

WP1 – Regional NWFP sector mapping

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Introduction

WP1 task 1.1 is “Regional NWFP sectoral mapping” and comprises the development of common protocols, organisation of resulting data and the preparation of a ‘State of the European NWFP sector’ (Deliverable D1.1 due in month 20 – i.e. June 2014). This deliverable is to be derived from the regional case study data collected during the first phase of fieldwork and should be made up of analyses from both the perspective of each CSR and each WP (Task 1.1.3).

Although there has been some work to describe regional NWFP sectors¹ there has not yet been a systematic description of the NWFP sector across Europe. The intention behind the proposal for WP1 to undertake a NWFP sector survey was to provide such a description based on observations in the 14 case study regions. The complexity and lack of an accepted framework for the NWFP sector informed the decision to adopt a ‘broad and shallow’ approach to data collection in order to capture the full scope of activities associated with NWFPs. However, even casual consideration of NWFP present in the marketplace reveals that the NWFP sector is composed of distinct sub-sectors some of which are long established and well organised e.g. edible mushroom trade in Italy and others are recent innovations e.g. bushcraft recreational courses in UK.

What do we mean by sub-sector? This is something which does not have a formal definition but should be understood for now as a pragmatic grouping of enterprise activities according to their similarity – so a sub-sector could be niche sales of dried mushrooms and contain many enterprises or could be niche online sales of flower bulbs by just one enterprise. These both represent a unique combination of activities and markets. One way to identify a sector is to think about whether there is any co-operation or competition between enterprises selling these products.

The results of this mapping should provide a qualitative account of present composition of the sector in terms of the range of products and the nature of NWFP use and enterprise activity in each case study region. This will serve both as a statement of the current status of the sector and to establish the context for the in-depth case studies and action research.

¹ For example: Dyke AJ & Primrose D (2002) Non timber forest products study. Scottish Forest Industries Cluster, Edinburgh. Wong JLG & Dickinson BG (2003) Current status and development potential of woodland and hedgerow products in Wales. WRL report for CCW, FCW and WDA.



The Household survey proposed by WP3 will provide data on the species and quantities of NWFPs picked for personal consumption so the sector mapping exercise will mostly be concerned with enterprise activity related to the *consumptive use* (i.e. harvesting) of plant and fungi based products. Though please do report the most prevalent resources which are picked by the general public.

Question 3 of the Background questionnaire contains information from each CSR which represents a first look at the sector and will be used as a starting point for the NWFP sector mapping exercise as described below.

There are a range of approaches that can be used to obtain information at enterprise level but since this is a broad and shallow survey your enquiries should be limited to sources which are readily available and do not require direct contact or interviews with the enterprise proprietors.

The survey should be undertaken by 10th May.

Data capture and submission should be on an Excel spreadsheet for which detailed guidance is provided below.

Utilising the Background questionnaire

The Background questionnaire completed by CSRs in the first few months of the project was completed by the CSRs using their own knowledge or in consultation with regional experts. Question 3 asked the CSRs to report the information listed in Table 1 for a list of broad NWFP categories listed in Table 2.

Table 1: Information collected in Background questionnaire

Question	Coded responses
Production system	Semi-natural forest Cultivate Plantation Mixed
Used in your region?	Not used Low High Potential for the future
Trade	Not traded Local Regional International

Table 2: NWFP categories used in Background questionnaire

Broad category of nwfp (in no particular order)	Number of positive responses (n=14)
Honey	14
Other bee products (e.g. beeswax, royal jelly etc.)	10
Reproductive material (e.g. mushroom spawn, tree seed etc.)	9
Mosses & lichens	7



Truffles	7
Mushrooms	14
Edible nuts (e.g. hazelnuts, walnuts, chestnuts, pine nuts)	13
Berries (e.g. <i>Vaccinium</i> , <i>Rubus</i>)	10
Fruit (e.g. Sorbus)	10
Natural gums	2
Pigments (natural dyestuffs)	3
Essential oils & aromatics	8
Exudates (e.g. resin, turpentine)	6
Extractives (e.g. Rosin, wood tar, tall oil)	4
Phyto-chemicals derived from forest plants (e.g. pharmaceuticals etc.)	6
Products of bio-refining e.g. bio-fracination	2
Game meat (e.g. birds, deer, squirrels etc.)	13
Fish etc. from forest streams	11
Live animals	5
Other animal products (e.g. pelts)	6
Live plants	
Foliage	7
Bark (e.g. cork, bark mulch, for tanning etc.)	12
Others:	
Bark bread	1
Birch juice	1
Care products: peat & clay	1
Christmas trees	1
Eggs of ants	1
Fibre plants	1
Linden tree flower	1
Medicinal plants & aromatics	1
Tourism	1

As shown in Table 2 the provided list of NWFP categories was augmented with a few additional products proposed by specific CSRs. This list forms the basis of the sector review.

