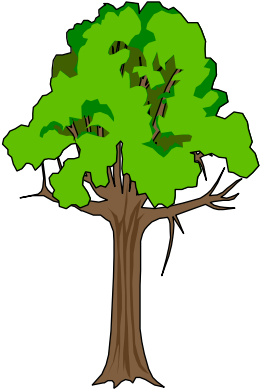


# Production Chain



**FEDEMADERAS**  
Federación Nacional de Industriales de la Madera

## NATURAL FOREST

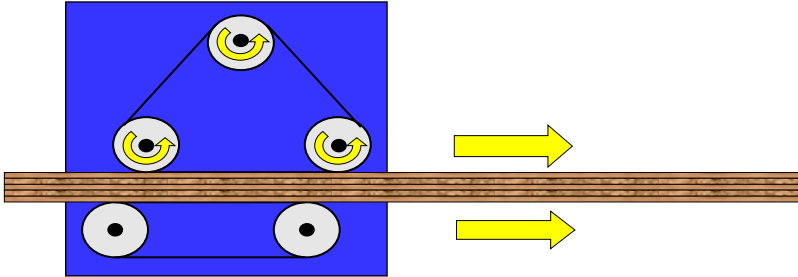


7 Comunities in the Pacific Coast

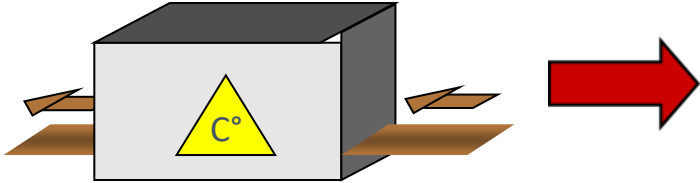
## PLANTED FOREST



## RAW MATERIALS / TRANSFORMATION



## VENDOR AND SUPPLIER



## PRODUCTS Y FURNITURE

# The guild in numbers



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Industriales de la Madera

**531.699** Has. of planted forestl Ministry of Agriculture until Dic. 2019

**122** Thousand  
New Has.  
PND Target  
2018-2022

**145,6 thousand**  
Mt3 mobilized of Natural Forest in 2019 (Ministry of Environment)

**Consumption**  
**186.3** Ton/1000  
habitants in 2018p (DANE)

**2.3%** annual growth  
hectares planted between **2014 and 2018** (ProColombia and Ministry of Agriculture)

**59 millions Has** of  
Natural Forest according to Ministry of environment 2019. y **0 Has**  
certified FSC

On average, **12 hectares of planted Forest** generate 1 direct job and 3 indirect Jobs

**1.095.366** Mt3  
1,095,366 Mt3 of Planted Forest mobilized from 06/2019 to 06/2020 (Ministry of Agriculture)

# The guild in numbers



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Federación Nacional de  
Industriales de la Madera

