Danida

MEMA - Natural Woodlands Management Project Iringa, Tanzania

Marketing Survey and Marketing Strategies

May - June 2000

COWI **in association with**
Danish Forestry Extension
Regulus Consult

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Report no.	1
Issue no.	1
Date of issue	2000-08-01

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List of Abbreviations

AA	Administrative Advisor
DBO	District Bee-keeping Officer
DGO	District Game Officer
DNRO	District Natural Resource Officer
FDB	Forest and Bee-keeping Division
MBOMIPA	Wildlife management project
MEMA	Name of the project
SWOT	Strength Weaknesses Opportunities and Threats
TA	Technical Advisor
Tshs	Tanzanian shillings

1 Introduction

The team conducting the marketing consultancy was composed of the following consultants:

- Karsten Raae, Team Leader / Marketing Specialist and Forester
- Paul K.S. Minja , Agricultural Economist
- Henrik Buhl, Forester

The team would especially like to express it's thanks to Henrik Lerdorf, TA, Tina Hanson, AA and Ester Mwakalile, Community Development Officer and Forest Assistant for playing a very active role in the teamwork.

The team has only focused on the Natural Woodlands Management part of the MEMA project. This means that this report contains no information on resources and marketable commodities from the Udzungwa Mountains part of the MEMA project.

From the very beginning it was made clear that focus by the marketing consultancy would be on products with an existing or noticeable commercial potential - being able to generate an income in the villages. Hence, special attention has been paid to the description of the chain of trade and prices at different stages on this route. The identification of both near by and more distant markets has been of equal importance.

2 Terms of Reference and Expected Outputs

At the briefing meeting at the DNRO office the preliminary set of Terms of References were discussed and adjusted to the following expected outputs of the consultancy:

- Identification of existing commercial or potential commercial natural woodland products;
- Description of market logistics. Distribution systems - how buyers and sellers get in contact as well as market constraints,
- Identification of potential customers and if possible segmentation of customers based on their willingness and ability to buy;
- A product related demand analysis;
- Identification of potential or existing competitors. Examination of the possibility to turn them into co-operation partners;
- Propose measures for quality control and monitoring;
- Evaluation of the idea of introducing a MEMA certification concept for natural woodland products;
- Formulate a marketing strategy and elaborate a Marketing Action Plan;
- Provide input to the ongoing debate on improvement of the system for collection of Royalties and Cess.

3 Methodology

The team had access to comprehensive information compiled in amongst others the following reports (please refer to annex 7, Literature):

- Socio-economic Baseline Study, MEMA, December 1999;
- Non-wood Forest Product Baseline Survey, MEMA, April 2000 and
- Forest and Vegetation Baseline Study, MEMA, May 2000.

Interviews in villages taking part in the MEMA project as well as a range of other villages have been carried out.

Markets have been visited. Equally have major producers and consumers of both wood and non-wood products from the natural woodlands - Miombo (please refer to Annex 5 - Meetings and List of People Met and Annex 6 - Itinerary).

Key informants from the DNRO office like the District Game Officer, the District Forest Officer, the District Bee-keeping Officer and the District Fishery Officer have been consulted. So has staff from the MBOMIPA project, staff in the Ruaha National Park, The Friends of Ruaha Society, individual resident hunters, tobacco growers and fishermen at the M'tera dam.

The team has focused particularly on having quantified the commercial markets for the products in the municipality of Iringa but also on identification of more nearby markets especially in the Nyang'oro area.

Local use of natural resources from the Miombo forest has been dealt with. Focus has been on the households' consumption of fuel-wood. From a strict commercial point of view this is of little interest. As input to decisions related to the sustainable management of the resources it is on the other hand of major importance, since it influences on the volume of products that could be harvested for sale on other markets. Only the situation in the villages being part of the MEMA Natural Woodland Management Project has been analysed.

Considerable effort has been put into verifying and calculating market prices on the products (please refer to Annex 4, Price Setting). Conclusively, two sets of prices have been identified / established, the producer price – sales price in the villages, and the consumer price at the market, mainly in Iringa. These prices are in general without levy (please refer to annex 1, Product Sheets).

Potential competitors both in the form of villages outside the MEMA area and the bigger commercial enterprises dealing mainly with wood products have been identified and examined with exception of competitors from the Udzungwa Mountain area.

The royalty / levy collection system has been checked at a road block.

