Forest owners’ viewpoint: Producing sustainable raw material for wood products industry

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Outline

• Introduction to CEPF
• Forests and forest owners in EU
• Private forest owners in the bioeconomy
• Sustainable wood supply
• EU policies and their impact on forestry
CEPF – the voice of European Private Forest Owners

- Non-profit organisation
- The umbrella federation of family forestry in Europe
- Represents and promotes the common interests of private forest owners in Europe
- CEPF serves the interests of the approximately 16 million forest owners. They are private individuals, families and cooperatives that take care of about 60% of Europe's forests.
CEPF – from roots to crown

Core principles

- **Sustainable forest management** and **multifunctionality** of forests and other wooded land
- Acknowledgement of **ownership rights**
- **Economic viability** of the forest holding as well as **competitiveness** of the forest and forest-based sector
CEPF Members

Ordinary members – national confederations:

Austria, Croatia, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Latvia, Lithuania, Luxembourg, Norway, Portugal, Slovenia, Spain, Sweden, Switzerland

Associated members:

ArcMed, CONFI, Waldverband Austria
European forests – a key resource for the bioeconomy

• 38% EU’s land area forested (157 mio ha)
• EU forest cover increasing by 0.5 mio ha/a
• Growing stock increase by 249 mio m3/a (1.2%)
• 64% of the annual increment harvested
• 90% of the EU processed timber is domestic timber
• Forest sector gross value added of 109 EUR billion (1% GDP and 8% of manufacturing GDP)
• 4 million employees
• Contributes to livelihoods of millions of private forest owners, and to public budgets
• Key habitat with high biodiversity, providing multiple ecosystem services

Source: State of Europe’s forests 2010 report
Europe’s forests are growing!

- **Forest area and growing stock (EU-27)**
  - Forest area
  - Forests available for wood supply
  - Total growing stock

- **Increments and fellings (EU 27)**
  - Annual increment
  - Annual fellings
  - The harvesting rate
Diversity of private forest ownership

- About 50-60% of forests privately owned
- Approx. 16 million forest owners
- Small scale forest holdings (average size within EU 13 ha, but most own 2-5 ha)
- 1/3 large, 2/3 small
- 83% individuals/families; 12% forest industries; 5% private institutions
- New types of PFOs
- 20-30% pensioners
- Concept of forest owners associations, producer groups/cooperatives
Private forest owners in the bioeconomy

• Bioeconomy starts with and depends on biomass production
• Europe’s private forest owners = key for a EU-grown bioeconomy with wood as a main renewable resource
• Investments and support for rural sector, securing good conditions and benefits for millions of forest owners and farmers are needed
• Rural sector must remain attractive and competitive!
Sustainable wood supply

• Potential to mobilise European wood resources even further without jeopardizing sustainability
  – Great potential in regions with large forest sector potential, but lacking infrastructure
  – Invest in infrastructure, establish local value chains

• Challenge with many small scale forest owners, fragmentation
  – Large national and regional variations in supply and use
  – Need to get mobilized, need forest owners associations, management and marketing services – MTK and puumarkkinat.fi great examples!

• Potential to increase productivity in forests

• Supply is not static! Investments in SFM – Finland great example!
Conflicts of interests because of clashing land use policy objectives
– Eg nature conservation vs. increasing demand, climate change mitigation

Increasing demand ≠ depletion of resources

For forest owners the Sustainable Forest Management is the guiding principle, which has been agreed and developed over a long time and is firmly incorporated in national legislations

Sustainability criteria for a single product is not operational – trees are not grown for a single purpose
EU Forest Policy: a complex scattered puzzle

- EU Forest Strategy
- Forest Europe
- INC LBA
- Sustainability criteria for biomass
- Biodiversity Strategy 2020
- Public procurement
- EU Timber Regulation
- LULUCF
- 2030 Climate and Energy Framework
- Renewable Energy Source Directive
- RPM Regulation
- Plant health control Regulation
- CAP post 2013 - Rural Development
- NATURA2000
- Habitat Directive
- Birds Directive
- EU Strategy on Adaptation to Climate change
- EU Timmer Regulation
- State Aid Rules
- Green Infrastructure
- No Net Loss
- ILUC
- Roadmap to a Resource Efficient Europe

7th Environment Action Programme
Invasive Alien Species Regulation
CEN sustainability criteria bio-based products
Bioeconomy Strategy
Research FP 7/ Horizon 2020
Mapping of Ecosystem Services
Water Framework Directive
SFM criteria under EUFS
Plant health control Regulation
Green Infrastructure
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Take home messages

1. Europe’s forests are growing!
2. Bioeconomy includes producers and traditional wood-working industries!
   – Ensure investments and a competitive and attractive rural sector
3. Wood mobilization depends on a number of factors – key is to create supportive frameworks
4. No EU forest policy – but many EU policies impact forests and the possibility to manage forests and supply wood
5. Joint forest sector responsibility to raise public awareness of multiple benefits of forest management and wood use
   – We are climate heroes and the forest bioeconomy is part of the solution!
Thank you!

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