**88.500**

formal employment  
and 260.000 indirect  
jobs

**Income from offsetting Carbon Tax is  
important for reforesters**

Specially in the absence of resources from CIF  
since 2017

**Average of 10%  
annual increase  
in VAT** between 2017  
and 2019

**95,8%**

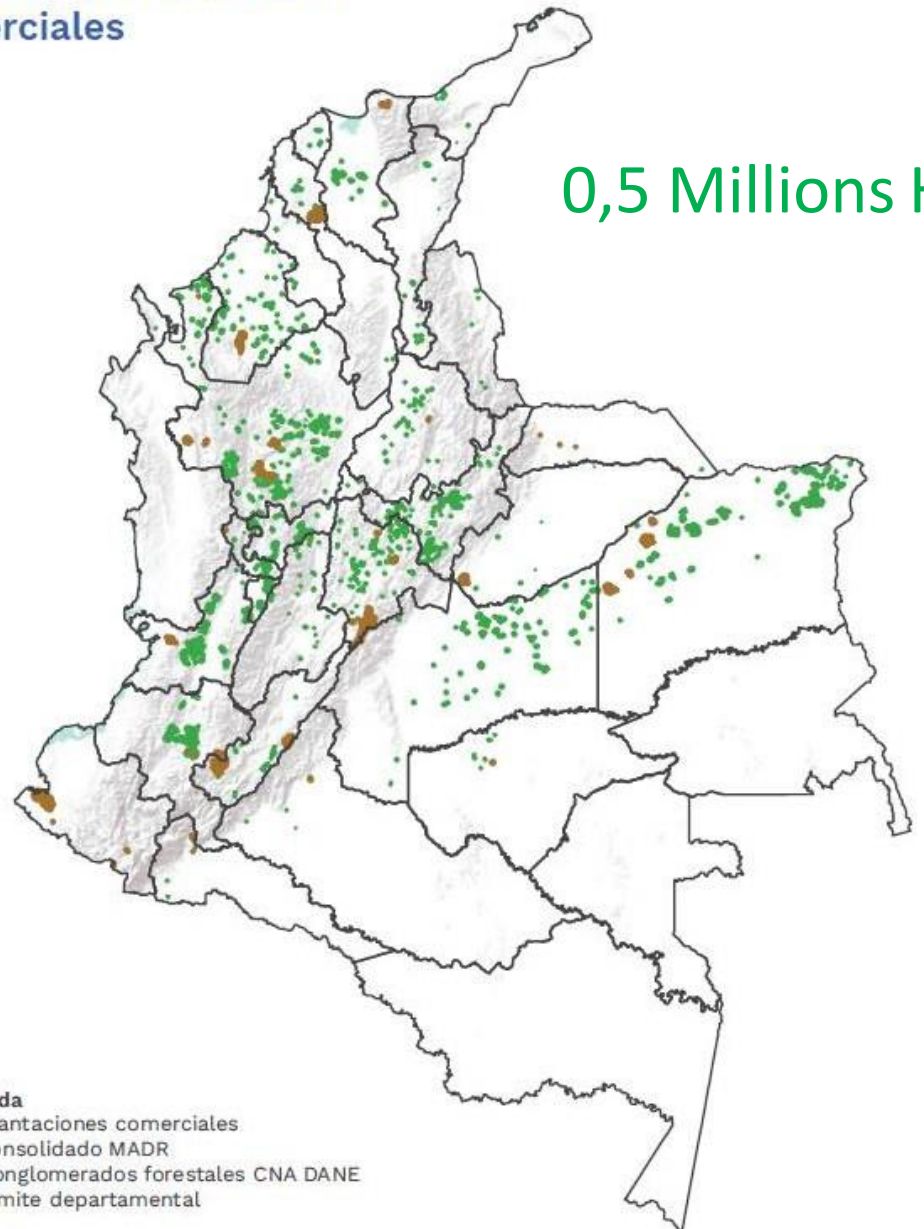
Of the 3,412 companies and producers of  
the Chain are MSME

Colombia es the  
**largest importer**  
of wooden boards on  
the continent since  
10/2018



