

Forest Policies for the 21st Century

Sixth Executive Forest Policy Course

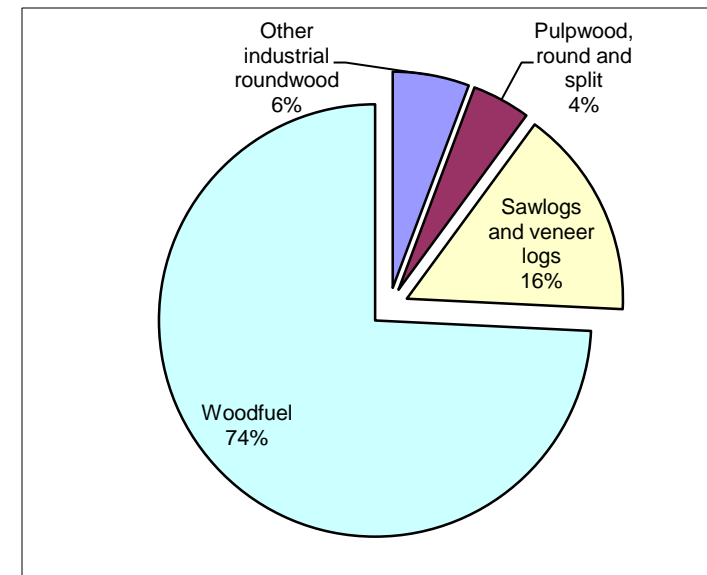
27 May - 6 June 2013, Thimphu, Bhutan

TRENDS IN THE PRODUCTION, PROCESSING AND TRADE OF WOOD PRODUCTS

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Organized by: Asia-Pacific Forest Policy Think Tank

- **Production of wood has been the thrust of most national forest policies for a long time.**
- **Most wood continues to be used as woodfuel**
- **Policies of forest rich countries have been largely focused on exports, an important source of income to government.**
- **Increasing concern about environment has led to a shift in the objectives of management with production function receiving much less attention.**



- **Distribution of population and distribution of forests are not necessarily co-terminus.**
- **Global value chains replacing local value chains. An increase in the “Wood-miles”.**
- **Changes in the demand for wood and shifts in sources of supply: Shifts from Europe to Asia and shifts within Asia.**
- **Impact of climate change policies on industrial wood consumption.**
- **Implications on policies.**

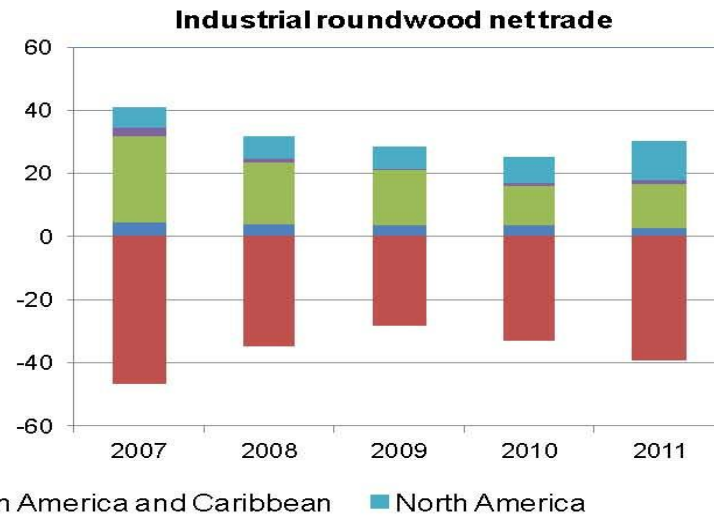
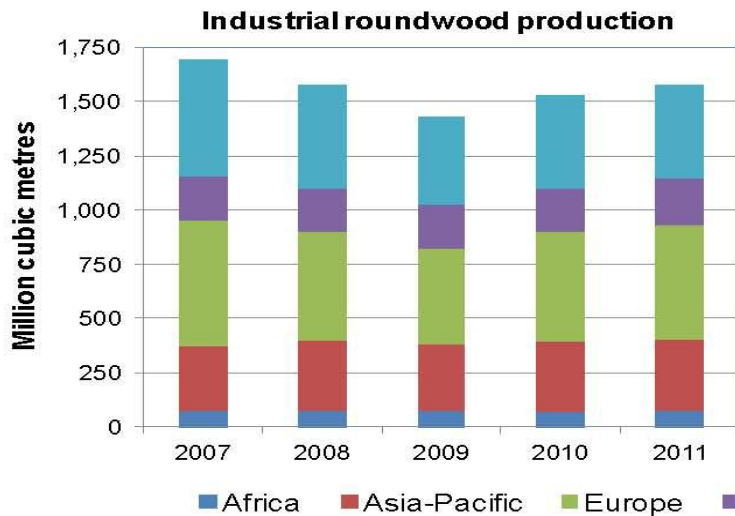
PURPOSE OF THIS SESSION

