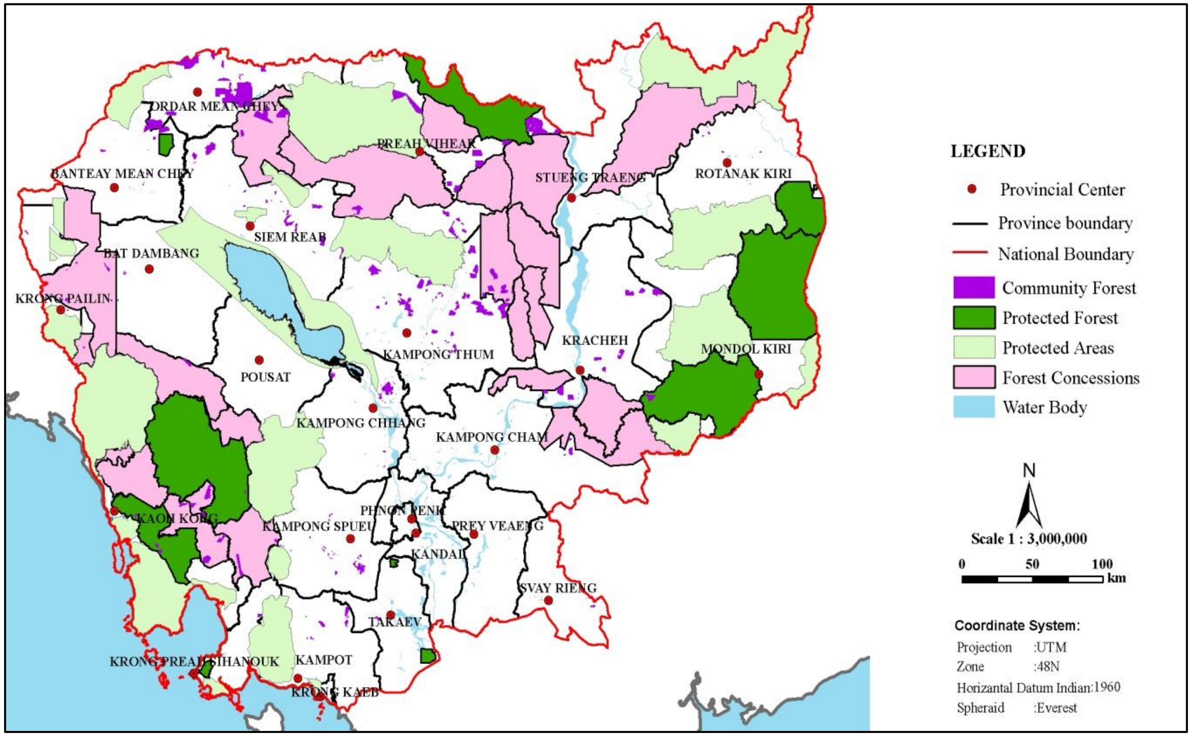
History of Forest Cover Change

- 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



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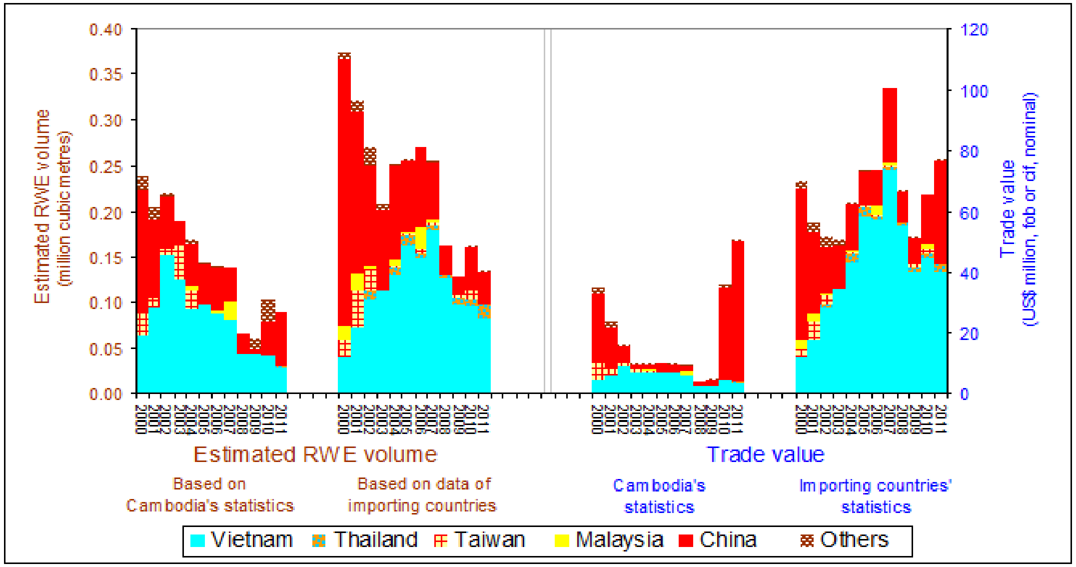
Source of timber and timber trade flow