Source: DANE - 3er CNA 2014

**Plantaciones forestales comerciales**



Source: Forestry Newsletter, Ministry of Agriculture, 2020

# Wood Market in Colombia



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**Some Legal Formal**



**A lot of ilegal informal**

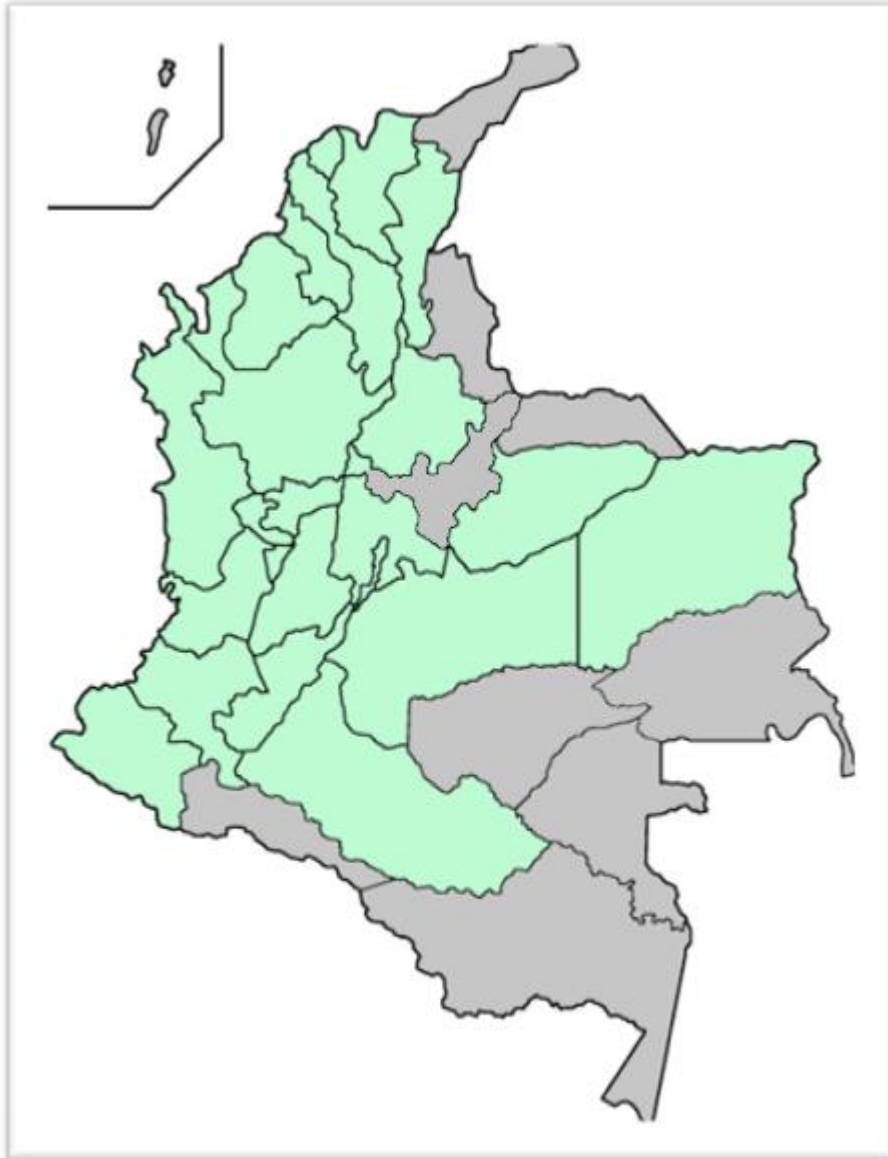


Credits: BETO from *El Espectador*



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## Area of influence



**22** departamentos

with **472** producers and  
companies

# Per cápita Wood consumption Official numbers



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In 2018, for every 1000 hab./ 186,39 tons of products of Wood

**Tabla 3. Consumo per cápita de productos del bosque  
toneladas/1.000 habitantes  
2014- 2018<sup>P</sup>**

Productos del bosque	(t/1.000 habitantes)		Variación
	Serie (2014 - 2018 <sup>P</sup> )	2018 <sup>P</sup>	2018 <sup>P</sup> /2017 (%)
Total productos del bosque		187,13	-2,2
Productos forestales maderables		186,39	-2,2
Productos forestales no maderables		0,74	5,7

**Fuente:** DANE, Cuentas nacionales.

<sup>P</sup>provisional.

**Source:** Cuenta ambiental y económica 2014-2018p, DANE.

<https://www.dane.gov.co/index.php/estadisticas-por-tema/ambientales/cuenta-satelite-ambiental-csa#cuenta-ambiental-y-economica-de-flujos-del-bosque-en-unidades-fisicas-y-monetarias>

