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TIMBER COMMITTEE

Sixty-fifth session
Geneva, 8-11 October 2007

REPORT OF THE TIMBER COMMITTEE ON ITS SIXTY-FIFTH SESSION

Summary

UNECE/FAO in a changing international environment: The Committee expressed its appreciation of the close cooperation on European forestry issues between the UNECE Timber Committee (TC), FAO European Forestry Commission (EFC) and the Ministerial Conference on the Protection of Forests in Europe (MCPFE). It welcomed the joint preparation of the Pan-European Forest Week, 20-24 October 2008, in cooperation with other partners, as a major opportunity to demonstrate this cooperation and to reach out to other sectors (paras. 13-17).

Planning for the 2007-08 Strategic Review: The Committee endorsed the proposed methodologies and timing for the "Strategic Review and Plan" and requested the secretariat to table proposals for a Strategic Plan for the period 2008-2013 for consideration at the TC/EFC Special Session, 28-30 April 2008 (paras. 18-20).

Planning for the performance evaluation of the 2008-2009 programme of work: The Committee reviewed and agreed on the framework for UNECE biennial evaluations 2008-2009 and the UN strategic framework 2010-2011, subject to revision of the Strategic Review (paras 21-22).

Market developments in 2007 and prospects for 2008: The Committee's discussions highlighted increasing wood energy use, the decline of softwood markets in North America, positive market developments in Europe and Russia and the growing influence of China on the world's markets (paras. 23-25).

UNECE/FAO Policy Forum: opportunities and impacts of bio-energy policies and targets on the forest and other sectors: The discussions during the Policy Forum highlighted wood energy policies and developments, current and potential wood availability and mobilisation and the cross-sectoral dimension. The Committee requested the secretariat and countries to analyse and improve the data availability on wood resources and energy targets (paras 26-27 and annex I).

The Committee reviewed its activities and approved its programme of work for 2008 (paras. 28-30 and annex II).

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I. Introduction

1. The UNECE Timber Committee held its sixty-fifth session at Geneva from 8 to 11 October 2007. The session was attended by representatives of Austria, Belarus, Belgium, Canada, Czech Republic, Denmark, Estonia, Finland, France, Germany, Ireland, Italy, Latvia, Luxemburg, the Netherlands, Norway, Poland, Portugal, Romania, the Russian Federation, Serbia, Slovakia, Spain, Sweden, Switzerland, Turkey, Ukraine, United Kingdom of Great Britain and Northern Ireland, the United States of America, and Uzbekistan. Representatives from Australia, Brazil, Cameroon, China, and Morocco also attended the session.

2. Representatives of the European Commission attended the session. The Liaison Unit Warsaw of the Ministerial Conference on the Protection of Forests in Europe (MCPFE) was also represented.

3. Representatives from the Food and Agriculture Organization of the United Nations (FAO), and the secretariat of the UN Forum on Forests (UNFF) attended the session. The European Forest Institute (EFI), the International Tropical Timber Organization (ITTO), the International Panel on Climate Change (IPCC), the World Trade Organization (WTO), and the World Conservation Union (IUCN) were also represented.

4. The following international non-governmental organizations were represented: American Forest and Paper Association, Association Aquaverde, Centre du Commerce International pour le Développement (CECIDE), Confederation of European Paper Industries (CEPI), European Landowners' Organization (ELO), European Observatory of Mountain Forests, European Network of Forest Entrepreneurs (ENFE), European Organisation of the Sawmill Industry (EOS), European Panel Federation (EPF), European State Forest Association (EUSTAFOR), Forest Stewardship Council (FSC), International Union of Forest Research Organizations (IUFRO), Programme for the Endorsement of Forest Certification Schemes (PEFC), Ramsar Convention on Wetlands, World Wide Fund for Nature (WWF).

5. Mr. J. Dengg (Germany), Chairman, opened the session. Mr. M. Belka, Executive Secretary of UNECE, welcomed the delegations and addressed the session. Mr. W. Killmann, Director, Forest Products and Industries Division, FAO, also addressed the session.

