ECONOMIC COMMISSION FOR EUROPE
Timber Committee

FOOD AND AGRICULTURE ORGANIZATION
European Forestry Commission

Distr.
GENERAL

TIM/SEM.1/2003/R.4 (Summary)
18 December 2002

Original: ENGLISH

Seminar on
STRATEGIES FOR THE SOUND USE OF WOOD
Poiana Brasov, Romania
24-27 March 2003

Future wood availability for the European wood-based industries

Session I

Paper by Mr. Bernard de Galembert,
Forest Director, Confederation of European Paper Industries (CEPI)

Summary

Today's situation regarding forests and wood in Europe is such that thanks to sustainable forest management, and to sustainable wood usage practices, the net annual forest increment (793 million m³ over bark) is much higher than the annual felling rate (418 million m³ over bark). In fact, over the past 10 years the forests on the European continent, including the European part of Russia, have increased by 9 million hectares, and now cover 1,039 million hectares – meaning, 27% of global forestland. These figures show that there is enough wood available in European sustainably-managed forests and the resource is even increasing.

However, due to government policies, landowners' attitudes, technical and economical accessibility, environmental considerations and market conditions, the mobilisation of wood is now limited and therefore these should be taking into consideration. It is important that the wood-based industries have access to this economic wood supply in a sustainable manner.

Even though consumption forecasts for paper and board are steadily growing at an average rate of 2% per year, even with improved technology, a higher recycling rate and more efficiency, the need for wood will also increase. When looking at the three developments (increased use of biomass for energy production, enhanced carbon sequestration via forest management measures, closer to

nature forest management) which could threaten its mobility, the industry could face a lack of wood as raw material in the years to come because it cannot be supplied efficiently. For all those reasons, CEPI has made a study, based on the runs of the EFISCEN model, aiming at assessing the future availability of roundwood in the coming decades. This study indicates that the expected shortfall in Europe would be 50 million m³/year by 2020, 80 million m³/year by 2030 and 193 million m³/year by 2060. It shows also that wood imported from Russia would not have a significant impact in reducing the shortfall in the near decades.

Bearing these figures in mind, the industry is developing a strategic vision in order to safeguard the wood availability in terms of quantity, quality and cost while further improving the industry's sustainability credentials. The industry and its partners needs to become more cluster-minded. All members of the cluster need to improve logistics and logging practices, share experiences and knowledge, further improve the recycling rate, harvest more residues in an environmentally sustainable way, and invest more in R&D. But other stakeholders - decision-makers, Environmental NGOs - need to contribute as well, thereby taking up the message from Johannesburg.

Key words: wood availability, renewable energy, climate change, close to nature forest management, shortfall, wood mobilisation, partnerships

-----