# Per cápita Wood consumption FAO STAT

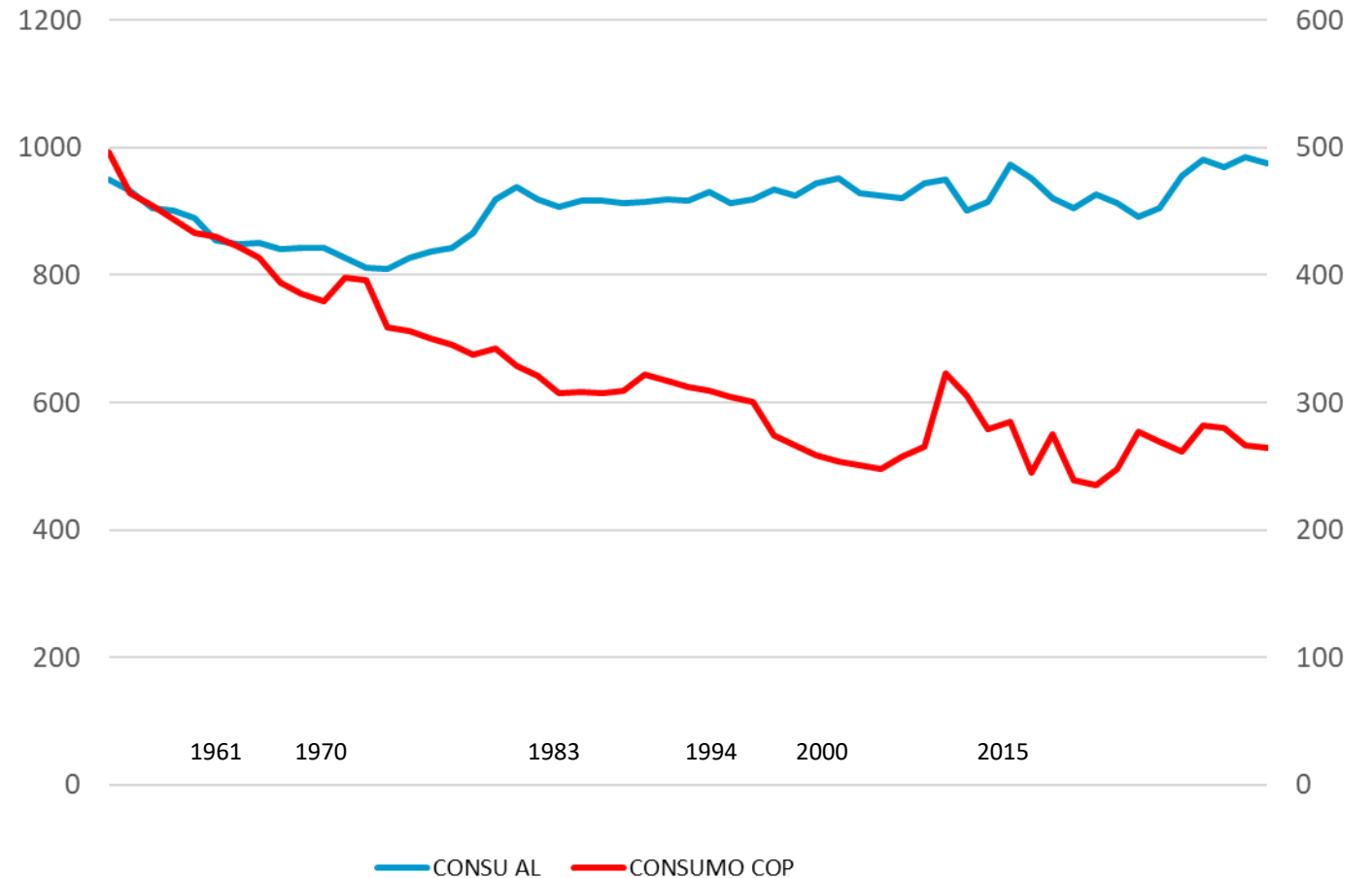


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Industrial wood is used in the manufacture of forest products, including pulp and paper, lumber and panels. This category excludes wood used as fuel.

From 1960 to 2015 per capita industrial wood consumption increased 2,67 times in Latin America.

In the same period, Colombia's consumption decreased 3,5 times. Colombia has one of the lowest per capita wood consumption rates of Latin America.

