



FOREST SECTOR  
CHARTER COUNCIL

**STATUS OF TRANSFORMATION  
IN THE  
FOREST SECTOR  
2010-11**

A Document Prepared for:

**Forest Sector Charter Council**

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## **1. INTRODUCTION**

### **1.1 Background**

The Forest Sector Charter Council is tasked, inter alia, with the evaluating and monitoring of transformation in the forest sector. The forest sector comprises the following sub-sectors:

- Forestry (plantations)
- Contracting
- Pulp and paper
- Sawmilling
- Mining timber
- Board production
- Chipping plants
- Poles
- Charcoal production.

A first (benchmark) report on the transformation status of the sector was produced in July 2010. Subsequently, LHA Management Consultants (LHA) was again approached in early 2012 to produce an updated report, with results for the financial year 2011. This report assesses the results for FY2011, with comparisons to the first benchmark study.

### **1.2 Research Methodology**

During the first research study, a comprehensive database of forest sector enterprises was compiled, and this database was updated particularly in respect of relevant contact people and contact details for each of the enterprises. Enterprises were subsequently requested to submit to LHA valid B-BBEE certificates for the period covering April 2010 to March 2011. The results provided in this report are based on the scores per element as recorded on the certificates, with no further details on changes (either positive or negative) within specific elements.

Although some gaps still exist regarding sub-sector coverage, e.g. limited information could be obtained on charcoal producers and wood chip exporters, we believe that the information is sufficiently representative to provide a good picture of the status of transformation in the forest sector over this period. Also, it should be noted that some enterprises, e.g. the large pulp and paper companies and sawmilling groups supplied one scorecard covering all their operations. In the case of Sappi and Mondi, for instance, it covers plantation forestry and pulp and paper production, and in the case of large sawmilling groups, e.g. York Timbers and Singisi. Forest Products, both sawmilling and plantation activities. In our assessment we have allocated the scorecard rating to both the two major activities, e.g. in the case of Sappi and Mondi, to plantation forestry and pulp production, as they are major players in both sub-sectors.

## 1.3 Reporting

Chapter 2 presents an overview of the forest sector in terms of the relative sizes of the various sub-sectors and the composition of each sub-sector in terms of small, medium and large enterprises. In addition, information on the coverage in terms of scorecards received for each sub-sector is indicated. It is thus possible to obtain a weighted average for the total sector but also some detail for the sub-sectors and specific categories within each sub-sector.

In Chapter 3 the transformation status of each of the sub-sectors is described, together with an analysis of the composition of the scorecard in terms of the various elements. Chapter 4 provides a summary of the current status of transformation in the forest sector.

## 2. FOREST SECTOR STRUCTURE

### 2.1 Sector Weightings

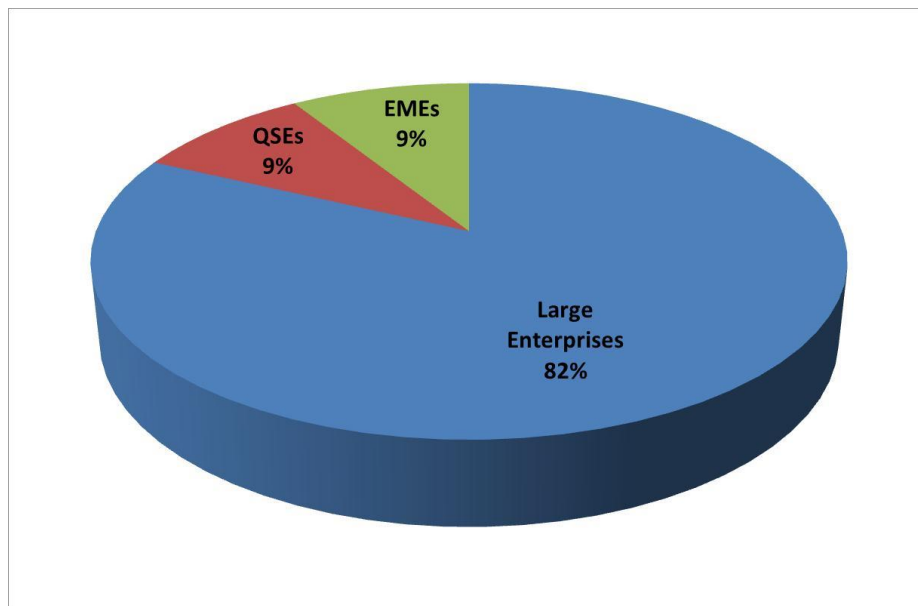
Based on production output, the contribution of large enterprises, qualifying small enterprises (QSEs) and exempted micro-enterprises (EMEs) across each sector is shown in the table below, as well as the contribution of each sub-sector within the total forestry sector. These weightings are used to present an overview of transformation in the sector as a whole.

Sector	% Within Sector (→)			% of Total Forest Sector (↓)
	Large	QSE	EME	
Forestry	70%	12%	18%	18%
Board Production	100%	-	-	7%
Chipping Plants	100%	-	-	5%
Contractors	49%	35%	16%	8%
Mining Timber	90%	10%	-	2%
Pole Treaters	25%	50%	25%	2%
Pulp and Paper	100%	-	-	40%
Sawmilling	65%	16%	19%	15%
Charcoal	60%	-	40%	3%
<b>TOTAL</b>	-	-	-	<b>100%</b>

The enterprises that make up the bulk of production output in each sub-sector are shown below.

Sector	Structure
Forestry	<p>Nine large groups</p> <ul style="list-style-type: none"> <li>• Mondi Forests</li> <li>• South African Forestry Company</li> <li>• Yorkor</li> <li>• MTO Forestry</li> <li>• Masonite (Africa)</li> <li>• Sappi Southern Africa</li> <li>• Komatiland Forests</li> <li>• Hans Merensky Holdings</li> <li>• Amathole Forestry Company</li> </ul> <p>Balance medium/small timber farmers</p>
Board Production	<p>Three large groups</p> <ul style="list-style-type: none"> <li>• PG Bison</li> <li>• Masonite (Africa)</li> <li>• Sonae Novobord</li> </ul>
Chipping Plants	<p>Three large groups</p> <ul style="list-style-type: none"> <li>• NCT (Shincell)</li> <li>• Mondi (Silvacell)</li> <li>• TWK (CTC)</li> </ul>
Contractors	<p>Estimated 300 forestry contractors</p> <ul style="list-style-type: none"> <li>• 150 Medium and some large enterprises</li> <li>• 150 EMEs</li> </ul>
Mining Timber	<p>Two large groups</p> <ul style="list-style-type: none"> <li>• Reatile Timrite</li> <li>• Bedrock Mining Systems</li> </ul>
Pole Treaters	<p>Small number of larger companies</p> <ul style="list-style-type: none"> <li>• Woodline Timber Industries</li> <li>• Harding Treated Timbers</li> <li>• Natal Forest Products</li> </ul> <p>Balance very fragmented industry</p>
Pulp and Paper	<p>Two large groups - Sappi and Mondi</p>
Sawmilling	<p>Total of 250 operating sawmills</p> <p>Large sawmilling groups</p> <ul style="list-style-type: none"> <li>• York Timbers</li> <li>• Hans Merensky Holdings</li> <li>• Cape Timber Resources</li> <li>• Komatiland Forests</li> <li>• Rance Timbers</li> <li>• Sappi</li> </ul> <p>Balance medium sized and small sawmills</p>
Charcoal	<p>Three larger producers</p> <ul style="list-style-type: none"> <li>• E&amp;C Charcoal</li> <li>• Charka</li> <li>• Braai &amp; Barbeque International</li> </ul> <p>Balance very fragmented industry</p>

In summary, the contribution (in terms of output) of large enterprises, QSEs and EMEs in the whole forestry sector is shown below.