- **Provide an indication of the changes in demand and supply of wood, globally and regionally.**
- **Discuss available forecasts of future demand for wood.**
- **Analyse the impact of different policies on wood demand and supply.**
- **Assess the implications on forest policies.**

CHALLENGES IN ASSESSING PRODUCTION AND CONSUMPTION

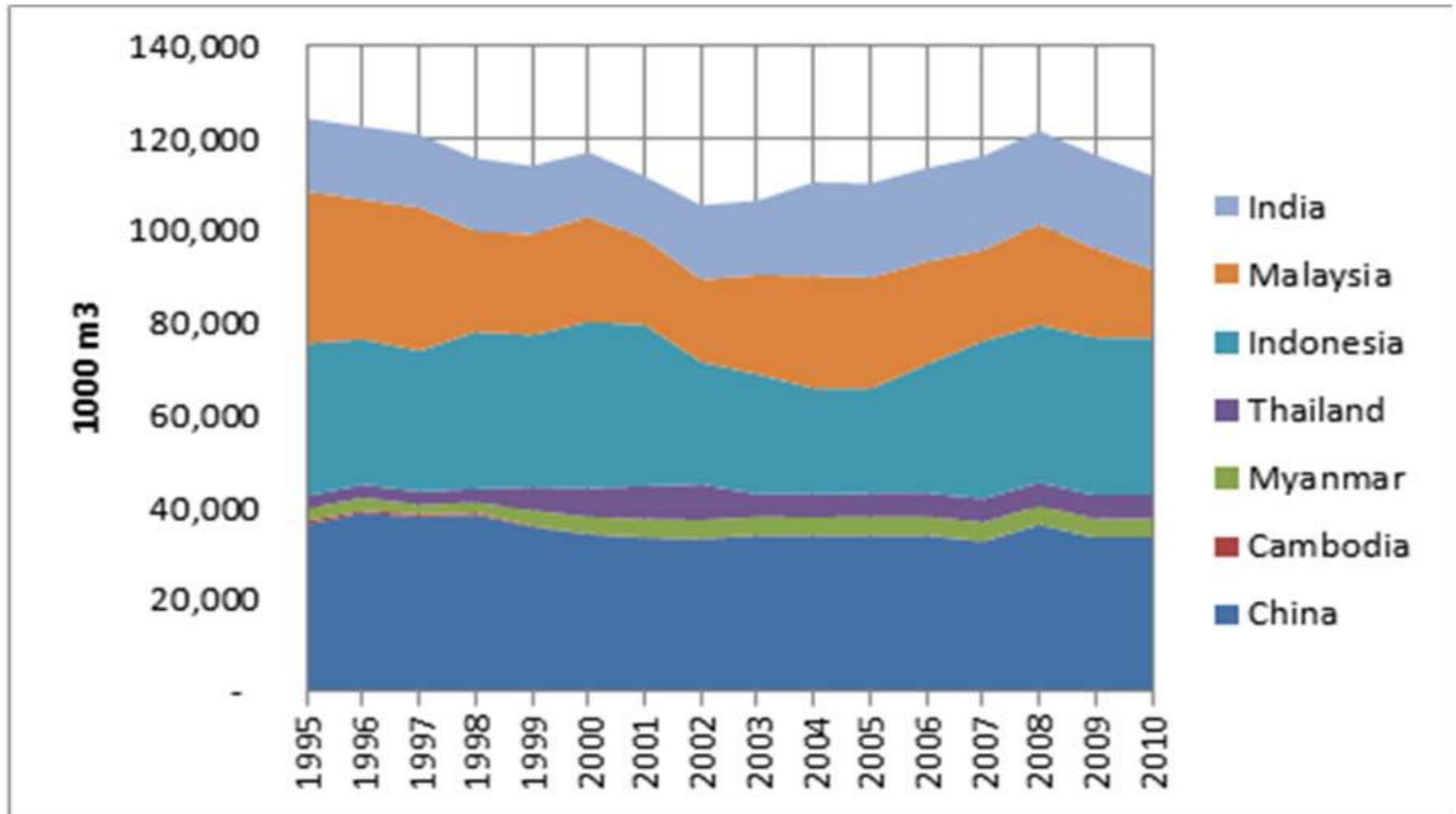
- **Considerable difficulty exists in providing reasonably accurate information on production and consumption.**
- **A significant proportion of production and consumption takes place in the informal sector which is seldom captured in the country statistics.**
- **With an increase in production from dispersed farms this is all the more challenging.**
- **Even there are challenges in assessing the quantity of timber that crosses national boundaries.**

