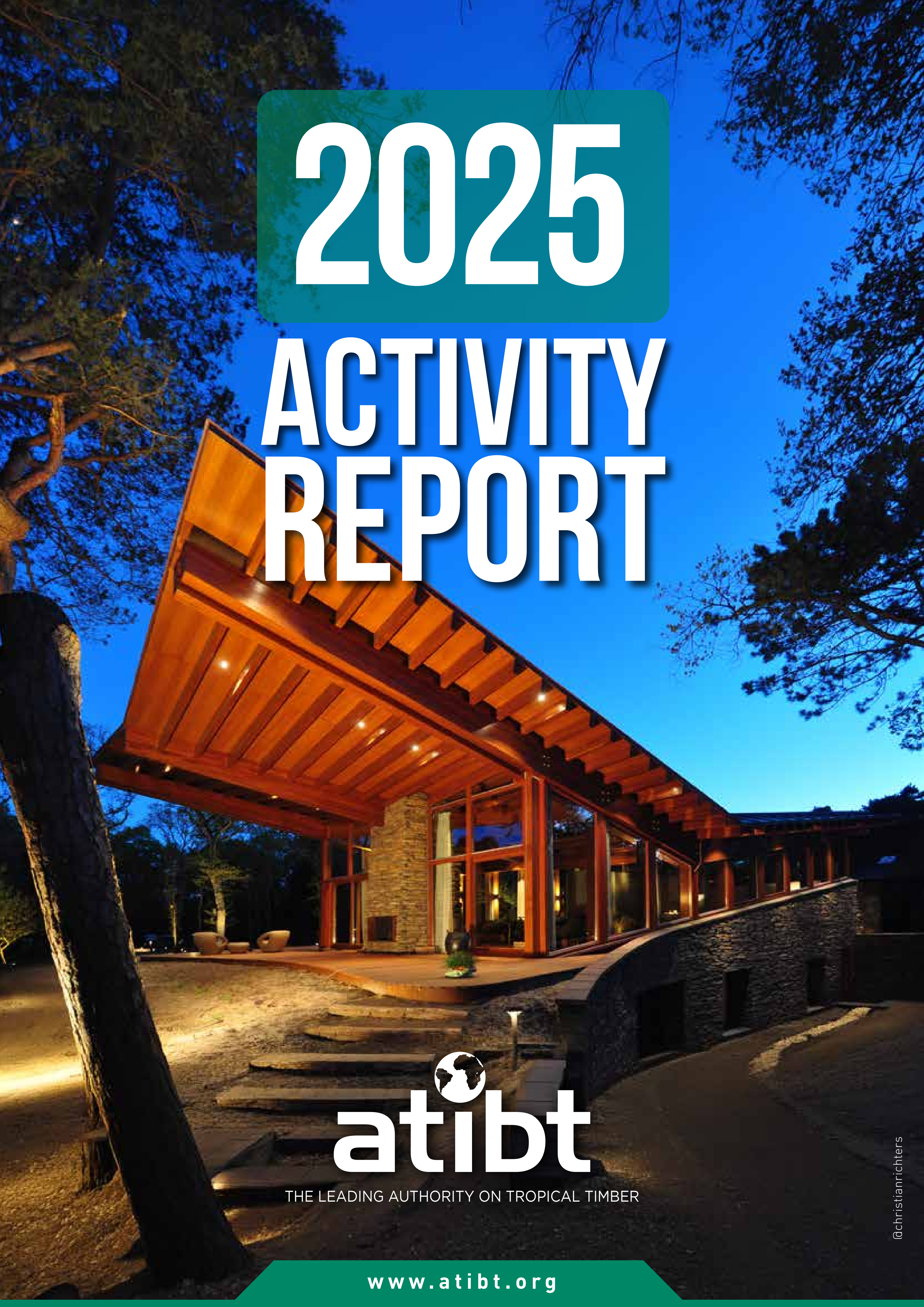
2025 ACTIVITY REPORT


@christianrichters

atibt

THE LEADING AUTHORITY ON TROPICAL TIMBER

www.atibt.org

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EDITORIAL

2025 was no ordinary year for the tropical forestry and timber sector. Between regulatory uncertainties related to the EU Deforestation Regulation (EUDR), customs uncertainties, trade barriers linked to CITES listings, and shrinking demand from China, operators in the sector had to demonstrate remarkable resilience. This annual report from our association bears witness to that.

Faced with these challenges, ATIBT chose to take action rather than wait. We organized EUDR preparation workshops in three producing countries, strengthened our support for national scientific authorities and management bodies in relation to CITES requirements, and assisted our members in implementing concrete traceability and due diligence tools. We have also organized capacity-building workshops and participated in the CITES CoP in Samarkand. These actions are not always visible from the outside, but they make a difference on the ground.

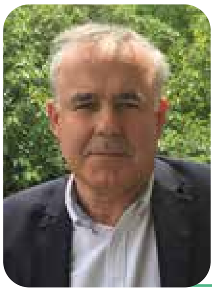
Certification continues to advance, with progress in FSC certification in northern Congo and PAFC certification in Gabon, Cameroon, and the Republic of the Congo. These results, achieved in a challenging context, confirm that sustainable forest management is not a distant ideal: it is an operational reality for a growing number of companies in our network.

We have also welcomed new members whose profiles illustrate the growing diversity of our community: producers engaged in local processing, as well as digital solutions designed to facilitate regulatory compliance. This diversity is our strength.

2026 promises to be a decisive year. The EUDR will take effect on December 30. And the Carrefour International du Bois (Timber Show) will be held in Nantes in June. We are enthusiastically preparing for this event, which we are convinced will be a highlight for the entire industry.

We hope you enjoy reading this report. It is deliberately more concise than previous ones: we wanted to focus on the essentials, highlight what really matters, and give you an accurate picture of what the industry is going through and what ATIBT is doing to support it.

FRANÇOISE VAN DE VEN
PRESIDENT OF ATIBT



BENOÎT JOBBÉ-DUVAL
GENERAL DIRECTOR OF ATIBT

ACRONYMS

ADEFAC: *Appui au développement de la formation en Afrique centrale* (Support for the Development of Continuing Education in the Forestry and Timber Sector in Central Africa)

AEIM: *Asociación Española de Importadores de Madera* (Spanish Association of Timber Importers)

AFD: *Agence Française de Développement* (French Development Agency)

ANAFOR: *Agence Nationale d'Appui au Développement Forestier* (National Agency for Forestry Development Support)

ATIBT: *Association Technique Internationale des Bois Tropicaux* (International Tropical Timber Technical Association)

ASP: *Appui Secteur Privé* (Private Sector Support)

CAFI: Central African Forest Initiative

CEI bois: *Confédération européenne des industries du bois* (European Confederation of Woodworking Industries)

CEMAC: *Communauté économique et monétaire de l'Afrique centrale* (Economic and Monetary Community of Central Africa)

CEPF: *Confédération Européenne des Propriétaires Forestiers Privés* (European Confederation of Private Forest Owners)

CFT: *Compagnie Forestière et de Transformation* (Forest Processing Company)

CIB: *Carrefour International du Bois* (International Timber Show)

CIRAD: *Centre de coopération Internationale en Recherche Agronomique pour le Développement* (Center for International Cooperation in Agricultural Research for Development)

CITES: Convention on International Trade in Endangered Species of Wild Fauna and Flora

CGDD: *Commissariat général au développement durable* (General Commission for Sustainable Development)

COMIFAC: *Commission des Forêts d'Afrique centrale* (Central African Forest Commission)

CONFORMA: Toward Concerted Forest Management in the Maya Biosphere Reserve

CoP: Conference of the Parties

CRCF: Carbon Removal Certification Framework

CST Forest (AFD): *Comité scientifique et technique* (Scientific and Technical Committee)

CTWPDA: China Timber & Wood Production and Distribution Association

DGENV: Directorate-General for the Environment (EU)

DRC: Democratic Republic of the Congo

DEU: Delegation of the European Union

DTM: Domestic Timber Market

EFI: European Forest Institute

EOS: European Organization for the Sawmill Industry

ETTF: European Timber Trade Federation

ETIC: European Timber Industries Confederation

EU: European Union

Eustafor: European State Forest Association

EUTR: EU Timber Regulation

EUDR: EU Regulation on Deforestation-free Products

FAO: Food and Agriculture Organization of the United Nations

FEP - EPF: *Fédération Européenne du Parquet* (European Parquet Federation) - European Panel Federation

FFEM: F*onds Français pour l'Environnement Mondial* (French Facility for Global Environment)

FIB: *Fédération des Industriels du Bois* (Federation of Timber Industries) (DRC)

FLEGT: Forest Law Enforcement, Governance, and Trade

FMU: Forest Management Unit

FSC: Forest Stewardship Council

GFBC: *Groupement de la Filière Bois du Cameroun* (Cameroon Timber Industry Association)

GGSC: Global Green Supply Chain

GIZ: *Gesellschaft fur internationale zusammenarbeit* (German Society for International Cooperation)

GNFT: *Groupe National sur les Forêts Tropicales* (National Tropical Forests Group)

GTI: Global Timber Index

IDH: Initiative for Sustainable Trade

IFL: Intact Forest Landscape

ITTO - OIBT: International Tropical Timber Organization – *Organisation internationale des Bois Tropicaux*

IWPA: International Wood Products Association

IUCN: International Union for Conservation of Nature

KFW: *Kreditanstalt für Wiederaufbau*

LCB: *Le Commerce du Bois* (renamed UICCB at the end of 2025)

LKTS: Lesser-Known Timber Species

LUTS: Lesser-Used Timber Species

LVS: Legality Verification System

MEF: *Ministère de l'économie forestière* (Ministry of Forestry Economy) (Republic of the Congo)

MIB: *Marché international du Bois* (Domestic Timber Market)

MINEF: *Ministère des Eaux et Forêts de l'Environnement du Gabon* (Ministry of Water and Forests) (Gabon)

MINFOF: *Ministère des Forêts et de la Faune* (Ministry of Forests and Wildlife) (Cameroon)

NDF: non-detriment finding

NGO: Non-Governmental Organization

OBC: Organization for Biodiversity Certificate

ONFI: *Office National des Forêts International* (National Office for International Forestry)

PAFC: Pan-African Forest Certification

PEFC: Program for the Endorsement of Forest Certification

PES: Payments for Environmental Services

PFBC: *Partenariat pour les Forêts du Bassin du Congo* (Partnership for the Forests of the Congo Basin)

PPECF: *Programme de Promotion de l'Exploitation Certifiée des Forêts* (Program for the Promotion of Certified Forest Management)

RESSAC: *Recherche appliquée en écologie et en sciences sociales en appui à la gestion durable des écosystèmes forestiers d'Afrique centrale* (Applied Research in Ecology and Social Sciences in Support of Sustainable Management of Forest Ecosystems in Central Africa)

RIFFEAC: *Réseau des Institutions de Formation Forestière et Environnementale de l'Afrique Centrale* (Network of Forestry and Environmental Training Institutions in Central Africa)

SME: Small and Medium-Sized Enterprises

SPIB: *Syndicat des Producteurs Industriels du Bois* (Union of Industrial Timber Producers) (Côte d'Ivoire)

STTC: Sustainable Tropical Timber Coalition

SW4SW: Sustainable Wood for a Sustainable World (FAO)

TDUK: Timber Development UK

TTTF: Tropical Timber Trade Facility

UFA: *Unité forestière d'aménagement* (Forest Management Unit)

UFIGA: *Union des Forestiers et Industriels du Bois du Gabon* (Union of Foresters and Timber Industry Professionals of Gabon)

ULG: University of Liège

UNICONGO: *Union patronale et interprofessionnelle du Congo* (Employers' and Interprofessional Union of Congo)

UICCB: *Union des Industries de la Construction et du Commerce du Bois* (Union of the Construction and Timber Trade Industry)

VVNH: *Vereniging Van Nederlandse Houtondernemingen* (Dutch Timber Federation)

WCO: World Customs Organization

WRI: World Resources Institute

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1

SOME HIGHLIGHTS IN 2025

1

The African rainforest is meeting its commitments thanks in part to the private sector's contribution

In 2025, certified areas in the Congo Basin continued to grow: Gabon, Congo, and Cameroon now account for more than 12 million hectares of certified forest, a sign that the underlying momentum continues despite a challenging regulatory and commercial environment.

2

EU Deforestation Regulation (EUDR): ATIBT at the Center of European Debates

The year 2025 marked a turning point in the implementation of the European Regulation on Deforestation-free Products (EUDR). Against a backdrop of significant uncertainty and intense debates over its application, ATIBT established itself as a recognized partner of European institutions on issues related to the tropical timber sector.

Throughout the year, the association supported companies in their preparations, organized technical workshops and webinars, and advocated on behalf of producers and operators in the sector before the European Commission, the European Parliament, and numerous partners.

This effort helped ensure that the EUDR was implemented in a way that was ambitious, realistic, and tailored to the realities of tropical sectors.

3

CITES: An Existential Challenge for Tropical Timber

The listing of several commercial timber species in CITES Appendix II has created new challenges for the relevant government agencies and economic operators. The effective implementation of the Convention's provisions requires significant mobilization of management bodies and scientific authorities, both in producing and importing countries. The difficulties encountered in the international trade in padauk in Gabon, for example, have highlighted the need for a harmonized understanding of the procedures related to non-detriment findings (NDFs) and permit issuance mechanisms. This situation underscores the importance of strengthening the technical and institutional capacities of the competent authorities, as well as developing tools and frameworks for cooperation to ensure the consistent and effective implementation of the Convention.

4

An Industry That Must Adapt in a Challenging Trade Environment

The European tropical timber market grew by 1% in volume in 2025, against a backdrop of sluggish construction activity and uncertainties related to new U.S. tariff policies. Chinese demand, down 27% for tropical logs, led several African exporters to redirect their shipments to Europe, putting further pressure on prices. At the same time, production costs unfortunately rose again, gradually undermining the viability of certain forestry companies. ATIBT has continued its dialogue with countries in the Congo Basin and European nations to foster a better understanding of the sector's challenges and support the model of socially responsible companies.

For some companies in the Congo Basin, this situation presented an opportunity to accelerate local processing and the diversification of their trade toward Europe.

5

On-the-Ground Actions That Yield Concrete Results

Seven major projects mobilized significant resources in 2025: UFA-REFOREST, ASP Cameroon, MIB Congo, ADEFAC, PASSAD,
ConForMa, and TTT collectively cover several countries and complementary themes — timber knowledge, forest enrichment, management, vocational training, regulatory compliance, and trade dialogue. These projects constitute ATIBT's operational arm in the field and enable the multiplication of resources.

6

Vocational Training Gets Off to a Strong Start

Following the Racewood event in Pointe Noire and the "Central African Cabinetmaking Grand Prix" (*Grand Prix d'Ébénisterie d'Afrique centrale*), the first phase of training for trainers has been completed. ADEFAC has helped consolidate the foundations of vocational training by structuring a continuing vocational training program for Central Africa's forestry and timber sector, developed jointly by companies and training institutions. The central challenge: improving the employability of industry stakeholders — both upstream and downstream — and strengthening the sector's competitiveness through skills development.

7

Publication of the Performance Guide for Tropical Wood Structures. Among other publications, ATIBT has released its new *Guide to Performance and Functional Requirements for African Tropical Wood Structures.* This guide serves as a reference document for project owners, architects, specifiers, and professionals seeking to incorporate tropical wood into their projects.

The creation of this Guide stems from a request by project owners — primarily architects — who wish to use tropical timber in public procurement projects due to the unique performance characteristics of these woods, and who may face certain challenges in drafting the Special Technical Specifications (CCTP).

This publication will be a key component of a "procurement" initiative that is set to be intensified in 2026, with the aim of providing ever-greater support for sustainable tropical timber.

2

ATIBT'S WORK ON BEHALF OF ITS MEMBERS

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ATIBT'S WORK ON BEHALF OF ITS MEMBERS

In 2025, ATIBT fully embraced its role as an interface between its members and a rapidly changing regulatory, commercial, and institutional environment. Against a backdrop marked by the postponement of the implementation of the European Deforestation Regulation — a major event of the year for the industry —, the decisions of CITES CoP20, and a persistently challenging market environment, the association mobilized all its resources to inform, equip, and represent the industry.

As it does every year, ATIBT coordinates its seven thematic committees — a permanent forum for collective intelligence among members, which is supplemented by active regulatory monitoring and regularly updated operational resources. The production of knowledge, technical data sheets, tools, and publications are a natural extension of this work.

Finally, international representation has reached an unprecedented level, with a presence in about ten professional and institutional forums around the world, and an unprecedented level of engagement on CITES and EUDR issues.

KEY FIGURES

Number of ATIBT members at the end of 2025	164
Publications and technical data sheets produced or updated	104
Newsletter subscribers by the end of 2025	6,594
ATIBT LinkedIn followers by the end of 2025	5,400
Events (organized, co-organized, or attended)	Over 20

2.1 REGULATORY MONITORING AND ATIBT COMMITTEES

ATIBT's technical support is based on two complementary pillars: a regulatory monitoring and coordination system, which was particularly active in 2025 in connection with the EU Deforestation Regulation (EUDR) as well as CITES-related topics, and a network of thematic committees that bring together members, researchers, and institutional partners one to three times a year to discuss targeted operational issues.

Regulatory Monitoring

In partnership with *Le Commerce du Bois* (LCB), ATIBT led a series of practical workshops focusing on the roles of stakeholders, the due diligence statement, the analysis of GPS coordinates, and the assessment of forest degradation risks. These sessions were supplemented by webinars co-organized with Deloitte and the CGDD, replays available to members, and regular updates to the dedicated FAQ on atibt.org. As part of the PASSAD-Forêt project, a national EUDR workshop was also organized in Côte d'Ivoire.

Regarding CITES, ATIBT implemented a structured support program focused on four key areas, in response to the practical challenges faced by operators since the listings adopted at CoP19.

EU Methodology – Import Permits. ATIBT produced and distributed a methodological note on the European procedure for importing species listed in CITES Appendix II, clarifying importers' obligations, the required documents, and checkpoints at EU borders.

National NDFs. In collaboration with the national scientific authorities of Cameroon, Congo, Gabon, and Côte d'Ivoire, ATIBT provided technical support for the development of Non-Detriment Findings (NDFs). The regional workshop in Douala (March 2025), organized with COMIFAC, FRMi, and the University of Gembloux, resulted in the approval of a harmonized regional framework, included in official CITES notification No. 2025/056 dated April 15.

Sapelli and Okoume – Strategic Monitoring. These two flagship species are subject to specific strategic monitoring due to their commercial importance and the risks of increased regulatory restrictions at the next CoP. ATIBT is coordinating the consolidation of population and management data to support robust NDFs and anticipate potential additional listing proposals.