Large enterprises in the forestry sector are represented principally by pulp & paper (40%), large forestry (13%), large sawmills (10%) and board producers (7%).

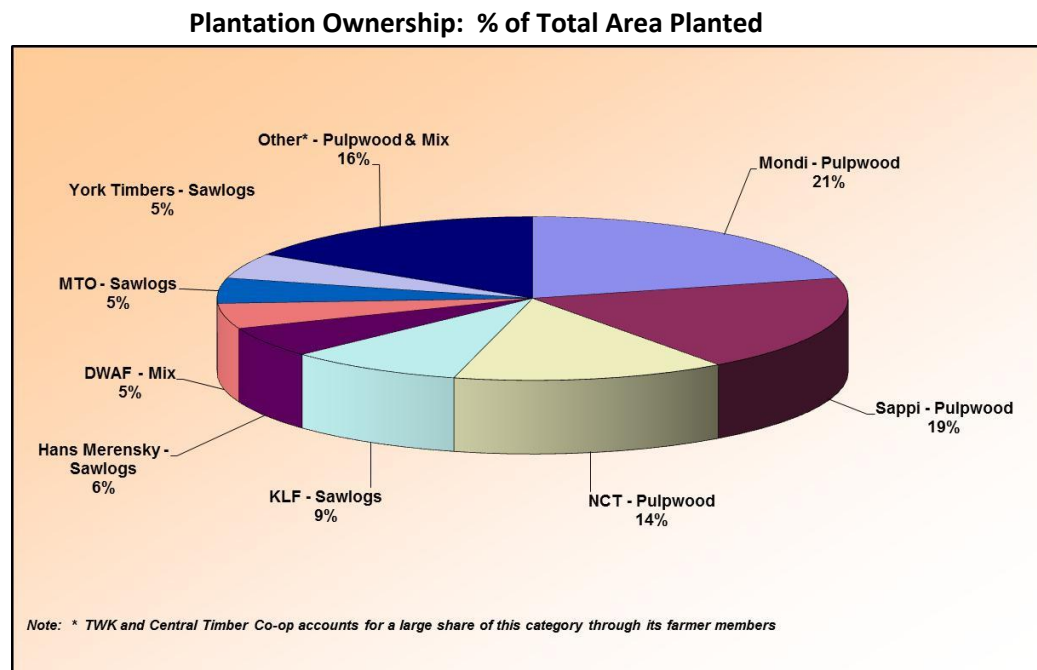
QSEs are mostly represented by timber farmers, forestry contractors, sawmills and pole treaters.

EMEs comprise small timber farmers, contractors, charcoal producers, pole treaters and sawmills.

One of the key characteristics of the forest sector is the extent of vertical integration. About 90% of plantation output is consumed by primary processors belonging to the same companies or groups. For instance, a group like Sappi includes in their operations plantation forestry, pulp production as well as sawmilling. B-BBEE scorecards generally cover the total operation and are not split between various sub-sectors, e.g. sawmilling, plantation forestry or pulp and paper production.

## 2.2 Plantation Forestry

The South African plantation area is close on 1.4 million hectares. The large pulp companies and chip exporters have control over about 60% of planted hectares in South Africa. A breakdown is presented in the figure below.



Verified scorecard data has been obtained from the following enterprises:

- Mondi
- Sappi
- Komatiland Forests
- Hans Merensky
- MTO
- York Timbers
- Masonite
- South African Forestry Company (Safcol).

These companies together manage 65% of all plantations in South Africa. In addition, an estimated 20% of plantations are owned and managed by small independent farmers. Their output is marketed and distributed through various timber co-operatives. The bulk of these farmers produce timber valued at less than R5 million per year and would therefore fall into the category of exempted micro-enterprises.

## 2.3 Contracting

There are an estimated 300 forestry contractors active in the forest sector. Main activities include silviculture, harvesting and transport. Silviculture activities account for 30% of total turnover with the balance of 70% equally split between harvesting and transport operators.

The sub-sector employs 25 000 people. A large number of operations are controlled and owned by black people. It is further estimated that 40% of enterprises have an annual turnover of less than R5 million thus qualifying as exempted micro-enterprises (Level 3 and 4 contributors). A total of 7 scorecards in this sub-sector were received.

## 2.4 Pulp Mills

South African pulp mills consume an estimated 9.5 million m<sup>3</sup> of roundwood to produce pulp for paper and board manufacture and dissolving pulp. In addition to the roundwood intake an estimated 400 000 tons of chips is used annually.

The pulping mills using virgin wood fibre include:

- Sappi
  - Enstra
  - Ngodwana
  - Mandini
  - Saiccor
- Mondi
  - Richards Bay
  - Merebank
  - Piet Retief

The pulp and paper industry is a significant exporter. On a value basis exports account for about 35% of production. Scorecard information has been received from both Sappi and Mondi, resulting in full coverage of this sub-sector.

## 2.5 Sawmilling

South Africa has an estimated 250 operating sawmills. Seven large companies, which between them operate 19 sawmills, account for 65% of total log intake and production of sawn timber. A further 25 independently owned medium sized mills account for 16% of production and the balance by about 200 small and bush mills. Of the latter category it is estimated that about 80 mills are formal mills and the rest are bush mills/mobile mills.



Most of the large sawmilling groups provided scorecards. Few responses have been received from medium sized sawmills.

Most of the 125 bush mills and some of the smaller formal mills have an annual turnover of less than R5 million and would all be classified as exempted micro-enterprises. We estimate that at least 70% of small mills will fall into this category.

## 2.6 Chipping Plants

Chipping plants, located in Richards Bay and Durban, export Gum and black wattle wood chips to Japanese pulp and paper mills. The operators in this market and their estimated market shares are indicated below.

Parent Company	Plant	Market Share (%)	Location
NCT	<ul style="list-style-type: none"> <li>• Bay Fibre</li> <li>• Shincell</li> <li>• NCT Durban Wood Chips</li> </ul>	40	Richards Bay Richards Bay Durban
TWK	CTC	23	Richards Bay
Mondi	Silvacell	37	Richards Bay
<b>TOTAL</b>	-	<b>100</b>	-

The industry reached its peak roundwood intake in the middle 2000s and operated very close to full capacity at an annual intake level in excess of 6.2 million m<sup>3</sup>. This intake has subsequently dropped below 4 million m<sup>3</sup> mainly as a result of non-availability of timber in the local market and declining market demand by overseas pulp mills. Investigations are constantly underway to convert some of the chip exports to local pulp production. Scorecard information has been received from Mondi and NTC, resulting in a coverage of 77% of the sub-sector. TWK does not regard itself as part of the forestry sector, but rather the agriculture sector.

## 2.7 Board Products

The producers of wood based board products are PG Bison, producing MDF and chip board, Sonae Novobord (MDF and chip board) and Masonite (fibre board). The estimated market shares of producers are:

- Sonae Novobord                      32%
- PG Bison                                50%
- Masonite                                14%
- Other                                     4%
- **TOTAL**                                **100%**

PG Bison and Masonite submitted scorecards resulting in a coverage of 64% of this sub-sector.