II. Adoption of the agenda (Agenda item 1)

Documentation: ECE/TIM/2007/1

6. The provisional agenda (ECE/TIM/2007/1) was adopted with some changes in the timetable.

III. Matters arising from the sixty-second session of the Commission (Agenda item 2)

Documentation: ECE/TIM/2007/2

7. Ms. V. Cram-Martos, Director, UNECE Trade and Timber Division, briefed the Committee on the outcomes of the sixty-second session of the UN Economic Commission for Europe, the 60th anniversary session, through which the achievements of the UNECE were

acknowledged. The implementation of the UNECE reform had moved forward at a rapid pace and the three main reform recommendations related to the Timber and Forestry subprogramme were being consistently implemented. The Committee welcomed the development of intersectoral activities, the progress of its work on policies and institutions, as well as the important strengthening of its partnership with the MCPFE.

8. The Committee was informed that its Chairman would meet with the UNECE Executive Committee on 25 October 2007, to brief it on the outcome of the session.

9. The Committee was briefed on the development of cooperation with other UNECE bodies such as the Committee on Sustainable Energy, the Committee on Environmental Policy and the UNECE Convention on the Protection and Use of Transboundary Watercourses and International Lakes ("Water Convention"). It thanked Mr. G. Sambucini, UNECE Sustainable Energy Division, Mr. O. Dzioubinski and Ms. Ella Behlyarova, UNECE Environment, Housing and Land Management Division, for their interventions. The Committee welcomed the strengthening of the cross-sectoral dimension of its work. It affirmed the necessity for the forestry sector to keep abreast of relevant developments in other sectors and urged the secretariat to develop further the linkages with other sectors such as energy, environment, and water.

10. The Committee was informed of the recommendations by the EE21 Steering Committee to explore how the current cooperation on wood energy and bio-fuels, notably in the Western Balkans, could be enhanced and formulated as a sub-regional project of Energy Efficiency 21, notably in the context of the Swiss Re Investment Fund and a EE21 Investment Fund in Eastern Europe. The Committee welcomed the operational partnership between the Timber Section and the Sustainable Energy Division, encompassing mutual access to networks and information sharing, among others on the issue of biofuels. The Committee noted positively the organization of a session on biofuels by the Committee on Sustainable Energy, in cooperation with the Timber Section.

11. The Committee was informed of the Environment for Europe process and the Belgrade Ministerial Conference, associated environmental assessment reports and the adoption of environmental policy instruments. The Committee noted with interest the Environmental Performance Review (EPR) programme, mandated by the UNECE Committee on Environmental Policy, which includes some forestry-related components. It took special interest in the comprehensive review procedure associated with EPRs, a best practice worth considering during the Strategic Review process for possible adoption for the forest sector country profiles, taking into account resource considerations.

12. The Committee took note of the adoption of the "Recommendations on Payments for Ecosystem Services in Integrated Water Resources Management" in November 2006, elaborated in cooperation with the Timber Section and the initiation of capacity building activities to implement these recommendations. The Committee noted the possibility of organizing joint events with the UNECE Water Convention in the context of the Pan-European Forest Week in October 2008. It encouraged the secretariat to further develop the cooperation with the Water Convention on these projects.

IV. UNECE/FAO in a changing international environment: briefing and discussion of recent developments (Agenda item 3)

Documentation: ECE/TIM/2007/3

13. The Committee considered its role and strategic direction in the light of the changing international environment, and on the basis of briefings on activities of the Food and Agriculture Organization (FAO, Mr. W. Killmann), the Ministerial Conference on the Protection of Forests in Europe (MCPFE, Mr. P. Borkowski), the UN Forum on Forests (UNFF, Mr. P. Csoka) and the International Tropical Timber Organizations (ITTO, Ms. F. Maplesden).

14. The Committee was informed of and welcomed the work related to the forest/climate change/agriculture nexus and bioenergy undertaken by FAO. In addition to the UNECE/FAO Policy Forum on Bioenergy Policies, a special event during the FAO Conference on 20 November 2007 and the FAO High Level Event on Climate Change, food security and bioenergy in June 2008 will consider this issue. It was also informed that cooperation is being strengthened with Russia, which re-joined FAO this year.