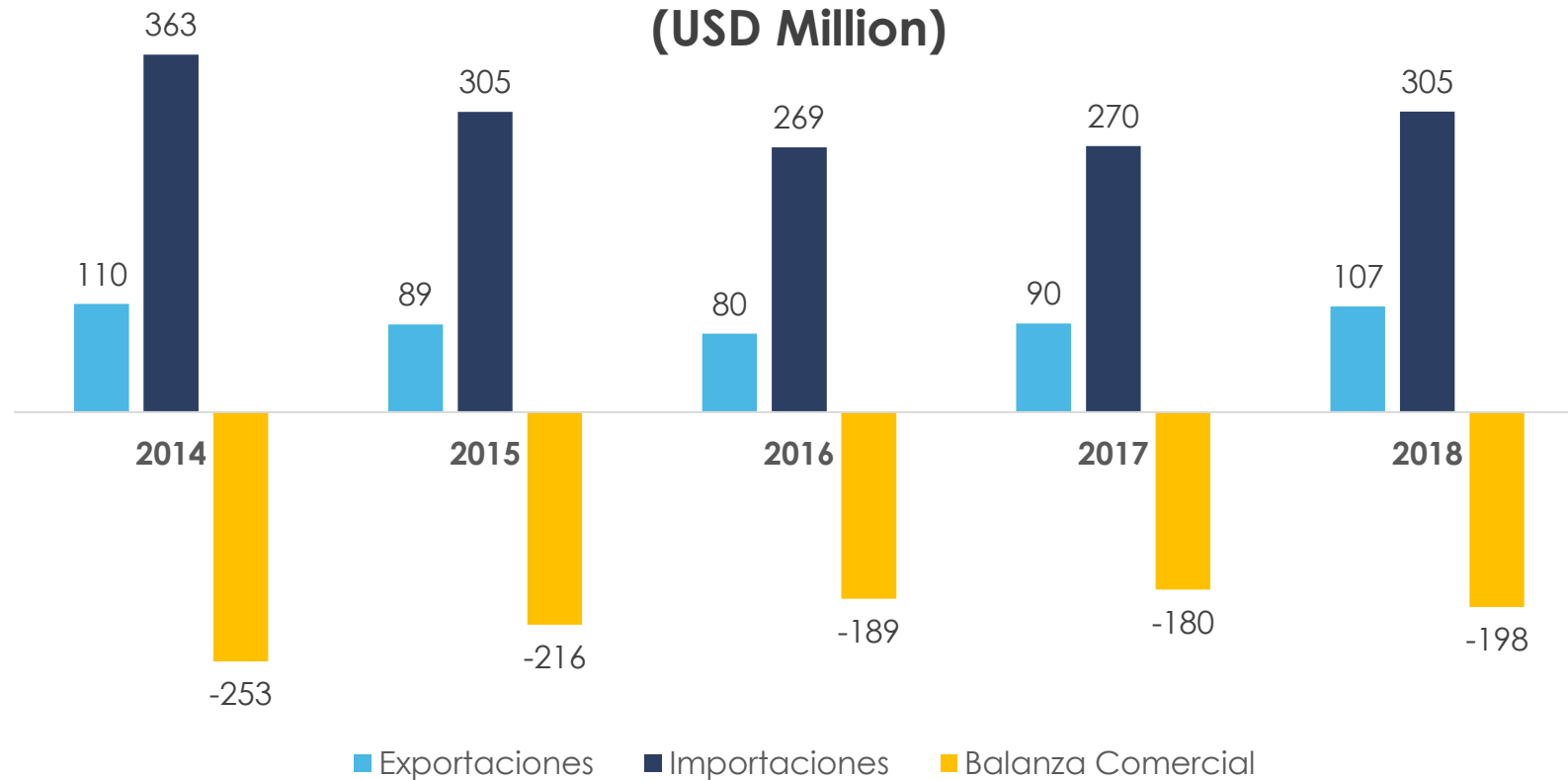


Source: FAOSTAT en [www.fao.org/faostat/](http://www.fao.org/faostat/)



# Colombia is a net importer of the furniture and wood sector

Trade balance of Colombia in the furniture and wood sector (USD Million)



There are opportunities to supply the Colombian market

**Nota:** se utilizaron las partidas arancelarias 4401, 4402, 4403, 4404, 4405, 4406, 4407, 4408, 4410, 44011, 4412, 4413, 4414, 4417, 4419, 4420, 4421, 9403.

**Fuente:** Trademap