## 2.8 Poles

This sub-sector consumes an estimated 680 000 m<sup>3</sup> of roundwood per annum, split about 50:50 between Gum and Pine. Of the total intake about 65% is treated whilst the balance is used mainly by the informal sector in untreated form for building and fencing purposes. Treated poles are produced according to SABS specifications as electricity transmission poles, telephone poles and building and fencing poles. About 65% of poles find application in the building sector.

We estimate that there are approximately 120 pole manufacturing establishments in South Africa. Of this about 80% are small (informal) enterprises, probably with an annual turnover of less than R5 million and accounting for about 25% of production. These are all exempted micro-enterprises. The 40 medium to larger enterprises/groups account for the balance (75%) of output. Larger enterprises/groups include:

- Woodline Timber Industries (part of PG Bison)
- Treated Timber Products
- Tzaneng Treated Timbers
- G-Worx Forest Products
- Vhuka Comondale Treated Timbers
- Harding Treated Timbers
- Vuka Khulani Timber Industries
- Lows Creek Treated Timbers
- Natal Forest Products
- Shefeera Timbers
- Flaxton Timbers.

## 2.9 Mining Timber

The sub-sector is dominated by two main players accounting for more than 90% of mining timber output. These are:

- **Reatile Timrite:** They have six mills in the northern Mpumalanga and Tzaneen area, and account for an estimated 40% of mining timber production.
- **Bedrock MS:** Bedrock Mining Systems was recently formed through a merger of Shanyala and SMT (Sappi Mining Timbers). The Shanyala Group operates mostly in the Piet Retief/Paul Pietersburg area and has five mining timber mills. SMT is active mainly in the Nelspruit, Barberton and Graskop area where it operates three mining timber mills. The group's market share is estimated at 50%.

The balance (10%) is produced by small independent mills and TWK which owns sawmills near Piet Retief and in Swaziland. Scorecard information has been obtained from only one enterprise, the other still in process to obtain a certificate.

## 2.10 Charcoal

About 50% of charcoal is consumed by ferrous industries where natural charcoal is used as a reducing agent. Major companies include Silicon Smelters, Rand Carbide and Siltech. They obtain charcoal from a vast network of small independent producers (about 50% of intake) and the balance from formal charcoal producers.

The household market accounts for 50% of total demand and is mainly supplied by formal charcoal producers. The major producers include:

- Charka Suiderland – Piet Retief
- Braai and Barbeque International - Gauteng
- E&C Charcoal – Pietermaritzburg
- Freidheim Timbers – KZN

The vast majority of small informal producers would have an annual turnover of less than R5 million and will thus be classified as exempted micro-enterprises. No scorecard information could be obtained from the formal charcoal producers.

### 3. STATUS OF TRANSFORMATION IN THE FOREST SECTOR (FY2011)

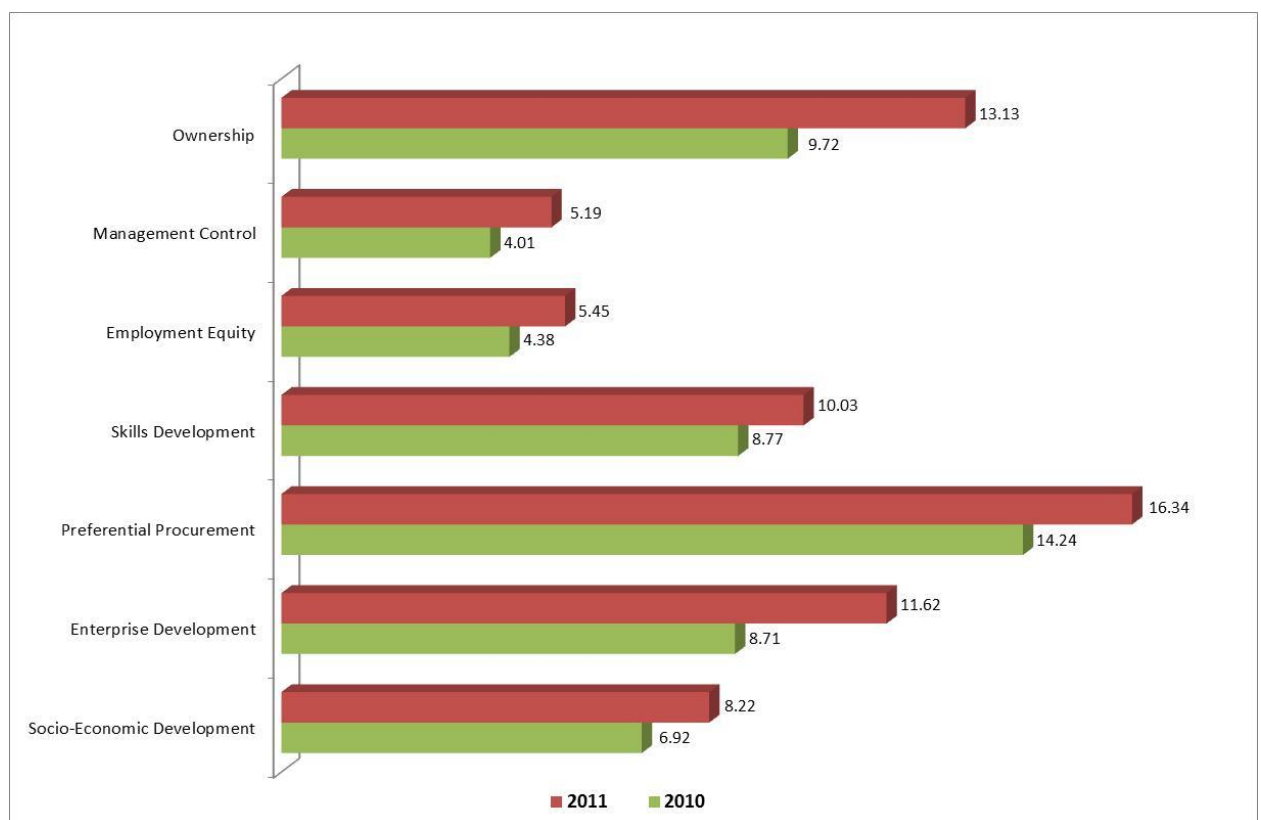
In the following sections the scorecard information obtained is presented to reflect the current FY 2011 status of transformation in the various sub-sectors.

#### 3.1 Large Forestry Companies

In 2011, total coverage of the large forestry sub-sector was achieved with all enterprises submitting data. This sub-sector shows improvement in scores in all seven elements, particularly ownership, enterprise development and socio-economic development.

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 70, up from 57 in the year before. This has resulted in an improvement to Level 4 from Level 5. Details are shown in the table and graph below.