15. The Committee was informed of the work of the MCPFE (P. Borkowski), which would culminate in 2007 with the Warsaw Ministerial Conference under the motto "Forests for quality of life." Close ongoing cooperation between UNECE and MCPFE resulted in the implementation of the 2004-2007 MCPFE programme of work. The Committee took note of and expressed its appreciation for the close framework of cooperation in the Pan-European forestry sphere between the three partner organizations UNECE, FAO and MCPFE, which is regarded as beneficial and fruitful. It requested the bureaux of the Timber Committee and European Forestry Commission and the MCPFE General Coordinating Committee to work towards the advancement of this cooperation, for example through joint meetings, as necessary. The Committee regarded the Pan-European Forest Week, jointly prepared by the UNECE Timber Committee, FAO European Forestry Commission and MCPFE, in close cooperation with other partners, as a major opportunity to demonstrate the excellent cooperation on Pan-European forestry matters and to communicate with other sectors. It urged the secretariat to explore any potential synergies between the work of all three bodies, which may arise in the context of the Strategic Review process and which coincides with the development of the work programme arising from the MCPFE Ministerial Conference in Warsaw, 5-7 November 2007.

16. Mr. P. Csoka (UNFF) informed the Committee of the new Non-Legally Binding Instrument (NLBI) on all types of forests, adopted at the UNFF in April 2007. He also briefed the Committee on UNFF's Multi-Year Programme of Work (MYPOW) for the period 2007-2015, focusing on the achievement of the four global objectives on forests and the implementation of the NLBI. The Committee took note of the invitation to regional and sub-regional forest related instruments and processes to address agenda items planned for forthcoming sessions of UNFF, as well as the opportunity for regions to contribute to the consideration of emerging issues.

17. The Committee was informed of ongoing cooperation with the International Tropical Timber Organization (ITTO), which was welcomed. Collaboration in the collection and exchange of statistics has proven useful in the past, as has the cooperation in the drafting and

review of the tropical timber chapter of the UNECE/FAO Forest Products Annual Market Review. Future opportunities for collaboration encompass statistical training workshops, and the exchange of relevant information to improve the quality of statistical reporting.

V. Planning for the 2007-08 Strategic Review (Agenda item 4)

Documentation: ECE/TIM/2007/4

18. The Committee reviewed a draft plan for the implementation of the Strategic Review and Plan (Annex to ECE/TIM/2007/4), endorsed the proposal and asked the secretariat to implement it as proposed. In particular, it agreed that the process should be called “Strategic Review and Plan” (to stress the operational and forward looking side), and approved the main principles listed in the document. It also agreed that the new strategic plan should cover the period 2008-2013, to achieve alignment with the UN biennial planning framework.

19. The Committee agreed that the main occasion for discussion and approval of the strategic plan should be a special session of the Timber Committee and the European Forestry Commission to be held 28-30 April 2008 in Geneva. The agreed strategic plan should be endorsed by the joint session of the Committee and the Commission in the framework of the Pan-European Forest Week, to be held 20-24 October 2008 in Rome and presented at this occasion.

20. The Committee welcomed the emphasis given to measuring the utility of the subprogramme’s outputs, as a guide to decision making and was informed of the results of a survey of the users of the subprogramme’s outputs conducted in May-September 2007. The Committee welcomed this approach, as well as other efforts to measure the subprogramme’s utility such as analysis of downloads or citations. It agreed that the user survey should be input to the strategic review process and took note of the secretariat’s initial responses to the user survey, in particular the action being taken to improve the website. It recommended that sufficient response time be given to stakeholders to reply to the questionnaire.

VI. Planning for the performance evaluation of the 2008-2009 programme of work (Agenda item 5)

Documentation: ECE/TIM/2007/5

21. The Committee was informed of the planned performance evaluations of the subprogramme on timber and forestry, notably for the purpose of UNECE biennial evaluations in the 2008-2009 biennium. The Committee reviewed and agreed on an evaluation plan for 2008-2009 with expected accomplishments and indicators of achievement (annex I of ECE/TIM/2007/5), subject to revision by the special session on the strategic review and plan for the subprogramme to be held in April 2008.

22. In addition, the Committee reviewed the proposal for the strategic framework for 2010-2011 for the subprogramme prepared in the context of the United Nations programme performance cycle (annex II of ECE/TIM/2007/5), before its submission to the Executive Committee in autumn 2007 and UN headquarters thereafter. This strategic framework was also approved, subject to revision in the light of the results of the special session in April 2008.