Blocked Permits. Faced with repeated blockages of import permits — notably for Gabonese padauk, which was held up for ten months —, the ATIBT compiled and submitted a factual report to the European Commission and the relevant CITES authorities. A concrete compromise was reached at CoP20 in Samarkand: importing countries are now required to provide written justification for any permit denial.

Thematic Committees: A Driving Force for Collective Reflection

The committees draw their strength from the diverse experiences of their members: companies and organizations wishing to contribute are welcome to contact the ATIBT secretariat.

The committees are among the most dynamic parts of ATIBT. They bring together, on a voluntary basis, association members and external stakeholders to address the sector's major challenges, and meet two to three times a year to share analyses, feedback, and proposals for action.

There are seven active committees: Marketing, Certification and Regulation, Training, Wood Materials and Standardization, Forestry & Industry, Agroforestry and Plantations, and Carbon & Biodiversity. Each covers a strategic area directly related to the regulatory, technical, and market challenges faced by companies.

These working groups play a foundational role for the association: they enable ATIBT to stay in tune with realities on the ground, inform its positions and publications, and convey members' needs to senior management and the Board of Directors. In 2025, the committees continued their work throughout the year, contributing to the development of ATIBT's positions, strategic directions, and initiatives. Their main activities are outlined below.

Each committee has approximately 30 members, and meetings typically draw 12 to 15 participants.

The **Marketing** Committee brought together producers, traders, certification bodies, and partners to address the challenging economic climate, marked by a declining market and uncertainties related to the postponement of the EU Deforestation Regulation (EUDR) and regulatory tensions in producing countries. The committee spearheaded the launch of the "True/False" digital campaign addressing common misconceptions about certified tropical timber and worked on preparations for the 10th anniversary of Fair&Precious in 2026. It also supported the rollout of the performance and functional requirements guide for African tropical wood structures — now available in English — and monitored advocacy efforts targeting principals and architects.

In 2025, the committee was led by Bertrand Faucon (Stratemark) and Nathalie Bouville (ATIBT).

ATIBT's **Wood Materials & Standardization** Committee brings together experts from the sector — including CIRAD — to address technical challenges related to tropical wood products and their market introduction. It works to improve knowledge of the properties and uses of tropical timber species, participates in standardization efforts, and contributes to the development of technical guides and reference documents. Its activities aim to promote the use of tropical woods in construction and processed products, while supporting the evolution of standards and market requirements.

The committee finalized a benchmark study on the gluing of African tropical woods, oversaw the establishment of a wood characterization laboratory in the Congo as part of the MIB project, and supported the development of TROPIX. It also addressed current standardization issues, including the revision of Environmental and Health Declaration Sheets (FDES).

In 2025, the committee was chaired by Emmanuel Groutel (Wale), and Jean Gérard (CIRAD) served as secretary.

The **ATIBT Agroforestry & Plantation** Committee, created in 2018 in partnership with the *Cité du Développement Durable* in Nogent-sur-Marne, brings together ATIBT members and external stakeholders interested in these topics to exchange information, share experiences, and develop a common understanding of the role of agroforestry and plantations in tropical timber-producing countries. Its work focuses in particular on agroforestry models, forest plantations, the links between agriculture and forestry, as well as the economic, environmental, and social opportunities associated with these systems.

In 2025, under a new secretariat provided by a consortium comprising the University of Liège (Gembloux Agro-Bio Tech), ATIBT, and Guillaume Neve (Nature+), ATIBT's Agroforestry & Plantation Committee organized two online conferences, in February and July, to promote the sharing of experiences and the dissemination of knowledge among researchers, forestry companies, and technical partners. The February meeting focused on rubber-based agroforestry systems, the reforestation of forest concessions, seed orchards, and the performance of local tree species in plantations. The July meeting focused on the growth of local tree species in nurseries, as well as on carbon and biodiversity assessments in forest plantations and agroforestry systems. These discussions helped strengthen the technical knowledge necessary for the development of reforestation, agroforestry, and the sustainable management of tropical forests.

In 2025, the committee was chaired by Eric Penot (CIRAD) and Crispin Ilunga-Mula-la (GxABT), with Yanick Nkoulou (ATIBT) serving as secretary.

The Carbon & Biodiversity Committee Established in 2022, the ATIBT Carbon & Biodiversity Committee serves as a forum for discussion, monitoring, and reflection focused on financing mechanisms related to carbon, biodiversity, and ecosystem services. It aims to support ATIBT members in understanding regulatory, methodological, and market developments, while analyzing the opportunities these mechanisms could offer to companies committed to the sustainable and certified management of tropical forests.

The committee brings together forestry operators, consulting firms, certification bodies, experts, donors, and other partners interested in these topics.

It also helps amplify the voice of the tropical forest and timber sector in national and international debates regarding innovative financing, payments for environmental services, carbon markets, and emerging mechanisms for valuing biodiversity.

The committee generally meets three to four times a year and provides regular technical and regulatory updates, which are distributed to members in the form of newsletters and thematic summaries.

In 2025, the committee was led by Caroline Duhesme (ATIBT) and facilitated by Pierre Schueller and Coline Seller (TEREA).

The ATIBT **Forest & Industry** Committee serves as a forum for exchange and reflection, bringing together representatives of Africa-based forestry companies, engineering firms, and professional associations that are members of ATIBT. Its mission is to reflect on the future of forest management, particularly the renewal of management plans, while promoting improved wood processing in producing countries. The committee also aims to defend the interests of producers and processors in the wood sector of Central and West Africa, to support ATIBT's African members, to contribute to international debates on the sustainable management of tropical forests, and to bring together sector stakeholders to address the major technical, economic, and regulatory challenges facing the industry. It also serves as a liaison between producer and consumer countries to promote efforts in sustainable forest management and industrial development.

In 2025, the committee was chaired by Nicolas Bayol (FRMi), and Franck Monthe (ATIBT) served as secretary.

Certification & Regulation Committee: Created to support ATIBT members in navigating the constantly evolving market requirements, certification systems, and international regulatory frameworks, the Certification & Regulation Committee serves as a forum for exchange, monitoring, and reflection dedicated to issues of compliance, forest certification, and market access.

The committee's mission is to monitor developments in the main certification standards (FSC, PEFC/PAFC, and other relevant systems), as well as regulations affecting trade in tropical timber products, particularly measures related to legality, combating deforestation, traceability, and due diligence. It analyzes the impacts of these developments on industry operators and helps identify pragmatic solutions tailored to the realities of tropical production forests.

It promotes the sharing of experiences among industry stakeholders and helps convey their concerns and proposals to relevant institutions, standards-setting bodies, and international initiatives.

The committee's work covers, in particular, forest certification and chain-of-custody processes, the implementation of legality requirements, the EU Regulation on Deforestation-free products (EUDR), FLEGT initiatives, due diligence mechanisms, and changes in public policies that may influence access to international markets.

The committee generally meets once or twice a year and provides regular technical, normative, and regulatory monitoring, which is shared with members in the form of briefing notes, thematic summaries, and feedback on experiences through thematic email lists.

In 2025, the committee was chaired by Caroline Duhesme (ATIBT).

The ATIBT **Training** Committee aims to create a network that facilitates exchanges between training providers and those seeking training in the tropical forestry and timber sector. It brings together professionals from the industry and the training sector to discuss issues related to education, skills, occupations, and human resources development.

Its objectives include meeting the training needs of stakeholders in the sector, in areas such as production, processing, certification, sustainable forest management, and markets, as well as providing technical training in areas such as logging and sawmilling. The committee also works to improve education and training systems in Africa, centralize information on available training programs, and organize training sessions led by ATIBT. In particular, it is involved in capacity-building initiatives carried out by the association in partnership with specialized organizations such as RIFFEAC as part of the ADEFAC project.

In 2025, the committee was led by Elise Mazeyrac (ATIBT).

2.2 PRODUCTION AND DISSEMINATION OF KNOWLEDGE

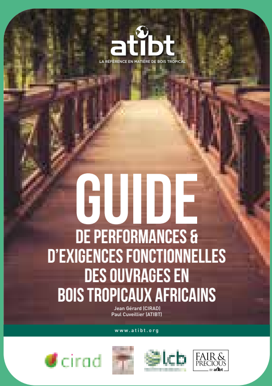
ATIBT acts as a bridge between research and the sector's operational needs: producing technical references that do not exist elsewhere, making them accessible to stakeholders who do not always have the means to commission studies, and providing them in formats that can be used in the field. This mission is becoming increasingly important as regulatory requirements — EUDR, CITES, construction standards — become more stringent and demand documented responses.

In 2025, this activity resulted in approximately 100 published or distributed resources, organized around two complementary categories.

Technical Publications

In 2025, ATIBT's knowledge production focused on three high-value-added contributions: two substantial technical guides intended for industry professionals, and the complete collection of booklets entitled "Contracts and Practices." These publications are available for free download on the ATIBT website; each is accompanied in this report by a QR code allowing direct access from the printed version.

Two major publications address specific requests from members and professional specifiers. They draw on ATIBT's technical expertise on topics where references were insufficient or lacking.



Guide on Wood Performance — CCTP

This practical guide assists project owners, contractors, and engineering firms in drafting the Special Technical Specifications (CCTP) for tropical wood structures. It details the technical specifications tailored to tropical wood species, including durability criteria, use classes, and installation requirements. A reference tool for promoting tropical wood in the construction and design markets.

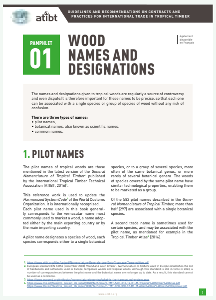
Download the guide

Guide on Gluing Tropical Woods

This technical guide covers all parameters related to the gluing of tropical woods: species characteristics, compatibility with adhesives, surface preparation, application conditions, and quality control. It addresses a need expressed by manufacturers and processors, for whom tropical woods have specific characteristics that general standards do not always adequately cover.

Download the guide

12 technical booklets — published in 2024–2025 available for free download at atibt.org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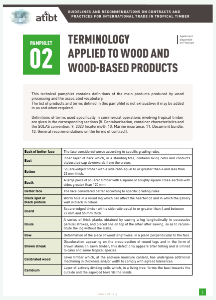
1. Wood names and designations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2. Terminology applied to wood and wood-based products


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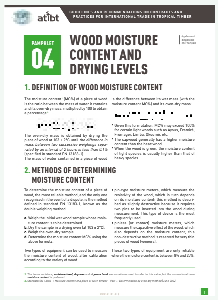
PAMPHLET 04 WOOD MOISTURE CONTENT AND DRYING LEVELS

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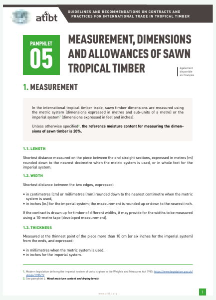
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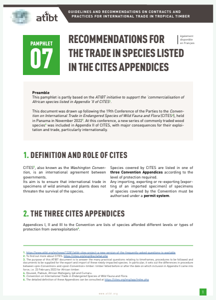
6. Eco-certifications, legality certifications and regulations relating to international trade in tropical timber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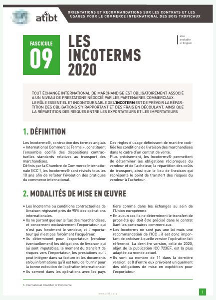
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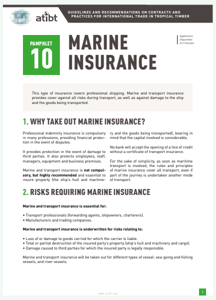
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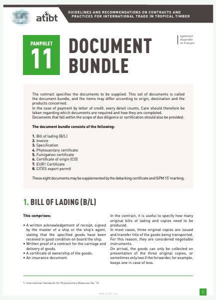
10. Marine insurance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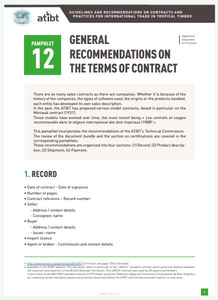
PAMPHLET 12 GENERAL RECOMMENDATIONS ON THE TERMS OF CONTRACT

12. General recommendations on the terms of contract

This collection serves as a reference tool for sales, logistics, and regulatory teams within companies in the industry. It is available in French and is intended to be translated.

Digital Tools Portal

Expanded in 2025 as part of the TTT project (BMZ/GIZ), ATIBT's Digital Tools Portal illustrates a specific approach to knowledge dissemination: rather than producing its own tools, ATIBT plays a monitoring and guidance role, identifying and evaluating digital tools useful to the industry to help its members navigate them. This service addresses a real need: faced with the proliferation of solutions available in the context of the EU Deforestation Regulation (EUDR), companies often struggle to identify the tools best suited to their specific circumstances.

The portal is organized into six thematic categories: *information and compliance platforms, databases and geospatial data, traceability tools, due diligence tools, support for sustainable forest management, and certification frameworks.* Each entry describes the type of tool, its purpose, and how to access it. The portal is freely accessible at atibt.org and will continue to evolve with contributions from members and the team.

2.3 COMMUNICATION AND NETWORK COORDINATION

In 2025, ATIBT's communication was structured around three complementary pillars:

- the association's institutional communication,
- highlighting key milestones in projects,
- market-focused communication driven by the **Fair&Precious** brand, targeting import markets.

This integrated strategy helped strengthen the visibility of tropical timber from sustainably managed forests and position ATIBT as a leading advocate for the sector on the international stage.

Fifty issues of the newsletter comprising 173 news items were disseminated in 2025, with an editorial focus on regulatory aspects: the EU Deforestation Regulation (EUDR) accounted for **37%** of the content, followed by certification and sustainable management (**13%**), markets (**11%**), and CITES (**7%**). The LinkedIn page grew by **15%** to reach 5,730 followers by year-end, complemented by a monthly LinkedIn newsletter launched during the year that quickly attracted 2,408 subscribers. This initiative was managed entirely in-house, without a dedicated budget.

The year's main market communication initiative, the Fair&Precious "True/False" campaign — funded as part of the TTT project (BMZ/GIZ) — was rolled out between October and November on LinkedIn and Instagram. Aimed at debunking misconceptions about tropical wood among construction professionals and specifiers, it generated nearly 40,000 views and a 72% positive sentiment rate. In terms of events, ATIBT participated in FOMADECIE in Brazzaville (April) and Racewood in Pointe-Noire (July), two events that were actively promoted on digital channels.

Also noteworthy was Caroline Duhesme's appearance on the program "Smart Impact," hosted by journalist Thomas Hughes on the online business channel B Smart on September 14.

2025 COMMUNICATION — KEY FIGURES

Newsletter and website

50
issues

173
news articles published

46
member news items shared

6 594
Subscribers as of the end of 2025

LinkedIn page

5,730
followers
(+15% over 1 year),

Monthly communication:
2,408
followers

Dominant editorial themes

EUDR
37%

Certification and sustainable management
13%

markets
11%

CITES
7%

Fair&Precious "True / False" Campaign

45+
publications

39,670
views

72%
positive sentiment

ATIBT'S ACTIVE PARTICIPATION IN MANY EVENTS

JANUARY

FGMC Forum
London, United Kingdom

MARCH

Journée internationale des forêts

International Day of Forests
Douala, Cameroon

MARCH

TRAFFIC Conference
Brussels, Belgium

MARCH

Tropical Timber Trade Facility

TTT Workshop
Yaoundé, Cameroon

FEBRUARY

CITES NDFs Regional Workshop
Douala, Cameroon

MARCH

WOW WORLD OF WOOD FESTIVAL

World of Wood Convention
New Orleans, USA

MARCH

COMMISSION DES FORETS D'AFRIQUE CENTRALE COMIFAC

International Women's Rights Day (COMIFAC)
Yaoundé, Cameroon

APRIL

ITTO

ITTO Conference
San José, Costa Rica

MAY

FOMADECIE
Brazzaville

MAY

Tropical Forest Forum
Cologne, Germany
(ATIBT, WWF, FSC)

JUNE

Africa Forest Forum
Online

JULY

CBFP Conference
Libreville, Gabon

JULY

INTPA Seminar
Brussels, Belgium

AUGUST

Woodworking Trade Fair SAMEB 2025
Brazzaville, Congo

JULY

Racewood
Pointe Noire, Congo

SEPTEMBER

Global Wood Trade Conference
Rizhao, China

SEPTEMBER

Macao Forum
Macau, China

OCTOBER

FSC General Assembly
Panama

DECEMBER

COP20 CITES
Samarkand, Uzbekistan

OCTOBER

Panels & Circular Economy Symposium
Bordeaux, France

NOVEMBER

COP30 Climate
Belém, Brazil

NOVEMBER

PAFC Forum
Online

2.4 INTERNATIONAL REPRESENTATION AND INSTITUTIONAL DIALOGUES

Presence in International Forums

In 2025, ATIBT intensified its engagement in international forums, representing the tropical timber sector on several fronts simultaneously: the implementation of the EU Deforestation Regulation (EUDR), CITES negotiations, and, more broadly, debates on combating environmental crime and the sustainable trade in forest resources.

Faced with the deadlines set by the EU Deforestation Regulation, ATIBT played a threefold role: serving as an institutional liaison with the European Commission and relevant authorities, acting as a spokesperson for European operators, and supporting tropical-wood-producing countries in their preparations. This role was demonstrated through several international engagements throughout the year: a presentation to the ITTO in San José (Costa Rica, April), a webinar as part of an ETIC meeting in Romania (May), a webinar for AIMEX (Brazilian importers), a presentation at the European Commission's INTPA meeting (July), and training for industry stakeholders as part of the *PASSAD-Forêt* project in Côte d'Ivoire. ATIBT also participated in the European Parliament conference on environmental crime (March 26, Brussels), where Caroline Duhesme spoke on the panel dedicated to resources and the role of the private sector in preventing environmental crimes.

The year 2025 was marked by an exceptional mobilization of ATIBT around CITES issues, ranging from the preparation of national tools to representation at CoP20. In March, the regional workshop in Douala, organized with COMIFAC, FRMi, and Gembloux Agro-Bio Tech, brought together some fifty participants to work on the drafting of Non-Detriment Findings (NDFs). The work culminated in the approval of a regional template and the official CITES notification No. 2025/056, published on April 15. From November 24 to December 5, an ATIBT-FRMi delegation accompanied Central African countries to CoP20 CITES in Samarkand. The proposals to delist *Afzelia bipindensis and Pterocarpus soyauxii* from Appendix II, supported by sound scientific arguments, received 47% of the votes in favor, a sign of growing regional credibility. A concrete compromise was reached on import permits, requiring importing countries to provide written justification for any refusal. CoP20 also highlighted the risk that *Entandrophragma spp. (sipo, sapelli, tiama, kosipo)* could be placed on the agenda of the next CoP, which serves as a strategic warning sign for the industry. In December, a webinar co-organized with the Zoological Society of London as part of the Biodiverse Landscapes Fund program brought together nearly 30 participants to share these results with members and build the capacity of companies in the Congo Basin.