Import

Products	2007	2008	2009	2010	2011	2012*
Sawn timber	500	14	635	774	250	1000
Processed timber	0	0	465	0	0	0
Logs	0	0	0	0	50	0
Square Logs	0	0	382	100	0	0
Total (m3)	**500**	**14**	**1483**	**874**	**300**	**1000**

Export

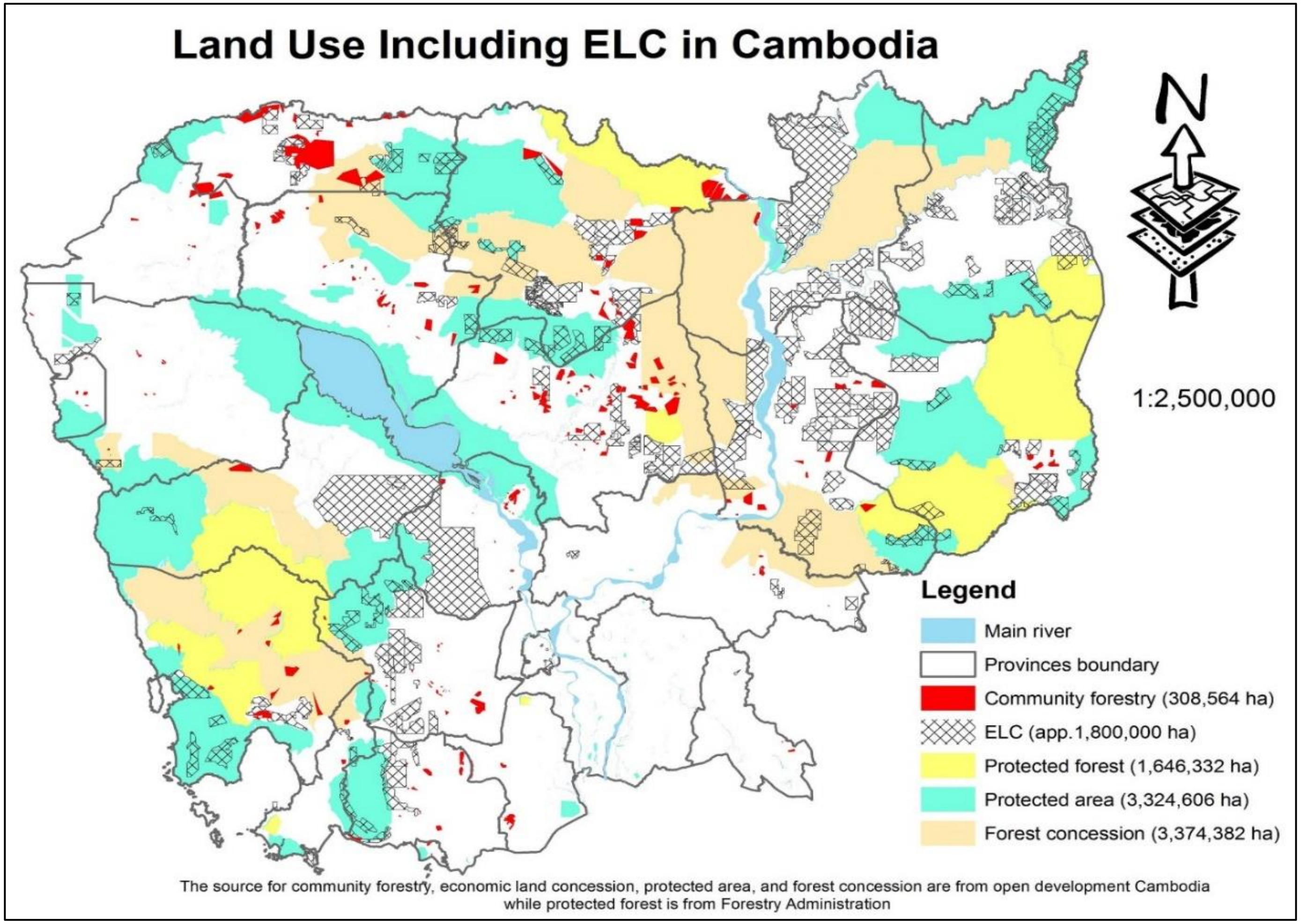


Source of timber and timber trade flow

Domestic demand

	Tons	Percentage
Timber	400,000	6
Industrial fuel wood (garment and brick industry around Phnom Penh)	1,000,000	14
Rural fuel wood	5,000,000	70
Fuel wood and charcoal in Phnom Penh	700,000	10
TOTAL	7,100,000	100

1. Economic Land Concessions for agri-industrial crops



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2. Social Land Concessions (SLCs)

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

	Number of SLCs granted	Amount in Hectares
2011	No data	44,897
2012	38	100,790
2013	485	626,824

3. Clearance for hydropower, developmental and infrastructure purposes

Dam Name	Volume (m3) 2011	Volume (m3) 2012
Stung Ahtai	5,679	8,179
Stung Tah Tai	n.a	217
Russei Chrom Kraum	1,189	n.a
Kirirom 3	913	n.a
Totals	7,781	8,396

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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.