Products from the Udzungwa Mountains Forest – their way to the markets, production capacity etc. have not been dealt with. The team considers this as a weakness of the market survey especially taking into consideration the future improved possibility to market products from the area due to the construction of a new road.

4 Product – Mix

Based on the recent baseline surveys and the findings of the team the following list of products with a certain commercial potential has been prepared. The products could be divided into the following groups:

Product groups:

Wood products	**Wildlife (game)**	**Non-wood products**
Fuel-wood*	Hunting:	Bee products:
Charcoal*	Residents	Honey*
Poles	Tourists	Wax
Timber:		Propolis
Softwood:	Game products:	
Round	Meat	Mushrooms*
Sawn	Trophy's	Baobab fruit (obuyu)
Hardwood:	Hides	Water
Round		
Sawn*	Handy-crafts of:	Others
	Horn / bone	
Carvings	Hides	
	Tourist facilities	

Detailed descriptions of the most promising products (marked in the table with *) are found in Annex 1, Product Sheets. For each of the products basic information on suppliers, production, customers, demand and prices are provided. Their chain of trade is illustrated and a SWOT analysis has been elaborated for every product focusing on the villages as the producers and primary beneficiaries to any economic output of activities related to marketing of the products.

Brief comments to all the listed products are given below:

Wood Products

Fuel-wood

Fuel-wood is a low value and easily made product, which only can afford transportation over short distances. "Everybody can produce it - even illegally". Main consumption is local in the villages. The poorer households in Iringa municipality use fuel-wood for cooking and heating, tobacco growers for curing the tobacco and fishermen for smoking the fish. For the villages, maybe with the exception of those close to Iringa town and the Kitapilimwa Forest Reserve, it is of less present commercial interest. Supply can in a few years be boosted through establishment of small woodlots close to the consumers and the market in Iringa. As long as natural resources are present on common or state owned land the motivation for private investment in the establishment of woodlots seems to be very low.

Charcoal

Charcoal has a high calorific value compared to fuel-wood as well as compared to volume. Due to the processing of the fuel-wood value has been added to this product. Charcoal is the main source of energy for urban households. It can afford some transportation costs. Legal production is facing serious competition from illegal processing, and in the case of the villages in the project area, also to the fact that ownership and user rights are not handed over to other villages in the rest of Iringa rural district. Hence, licenses to burn charcoal in natural woodlands elsewhere in the District are issued and competing supplies arrive at the market from different sources. This happens mainly west of the town where the road leading to Ruaha National Park is in relatively good condition and where natural woodlands are still plenty. Well organised, charcoal might be an economic option for villages having access to the Nyang'oro Forest Range especially if illegal production can be reduced considerably. Handing over ownership rights to villagers in general seems to be the best way of coping with that.

Poles

Poles are mainly used locally. The market in Iringa Municipality is subject to competition from a large-scale production south of Iringa town in the plantations in the Mufindi and Dabaga areas making it unlikely that poles could be an economical interesting commodity for the villages in the near future.

Timber

The Miombo woodlands consist of hardwood species. Round timber is a simple relative low value product that can generally not afford high transportation costs save a few highly valuable species like Mninga, which already has been harvested in attractive dimensions to quite some extent in the Nyang'oro Forest Range. Softwood timber is produced in big quantities in the Dabaga and Mufindi areas. Pit-sawing is a simple process, which normally takes place on the harvesting site. The sawn timber can be made very accurate and in good quality if well maintained equipment is used and if the importance of quality is recognised by the producers. Sufficient value is added to the round timber after pit-sawing allowing quite some transportation costs to be added before the product is sold on the market. From an economical point of view sawn hard-wood timber seams very attractive for villages having access to the resources in the Nyang'oro Forest Range however resources are very few. Competition from contractors having licences to harvest and process in other areas and illegal harvesting should be considered.

Carvings

Wood carvings is a traditional Tanzanian handy-craft product. There is no local traditions for making carvings. The ones found for sale are made in the Njombe area. In some villages it was mentioned that the needed tree species were not available. This activity might be considered commercialised further if introduction of wood carvings and other handy-craft products like the household items presently sold on the market in Nyang'oro and/or other places proves to be worth while the effort.