TRENDS IN WOOD PRODUCTION



- **Industrial wood production in 2011 was 1578 million m³, far below the 2007 level of 1700 million m³.**
- **Europe and N. America will continue to be the most important producers of industrial roundwood.**
- **Asia-Pacific region remains a net importer of wood**

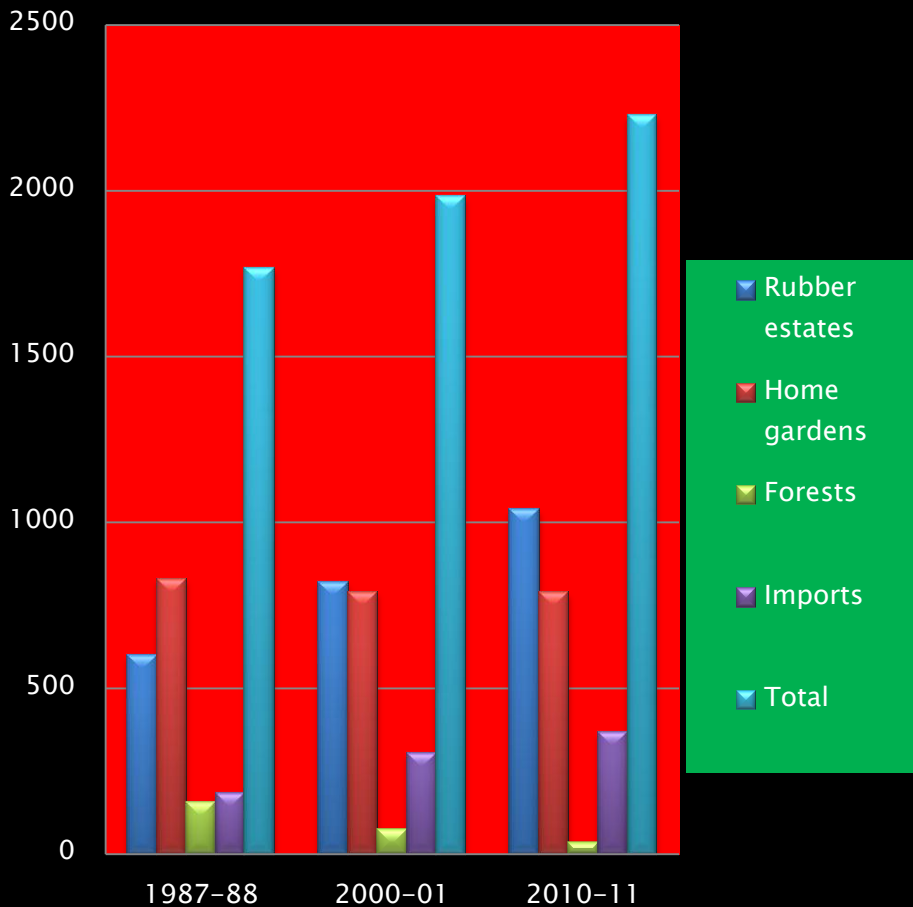
WOOD PRODUCTION TRENDS IN SELECTED COUNTRIES



Source: USAID

SHIFTS IN SOURCES OF WOOD SUPPLY

Sources of wood supply in Kerala (000 m³)



- **Increasing importance of farm wood production - Example: Bangladesh, Pakistan, India, Sri Lanka**
 - About one-fourth of the growing stock of wood in India is outside forests.
 - Wood production in low-forest cover states like Haryana, Punjab and Gujarat is almost entirely from farms.
 - Kerala is another example of increasing dependence on home gardens and rubber plantations.

HOW MUCH WOOD ARE WE CONSUMING?

Country/region	Wood stock per person/ in m3	Wood consumption/ person in m3	Timber m3/ person	Firewood m3/ person
India	4.9	0.216	0.039	0.177
China	10.00	0.244	0.100	0.144
Japan	33.2	0.193	0.189	0.004
Asia	12.32	0.257	0.072	0.185
World	58.2	0.505	0.229	0.276