Participation in International Trade Forums

ATIBT maintained an active presence at major industry events: World of Wood (IWPA trade show) in New Orleans, USA (March), *Interzum* in Germany (May), the FSC General Assembly in Panama (October) – featuring two side events organized by ATIBT on tropical forests and timber markets –, the CTWPDA Congress in Rizhao (China), the Precious Forest Foundation's Inf Forum, and COP30 in Belém (November).

3

KEY DATA AND INDICATORS

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3.1 DATA ON THE TROPICAL TIMBER SECTOR IN THE CONGO BASIN AND CÔTE D'IVOIRE

ATIBT Summary Table on Key Data for the Forestry and Timber Sector in the Congo Basin and Côte d'Ivoire.
Updated with contributions from OFAC-COMIFAC.

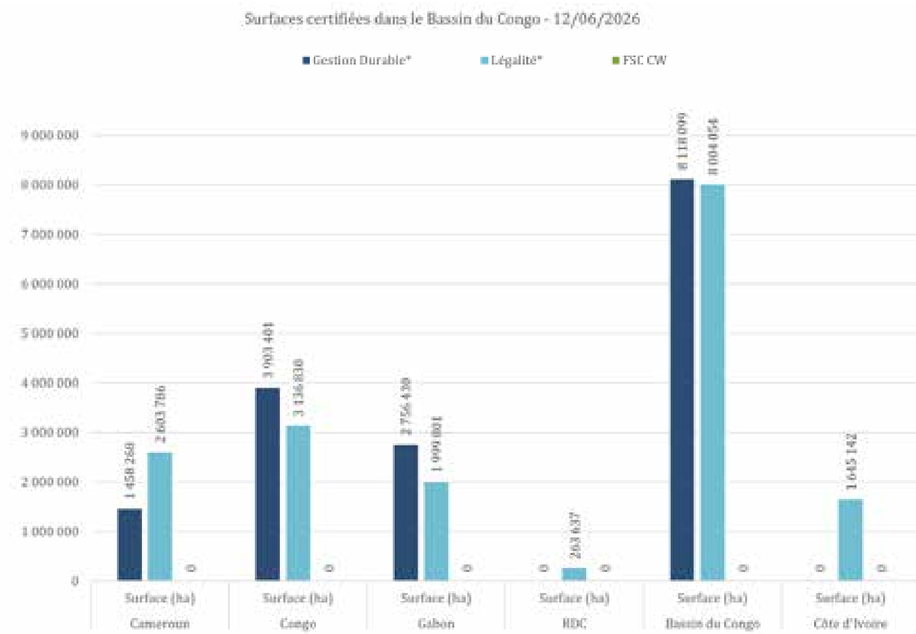
Elements of comparison	Cameroon	Gabon	Congo	DRC	CAR	Equatorial Guinea	Côte d'Ivoire
Forests and Logging							
Humid and dense forest area	20,3 million ha[1] 19,8 million ha (OFAC 2023)	23,5 million ha[1] 23 million ha (OFAC 2023)	21,9 million ha[1] 24 million ha (OFAC 2020)	126,1 million ha[1] 155 million ha (OFAC 2023)	22,3 million ha[1] 22,3 million ha (OFAC 2022)	2,45 million ha[1] 2,45 million ha (OFAC 2022)	2,97 M ha (MEF 2022)
Area allocated to industrial exploitation, excluding communal forests[2]	9,4 million ha (OFAC 2023)	19,55 million ha (OFAC 2022)	14,8 million ha (OFAC 2020	15,4 million ha[2] 14,98 million ha (OFAC 2022)	3,7 million ha (OFAC 2022)	0,82 million ha (OFAC 2022)	1,7 M ha (MEF 2022)
Total certified areas[3] **of which**	2,918 million ha (ATIBT 2025)	4,737 million ha (ATIBT 2025)	4,598 million ha (ATIBT 2025)	0,264 million ha (ATIBT 2025)	0 ha (ATIBT 2025)	0 ha (ATIBT 2025)	1,773 million d'ha (ATIBT 2025)
Sustainable Management (FSC FM, PAFC/PEFC)[4]	0,844 million ha	2,923 million ha	3,082 million ha	0 ha	0 ha	0 ha	0 ha
Legality (OLB, LS, TLV)[4]	2,6 million ha	2,069 million ha	2,676 million ha	0,264 million ha	0 ha	0 ha	1,773 million d'ha
Number of companies holding concessions	Approx. 60	Approx. 40	Approx. 30	Approx. 20 (of which 6 are inactive)	12 (OFAC, 2025) About ten	Approx. 10	119 (MEF 2022)
Formal log production[5]	3.34 million (2023)	3.64 million (OFAC 2024)	0.75 million (2024)	0.25 million (OFAC 2022)	0.77 million (OFAC, 2025) 0.71 million (OFAC 2024)	0,09 million (OFAC 2024)	1,4 million m^3 (MEF 2023)
Of which FSC (m^3)	176 000 (7%)	707 000 (23%)	517 000 (30%)	0	0	0	
Share of the top 4 producers in log production[6]	46,6%[13] (part d'exportation 2022)	36% (OFAC 2023)	58% (2018)	81,4% (OFAC 2022)	63% (OFAC 2024)	69% (OFAC 2024)	
Estimated informal artisanal production (in log equivalent)[7]	2,4 million	0,3 million	0,3 million	3,4 million	0,1 million		
Main species harvested by the industry	Tali (Missanda), Okan, Dabema, Awoura, Bilinga, Azobé (Bongossi), Eyong, Wamba, Limbali, Obeché (Obachi/Ayous/Samba/Wawa)	Okoumé (approx. 50%), Awoura (4%), Azobé (2%), Okan (2%)	Okoumé, Sapelli, Okan, Tali (Missanda), African Padauk, Iroko (Kambala), Sipo, Azobé, Kosipo, Ayous	Wenge, Afromosia, Tali, Sapelli, Mahogany	Sapelli, Obeché (Obachi/Ayous/Samba/Wawa), Iroko (Kambala), Doussié, Sipo, Tali (Missanda), African Padauk, Kosipo, Mukulungu, Eyoum	Okoumé (82%), Padauk, Tali	Mahogany, Iroko, Fraké, Framiré, Tiama, Sipo, Sapelli, Azobé
Share of the top 3 species in production[10]	48,6% (OFAC 2023)	56% (OFAC 2023)	57% (2018)	37% (2020)	66,7% (OFAC 2022)	89,2 (OFAC 2022)	
Artisanally harvested timber species[7]	Ayous, Movingui, Iroko, Sapelli, Bilinga, Moabi	Okoumé, Bilinga, Izombé	Okoumé, Limba (Sud), Sapelli, Sipo (Nord)	Afrormosia, Wenge, Sapelli	Ayous (90%) et Sapelli (10%)		Ayous, Makoré, Niangon, Bété
Log exports[8] in m^3	366 806 (OFAC 2022)	0	428,341 (OFAC 2024)	131 986 (2021)	264,954 (OFAC 2024)	56 164 (OFAC 2022)	0 (MEF 2022)
Log exports to China[9] in m^3	215 408 (OFAC 2022)	0	298 209 (2023)	41% (Congolese Control Office 2021)	147,815.792 (OFAC, 2024)		0 (MEF 2022)
Contribution of the forestry and timber sector to GDP[11]	4,9% (OFAC 2022)	3,9% (2023)	5.6% (2025)	0,15% (2016)	2.7% (2020)	0,29 (OFAC2022)	< 1 % (DEIF)
Wood Processing							
Number of industrial processing plants (1st to 3rd stage processing)[12]	227 (2021)	180 (OFAC 2023)	61 (2025)	5 (2018)	8 (2024)		221 (MEF 2022)
Production (m^3)[13]		(OFAC 2023)	(MEF, 2020)	N/A			0,9 M m^3
• of sawnwood	984 412 (2021)	666 547	320 000		61,905.79 (OFAC, 2024)		(MEF 2022)
• of plywood	121 024 (2017)	1 235 119	7 000		0	698	
• of veneers	8 000 (2017)	568 572	15 500		0		
Exports (m^3)[14]	(OFAC 2024)	(OFAC 2023)	(2024)	(2021)	(OFAC 2024)		0,23 M m^3
• of sawnwood	677,736	TBD	284,182.26	26,943	36,202		(MEF 2022)
• of plywood	11,675	TBD	N/A	0	0		
• of veneers	46,308	TBD	17,710.41	0	0		
Sawnwood exports to China[15] in m^3	87 613 (2021)	524 700 (2018)	91,756 (2024)	41% (Congolese Control Office, 2021)	5,802.926 to China (OFAC, 2024) 31,786.404 excluding CEMAC (OFAC, 2024)		
Artisanal processing (sawnwood)[17]	715 000 m^3 (2010)	50 000 m^3 (2010)	Approx. 100 000 m^3 (2011)	Approx. 1 million m^3 (2014)	33,000 to 34,000 m^3 consumed annually in Bangui and nearly 5,000 m^3 exported to Chad (CIFOR, 2014)		

Additional Information	The existence of a domestic timber market that is slow to materialize	Nkok Special Economic Zone (SEZ) More than 50 wood processing units Over 1 million m³ of processed logs per year (2022) [18]	In 2024, 56 destinations were recorded. China, with 522,920.515 m³ (69.75%) of the total validated volume, ranks first place. Belgium, with 41,086.131 m³ (5.48%), ranks second. Third place goes to Great Britain with 28,938.37 m³ (3.86%). France and the United States rank fourth and fifth, having reached 24,239.515 m³ (3.23%) and 18,100.711 m³ (2.41%). PIC SEZ established in Pointe Noire; first eucalyptus peeling plant installed; discussions underway regarding the production-sharing mechanism.	Maluku Special Economic Zone (SEZ), where one wood processing unit is installed. Kin Malebo SEZ currently under development.			The domestic timber market is growing rapidly
Public procurement	Decree signed on December 15, 2020: requirement to use legally sourced wood in public procurement	N/A	Under consideration	N/A			N/A
Socioeconomic Data							
Number of jobs in the industrial forestry sector	Approximately 15,000[19] (9,000 in logging and 6,000 in the processing industry)	13,182 jobs in the timber industries[20]	7,500 (4,250 in forest logging and 3,250 in the processing industry)	4,523[21]	8,000 in 2010 (CIFOR, 2014[22])		Approximately 50,000 direct jobs
Number of jobs in artisanal sawmilling	40 000	1000[23]	2 000	9,000 to 15,000[24] but probably many more (50,000 jobs according to Lescuyer in 2014)	1,600 steady jobs around Bangui and 420 in the urban markets (CIFOR, 2014)		
Indirect jobs	150 000	Between 2 000 and 5 000 [16]	500 016	N/A	4,000 (CDF, 2024)		
Professional associations in the forestry and wood industry	**GFBC** (11 forestry and industrial companies) **SYNEFOR** (5 forestry and industrial companies) **FECAPROBOIS** (200 SMEs and artisans) **ANCOVA** (450 SMEs and artisans in Yaoundé) Intersyndicale relaunched in 2024 with support from the ASP project (ATIBT)	**UFIGA** (15 forestry and/or industrial companies) **SIAG** (6 forestry and/or industrial companies) **UFIAG** (11 forestry and/or industrial companies) **UAMEES** (25 SMEs and artisans in Libreville) **CAMMA** (20 SMEs and artisans in Franceville) **KOUMU** (18 artisans in Lastoursville and Koulamoutou) **UFIGA** serves as the permanent secretariat for the Intersyndicale	**UNICONGO** (6 forestry and industrial companies) **UNIBOIS** (15 SMEs, 6 of whom are currently active) **ACM** (approximately 100 SMEs and artisans, 15 of whom are currently active) **AMC** (500 SMEs and artisans, including 300 in Pointe Noire) **FBET** (17 SMEs and artisans	**FIB** (8 forestry and industrial companies) **ACEFA** (1,400 SMEs and artisans) Many SMEs and micro-enterprises are not members of trade unions. Enormous role and potential for the FIB and ACEFA			**SPIB** - Ivorian Union of Timber Producers SENBCI - Union of **Timber** Exporters and Traders of Côte d'Ivoire
Commitment to FLEGT	VPA signed in 2010; discussions are underway between Cameroon and the EU to terminate the VPA and replace it with the Forest Partnership. SIGIF II is currently being rolled out, and the improvement of the regulatory framework by the Cameroonian party is underway	VPA not signed National traceability system currently being rolled out Gabon has committed to a certification requirement for forestry companies starting in 2024	VPA signed in 2010 Preparation for implementation is underway SIVL (timber legality verification system) deployment is underway	VPA negotiations on Hold	VPA signed on November 28, 2011 Implementation has slowed down since 2012		**2024**: VPA signed between the EU and Côte d'Ivoire. **2028**: Target year for the agreement between the EU and Côte d'Ivoire on the FLEGT licensing scheme

[1] AO, Global Forest Resources Assessment 2020.
[2] Cameroon: MINFOF, 2021. Gabon: MEFMEPCPAT, Sept. 2020. DRC: BD FRMi.
[3] Areas with dual certification (e.g., legality+ and sustainable management) are counted once
[4] Areas with dual certification (FSC FM and PAFC/PEFC or TLV, OLB) are counted once
[5] Congo: MEF. Cameroon: MINFOF. Gabon (2021).Tableau de Bord de l'Économie [Economy Dashboard]. DRC: MEFDD. CAR: CDF
[6] BAD/FRMi (2018). *Vision stratégique et industrialisation de la filière bois en Afrique Centrale* [AfDB/FRMi (2018). Strategic Vision and Industrialization of the Timber Sector in Central Africa]. For Cameroon, DRC, and CAR: OFAC 2023.
[7] Various CIFOR reports
[8] OFAC. For CAR: CDF. For DRC: Congolese Control Office.
[9] Cameroon: MINFOF 2021. Gabon and Congo: CTWPDA data 2018. Note that Equatorial Guinea's log exports to China totaled 1,114,700 m³ in 2018.
[10] *État du secteur forêt-bois en RCA (2021)* [Status of the Forestry and Timber Sector in the CAR]: https://flegtvpa-facility.org/wp-content/uploads/2022/07/Rapport-Etat-du-secteur-foret-bois-en-Republique-Centrafricaine-2021.pdf
[11] OFAC data. For the CAR: CIFOR et al. (2021) *État du secteur forêt-bois en RCA* [Status of the Forestry and Timber Sector in the CAR]
[12] OFAC data (MINFOF, *Annuaire statistique* 2021 [Statistical Yearbook] for Cameroon). For some countries, data is limited to primary processing companies
[13] OFAC data
[14] OFAC data – CAR: CDF
[15] CTWPDA 2018 data
[16] *État du secteur forêt-bois en RCA* (2021) [Status of the Forestry and Timber Sector in the CAR]
[17] Various CIFOR reports
[18] *Rapport d'activité annuel 2022 Tracer Nkok* [2022 Annual Activity Report: Tracer Nkok]
[19] AfDB, 2018
[20] *Tableau de bord de l'Économie 2019, Ministère de l'Économie et de la Relance* [2019 Economic Dashboard, Ministry of Economy and Recovery]
[21] Source: FIB
[22] CIFOR (2014) *Le marché domestique du sciage artisanal en RCA* [The Domestic Market for Artisanal Lumber in the Central African Republic]
[23] CIFOR, 2011
[24] Nguinguiri et al., 2006

3.2 CERTIFICATION DATA

Pays	Cameroun		Congo		Gabon		RDC		Bassin du Congo		Côte d'Ivoire	
Type de Certification	Surface (ha)	Nb certificat	Surface (ha)	Nb certificat	Surface (ha)	Nb certificat	Surface (ha)	Nb certificat	Surface (ha)	Nb certificat	Surface (ha)	Nb certificat
Gestion durable												
FSC FM	695 096	2	3 081 698	5	2 497 734	8	0	0	6 274 528	15	0	0
PAFC BC	149 079	1	1 159 643	1	1 022 746	3	0	0	2 331 468	5	0	0
Gestion Durable*	**844 175**	**3**	**3 081 698**	**6**	**2 923 658**	**11**	**0**	**0**	**6 849 531**	**20**	**0**	**0**
Certification légalité												
OLB	2 565 852	10	929 561	2	636 593	2	0	0	4 132 006	14	1 129 506	3
LS	0	0	0	0	128 000	1	263 637	1	391 637	2	0	0
TLV	0	0	1 159 643	1	329 930	2	0	0	1 489 573	3	643 449	1
Légalité*	**2 565 852**	**10**	**2 675 534**	**3**	**1 456 166**	**5**	**263 637**	**1**	**6 961 189**	**19**	**1 772 955**	**4**
Autre certification												
FSC CW	0	0	0	0	613 513	4	0	0	613 513	4	0	0
Total global*, **	**2 919 240**	**13**	**4 597 589**	**9**	**4 123 141**	**20**	**263 637**	**1**	**11 903 607**	**43**	**1 772 955**	**4**
Total avec FSC CW	*2 919 240*	*13*	*4 597 589*	*9*	*4 735 654*	*24*	*263 637*	*1*	*12 517 120*	*47*	*1 772 955*	*4*



Sources :
FSC: FSC certificate database - https://search.fsc.org/fr
PAFC: PEFC certificate database - https://pefc.org/find-certified and PAFC Certification Office
OLB : Bureau Veritas Douala
TLV: Control Union
PBN: PBN certification database - https://cs.preferredbynature.org/s/

3.3 TROPICAL TIMBER MARKETS IN THE WORLD

This analysis, commissioned from Stichting Probos, is based on the monthly reports of the Global Timber Index (GTI), which is a trusted indicator. It also draws on trade data from the Sustainable Timber Information Exchange (STIX), ITTO market reports, and the Probos Thémis timber market survey. Trade data were extracted at the HS8/CN level for the main tropical hardwood product groups: logs, sawnwood, plywood, and veneer. FAO/ITTO conversion factors were applied to harmonize volumes in cubic meters (m^3).

Price trends are presented qualitatively (increase, stability, decrease) due to the heterogeneity of the products, species, and grades traded. For European markets, STIX data allow for a more reliable indicative assessment. For China and the United States, the analysis relies more heavily on supplementary sources.

The GTI is a monthly business confidence index covering ten pilot countries (Indonesia, Malaysia, Thailand, Gabon, Congo-Brazzaville, Ghana, Brazil, Mexico, Ecuador, and China). It includes indicators such as harvesting volumes, production, new orders, export orders, and inventory levels. An index above 50% indicates overall expansion in the timber sector; an index below 50% indicates contraction.

