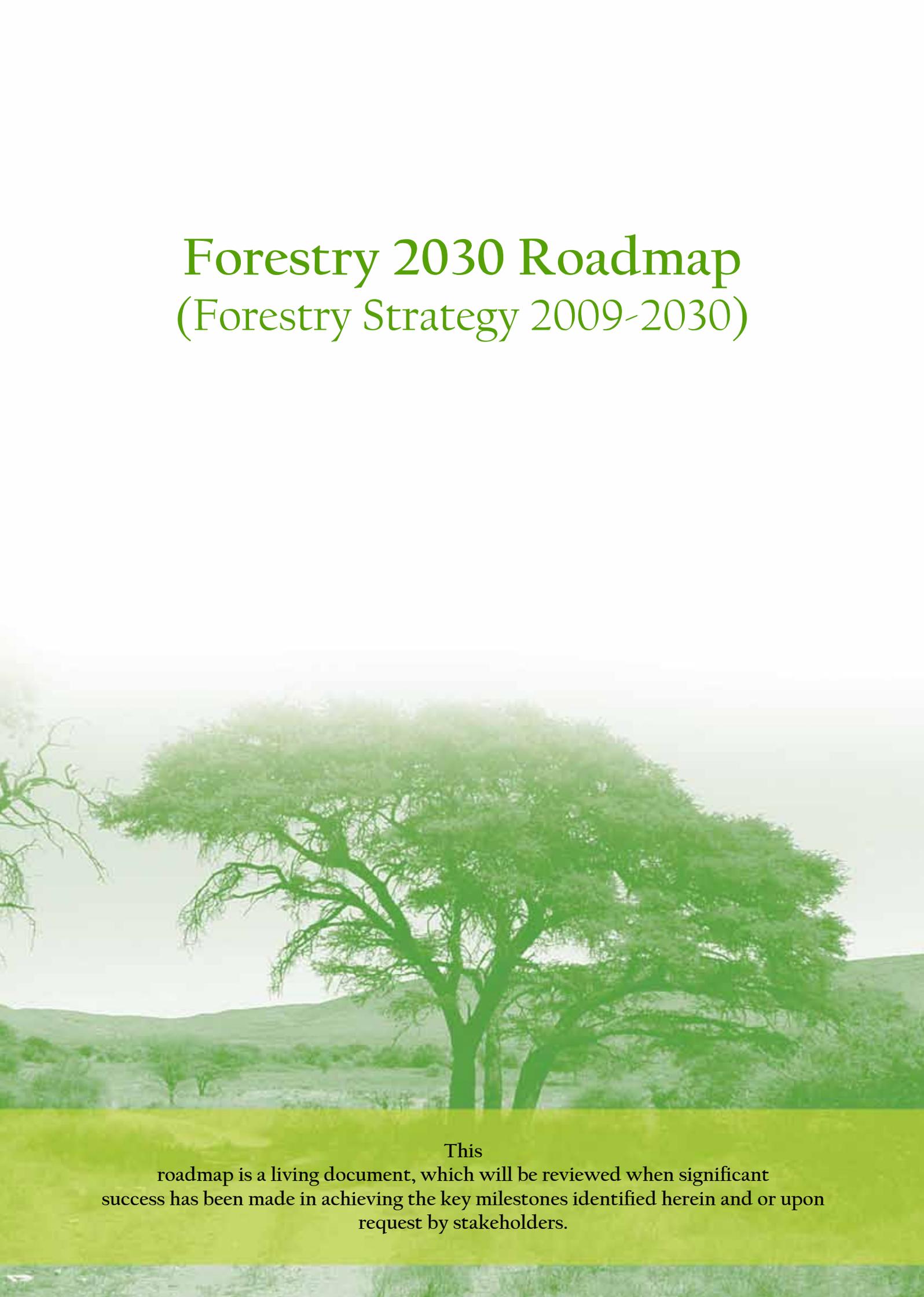


Forestry 2030 Roadmap (Forestry Strategy 2009-2030)



This
roadmap is a living document, which will be reviewed when significant
success has been made in achieving the key milestones identified herein and or upon
request by stakeholders.

PREFACE

The Department of Agriculture, Forestry and Fisheries is the custodian of South Africa's forestry resources. The goal of the Department is to ensure that the forest resources remains fit for recognised uses and that the viability of ecosystems is maintained and protected. This is achieved through the involvement of role players from several tiers of government, from the private sector and from civil society.

The sector has made strides in many respects, notably the Forest Stewardship Council (FSC) certification of three Southern Cape natural forest estates which was granted in 2002, the signing of the Forest Sector Transformation Charter in 2008 which brings about opportunities for growth in the sector and a shift in resource distribution and provision of oversight for management of forests by government; the inclusion of forestry as key sector in the Provincial Growth and Development Strategy for Limpopo and Eastern Cape; development of National Forestry Type Classification System; Protected Tree and Champion Tree lists; urban greening including the Million Trees Programme and a National Fire Danger Rating System.

However, despite the above mentioned achievements, the sector has experienced a number of challenges which hindered the sector from realising its potential contribution to job and wealth creation as well as conservation of biological diversity. The formulation of a document with a long-term policy and strategy for the development of the South African Forestry imposes a primary objective. The roadmap should reflect all contemporary trends of the world forestry. At the same time, it should give ways or methods for solution of the numerous challenges in the South African forestry in correlation with the demands of the sector, as well as with its significance for the sustainable development. In response to the need, the Department of Agriculture, Forestry and Fisheries has development forestry roadmap. The process is based on world-recognized principles, inputs from local and international experts as well as all relevant stakeholder groups and society as a whole. It sets the stage for all major decisions concerning the forest sector in South Africa for the next 20 years.

The process that was followed included the wide variety of organisations and individuals in the development of this roadmap ensured the acceptance and the use of this roadmap by all significant role players, as the Forestry 2030 Roadmap.

The Department recognises that this roadmap is not static and will therefore update and modify it on a regular basis, as determined by ongoing research and review of local and international information on the effects sustainable management and use of these resources. The process of developing Forestry 2030 Roadmap, and the involvement of key role players, is a continuing one.

Finally, I wish to express my sincere appreciation to all those who have been involved in the development of this roadmap. I also look forward to their continued involvement in maintaining one of the corner-stones of the sustainable forestry management in South Africa.

MS T. JOEMAT-PETTERSSON, MP

DATE

MINISTER OF AGRICULTURE, FORESTRY AND FISHERIES

TABLE OF CONTENTS

PREFACE	i
LIST OF ACRONYMS AND ABBREVIATIONS.....	iv
EXECUTIVE SUMMARY	1
PART ONE: THE PRESENT FORESTRY SECTOR.....	2
1. INTRODUCTION	2
2. ENVIRONMENTAL, SOCIAL AND ECONOMIC CONTEXT	3
2.1 FOREST RESOURCE BASE AND EXTENT OF FORESTRY IN THE COUNTRY	3
2.1.1 WOODLANDS	3
2.1.2 NATURAL FORESTS	4
2.1.3. COMMERCIAL PLANTATIONS.....	4
2.2 FORESTRY'S CONTRIBUTION TO SUSTAINABLE DEVELOPMENT	6
2.2.1 ENVIRONMENTAL SUSTAINABILITY	6
2.2.2 SOCIAL SUSTAINABILITY.....	7
2.2.2.1 Supply of basic needs.....	7
2.2.2.2 Saving of cash resources.....	7
2.2.2.3 Safety-net function of forest goods	7
2.2.2.4 Medicinal plants.....	8
2.2.2.5 Safeguarding subsistence use.....	8
2.2.3 ECONOMIC SUSTAINABILITY	8
2.2.3.1 Plantation forestry.....	9
2.2.3.2 Sawmilling	9
2.2.3.3 Manufactured timber.....	10
2.2.3.4 Pole production.....	10
2.2.3.5 Charcoal.....	10
2.2.3.6 Honey.....	10
3. LEGISLATIVE AND POLICY FRAMEWORK	10
3.1 THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1996	10
3.2 WHITE PAPER ON SUSTAINABLE FOREST DEVELOPMENT IN SOUTH AFRICA	11
3.3 NATIONAL FORESTS ACT, 1998 (ACT NO 84 OF 1998).....	11
3.4 NATIONAL VELD AND FOREST FIRE ACT, 1998 (ACT NO 101 OF 1998).....	11
3.4.1 NATIONAL VELD AND FOREST	11
3.5 OTHER LEGISLATION IMPACTING THE FORESTRY SECTOR.....	12
3.5.1 NATIONAL WATER ACT, 1998 (ACT NO 36 OF 1998)	12
3.5.2 ENVIRONMENTAL LEGISLATION	12
3.5.3 AGRICULTURAL LEGISLATION	12
3.5.4 LAND LEGISLATION	13
3.5.5 LABOUR LEGISLATION.....	13
3.6 FOREST SECTOR BBBEE CHARTER	13
3.7 ASGI-SA AND THE NATIONAL INDUSTRIAL POLICY FRAMEWORK.....	14
3.8 INTERNATIONAL POLICY FRAMEWORK AND CO-OPERATION	14
PART TWO: FORESTRY SECTOR CHALLENGES	15
4. KEY CONSTRAINTS TO FORESTRY GROWTH	15
4.1 CHALLENGE 1: LAND REFORM	15
4.1.1 POST SETTLEMENT SUPPORT TO COMMUNITIES/ COMMUNITY READINESS	15
4.1.2 TRANSFER TO COMMUNITIES AND COMMERCIALISATION OF STATE ASSETS ..	16

4.2	CHALLENGE 2: RAISING THE PROFILE OF THE FORESTRY SECTOR.....	16
4.3	CHALLENGE 3: TIMBER SHORTAGE IN THE COUNTRY.....	16
4.4	CHALLENGE 4: ACCESS TO FUNDING.....	17
4.5	CHALLENGE 5: SKILLS SHORTAGE IN FORESTRY SECTOR.....	17
4.6	CHALLENGE 6: RESEARCH DEVELOPMENT AND INNOVATION	17
4.7	CHALLENGE 7: CLIMATE CHANGE	18
4.8	CHALLENGE 8: FORESTRY PROTECTION	18
4.9	CHALLENGE 9: FORESTRY AND REGULATORY ENVIRONMENT	18
4.10	CHALLENGE 10: MONITORING AND EVALUATION.....	19
PART THREE : THE FUTURE FORESTRY SECTOR.....		20
5.	NATIONAL FORESTRY ROADMAP	20
5.1	PROBLEM STATEMENT.....	20
5.2	VISION	20
5.3	MISSION	20
5.4	PRINCIPLES	20
5.5	POLICY CONTEXT	21
5.6	STRATEGIC OBJECTIVES	21
5.7	FORESTRY ROAD MAP	22
6.	RESOURCING THE ROADMAP	25
7.	MONITORING, REPORTING AND REVIEW	25
REFERENCES		26
ANNEXURE A: DISTRIBUTION OF FORESTRY RESOURCES IN SOUTH AFRICA.....		27
ANNEXURE B: ANNUAL PLAN OF IMPLEMENTATION		32
TABLES		
Table 1: Plantation area by species/ownership.....		5
Table 2: Plantation area by province/ownership.....		5
Table 3: Economic opportunities based on forest resources		8
Table 4: Long Term Demand and Supply Scenario (Source: Forestry South Africa, 2007)		17
FIGURES		
Figure 1: Forest Stewardship Certified Forests by Ownership		4
Figure 2: Land Use comparisons in South Africa in different years.		19

LIST OF ACRONYMS AND ABBREVIATIONS

ASGI-SA	Accelerated Shared Growth Initiative of South Africa
ARC	Agricultural Research Council
BBBEE	Broad Based Black Economic Empowerment
CAs	Conservation Authorities
C & I	Criteria, Indicators and Measures
CDM	Clean Development Mechanism
CSIR	Centre for Scientific and Industrial Research
DAFF	Department of Agriculture, Forestry and Fisheries
DEAT	Department of Environmental Affairs and Tourism
DFA	Department of Foreign Affairs
DIRC	Department of International Relations and Cooperation
DIY	Do It Yourself
DLA	Department of Land Affairs
DoA	Department of Agriculture
DPE	Department of Public Enterprise
DRDLR	Department of Rural Development and Land Reform
DST	Department of Science and Technology
DTI	Department of Trade and Industry
DWAF	Department of Water Affairs and Forestry
DWEA	Department of Water and Environmental Affairs
FABI	Forestry and Agriculture Biotechnology Institute
FIETA	Forest Industries Education and Training Authority
FMU	Forest Management Unit
FSC	Forest Stewardship Council
GDP	Gross Domestic Product
Insts	Institutions
KZN	KwaZulu-Natal
NEPAD	New Partnership for Africa's Development
NIPF	National Industrial Policy Framework
NFA	National Forests Act
PROV	Provincial Government
R & D	Research and Development
SADC	Southern African Development Community
SFRA	Stream Flow Reduction Activity
SME	Small and Medium Enterprise
UNFCCC	United Nations Framework Convention on Climate Change

EXECUTIVE SUMMARY

The Department of Agriculture, Forestry and Fisheries, as a custodian of forestry resources in South Africa, is responsible for the promotion of the sustainable management of the country's forest resources for the benefit of the nation. The National Forests Act, 1998 (Act No 84 of 1998) promotes sustainable forest management based on the principles of sustainable development and therefore ensures the integration of ecological, social and economic values, in consultation with local communities and other stakeholders.