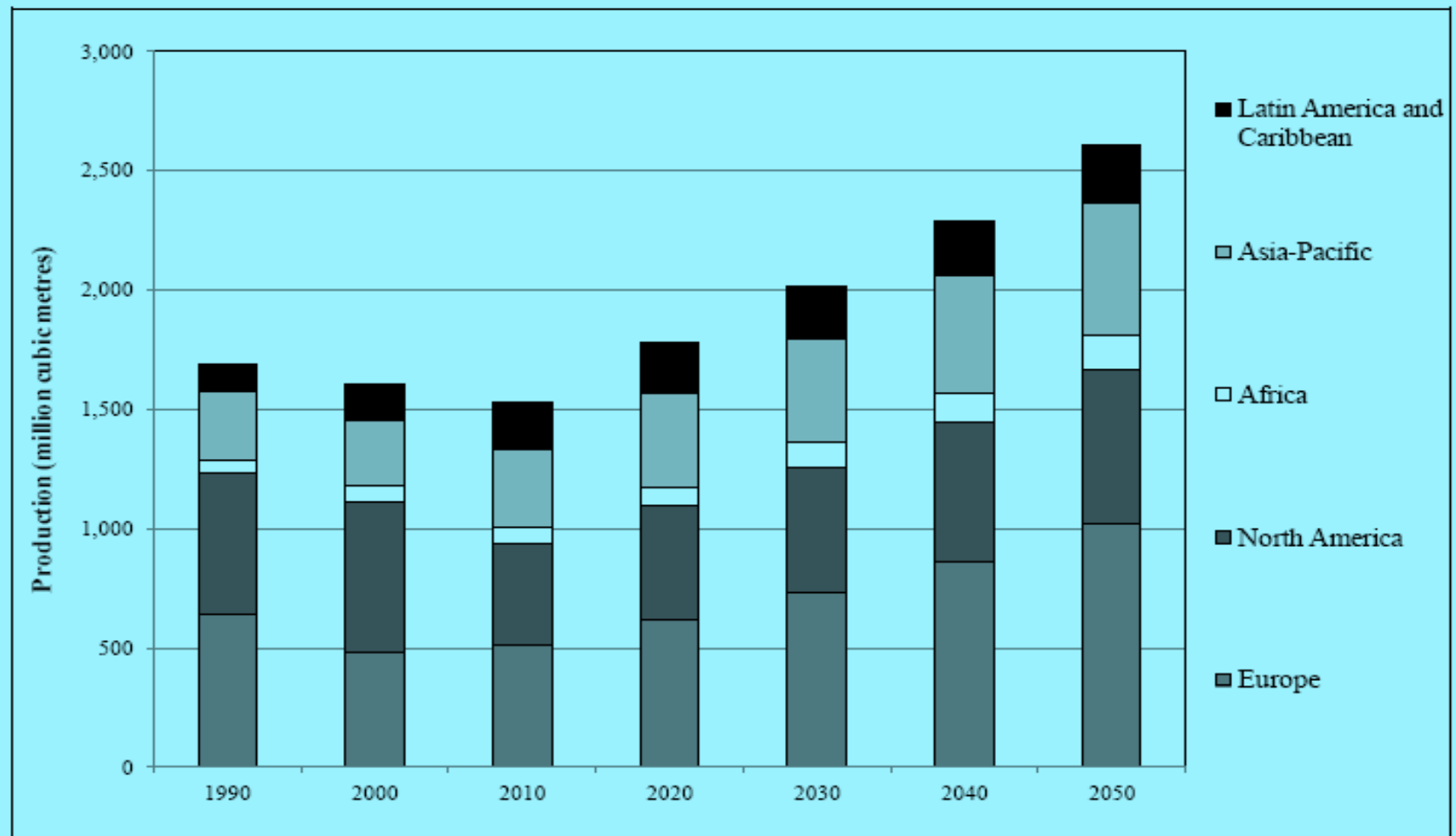
- Per capita consumption is much higher as a proportion per capita growing stock.
- A very high proportion of wood is consumed as woodfuel.

ISSUES TO BE CONSIDERED

- How long can we rely on a lower growing stock base to support the current level of consumption?
- What is the possibility of reducing firewood consumption and shifting it produce more value added wood products?
- How the per capita consumption will change over time in response to various policies/

LONG TERM FORECASTS OF PRODUCTION

Figure 8 Trends and projections for industrial roundwood production, 1990-2050



Source: trends and projections to 2030 derived from FAO (2009), with an extrapolation to 2050.

ISSUES FOR DISCUSSION

- **To what extent forest policies are addressing the issue of changes in the demand for wood and wood products?**
- **Why forest policies have been ineffective in dealing with over-exploitation of forests?**
- **What are the rationale of logging bans and log export bans? Are they fulfilling their purpose or have unintended/ unanticipated outcomes? Are such policies based on a clear assessment of the pros and cons?**
- **What are the impacts of climate change policies on wood consumption? Being an energy efficient/ environment friendly product will there be a significant increase in the use of wood substituting more energy intensive building materials?**

ISSUES FOR DISCUSSION

- **Is it possible for the government to totally move out of wood production and leave it to farm wood production or imports?**
- **If a country is to rely on farm land for wood production, what are its implications on forest and agricultural policies.**
- **How do we promote farm tree production?**
- **What are the impacts of technological changes on wood demand? How they have impacted wood use so far and what is in the horizon?**

Thank You