Wildlife

Hunting

In the villages north of the Nyagoro Forest Range game was recognised as a product that might be interesting to focus on. The MBOMIPA project has had very good results with commercialising the hunting in the villages in the Idodi area where the number of game is big enough to allow issuing of hunting quotas. Although the game resource referring to existing surveys is more scarce north of the Nyang'oro Forest Range compared to the southern MBOMIPA area the combination with bird hunting and the closeness to the M'tera Dam (and maybe a minor change in land-use pattern) might attract both resident and tourist hunters. This is definitely an option that should be further investigated.

Game products

The resident hunters are mainly interested in the meat. They leave trophy's, hides, horns etc. in the forest - presently not utilised. Tourist hunters would go for the trophy's and hides and leave the meat for local consumption. Both resident and tourist hunters have the willingness and ability to pay.

Handy-crafts

Similarly to woodcarvings there is no tradition of using horns, bones, teeth's or hides from wild animals in the production of jewellery or other forms of handy-crafts. The Masais have the knowledge and skills concerning jewellery and are present in the area. Tourists are visiting nearby Ruaha National Park where the only souvenirs available are postcards and T-shirts. It might be possible to develop a market for different handy-craft products originating from the natural woodlands.

Tourist facilities

Besides the bars along the Dodoma road and a few basic rest houses no tourist facilities are available north of the Nyang'oro Forest Range. The M'tera Dam and Ruaha National Park could provide good opportunities for development of tourism. For the time being only around 6,000 visitors enters the Park annually of which 2/3 are none residents. The opening of a second gate to the park near the village of Kisanga would link the park and dam and thereby making it attractive and possible for the MEMA villages to get a share of the tourist market. Basically this will depend on the tourist policy of the Park.

Non-wood products

Bee products- Honey

According to the villagers it will be possible to increase the honey production significantly. This correspond with the FBD, 1998, saying that the actual national production of honey and beeswax is less than 4% of the existing potential. The constraints to an increase in production are mainly: Lack of ownership, lack of use of improved beehives and a limited market for beeswax

The beekeepers or collectors of wild honey produce all honey. The honey is either used by them selves or sold. Nearly the whole production is consumed within the villages. The main part is used as comb honey for beer brewing. There is an insufficient (or unknown) market for beeswax. The actual market for other bee products seems small.

The demand for honey outside the villages is high. Hence, competition should not be a problem in the years to come.

Production of more efficient beehives can be established locally. Straining of honey, rendering of beeswax and storage of honey can be introduced at low costs. Knowledge is present in the country.

Mushrooms

Mushrooms are mainly consumed locally. From the Kitampilimwa area a smaller amount is sold on the market in Iringa. Processing like drying and pickling is practically not done. The product is of minor present economic importance and potential but might be developed.

Fruits

Most fruits are consumed locally, some like *obuyu* (Baobab) are sold on the local markets. Markets exist in Iringa and other towns, even in Dar Es Salaam. These markets are not supplied and it is doubtful whether it is an option that could generate a noticeable income to villages.

Water

The team visited the water plant west of Iringa town owned by a tobacco grower. The plant has sufficient supplies of high quality water and is established on the top of the sources. Hence, it is not for the time being considered an option for the villages in the Nyang'oro area to try to be engaged in water production even if investigations would show a production potential of sufficient high quality. In a more distant future this might be worth while looking into since the water market probably will develop vigorously in the years to come. Rumours say that salty water has been discovered in the area.

Others

The Non-wood Forest Product Baseline Survey mentions a variety of other products like medical herbs, grazes, seed, minerals etc. All are to the vast extent consumed or used locally and hence considered being of no significant economic interest. Gum from *Acacia Senega*l has been mentioned from time to time. Sales records from National Tree Seed Programme (NTSP) show an interest for this product in the region. It might be worth while to investigate possibilities for establishing a commercial production. Intercropping with e.g. sorghum is possible. There exists a big international market for gum arabic.

5 Market Logistics - Supply

If there is a market it's most likely that the commodities will find their way to it if the price is attractive enough – legally or illegally. The markets identified below are supplied and demand is fulfilled - mostly through more or less accepted illegal trade. This situation makes the markets for especially the wood product from the natural woodlands very intransparent and prices somehow arbitrary figures.

The potential supply of wood-products from the villages could be estimated as follows based on The Forest and Vegetation Baseline Study:

The yearly increment in the Nyang'oro area equals 1.2 m^3/hectare corresponding to a total of 43,500 m^3 of wood from trees with a breast height diameter greater than 10 cm and 72,500 m^3 of wood from trees with a breast height diameter greater than 2 cm.