The information in the Background questionnaire on plants, fungi and bees supplemented by free-text notes provided by several CSRs confirmed the existence of a wide range of products but also showed up some weaknesses in the NWFP categories used. Table 3 represents a re-ordering of the NWFP categories across all regions based on the results of the Background questionnaire and elements of the classification scheme proposed by Mantau *et al* 2007². Table 3 breaks down the NWFP sector based on broad categories of use, the type of resource harvested (berries, bark etc.), the species from which the resource is derived and finally the product which is made from that resource. There are a great many gaps in this table some of which should be filled by the sector survey. Remember though that the target here is to describe enterprise activities which have similar relationships to the products and markets. We are not attempting to list all species and products. If

² Mantau U, Wong JLG and Curl S (2007) Towards a taxonomy of Forest Goods and Services. Small Scale Forestry 6(4).



berries and fruit are harvested, used and marketed in the same way then there is no need to distinguish between them. A few examples of products are given in Table 3 to show how it can be filled. Your objective should be to use and modify this structure to describe what you know to be happening in your region.

Although included in the Background questionnaire, animal based products and services have been excluded from the sector survey. This is because StarTree’s focus is plant and fungi products. There are however some grey areas (is willow for baskets a wood or NWFP product?) and also a lot of interest in bee products which has therefore been included. There were some questions asked about the boundary between NWFP and timber sectors in the Background questionnaire where it was pointed out the ‘extractives’ of wood are often sourced as a by-product of the timber industry and should perhaps be counted there. This may be correct in many cases but strictly such products are *not wood* so part of the FAO classification which has been adopted by StarTree – no decision has yet been made on whether these are of interest to StarTree – perhaps yes in the case of medicinal products derived from conifer brush, perhaps no in the case of bio-diesel ... but we will need more information and discussion to fix these boundaries. For now please describe the status of such activities in your region.

Although this scheme looks like a standard dichotomous classification it should not be treated in this way but more as a means to organise terms to describe products. Inspection of Table 3 will reveal species may appear in more than one sub-sector. Please do propose new categories within the use categories and don’t worry about where to place a descriptive term – these can all be re-sorted during analysis. There is, as yet, no universally accepted classification of NWFPs so we are free to propose and adopt one to suit the StarTree objectives which, in this instance is the description of enterprise activity and so is based primarily on utilisation. At this stage we are concentrating on the collection of data and classes have been formed to help guide enquiry and not as definitive classes. Analyses of the data once we have it will be used to generate a more robust classification of enterprise activity.

Table 3: NWFP sectoral breakdown

Use categories	Resource type	Species	Product
Beverages	Berries		Spirits
	Flowers	Linden	Tea
	Fruit		
	Leaves (trees & shrubs)		
	Sap	Birch	Vodka
	Herbs (ground flora)	<i>Bellis perennis</i>	Spring tea
Cork	Bottle stoppers	<i>Quercus suber</i>	
Craft materials	Bark	Birch	Baskets
	Whities (woody stems for baskets)	Willow	
	Pigments	Lichen	Hobby courses
		Mushrooms	



Use categories	Resource type	Species	Product
Decorative items	Branches	Spruce & Juniper	
	Christmas trees		
	Foliage	<i>Rhododendron ponticum</i>	Floristry
		Conifer foliage, cones	Wreathes
		Mistletoe	Christmas decoration
	Mosses & lichens		Wreathes
Cones	Conifer	Wreathes & table decoration	
Industrial raw materials	Turpentine	Pines, tapped live trees	
		Timber by-product	
	Tar	Pine	
	Resin	Pine	
	Natural gums	<i>Cistus spp.</i>	
		Pine	
	Phytochemicals	Mistletoe	pharmaceutical industry
Bio-refining	Conifer brash	Tonics, plant feed, chemical compounds	
Foodstuff	Bark		Pettu (bark bread)
	Berries	Cranberries	
		Sorbus	
		Elder	
	Mushrooms	31 edible species	
	Nuts		Speciality restaurants
		Chestnut	
		Hazelnuts	
	Truffles	<i>Tuber borchii</i>	
Fruit	Sorbus		
Wild food		Bushcraft, survival courses	
Horticultural products	Tree seed	Trees	
	Other reproductive materials	<i>Hyacinthoides non-scripta</i>	Flower bulbs
		<i>Allium ursinum</i>	Bulbs
	Bark	Timber by-product	Garden mulch
	Live plants	Trees	Bonsai
Trees		Transplants	
Medicinal products	Herbs (ground flora)	Lichen	Tea
		18 species.	
		<i>Rhododendron luteum</i>	
	Trees	<i>Picea abies & Abies alba.</i>	
	Fungi		
Personal care products	Skin products	Peat	
	Brushes	Birch	Sauna
	Essential oils		Sauna scents
	Aromatics		
Bee products	Honey	Lime, heather, horse chestnut	Speciality honey
	Live bees	Welsh Black bees	Beekeeping
	Wax		

Completing the sector survey

The “Sector survey” in the Excel file provided contains a copy of Table 3 prefilled with your responses to the Background questionnaire. Please consider carefully consider all product types



including embedded products. Some will be self-evident while others may be very unfamiliar. Please do at least make a few enquiries before indicating something is **not** present – the existence of one new enterprise or the last survivor of a traditional industry is interesting information and can provide a useful indicator of trends and a benchmark for monitoring the dissemination or loss of activities.

