



## 34th Session Joint FAO/UNECE Working Party on Forest Statistics, Economics and Management

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### Guidance on Work Area 3:

### Forest Sector Outlook

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## Activities

- The European Forest Sector Outlook Study II (EFSOS II) was published in September 2011
- A series of Discussion Papers accompany EFSOS II, providing more details on methods and findings. These are:
  - Economic Modeling and Projections of Wood Products Demand, Supply and Trade in Europe
  - The Method of the Wood Resource Balance
  - Analyzing the impacts on the European forest sector of increased use of wood for energy
  - European forest resource development
  - Competitiveness of the European Forest Sector
- The North American Forest Sector Outlook Study (NAFSOS) has been completed and is available electronically at:  
<http://www.unece.org/forests/outlook/outputs>
- The FAO/UNECE Russian Federation Forest Sector Outlook Study (RFFSOS) should be finalized and published in mid-2012



## Dissemination and outreach

During 2011-12, presentations to national or international professional meetings were made. EFSOS II was presented at:

- Informal Meeting of the EU Forestry and Nature Directors General held in Ryn, Poland, 28-29 September 2011;
- Fifteenth meeting of the Subsidiary Body on Scientific, Technical and Technological Advice of the United Nations Convention on Biological Diversity (CBD SBSTTA 15), held in Montreal, Canada, 7-11 November 2011;
- National Forest Policy Dialogue: from International Perspectives to National Policy held in Paris, France, 8 December 2011;
- Forests 2030: Policy Talk on the Future of Forests in Europe and North America” held in Geneva, Switzerland, 13 December 2011;
- European Commission Biomass Sustainability Criteria - Informal Member States meeting held in Brussels, Belgium, 23 January 2012;
- WWF Bioenergy webinar, 7 February 2012;
- European Pellet Conference held in Wels, Austria, 29 February 2012;
- Latvian Ministry of Agriculture “Iepazisties-koks” event held in Riga, Latvia, 2 March 2012





# Dissemination activities

www.timber-online.net

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## EVROPSKÁ VÝHLEDOVÁ STUDIE LESNICKÉHO SEKTORU

Forest Sector Outlook Study II) predikuje vývoj celého  
2030, a to jak z pohledu budoucích zdrojů dřeva, tak  
tí, které vydala Dřevařská sekce Evropské hospodářské  
únny nebo pravděpodobný vývoj lesnického  
tendů. Tato výhledová studie vznikala od roku 2009,  
tý, až do roku 2011, kdy byla její finalní podoba  
Timber Committee 10.-14. 10. 2011 v Turecku.  
na stránkách Lesnické práce, chceme lesnickou veřejnost  
o a dřevozpracujícího sektoru, tak jak byly vymodelovány  
politiky jednotlivých států Evropy v porovnání se základním

pošta scénářů.  
byly definovány  
východiska hospodář-  
ství Evropy. Pro  
jak vývoj hlav-  
(plocha, přírůst,  
ekonomických úka-  
schod). U všech  
lich udržitelnost  
trí a indikátorů  
ulování lesů.

ské politiky

Illustrace lesa: Jan Přibec

v budoucnosti, ale umožňují nám porozumět  
chování systému jako celku a tomu, jak může  
být ovlivněn.

**Maximalizace účinku v biomase**  
Maximalizace účinku v biomase je prvním  
ze čtyř scénářů hospodářské politiky. Těmto  
scénář se zabývá otázkou, kolik uhlíku by  
mohlo být uloženo v evropských lesích při  
změně půstních metod, ale při současném  
zachování dřevní uhlí, tak aby se byly ovliv-  
něny dodávky dříví pro souvazující odvětví.  
Volbou tohoto scénáře může lesnický sektor  
maximalizovat svůj příspěvek ke zmitování  
(mitigaci) dopadu změny klimatu. Nejlepší  
strategii, jak toho dosáhnout, je shodná kom-  
binace metod hospodářské úpravy lesa, která  
zvýší akumulaci uhlíku v lese. Parametry