Year	Total B-BBEE Score	B-BBEE Level
2011	69.96	4
2010	56.75	5

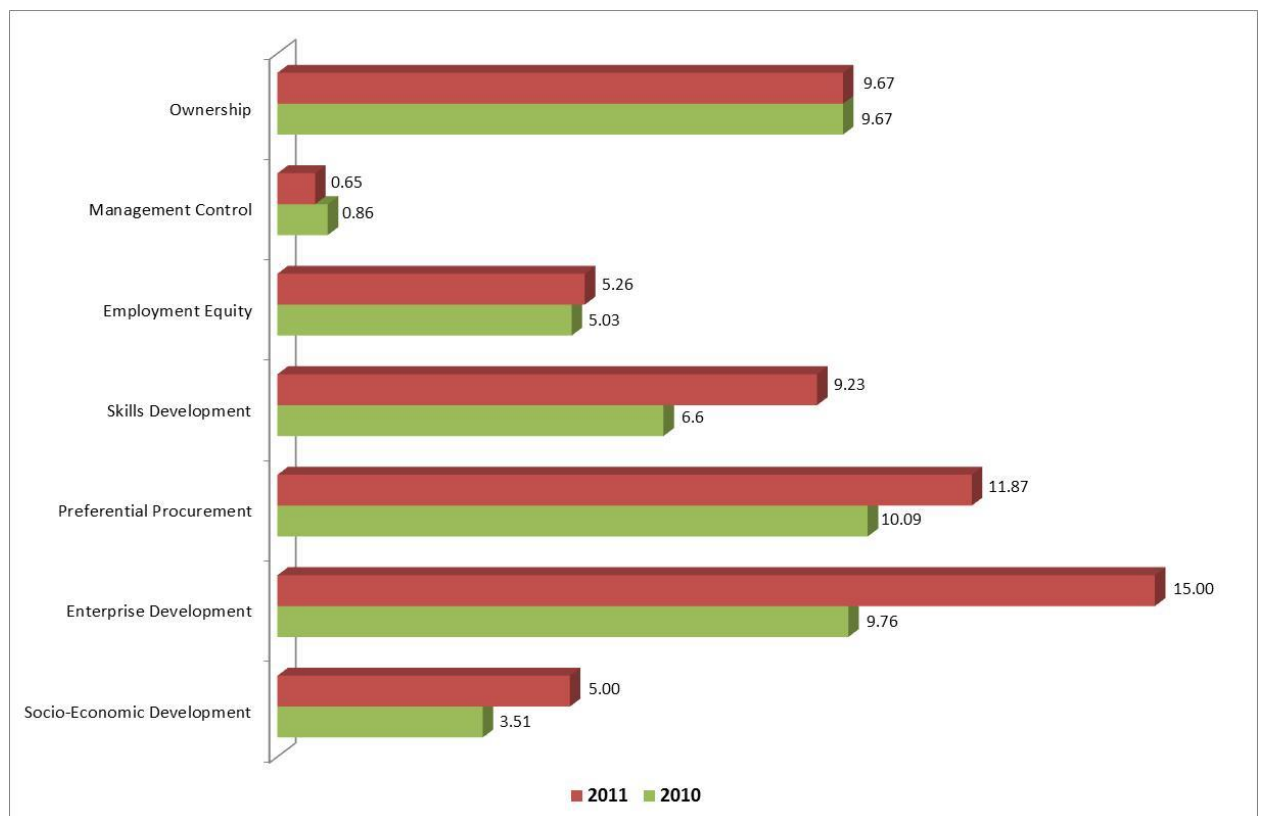


### 3.2 Board Producers

Data for 2011 reflects a partial coverage (64%) of the board products sector with data for one large enterprise outstanding. The data shows a comparison on a like-for-like basis, i.e. a constant sample.

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 57, up from 46 in the year before. This has resulted in an improvement to Level 5 from Level 6. Details are shown in the table and graph below.

Year	Total B-BBEE Score	B-BBEE Level
2011	56.67	5
2010	45.52	6

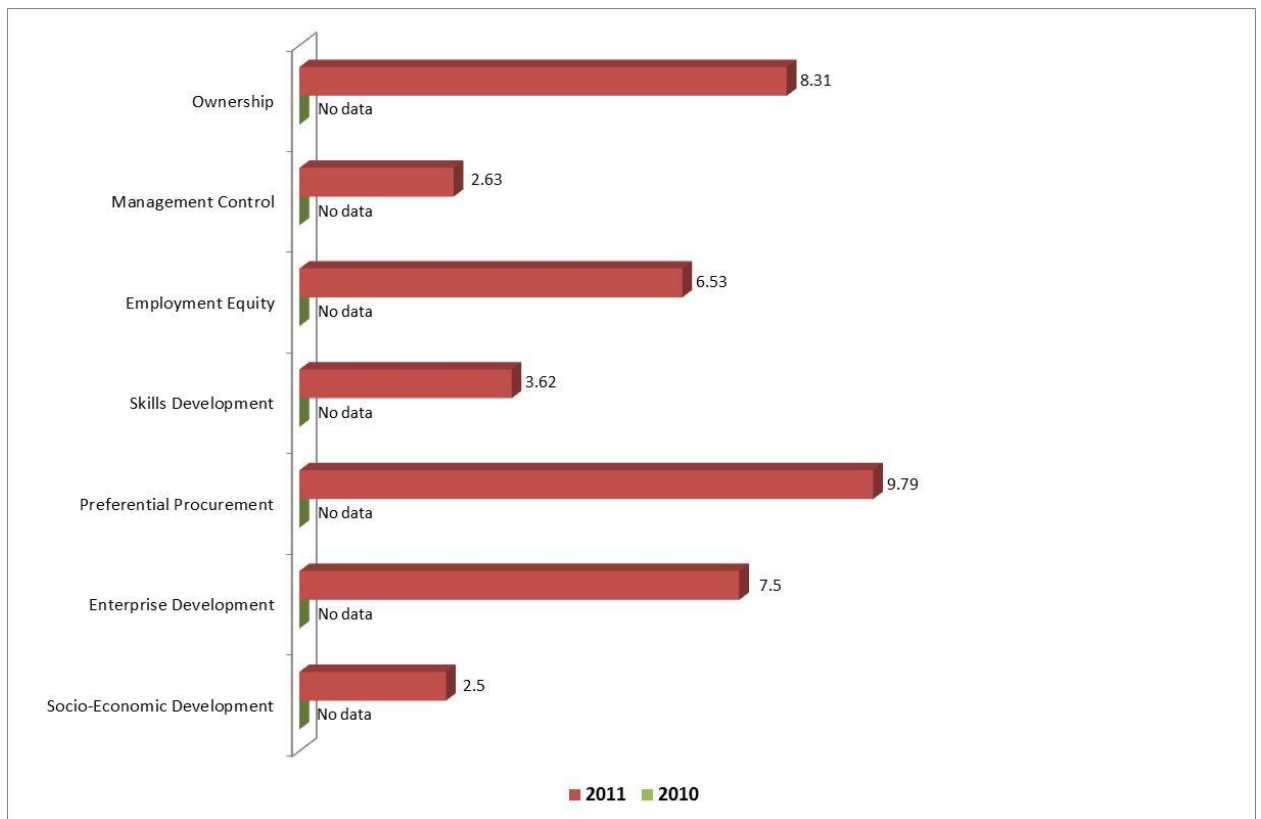


The sub-sector has shown significant improvement on enterprise development and skills development. However, on the aspect of management control and employment equity the sub-sector lags considerably behind other sub-sectors.

### 3.3 Chipping Plants

Data for 2011 reflects 77% coverage of the sub-sector, with one other enterprise not considering itself part of the forestry sector. No data from the first benchmark study is available, but in 2011 the sub-sector achieved an overall B-BBEE score of 41 equating to Level 7.