Global Market Trends in 2025

The global tropical timber market in 2025 was marked by a persistent divergence among producing regions, within a complex trade environment: U.S. tariff measures, adjustments related to the EUDR and CITES, and changing demand patterns in major markets. The GTI recorded a general downward trend in most producing countries throughout the year.

MAJOR PRODUCTION REGIONS IN 2025

Southeast Asia

Market conditions remained sluggish. Malaysia fluctuated between 20% and 30% on the GTI, well below the 50% threshold for more than 30 consecutive months, due to structural constraints and U.S. tariffs. Indonesia, which was recently added to the GTI, posted a moderate contraction at the end of the year (46.3% in December).

Central and West Africa

Gabon and the Republic of the Congo followed contrasting trajectories. The Congo remained in contraction for most of the year, while Gabon exceeded the 50% threshold starting in August. Ghana stood out with sustained growth and officially began exporting timber under a FLEGT license to the EU on October 8, 2025.

Latin America

Brazil remained in contraction (32.8% in April), adopting a wait-and-see approach in response to U.S. tariffs. Mexico maintained results close to the threshold, supported by domestic demand.

IMPACT OF U.S. TARIFF POLICIES

The United States imposed new tariffs in 2025: 24% on Malaysian products and 10% on Brazilian goods. Companies widely reported suspended purchases and canceled orders. 75% of Chinese respondents to the GTI survey indicated their intention to scale back their operations in the United States and diversify into other markets.

MAJOR IMPORTING REGIONS IN 2025

China

Chinese demand remained exceptionally weak in 2025. Imports of tropical logs fell to 5.063 million m³, that is a 27% decline compared to 2024, and the value of imports dropped by 30%. The average CIF price fell to 218 USD/m³ (approximately -15%), reflecting moderate construction activity and high inventory levels. This contraction led to a shift in demand toward Europe, as several African exporters redirected their volumes.

United States

Imports of tropical sawn timber increased by approximately 6% compared to 2024. Imports of veneers and plywood rose more sharply (+20% and +23%, respectively), while furniture imports fell sharply. These trends reflect substitution effects linked to tariffs rather than underlying strength in demand.

European Market

The European market showed signs of a cautious recovery. European imports of primary tropical wood products (logs, plywood, sawn timber, veneer) increased by 1% in volume, reaching approximately 1.33 million m³. Log imports recorded the largest relative increase (+16%), sawn timber remained stable (0%), plywood increased (+9%), and veneer declined (-4%).

Structural factors continued to weigh on the market: a struggling construction sector in most countries, persistent economic uncertainty, regulatory pressure related to the EUDR, and disruptions caused by CITES, notably a ten-month blockage on imports of padauk from Gabon.

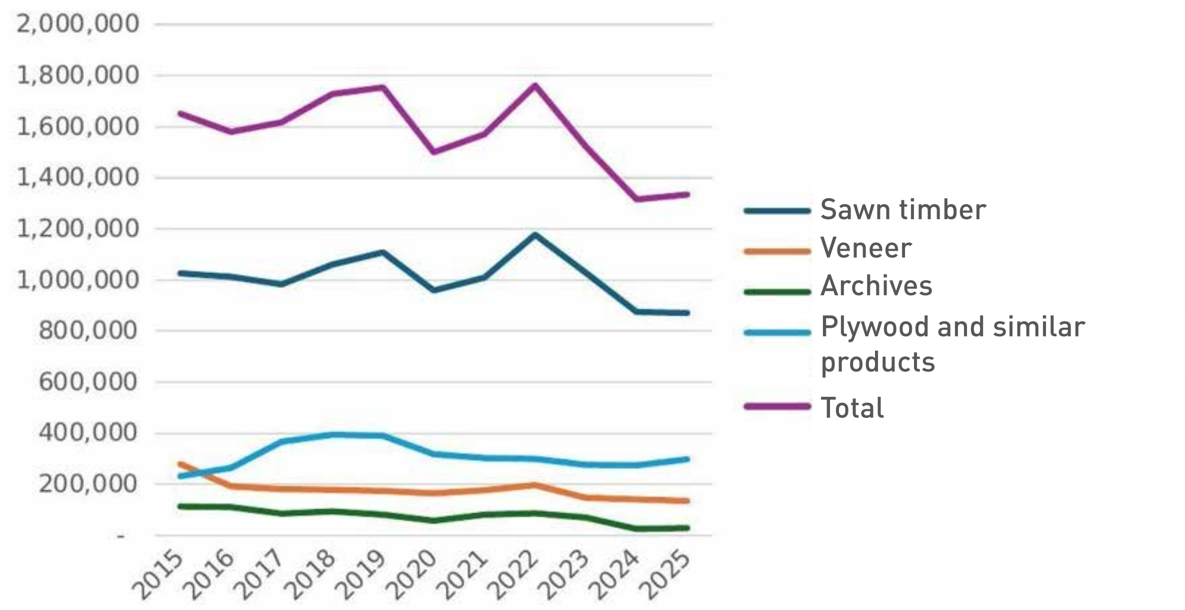


Figure 1. *European imports (in m³) of tropical hardwood (logs, plywood, sawn timber, and veneer). Source: Sustainable Timber Information Exchange, published by Probos.*

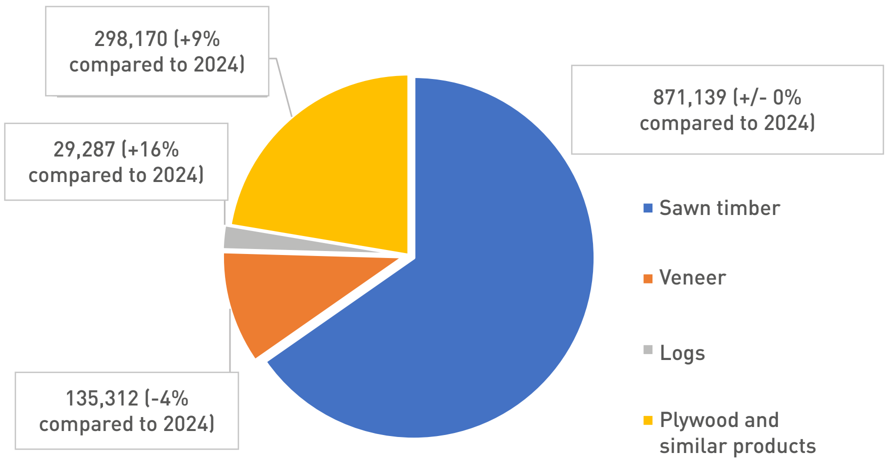


Figure 2. *European imports (in m³) of tropical hardwood by product group. Source: Sustainable Timber Information Exchange, published by Probos.*

PRICE TRENDS IN THE EUROPEAN MARKET

Product Group	2024–2025 Trend
Logs	Slight decline
Sawn timber	Stable
Plywood and similar products	Slight decline
Veneer	Slight increase

Price trends varied by product group: Veneer stood out with rising prices, driven by reduced supply of high-quality species and sustained demand for decorative veneer. Sawn timber remained stable, in line with the weakness in the construction sector. Prices for logs and plywood both declined.

Source: Sustainable Timber Information Exchange, published by Probos.

Belgium

Log imports declined, continuing the trend of recent years. Sawn timber and plywood remained stable. Antwerp remains the main European hub for tropical timber. The share of tropical timber certified as sustainable stands at approximately 32%, and that of tropical plywood at 80% (Thémis survey, 2023).

Netherlands

Log imports continued to decline. Tropical sawn timber saw a marked recovery, potentially linked to the gradual improvement in the construction sector. Veneer and plywood imports declined slightly. The share of certified products reached 77% for tropical timber and 97% for tropical plywood (Thémis survey, 2024).

France

Tropical log imports increased significantly, partly due to the restocking of French plywood producers' inventories and improved logistics in Gabon. Sawn timber remained stable, masking a shift in supply from Cameroon and the Congo to Gabon. Plywood imports declined, in contrast to the European trend, due to the persistent weakness of the French construction sector.

Note: Le Commerce du Bois (LCB) merged with the UICB in December 2025 to form the UIC-CB (Union des Industries de la Construction et du Commerce du Bois). The share of certified tropical timber stands at approximately 48%, and that of tropical plywood at 93% (Thémis survey, 2024).

Italy

Log imports rebounded after a sharp decline in 2023–2024, though they did not return to 2023 levels. Sawn timber declined slightly. Veneers and plywood remained stable, supported by the resilience of the Italian furniture industry (+1.3% in 2025).

Germany

Imports of logs and sawn timber both declined, directly linked to the weakness of the construction sector (high financing costs, decline in building permits). Veneers and plywood increased slightly, driven by a shift toward high-end furniture segments.

Spain

Log imports returned to their 2022 levels. Sawn timber imports declined significantly despite a favorable construction environment, reflecting a shift toward softwood and local species. Imports of veneers, plywood, and similar products all increased.

Denmark

A niche market for tropical timber: logs and plywood fell sharply, while sawn timber rose significantly. The marked fluctuations reflect the small size of the market, where modest changes in demand lead to significant shifts in volume. The overall share of certified sustainable timber stands at 97% (Thémis survey, 2024).

SUSTAINABLY CERTIFIED SUPPLY

The share of certified sustainable tropical timber is a key indicator of supply chain transparency. According to the 2024 Probos Thémis survey, which aggregates the purchases of members from five European federations (NTTA and NBVT in the Netherlands, UICCB in France, DTTF in Denmark, and ATIBT), 63% of tropical hardwood imports were certified as sustainable (FSC/PEFC) in 2024. Tropical wood-based panels showed a significantly higher rate, at 96%. The main reported countries of origin were Cameroon, Gabon, and Congo-Brazzaville.

Pays	Certified tropical wood (FSC/PEFC)	Certified tropical plywood	Certified wood, all categories
Belgium	~32% (2023)	~80% (2023)	~72%
Netherlands	~77% (2024)	~97% (2024)	~94%
France	~48% (2024)	93% (2024)	>91%
Denmark	73% (2024)	100% (2024)	97%
EU (Thémis aggregate)	63% (2024)	96% (2024)	92.6%

The European tropical timber market experienced a slight recovery in 2025, but gains remain fragile and unevenly distributed. Weakness in the construction sector continues to weigh on most importing countries. The sharp rise in plywood imports reflects a shift in trade flows (anti-dumping duties on Chinese plywood) rather than underlying growth in demand. The sustainability of the recovery will depend on the pace of the construction sector's recovery and the final implementation of the EUDR, whose definitive timeline has yet to be confirmed.

Sources: Global Timber Index (ITTO) —www.itto.int/gti | Sustainable Timber Information Exchange — www.stix.global | Thémis Probos Survey — tinyurl.com/e4xt8tjt | ITTO MIS (various issues, 2025)

4

A LOOK BACK AT THE MAJOR CHALLENGES OF 2025

4.1 EUDR – A PIVOTAL YEAR

The year 2025 marked a major milestone in the implementation of the European Regulation on Deforestation-free products (EUDR). Initially viewed as a preparatory year ahead of the regulation's entry into force, it gradually evolved into a period of intense debate over implementation methods, the feasibility of the obligations, and the economic implications for supply chains.

For the tropical timber sectors, the stakes were particularly high. Companies committed to sustainable forest management, certification, and traceability found themselves facing new requirements while seeking to maintain their access to the European market. In this context, ATIBT pursued a twofold objective: to help stakeholders understand the regulation and to ensure that the realities of the tropical timber sectors were heard in European discussions.

Informing and Supporting Stakeholders

Throughout the year, ATIBT continued its efforts to raise awareness and provide support to its members, economic operators, and government agencies in producing countries.

The association organized or co-organized several technical webinars, information sessions, and workshops focused on the implications of the EUDR for the tropical timber sectors. Presentations were also given at international events such as Trade and Markets Day in Costa Rica, the Tropical Forestry Forum in Cologne, and the Global Legal and Sustainable Timber Forum in Macau, helping to disseminate up-to-date information on the regulation's requirements and their implications for tropical producers.

ATIBT has also developed and distributed several educational materials for companies, including explanatory brochures on the EUDR and on how certification contributes to regulatory compliance. In Côte d'Ivoire, the national workshop organized as part of the PASSAD project brought together government agencies, companies, and technical partners to identify the main implementation challenges facing the forestry and timber sector.

Amplifying the Voice of Tropical Sectors in the European Debate

The year 2025 also marked a significant expansion of ATIBT's representative and advocacy role.

Amid growing debate over a further postponement or a reopening of the regulation, ATIBT has maintained a consistent position: to preserve the objectives of the EU Deforestation Regulation (EUDR) while ensuring that its implementation is compatible with the realities of tropical forest supply chains.

The association has stepped up its dialogue with the European Commission, the relevant authorities in the member states, the permanent representations, Members of the European Parliament, and the relevant professional organizations. In particular, it reiterated that tropical forest concessions committed to sustainable management, certification, and traceability should be recognized as part of the solution to combating deforestation, rather than as an additional risk factor.

This position led ATIBT to become actively involved in a cross-sector coalition bringing together companies, trade associations and federations, and civil society organizations from the timber, cocoa, coffee, rubber, and agri-food sectors. Alongside stakeholders such as Nestlé, Ferrero, Mars, Olam Agri, Rainforest Alliance, and VOICE Network, ATIBT has contributed to the development of common positions, the drafting of letters addressed to the European Commission, the European Parliament, and the Council, as well as several awareness-raising initiatives targeting European decision-makers.

In particular, the association, along with some of its members, participated in a meeting with the office of the President of the European Commission, engaged in discussions with DG Environment, and took part in several initiatives organized at the European Parliament, notably at the invitation of MEP Pascal Canfin.

A Balanced Position in a Polarized Context

The year was marked by a growing polarization of positions. Some stakeholders called for a further postponement or a reopening of the text, while others advocated for an immediate implementation without adjustments.

In this context, ATIBT advocated a compromise approach based on three principles: maintaining the regulation's environmental ambition, avoiding any questioning that could create a new period of uncertainty, and promoting a phased implementation that takes into account on-the-ground realities.

The association also emphasized the need to recognize the efforts already made by operators committed to sustainable forest management, certification, and traceability systems. This approach helped raise the visibility of issues specific to tropical timber sectors in a debate often dominated by the concerns of European stakeholders.

At the end of this particularly eventful year, ATIBT has established itself as a recognized partner on issues related to the EUDR, capable of serving as a bridge between producers in tropical countries, European operators, and the institutions responsible for implementing the regulation.

HIGHLIGHTS 2025

Strengthened support for the supply chain
Webinars, technical workshops, information meetings and international interventions to raise awareness and support stakeholders in meeting EUDR requirements.

Practical tools for businesses
Publication of brochures and guidance on the EUDR and on the contribution of certification to regulatory compliance.

Strengthened presence on the international stage
Interventions at Trade and Markets Day (Costa Rica), at the Tropical Forestry Forum (Cologne) and at the Global Legal and Sustainable Timber Forum (Macao).

ATIBT integrated into a European coalition
Participation in an intersectoral coalition bringing together businesses, professional federations and civil society organizations from the forestry, wood, rubber and agri-food sectors.

Direct dialogue with European institutions
Meetings with the European Commission, national authorities of Member States, Members of the European Parliament and the Cabinet of the President of the Commission.

Promoting committed tropical supply chains
Advocacy for a stable regulatory framework that recognizes the efforts of certified and committed tropical supply chains in the fight against deforestation.

4.2 CITES – 2025 REVIEW

The year 2025 was eventful on the CITES front for Central African timber species. It centered on four key areas:

- regional methodological consolidation on non-detriment findings (NDFs),
- concrete advocacy efforts regarding the blocking of permits toward the European Union,
- collaborative preparation for **CoP20 in Samarkand**,
- reporting the results back to members.

The progress made is accompanied by persistent obstacles that directly impact the competitiveness of African operators.

Developments and Decisions

Several substantial advances have been made at the regional level and at the Conference of the Parties.

- Adoption of a **common framework for drafting NDFs** and recognition of the NDF as the central document for managing Appendix II species, during the regional workshop in Douala (March).
- Dissemination of the common regional framework via **CITES Notification 2025/056** (April), led by COMIFAC.
- At CoP20, adoption of an **amendment to Resolution Conf. 12.3 (Rev. CoP19)** and of a decision requiring importing Parties to provide written justification for any permit denial (**Doc. 48** sponsored by Cameroon on behalf of Central Africa).
- Coordination of regional responses to EU consultations on **Okoumé** and ***Entandrophragma*** spp. The EU ultimately decided not to submit these proposals to CoP20; vigilance remains high in anticipation of CoP21.
- Reporting of CoP20 results to members, trade associations and unions via the **ATIBT webinar** "CITES: 2025 Review and 2026 Outlook" (December).

Implementation Challenges

The **timeframes for issuing CITES import permits to the EU** remain highly inconsistent across Member States and constitute the main operational obstacle for African exporters.

- Up to **26 months in Belgium**, more than **30 months** for certain multi-country cases, compared to about 4 months in France and less than a month in Spain, depending on the case (ATIBT briefing note released in the Autumn of 2025).
- Onerous documentation requirements imposed by European scientific authorities (scale of UFA – forest management unit –, minimum density, regeneration index ≥ 50%), with a trend toward stricter implicit thresholds of 75% to 100%, without an explicit regulatory basis.
- Uneven mobilization among countries in the subregion; strengthening support for the Congo's national NDFs is a priority.

Tensions and Obstacles

- Persistent **significant disagreements with the European Commission** regarding thresholds, the transparency of the process, and the consideration of regional scientific advice, as confirmed at the EU Forestry Expert Meeting in September.
- Rejection at CoP20 of the proposals to delist the Central African populations of ***Afzelia bipindensis*** (Prop. 49/56/24) and ***Pterocarpus soyauxii*** (Prop. 51/57/20) from Appendix II. With approximately 47% of votes in favor, regional credibility has clearly grown, but the fragility of coalitions outside the subregion has been confirmed.
- Regarding **Doc. 48**, the proposal for a mandatory 30-day deadline for processing permits was not adopted; the adopted compromise focuses on providing

written justification for denials, a partial but tangible step forward.
- Regarding **Doc. 102** (look-alike criterion), there was greater alignment with several forestry and Latin American countries, but the final outcome fell short of regional expectations.

Impacts on the sector

The **ATIBT briefing note** sent to the EU Delegations (Yaoundé, Libreville, Brazzaville) at the end of the year documents the concrete effects of permit delays on operators.
- Blockage of the bulk of the volumes in question, significant revenue losses, cash flow pressures, layoffs, and slowdowns in operations.
- Direct impact on local development funds supported by forestry operations and on the communities that depend on them.

The decision adopted at CoP20 requiring written justification for permit denials represents a concrete step toward greater predictability for operators. The advocacy effort drew on the mobilization of importers' associations, Members of the European Parliament, and specialized media outlets.