The yearly increment in the Kitapilimwa area equals 0.9 m^3/hectare corresponding to a total of 3,500 m^3 of wood from trees with a breast height diameter greater than 10 cm and 5,800 m^3 of wood from trees with breast height diameter greater than 2 cm.

It is not recommended to harvest more than one m^3 over the size of 10 cm per hectare. In order to secure sustainability the harvesting should be spread over the whole area. This leaves a potential sustainable production of approx. 58,500 m^3/year in Nyang'oro and some 5-6,000 m^3/year in Kitapilimwa of wood from tress with a breast height diameter greater than 2 cm.

It should be noted that the survey assesses that the increment at present is only at a level of 40% of the potential due to the utilisation pattern.

The wood based products sold in Iringa are brought to the market in different ways:

- Registered traders with licenses that pays levy. They transport charcoal, sawn timber and to some extend fuel-wood on trucks or pick-ups. Except for sawn timber of softwood they only serve a smaller part of the market.

Illegal trade is widespread both in smaller and bigger quantities of mainly charcoal and pit-sawn hardwood timber. Road blocks and levy collection is not efficient and apparently not meant to be. On top of this the amount of levy to be paid is "of course" negotiable.

- Hardwood timber is to some extent sawn in dimensions fitting into busses and then transported to Iringa or picked up at night by middlemen bringing the timber to the markets;

- Charcoal is from nearby sources brought to Iringa in 100 litre bags on bicycles, busses or on pick-ups organised by middlemen as "night trading";

- Fuel-wood is carried to town in head-loads or on bicycles every morning and evening from nearby sources. These are for the main part strongly depleted. Apparently the fuel-wood is delivered directly to the consumers.

Other natural woodland products are not subject to payment of levy or licenses to harvest. Hence, the trade with fruits, honey, mushrooms, grazes etc. occurs on an open and transparent market where a real price is set based on supply and demand and where the producers in general themselves bring their products to the markets, whether these are within the village, in neighbouring villages or in Iringa. Traders from Iringa also purchase on local markets. For more detailed information please refer to Annex 4, Price Setting.

6 Market Size - Potential Customers

The team has estimated the size of the market in Iringa municipality. So has local consumption in the villages (please refer to Annex 1, Product Sheets). The key figures are noted below:

Households using charcoal as main source of energy uses approx. 7 litres per day.

Households using fuel-wood uses 2-3 head-loads per week. (Please refer to Annex 2, Calculation Factors)

The team has identified the following potential or existing customers within Iringa municipality. Their demand has been estimated:

Demand / Customer	Fuel-wood m^3	Charcoal m^3*	Sawn hardwood timber	Honey	Game products
Households	41,000	90,000		High	
Public Institutions	2,180			¤	
Big tobacco-growers	10 - 15,000				
Small tobacco-growers	2 – 5,000				
Brick burners	8,000				
Wholesalers			What could be supplied	¤	
Bars and restaurants		11,000		¤	
Resident hunters					Interested in more
Tourist hunters					Interested in more
Tourists					¤
Others		2,000		¤	
Grand total	**63-70,000**	**103,000**			

* The figures show the number of solid m^3 needed to produce the amount of litres of charcoal consumed.

¤ Demand definitely exists but has not been estimated.

It is evident that household consumption of fuel-wood and charcoal is by far the most important markets. Consumption is growing due to increase in population. The products fulfil basic needs and the demand will tend to be met no matter what regulations will be put on management of natural resources. If the production potential in the Miombo woodlands is not able to fulfil the demand under a sustainable management scheme the resources will simply be exhausted.

Local markets

Along the shores of the M'tera Dam many households are engaged in smoking fish. The nearby villages supply this market with fuel-wood. The demand, based on interviews in the fishermen's camps and in the Villages, has been estimated to be 10.000 m^3 per year including household consumption of fuel-wood for cooking. Brick burners in the area of Izazi and Migole village use a noticeable amount of fuel-wood provided by their fellow villagers. These two local markets accounts for about 20% of the recommended harvest of wood in the Nyang'oro Forest Range.

On local markets in the Nyang'oro area some trade with forest products like charcoal, honey and mushrooms occur. Especially the market in Nyang'oro village draws some attention, since traders from Iringa are purchasing at this market.