Year	Total B-BBEE Score	B-BBEE Level
2011	40.88	7
2010	-	-



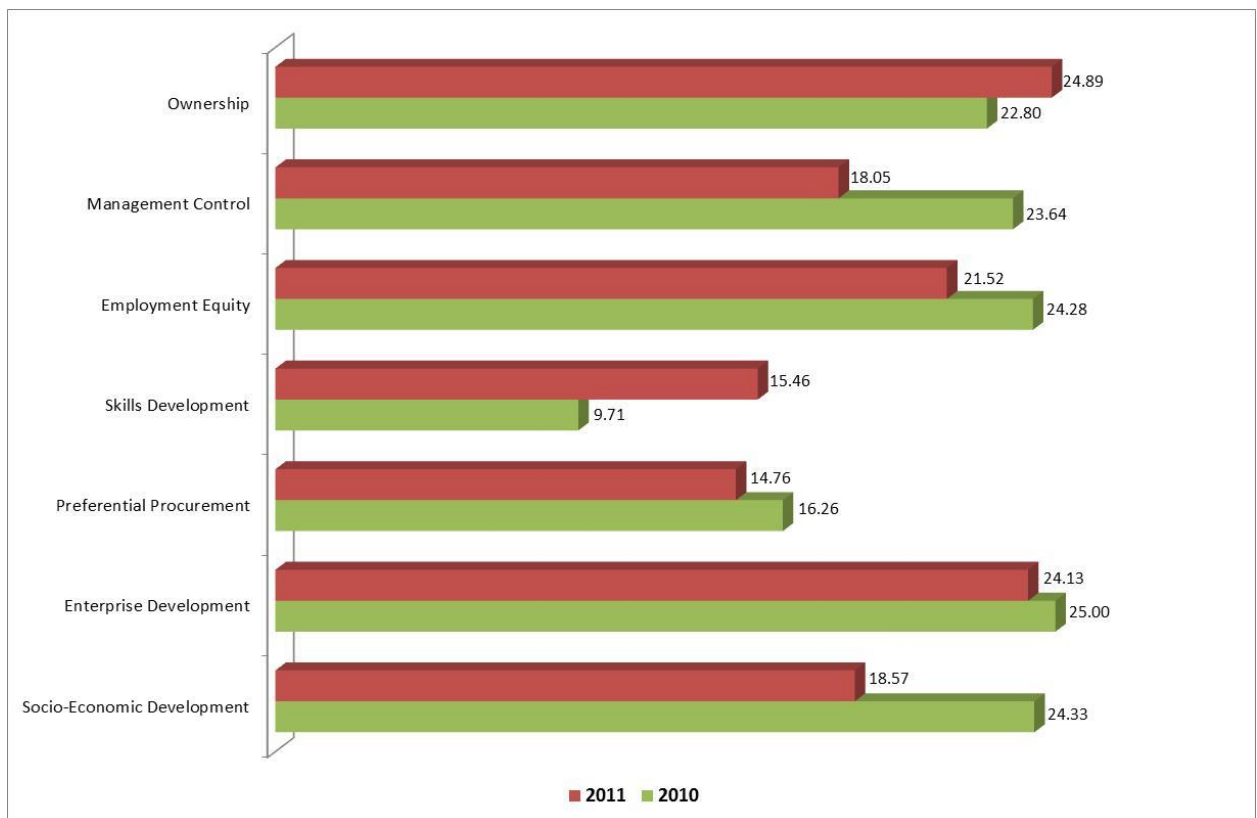
Enterprises in this sub-sector lag behind the results of the total forestry sector, particularly in enterprise development and socio-economic development as well as management control.

### 3.4 Contractors (QSE)

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 77, slightly down from 82 in the year before. This has resulted in maintaining a Level 3 contributor level. Details are shown in the table and graph below.

As a result of the large number of enterprises in this sub-sector, comparison on a constant sample basis remains problematic. The data, however, remains remarkably consistent despite variations in the sample constituents. It should be noted that the total score for QSEs is not equal to the sum of all element scores as only four element scores count.

Year	Total B-BBEE Score	B-BBEE Level
2011	76.89	3
2010	82.41	3

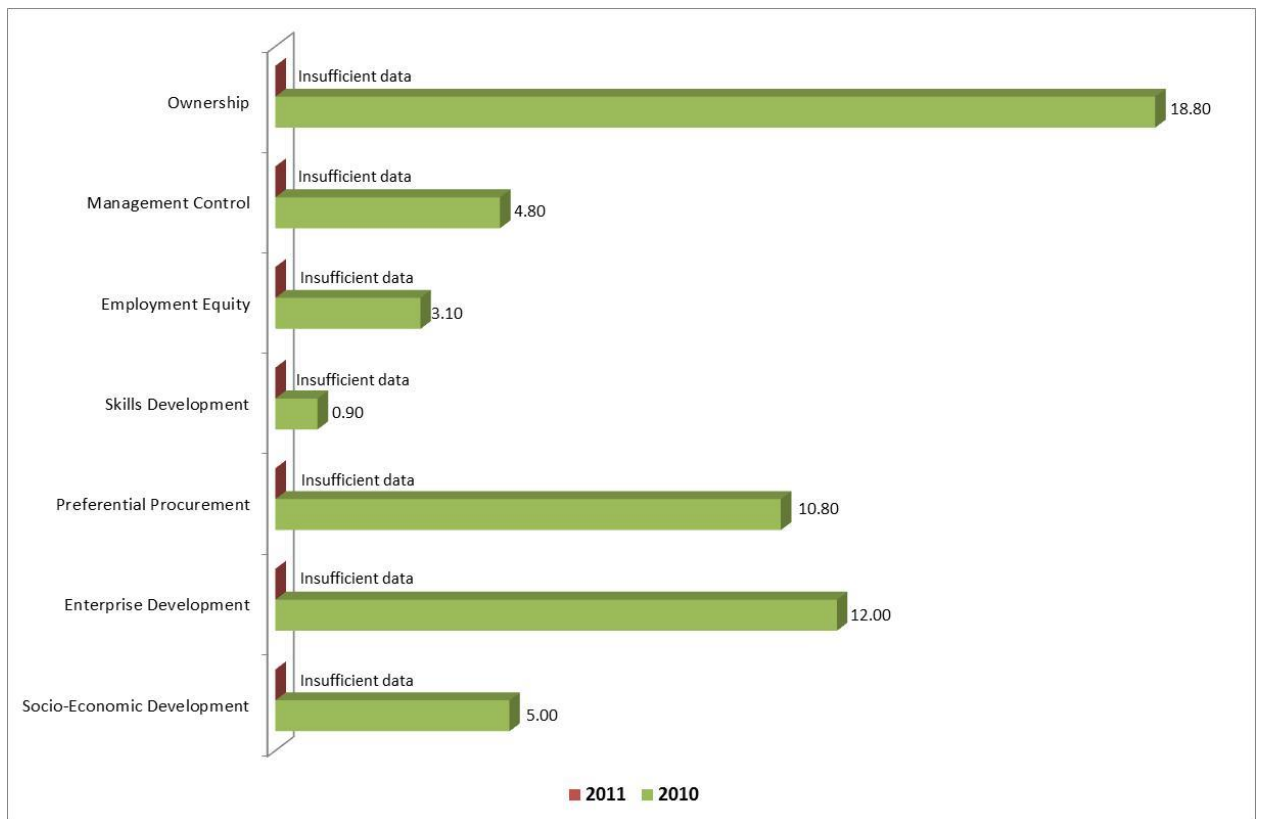


Aspects on which this sub-sector has improved are mostly in terms of skills development and preferential procurement.