VII. Market developments in 2007 and prospects for 2008 (Agenda item 6)

Documentation: ECE/TIM/2007/6

23. For the first time, the Committee held joint market discussions with the International Softwood Conference. The Committee reviewed developments in forest products markets as reported in the Forest Products Annual Market Review, 2006-2007, as well as experts' presentations, country market statements and forecasts. The main themes of the discussions were "softwood markets" and "wood energy and wood mobilization". The session approved a market statement for subsequent publication in a UNECE press release for wide distribution via its website (www.unece.org/trade/timber). Both the Committee and the Conference noted the advantages of this meeting of policymakers and the wood industry, and expressed the desire to meet together again.

24. The Committee thanked these experts for the analytical presentations which were made during the session and can be found on its website: Dr. James Bowyer, Dovetail Partners, United States; Mr. Russell Taylor, International Wood Markets Group, Canada; Mr. Jarno Seppälä, Pöyry Forest Industry Consulting, Finland; Mr. Nicholas Kent, North American Wholesale Lumber Association, United States; Mr. Dieter Kainz, Stora Enso, Austria; Mr. Jan Nico Wilkens, Pont Meryer N.V., Netherlands; Mr. Andrey Prokopov, Russian Timber Exporters Union, Russia; Mr. Claude Boulanger, Matériaux Blanchet, Canada; Dr. Wenming Lu, Chinese Academy of Forestry, China; Mr. Andy Roby, Timber Trade Federation, United Kingdom; Mr. Sylvain Labbé, Quebec Wood Exporters Bureau, Canada; Dr. Jean Luc Sandoz, CBT-CBS Consulting, Switzerland; Mr. Filip De Jaeger, European Confederation of Woodworking Industries, Belgium; Dr. Robert Shelburne, UNECE; Mr. Hakan Ekstrom, Wood Resources International, United States; Dr. Chris Gaston, FPInnovations-Forintek, Canada; Dr. Holger Miltz, Georg August University, Germany; Ms. Catherine Mater, Mater Engineering, United States; Ms. Bénédicte Hendrickx, European Panel Federation, Belgium; Mr. Laslo Döry, European Panel Federation, Belgium; Mr. Rod Wiles, Broadleaf Consulting, United Kingdom; Mr. Rupert Oliver, Forest Industries Intelligence, Ltd., United Kingdom; Ms. Frances Maplesden, International Tropical Timber Organization, Japan; and Mr. Bernard de Galember, Confederation of European Paper Industries, Belgium.

25. The Committee discussed overarching market and policy developments in the UNECE region, namely:

- (a) increasing wood energy use
- (b) the decline of forest products markets in North America, dramatically for sawn softwood, due to the crash in the US housing market
- (c) positive market developments in Europe and Russia, and
- (d) China's growing influence on world's timber markets (in both imports and exports).

VIII. UNECE/FAO Policy Forum: opportunities and impacts of bio-energy policies and targets on the forest and other sectors (Agenda item 7)

Documentation: ECE/TIM/2007/7

26. A policy forum on the above subject took place on 10 October. It addressed wood energy policies and developments, current and potential wood availability and mobilisation, and the

cross-sectoral dimension of this topic. The Committee welcomed the policy forum and thanked speakers and participants. It took note of the Chairman's summary of the forum's conclusions (annex I). The Committee further noted that the information brought together at the forum was of great interest and requested that it be widely disseminated, probably as an ECE/FAO Discussion Paper.

27. In particular, the background paper on "Wood Resource Availability and Demand - Implications of Renewable Energy Policies" had demonstrated the feasibility of obtaining realistic estimates of future supply-demand balances for wood in Europe which took account of renewable energy targets. The Committee considered the wood balance approach used in the background paper to be a useful analytical approach which could serve also for other studies. However, the data presented required careful checking and review of the assumptions on which they were based. It requested the secretariat to follow up the policy forum in the following ways:

- (a) Countries are encouraged to review the estimates for the wood balance in 2005 and the targets for wood energy in 2010 and 2020, as reflected in the background paper on "Wood Resource Availability and Demand - Implications of Renewable Energy Policies"; and transmit comments and corrections to the secretariat before 30 November 2007. Those responsible for energy targets and policies should be involved in this review. To initiate this process, the secretariat should address formal requests to national authorities in the countries.
- (b) Countries are encouraged to carry out empirical studies on their national wood balances, quantifying relevant sources and uses, and focusing on areas where data are missing or of poor quality, notably recovered wood, unrecorded removals, use of wood for energy and conversion factors (raw material/product).
- (c) Countries are encouraged to analyse the sustainable level of wood supply at the national level, taking account of all the factors influencing wood supply enumerated in the above-mentioned background paper; and send the results to the secretariat.
- (d) The secretariat, with the partners in the Task Force on Wood Availability and Demand, should consider the possibility of organising a workshop with national experts to compare and review the updated balances and the studies of sustainable wood supply. It is envisaged that this workshop take place in March 2008, if possible.
- (e) The Working Party on Forest Economics and Statistics at its session in 2008 should review and guide this work. The secretariat should continue to work closely with partners such as the European Commission and the University of Hamburg, as well as civil society, the private sector and member states. National and international organizations might consider funding this timely and important work. In this context, the Committee was informed of an information note prepared by the Task Force on Wood Availability and Demand, setting out proposals for future work on monitoring and forecasting wood resources and demand.

IX. Review of activities since the sixty-fourth session and programme of work to 2008 (Agenda item 8)

Documentation: ECE/TIM/2007/8

28. The Committee reviewed its activities since the sixty-fourth session and programme of work to 2008, the list of outputs, and activities of the teams of specialists. The Committee endorsed the integrated programme of work through 2008 (annex II) and the outputs planned for 2007-2008.

29. The Committee reviewed and commented on the draft accomplishment accounts for the biennium 2006-2007.

30. The Committee requested the secretariat to reflect its recommendations in the expected accomplishments for the future, namely that the sound use of wood encompasses both the raw material as well as the renewable energy aspect.

X. Election of officers (Agenda item 9)

31. The Committee re-elected the current officers, first elected at its sixty-fourth session, Mr. Johann Dengg (Germany), Chairman, and Messrs. Heikki Pajuoja (Finland) and Branko Glavonjic (Serbia), Vice-Chairmen to hold office until the end of the sixty-sixth session. It thanked the officers for their contribution to the Committee's work as Chairman and Vice-chairmen.

XI. Any other business (Agenda item 10)

32. None.

XII. Date and place of next session (Agenda item 11)

33. A special session of the Timber Committee and the FAO European Forestry Commission will be held from 28-30 April 2008 in Geneva, to decide on the outcome of the strategic review process and agree on the programme of work until 2013.

34. The Committee agreed that the regular joint meeting of the Committee and the European Forestry Commission should take place as part of the Pan-European Forest Week which will take place from 20-24 October 2008 at FAO headquarters in Rome, with a proposed one day event in Brussels, in view of communication with representatives from different sectors. This major event, to take place under the auspices of UNECE, FAO, MCPFE and the European Communities, is being prepared by an organising committee, under the guidance of the bureaux, the MCPFE GCC and the EU authorities. The integrated programme of work, agreed by the Special Session of the Timber Committee and European Forestry Commission, 28-30 April 2008 in Geneva, will be endorsed by, launched and presented at the joint session at the Pan-European Forest Week.

XIII. Adoption of the report (Agenda item 12)

35. The Committee adopted its report on the basis of a draft prepared by the secretariat.

ANNEX I

UNECE/FAO Policy Forum

Opportunities and Impacts of Bioenergy Policies and Targets on the Forest and Other Sectors

What is the future contribution of wood to meeting UNECE region's energy needs?