The forestry resource base, i.e. natural (indigenous) forests, commercial plantations and woodlands, is spread over some of the poorest areas in South Africa and therefore plays a significant role in terms of poverty eradication, through job creation, supply of basic needs and acting as a safety-net.

The commercial forestry sector is globally competitive, but it is not adequately transformed and operates within a highly regulated environment which is currently affecting its ability to reach its full potential.

The conclusion and signing of the Forest Sector Transformation Charter and the recognition of forestry as one of the potential growth sectors in South Africa by the Department of Trade and Industry have created a need for strong partnerships between Government and other stakeholders, including industry with a view to sustainably grow and transform the forestry sector.

In order to benefit from these opportunities, the Department together with its stakeholders developed a strategy document that maps the path the sector will embark on over the next 20 years to realise its potential to contribute to government objectives.

The document reflects on the current policy and legislative framework that provide the mandate for the The Department of Agriculture, Forestry and Fisheries in relation to Forestry; highlight key challenges that impede the growth and transformation of the sector; and present strategic interventions to be taken by the Department and the industry to realise the sectors potential to contribute to sustainable development.

The Roadmap reflects the new vision for the forestry sector, principles and eight strategic objectives as well as targets and actions to achieve these objectives. In summary, the strategic objectives cover the expansion of the forest estate; improvement of quality of life through forestry; conservation of forest biological diversity; improvement of skills, awareness raising and information sharing; enhanced and streamlined regulatory environment; securing timber supply; institutional and financial arrangements; establishment of a knowledge-based forest enterprise; and international relations.



PART ONE: THE PRESENT FORESTRY SECTOR

1. INTRODUCTION

Following the democratic dispensation in 1994, South Africa underwent a rigorous law reform process in various sectors. This law reform was informed by a series of White Papers and similar policies. Within the forestry sector, in 1996, a White Paper on Sustainable Forest Development in South Africa was adopted. That policy document set various goals that had to be achieved within a five year period.

Developments within the forestry sector have necessitated a stocktaking exercise with a view to review the relevance of policies which were adopted in that era. Following the adoption of the White Paper, a series of legislative and other policy documents to effect the provisions of the White Paper have been developed and implemented. The above mentioned developments include the development of the forest legislation namely National Forests Act, 1998 (Act No 84 of 1998); National Veld and Forest Fire Act, 1998 (Act No 101 of 1998); Forest Laws Amendment Act, 2005 (Act No 35 of 2005) and National Forest and Fire Amendment Act, 2001 (Act No 12 of 2001). Furthermore, the adoption of growth related policies by government, i.e. the Accelerated and Shared Growth Initiative - South Africa (ASGI-SA) and the National Industrial Policy Framework, identified forestry as a sector with growth potential and Industrial Policy Action Plans were developed for the forestry, pulp and paper and furniture sector.

The National Climate Change Response Strategy for South Africa (September 2007) developed by the Department of Environmental Affairs and Tourism, cites South African forests as sensitive to climatic change. The deliberations within the United Nations Framework Convention on Climate Change (UNFCCC) present opportunities for sustainable forest management, particularly in respect of mitigation effects. The strategy also advocates facilitation of establishment and extension of forest schemes as a contribution to the implementation of a proposed national greenhouse gas mitigation plan that furthers the process of sustainable development in South Africa in light of the Cleaner Development Mechanism, technology transfer, donor funding and capacity building opportunities. The impact of climate change on the forestry sector also requires adaptation to avoid some predictable risks, especially relating to risks of increase in frequency and intensity of fires, droughts, pest and disease and geographic shifts in optimal growing conditions.

The sector has made strides in many respects, notably the Forest Stewardship Council (FSC) certification of three Southern Cape natural forest estates which was granted in 2002; the signing of the Forest Sector Transformation Charter in 2008 which brings about opportunities for growth in the sector and a shift in resource distribution and provision of oversight for management of forests by government; the inclusion of forestry as a key sector in the Provincial Growth and Development Strategy for Limpopo and the Eastern Cape; disposal or transfer of State Forests; development of afforestation strategy for Eastern Cape; development of National Forest Type Classification System, Protected Tree and Champion Tree lists; urban greening including the Million Trees programme; establishment of the National Forest Advisory Council; protected area planning for natural forests; and the development of a National Fire Danger Rating System.

However, despite the above mentioned achievements, the sector has experienced a number of challenges which hindered the sector from realising its potential contribution to job and wealth creation as well as conservation of biological diversity. The challenges range from inadequate supply of raw materials; biased equity distribution in the value chain; non-optimal contribution to poverty alleviation and economic development; and slow afforestation uptake to cumbersome licensing processes within government. These challenges threaten long term sustainability of the sector and need to be addressed with a sense of urgency.

As forestry continues to be one of the important sectors in South Africa, contributing both to the economy of the country, employment and improvement of livelihoods, the Department needs to examine its dual mandate of conservation and promotion of forestry as one of the crucial industries in South Africa, particularly in the light of the fact that the Draft National Protected Areas Strategy developed by the Department of Environmental Affairs and Tourism identifies the forest biome as one of the significantly conserved biomes, except for specific forest types.

This will assist in the equitable distribution of financial and human resources within the programmes, while ensuring that natural forests are conserved, protected and managed efficiently.

It is against this backdrop that the Department in consultation with its key stakeholders has developed a strategy document which will serve as a roadmap for the sustainable development and management of all forestry resources in a manner that will benefit all South African while maintaining the integrity and viability of natural forests as important ecosystems deserving of protection for future generations.

2. ENVIRONMENTAL, SOCIAL AND ECONOMIC CONTEXT

2.1 FOREST RESOURCE BASE AND EXTENT OF FORESTRY IN THE COUNTRY

The forest resources of South Africa consist of three main types, namely: woodlands, natural forests and commercial plantations (Annexure A).

2.1.1 WOODLANDS

Woodlands cover the bulk of the forests land in the country covering approximately 29-42 million hectares, depending on the classification system used. This is about one third of South Africa's total land area and about 5.7 million hectares of woodlands are in protected areas. The main land uses in woodland areas are livestock farming and conservation by means of national parks. The most important product harvested from woodlands is firewood. Exploitation of woodland timber on a commercial scale is confined to the craft industry for carving and for furniture products. A variety of plants is traditionally harvested for medicinal, food and domestic purposes.

The importance of woodlands as a resource, especially in relation to poverty, is illustrated by the fact that:

- » 27 million people rely on medicinal plants for health care; 65% of the plants used for this purpose are forest or woodland species.
- » Between 9 and 12 million people use fuelwood, wild fruits and wooden utensils obtained from forests and woodlands.
- » Each year, the average rural household uses 5.3 tonnes of firewood, 104 kg of wild fruits, 185 large poles for fences and construction, and 58 kg of wild spinaches – most of which is sourced from woodlands.
- » The direct-use value of woodland resources consumed each year is at least R8 billion.
- » Access to woodland resources contributes between 20% and 25% of total livelihood accruals.
- » If these goods were not available, the benefits they provide would have to be provided by the State in order to stem the tide of rural poverty.
- » Approximately 800 000 people operate in the craft industry, which is heavily reliant on woodland resources.
- » Up to 100 000 households in South Africa engage in small-scale trade in forest products from woodlands.

Woodlands are increasingly under threat, and it is vital that appropriate measures be implemented to ensure sustainable woodland management.

2.1.2 NATURAL FORESTS

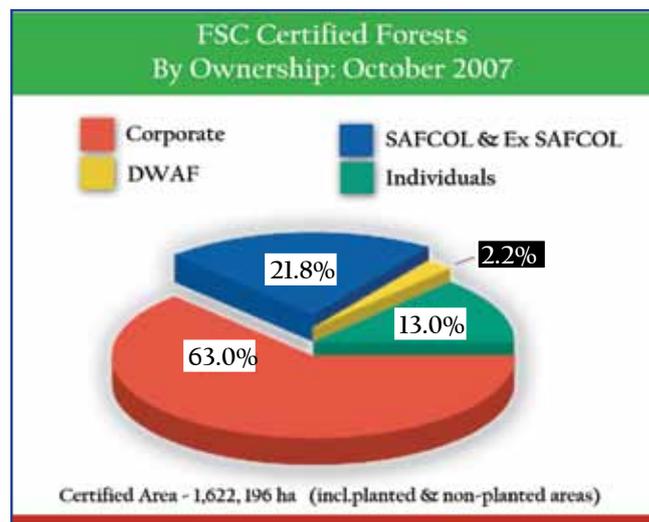
Natural forests cover a relatively smaller area of 492 700 ha. This is less than 0.4% of South Africa land area, but these forests have the highest biodiversity per unit area (0.418 species/ha). Almost three quarters of these are conserved either as declared State forests or within formal protected areas.

South African natural forests can be classified into seven forest groups, further subdivided into 20 forest types and 4 azonal forest types. The Eastern Cape has the largest share (46%); KwaZulu-Natal has 29%; Western Cape 13%; Mpumalanga 7% and Limpopo 5%. However, the Eastern Cape has only 4.75% of its area under protected status.

2.1.3 COMMERCIAL PLANTATIONS

Commercial plantations cover approximately 1.26 million ha of the country and over 80% of them occur in the three provinces of Mpumalanga, KwaZulu-Natal and the Eastern Cape. Approximately 68% of the area covered by plantation estates in South Africa is planted with exotic tree species. The balance of these estates contains natural vegetation, including natural forests that have to be protected. The applicable mechanisms for the protection of such natural forests are Forest Management Unit (FMU) forest protection plans. All commercial plantations in South Africa which have achieved FSC certification (82% of all plantation estates) do have FMU plans. This means that currently sustainable plantation management is practiced on at least 82% of the total area. This is the highest percentage of certified plantations in the world. The figure below shows the Forest Stewardship Council certified plantations by ownership (Figure 1):

Figure 1: Forest Stewardship Certified Forests by Ownership



FSC certified forests by ownership: October 2007

Source: Department of Water Affairs and Forestry, 2008

Most of the State's larger plantations have been leased and the remaining smaller plantations (about 61 183.4 ha) are still managed by government.

Although forests constitute a relatively small percentage of the total land area of South Africa, the forestry sector contributes R22 billion per annum to the Gross Domestic Product. The commercial plantations produce more than 22 million cubic meters of round wood worth an estimated R5.1 billion annually. The sector is also a net exporter of goods and the exports of forest products amount to R12.2 billion per annum, whereas imports total R9.8 billion.

The constitution, composition and distribution of these commercial plantations are shown in the tables 1 and 2

There is a rapid development of black ownership and management in the form of out grower timber schemes. Out grower timber schemes are community-based plantations, normally in the form of small woodlots occurring in patches operated by private companies such as Mondi, Sappi and the SA Wattle Growers Union. Most of these are sustainably managed as the Chain of Custody principle of the Forest Stewardship Council (FSC) ensures that the large buyers of timber from small growers are obliged to buy from sustainably managed forest operations.