### 3.5 Mining Timber Companies

Unfortunately, insufficient data exists for 2011 and the result is not reported due to only one enterprise in the sample. The other major enterprise in this sub-sector was in the process of verification during the year and could not supply a scorecard.

Year	Total B-BBEE Score	B-BBEE Level
2011	-	-
2010	55.40	5



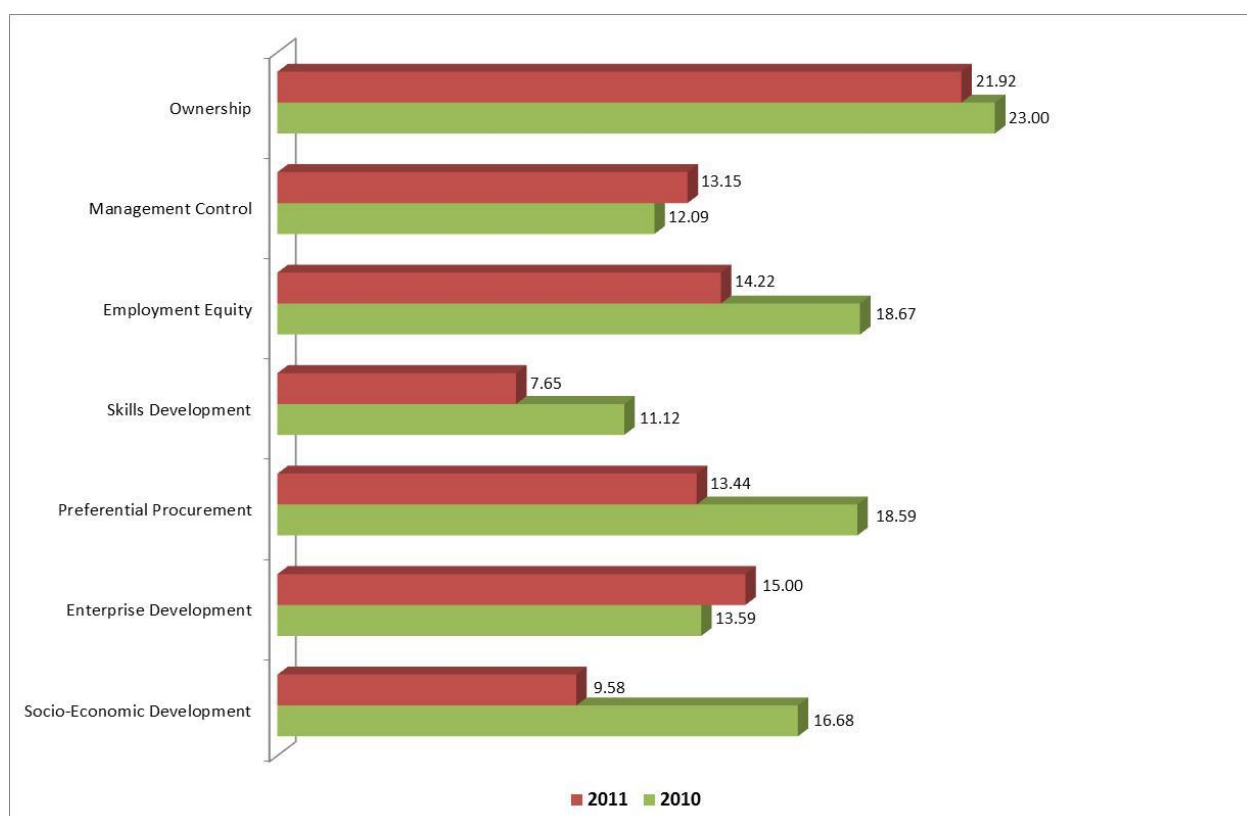


### 3.6 Pole Treaters

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 77, slightly up from 73 in the year before. This has resulted in an improvement to Level 3, up from Level 4. Details are shown in the table and graph below.

As a result of the large number of enterprises in this sub-sector, comparison on a constant sample basis remains problematic. The data, however, remains remarkably consistent despite variations in the sample constituents. It should be noted that the total score for pole treating enterprises is not equal to the sum of all element scores as only four element scores count in the case of QSEs.

Year	Total B-BBEE Score	B-BBEE Level
2011	76.91	3
2010	73.42	4



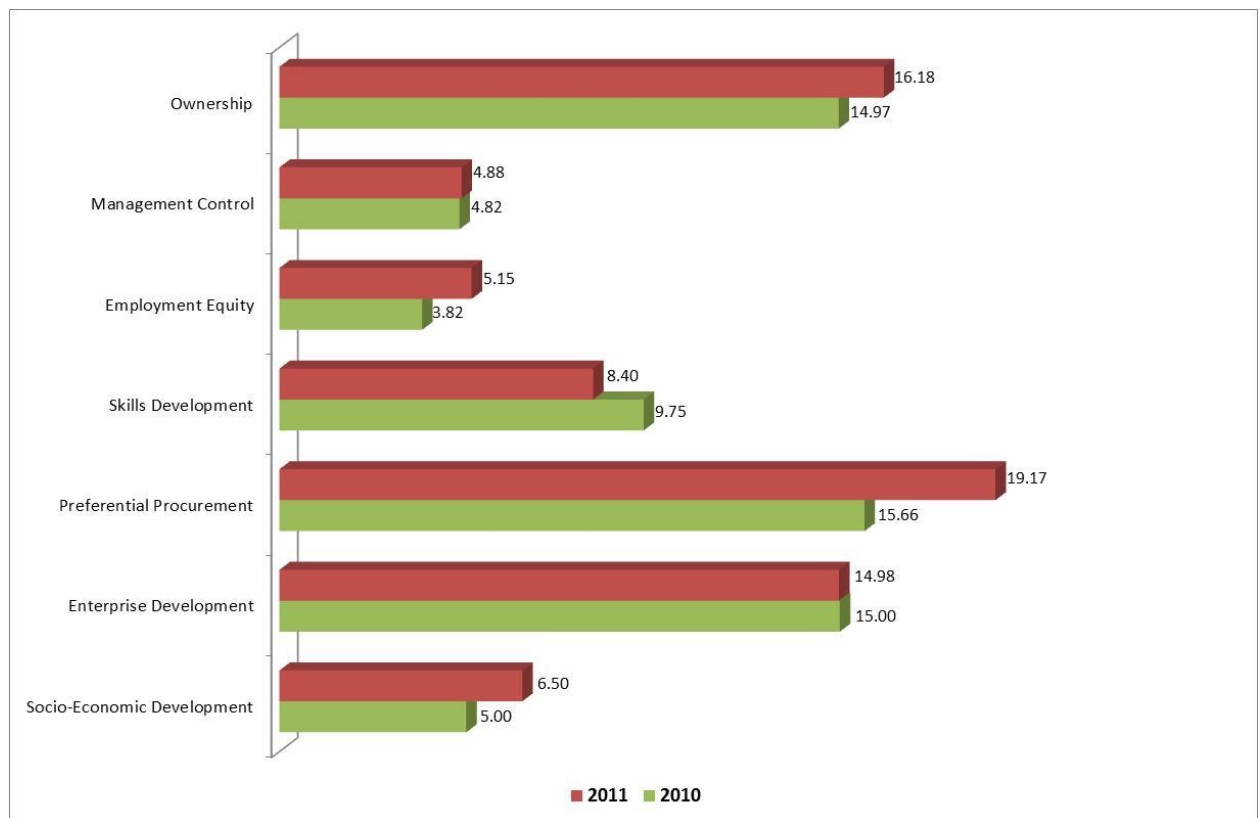
The sub-sector has seen a decrease in scores in the case of socio-economic development, preferential procurement and skills development, as well as employment equity. This may, however, be a consequence of variations in the sample.

