



ASSOCIATION SURVEYS FOR KNOWLEDGE (ASK)

LATIN AMERICA

(Summary)



Prepared by GTF

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This Survey seeks to better understand the challenges faced by forest and wood-based industry and trade associations around the world. The responses from associations in Asia, Africa, Europe and South and North America will inform GTF's, and our project partners, knowledge about the skills and capabilities of associations and identify future support programmes particularly focused on priority countries.

The survey was developed in collaboration with our project partners: FAO (Food and Agriculture Organisation of the United Nations) and WRI (World Resources Institute). The survey results are anonymised and non-attributable except at regional level.

The 21 associations surveyed draw their membership from almost all the Latin America and the Caribbean countries. Their geographic reach includes national and subnational coverage. Together, the associations represent a combined membership of approximately 1,500 members. Almost 20% of the membership comprises micro enterprises, and over 60% are small and medium size enterprises. The average annual operating budget of the associations is \$176,000 USD per year.

Associations provide a wide variety of services to their members, ranging from representation and stakeholder engagement to trade promotion and general business management support and a mix of technical services and support on a variety of matters including forest and product legality, transportation and logistical services, as well as quality services. The provision of government liaison, policy services and market promotion services are perceived to be of the highest priority for the associations' members. A significant challenge for the associations to deliver services to their members is related to political instability - policies, staff and political priorities often change with new administrations.

Policy and government relationships are also perceived to be the most significant factor affecting the associations' membership, followed low profitability and access to finance which is linked to limited capacities to run efficient and competitive operations. For some of the associations' memberships the reputation of the forest sector that it is perceived as often illegal, corrupt, or unsustainable further deteriorates their ability to trade in markets with legality and sustainability requirements.

The majority of the associations' members trade in the domestic and Latin America and Caribbean markets; some members aspire to expand to European, US and Middle East and Australian markets while a considerable amount of associations are not considering market expansion. Overall, the international markets –particularly European and the US but potentially increasingly the Chinese and Brazilian markets—are more sensitive to sustainability and legality concerns, while domestic markets are more lenient.

The full report is available upon request. Please contact GTF at: ASK@gtf-info.com



FAO - EU FLEGT PROGRAMME



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