TABLE 1: PLANTATION AREA BY SPECIES/OWNERSHIP

Species	Ownership 2006/07			Percent Privately Owned	Percent Publicly Owned
	Private	Public	Total		
	Hectares				
Softwood	513 587	163 492	677 079	75.9%	24.1%
<i>E. grandis</i>	234 920	34 274	269 193	87.3%	12.7%
Other Gum	197 391	11 121	208 511	94.7%	5.3%
Wattle	98 912	4 106	103 018	96.0%	4.0%
Other	6 414	1 979	8 393	76.4%	23.6%
Total	1 051 223	214 971	1 266 194	83,0%	17.0%

TABLE 2: PLANTATION AREA BY PROVINCE/OWNERSHIP

Province	Ownership 2006/07			Percent Privately Owned	Percent Publicly Owned
	Private	Public	Total		
	Hectares				
Limpopo	25 403	22 693	48 096	52.8%	47.2%
Mpumalanga	386 533	128 297	514 830	75.1%	24.9%
NW Province	0	126	101	0,0%	100.0%
Gauteng	0	0	0	0,0%	0,0%
Free State	0	0	0	0,0%	0,0%
KZN	454 721	32 245	486 966	93.4%	6.6%
E Cape	124 030	31 049	155 079	80.0%	20.0%
N Cape	0	0	0	0,0%	0,0%
W Cape	60 535	562	61 097	99.1%	0.9%
Total R.S.A	1 051 222	214 972	1 266 194	83,0%	17,0%

Source: Department of Water Affairs and Forestry, 2008

2.2 FORESTRY'S CONTRIBUTION TO SUSTAINABLE DEVELOPMENT

Sustainable development ties together concern for the carrying capacity of natural systems with the social challenges facing humanity. As early as the 1970s “sustainability” was employed to describe an economy “in equilibrium with basic ecological support systems”. The field of sustainable development can be conceptually broken into three constituent parts, i.e. environmental sustainability, economic sustainability and sociopolitical sustainability. Agenda 21 emphasises that broad public participation in decision making is a fundamental prerequisite for achieving sustainable development. It means resolving the conflict between the various competing goals, and involves the simultaneous pursuit of economic prosperity, environmental quality and social equity famously known as three dimensions (triple bottom line). It is a continually evolving process; the ‘journey’ (the process of achieving sustainability) is of course vitally important, but only as a means of getting to the destination (the desired future state).

Sustainable Forest Management is the management of forests according to the principles of sustainable development. The National Forests Act, 1998 (Act No 84 of 1998) promotes sustainable forest management and therefore ensures the integration of ecological, social and economic values, in consultation with local communities and other stakeholders.

2.2.1 ENVIRONMENTAL SUSTAINABILITY

South Africa is rated third among the countries in the world richest in biological diversity (mega diverse countries). A substantial portion of this biodiversity is represented by species occurring in forests and woodlands (including thickets) and the diversity of plant communities within these biomes. The Forest biome has the greatest plant species diversity per unit area of all biomes in the country and therefore plays a substantial role in contributing towards national conservation targets. The conservation planning process that aims at conserving key natural forests, thickets and woodlands is still in its early stages and will have to be advanced during the next five years through national scale mapping of the woodlands (including thickets) and through generating primary data on their biological diversity that would support quantitative decision models for the determination of conservation priorities and targets.

This served as input into the National Protected Areas Expansion Strategy. Conservation of natural biodiversity is a competency that is shared among different spheres of Government and thus requires co-operation and co-ordination among different Government Departments.

There is limited information on the ecosystem services value attached to South Africa's forests and where some estimates have been made, they have not apportioned what fraction of the benefits is captured exclusively or primarily by rural communities and what proportion by society at large. However, such services are of importance to the rural poor, in part as the related costs are borne disproportionately by such people. Society at large can however benefit from the role forests play in climate change. Climate change is emerging as perhaps the greatest environmental challenge of the twenty-first century and forests are important in terms of their potential to absorb carbon emissions. Forests are however also sensitive to climate change and therefore the forestry sector will focus on maximising mitigation potential, although the forest resource base is small, and ensure adaptation options are developed to enable the sector to respond to climate change.

Commercial forestry and water yield is a significant issue in a dry country like South Africa. Commercial forest plantations cover 1.1 percent of the total area of South Africa, but reduce the total mean annual stream flow by about 2.7 percent. Pulp and paper mills are the largest users of water (± 250 million m^3 per annum) among the forest industry processing plants and also produce the largest volume of waste. Generally, plantation forestry tends to have positive effects on water quality by reducing surface run-off, evaporation and loss of topsoil, when well managed. However, poor management of certain forest operations (e.g. road construction, timber extraction and site preparation) can result in large quantities of suspended sediment being discharged into river systems. Plantation fires, although infrequent, can also result in the release of sediments to streams raising sediment yields by up to 20 times.

2.2.2 SOCIAL SUSTAINABILITY

As in other countries, the very poorest have to rely on the collection of a wide range of items growing in the wild simply in order to survive. These forest goods provide three types of benefit, namely: (i) the supply of basic needs, (ii) a saving of cash resources, and (iii) a buffer or safety-net during times of misfortune. The draft key issue paper on forestry and poverty in South Africa, 2005 summarises the above mentioned benefits as follows:

2.2.2.1 Supply of basic needs

The supply of basic needs is a function that forest resources play for a large number of poor people. Firewood, building poles, medicinal plants, and edible fruits are all critical to the livelihood of the rural poor. Over 80 percent of rural households use fuel wood as their primary source of energy. Nearly all of this, some 13 million m³ annually, is taken from savannas, indigenous forests and plantation off-cuts. This fuel wood use has a gross national value of approximately R3 billion annually, or just under R2 000 per using household per year. The unsustainable use of fuel wood resources is therefore a threat not only to the resource base, but also to rural livelihoods. With a predicted 1.5 million rural households remaining without electrical supply for the next twenty years a continuing reliance on fuel wood can be expected.

Primary health care for the poor is also heavily dependent on forest resources. The 28 million people who use traditional plant medicine in South Africa depend on their continuing supply. Over 65 percent of the plant material in urban markets is forest or savanna species and the most favoured species come from forests. Approximately one-third of medicinal plant material is tree bark. Forests also make an important contribution to the nutritional well-being of many poor people, with edible fruit and other forest foods being important sources of nutrition at various times of the year. User households extract considerable volumes of these forest resources on an annual basis. There are also clear indications that it is the poorer and more isolated communities, as well as households that are less well off or headed by women, which are more dependent on these resources.

2.2.2.2 Saving of cash resources

Forest resources play an important role in enabling the rural poor to save scarce cash resources, which may then be used for other household needs. Being able to collect such resources to meet daily needs for energy, shelter, medicine and food allows scarce cash resources to be used to secure other household needs, as well as helping to accumulate the necessary asset base for a more secure livelihood. This includes the education of children, investment in agricultural tools, and capital for income generation activities. It is estimated that such cash saving amounts to several thousands of Rand per household per year. The magnitude of this saving is greater to poorer households than wealthier households simply by virtue of the reduced total income sources and sizes for poor households. This cash saving also has benefits at the national level, as government would incur some of these costs were it necessary to provide these services in rural areas.

2.2.2.3 Safety-net function of forest goods

The safety-net function of forest goods refers to the role they play in assisting households cope in times of adversity. Events such as death, disability or the retrenchment of a member of the household, as well as natural disasters, the need to pay annual school fees, or unanticipated and large increases in the cost of staple foods and goods, can stretch families beyond their normal capacity to cope. During such times many rural households turn to forest resources to tide them over what they perceive is a temporary setback. Because the safety-net function of forest resources is temporally variable, there is little information regarding the prevalence of this activity throughout rural communities. But there is no doubt it is widespread. Many small-scale vendors of forest resources recount that the initial impetus for them taking to selling was some household hardship, especially for those with limited or no education.

2.2.2.4 Medicinal plants

Medicinal plants will continue to underpin the health care system of South Africa for a number of years. The huge scale of consumption dictates that this is a sub-sector that cannot be ignored, despite poor prospects for growth. A reduced reliance on the dwindling stocks of wild plants and the development of reliable, commercially cultivated stocks will help to secure the supply of raw materials. However, the prospects for the harvesters of wild plants appear bleak unless non-traditional sources of supply (e.g. protected areas and private lands) can be accessed.

2.2.2.5 Safeguarding subsistence use

By definition, the subsistence use of forest products does not offer any prospect for the rural poor to escape poverty. However, until such time that alternative ways out of poverty can be found these products will continue to serve an important safety net function for many poor people, thus contributing to the objective of poverty alleviation. The greatest challenge facing the country in this regard is balancing the need for poverty alleviation with forest conservation so as to ensure a sustainable supply of forest products for subsistence use. Without the continuing supply of firewood, construction poles, medicinal plants and forest foods the existing hardships borne by the poor will undoubtedly increase. Unfortunately, much of this use remains hidden from the national economy, as the necessary statistics to demonstrate their importance in the rural economy are not collected in any systematic way.

2.2.3 ECONOMIC SUSTAINABILITY

The forest resources of South Africa represent a considerable natural asset for economic growth, based upon both enterprise and employment opportunities. Although forests constitute a relatively small percentage of the total land area of South Africa, the forestry sector contributes R 22 billion per annum to the Gross Domestic Product. The commercial plantations produce more than 22 million cubic meters of roundwood worth an estimated R 5.1 billion annually.

The sector is also a net exporter of goods and the exports of forest products amount to R 12.2 billion per annum whereas imports total R 9.8 billion. At the same time, significant constraints on the poor benefiting from forestry have been noted. If these were diminished there is the prospect that significant gains in national poverty reduction could be achieved. It is important to recognise that these forest resources are not uniform and therefore there is considerable differentiation within the sector. To explore further the potential opportunities for the poor a closer look is required. Table 3 below summarizes some of the more important facts and figures.

Table 3: Economic opportunities based on forest (Adapted on key issue paper on Forestry & Poverty in South Africa, 2005)

Sub-sector	Economic context	Growth prospects	Regions
Commercial plantations	170 000 direct jobs in forest & forest product industry Large number of new jobs could be created	Current supply just meeting demand GDP growth will increase demand	KZN, EC, WC, Limpopo, Mpumalanga
Medicinal plants	28 million consumers nationally 200 000 traditional health practitioners 16 000 harvesters gathering wild plants in KZN	Declining due to supply restrictions But vast national demand exists	All

Sub-sector	Economic context	Growth prospects	Regions
Large and small-scale Sawmilling	30 000 employees in existing sawmills Large sawmills – employment Small sawmills – ownership for new entrants	Limited growth in demand projected DWAF remaining plantations represent a significant resource	KZN, EC, WC, Limpopo, Mpumalanga
Manufactured timber products	Established sector with some niche opportunities 900 furniture manufacturers in SA No estimate of employees available	Small growth prospects in furniture components, DIY products, packaging products and timber grading	All
Pole production	Rural employment and ownership opportunities 150 pole treatment plants operating in SA	Good growth prospects, based on existing DWAF Cat. B & C plantations	KZN, EC, WC, Limpopo, Mpumalanga
Charcoal	6 000 employees in charcoal industry	Industrial and retail demand strong Joint venture projects under development	All
Honey production	2 400 bee farmers	Good – current national demand exceeds supply	KZN, EC, WC, Limpopo, Mpumalanga

2.2.3.1 Plantation forestry

Plantation forestry offers considerable promise for growth. Recent projections of future demand for round wood have indicated a considerable expansion of the existing plantation estate is required if South Africa is to remain self-sufficient in round wood, and make a significant contribution to foreign exchange earnings. The Department developed the Forest Sector Transformation and Growth Charter as such a tool.

There are opportunities for new afforestation over an area of up to 100 000 hectares, mostly in the provinces of the Eastern Cape. Such an expansion in the plantation area would provide considerable economic benefits, including the creation of many new jobs. This represents a possible opportunity for rural employment and economic growth in the more disadvantaged parts of South Africa, such as the Eastern Cape. The South African forestry industry already displays a strong comparative advantage in plantation management and has considerable experience of partnerships between large commercial companies and small-scale tree growers.

2.2.3.2 Sawmilling

Sawmilling provides scope for black economic empowerment and participation by the poor. In the large-scale sawmilling sector opportunities exist to increase the participation of small contractors in the transport and distribution of sawmill products. In the small-scale sawmilling industry it is estimated that previously disadvantaged people own more than 80 percent of all sawmill operations. Most of the employees, including a large percentage of women, are from poor rural communities. However, the future development of these small-scale mills will depend to a large degree on securing log supplies. In this context, the on-going restructuring process for DAFF Category B and C plantations represents an opportunity to meet this need.

2.2.3.3 Manufactured timber

Manufactured timber products offer modest prospects for growth, particularly in filling niche markets. Those product categories that are less volume-sensitive offer the most potential. There are opportunities for the supply of components (e.g. turnings), laminated boards and pre-specified board sizes to existing furniture manufacturers. A similar opportunity exists for the supply of DIY products to wholesale and retail outlets. All of these products can be manufactured from industrial timber that is available from large sawmills as waste. Opportunities also exist in all forestry regions to supply agricultural boxes, crates and pallets to tomato, citrus and vegetable producers. Buyers include individual farmers, packaging companies and agricultural co-operatives.

2.2.3.4 Pole production

Pole production is a small market, but has good growth prospects. The transfer of DAF Category B and C plantations in Limpopo and Kwazulu-Natal offer immediate opportunities for SMMEs and rural communities to establish small enterprises producing treated timber poles. Almost all these plantations are linked to existing DWAF pole treatment plants, overcoming the hurdle of access to downstream processing facilities.