The survey is intended to be a quick overview to provide introductory material for the State of the Sector report for your region. The main source will be your existing knowledge and existing sectoral reports. There are brief descriptions of many of the StarTree countries in the COST E30 reports available in Acta Silvatica & Lignaria Hungarica 2005 in the special edition on Forest Sector Entrepreneurship in Europe: Country Studies (<http://aslh.nyme.hu/index.php?id=8851&L=4>). Use such material as a starting point and consider whether the information from existing studies is still current. Add to this using expert knowledge (your colleagues), web-searches (especially for areas you may not previously have considered) and observations in shop/market surveys. Remember this is not a formal survey so gaps are allowed – though please indicate if there is evidence of activity even if you have not been able to track down all the details. Feel free to provide references for your entries in the Notes column.

Use category, Resource type, Species & Products

These fields you should use to describe the sub-sectors. Please do not change the use categories though feel free to add more if you need to.

The resource type is the nature of the plant part from which the product is derived. You can change these and add more lines to make this fit the products in your region.

Add some information on the species harvested. Try to group species which are harvested and marketed together. Add lines for separate species if they lead to distinct product lines. Your entries do not need to refer to scientific i.e. Latin names – you can also use categories such as ‘spring flowers in ash woods’.

Add some information on the product sold by the enterprise. Group products which are sold on through the same supply chains. You can describe the form in which the product is marketed in the appropriate Description column for each type of market.

Production system

Complete this column using the codes provided below but feel free to add others as needed to describe your region. You can leave these cells blank if you are unsure

Provided codes:

Plantation	A classic timber plantation – usually of exotic species and in a formal silvicultural regime
Agroforestry	Any combination of trees and woodland in an intimate mix with agriculture. So Montado in Portugal and hedgerow products in UK. Please provide a brief



	description of what you mean by agroforestry.
Urban	Collection or activities within an urban or peri-urban context. E.g. the urban food initiative in London
Semi-natural forest	Native species in more informal arrangements than a plantation, usually self-seeded
Cultivated	Products specifically cultivated within or outside a forest

Role

This is intended to convey some basic information on what the product means to the picker. It could be for:

Personal use only	Picked by general public for personal use and home consumption. Personal use will be assumed to occur in all other roles.
Gifts	Exchanged as gifts with family and friends
Seasonal income	Used to contribute a diversification opportunity
Livelihood	Used as a source of livelihood e.g. full time jobs

Please elaborate if you find other examples and feel free to leave cells blank if you do not have any information to hand.

Extent of commercialisation

This is intended to indicate the extent of commercialisation and is a carry-over from the Background questionnaire.

Low	Very few enterprises engaged in product trade
High	Large number of enterprises trading product
Potential	Little or no enterprise activity at present but there is interest in it

Trade

The extent of the market for commercialised products.

Local	Close to source of product (e.g. within municipality)
Regional	Within Case study region
National	Within the country
International	Export outside the country

Markets

Please indicate if you have observed or heard where the product is sold.



For the purposes of this exercise three basic categories of NWFP market offers are proposed: mass market, niche or embedded products (see **Box 1**). We would like to know which products are commercialised in these ways in each region and how this varies between the StarTree regions.

Box 1: NWFP product categories

Mass market products

Mass market products offered (usually close to raw form) in large volumes to wholesalers or processors. To get a regional perspective evaluate whether the product is mass market or not when it leaves the region. For example; moss retails as a niche product but leaves Wales in bulk consignments sold to large Amsterdam based trading houses – so from the perspective of Wales this is a mass market product.

Niche products

Niche products are often processed or distinctively packaged to be attractive to specific small-scale market segments. Sales are generally in small quantities and often on short supply chains i.e. the picker or processor sells directly to the consumer. Farmers' markets and internet sales represent the extremes of the technologies and marketplaces on which niche products are sold though they can also be sold through retail outlets.

Embedded products

Embedded products where the harvested product is an intrinsic (and usually central) part of an offer which includes services such as education or recreation. E.g. hobby basket weaving classes cannot take place without willow – the cost of the willow is a small proportion of the overall cost of the basketry course but the existence of the course depends upon it.

Indicate all ways in which each product is marketed – it could be sold in both in wholesale (mass market) quantities and also processed as a niche product for local sales. In this case describe both markets. In the case that products are sold as part of a service e.g. willow basket weaving courses then describe the offer i.e. the service and not just the use made of the product.

Reliability of information

Please indicate the reliability of the information you have reported. If it is derived from hearsay (people talk about it but you haven't seen the product yourself) then you are probably 'Not sure'. On the other hand you are probably 'Very sure' of information derived from a study you have already done on a particular product.