**Rigas Meži**

u stromů přirozeně ve svých současných tend-  
dů. Vývoj spotřeby výrobků ze dřeva a využití  
dřeva pro energetické účely bude stabilně růst  
a v závislosti na poptávce porostu i dodávky  
dříví, především pak vzroste poptávka po  
stěžích zbylých. Pro definici rozvoje mimo  
lesnický sektor byl použit scénář B2, tak jak  
ho definoval Intergovernmental Panel on  
Climate Change (IPCC).  
Scénáře hospodářské politiky evropských  
států oproti referenčnímu scénáři umožňují  
analyzovat důsledky vybraných preferencí dal-  
šího rozvoje evropské společnosti. Jejich hlav-  
ním smyslem není ukázat, co se stane



Working Party on Forest Statistics, Economics and Management



## Dissemination and Outreach

*Delegates are invited to take note of the above activities and:*

- a) inform the Working Party of any other initiatives taken or planned to promote discussion of the issues raised by EFSOS II*
- b) suggest further opportunities for reaching out to other sectors and working with actors in those areas*
- c) provide advice on funding and development of outreach and communication activities*



## The forest sector outlook study process

- *Delegates to the Working Party and members of the team are invited to make comments and suggestions on all aspects of the process, considering:*
  - a) whether the stated objectives are being met, and, if so, whether the methods chosen are effective and efficient;*
  - b) whether the concept of outlook studies in general represents a significant contribution to the promotion of sustainable forest management in the region.*

*However the secretariat proposes to focus on the following three aspects:*

  - c) Use of the sector outlook studies by policy makers: are they achieving their objectives?*
  - d) Are national correspondents contributing to, and benefiting from, the outlook study process?*
  - e) What are the lessons learned from EFSOS and NAFSOS as regards analysis, data and methods?*



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# Use of forest sector outlook studies by policy makers- Questions

- *Forest sectors outlook studies aim to provide policy makers with objective analysis on which they can make well-informed choices.*
- *However, there is little evidence that policy makers use these tools*
- *Working Party delegates and team members are invited to address the following questions:*
  - a) Do policy makers, inside and outside the forest sector, use studies of the long term outlook for the forest sector?*
  - b) If so, what type of study is used, and how?*
  - c) What improvements would be desirable in regional forest sector outlook studies, like EFSOS II, NAFSOS or RFFSOS to make them more useful to policy makers?*





# Role of national forest sector outlook correspondents

- National correspondents were nominated by countries as focal points to follow the progress of the study, review data, participate to meetings.
- However, there was a lack of active participation at discussions of methods and conclusions.
- Little feedback was received on the data base and on the scenarios.
- A number of reasons have been identified:
  - Complexity of data
  - Lack of experience of correspondents on methods and projections
  - Lack of time for national review
  - Insufficient resources and importance assigned to outlook studies
  - Lack of a network of national institutes and experts in the field of outlook



# Role of national forest sector outlook correspondents

*The Working Party and the team are invited to discuss the role of national correspondents in the outlook study process. Possible roles could include:*

- a) Validation of data sets;*
- b) Checking reference scenarios (national level) for “reasonableness” and comparing them with scenarios or policies used at the national level, including consideration of reasons for differences;*
- c) Collecting information at national level, not only on core data (which should be available through other channels, notably JFSQ and FRA), but also on policies, costs and prices etc.;*
- d) Conducting a dialogue with national policy makers, identifying consequences for the country of the regional scenarios and leading national discussion of the outlook.*



## Conclusions

*Delegates to the Working Party are invited to:*

*a) Take note of the activities in Work Area 3 during 2011/2012, and to thank all those who contributed to EFSOS II, NAFSOS and are contributing to RFFSOS:*

*b) Suggest methods of work that would provide the desired level of output;*

*c) Provide guidance for Work Area 3 in the light of their discussions.*



# Thank you!

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Thank you for your attention!



Working Party on Forest Statistics, Economics and Management