2.2.3.5 Charcoal

Charcoal production is seen as an ideal Small to Medium Enterprise activity. Small-scale production is economical; little capital is required; most activities are decentralised; being in rural areas in close proximity to major timber resources. Some large companies have already shown interest in forming joint ventures with small-scale producers to secure lump charcoal supplies on a regular basis. They are often prepared to provide funding, training and the initial investment required for small-scale production plants, as well as providing medium to longer term supply contracts. Although long-term sources of supply are very uncertain, the DWAF Category B and C plantations in the Eastern Cape and Limpopo contain extensive areas of hardwood suitable for charcoal manufacture.

2.2.3.6 Honey

Honey production represents a very small segment of the economy, but one that has good prospects for growth and in which the rural poor can engage. The foremost bee-keeping development agency in South Africa is the Bee-keeping for Poverty Relief Programme of the Agricultural Research Council (ARC). This programme supports participants who develop their enterprises at their own pace. The rapid expansion of the programme, in which participants themselves solve local problems such as theft, indicates the efficacy of this approach. Modest expansion within gum plantations is possible.

3. LEGISLATIVE AND POLICY FRAMEWORK

3.1 THE CONSTITUTION OF THE REPUBLIC OF SOUTH AFRICA, 1996

Section 24 of the South African Constitution stipulates that everyone has the right to

- a. An environment that is not harmful to their health or well-being; and
- b. To have the environment protected, for the benefit of present and future generations, through reasonable legislative and other measures that:
 - (i) prevent pollution and ecological degradation;
 - (ii) promote conservation; and
 - (iii) secure ecologically sustainable development and use of natural resources while promoting justifiable economic and social development.

In terms of the Constitution, forestry is a national competence. This implies that central Government, specifically The Department of Agriculture, Forestry and Fisheries, has the primary responsibility for the management of forest resources. However, it must be noted that the Constitution, 1996, also defines the administration of indigenous forests as a concurrent functional area of National and Provincial legislative competence (Schedule 4, Part A). DAFF is therefore in a process of transferring the management of its indigenous State Forests to the Department of Water and Environmental Affairs (to be administered by the South African National Parks) or relevant provincial organs of State.

3.2 WHITE PAPER ON SUSTAINABLE FOREST DEVELOPMENT IN SOUTH AFRICA

The White Paper on Sustainable Forest Development in South Africa, 1996 provided for government to deliver a wide range of support and services to ensure sustainable development of the forest sector.

The White Paper recognizes the key role of government at all levels (national, provincial and local) in achieving the vision of a sustainable and efficient forest sector and the need for coordination between the different levels of government, the private sector and civil society.

The goals of the White Paper are aligned to the National Government Medium-Term Strategic Objectives, which are as follows:

- » Speeding up delivery of basic human needs;
- » Human Resource Development;
- » Building the Economy and Creating Jobs; and
- » Building a better Africa and world.

3.3 NATIONAL FORESTS ACT, 1998 (ACT NO 84 OF 1998)

The purposes of the National Forests Act, 1998 (NFA) are to:

- » promote the sustainable management and development of forests for the benefit of all;
- » create the conditions necessary to restructure forestry in State forests;
- » provide special measures for the protection of certain forests and trees;
- » promote the sustainable use of forests for environmental, economic, educational, recreational, cultural, health and spiritual purposes;
- » promote community forestry; and
- » promote greater participation in all aspects of forestry and the forest products industry by persons disadvantaged by unfair discrimination.

3.4 NATIONAL VELD AND FOREST FIRE ACT, 1998 (ACT NO 101 OF 1998)

The purpose of the National Veld and Forest Fire Act, 1998 (NVFFA) is to prevent and combat veld, forest and mountain fires throughout the Republic. The Act provides for a variety of institutions, methods and practices for achieving the purpose, i.e. the establishment and registration of Fire Protection Associations to deal with all aspects of veldfires prevention and fire fighting; the development and maintenance of a national fire danger rating system to assist in the prevention of veldfires; the preparation and maintenance of firebreaks by landowners; and fire fighting.

The NVFFA is intended to support Integrated Fire Management (IFM), which results in the integration of a number of

activities to allow effective management of fires, both to enhance their positive benefits and to reduce negative impacts:

- » Prescribed burning;
- » Wildfire control;
- » Risk minimization;
- » Training and awareness;
- » Resource management and co-ordination; and
- » Ecosystem management.

IFM is also supported by various pieces of legislation providing the framework for cooperative governance and integration of this function:

- » Disaster Management Act, 2002 (Act No 57 of 2002)
- » Conservation of Agricultural Resources Act, 1983 (Act No 43 of 1983)
- » Municipal Systems Act, 2002 (Act No 32 of 2002)
- » Fire Brigade Services Act, 1987 (Act No of 1987)

3.5 OTHER LEGISLATION IMPACTING THE FORESTRY SECTOR

3.5.1 NATIONAL WATER ACT, 1998 (ACT NO 36 OF 1998)

Afforestation has been regulated in South Africa since 1972. This was initially done by means of the Forest Act, 1968 (Act No 72 of 1968). This act was amended by the Forest Amendment Act, 1972 (Act No 46 of 1972) to make provision for the control of afforestation by the inclusion of section 4A. This amendment came into effect on 26 May 1972. The 1968 Act was further amended and replaced a number of times. Since 1998, DAFF has issued water use licences for forestry as a Stream Flow Reduction Activity (SFRA) in terms of the National Water Act, 1998 (NWA) (Act No 36 of 1998).

A SFRA is one of eleven water uses described in section 21 of the NWA. It is described as any activity (including the cultivation of any particular crop or other vegetation) likely to reduce the availability of water in a watercourse to the Reserve, to meet international obligations, or to other water users significantly. By implication, the definition of an SFRA limits it to land-based activities affecting the water resource. Currently, the only declared SFRA is commercial afforestation, but others may be added to this list in future.

3.5.2 ENVIRONMENTAL LEGISLATION

The National Department of Environment Affairs and Tourism (DEAT) administer the National Environmental Management Act, 1998 (NEMA) (Act No 107 of 1998). The aim of NEMA is to provide for co-operative environmental governance.

The regulations in terms of NEMA list specific activities that require authorisation. Although afforestation is not specifically mentioned, basic assessments or environmental impact assessments are required depending on the area to be affected by afforestation.

3.5.3 AGRICULTURAL LEGISLATION

The Department of Agriculture (DoA) administers the requirements of the Conservation of Agricultural Resources Act, 1983 (CARA) (Act No 43 of 1983). The aim of CARA is to protect agricultural resources, i.e. soil, water, and vegetation. Some of the tree species used in commercial forestry is listed in terms of CARA and therefore areas planted with these

species must be demarcated as required in terms of the regulations and transport permits for the transport of the trees must be obtained.

In addition to the above, DoA is also responsible for regulating the use of agricultural land. This could include the transfer of agricultural land to be used for forestry, the use of high potential agricultural soil for afforestation, and the transfer of water allocated to agriculture (food production) to afforestation.

3.5.4 LAND LEGISLATION

In terms of the Interim Protection of Informal Land Rights Act, 1996 (Act No 31 of 1996), land to which people have informal right (including communally owned land) is nominally held in trust by the Minister of Land Affairs. This implies that the decision to develop communal forestry on such land would require the consent of the Minister of Land Affairs. However, in terms of the Interim Procedures released by the Department of Land Affairs (DLA) in December 1997, such decisions are most appropriately made by the majority of the community members. The Minister's role is simply to ratify such community resolutions. The Minister of Rural Development and Land Reform and the relevant community are therefore regarded as co-owners of communal land.

This situation will change once the Communal Land Rights Act (CLARA), 2004 (Act No 11 of 2004) is implemented. In terms of CLARA, formal land ownership rights will be transferred from the Minister of Land Affairs to communities who have informal rights to land.

The Restitution of Land Rights Act, 1994 (Act No 22 of 1994) that provides for the restitution of rights in land in respect of which persons or communities were dispossessed under or for the purpose of furthering the objects of any racially based discriminatory law, has an impact on the forestry sector. Approximately 65% of privately owned plantations are under land claims and this will have an impact on the sector, especially in terms of securing the resource for future operations.

3.5.5 LABOUR LEGISLATION

The labour laws in South Africa are considered as some of the most progressive in the world. These laws have significant implications for the forestry sector and place an obligation on the sector to implement and promote fair labour practice and ensure employees are exposed to healthy and safe work environments.

3.6 FOREST SECTOR BBBEE CHARTER

The Department, in collaboration with the sector and labour has developed a Forest Sector BBBEE Charter which is a growth and transformation Charter. The Charter was signed on 22 May 2008 in Cape Town. It is the major instrument for development within forestry in the medium term.

This Charter applies to all enterprises involved with commercial forestry and first-level processing of wood products. This covers the following sub-sectors:

- » Growers sub-sector (plantations, nurseries and indigenous forests)
- » Contracting sub-sector (forestry contractors in silviculture, harvesting, fire-fighting services and other forestry contracting services that are not covered by their own Sector Charters)
- » Sawmilling sub-sector
- » Fibre sub-sector (pulp, paper, paperboard, timber board-product, woodchip and wattle bark manufactures)
- » Pole sub-sector (pole treatment plants)
- » Charcoal sub-sector (charcoal producers)

In general, the Charter incorporates targets for enterprises within the sector to achieve, in order to strengthen the positive role of the sector in contributing to economic growth and employment creation and in supporting rural and local development.

The Forestry BBBEE Charter has identified specific challenges that need to be addressed to ensure equity with growth in the forest sector. These include, among others, the following:

- i. Increased local supply of round wood to underpin sustainability and throughout the forestry value chain;
- ii. Sustainable supply and better utilization of the country's limited sawlog resources;
- iii. Increased local beneficiation in and through the fibre production sub-sector;
- iv. Greater equity in the entire value chain of forestry;
- v. Greater empowerment and profitability of existing small scale forest enterprises and ;
- vi. Linking forestry as a rural based industry with poverty eradication and local economic development.

3.7 ASGI-SA AND THE NATIONAL INDUSTRIAL POLICY FRAMEWORK

The Accelerated and Shared Growth-South Africa (ASGI-SA) is the instrument of development policy that aims to address the core objective of Government, i.e. to halve poverty and unemployment by 2014.

Both ASGISA and the National Industrial Policy Framework (NIPF) identify the forest sector as a sector that has potential for growth. The Industrial Policy Action Plan (IPAP) (published by the Department of Trade and Industry (DTI), August 2007) emanating from the NIPF, identifies the forestry, pulp, paper and furniture sector as a growth sector of the economy that needs to be developed in support of the ASGI-SA. The forestry, pulp and paper, and furniture sector is thus one of the four lead sectors that currently form the central focus for the implementation of the NIPF. This sector has the potential to bring jobs and income to poor rural communities. Increasing plantations in Eastern Cape and KwaZulu-Natal in the next 10 years will contribute to the province's growth and employment and stimulate processing activities, such as sawmilling and furniture.

The IPAP provides for a sector growth strategy and action plan for the forestry, pulp, paper and furniture sectors in which the Department of Trade and Industry (DTI) and DWAF must jointly take the lead. In terms of actions to be taken, the IPAP text states that "in order to realise growth in this sector, government has committed itself to:

- » Expediting the afforestation licensing process;
- » The confirmation of land rights for land holding communities;
- » Technical and financial support to emerging small growers; and
- » Improvements to transport infrastructure".

Key action plans have been developed to give effect to the above. It is important to note that the sector growth strategy and action plan covered in the IPAP is closely linked to the Transformation Charter for black economic empowerment in the Forest Sector. The Forest Sector Broad-Based Black Economic Empowerment (BBBEE) Charter emphasises the link between transformation and growth in the sector and outlines government and industry undertakings to give effect thereto. DAFF developed a "Strategic Plan for the Implementation of the Forest Sector Transformation Charter" to give effect to these undertakings. The Department of Trade and Industry also initiated a process for providing incentives under the Enterprise Investment Programme with a total funding of R5.6 billion in 2008/9.

3.8 INTERNATIONAL POLICY FRAMEWORK AND CO-OPERATION

South Africa is a Party and or Signatory to a number of International Conventions, Treaties, Agreements, Organisations and Bodies which place obligations on member States on forestry. The United Nations Convention on Biological Diversity

(CBD); the Convention on International Trade in Endangered Species of Wild Fauna and Flora; United Nations Forum on Forests (UNFF), Committee on Forestry (COFO) under the auspices of the United Nations Food and Agriculture Organisation and the SADC Regional Protocol on Forestry are the among such. The Committee on Forestry (COFO) is the highest FAO Forestry statutory body. The biennial sessions of COFO bring together heads of forest services and other senior government officials to identify emerging policy and technical issues, to seek solutions and to advise FAO and others on appropriate action. Other international organizations and, increasingly, non-governmental groups participate in COFO.