Regional Coordination and Support for Delegations

Throughout the year, ATIBT provided coordination and sustained technical support at every key stage of the CITES calendar, working closely with COMIFAC and the lead countries.
- **January** — COMIFAC meeting in Douala: preparation for the NDF regional workshop, progress update on the framework, ecological summaries, and calculation tools.
- **February** — Support for SC78 in Geneva: reformulation of talking points, distribution of intervention matrices, and support for subregional coordination.
- **May** — Brazzaville workshop (SGTAPFS-18 COMIFAC): formalization of regional proposals on *Pterocarpus soyauxii* and *Afzelia* spp., designation of lead countries, and lobbying strategy.
- **June** — Report of Working Group: organization of the preparation of CoP20 proposals (Prop. 45, Prop. 47, Doc. 48), task allocation, and reverse scheduling.
- **April and November** — Meetings of the ATIBT Forest-Industry Committee: monitoring the harmonization of NDFs, quotas, and blocked permits for Padauk; final alignment of messages ahead of Samarkand.

4.3 OVERVIEW AND DEVELOPMENTS IN FOREST CERTIFICATIONS

FSC: Exceptional Engagement by ATIBT at the 2025 General Assembly

The year 2025 was marked by ATIBT's particularly strong involvement in the work of the Forest Stewardship Council (FSC), culminating in the General Assembly held in Panama from October 27 to 31, 2025, which brought together more than 600 participants from around the world.

ATIBT was represented there by Caroline Duhesme and Nathalie Bouville, with a clear objective: to defend the interests of certified tropical forests, promote sustainable forest management as a tool for conservation and development, and actively contribute to discussions on the future of the FSC system.

During the General Assembly's voting sessions, ATIBT carried out significant advocacy work on several strategic motions. In particular, it actively supported Motions 26 (audit quality), 34 (FSC as a tool for regulatory compliance), and 48 (landscape approach), while also backing other major texts, notably Motions 45 and 30.

Motion 45, adopted by FSC members, represents a significant evolution of the FSC's approach to Intact Forest Landscapes (IFLs). This motion aims to move beyond approaches based exclusively on fixed protection thresholds toward an approach more grounded in conservation outcomes, the maintenance of ecological integrity, and consideration of sociocultural values. This direction aligns with many positions advocated by ATIBT for several years in discussions on IFLs, since the adoption of Motion 23 in 2022 (a landscape-based approach to the management and protection of IFLs).

Beyond the statutory debates, ATIBT played a particularly prominent role by organizing, together with the Rainforest Alliance, two major side events.

The first, titled "**30 Years of FSC Certification in Natural Tropical Forests: A Review of Achievements and Prospects for the Future**," brought together nearly one hundred participants. This session provided an opportunity to take stock of thirty years of FSC certification in natural tropical forests and to highlight the major contributions of sustainable forest management to the conservation of the Congo Basin's forests. Several leading speakers from academia, forestry companies, NGOs, and the FSC participated in the discussions. These discussions notably highlighted the need for FSC tools to better account for tropical realities, as well as the importance of maintaining a credible, pragmatic, and economically viable certification system for forestry operators.

The second event, "**Tropical Timber Markets and Value Chains: Lessons Learned and Prospects for Responsible Forestry**," focused on the future of certified tropical timber markets and the conditions necessary for the economic viability of responsible forest management. This session brought together several high-level figures, including Ms. Rosalie Matondo, Minister of Forest Economy of the Republic of the Congo; FSC Executive Director Subhra Bhattacharjee; and representatives from industry, the WWF, the Rainforest Alliance, and European markets. The discussions highlighted the need to better promote the efforts of certified companies, to strengthen the links between FSC certification and regulatory requirements such as the EU Deforestation Regulation (EUDR), and to create greater economic value for products sourced from sustainably managed tropical forests.

Throughout the General Assembly, ATIBT also participated in technical discussions regarding the implementation of the EUDR, ecosystem services, evolving FSC conservation requirements, and mechanisms to improve the recognition of certified tropical timber on international markets.

Through its involvement in motions, its advocacy work with FSC members, and the organization of these key events, ATIBT has helped amplify the voice of certified tropical forests at the highest level of FSC governance and has raised the visibility of issues affecting the Congo Basin in international discussions on the future of forest certification.

Rollout of the PAFC Congo Basin certification

The development of the PAFC Congo Basin certification system reached a new milestone in 2025, confirming the soundness of the strategic choice made several years ago by ATIBT and its partners. After actively contributing to the creation of the regional framework, the development of standards, their recognition by PEFC International, and the initial phases of implementation, ATIBT continued its commitment to consolidating this certification system, which is tailored to the realities of the Congo Basin's tropical forests.

The year was notably marked by the strengthening of regional governance of the system, with the appointment of a regional coordinator (Lucas Millet) and the opening of an office in Libreville. This permanent presence on the ground now enables closer support for forestry companies, national PAFC structures, and forestry administrations in the various countries of the region. It also helps increase the system's visibility among economic and institutional stakeholders.

The momentum of certification continued throughout the year. According to data available at the end of 2025, the Congo Basin PAFC now covers more than 4 million hectares of certified forests in Cameroon, Gabon, and the Republic of the Congo, making it one of the leading forest certification systems operating in the region. This growth reflects companies' growing interest in a regional standard recognized by PEFC International and tailored to the forestry, social, and regulatory contexts of the Congo Basin.

At the same time, the system has continued to strengthen technically. Several support tools for companies and auditors have been developed or enhanced to facilitate the interpretation and implementation of the standard's requirements. These tools include, in particular, technical guides, tools for calculating greenhouse gas emissions, mapping matrices between certification standards, and various resources to facilitate conformity assessment and the continuous improvement of forest management systems.

Finally, several strategic initiatives have been launched to prepare for the geographic expansion of the system to other countries in the Congo Basin and to strengthen its integration into national forestry policies.

These developments reflect the gradual maturation of the Congo Basin PAFC certification system, which is now establishing itself as a credible tool for sustainable forest management, traceability of forest products, and access to international markets. For ATIBT, the development of the PAFC serves as a complementary lever to other certification initiatives promoted in the region and contributes to the broader objective of promoting tropical timber from sustainably managed forests.

Through 2026, ATIBT will continue to support the development of the Congo Basin PAFC as part of the Tropical Timber Trade Facility (TTT) project, funded by GIZ. The planned actions will focus in particular on strengthening the capacities of industry stakeholders through the establishment of a regional trainer accreditation system, the development of harmonized training programs for PAFC auditors and trainers, and providing guidance to companies seeking certification in sustainable forest management and chain of custody. These activities will help consolidate the technical expertise available in the region and support the continued expansion of the PAFC system in the Congo Basin.

Trends in Certifications in the Congo Basin

See the table of certification data in Section 3.2.

Overall Trends

Between December 31, 2024, and June 12, 2026, certified areas in the Congo Basin increased significantly, rising from 11.9 to 13.4 million hectares (+12%). This growth is primarily driven by sustainable management certifications, whose areas increased by 18%, thanks in particular to the expansion of the PAFC Congo Basin program, which has more than doubled in a year and a half. The FSC FM certification also continues to grow and remains the leading sustainable management certification system with more than 6.8 million hectares certified.

Congo has now established itself as the leading certified country in the subregion with more than 5.3 million hectares certified, ahead of Gabon. Legality certifications also continued to expand, reaching 8 million hectares, supported by the growth of the OLB and the emergence of PBN certification. Conversely, the FSC CW certificates recorded at the end of 2024 were no longer included in the scope by 2026. Overall, these results demonstrate that a positive trend in certification is continuing in the Congo Basin, both in terms of sustainable management and the verification of the legality of forestry operations.

Growth in FSC-Certified Areas in the Congo Basin

The FSC momentum in the Congo Basin continued in 2025 with significant results. The certification of Rougier's Mokabi-Dzanga concession in the Congo (586,000 ha) brought the total area of the group's FSC-certified concessions to nearly 1.5 million hectares. Congo now has over 3.6 million hectares certified under FSC, and the Congo Basin is approaching 7 million hectares. These figures confirm a fundamental structural shift, even though significant disparities remain between countries.

FSC Certification of Protected Areas in Gabon: A New Frontier

In 2025, FSC Congo Basin entered into a strategic partnership with Gabon's National Agency for National Parks (ANPN) to explore the certification of 13 protected areas. An action plan was approved in December in Libreville. This initiative marks an expansion of the scope of certification beyond industrial forest concessions, with potential implications for the valuation of environmental services and access to carbon and biodiversity financing.

PAFC Dynamics: Exceptional Growth in Certified Areas

The PAFC Congo Basin program experienced unprecedented growth in 2025, with the area certified for sustainable forest management increasing 2.1-fold in one year. The companies newly certified under PAFC are FTC (Gabon), and SEFECCAM and SEFAC (Cameroon).

The breakdown by country reflects a particularly marked increase in the Congo, where PAFC-certified areas total 3.3 million hectares, while Cameroon has seen spectacular growth since its first certification in 2024.

Trends in Legality Certifications

Legality certifications have also undergone several notable changes during this period. OLB certification continues to grow, with a significant increase in certified areas. This growth is driven both by the renewal of expired certificates and by the entry of new companies into the system. Furthermore, OLB has strengthened its standards to incorporate the requirements of the European Deforestation Regulation (EUDR), thereby enhancing its relevance for operators focused on European markets.

As for Preferred by Nature (PBN), the announced transition from LegalSource (LS) certifications to the new PBN Certification scheme is now complete. The last LS certificates have been phased out, and the first PBN certificates are appearing in regional statistics, marking an important milestone in the evolution of this legality certification offering.

Finally, Control Union's TLV (Timber Legality Verification) certification remains stable. No major changes are to be reported regarding the standard (which has already been updated to comply with the EUDR) or its rollout in the region during the period under review.

HIGHLIGHTS 2025

13,3 million hectares certified in the Congo Basin

All recognized certifications, certified areas have increased by 12% since 2024, confirming the positive momentum of the sector.

PAFC doubles its certified area

PAFC certified areas have increased from 2.3 to 4.9 million hectares thanks to new certifications in Cameroon and Congo.

6,8 million hectares certified FSC FM

FSC remains the leading benchmark for sustainable forest management in the Congo Basin.

8 million hectares covered by legality certifications

Progress of OLB and the arrival of the first PBN certificates strengthen the supply of legality verification in the region.

5.3 million hectares certified in Congo

Congo surpasses the milestone of 5 million certified hectares and consolidates its central position in the region's certified forest landscape.

Towards certification of protected areas

FSC Congo Basin and ANPN have launched a collaboration to explore the application of FSC certification in 13 national parks in Gabon.

** Without double counting of certified areas under several certification systems.*

4.4 CLIMATE AND BIODIVERSITY FINANCING

Innovative Financing, Carbon, and Biodiversity: Developing New Leverage for Sustainable Management

The sustainable management of tropical forests generates significant environmental benefits: maintaining forest cover, carbon storage, preserving biodiversity, protecting forest landscapes, and contributing to local development. However, these ecosystem services are still undervalued economically.

In a context where the costs of sustainable management and certification are rising while tropical timber markets remain under pressure, ATIBT is closely monitoring the emergence of new financing mechanisms related to carbon, biodiversity, and payments for environmental services (PES). The goal is not to replace the timber economy with these mechanisms, but to identify complementary sources of revenue that could strengthen the economic viability of concessions committed to sustainable management.

This discussion is taking place within the Carbon & Biodiversity Committee (CC&B), established in 2022 and led by TEREA. The committee is now ATIBT's primary forum for monitoring developments in carbon and biodiversity markets, analyze opportunities for forestry companies, and contribute to international debates on conservation financing mechanisms.

2025: A Year Marked by High Activity for the Carbon & Biodiversity Committee

Informing and Supporting Members

In 2025, the committee continued its monitoring and outreach efforts to ATIBT members through four specialized newsletters focused on carbon and biodiversity markets, nature-based solutions, and innovative financing. Topics covered included payments for environmental services in Central Africa, the follow-up to CoP16 on Biodiversity, voluntary carbon markets, European nature credits, climate philanthropy, Article 6 of the Paris Agreement, the Tropical Forest Forever Facility (TFFF), and new technologies for measuring forest carbon.

This briefing enabled members to better understand the rapid changes in methodological, regulatory, and financial frameworks, while identifying the opportunities and risks associated with these new mechanisms.

Giving Tropical Forests a Voice in the OBC's Work

One of the year's main initiatives involved the Organization for Biodiversity Certificates (OBC), an international initiative aimed at developing a robust system of biodiversity certificates.

As a member of the OBC Board of Directors and the "Markets" and "Tropical Forests" working groups, ATIBT coordinated the working group dedicated to tropical forests in 2025 to ensure that the realities of forest concessions in the Congo Basin are taken into account in the development of future methodologies.

This work led to the development of an initial framework of biodiversity-friendly practices tailored to tropical production forests, distinguishing in particular between actions related to conservation and those pertaining to the sustainable management of forests.

This approach aims to establish a framework for recognizing and, ultimately, compensating forest managers for their efforts to promote biodiversity.

Beyond the methodological challenge, ATIBT's involvement in the OBC aims to ensure that future biodiversity certification mechanisms are compatible with the operational realities of certified concessions and that they can serve as a credible source of additional financing for companies committed to sustainable management.

Bringing Tropical Forest Issues to COP30

COP30 in Belém was another highlight of the year.

With ATIBT's support, the Carbon & Biodiversity Committee participated in international discussions to highlight the essential role of sustainably managed forest concessions in conserving large tropical forest areas and in achieving climate and biodiversity goals.

The committee helped organize three side events focused on nature-based solutions, biodiversity certificates, and innovative financing mechanisms. These events highlighted the environmental, social, and economic co-benefits of certified sustainable forest management, as well as the challenges facing the concession model in the Congo Basin.

Outlook

After several years devoted to monitoring, raising awareness, and developing methodological tools, ATIBT now wishes to take the next step.

The work underway on biodiversity certificates, payments for environmental services, and other innovative financing mechanisms should gradually lead to concrete pilot projects in the forest concessions of the Congo Basin.

This ambition is reflected in particular by the development of a project submitted to the FFEM, which plans to test IFM (Improved Forest Management) methodologies for generating carbon credits, and the OBC's approach to generating biodiversity certificates in tropical forest concessions in Cameroon, as well as through the proposal submitted in response to CAFI's PES Call for Expressions of Interest, which aims to recognize the role of certified forest concessions as providers of environmental services and aggregators of community initiatives.

The objective for the coming years is clear: to gradually transition from an exploration and design phase to a demonstration and pilot phase, in order to assess the actual capacity of these mechanisms to generate additional revenue and strengthen the economic sustainability of tropical forest management.

TEMPS FORTS 2025

4 specialized newsletters covering carbon and biodiversity markets, PES, Article 6 of the Paris Agreement, the Tropical Forest Forever Facility (TFFF), nature credits, and international regulatory developments.

ATIBT's leadership within the OBC with the coordination of the "Tropical Forests" working group of the Organization for Biodiversity Certificates.

First biodiversity framework for tropical forests developed to identify and promote conservation and sustainable management practices that support biodiversity in forest concessions.

Participation in COP30 in Belém and organization of three side events focused on nature-based solutions, biodiversity certificates, and sustainable financing for tropical forests.

Contribution to discussions on PES and mechanisms for payment for ecosystem services provided by certified forest concessions.

Preparing for the transition to the pilot phase through discussions underway in the FFEM project and CAFI's PES Call for Expressions of Interest (CEI).

4.5 STRUCTURE AND STATUS OF THE SECTOR

Forest Production and Industrial Processing

The Congo Basin accounts for approximately 1% of global log production, 5% of tropical logs, and 6% of tropical sawn timber — a modest contribution given the vast size of the forest, which covers more than 200 million hectares. This reality reflects both considerable potential and a forestry economy under constant pressure.

The sector is organized around two distinct segments: a formal, export-oriented industry dominated by foreign-owned companies operating under managed concessions, and an artisanal sector supplying domestic markets, which is largely informal and poorly structured. In Cameroon, the informal sector accounts for 70% of the domestic market and sets prices. In Congo, the margin on the open sale of sawn timber is estimated at about 3%, a sign of a sector under constant economic strain.

Local processing remains a public policy objective in all producing countries. Gabon is the most advanced in this regard, with a ban on log exports and the development of the Nkok Special Economic Zone (SEZ). While industrial capacity has increased, corporate profitability is nevertheless eroding due to logistics costs and growing administrative complexity. Diversification toward lesser-known timber species (LKTS) is progressing slowly, hampered by the popularity of traditional species (Ayous, Sapelli), which account for nearly one-third of Cameroon's exports. Gabon is also entering a new structural phase with the second forest rotation, involving a more dispersed resource base and higher operating costs.

Economic Constraints — Logistics, Costs, Energy

The cost structure of formal forestry companies is characterized by the burden of taxation and logistics. In Cameroon, for certified companies, forestry taxes account for an average of 34% of the FOB price of logs, transportation to the port of Douala ranges from 21% and 54% depending on location, and customs duties account for 29%. SYNEFOR analyses show that certified companies structurally operate at a loss with an average FOB cost price of 205,060 FCFA/m³ compared to a selling price of 170,549 FCFA/m³.

These constraints are present to varying degrees throughout the subregion. All three countries face similar logistical challenges: inadequate port facilities, a shortage of containers, and customs inefficiencies. The cost of fuel — on which generators at off-grid factories depend — skyrocketed by 44% in Cameroon between 2022 and 2025. In the Congo, road checkpoints result in heavy parafiscal charges and informal levies that undermine the competitiveness of businesses. In Gabon, the extension of VAT credit reimbursement periods is creating major cash flow pressures for operators.

Overall Situation of Operators and Outlook

The industry has been experiencing a prolonged crisis since 2019, exacerbated by the Chinese real estate crisis. Between 2023 and 2024, the global market contracted by 11%, with declines ranging from 8% for sawn timber to 18% for logs. In 2025, no significant recovery is expected in Asia, which still accounts for between 50% and 60% of the subregion's exports. The European market, the main alternative, remains stable but demanding, with volumes of tropical sawnwood down 5% in 2025.

Faced with the decline in the Chinese market, some operators are turning to Vietnam — a substitute market with no regulatory requirements, but one that exposes the sector to the risk of future disruptions if the EUDR is extended to indirect supply chains. This short-term strategy undermines formal operators

in the long term when faced with informal competition whose costs are estimated to be 30% lower.

Certified companies, despite their considerable positive externalities for their States, do not yet enjoy a sufficient economic advantage to offset the cost differential with the non-certified sector. However, several encouraging signs emerged in 2025: a differentiated logging tax based on certification level in Cameroon; and Gabon's organization of its first Forestry Economic Forum, bringing together 170 public and private stakeholders to define a recovery roadmap, with a strong government commitment to increase the sector's contribution from 4% to 10% of the GDP. The challenge in the coming years will be to consolidate these trends before further bankruptcies of certified companies undo the progress made over the past two decades.

