Joint Session of the ECE Timber Committee and the FAO European Forestry Commission

Location, Turkey – 10-14 October 2011

Russian Forest Sector Outlook Study:
Maxim Lobovikov, FAO
Previous FAO/UNECE Outlook Studies

- Asia (West & Central) 2007
- Asia (Pacific) 1996, 2011
- North America 2008, 2011
- Russian Federation ??
- South America, 2005
- Africa, 2003
- Europe 2005, 2011
- Global Outlook??
Project implementation

- UNECE/FAO Geneva 21 March 2011
- Pushkino, Russia: 12 May 2011 – developed the framework
- Supported by Federal Forestry Agency of RF (support letter 25 July 2011)
- LoA signed on 01.08.2011
- Pushkino, Russia 12 September 2011 – developed the program of implementation
- End of the project – March 2012
- Final report by 1 June 2012
- Independent expert forecast Sector till 2030
- Lead organization is VIPKLH
Project Organization

Advisory Council:
• V. Chuyko, Chair - RAO Bumprom
• M. Klinov - Minpromtorg
• E. Kulikova - WWF
• M. Smetanina - WB
• Y. Shuvaev - Chamber of Commerce of RF
• M. Lobovikov - FAO

Author's Council:
• A. Petrov, VIPKLH – Project Coordinator From the RF
• E. Akim – SPB Univ of Plant Polymers
• N. Burdin - VNIPIEILesprom
• A. Isaev – RAS, Center on Forest Ecology and Productivity
• V. Kondratyuk – State Scientific Center of Forest Cluster
• N. Moiseev – Forestry University
• A. Filipchuk - VNIILM
• J. Gerasimova (Secretary) - VIPKLH
## Study structure: block 1 – current state

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<td>1</td>
<td>State of the forest sector by 2011</td>
<td>N. Burdin</td>
<td>01.10.2011r.</td>
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<td>2</td>
<td>Forest potential</td>
<td>A. Filipchuk</td>
<td>30.11.2011r.</td>
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<td>3</td>
<td>Forecast for forest production and services on domestic and export markets</td>
<td>N. Burdin</td>
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<td>4</td>
<td>Forest use: types, volumes, allocations, economically accessible resources</td>
<td>A. Filipchuk</td>
<td>31.12.2011r.</td>
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## Block 2 – sector forecast

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<td>6</td>
<td>Development of the sector on NWPFs, social and ecological services and (including climate change)</td>
<td>A.Isaev</td>
<td>31.12.2011г.</td>
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<td>Forest reproduction, protection and conservation</td>
<td>N.Moiseev</td>
<td>01.02.2012г.</td>
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Orman 2011: Forests in a Green Economy, 10-14 October, Antalya Turkey
### Block 3 – Support and implementation strategy

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<td>8</td>
<td>State-private partnership in forest sector: leasing, concession, small business, privatization</td>
<td>V.Kondratyuk</td>
<td>01.02.2012г.</td>
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<td>Development of forest policy, including certification and illegal logging issues</td>
<td>A.Isaev</td>
<td>01.03.2012г.</td>
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<td>10</td>
<td>Measures of the state support to the forest sector (stimulation of production and consumption of forest products and services)</td>
<td>V.Kondratyuk</td>
<td>01.03.2012г.</td>
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<td>11</td>
<td>Scientific support and personnel supply</td>
<td>V.Sanaev</td>
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<td>Forest investments</td>
<td>V.Kondratyuk</td>
<td>01.03.2012г.</td>
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<td>13</td>
<td>Social and economic dynamics of the forest sector till 2030. Place and role of the Russian Federation in the global forest sector</td>
<td>A.Petrov</td>
<td>15.03.2012г.</td>
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<td>14</td>
<td>Report submission</td>
<td>A.Petrov</td>
<td>01.06.2012г.</td>
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Report structure

11 → 13 → 12

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Project partners

National

- Centre on the problems of ecology and productivity of forests, CEPF
- Chamber of industries and commerce, TPP
- Federal Forestry Agency, Rosleshoz
- Ministry of industries and commerce, Minpromtorg
- National Research and Design Institute for Economics, Production Management and Information in the Forest, VNIPIEILesprom
- RAO Bumprom
- Russian Research Institute of Forestry and Mechanization, VNIILM
- State Scientific Center on Forest Cluster, GNC LPK
- State University of Plant Polymers – SUPP

International:

- EBRD, EFI, FAO, Greenpeace, IIASA, UNECE, WB, WWF
Project scenarios

Project scenarios across the Outlook studies are to be compatible to comprehend the global picture
• Inertial scenario
• Innovation
• Intermediate
Project methods

Project methods should also be compatible
• Resources modeling (VNIILM model)
• Industries modeling (VNIPIEI, EFI-GTM)
Thank you!