The United Nations Forum on Forests (UNFF) was established by the Economic and Social Council of the United Nations (ECOSOC) as a subsidiary body with the main objective to promote the management, conservation and sustainable development of all types of forests and to strengthen long-term political commitment.

Establishment of UNFF was preceded by a five year period of dialogue on international forestry policy. This dialogue took place between two bodies namely the Intergovernmental Panel on Forests (IPF), established by the Commission on Sustainable Development (CSD) and the Intergovernmental Forum on Forests (IFF), established by ECOSOC.

PART TWO: FORESTRY SECTOR CHALLENGES

4. KEY CONSTRAINTS TO FORESTRY GROWTH

The forestry sector faces various challenges and constraints that may hamper the sector to realize its full potential in terms of its contribution to sustainable development. The Department, in consultation with stakeholders identified the challenges and potential strategic interventions to address the challenges.

4.1 CHALLENGE I: LAND REFORM

Many studies have shown that tenure security is a major requirement for forestry investment and development. The problem is in defining the rights, roles and responsibilities associated with forest use which are crucial for the poor to receive an equitable share of the benefits from forestry. At present, great uncertainty exists over the long-term ownership of forest lands. It is estimated that 60% of Komatiland (state-owned plantation), 48% of Mondi's 375 000 ha land and 17.5% of SAPPI's 540 000 ha privately owned plantations are subject to land claims. In the absence of the speedy resolution of these claims many people are not certain about how the benefits will eventually be shared. Uncertainty also exists on the ground with regards to the powers and responsibilities of traditional authorities and local communities in the management and control of woodlands, indigenous forests and woodlots in communal areas post-1994. But this is also a local issue, and may require intervention through local council by-laws. The emergence of new municipal structures in rural areas and their roles and responsibilities vis-à-vis those of traditional authorities are not well understood and have effectively weakened local control over forest resources in many areas of the country. The Department of Rural Development and Land Reform (DRDLR) is developing policy in this area, to allow greater security in all South Africa's land tenure systems and has recently adopted a model that will be used to settle land claims on privately owned plantation areas. DAFF together with DRDLR and affected communities will continue to address land reform in communal areas.

4.1.1 POST SETTLEMENT SUPPORT TO COMMUNITIES/COMMUNITY READINESS

Support to communities for forestry development in the form of policies, programmes or technically is inadequate and / or ineffective. Access to extension support services is critical for the success of emerging entrepreneurs. Industry cooperatives and companies play an important role in providing these services. However, these are focused mainly to ensure the supply of raw material to the corporate forestry companies for processing purposes. There is a need to extend such services to the entire value chain so that emerging entrepreneurs can enter and benefit along the entire value chain. Government therefore has a role to play in availing these services to fast track access to opportunities in the entire value chain for emerging entrepreneurs and for those growers who do not wish to be linked to a market but want to establish themselves independently.

4.1.2 TRANSFER TO COMMUNITIES AND COMMERCIALISATION OF STATE ASSETS

The Department manages the current Lease agreements involving state assets that were privatised / restructured. During the restructuring process other agreements, such as the Shareholders agreement and Business Sale agreement, were concluded by the Department of Public Enterprise (DPE). These agreements have implications on the success of the current long term lease agreements, especially as it relates to benefits to land beneficiaries.

The initial restructuring approach did not result in sufficient community beneficiation and have resulted in communities only entitled to rental and 10% share holding. In view of these anomalies DAFF together with DRDLR and DPE are working on a model which will result in the equitable beneficiation of communities with the Komatiland forestry package. The model to be developed must be acceptable to the various land beneficiaries affected.

With regards to category B and C plantations, DAFF will in line with the principles of government land reform policy transfer the assets to the rightful land beneficiaries with the view to retain forestry as a land use. DAFF will assist communities with the business model that will ensure the involvement of a strategic partner. The identification and verification of land beneficiaries pose a challenge in finalising these transfers.

DAFF and DRDLR have developed a transfer model for implementation in the private sector. This model will result in the retention of all privately owned plantations for plantation forestry under long term lease agreements. Government through DAFF and DRDLR will monitor compliance with the long term lease on behalf of the communities. This model has not yet been implemented and community readiness referred to above will play an important role in ensuring the successful implementation of the model.

4.2 CHALLENGE 2: RAISING THE PROFILE OF THE FORESTRY SECTOR

The South African Forestry industry contributes significantly to the country's economic development, while it maintains high environmental standards. However, negative publicity from various sources often undermines and overshadows the contribution that forestry makes towards economic development in rural areas.

A recent study showed that the Department and industry do not do enough to promote the sector and that the general public has a neutral to negative perception of the forestry industry. There is therefore a need to raise the profile of the industry by, among others, convincing people to invest in the industry; encouraging students to make Forestry a career of choice; and informing consumers of timber products; about the environmental benefits of buying FSC-certified, South African timber vs. timber imported from uncertified sources etc.

4.3 CHALLENGE 3: TIMBER SHORTAGE IN THE COUNTRY

Over the last few years there had been several studies that confirmed the fact that the country is now beginning to experience a shortage of timber. This shortage can be expected to affect government's intentions to achieve a 6% economic growth rate. The effects of a shortage of timber is already evident in some parts of the country, where this is having an adverse effect on the sustainability of local sawmilling, pulp and paper operations and subsequently pose a threat to employment opportunities and local economies. It is anticipated that South Africa will in future not be able to meet its domestic demand for timber from the existing growing stock in timber (Table 4). This will affect the national economy through increased prices and lack of timber products to meet domestic demand. There are also risks involved with timber imports that include the introduction of pests and diseases, which may threaten our local forestry industry.

Table 4: Long Term Demand and Supply Scenario (Source: Forestry South Africa, 2007)

Five Year Period	Total Supply (tons)	Total Demand (tons)	Surplus (+) / Deficit (-) tons) / (%)	
2005 – 2009	20 550 761	23 249 214	-2 698 453	-13.1
2010 – 2014	20 087 199	23 932 910	-3 845 711	-19.1
2015 – 2019	18 609 931	24 650 053	-6 040 122	-32.5
2020 – 2024	19 454 356	25 448 516	-5 994 160	-30.8
2025 – 2029	18 666 332	26 372 899	-7 706 567	-41.4
2030 – 2034	18 134 701	27 501 409	-9 366 708	-51.7
Estimated sustainable supply	19 250 547	25 192 500	-5 941 953	-23.2

4.4 CHALLENGE 4: ACCESS TO FUNDING

Afforestation and forestry enterprise development require access to financial and extension support services. Forestry is a business that requires large amounts of capital to be invested over a long rotation period. The Forest Sector Transformation Charter proposes the establishment of a forest enterprise development Fund that provides for:

- » A forestry grant aimed at forest enterprise development (subsidising interest), and
- » Seed funding for the development of fires insurance scheme for emerging growers

4.5 CHALLENGE 5: SKILLS SHORTAGE IN FORESTRY SECTOR

The Forest Sector Charter identifies the dire shortage of critical, scarce and core skills as well as shortcomings in skills development infrastructure in the sector as key constraints to transformational growth. A concerted and coordinated sector initiative is required to address this challenge. The Forest Sector Transformation Charter highlights the need to develop and implement a sector skills plan through FIETA and the Forestry Paper Pulp and Timber Chambers. The Department must play an active role through their participation in FIETA and contribute to the sector leadership role initiative.

4.6 CHALLENGE 6: RESEARCH DEVELOPMENT AND INNOVATION

A study commissioned by the Department into the current activities and future requirements for Research and Development (R&D) in the Forestry sector has found that with the exception of a few pockets of excellence, forest sector R&D activities suffer from under-funding, lack of co-ordination and a declining skills base and that this situation has to be rectified to ensure that South Africa's national development imperatives in the forestry sector can be met. This also undermines the country's ability as signatory to a number of international and regional conventions (e.g. NEPAD and SADC Protocol), that deal with forestry R&D collaboration, to adequately fulfil its international obligations. Insufficient strategic leadership by both Government and Industry in forest sector R&D was identified as the major stumbling block in dealing with the challenges. The National R&D Strategy (2002) requires that Sector R&D strategies be prepared and that line departments must take the lead in sectors they serve. A forest sector R&D strategy needs to be launched and the institutional capacity within the Department needs to be strengthened to take the lead in this regard. This need has also been highlighted in the Forest Sector Transformation Charter.

4.7 CHALLENGE 7: CLIMATE CHANGE

This being a new challenge facing the globe, South Africa will also be negatively impacted by this phenomenon. Currently there is no comprehensive data or information on this aspect to enable informed decision-making. Climate Change, and the role that forestry can play in mitigating the impacts of climate change, is now widely accepted as one of the most significant global issues. It is anticipated that Climate Change will have significant impacts on forestry in South Africa, at the same time forestry could offer meaningful mitigation possibilities.

The outcomes of the Bali 2007 meeting, indicate the need of reversing the rate of deforestation. Deforestation in developing countries accounts for an estimated 18 – 20% of global GHG (green house gas) emissions. This is perceived to be an area of early gain if deforestation can be halted.

Vulnerability as a result of climate change is probably the most important issue in South Africa. Climate models predict drying out of the Western Cape, while in the summer rainfall areas there already seems to be a trend of warmer temperatures, especially winters. From a mitigation point of view it is worth noting that the forestry sector in South Africa is a net sink of carbon (it removes more carbon dioxide than it releases). It is probably the only sector that can claim this, as agriculture emits more GHG than it removes. However, the South African forestry baseline is small and curtailed by the dry climate, restrictions on water as well as biodiversity concerns.

4.8 CHALLENGE 8: FORESTRY PROTECTION

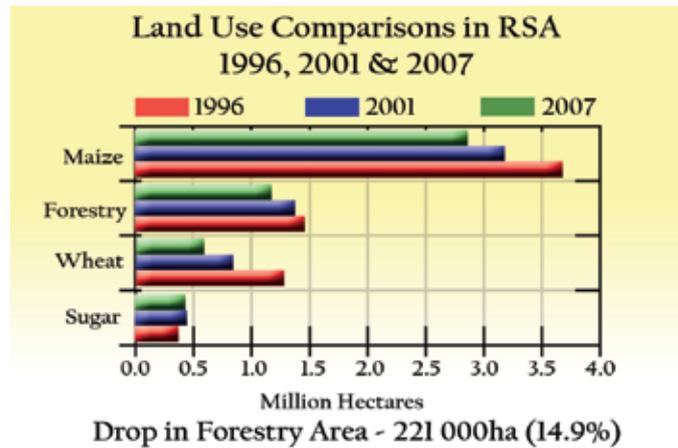
Whereas fairly clear mandates and legislative provisions exist for the protection of South Africa's biodiversity, South Africa still lags far behind the 15% target of natural areas under protection, which is globally widely pursued. Only 6.8% of South Africa's total land area is currently under formal protection. Even where protection measures are in place, there remain persistent pressures on protected areas from neighbouring communities, industrial and mining developments as well as urban development. Certain forest types are persistently under pressure from resource utilisation and development, for example coastal and scarp forests. One of the principles of the NFA is that natural forests may not be destroyed save under exceptional circumstances. It remains a challenge to enforce this principle. Once forests have been degraded, the damage is difficult to remedy and therefore it is vital that forest be maintained and utilised sustainably.

The definition of woodlands in the NFA covers both savannah and thicket. About 9% of the total area of savannah is contained in formally protected areas and 7% of the thicket biome. However, this legacy from the past does not reflect the actual conservation priorities within these biomes, as protection in the past was done on an ad-hoc basis. The Principles of the NFA requires that minimum areas of all different woodlands types should be protected. A serious constraint in conservation planning at present is the lack of adequate data, especially for some forest and woodland types. Inadequate mapping of natural forests and woodlands makes spatial planning for conservation difficult.

4.9 CHALLENGE 9: FORESTRY AND REGULATORY ENVIRONMENT

The small, medium and micro business sector in terms of contribution to GDP and employment partly arises from the sub-optimal regulatory environment. In the administration of tax, the planning system (including Environmental Impact Assessment), municipal regulation, the administration of labour law (specially on gender) and, in specific sectoral regulatory environments, regulation unnecessarily hampers the development of businesses. Growth especially in the commercial forest industry is constrained by a wide variety of legal requirements that negatively affect the business environment in South Africa in general and the forestry sector in particular (See Figure 2).

Figure 2: Land Use comparisons in South Africa in different years.