4.6.1 COUNTRY-SPECIFIC TRENDS - CAMEROON

1. Key Developments in 2025

- Progress in SFM certification: positive PAFC audit in December 2025, leading to an increase in the number of certified companies and the area under sustainable management — a positive sign in a challenging economic climate.

- Differentiated tax reform: The 2026 Finance Act introduces a tiered logging tax based on certification status (2.5% for SFM-certified companies, 3% for other forms of certification, 5% for non-certified companies) and a 20% reduction on export duties for logs covered by a non-deforestation compliance certificate.

- Worsening logistics crisis: Beyond transportation difficulties, a conflict between the Autonomous Port of Douala (PAD) and SGS over the scanning of companies' containers has negatively impacted exports by companies in the sector due to an initiative requiring double payment for the same service at the end of 2025.

- Persistent market slump: declining orders, stagnant or falling prices, layoffs, and business closures; a 17% drop in exports is anticipated in the first half of 2026.

- Emergence of a new association-based player: The landscape of professional associations in the sector has expanded and now includes a new representative for the timber sector in discussions with other stakeholders, despite differences on certification issues.

2. Developments in the Industry

Taxation and Regulatory Framework

Cameroon's tax rates remain the highest in the CEMAC zone. However, the 2025 reform in the 2026 Finance Act introduces an incentive-based approach through certification; yet its incentive effect cannot yet be assessed given the overall tax burden and rising ancillary costs (particularly energy and logistics). The increase in export duties on logs — from 60% to 75% in 2024 — is part of a trajectory consistent with the announced phase-out of log exports in 2028.

Certification

Despite an unfavorable economic climate, SFM certification is gaining ground. The positive outcome of a PAFC audit in November 2025 reflects a fundamental momentum driven by a core group of companies that view certification as a competitive advantage for accessing European markets and as a means of meeting EUDR requirements. The tax differentiation introduced in the 2026 Finance Act could further reinforce this competitive edge.

Markets and Competitiveness

La morosité des marchés tropicaux se The sluggishness of tropical markets is reflected in contracting demand and pressure on margins. The simultaneous rise in production costs (taxes, energy, logistics) and stagnant prices are undermining operators' profitability. The closure of dozens of companies in recent years illustrates the severity of this structural constraint.

EUDR and CITES

The EUDR remains a concern raised more by European buyers than by Cameroonian producers, although a slight easing was observed at the end of 2025. Regarding CITES, the sector — companies, government agencies, and partners — has actively mobilized against the listing of new tree species in Appendix II, as part of a subregional coordination effort.

Operational Constraints

Electricity shortages (outages lasting several hours a day) are a major obstacle to the industrial processing of timber, precisely at a time when the halt in log exports requires an increase in capacity. Logistical disruptions at the Port of Douala — including a shortage of containers, jurisdictional conflicts, and issues with customs digitization — are generating additional costs and uncontrolled delays.

3. Major Challenges

- Transition to full processing by 2028: The halt in log exports will require companies to process all harvested volumes or redirect them to domestic and regional markets. According to the 2025 economic outlook report, more than 30% of current exports will need to be redirected. Shortages in energy and logistics could well undermine this transition.

- Financial profitability under pressure: The combination of high taxes, rising production costs, and stagnant prices is reducing margins to a level that threatens the viability of many operators. The expected decline in exports in the first half of 2026 would amplify this trend.

- Promoting lesser-known timber species (LKTS): Faced with the expected decline in volumes of traditional timber species during the second rotation and regulatory pressures (CITES), developing markets for secondary timber species represents a lever for diversification. A product-based approach — rather than a species-based approach — is necessary to cross this threshold.

- Securing the Permanent Forest Domain (PFD): Pressure on the PFD's forest areas, particularly on the UFAs — mining and agro-industrial projects, encroachments — threatens the long-term supply to industries and the profitability of investments related to processing.

- Public-Private Dialogue: The lack of communication and mutual understanding between private actors and government agencies hinders the adoption of certain measures tailored to the sector's economic realities, despite the adoption of some positive measures. However, the implementation of certain decisions taken does not always follow through.

- Structuring of the domestic timber market: Progress toward the exclusive use of legal timber in public procurement remains limited, despite the government's decisions to move toward the exclusive use of legal timber for public procurement, thereby limiting the development of a strong and structured domestic market.

4. Outlook

Cameroon's timber sector is entering a period of forced structural transformation. The 2028 deadline sets a non-negotiable framework: companies that have not begun their transition toward transformation may no longer have access to the European market. SFM certification, by becoming a differentiating tax criterion and a prerequisite for the EUDR, would establish itself as a driver of competitiveness and no longer merely a voluntary initiative.

In this context, three trajectories will shape the sector's future:

- Improving the business environment: Decisive action on taxation, energy, export mechanisms, import procedures for processing equipment, and logistics is essential to make the government's ambitious transformation policy credible and achievable.

- Industrial and commercial innovation: The development of new types of products (secondary and traditional species) and the enhancement of operators' skills are the drivers of sustainable competitiveness in European and Asian markets.

- Coherence in public policy: The government must align its facilitation practices with the stated policy priorities for the sector, while companies must commit more resolutely to innovation despite the risks involved. Phase IV of the PPECF program and the new support initiatives currently being developed with technical and financial partners offer opportunities to support this transition — provided that the framework conditions improve sufficiently to make the required investments accessible and profitable.

4.6.2 COUNTRY-SPECIFIC TRENDS - REPUBLIC OF THE CONGO

1. Highlights of 2025

- Ban on log exports in effect since January 2023: The measure is forcing industrial restructuring but is hampered by shortcomings in secondary and tertiary processing, an energy deficit, and financing constraints. Exemptions have been granted to certain companies in exchange for infrastructure projects.

- New legal framework established by the 2020 Forest Code (Law No. 33-2020) and Law No. 38-2024: introduction of the principle of log production sharing, a major innovation whose implementation raises complex challenges regarding economic viability and governance.

- A structurally informal domestic market: Urban consumption of sawnwood is estimated at 150,000 m³/year (approximately 500,000 m³ of logs), representing 25–30% of national production. Two-thirds of these volumes fall outside the formal regulatory framework.

- Emerging community dynamics: Initiatives to build organizational structures (clusters, associations) and a growing need for training reflect the maturing of the artisanal sector, which remains poorly organized.

2. Developments in the Sector

Regulatory Framework and Governance

Congo has adopted an ambitious legal framework, anchored in the FLEGT VPA ratified in 2013 and reinforced by the 2020 Forest Code. The introduction of log production sharing represents a significant shift: it aims to redistribute the value of the resource, but its implementation is hampered by the fragility of the national industrial base, the lack of operational economic zones, and difficulties in establishing national price indices. The gap between political ambition and industrial capacity constitutes the main risk to implementation.

Processing and the Domestic Market

The ban on log exports forces operators to redirect their volumes toward local processing or domestic markets. However, the domestic market remains characterized by low valorization — with price differentials ranging from 30 to 100 percent depending on the species compared to export markets — and by demand driven almost exclusively by price and immediate availability. This context limits industrial stakeholders' economic interest in this segment.

Sectoral Dualism and Informality

The sector is based on a structural duality between a formal, export-oriented industrial sector and a largely informal artisanal sector that supplies the domestic market. This fragmentation hinders traceability, professionalization, and investment. The current regulatory framework covers only a limited fraction of artisanal flows, posing a systemic challenge to the legality of timber.

Operational Constraints

Operators face a range of converging constraints: a chronic energy shortage, limited access to financing, low levels of equipment and productivity, administrative and fiscal complexity, and competition from imported products in urban markets. These factors directly impact the capacity to transition toward processing.

3. Major Challenges

- Implementation of production sharing: Reconciling regulatory obligations with the economic realities of concessionaires requires careful institutional engineering. The absence of operational mechanisms (economic zones, price indices) delays the reform's effectiveness.

- Transition to processing: The ban on log exports necessitates an expansion of industrial capacity in a context marked by an energy deficit and insufficient financing. Without improvements to these framework conditions, the stated policy remains difficult to implement.

- Formalization of the domestic market: Structuring the local supply of legal timber is a prerequisite for adding value to the sector. This requires a joint effort focused on traceability, appropriate taxation, and recognition of the artisanal sector.

- Promoting lesser-known tree species: Against a backdrop of dwindling supplies of commercial tree species and regulatory pressure (EUDR, CITES), developing markets for secondary timber species represents a strategic lever for diversification.

- Capacity building: Improving the skills of artisans and wood processing professionals is a key factor in the sector's professionalization and in improving material yields.

4. Outlook

The Republic of the Congo is undertaking a structural transformation of its timber sector driven by the combined effects of ambitious legal reforms and persistent economic constraints. The central challenge is to align the pace of institutional reforms with the actual capacities of industry operators.

Three key factors will determine the success of this transition:

- Operationalizing the regulatory framework: Production sharing and the halt on log exports can only be effective with realistic enforcement mechanisms, functional economic zones, and strengthened public-private dialogue.

- Improving framework conditions: Energy, financing, and logistics are prerequisites for any industrial expansion. Without progress on these fronts, the policy of extensive processing will remain a dead letter.

- Structuring the domestic market: Growing urban demand represents a strategic market opportunity, provided that supply flows are formalized, value creation is improved, and the artisanal sector is integrated into a coherent value chain.

4.6.3 COUNTRY-SPECIFIC TRENDS - GABON

1. Highlights of 2025

- First Forestry Economic Forum (September 2025): More than 170 public and private stakeholders gathered to revitalize the sector and lay the groundwork for a permanent public-private dialogue platform.

- Confirmed crisis in the sector: Forestry production has been declining since 2022, driven by a slowdown in international markets (particularly the Chinese market) and a deteriorating operational environment.

- Political ambition reaffirmed: to increase the sector's contribution from 4% to 10% of GDP in the medium term, with priorities including industrialization, certification, traceability, and local processing.

- Persistent cash flow pressures: Longer waiting times for VAT credit refunds, combined with high logistics costs and energy constraints, are causing lasting instability for operators.

- Entry into the second forest rotation cycle: The sector is entering a new structural phase with a more dispersed resource base that is less profitable to harvest, necessitating a revision of the long-term business model.

2. Developments in the Industry

An Industrial Model Under Pressure

The Gabonese model, based on a ban on log exports and the development of local processing — notably through the Nkok Special Economic Zone (SEZ) — has led to a real increase in industrial capacity, but is facing a structural erosion of profitability. Rising transportation and energy costs, logistical delays, and increasing administrative complexity are reducing margins to a level that threatens the viability of many operators.

Taxation and Regulatory Framework

VAT credit refunds are a major point of friction: The lengthening of these processes creates chronic cash flow pressures that hinder companies' ability to invest. Furthermore, increasingly complex administrative procedures and an overall heavy tax burden weigh on the competitiveness of Gabonese timber compared to other tropical sources.

Markets and Competitiveness

Dependence on Asian markets —particularly the Chinese market — exposes the sector to demand volatility. The contraction of this market since 2022 has not been offset by a sufficient diversification into European or African markets. The EUDR and certification requirements are gradually becoming prerequisites for access to European markets, representing an additional cost for operators already under pressure.

Resource and Second Rotation

The transition to the second forest rotation marks a structural turning point: the resource becomes more dispersed, with lesser-known species and less concentrated volumes, which increases logging costs and requires adjustments to management and processing practices.

3. Major Challenges

- Economic viability of operators: The combination of rising costs (transportation, energy, taxes) and cash flow pressures linked to unreimbursed VAT credits structurally undermines companies' profitability.
- Adaptation to the second rotation: Changes in the resource require a rethinking of management, processing, and value-added models, incorporating secondary tree species and adopting a product-based rather than species-based approach.
- Moving up the industrial value chain: Despite the investments made, secondary and tertiary processing remain underdeveloped. Additional investments and improved framework conditions are needed to take a step forward.
- Market diversification: Reduce dependence on Asian markets by developing African markets and strengthening the European presence through certification and compliance with the EUDR.
- Logistical competitiveness: Port inefficiencies and transportation costs constitute a structural competitive disadvantage that targeted action on infrastructure and port management could mitigate.
- Diversification of forestry revenues: Integrating carbon and biodiversity markets into the sector's economic model represents an emerging strategic lever, provided an adequate regulatory and operational framework is in place.
- Public-private dialogue: The establishment of a permanent platform stemming from the 2025 Forum is a rare opportunity to structure more effective sectoral governance and bridge the gap between political ambition and operational reality.

4. Outlook

Gabon is entering a pivotal phase: the foundations of the industrial model established since the log export ban are being tested by the crisis, while the start of the second rotation requires a fundamental overhaul of logging and value-added practices. The stated ambition to increase the sector's contribution to 10% of GDP can only be realized through decisive action on the structural factors affecting competitiveness.

Three key areas are critical to this transition:

- Consolidating the operational framework: Resolving VAT credit issues, reforming logistics, and reducing the tax burden are prerequisites for any improvement in competitiveness. Following up on the recommendations of the 2025 Forum will be a test of the credibility of political will.
- Industrial and commercial innovation: Moving up the value chain toward secondary and tertiary processing, developing products from secondary timber species, and diversifying markets are the drivers of sustainable competitiveness.
- Integrating new forestry revenues: Carbon, biodiversity, and ecosystem services are complementary sources of financing that must be mobilized to reduce pressure on timber resources and strengthen the sustainability of the model.

The announced public-private platform and the ongoing revision of the Forest Code provide a framework for embedding these priorities into operational policies. Gabon's ability to maintain its role as a regional leader will depend on its capacity to align forestry policy, framework conditions, and sectoral innovation.

FORUM ÉCONOMIQUE FORESTIER 2025 (GABON)

A Pivotal Moment for the Revitalization of the Forestry Sector

Held on September 8 and 9, 2025, in Libreville, the first Forestry Economic Forum marked a key milestone for Gabon's forestry and timber sector. Bringing together more than 170 participants from government agencies, the private sector, technical and financial partners, and civil society, the event enabled participants to reach a **shared assessment of the sector's challenges** and identify drivers for its revitalization.

The discussions, organized around four themes (production, logistics, innovative financing, and markets), highlighted major constraints:

- high logistics costs,
- blockages in VAT refunds,
- loss of competitiveness,
- limited market access.

The forum resulted in **operational recommendations**, including:

- simplification and digitization of procedures,
- improvement of logistics infrastructure,
- tax incentives for processing and certification,
- development of the domestic market and new outlets.

It also formalized a major commitment by the government: **the establishment of a permanent public-private dialogue platform**, designed to structure the sector's governance and support its transformation.

4.6.4 COUNTRY-SPECIFIC TRENDS - CÔTE D'IVOIRE

1. Key Developments in 2025

- Entry into force of the FLEGT VPA: Signed on February 19, 2024, between Côte d'Ivoire and the European Union, the VPA has been in effect since May 1, 2025. All stakeholders, under the coordination of the Ministry of Water and Forests, are working toward the issuance of the first FLEGT licenses, scheduled for the end of 2028. This is a pivotal step toward accessing the European market and complying with the EUDR.

- Forest restoration as a national priority: In the face of dwindling resources, the PPREF policy and its two operational strategies (SPREF, SVPF) are attracting growing interest from technical and financial partners. This is a positive sign, but implementation remains fragile in the face of agro-industrial pressures on forest lands.

- Utilization of rubber tree wood as a lever for diversification: The conversion of rubber plantations reaching the end of their life cycle represents an estimated potential of 700,000 m³ of sawn timber (with rectangular section) per year. Against a backdrop of dwindling natural timber species, this substitute resource could help secure the supply for industries.

- Persistence of artisanal sawing: Informal operations remain a major obstacle to the structuring of the sector. They create unfair competition for formal businesses in a domestic market where demand is nevertheless growing, and undermine the traceability and legality objectives promoted by the FLEGT VPA.

2. Developments in the Industry

Regulatory Framework and Forest Governance

The 2019 Forest Code forms the foundation of the ongoing reform. It introduces three major innovations: the requirement to register all forests of the national domain, along with the development of an appropriate management plan; the recognition of ownership of forests and trees in favor of the landowner or planter; and a mechanism for sharing benefits derived from carbon sinks and forestry policies. These provisions are driving regulatory reforms that are still underway, notably regarding the registration of private forests and the regulations governing benefit-sharing.

In terms of governance, Côte d'Ivoire's forestry policy has classified forests into four categories based on their conservation status, opening up the management of state-owned forests to a variety of stakeholders — including private operators, even those from sectors other than the timber industry — under concession agreements. This openness presents an opportunity for the sector, provided that the public-private partnership framework is sufficiently structured.

FLEGT VPA and EUDR: A Dual Challenge and Opportunity

The FLEGT VPA constitutes the central framework for Côte d'Ivoire's forest governance vis-à-vis the European Union. Its entry into force in May 2025 marks the start of the countdown to the issuance of the first FLEGT licenses, scheduled for the end of 2028. The Legality Verification System (LVS), currently under development, must cover all timber flows — both exports and the domestic market — which requires a considerable effort to formalize the artisanal sector.

At the same time, the EU Deforestation Regulation (EUDR), which is being phased in, requires Ivorian exporters to demonstrate that their products do not contribute to deforestation. For Côte d'Ivoire, a country whose forest cover has suffered one of the sharpest declines on the continent, this requirement is both a real challenge and an opportunity to accelerate forest governance reforms. European stakeholders in the sector are closely monitoring the evolution of the LVS as a proxy for compliance. The PASSAD project directly supports Ivorian companies in achieving this compliance.

Markets, Processing, and Operational Constraints

The Ivorian timber sector faces a structural tension between the dwindling supply of natural forest resources and the need to maintain industrial capacity. The ban on log exports requires on-site processing, but the renewal of processing facilities — adapted to small-diameter timber — is hampered by limited access to financing. The shortage of raw materials exposes several companies to the risk of reduced activity or even closure.

The domestic market remains largely informal, driven by artisanal sawing. Structuring this segment is a prerequisite both economically — to provide additional market opportunities for industrial stakeholders — and on a regulatory level, to meet the requirements of the LVS. This is a complex undertaking involving taxation, traceability, and the formalization of informal actors.

3. Major Challenges

- Operationalizing the FLEGT VPA: Issuing the first FLEGT licenses by 2028 requires finalizing the LVS, integrating informal trade flows, and strengthening the capacities of companies. This will serve as a test of the credibility of Côte d'Ivoire's forestry reform in the eyes of European buyers.

- Compliance with the EUDR: Exporting companies must demonstrate the traceability of their supplies down to the individual plot. Against a backdrop of intense agro-industrial pressure on the land, the coordination between the EUDR and the LVS is a top-priority technical and institutional undertaking.