### 3.7 Pulp and Paper Companies

In 2011, total coverage of the pulp and paper sub-sector was achieved with all enterprises submitting data. This sub-sector shows improvement in scores in six elements, with the exception of skills development.

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 75, up from 69 in the year before. This has resulted in an improvement to Level 3 from Level 4. Details are shown in the table and graph below.

Year	Total B-BBEE Score	B-BBEE Level
2011	75.24	3
2010	69.02	4



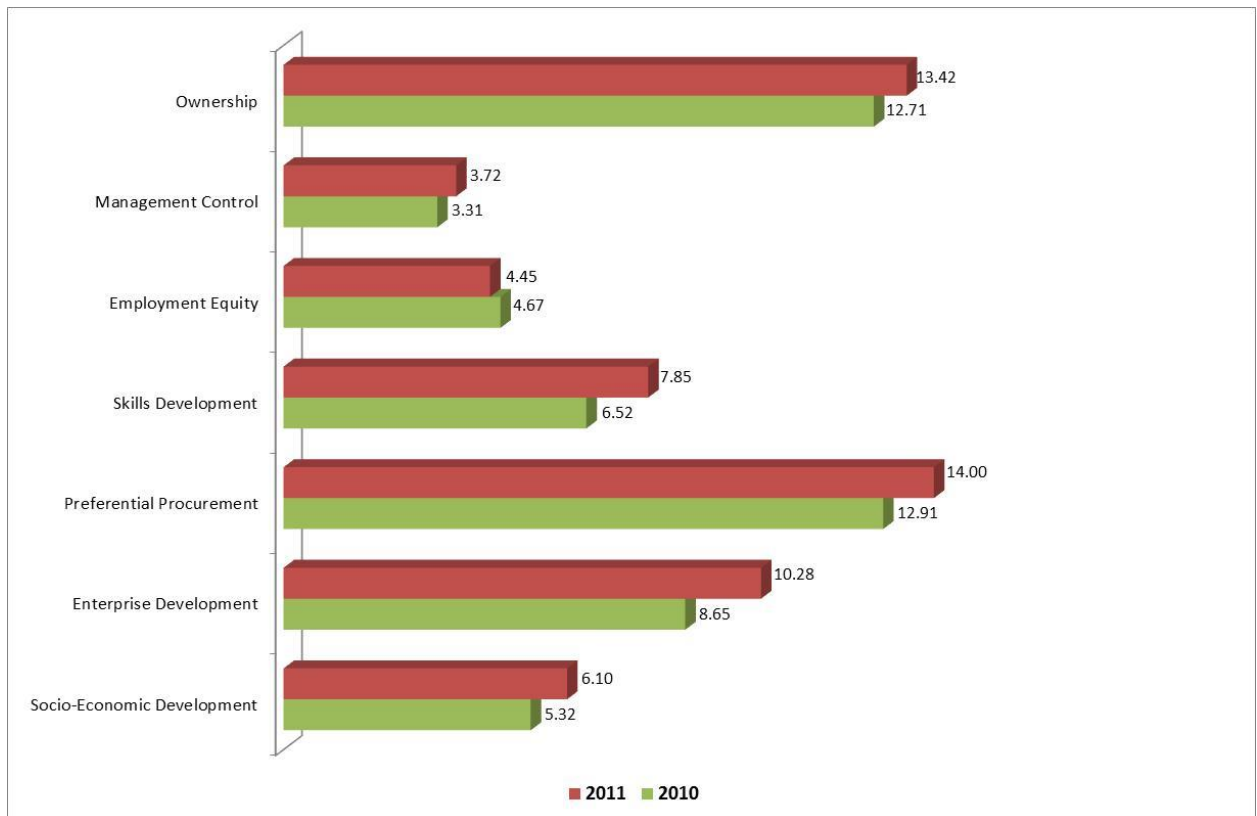
This sub-sector has achieved one of the best scores in respect of ownership, skills development, preferential procurement and enterprise development in the total forestry sector.

### 3.8 Large Sawmills

Data for 2011 reflects a good coverage (70%) of the sawmilling sub-sector. The data shows a comparison on a like-for-like basis, i.e. a constant sample.

The sub-sector has achieved a total B-BBEE score in financial year 2011 of 60, up from 54 in the year before. This has resulted in an improvement to Level 5 from Level 6. Details are shown in the table and graph below.