Source: Department of Water Affairs and Forestry, 2008

There have been enormous gains in the regulatory system since 1994, with the 1998 National Forests Act (NFA) designed to promote sustainable use, co-operative governance and stakeholder participation. Despite this, the system remains restrictive in some areas, with excessive bureaucracy and overly constraining regulations. For example, it remains that there are number of challenges for small growers to obtain the necessary licences for afforestation under the National Water Act, 1998 and therefore many have established their plantations illegally. As a result, companies are now finding difficulty in supplying their mills with timber purchased from such small growers without affecting their certification conditions. Providing exemptions from the cumbersome licensing procedure might be one solution. Such an approach has been introduced within the NFA. However, only communities neighbouring State forests wishing to collect forest produce for domestic use are exempt from having to obtain a licence under the NFA. All other forest produce collection requires authorization from DWAF, and the practicalities of obtaining these licenses are fraught with problems.

4.10 CHALLENGE 10: MONITORING AND EVALUATION

Information is the cornerstone of adaptive management and sound decision making. Reliable and up-to-date spatial and non spatial information forms the basis for much of the operational and strategic planning in Forestry. Forest monitoring depends on the spatial baseline information and provides further quantitative and qualitative information that informs planning and decision making. Specific technical and subject information is further required on the range of forestry applications and technology. The National Forests Act (NFA) provides a strong mandate for forest monitoring and dissemination of the information generated through monitoring. At present a set of Criteria, Indicators and Measures (C&I) are available for promoting Sustainable Forest Management. These C&I should also form the basis for forest monitoring. However, the C&I are currently only applicable within the Department and performance against these instruments of measurement is weak. This undermines the ability of the Department to use this instrument for monitoring the sector as a whole.

PART THREE : THE FUTURE FORESTRY SECTOR

5. NATIONAL FORESTRY ROADMAP

5.1 PROBLEM STATEMENT

The sector has experienced a number of challenges which hindered the sector from realising its full potential contribution to job and wealth creation as well as conservation of biological diversity. The challenges range from inadequate supply of timber products; biased equity distribution in the value chain; contribution to poverty alleviation and economic development; and slow afforestation uptake due to cumbersome licensing processes within government. Furthermore the forestry industry is concentrated in few companies. These challenges threaten long term sustainability of the sector and needs to be addressed as matter of urgency and priority.

5.2 VISION

We aspire to be a vibrant, profitable, sustainable and growing forest sector, which significantly contributes to the country's economic growth, employment, poverty eradication and transformation in South Africa.

5.3 MISSION

Our mission is to promote a thriving forest sector which significantly contributes to the country's economic growth, employment, poverty eradication and transformation by wide consultation / participation in formulating and implementing policies of the forest sector in South Africa.

5.4 PRINCIPLES

The vision to grow and develop the forestry sector is based on the following broad principles:

- » Forests and forests resources to be treated as national assets
- » Policy to be formulated and implemented so as to promote democratisation
- » Forest management planning that promotes sustainable use, development and conservation of the forest resources
- » Forests are protected from negative effects of fire, pests and diseases and alien invader plants
- » People driven development and gender equity
- » Recognition of the scarcity of water resources
- » A competitive and value adding forest sector
- » Clearly defined, recognised and secure land tenure of forest areas
- » Cultural, ecological, recreational, historical, aesthetic and spiritual sites and services supplied by forests are maintained
- » Forests developed and managed so that persons or categories of persons previously disadvantaged by unfair discrimination are advanced
- » Decent employment conditions.

5.5 POLICY CONTEXT

This roadmap is informed by White Paper on Sustainable Forest Management (1997), National Forests Act, 1998 (Act No 36 of 1998), National Veld and Forest Fire Act, 1998 (Act No 101 of 1998), Forest Sector BBBEE Charter, ASGISA and National Industrial Policy Framework, and Governments' Programme of Action.

5.6 STRATEGIC OBJECTIVES

- SO 1 Facilitate improved timber availability and secure supply of timber to ensure sustainability of entire timber value chain;
- SO 2 Increase the contribution of all types of forests and related goods and services to the quality of life of South Africans with particular focus on rural and disadvantaged communities;
- SO 3 Promote conservation of forest biological diversity, ecosystems and habitats, while promoting the fair and equitable distribution of their economic, social, health and environmental benefits;
- SO 4 Facilitate skills development, awareness raising and information sharing with a view to enhance the profile of forestry as a sector;
- SO 5 Implement innovative ways to enhance and streamline the regulatory environment to assist the sector to be compliant while reaching its potential in terms of sustainable development;
- SO 6 Create enabling institutional and financial arrangements for sustainable forest management;
- SO 7 Maintain the South African forest sector as a knowledge-based enterprise, adapt to addressing constraints to growth in the sector and managing the risks to growth;
- SO 8 Strengthen international and regional partnership in order to enhance sustainable forest management.



5.7 FORESTRY ROAD MAP

Target	Action	Responsibility	Partners	Time frame
Strategic Objective 1: Facilitate improved timber availability and secure supply of timber to ensure sustainability of entire timber value chain.				
Short term and long term demand of fibre is met and sustained	Facilitate and support afforestation initiatives for identified 100 000 ha available land	DAFF	Industry/ DTI/ DWEA	MT
	Facilitate and support transport infrastructure plan for afforestation	DAFF	DoT/ DPW	MT
	Investigate the possibility of trading and investing in neighbouring countries particularly with respect to small enterprising	DAFF	DTI	LT
	Support the long and short rotations through promoting research and development	DAFF	DTI/ Industry/ DST	LT
	Strengthen efforts to the rehabilitation of Category B & C State Plantations	DAFF	SAFCOL	ST MT
Strategic Objective 2: Increase the contribution of all types of forests and related goods and services to the quality of life of South Africans with particular focus on rural and disadvantaged communities.				
Forest based economic, social and environmental benefits are enhanced and shared equitably	Development of National certification standards for self regulation of plantations and natural forests and review of its effectiveness.	DAFF	Industry/ DWEA	LT
	Promote and support certification of small growers	DAFF	Industry	M
	Finalisation of a policy to allow greater security in South Africa's land tenure systems and implementation of an already adopted model aimed to be used to settle land claims on privately owned plantation areas.	DAFF	DRD&LR DWEA, Industry	MT
	Support measures aimed at rehabilitation and conservation of woodlands and natural forests.	DAFF	DWEA	ST
	Develop and implement a system for effective access to and management of off-take from woodlands and natural forests	DAFF	DWEA	ST
	Support implementation of the Forest Transformation Charter.	DAFF	Charter Council	ST
Strategic Objective 3: Promote conservation of forest biological diversity, ecosystems and habitats, while promoting the fair and equitable distribution of their economic, social, health and environmental benefits.				
Area of protected forests is increased	Accelerate transfer of forest assets to appropriate conservation agencies	DAFF	DWEA CAs DRD&LR	MT
	Support classification updates and mapping of identified woodlands and natural forests for conservation, livelihoods and reporting purposes.	DAFF	DWEA	MT
	Support expansion of protected area network, focusing on under-conserved natural forest and woodland types.	DAFF	DWEA	LT

Target	Action	Responsibility	Partners	Time frame
Strategic Objective 4: Facilitate skills development, awareness raising and information sharing with a view to enhance the profile of forestry as a sector.				
Forestry sector skills development strategy implemented	Develop an implementation plan to give effect to the Skills Development Strategy	DAFF	FIETA Industry	ST MT
	Promote the sector through communication campaigns in schools	DAFF	FIETA Industry	ST
Forestry considered as career of choice	Develop and implement a high – level awareness raising programme associated with the International Year of Forests.	DAFF	Media	ST
Benefits from forests are communicated to all	Disseminate the Forest Sector Charter to all stakeholders	DAFF	FIETA Charter Council	ST
	Facilitate development, recruitment and retention of scarce skills in the forestry sector nationally and internationally	DAFF	Tertiary Institutions Industry	MT LT
	Ensure mainstreaming of forestry in planning process of other spheres and tiers of government as well as other sectors	DAFF	Prov. & Local Departments	LT
Strategic Objective 5: Implement innovative ways to enhance and streamline the regulatory environment to assist the sector to be compliant while reaching its potential in terms of sustainable development.				
Regulatory environment is effective, efficient and promote transformation of the sector.	National Forest Act amended to ensure better compliance.	DAFF	Industry	ST LT
	Amendment of National Veld and Forest Fire Act to provide for municipal support to fire management.	DAFF	Municipalities	ST
	Review the water licensing process for afforestation.	DAFF	Industry DWEA	LT
	Develop and implement a monitoring system to ensure sustainable forest management and its value.	DAFF	Industry DWEA	LT
	Develop a system for evaluating economic benefit of forests	DAFF		LT
	Monitor the performance of the forestry sector in terms of sustainable forest management against P C I & S.	DAFF	DWEA Industry	LT
	Address compliance issues in terms of existing plantations and assist where rehabilitation is required	DAFF	Industry	ST
Strategic Objective 6: Create enabling institutional and financial arrangements for sustainable forest development of the forest sector.				
Institutional and financial arrangements that support sustainable forest management are in place	Establish funding mechanism and secure funds to promote forest enterprise development.	DAFF	Treasury	MT
	Establish a comprehensive post land settlement support service within the Department that in partnership with the industry will provide support to communities and land claimants.	DAFF		ST

Target	Action	Responsibility	Partners	Time frame
Strategic 7: Establish the South African forest sector as a knowledge-based enterprise, adept to addressing constraints to growth in the sector and managing the risks to growth.				
	Establish a centrally managed facility for all agreements related to transfer of State forests.	DAFF	DRD&LR National Treasury	ST
	Support community, public, private partnerships in and across forestry sector	DAFF	National Treasury Financing Institutions	MT
The Forestry sector has access to information, appropriate technology and innovation to support transformation and enterprise development, while protecting and conserving the resource base.	Develop and implement a Forest Sector research and development strategy with clearly outlined responsibilities, funding mechanisms and timelines	DAFF	DST Tertiary Institutions. CSIR, ARC, Industry	MT
	Develop and implement a national strategy for the control and prevention of forest fire.	DAFF	Industry Research Insts. DTI	MT
Development and management of forests in South Africa takes into account international obligations and does not harm but strengthens forestry sectors in the region.	Ensure that the strategy to prevent and control pests and diseases is functional and effective.	DAFF	Industry Research Insts.	LT
	Support efforts to promote the natural-fibre world development and commercialisation of new biological products	DAFF	DTI, Industry	MT
	Support measures to create and maintain an adequate body of excellent professionals addressing forest sector STI needs, supported by an effective set of institutional arrangements	DAFF	Industry Tertiary Insts. CSIR DST	MT
	Maximise the aggregate of beneficial goods and services from the forest sector in South Africa through the rehabilitation, growth and sustenance of the resource base and the minimisation of waste.	DAFF	Industry DWEA	LT
	Continuously improve the performance of forests to optimise and sustain the yield of forest goods and services from the land.	DAFF	Industry	LT
	Develop adaptive responses to economic, market and technology scenarios as well as climate change scenarios.	DAFF	DST DWEA	LT

Target	Action	Responsibility	Partners	Time frame
Strategic Objective 8: Strengthen international and regional partnership in order to enhance sustainable forest management.				
	Facilitate benefits related to availability of timber from the region	DAFF	DTI	ST
	Continue collaborations with SADC member states to ensure the ratification of the SADC Protocol on Forestry.	DAFF	SADC DIRC	ST
	Finalise the Strategy for the Implementation of the SADC Protocol on Forestry and collaborate with member states to initiate implementation.	DAFF		MT
	Collaborate with countries in the Region to facilitate compliance with the Non-legally binding instrument for sustainable forest management as adopted by UNFF7.	DAFF	DIRC UNFF	MT

6. RESOURCING THE ROADMAP

The Forestry Branch in the Department of Agriculture, Forestry and Fisheries is the primary custodian of this strategy and therefore its implementation. The Department should ensure proper coordination and collaboration with relevant stakeholders. The Department will however use existing structures as mechanisms for coordination and collaboration. These structures include the Transformation Charter Council, the National Forests Advisory Forum and the Forestry Stakeholder Forum. Where necessary, task teams or committees under these structures will be established to advise on specific issues with a view to facilitate effective implementation of, coordination, monitoring and reporting on the strategy.

The Branch will endeavour to commit 30% of its budget for the successful implementation of this strategy. Furthermore, the Department will engage international donor institutions and countries to support afforestation programmes and initiatives. The Department will also support afforestation projects to be implemented under the CDM. The Forestry Sector Transformation Charter Council will be used as a vehicle for achievement of objectives of this strategy.

The Branch will use existing communication, awareness and outreach programmes and platforms to raise awareness about the strategy and report on its implementation to the public.