- Sustaining the forestry industry: The shortage of raw materials, combined with limited access to financing for modernizing processing equipment, is undermining the formal industrial sector. In the short term, it is necessary to explore alternative sources of supply — including the importation of logs.

- Combating illegal logging: artisanal sawing represents a systemic obstacle to the structuring of the sector. Without tangible progress on this front, the formalization of the domestic market and the LVS's objectives will remain out of reach.

- Forest restoration and land tenure security: The transition to plantation forestry requires a functional forest cadastre and a robust public-private partnership. Agro-industrial pressures and competing land uses pose real risks to the sustainability of the forest domain.

4. Outlook

Côte d'Ivoire is entering a phase of profound transformation in its forestry sector, driven by the combined effects of an ambitious regulatory reform and persistent structural constraints. The entry into force of the FLEGT VPA sets a clear course toward 2028, while the EUDR requires companies to begin compliance efforts immediately. The success of this transition depends on the country's ability to align institutional reform, the structuring of the private sector, and the fight against informality.

Three key areas are critical to this transition:

- Operationalizing the FLEGT VPA and complying with the EUDR: finalizing the LVS, strengthening companies' capacity to document their supply chains, and integrating informal actors are prerequisites for sustainable access to the European market.

- The replenishment of forest resources: development of private forestry through the forest cadastre, public-private partnership for concession management, and the development of new resources (rubber trees, plantations). Without replenishing raw materials, the industry's long-term viability remains at risk.

- Structuring the domestic market: formalizing artisanal actors, traceability, and appropriate taxation. A structured domestic market is both a strategic outlet for industrial stakeholders and a lever for the credibility of the LVS.

In this context, the PASSAD project and ongoing ATIBT initiatives provide essential support frameworks by combining capacity building, support for EUDR compliance, and private sector structuring.

4.7 RACEWOOD 2025

A HIGHLIGHT: RACEWOOD IN POINTE NOIRE

A SUCCESS

160 PARTICIPANTS

3 MINISTERS

AN ARTISAN CONTEST

RICH AND VARIED EXCHANGES

GRAND PRIX D'ÉBÉNISTERIE (CABINETMAKING GRAND PRIX)

6 YOUNG PARTICIPANTS
Cameroon, Congo, and Gabon

A JURY OF PROFESSIONALS
Wood Industry Experts

FSC-CERTIFIED WOOD
Supplied by sponsoring companies

5 PROJECTS

ADEFAC - CENTRAL AFRICA
STRUCTURING CONTINUING PROFESSIONAL DEVELOPMENT

Areas of Operation: Cameroon, Congo, Gabon, DRC

Duration: February 2020–December 2025 (project completed)

Total budget: €5,000,000

Funding: *Agence Française de Développement* (AFD)

Partners: RIFFEAC (Project Owner; ATIBT acted as Delegated Project Owner) Oréade-Brèche / Forhom, professional organizations from the four countries

Project Objective:
ADEFAC aimed to develop a continuing professional development (CPD) program for the forestry and wood sector in Central Africa, co-designed by companies and training institutions. The central challenge: to improve the employability of sector stakeholders — both upstream and downstream — and to strengthen the sector's competitiveness through skills development.

ACHIEVEMENTS

- **198 trainers trained** (including 31 women) across the four countries, forming a regional pool of CPD trainers
- **612 learners trained** across 42 modules (including 152 women, or 25%)
- **27 professional organizations** supported; 25 agreements signed with 16 technical partners
- **Thematic Working Groups** (TWGs) facilitated in each of the four countries
- **Guide to the Local Use of Tropical Timber** from Central Africa (750 copies printed, freely downloadable)
- **Mapping of occupations** and 30 occupation-skill profiles
- **9 short videos** promoting careers in the sector
- **Training catalog** and guide to organizing modules
- RIFFEAC Gender **Strategy**

UFA REFOREST - CAMEROON

PLANTING IN DEGRADED AREAS AND ENRICHMENT OF LOGGING GAPS

Project Area:
Cameroon (4 UFAs - total area: 1,294,592 ha)

Duration:
March 2022 – December 2025

Funding:
European Union

Partners: Gembloux Agro-Bio Tech (University of Liège), Nature+, ENSET Douala, PALLISCO, AlpiCAM-Grum-CAM, SEFAC, SEEF

Project Objective:
The UFA-REFOREST project aims to restore the balance of commercial tree species in Cameroon's Forest Management Units (UFAs) through participatory and inclusive reforestation of degraded areas. By supporting four pilot forestry companies, it demonstrates the technical and economic viability of reforestation within production areas, produces scientific benchmarks that can be replicated on a regional scale, and involves local communities as key actors in forest restoration.

ACHIEVEMENTS

- **6 seed orchards**
- **5** functional **nurseries**
- **490,000 seedlings produced in 4 years,** from 32 marketable tree species and 5 NTFPs (Moabi, Mubala, Rondelle, Nkouarsa, Andok)
- **276,133 trees planted across the 4 UFAs**; 1,226 ha of enriched area (1,122 ha in logging gaps and parks, 104 ha in open-field plantations)
- **317 local residents trained and paid**; 27 communities involved; 4 active Farmers' Forest Committees (CPF)
- **Silvicultural protocols** (nurseries, planting, maintenance) integrated and adopted by the companies
- **2 harmonized monitoring databases**; operational monitoring system in place across all 4 companies
- **3 scientific articles published** in international journals (Forest Ecology and Management, Restoration Ecology), 1 doctoral dissertation, 10 master's theses
- **16 knowledge-sharing articles**, 1 documentary, 4 videos, 1 ecological journal for children
- **Study on the Current State** of Regulations Governing Timber Plantations in Cameroon

PRIVATE SECTOR SUPPORT (ASP) - CAMEROON

Area of Operation:
Cameroon

Duration:
December 2022–
November 2026

Total budget:
€2.2 million

Funding:
European Union

Partner:
JMN
Consultants

Project Objective:
The ASP Cameroon project aims to strengthen the forestry and timber sector's contribution to a green economy that creates local jobs and is resilient to climate change. It supports businesses, professional organizations, and government agencies in adapting to international requirements — certification, CITES, and the EUDR — while also promoting industrial competitiveness, the valorization of forest resources, and the development of the domestic market.

ACHIEVEMENTS

- **Domestic Timber Market (DTM)**
  - DTM site in Ngaoundéré operational: start of construction
  - Specification bulletin designed for the export of DTM timber products to neighboring countries
  - Charcoal value chain assessed in 4 regions; training sessions conducted with professional associations
  - DTM digital platform (scheduled for completion in 2026)
- **CITES:** CITES technical training (restoration rates, NDF) provided to companies and national CITES bodies; support for international CITES activities, including the Plants Committee
- **PES:** ATIBT's participation, through the Carbon & Biodiversity Committee, in the development of the Organization for Biodiversity Certificates (OBC), aimed at developing biodiversity certifications
- **EUDR:** Launch of a study specific to Cameroon
- **Certifications:** support for the development of the PAFC in Cameroon — training and mock audits of companies
- **Promotion of sustainable Cameroonian timber**
  - Major funding for ATIBT's participation in CIB 2024
  - 5 brochures on the project's partner companies
  - Importer trips to Cameroon
  - Major contribution to the MTT platform
  - Communication training for companies
  - Creation of the ATIBT Cameroon Facebook page
  - Participation in the organization and funding of RACEWOOD 2025 in the Congo
  - Website Development for SYNEFOR
- **Advocacy:**
  - Proposal for a new classification system for processing units submitted to MINFOF
  - Sectoral Economic Report (taxation, market, certification)
- **Technical brochure** on improving material yield in sawmills
- **Guide on timber valorization through gluing** (LKTS approach)

DOMESTIC TIMBER MARKET (MIB) - CONGO

Project Area:
Republic of the Congo

Duration:
August 2024 – July 2028 (48 months)

Total budget:
€2,000,000

Funding:
European Union

Partners:
Government, Private Sector, Artisanal Sector, Civil Society, Research centers, Vocational training centers, Technical and financial partners

Project Objective:
The MIB Congo project aims to improve the competitiveness and sustainability of the domestic timber sector in the Republic of the Congo. It addresses a key structural challenge: organizing a domestic market that remains largely informal by strengthening the capacities of micro, small, and medium enterprises (MSMEs), improving the sector's governance, and creating the conditions for better alignment between the domestic market and sustainability requirements.

ACHIEVEMENTS

- **RACEWOOD 2025:** 140 participants; public-private dialogue established at the national and subregional levels
- **Comprehensive assessment of the domestic timber value chain,** validated during four workshops (approximately 30 participants each)
- **Process to establish the timber advisory laboratory** initiated in collaboration with technical partners
- **Initial data collected** on artisanal practices and the use of lesser-known tree species
- **Multi-stakeholder dialogue** initiated among industry stakeholders
- **Surveys of artisans** on lesser-known timber species (LKTS)

PASSAD - CÔTE D'IVOIRE

PROGRAM TO SUPPORT SUSTAINABLE FORESTRY AND AGRI-FOOD SYSTEMS

Area of operation:
Côte d'Ivoire

Duration:
June 2025 –
December 2028

Total budget:
€960,000

Funding:
European Union

Partners:
European Forest Institute (EFI), ATIBT, Union of Industrial Timber Producers (*Syndicat des Producteurs Industriels du Bois, SPIB*)

Project Objective:
The PASSAD-Forêt project supports the transformation of the Ivorian forestry sector toward sustainable practices, building on the implementation of the FLEGT VPA and adaptation to international market requirements. ATIBT is involved in this project to strengthen forest governance, support companies' compliance with the EUDR, and build the private sector's capacity to integrate into a structured and competitive industry in European markets.

ACHIEVEMENTS

- **Operational framework** established and team deployed
- **National EUDR workshop organized**: first structured awareness-raising initiative for Ivorian forestry companies on European requirements
- Initiated a process of **private-sector engagement** on compliance and market access issues
- **Improved understanding** among companies of the requirements related to the FLEGT VPA and the EUDR

CONFORMA - GUATEMALA
COLLABORATIVE FOREST MANAGEMENT OF THE SELVA MAYA

Project Area:
Guatemala – Selva Maya region (Petén)

Duration:
2024 – 2028
(3.5 years)

Total budget:
€4,438,584 (FFEM grant: €2,140,000 ATIBT contribution: €123,675)

Funding:
French Global Environment Facility (FFEM

Partners:
CIRAD
(lead partner),
ACOFOP,
Rainforest Alliance,
CATIE, CEMCA,
ATIBT

Project Objective:
The ConForMa project aims to strengthen the community-based forest management model in the Selva Maya region by leveraging FSC-certified community forest concessions to develop inclusive value chains. ATIBT specifically contributes to commercial development: promoting lesser-known tree species, connecting with European and international markets, and developing marketing tools (Tropix, MyTropicalTimber, Fair&Precious).

ACHIEVEMENTS

- **Formalized partnership** between scientific, institutional, and community stakeholders (CIRAD-ACOFOP agreement signed)
- **Field visits** conducted in FSC-certified concessions: diversity of production documented (timber and NTFPs)
- **Initial discussions initiated** on the promotion of lesser-known tree species and their positioning in niche markets
- **ATIBT positioned as a key player** in the international promotion of the community forestry model
- **Report on the launch mission** to Petén (September 2025)
- **Technical datasheets on tree species** and communication materials (currently being developed)
- **Planned participation in the *Carrefour International du Bois*** (CIB), Nantes, June 2026

TROPICAL TIMBER TRADE FACILITY (TTT)

PROMOTION OF LEGAL AND SUSTAINABLE TIMBER TRADE IN THE CONGO BASIN

Area of Operation:
Congo Basin (Cameroon, Gabon, Congo, DRC, CAR, Equatorial Guinea), China, European Union

Duration:
August 2025–October 2026

Total budget:
€1,500,000

Funding:
German Federal Ministry for Economic Cooperation and Development (BMZ)

Partners:
COMIFAC-CTWPDA

Project Objective:
The TTT project aims to combat illegal deforestation in the Congo Basin by addressing the entire tropical timber value chain — from African producers to European consumers, via China. It addresses the lack of transparency in supply chains, the low adoption of sustainability standards, and the insufficient compliance capabilities of sector stakeholders. ATIBT contributes its expertise in certification, traceability, species promotion, and market access.

ACHIEVEMENTS

- **Initiative to revise** codes of conduct launched in collaboration with professional associations in the three geographic regions
- **Support for PAFC certification** provided to companies; accreditation system for auditor trainers currently being developed
- **Traceability/EUDR analysis** initiated in Cameroon
- **LKTS pilot studies** (Eveuss, Monghinza) launched
- **Development of MyTropicalTimber** underway (scheduled launch in May 2026)
- **Capacity-building** for stakeholders in the Congo Basin on NDFs underway
- **Process to revise** the Timber Trade Portal for EUDR due diligence and development of a new framework for country datasheets
- **Participation in the CITES CoP** in Samarkand

MADERA CERO DEFORESTACIÓN

TRACEABILITY AND PROMOTION OF SUSTAINABLE TIMBER FROM THE MEXICAN SELVA MAYA

Project Area:
Mexico — States of Campeche and Quintana Roo (Yucatán Peninsula)

Duration:
May 2024 – April 2026 (24 months)

Total budget:
€339,160

Funding:
European Union (AL-INVEST Verde program)

Partners:
Tuumben K'ooben Cooperative, FSC-certified third-party *ejidos*
Other participants:
SEDE Quintana Roo, Minkadev, Probos

Project Objective:
Led by ATIBT as the lead partner, the *Madera Cero Deforestación* project aims to prepare the community-based forestry sector on the Yucatán Peninsula for the requirements of the European Deforestation-free Regulation (Regulation (EU) 2023/1115), while transforming a sector that remains largely focused on the sale of raw timber with no added value — 98% of forest *ejidos* sell their timber as logs. It targets SMEs and forest communities in the states of Campeche and Quintana Roo, in a region where community-based forestry (*ejidos*) represents a model that needs to be strengthened in the face of pressures from intensive agriculture and livestock farming.

ACHIEVEMENTS

- **Information session organized** in Quintana Roo with *ejidatarios*: presentation of the EUDR and the MinkaDev digital traceability tool
- **Partnerships established** with FSC-certified forest *ejidos* (PETCACAB, Noh Bec) and with the Quintana Roo Ministry of Economic Development (SEDE)
- **Barriers to accessing the European market** identified and areas for improvement documented
- **Call for tender launched** for nearshoring workshops and commercial initiatives (Phase 2)
- **Webinar** "Building and Designing with Tropical Wood," co-organized with the CNDB (October 29, 2025): 90 minutes of discussion with architects, specifiers, and experts (Canal Architecture, Woodenha, HPL Architectes, LCB, CIRAD)

6

OUTLOOK FOR 2026

2026 promises to be a year of consolidation and expansion. The EUDR schedule has yet to be confirmed, projects launched in 2025 are beginning to yield their first results, and the portfolio of new projects in the pipeline reflects the confidence that donors have in ATIBT. The CIB in Nantes this June will be the highlight of the sector.

6.1 STRATEGIC PRIORITIES

Supporting EUDR Compliance

Compliance with the EUDR remains the key deadline for companies in the sector, with the effective date to be confirmed by European institutions. ATIBT will intensify its support for member companies through training workshops, assistance with the implementation of traceability tools, and coordination with European platforms (TRACES, the EUDR information system). Particular attention will be paid to small and medium-sized enterprises, for which due diligence requirements represent a disproportionate burden.

The ASP Cameroon project (ongoing through June 2026) will continue to provide direct on-the-ground support, particularly regarding the recognition of certification under the EUDR and the strengthening of the domestic timber market.

Strengthening CITES Capacities in Preparation for CoP20

The CITES CoP20 represents a major challenge for African tropical timber-producing countries. ATIBT will continue to provide technical support to the national scientific authorities of Cameroon, Gabon, Congo, and Côte d'Ivoire for the drafting and review of non-detriment findings (NDFs) and the preparation of robust dossiers. The goal is to prevent procedural shortcomings from leading to further trade barriers.

In this context, ATIBT's accreditation with CAFI (Central African Forest Initiative) in November 2025 — paving the way for a $5 million project — represents an opportunity to establish sustainable support for the region's governments.

Expanding the Project Portfolio

Eight new project opportunities were identified at the December 2025 Board of Directors meeting. They represent significant funding potential and cover topics that complement ATIBT's current activities.

Project	Funding	Scheduled Start	Topics
ADEFAC 2 *Continuing Professional Development*	AFD €5 million	July 2026	Project Owner: RIFFEAC – Delegated Project Owner: ATIBT Professional Training, Congo Basin
ASP Gabon *"Support for the Development of value chains in the forestry and timber sector"*	DEU Gabon €4.6 million (under tender)	2027	Tender submitted as a consortium with CIRAD, UFIGA, Nature+, and GxABT — resource development, Okoumé, CITES, EUDR, NTFPs, Cocoa, PES, processing, F&P, markets
CAP FORETS "Concessions and Stakeholders for Sustainable and Transitional FOREST Landscapes"	FFEM €2 million	September 2026	CITES, LKTS, community development, innovative mechanisms, markets
FGMC2 (TDUK) "Engaging the Private Sector in National Sustainable Forestry Systems and International Trade"	FCDO £100,000	January 2026	Private-sector commercialization, markets
CBC (Timber Skills Cameroon)	UE 2 M$ max	2026–2028	Training in sharpening and sawing : SYNEFOR, GFBC, ENEF
ERASMUS+	UE €400,000	2027–2029	Specialized training in furniture making and interior design; Gabon, Congo, DRC, and Equatorial Guinea.
CAFI Project	PES Call for tender in progress	2027	PES Congo
FGVC program *"Development of Competitive and Sustainable Timber Value Chains in Central Africa through Market-Adapted Products and the Valorization of Lesser-Used Timber Species (LUTS)"*	EU / FAO – €200,000 ATIBT + €1 million for companies	2026	LKTS/LUTS, grant for companies, Congo/Gabon

6.2 OPPORTUNITIES

The CIB Nantes (International Timber Show) - June 2026

The *Carrefour International du Bois* (CIB) will be held in Nantes from June 2 to 4, 2026. Held every two years, it brings together all stakeholders in the global forestry and timber sector. ATIBT will actively participate and use this event as a platform for dialogue between African producers, European buyers, regulators, and NGOs. The ConForMa project will help showcase the timber species of the Selva Maya and promote Fair&Precious to new potential buyers there.
ATIBT will mobilize its members to ensure a visible and active presence. The CIB will provide an opportunity to present the work carried out in 2025, highlight certification results and the tools developed for the EUDR, and strengthen ties between African producers and European buyers amid the restructuring of supply chains.