Year	Total B-BBEE Score	B-BBEE Level
2011	59.82	5
2010	54.09	6

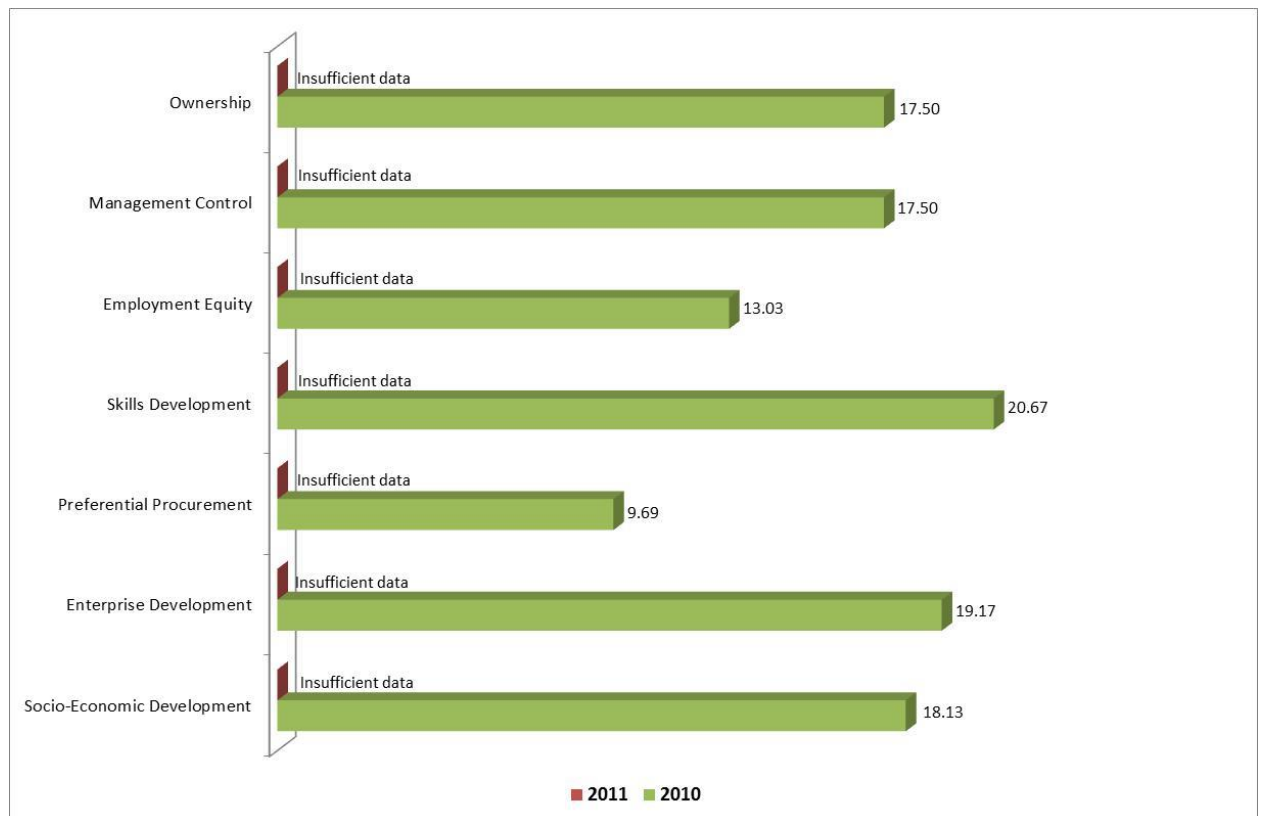


Large sawmilling enterprises perform reasonably well on ownership, preferential procurement and socio-economic development. Slightly below par performance is evident in management control and enterprise development.

### 3.9 Sawmills (QSE)

Unfortunately, insufficient data exists for 2011 and the result is not reported due to limited enterprises in the sample. This sector is characterised by a very fragmented structure and year-on-year comparisons are problematic due to large variations in the sample.

Year	Total B-BBEE Score	B-BBEE Level
2011	-	-
2010	61.64	5



### 3.10 Scores by Element

In this section, progress towards the target score on each element is measured. As an example where the target score for a particular element is 15, and the actual scorecard result is 12, progress towards the target score is given as 80%. The analysis indicates to what extent there is still room for transformation in respect of all seven measurement elements.

#### 3.10.1 Ownership

With regard to ownership, all large enterprises in the forestry sector have shown progress towards the target score, with the exception of board producers.

	Sub-Sector	Year	% of Target Score
Ownership	Large Forestry	2011	66%
		2010	49%
	Board Producers	2011	48%
		2010	48%
	Mining Timber	2011	-
		2010	94%
	Pulp and Paper	2011	81%
		2010	75%
	Large Sawmills	2011	67%
		2010	64%

### 3.10.2 Management Control

With regard to management control, all large enterprises in the forestry sector have shown improvement with the exception of board producers.

	Sub-Sector	Year	% of Target Score
Management Control	Large Forestry	2011	52%
		2010	40%
	Board Producers	2011	6%
		2010	9%
	Mining Timber	2011	-
		2010	48%
	Pulp and Paper	2011	49%
		2010	48%
	Large Sawmills	2011	37%
		2010	33%

### 3.10.3 Employment Equity

Large forestry and pulp and paper enterprises have shown significant progress regarding employment equity. Overall, large enterprises in the forestry sector are on average at 34% in terms of progress towards the target score on employment equity.

	Sub-Sector	Year	% of Target Score
Employment Equity	Large Forestry	2011	36%
		2010	29%
	Board Producers	2011	35%
		2010	34%
	Mining Timber	2011	-
		2010	21%
	Pulp and Paper	2011	34%
		2010	25%
	Large Sawmills	2011	30%
		2010	31%

### 3.10.4 Skills Development

Overall, large enterprises in the forestry sector are on average at 60% in terms of progress towards the target score on skills development.

	Sub-Sector	Year	% of Target Score
Skills Development	Large Forestry	2011	67%
		2010	58%
	Board Producers	2011	62%
		2010	44%
	Mining Timber	2011	-
		2010	6%
	Pulp and Paper	2011	56%
		2010	65%
	Large Sawmills	2011	52%
		2010	43%

### 3.10.5 Preferential Procurement

With regard to preferential procurement, all enterprises in the forestry sector have shown progress. Overall, large enterprises in the forestry sector are on average at 77% in terms of progress towards the target score on preferential procurement.

	Sub-Sector	Year	% of Target Score
Preferential Procurement	Large Forestry	2011	82%
		2010	71%
	Board Producers	2011	59%
		2010	50%
	Mining Timber	2011	-
		2010	54%
	Pulp and Paper	2011	96%
		2010	78%
	Large Sawmills	2011	70%
		2010	65%

### 3.10.6 Enterprise Development

Large forestry and pulp and paper enterprises have shown significant progress regarding enterprise development. Overall, large enterprises in the forestry sector are on average at 87% in terms of progress towards the target score on enterprise development, with large forestry and sawmilling enterprises lagging behind.

	Sub-Sector	Year	% of Target Score
Enterprise Development	Large Forestry	2011	77%
		2010	58%
	Board Producers	2011	100%
		2010	65%
	Mining Timber	2011	-
		2010	80%
	Pulp and Paper	2011	100%
		2010	100%
	Large Sawmills	2011	69%
		2010	58%

### 3.10.7 Socio-Economic Development

Overall, all large enterprises in this sector have either achieved or exceeded the target score with regard to socio-economic development. This would imply expenditure on socio-economic development initiatives in excess of the minimum percentage required relative to after-tax profit.

	Sub-Sector	Year	% of Target Score
Socio-Economic Development	Large Forestry	2011	>100%
		2010	>100%
	Board Producers	2011	100%
		2010	70%
	Mining Timber	2011	-
		2010	100%
	Pulp and Paper	2011	>100%
		2010	100%
	Large Sawmills	2011	>100%
		2010	>100%



#### 4. SUMMARY OF STATUS OF TRANSFORMATION

The scorecard results (overall scores and contribution level) for all of the sub-sectors covered in this research are summarised in the table below for the two financial years. In total, the sector as a whole is at Level 4 in 2011, up from Level 5 the previous year. The result has been calculated using the sub-sector weightings as described in Section 2.1 of this report. For EMEs, Level 4 has been assumed to calculate the overall result.

Sector	2011		2010	
	B-BBEE Score	B-BBEE Level	B-BBEE Score	B-BBEE Level
Large Forestry	69.96	4	56.75	5
Board Producers	56.67	5	45.52	6
Chipping Plants	40.88	7	-	-
Contractors (QSE)	76.89	3	82.41	3
Mining Timber	-	-	55.40	5
Pole Treaters	76.91	3	73.42	4
Pulp and Paper	75.24	3	69.02	4
Large Sawmills	59.82	5	54.09	6
Sawmills (QSE)	-	-	61.64	5
<b>TOTAL SECTOR</b>		<b>4</b>		<b>5</b>

As is evident from the table, most of the large sub-sectors, notably forestry, pulp and paper, sawmilling and board producers, have improved their contribution level over the analysis period.

Other data that is presented on B-BBEE scorecards relates to ownership, and data for black ownership and black female ownership for each of the sub-sectors is presented in the table below. No supplementary information with regard to changes in the results over the analysis period is available and this would need deeper interrogation at enterprise level.

Sector	Black Ownership	Black Female Ownership
	2011	2011
Forestry	23.6%	4.0%
Board Producers	14.2%	2.8%
Pulp and Paper	20.3%	1.8%
Large Sawmills	20.4%	5.2%