CHAIRMAN'S SUMMARY

1. Wood is currently the most important utilised source of renewable energy in the UNECE-region.
2. In many countries, policy, institutional and economic measures promote renewable sources to tackle the challenges of secure energy supply and climate change mitigation, leading to a rapidly increasing demand for wood.
3. Overall energy efficiency and efficient wood use are essential to approach renewable energy objectives.
4. Policies rarely define the share of wood in renewable energy supply. Clear bioenergy policy goals would help defining the role of forests in energy supply.
5. Analysis of energy policies lead to the assumption that huge amounts of wood are needed in the future to fulfil these targets, and are likely to exceed sustainable domestic supply. Forecast use, assuming the energy targets, is higher than forecast supply, although the size of the difference is open to discussion.
6. Levelling out the amount of wood required to fulfil energy objectives and support a growing wood-processing industry and the sustainable supply of wood, is a major challenge in order to increase the share of renewables without jeopardizing the existence of wood-processing industries.
7. Sustainable mobilisation of wood resources requires, in particular, overcoming legal and institutional constraints (e.g. forest ownership structures), access to data, forest infrastructure, adequate prices for wood, etc., as well as motivating forest owners to utilise their forests. Supportive laws, regulations and policies are needed, as well as information and the motivation of forest owners and other actors, especially entrepreneurs.
8. European forest owners see a potential to increase the harvest from currently underused areas substantially, and by further increase wood supply through improved silvicultural methods.
9. Forest-based industries may serve as an enabler to help meet renewable energy targets.
10. Policies to promote renewable energy should have a holistic approach between sectors, balancing potential of new markets with existing markets, and be targeted at national and sub-national levels in relation to both resources and needs.
11. Traditional analysis of wood supply and demand, centred on wood removals from forests and wood input to industries is no longer fully adequate. Therefore, an up-dated, more complex approach, based on comprehensive wood resource balances, is necessary. Many

of the elements for such a wood resource balance are already available, even at the international level, but several other elements need original research and data gathering, notably the following:

- (a) Unrecorded sources of wood supply and use (trees outside the forest, logging residues, and post-consumer recovered wood on the supply side, as well as wood use for energy, in particular in private households and small combined heat and power (CHP) plants, on the wood use side)
 - (b) Incompleteness of existing forest inventories
 - (c) Input/output conversion factors for wood-using industries (inaccuracies in this respect could significantly increase, or decrease, the estimated “gap” between supply and use of wood).
12. The concept and level of sustainable wood supply needs re-examination. Net annual increment, although vitally important, is not a sufficient indicator by itself of what is a sustainable level of supply; age structure, ownership, location and infrastructure, biodiversity conservation and protection needs, quality aspects, employment and other features must all be considered.
13. Potential wood supply from sources outside the forest (woody biomass outside the forest, wood residues and post consumer recovered wood) can play an important role in future wood supply as well. Their potential should be analysed on a national level, and data gathered internationally.
14. A level playing field between agricultural and forest biomass has to be assured, as well as between imported and domestic biomass.
15. Decisions on future land use will be crucial for food supply, supply of wood and non-woody biomass and nature conservation.

ANNEX II

**FAO EUROPEAN FORESTRY COMMISSION AND UNECE TIMBER COMMITTEE
INTEGRATED PROGRAMME OF WORK ON FORESTS AND TIMBER, 2005 - 2008**

Work area 1 Markets and Statistics	
	<i>Programme elements</i>
1.1	Statistics on production, trade, consumption and prices of forest products
1.2	Analysis of markets for forest products, notably topical and policy relevant aspects
1.3	Capacity building for forest products marketing in countries in transition
1.4	Monitoring and analysis of markets for certified wood products
1.5	Statistics on forest fires
1.6	Team of Specialists on Forest Products Markets and Marketing
Work area 2 Forest resource assessment and indicators of sustainable forest management in the region	
	Programme elements
2.1	Indicators of sustainable forest management in the region
2.2	Regional contribution to global Forest Resource Assessment
2.3	Support to development of national systems for forest monitoring
2.4	Team of Specialists on Forest Resource Assessment and C&I for SFM
Work area 3 Sector outlook studies: analysis and follow-up	
	Programme elements
3.1	Implementation and follow up of European Forest Sector Outlook Study (EFSOS) to be determined
3.2	Forest relevant cross-sectoral issues at the pan-European level
3.3	Sector policy aspects of increased use of wood energy
Work area 4 Social and cultural aspects of forestry	
	Programme elements
4.1	Role of women in forestry
4.2	The social dimension of sustainable forest management in Europe, e.g. safety and health aspects
4.3	Role of contractors
Work area 5 Policy and cross-sectoral issues	
	Programme elements
5.1	Contribution to the regional dimension of the global dialogue
5.2	Monitoring recent developments in policies and institutions
5.3	Trends in policies and institutions for the sector in CIS and south east Europe
5.4	Trade and environment issues:
	5.4.1 – extent and cause of illegal logging and trade
5.5	Forest fires
5.6	Sectoral and cross-sectoral communication
5.7	Preparation of forest and forest products country profiles
	Team of Specialists on CIS/South East Europe