7. MONITORING, REPORTING AND REVIEW

The Forestry Branch within the Department of Agriculture, Forestry and Fisheries will be responsible for ensuring effective implementation of this strategy document as well as monitoring and review of the implementation plan. The Branch will work closely with Industry, the Transformation Charter Council and other Government Departments in its pursuit of implementing this strategy.

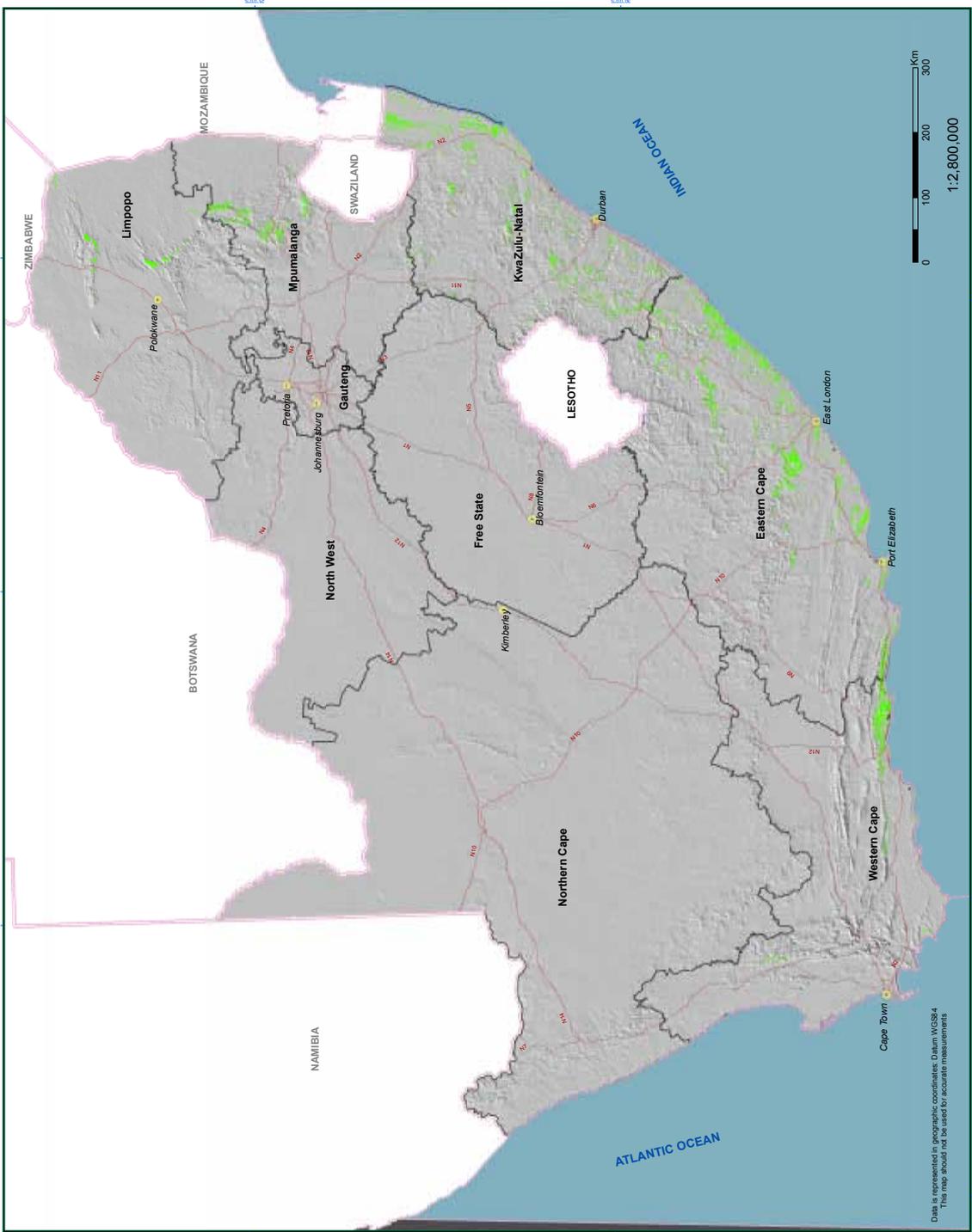
Monitoring and evaluation of the roadmap will be undertaken by the Department and will assist in determining whether the strategy should be reviewed. The roadmap should be reviewed when a significant number of milestones have been achieved.

REFERENCES

- Department of Environmental Affairs and Tourism (2004): A National Climate Change Response Strategy for South Africa - September 2004. Department of Environmental Affairs and Tourism
- Department of Environmental Affairs and Tourism: The National Protected Area Expansion Strategy 2008- 2012. February 2008: South African Biodiversity Institute and National Department of Environmental Affairs and Tourism. Unpublished
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- Department of Water Affairs and Forestry (2005): A Woodland Strategy Framework for the Department of Water Affairs and Forestry- June 2005, Pretoria.
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- Department of Water Affairs and Forestry (2008): Abstract of South African Forestry Facts for the year 2006/2007 Leaflet, Department of Water Affairs and Forestry. Pretoria.
- Forestry South Africa (2008): Abstract of South African Forestry Facts for the Year 2006/2007. Forestry South Africa: September 2008. and in www.forestry.co.za



REPUBLIC OF SOUTH AFRICA: NATURAL FORESTS



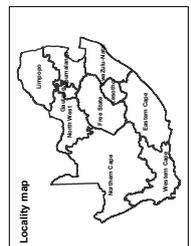
Legend

- Major Cities
- National Roads
- International Boundary
- Natural Forests
- RSA Provinces
- Ocean



Total Forest Resources
 Natural Forests: 493 770 hectares (0.4% of the land area of South Africa)

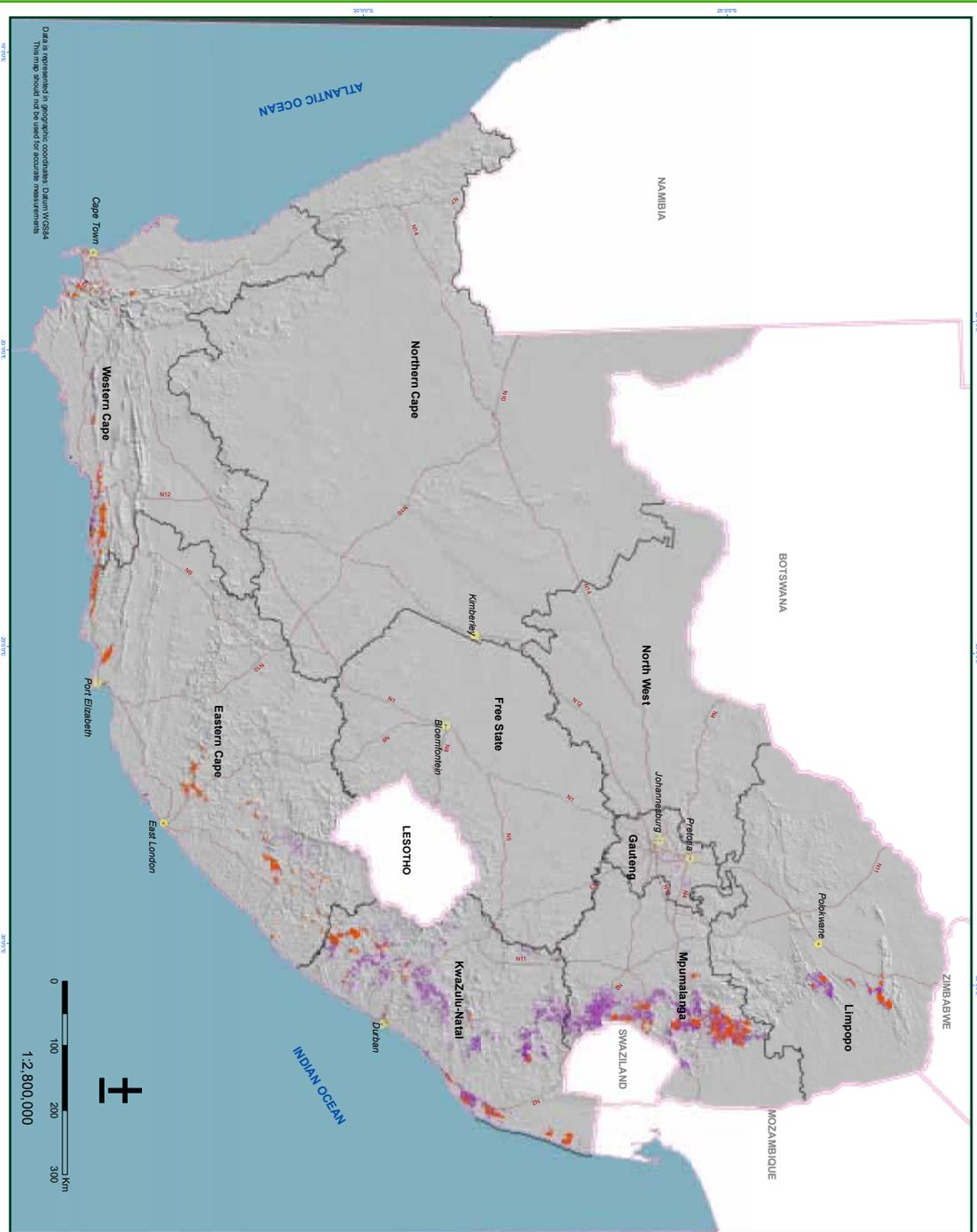
Data Source:
 National Forest Inventory
 MCL 2000 Private Plantations, Thicket and Woodlands
 Chief Directorate: Surveys and Mapping
 Dept. Land Affairs: Boundaries, Towns, Roads
 Produced by:
 Geospatial Information and Information Services
 Sub-Directorate: Forestry/Information Services



1:2,800,000

Data is represented in geographic coordinates. Datum WGS84
 This map should not be used for accurate measurements

REPUBLIC OF SOUTH AFRICA: COMMERCIAL FORESTS



Data is represented in geographic coordinates: Datum: WGS84
 The map should not be used for accurate measurements



Legend

- Major Cities
- National Roads
- International Boundary
- RSA Provinces
- DWAF Owned/leased Plantations
- Private Plantations
- Ocean

Total Forest Resource
Commercial Forests: 1,289 019 Hektars
1,289,019 Hektars of South Africa

NET VALUE'S RESOURCE COMPANIES

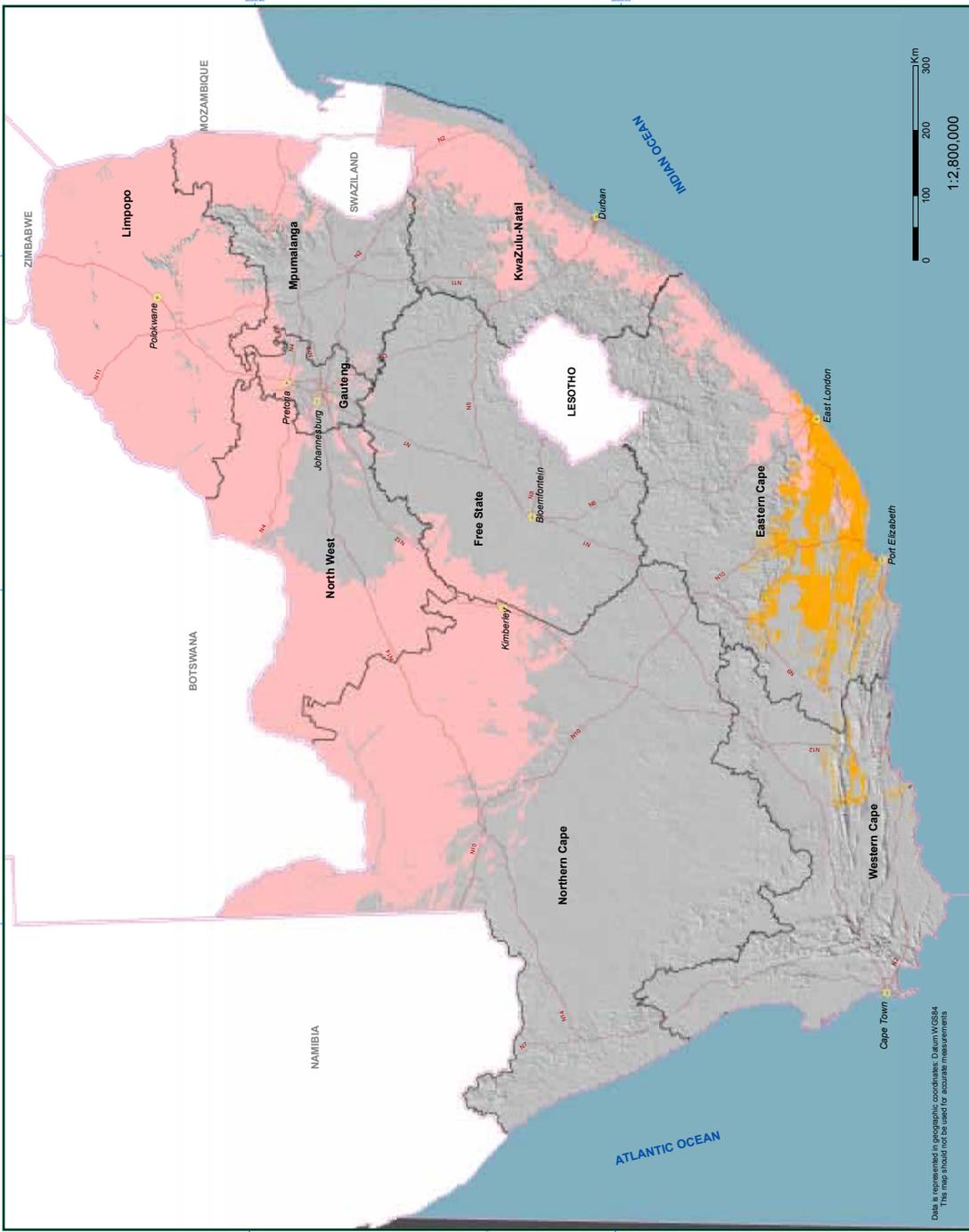
MAJOR VALUE'S COMPANIES

- 1. 14 owners, located in 14 different states
- 2. Total area managed: 271 100ha
- 3. Total area planted: 10 000ha
- 4. 100% owned by the state (South Africa)
- 5. 100% owned by the state (South Africa)
- 6. 100% owned by the state (South Africa)
- 7. 100% owned by the state (South Africa)
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- 18. 100% owned by the state (South Africa)
- 19. 100% owned by the state (South Africa)
- 20. 100% owned by the state (South Africa)