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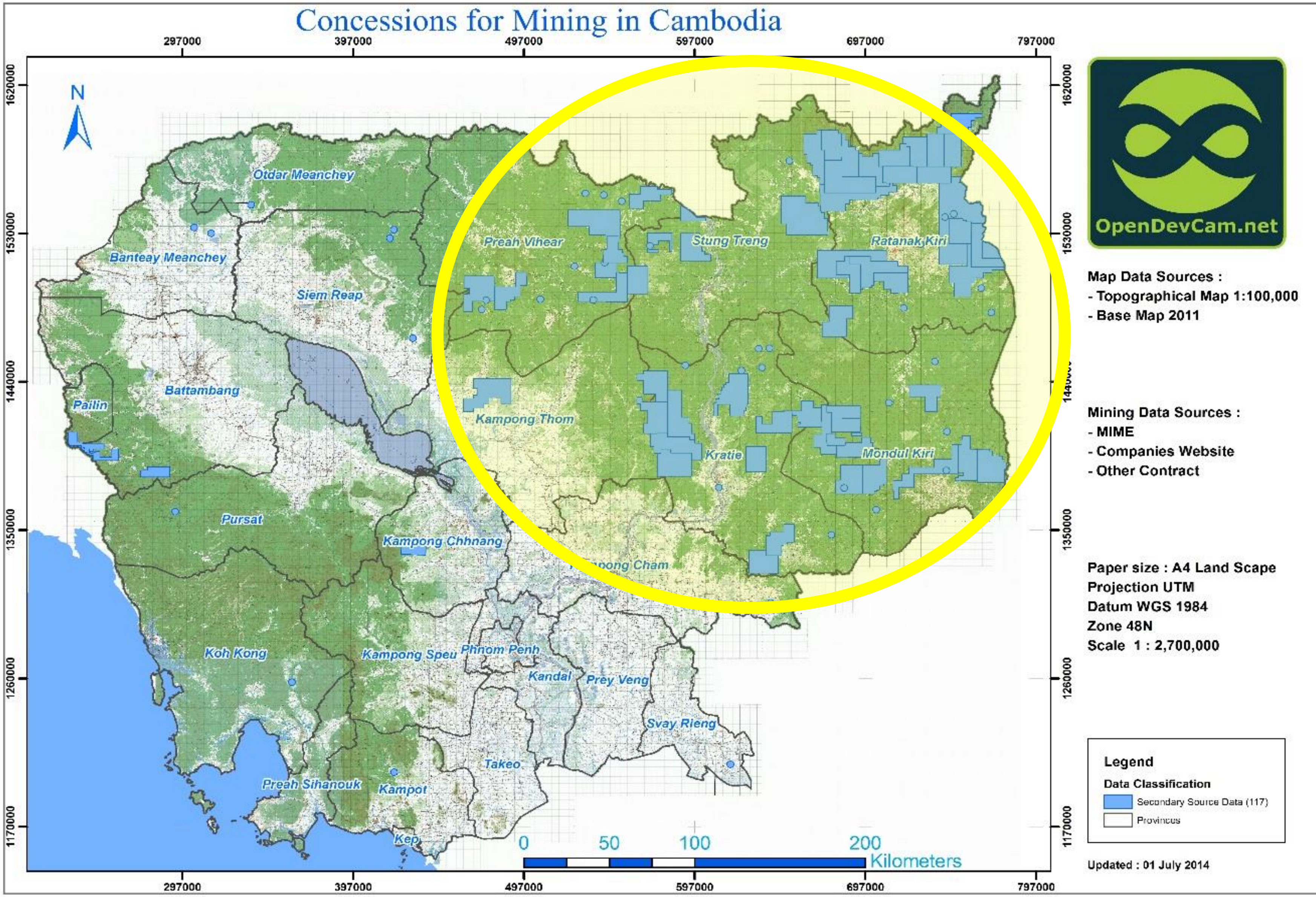
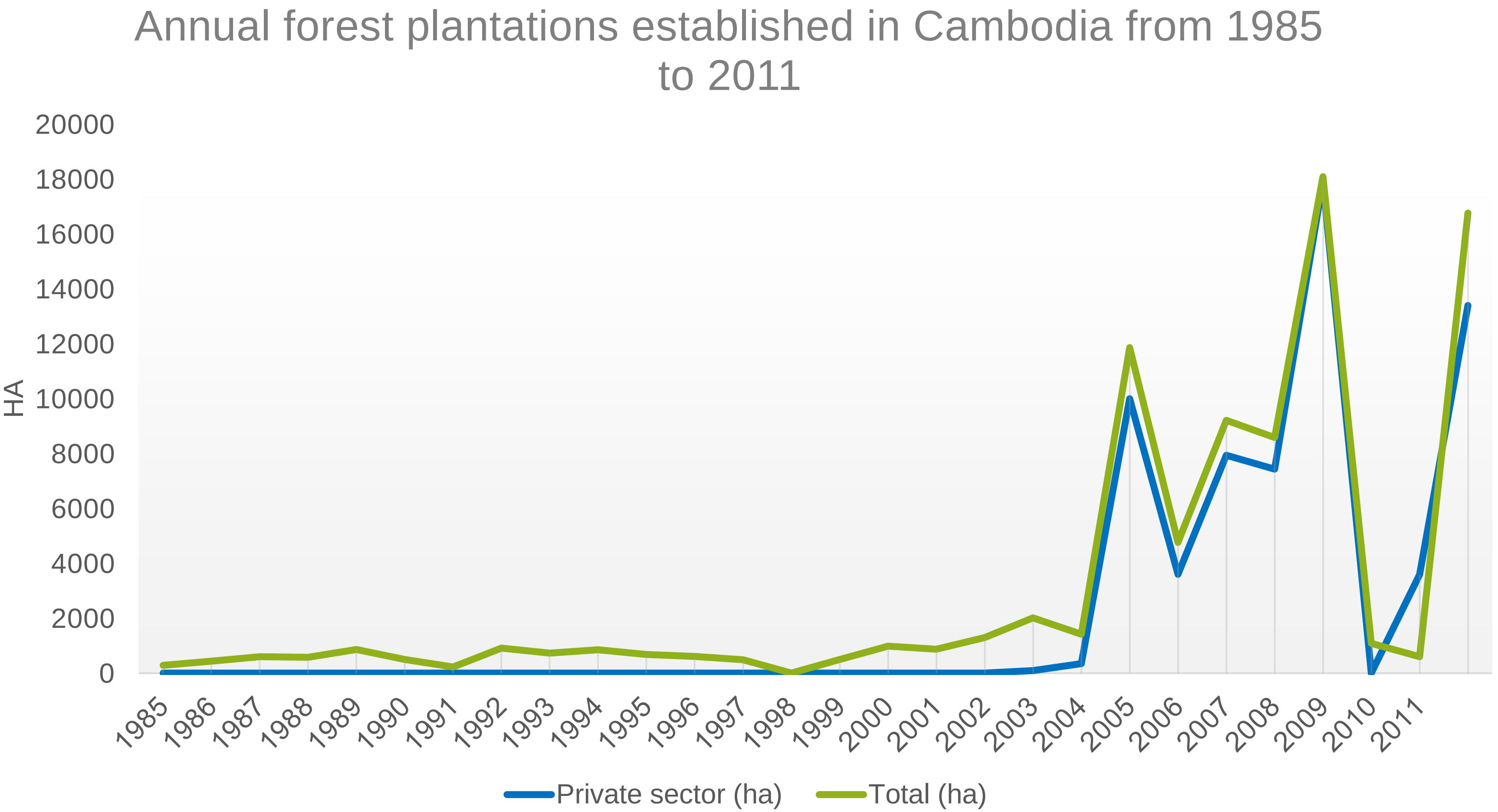


Concessions for Mining in Cambodia
N
Otdar Meanchey
Banteay Meanchey
Siem Reap
Preah Vihear
Stung Treng
Ratanak Kiri
Battambang
Pailin
Kampong Thom
Kratie
Mondul Kiri
Pursat
Kampong Chhnang
Kampong Cham
Koh Kong
Kampong Speu
Phnom Penh
Kandal
Prey Veng
Svay Rieng
Takeo
Preah Sihanouk
Kampot
Kep
0 50 100 200
Kilometers
OpenDevCam.net
Map Data Sources :
- Topographical Map 1:100,000
- Base Map 2011
Mining Data Sources :
- MIME
- Companies Website
- Other Contract
Paper size : A4 Land Scape
Projection UTM
Datum WGS 1984
Zone 48N
Scale 1 : 2,700,000
Legend
Data Classification
Secondary Source Data (117)
Provinces
Updated : 01 July 2014

6. Plantation development.



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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.