Trade Dialogue with China

The TTT (Tropical Timber Trade Facility) project will open avenues for structured dialogue between African, Chinese, and European federations. Against a backdrop of declining Chinese demand and global tariff tensions, the ability to engage Chinese stakeholders directly on the issues of sustainability and traceability represents a rare strategic opportunity for ATIBT.

The Rise of Fair&Precious

The TRUE/FALSE campaign launched in 2025 (45 posts, 39,670 views, 72% positive sentiment) demonstrated the collective's communication potential. In 2026, the brand's reach will be expanded through the hiring of a dedicated specifier (ConForMa project) and the development of new communication formats targeting European specifiers and project owners.

6.3 AREAS OF CONCERN

THREE RISKS TO MONITOR IN 2026

EUDR Regulatory Risk: Disorganized implementation or inconsistent interpretation of requirements by EU member states could create trade distortions that disadvantage well-prepared African operators. ATIBT must remain actively vigilant regarding implementation procedures and intervene with European institutions if necessary.

CITES Risk: New listings of African tropical timber species at CoP20, without prior strengthening of producing countries' management capacities, could lead to new trade barriers. Efforts to engage with national delegations and CITES bodies must be intensified starting in the first quarter of 2026.

Risk of Market Fragmentation: Persistently weak Chinese demand and tariff instability linked to U.S. policies could lastingly undermine the financial stability of forestry companies in the Congo Basin. ATIBT will closely monitor market developments and continue to advocate for appropriate support mechanisms.

7 GOVERNANCE

7.1 BOARD OF DIRECTORS

The ATIBT Board of Directors brings together representatives from all membership categories: producers, importers, consulting firms, nongovernmental organizations, research institutions, professional associations, and representatives of member states. It consists of an Executive Board (Chair, Treasurer, and elected directors*) and directors representing member states (**), supplemented by observers.

POSITION	NAME	ORGANIZATION	COUNTRY	SECTOR
President*	Françoise **VAN DE VEN**	Individual	GA	Individual
Treasurer*	Michel **ROUGERON**	PALLISCO	CM	Producer
Director*	Stéphane **RIVAIN**	OREADE BRECHE	FR	Consulting firm
Director*	Ulrich **GRAUERT**	INTERHOLCO	CH	Producer
Director*	Dominik **MOHR**	CID	FR	Importer
Director**	Paulette **EBINA**	Congo	CG	State
Director**	Edouard **ZAMA**	Central African Republic	CA	State
Director**	Elvire-Joëlle **ZOUZOU MAILLY**	Republic of Côte d'Ivoire	CI	State
Director (obs.)	Peter **ALELE**	FSC	MEX	NGO
Director	Tidiani Jeff **TALL**	ROUGIER	FR	Producer
Director	Paolo **BRACCIANO**	REGALIS	AE	Importer
Director	Bernard **CASSAGNE**	FRM	FR	Consulting firm
Director	Stefano **CORA**	CORA DOMENICO & FIGLI	IT	Producer
Director	André **DE BOER**	ETTF	NL	Professional Association
Director	John **DE HAAN**	SOMIVAB / RAIL EUROPE	NL/BE/GA	Producer - Manufacturer
Director	Benoit **DEMARQUEZ**	TEREA	FR	Consulting firm
Director	Jean-Louis **DOUCET**	University of Gembloux	BE	Research
Director	Emmanuel **GROUTEL**	WALE	FR	Individual Member
Director	Arnaud **HETROIT**	LCB	FR	Association
Director	Vincent **ISTACE**	CIB-OLAM	CH	Producer
Director	Cecilia **JULVE**	NATURE+	BE	NGO / Consulting firm
Director	Alain **KARSENTY**	CIRAD	FR	Research
Director	Peter **LATHAM**	PEFC	UK	NGO
Director	Jean-Marie **NTOUTOUME**	UFIGA	GA	Professional Association
Director	Markus **PFANNKUCH**	CEB – Precious Woods	CH	Producer
Director	Han **DE GROOT**	PFF	NL	Foundation / NGO
Director (obs.)	Sven **WALTER**	FAO	IT	International Organization

* Members of the Executive Board ** Representatives of Member States

Managing Director: Benoît **JOBBÉ-DUVAL** (in office since March 15, 2016)

7.2 OUR MEMBERS

We always wish our new members a warm welcome through our newsletter. News about our members is available on our website.

ATIBT MEMBER LIST

DONORS & FUNDERS — PARTNERS				
AFD – *Agence Française de Développement*	FAO – Food and Agriculture Organization of the United Nations	ITTO – International Tropical Timber Organization		
COUNTRIES				
Central African Republic	Gabonese Republic	Republic of Congo	Republic of Côte d'Ivoire	
PRODUCERS				
ALPICAM	BONUS HARVEST	CIB – OLAM AGRI	IFCO	INPROBOIS
INTERHOLCO (IFO)	LIKOUALA TIMBER	MADERACRE	MADERERA BOZOVICH S.A.C.	MIL MADEIRAS PRECIOSAS
MOKABI SA (GROUPE ROUGIER)	NSD'A	PALLISCO CIFM	PRECIOUS WOODS GABON – CEB	ROUGIER GABON
SEEF	SEFECCAM	SOMIVAB	STS GUYANA	THANRY CONGO (STC)
TRANCHIVOIRE	TRITON			
MARKETERS				
ADENTRA	BAILLIE LUMBER	BASSO LEGNAMI	BOUYGUES CONSTRUCTION	CABD – *Compagnie Atlantique des Bois et Dérivés*
CIBM – SAINT-GOBAIN	CID	CORA DOMENICO & FIGLI SPA	CROSS TRADE	DENDERWOOD
ECOCOA	ETS. PIERRE HENRY & FILS	ETT FINE WOODS	EXOTT	F.JAMMES
FIBRES INDUSTRIES BOIS SAS	FRITZ OFFERMANN KG	GIESELMANN GMBH & CO KG	GILMOUR & AITKEN	GLOBAL TIMBER

HERMPAC	HUPKES WIJMA B.V.	IMPEXO INTER-NATIONAL GMBH	INTERHOLCO AG	JAF GROUP
KEFLICO	LATHAM	LUMBER UNIPRES-SOAL LDA	MILLET	MOURAO WOOD UNIPESSOAL LDA
NHG TIMBER	OLAM GLOBAL AGRI PTE. LTD.	PASQUET MENUISERIES	PELTIER BOIS	PRECIOUS WOODS HOLDING AG
RAIL EUROPE	REGALIS FZCO	ROUGIER AFRIQUE INTERNATIONAL	SCBT – *Société de Commercialisation des Bois Tropicaux*	SFM – *Société Forestière du Maine*
SORIEL S.L.	STOCKMANS WOOD PRODUCTS BVBA – SWP	SYLVACO GROUPE MALVAUX	THE PENROD COMPANY	TIMBER REX
TIMTRADE SRL	TOUBOIS	TRADELINK	VANDECASTEELE HOUTIMPORT	VASTO LEGNO
SERVICE COMPANIES				
11FOUNDRY	ADRYADA	BOCS	BUREAU VERITAS	DUBAI WOODSHOW
FORÉZIENNE MFLS	FRM INGÉNIERIE	GSEZ	IED INVEST	SNCF RÉSEAU
STRATEMARK	TIMBERID			
CONSULTING FIRMS				
AETS AFRIQUE	BFCONSULT	ETICWOOD	FRM INGÉNIERIE	GLOBAL FOREST ENVIRON-MENT CONSUL-TING (GFEC)
GREEN CONSUL-TECH	JMN CONSULTANT	KINOMÉ	MINKADEV	NATURE+
ONF INTER-NATIONAL	ORÉADE-BRÈCHE	PREFERRED BY NATURE	*SOCIÉTÉ INDUS-TRIELLE DES BOIS* (SIB)	SOLICAZ
TEREA				
ASSOCIATIONS & UNIONS				
AEIM	AIMEX	CSFI	ETTF – European Timber Trade Federation	FEDERLEGNOAR-REDO – FEDE-COMLEGNO
FEDUSTRIA	FEP – European Federation of Parquet Industry	FIB – *Fédération des Industriels du Bois*	GD HOLZ – *Gesamtverband Deutscher Holzhandel e.V.*	GFBC – Cameroon Timber Industry Association

LCB – *Le Commerce du Bois*	SPIB – *Syndicat des Producteurs Industriels de Bois*	SYNEFOR	TTF – Timber Trade Federation	UFIGA – *Union des Forestiers et Industriels du Bois du Gabon*
UNICONGO (*Union Patronale et Interprofession-nelle du Congo*)				
NGOs				
FSC® International	IUCN – International Union for Conservation of Nature	PEFC Council	Precious Forests Foundation	Prince Albert II of Monaco Foundation
PROBOS	Rainforest Alliance	WCS – Wildlife Conservation Society	World Forest ID	WRI – World Resources Institute
WWF – World Wide Fund for Nature				
RESEARCH AND TRAINING CENTERS				
CIRAD – Agricultural Research for Development	ENSTIB	ERAIFT – *École Régionale Postuniversitaire d'Aménagement et de Gestion Intégrés des Forêts*	ESB	RIFFEAC
Université de Liège / Gembloux Agro-Bio Tech				
EXPERTS – INDIVIDUAL MEMBERS				
Alain LEMAIGRE – ALCEBOIS	Baptiste MARQUANT	Benoît GOMMET – France Timber	CD CONSEILS	Christian MORASSO
Edoardo GIVONE	Emmanuel GROUTEL – WALE	Frédéric ANQUETIL – A.F Bois	Isidoro BLANCHI – FERIMEX	Julie Bertille LANDRY
LACERDA PARTNERS	Nicolas PERTHUISOT	Olive PEOPLE	Olivier BONNEAU – OBBOIS	Olivier DEVILLARD
Olivier MEGARD	Pierre-Yves LE FLECHER	Richard FAYS – FAYSWOOD	SOTOMAR	Vincent PELÉ – EKWATO

TimberID / Deeplai

January 2025

TimberID is a digital solution developed by Deeplai, designed to facilitate compliance with the European Deforestation Regulation (EUDR). It enables companies to collect, organize, and share the data necessary for due diligence, while ensuring the confidentiality of the information. Using artificial intelligence, the solution analyzes risk levels and proposes tailored mitigation measures, including physical product authentication and satellite imagery monitoring. Compatible with ERP systems and the EU's TRACES platform, TimberID is accessible to all companies, regardless of size.

Likouala Timber

Republic of the Congo, April 2025

Likouala Timber holds two forest concessions in the northeastern Republic of the Congo, covering 525,000 hectares. The company stands out for its strong commitment to local processing, with an estimated annual production of 150,000 m³ at its Bétou industrial site, which includes three sawing lines, a drying capacity of 2,000 m³ per month, and a finished products section (three-ply panels, S4S boards, decking). The company is OLB-certified.

STC, Société Thanry Congo

Republic of the Congo, April 2025

Founded in 2001, Société Thanry Congo (STC) operates in the Ipendja UFA in the Republic of Congo. Its activities include logging, processing (two sawmills and a veneer peeling unit), and the trading of raw and processed timber. The company employs more than 350 people and is actively involved in local development, notably through a medical-social center and Local Development Fund (LDF) projects. It purchases only wood from legal and verifiable sources and recently obtained OLB certification. Discussions are underway with PAFC Congo Basin in order to advance toward PEFC-PAFC certification.

HIGHLIGHT OF 2025

Mokabi SA / Groupe Rougier
Republic of the Congo
A subsidiary of the Rougier Group, Mokabi SA manages 586,000 hectares of forest in the north of the Republic of the Congo, producing approximately 100,000 m³ of logs per year. In 2025, Rougier obtained the FSC Sustainable Management certification for the Mokabi-Dzanga forest unit.
Mokabi has also joined the Fair&Precious collective, reaffirming its commitment to promoting its certified timber in the most demanding markets.

DEPARTURES IN 2025

The Timber REX company as well as members Richard FAYS (Fayswood) and Nicolas JAMET (Abarco) left ATIBT in 2025.

7.3 OUR TEAM

ATIBT relies on a multidisciplinary team whose expertise covers all aspects of the industry: sustainable forest management, certification, regulatory compliance, project development, and international advocacy. This diversity of expertise enables the association to respond quickly to changes in the sector and to provide targeted support to its members. Beyond technical expertise, the team is driven by a collective commitment to responsible tropical forestry, which serves as a driver of economic and social development for the populations of producing countries.

STAFF CHANGES IN 2025

NEW HIRES

Célestin AHOUTOU
PASSAD Project Manager, Côte d'Ivoire

Elise CAMBIER
China Dialogue Program Officer (TTT)

Armand Blaise DIAMVINZA
Senior Technical Assistant, MIB Congo Project

Henri-Michel ELLA
Technical Assistant, PASSAD, Côte d'Ivoire

Solène GASNIER-DUFAUT
TTT Project Manager

Serge MADZOU
Secondary Technical Assistant, MIB Congo Project

Philippe NKENNE TIKENG
Program Officer for Tree Species Vulnerability (TTT)

DEPARTURES

Jacqueline LARDIT-VAN DE POL
ADEFAC-Gabon Project Coordinator

Hortense ELLA-MENYE BATINDEK
Communications and Monitoring & Evaluation Manager, ADEFAC Project

ATIBT extends its warmest thanks to the staff members who left the team in 2025 for their contributions to the association's development.

THE TEAM

Europe

Benoît Jobbé-Duval
Managing Director

Caroline Duhesme
Strategic Director

Sandra Bliault
Administrative and Financial Manager

Maylis Borelli
Compliance Manager

Nathalie Bouville
Communications Manager

Elise Mazeyrac
Training Manager

Franck Monthe
CITES Manager

Jessica Delekian
Administrative Assistant / Member Relations Manager

Solène Gasnier Defaux
TTT Project Manager

Paul Cuveillier
Al Invest Project Manager

Elise Cambier
Program Officer

Philippe Nkenne
Program Officer

Alessandra Negri
Program Officer

THE TEAM

Central Africa and Côte d'Ivoire

Alain Tsiotsop
Congo Country Manager

Célestin Ahoutou
PASSAD Project Manager

Germain Yene
Cameroon Country Manager

Yanick Nkoulou
UFA-Reforest Project Manager

Armand Diamvinza
Senior Technical Assistant, MIB

Henri Michel Ella
FLEGT Technical Assistant

Monique Ngoma
Administrative and Financial Assistant

Jean-Serge Madzou
LKTS Technical Assistant

Achille Monka
Driver

7.4 OUR RESOURCES

Financial transparency is a commitment to our members. Here is how your resources were used.

SOURCES OF FUNDS FOR 2025

Membership dues rose to **€291k**, an increase of **+3%** compared to 2024 (€284k). Their relative share of the overall budget stood at 8%, a natural decline due to the strong growth in grants.

Membership dues constitute a regular, stable, and unconditional source of revenue, ensuring the long-term viability of ATIBT and providing significant security to all of our financial partners.

Grants totaled **€3,493k**, an increase of **+75%** compared to 2024 (€1,999k). This upward trend can be attributed to three key factors:

- **the launch of new initiatives**, including the PASSAD project (EFI), the CONFORMA project (led by CIRAD – AFD/FFEM), and finally the TTT project (tropical timber traceability) (GIZ);
- **the steady progress of ongoing projects**, such as the MIB Congo project (DEU Congo), ASP Green Pact (DEU Cameroon), and AL INVEST (SEQUA);
- **and finally, the full completion of certain** ADEFAC (AFD) and UFA Reforest (DEU Cameroon) **projects**, as well as the closure of the PPECF III program and the ZSL project.

STATEMENT OF EXPENDITURES FOR 2025

ATIBT's budget for fiscal year 2025 was **€3,829k.**

Expenses totaled **€3,789k in 2025,** resulting in a net profit of **+€39,211** for the fiscal year.

It should be noted that **31% of the total budget (€1,190k) corresponded to the share of grants transferred** to our implementing partners.

In 2025, ATIBT posted a profitable year and strengthened its financial position.

Fiscal Year	Revenue	Expenses	Net Income	Membership Dues
2023	€1,475k	€1,471k	+€4,514	€268k
2024	€2,548k	€2,506k	+€42,628	€284k
2025	**€3,829k**	**€3,789k**	**+€39,211**	**€291k**

ATIBT's budget has increased from €1,475k to €3,829k. This growth in scale is driven almost exclusively by the expansion and diversification of our project portfolio, while the membership dues base has grown linearly **by 8.5%** in absolute terms.

Thanks to these successive surpluses, the association's equity reached **€213,783** as of December 31, 2025. This financial cushion proves invaluable for navigating with confidence a transition period marked by the completion of several major contracts and a schedule in which most new operational implementations are expected to take place in the second half of the year.

ACKNOWLEDGMENTS

In addition to the donors mentioned above, ATIBT would also like to thank the various African and European authorities with whom frequent exchanges took place throughout 2025. We would therefore like to thank MINFOF (Ministry of Forests and Wildlife of Cameroon), MEF (Ministry of Forestry Economy of the Republic of the Congo), COMIFAC (Central African Forest Commission), the Ministry of Water and Forests of Côte d'Ivoire, the MTES (Ministry of Ecological Transition and Territorial Cohesion) and MEAE (Ministry of Europe and Foreign Affairs) in France, as well as many others who have assisted ATIBT in its work. We must not forget our members, who are the very lifeblood of our association.

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www.afd.fr

COMIFAC
Commission des Forêts d'Afrique Centrale
+237 6 91 49 25 61

Commission Européenne
Délégation de l'UE à Brazzaville

Délégation de l'UE à Yaoundé

EFI (European Forest Institute)
FLEGT and REDD Facilities
Tél +34 6 73 27 28 02
www.efi.int

FAO (*Organisation des Nations Unies pour l'Alimentation et l'Agriculture*)
Tél +240 22 20 55 416
www.fao.org

FFEM (Fonds Français pour l'Environnement Mondial)
Tél +33 (0)1 53 44 32 78
www.afd.fr

GIZ (*Deutsche Gesellschaft für Internationale Zusammenarbeit (GIZ) Gmb)*
Tél +49 61 96 79 12 82
Fax +49 61 96 79 73 33
www.giz.de

Initiative pour la forêt de l'Afrique centrale (CAFI)

KfW (*Kreditanstalt für Wiederaufbau*)
Tél +49 69 74 31 4090
www.kfw.de

OIBT (*Organisation Internationale des Bois Tropicaux*)
Tél +81-45-223-1110
Fax +81-45-223-1111

MTES
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www.ecologique-solidaire.gouv.fr

PPECF
Programme Promotion de l'exploitation certifiée des forêts
Tél : +237 6 70 66 85 16
www.ppecf-comifac.com

This new annual report was produced by the ATIBT team, with contributions from various partners, primarily the chairs of our association's committees and the Scientific Council.The layout was designed by JOConseil. We extend our warmest thanks to all of them.

atibt
THE LEADING AUTHORITY ON TROPICAL TIMBER

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