NET VALUE'S RESOURCE COMPANIES

- 1. 14 owners, located in 14 different states
- 2. Total area managed: 271 100ha
- 3. Total area planted: 10 000ha
- 4. 100% owned by the state (South Africa)
- 5. 100% owned by the state (South Africa)
- 6. 100% owned by the state (South Africa)
- 7. 100% owned by the state (South Africa)
- 8. 100% owned by the state (South Africa)
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- 16. 100% owned by the state (South Africa)
- 17. 100% owned by the state (South Africa)
- 18. 100% owned by the state (South Africa)
- 19. 100% owned by the state (South Africa)
- 20. 100% owned by the state (South Africa)

REPUBLIC OF SOUTH AFRICA: WOODLANDS AND THICKETS





water & forestry
Department of Water Affairs and Forestry
REPUBLIC OF SOUTH AFRICA

Legend

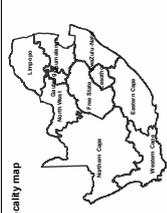
- Major Cities
- National Roads
- International Boundary
- RSA Provinces
- Thickets
- Ocean
- Woodlands



Data Source:
DWA: Forest Resources, Thickets and Woodlands
Chief Directorate Surveys and Mapping
Dept. Land Affairs: Boundaries, Towns, Roads

Produced by:
Geomatics, Technical and Information Services
Sub-Division: Geomatics Information Services

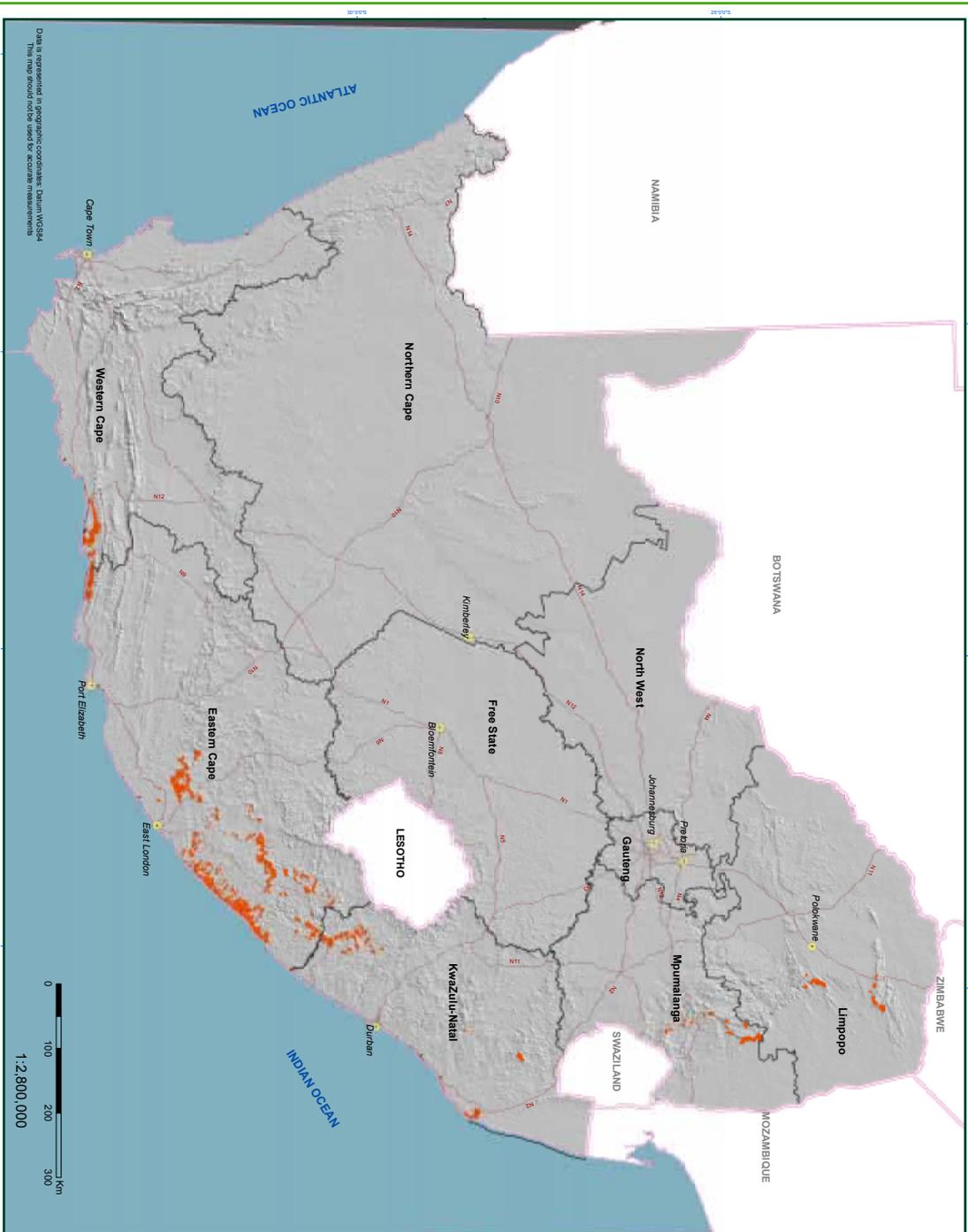
Locality map



Rural Forest Resources
Thickets: 2 912 226 hectares (24% of land area in South Africa)
Woodlands: 3 992 200,56 hectares (32% land area in South Africa)

Data is referenced in geographic coordinates. Datum: WGS84
The map should not be used for accurate measurements

REPUBLIC OF SOUTH AFRICA: STATE NATURAL FORESTS



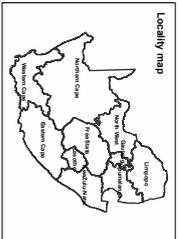
Legend

- Major Cities
- National Roads
- International Boundary
- RSA Provinces
- Natural Forests
- Ocean



Total Forest Resources
 Natural Forests: 482 770 hectares (0.4% of the land area of South Africa)

Data Source:
 Data provided by the Department of Forestry, Game and Fisheries, Forestry Division, Forest Management and Planning Unit, Pretoria, South Africa.
Produced by:
 Directorate: Forestry Technical and Information Services
 Sub-Division: Forestry Information Services



ANNEXURE B

ANNUAL PLAN OF IMPLEMENTATION

Actions	2009-2011	2012-2014	2015-2019	2020 - 2024	2025 -2027	2027-2030
1. Facilitate and support afforestation initiatives for the identified 100 000ha available land.	X					
2. Strengthen efforts to the rehabilitation of Category B & C State Plantations.	X	X				
3. Investigate the possibility of trading and investing in neighbouring countries particularly with respect to small enterprising	X	X	X			
4. Support the long and short rotations through promoting research and development.	X	X	X	X	X	X
5. Facilitate and support speedy uptake of afforestation initiatives in Eastern Cape and KwaZulu-Natal.		X	X			
6. Development of National certification standards for self regulation of plantations and natural forests and review of its effectiveness.	X	X	X	X		
7. Promote and support certification of small growers.	X		X			
8. Finalisation of a policy to allow greater security in South Africa's land tenure systems and implementation of an already adopted model aimed to be used to settle land claims on privately owned plantation areas.	X					
9. Support measures aimed at rehabilitation and conservation of woodlands and natural forests	X	X				
10. Develop and implement a system for effective management of access to and off-take from natural forests and woodlands.	X	X				
11. Support implementation of the Forest Transformation Charter.	X	X	X	X	X	X
12. Accelerate transfer of forest assets to appropriate conservation agencies.	X	X	X	X	X	X
13. Support classification updates and mapping of identified woodlands and natural forests for conservation, livelihoods and reporting purposes.	X		X			X
14. Support expansion of protected area network, focusing on under-conserved natural forest and woodland types.		X	X	X		

Actions	2009-2011	2012-2014	2015-2019	2020 - 2024	2025 -2027	2027-2030
15. Develop an implementation plan to give effect to the skills development strategy.	X	X	X	X	X	X
16. Promote the sector through communication campaigns in schools	X		X			
17. Develop and implement a high – level awareness raising programme associated with the International Year of Forests	X					
18. Disseminate the Forest Sector Charter to all stakeholders	X					
19. Facilitate development, recruitment and retention of scarce skills in the forestry sector and internationally	X	X	X	X	X	X
20. Ensure mainstreaming of forestry in planning process of other spheres and tiers of government as well as other sectors	X	X	X	X	X	X
21. National Forests Act amended to ensure better compliance	X		X		X	
22. Amendment of National Veld and Forest Fire Act to provide for municipal support to fire management.	X					
23. Review the water licensing process for afforestation.	X					
24. Develop and implement a monitoring system to ensure Sustainable Forestry Management and its value.	X	X	X	X	X	X
25. Develop a system for evaluating the economic benefits of forest	X		X			
26. Monitor the performance of the forestry sector in terms of sustainable forest management against P C I & S.	X	X	X	X	X	X
27. Address compliance issues in terms of existing plantations and assist where rehabilitation is required	X	X				
28. Establish funding mechanism and secure funds to promote forest enterprise development.	X	X	X			
29. Establish a comprehensive post land settlement support service within the Department that in partnership with the industry will provide support to communities and land claimants.	X					
30. Establish a centrally managed facility for all agreements related to transfer of State forests.	X					
31. Support community, public, private partnerships in and across forestry sector	X	X				

Actions	2009-2011	2012-2014	2015-2019	2020 - 2024	2025 -2027	2027-2030
32. Develop and implement a Forest Sector Research and Development Strategy with clearly outlined responsibilities, funding mechanisms and timelines.	X	X	X	X	X	X
33. Develop and implement a national strategy for the control and prevention of forest fire.	X	X				
34. Ensure that strategy to prevent and control pest and disease is functional and effective	X		X			
35. Support efforts to promote the natural-fibre world development and commercialisation of new biological products.	X	X				
36. Support measures to create and maintain an adequate body of excellent professionals addressing forest sector STI needs, supported by an effective set of institutional arrangements.	X	X	X	X	X	X
37. Maximise the aggregate of beneficial goods and services from the forest sector in South Africa through the rehabilitation, growth and sustenance of the resource base and the minimisation of waste.	X	X	X	X	X	X
38. Continuously improve the performance of forests to optimise and sustain the yield of forest goods and services from the land.	X	X	X	X	X	X
39. Develop adaptive responses to economic, market and technology scenarios as well as climate change scenarios.		X		X		X
40. Facilitate benefits related to availability of timber from the region	X	X	X	X	X	X
41. Continue collaborations with SADC member states to ensure the ratification of the SADC Protocol on Forestry.	X	X				
42. Finalise the Strategy for the Implementation of the SADC Protocol on Forestry and collaborate with member states to initiate implementation.	X	X				
43. Collaborate with countries in the Region to facilitate compliance with the Non-legally binding instrument for sustainable forest management as adopted by UNFF7.		X	X			