7 Price Setting

The issue of price setting has been dealt with intensively by the team and it is considered a major constraint on the market. Mainly due to the illegal trade, which as mentioned earlier is widely accepted by the authorities. The system of levy, licences to harvest and lack of recognised ownership rights encourage people to produce and harvest illegally - altogether making the market for core woodland products like charcoal, fuel-wood and pit-sawn hardwood timber highly intransparent. Hence, the team has decided to deal with the price setting issue more detailed in Annex 4. This annex is basically a compilation of all information gathered on prices and to some extent distribution.

Prices are in general found to vary according to:

- Distance from production site to market;
- Road conditions;
- Seasons;
- Degree of legality of production and;
- Degree of legality of trade.

This is very much the same for all wood products from the natural woodlands and most explicit for charcoal.

In the Products Sheets (Annex 1) findings on producer prices in the villages and market prices – the price paid by the end user has been determined. The gap between the two sets of prices could be used in the villages as a point of departure for negotiations and description of their bargaining power towards e.g. middlemen. How much room is left for profit sharing or having a bigger piece of the cake returned to the villages.

8 Competitor Analysis

The marketing team has visited the areas and villages west, southwest and southeast of Iringa in order to identify other areas of major production of commodities from natural woodlands. Focus has mainly been on charcoal, fuel-wood, sawn timber and honey.

- Licensed charcoal production takes place in the Idodi area where natural woodlands are less depleted than in the vicinity of Iringa. Also illegal production takes place here. A production potential exists for fuel-wood and charcoal in the Idodi area;

- The Mufindi area - Sao Hill sawmill and other timber producers can easily supply the Iringa market with sawn softwood timber and poles;

- In the Dabaga area both a legal and illegal production of high quality Black Wattle charcoal take place in considerable quantities supplying the market in Iringa and probably other markets as well.

- Likewise in the Dabaga area there is a production of pit-sawn softwood (Pine) and hardwood (Eucalyptus). The latter might be considered as competing with hardwood supplies from Nyang'oro Forest Range;

- Poles are easily supplied from Dabaga;

- Honey is produced in both traditional and improved beehives west and southwest of Iringa town. The major part is used for local brew. Supplies do not satisfy the total demand for honey.

The demand at the market in Iringa for fuel-wood, charcoal and pit-sawn hardwood timber probably exceeds the sustainable production capacity of the nearby natural woodlands. This means in principle no real competition amongst suppliers. Illegal trade opposes competition on legal trade and lead to over utilisation of the resources close to the town.

In the long run prices will rise and supplies from Nyang'oro Forest Range might even be able to compete with illegal trade despite of the transportation costs that have to be added to the price of the products before they arrive at the market.

9 Conclusions

Analysis of the market shows that four products are by far the most important from marketing point of view, namely:

- fuel-wood;
- charcoal;
- pit-sawn hardwood timber and
- honey.

Production potential exists for all four products and especially for honey. Potential of wood products differs considerably in Kitapilimwa and Nyang'oro.

Demand is in all four cases high and in general there exist both willingness and ability to buy except for fuel-wood which mostly is gathered by and consumed in the individual households.

Sustainable management plans accepted and understood by all villagers are considered a precondition for a successful utilisation of the resources including dealing with grazing rights.

In terms of wood products the Kitapilimwa area is not even able to cover own consumption needs for fuel-wood used in households and for tobacco curing in a sustainable way. The Forest Reserve simply need a period of rest to recover. It should be mentioned that there is still a minor resource of fuel-wood on village owned wooded farmland. Immediate marketable, hence income generating products, seems to be limited to honey and maybe beeswax and propolis.

Supplies of fuel-wood to Kitapilimwa are probably needed from outside but then have to be paid for.

Fuel-wood can still be sold from the Nyang'oro Forest Range based on sustainable production.

If possible within the framework of the project it is suggested to find a model for fuel-wood supply to Kitapilimwa and for the financing of supplies from either Nyang'oro or the resources in the plantations in the Dabaga and the

Mufindi area. Introduction of energy saving techniques should be considered as well. At the same time more wood lots for production of fuel-wood should be established on village land. A model could be new forests consisting of a number of compartments corresponding to the number of households in each village. Each household should be given well defined rights of ownership and use to their own compartment in the new forests. Eventually support to fuel-wood supplies has to be limited to a short period of time of about 2-3 years. Then the harvesting level in the Forest Reserve could be raised a little and the woodlots will hopefully start to produce.

In terms of wood products the villages in the Nyang'oro area consume less fuel-wood than the yearly increment in the forest and on the wooded farmland. They supply the fishermen's camps with fuel-wood for smoking of fish. When these two types of needs are fulfilled approx. 50% of the yearly increment in the forest will be accounted for. That leaves some 25 - 30,000 m^3 for additional sale per year. Parts of Nyang'oro Forest Range are on steep slopes an are not easily accessible. Sustainable management is based on a relatively even distribution of harvesting over the whole area. If areas are counted out of production due to remoteness or difficult terrain the potential marketable production drops.

The approx. 25,000 m^3 could be used for production of fuel-wood, charcoal and timber for sale according to the most needed agreements on management that the project has to establish with the villagers (new owners of the forest).

Timber is by far the most economically interesting wood product. The number of trees that could be harvested is limited and the resource could easily be exhausted. The future possibilities to expand harvesting exist if proper management schemes are introduced.

For more detailed suggestions related to marketing of the products, please refer to the Marketing Action Plan, which should be finalised together with the villagers as a part of a set up for sustainable management plans.

From a short term perspective honey is the most promising of the products. High in demand, high production potential, relatively high value and room for improved production methods. In the Kitapilimwa area the closeness to the market in Iringa is another advantage.

It is recommended to take immediate action on the honey issue. There seems to be quite a lot to gain in adding value to the product and by co-ordination of both production and distribution. Linking these activities could secure a higher income in the villages.

Production from the Udzungwa area has not been dealt with during this marketing consultancy. The team has no idea of which products are or could bee produced and in which quantities from Udzungwa. The question is: Will it have any influence on the markets? Hence, it is recommended to do a brief market survey on products from Udzungwa Mountains.

10 Gates – Taxation – Royalties – Cess

The existing methods of collecting different kind of taxes have proved to be ineffective.

Before introducing a new taxation system it is crucial to define the size of the wanted revenue to the District.

It might be possible and interesting to introduce a new taxation system in the MEMA project area. Advantages should be related to a new taxation system like having quotas for harvesting of Mninga. The system could be based on the findings of the Forest and Vegetation Baseline Survey. Quotas for hunting game are another incentive that could be given to some of the villages. It could also be suggested to try to make charcoal burning a respected profession. Charcoal is needed by nearly everybody and the market is huge. – In general life should be made easier for people who have paid their tax.

It is important to be aware of the potential problems that a dualistic taxation system can create especially if only one way of collection is possible to fully control. Competition from illegal harvesting in other areas can be so hard that it does not pay of for the villages. Taxed production must be able to compete.

It might be an idea to introduce a system independent of production. That would make products from the project area able to compete with illegal production. Then only other factors like transportation costs will have influence on the product success in the markets.

One suggestion could be a form of land taxation. This could go along with the handing over of ownership and users rights. The problem is that a tax which is not linked to production could lead to an overexploitation – "we pay anyway". It is the production that typically offers people an opportunity to earn an income hence providing the ability to pay.

The solution might be somewhere in between. For instance a very light land taxation and quotas for different products based on the plans for sustainable management. Inspiration could be found in MBOMIPA's game management schemes.

Outside the project area it might be an idea to consider lowering the levies and enforce control in order to get at least the same revenue. It is recommended to go for the bigger guys they can pay (and bribe). Again to make sure that the system makes life easier for those who have paid their taxes.

11 Observations – Lessons Learned – Strong Statements (for internal use)

The team hereby passes on impressions / observations gathered during the market survey. The statements are not limited to marketing issues but are all supposed to be of general interest to MEMA. Not all observations have been verified by the team.

- There is a desperate need for having official proof of the new ownership and users rights;
- Transportation costs are in general extremely high;
- Great need for knowledge about market possibilities and products in demand;
- Great need for understanding the economic importance of adding the maximum value to the products through further processing and improvement of quality;
- Need for co-ordination of production, transport (distribution) and sales of the products;
- Levy is considered a negotiable issue;
- Need for legalising all sustainable production related to the natural woodlands;
- Need for more specialisation amongst producers;
- Potential for mass production of fuel-wood, and charcoal;
- Villagers seem not used to take initiative or be very innovative. They are waiting for some one to take action on their behalf, hence change of attitude is needed;
- The Miombo seems to be a robust forest type – left to rest it will recover;
- Rights to graze livestock in the natural woodlands have to be dealt with.

At this stage of the project sufficient information seems to have been gathered. Now action is needed.

12 Marketing Action Plan 2000