



FEDERAL FORESTRY AGENCY

THE RUSSIAN FEDERATION FOREST SECTOR OUTLOOK STUDY TO 2030

**Deputy head of Federal Forestry Agency
Alexander Panfilov**

UNECE, Geneva,
October 17, 2012



- 1. Period of study : September 2011 – June 2012**
- 2. Supervising Committee (7 persons):**
federal authorities, business, international and
nongovernmental organizations.
- 3. Project executives – Russian experts**
(22 people from 10 organisations)



Outlook Study examines three scenarios:

- inertial
- moderate
- innovation

Basis for forecast estimates:

- National forest inventory data for the period from 1956 to 2010
- Pan-European Indicators for Sustainable Forest Management (Forest Europe, 2011)

FOREST AREA IN RUSSIA IN 2010 (THOUSAND HA)



Forest land categories	Total area with forests	Including forest uses			Forest land	Including covered by forest vegetation
		Protection	Exploitable	Reserve		
Forest estate land	1 143 563.7	275 002.8	610 723.6	257 837.3	862 575.3	770 315.6
Defence and security lands	4 745.9	1 281.9	3 462.9	1.1	3 952.3	3 656.7
Urban forest	1 350.4	1 350.4	0.0	0.0	1 110.6	1 007.3
Protected forest	26 944.0	26 944.0	0.0	0.0	17 850.3	16 878.4
Lands of other categories	7 078.2	3 152.7	3 767.5	158.0	6 466.4	5 638.3
Including forest estate parcels previously owned by agricultural organizations	4 603.8	2 016.3	2 587.5	0.0	-	-
Total forests	1 183 682.2	307 731.8	617 954.0	257 996.4	891 954.9	797 496.3



CHANGES IN AREAS OF MAIN FOREST-FORMING TREE SPECIES (THOUSAND HA)

Main forest-forming tree species	1988	1993	1998	2003	2005	2010
Coniferous						
Pine	113 564.0	114 326.0	116 740.0	117 473.0	117 295.0	120 227.1
Spruce	78 810.0	75 866.3	77 658.0	77 198.4	76 417.7	77 660.7
Larch	277 898.0	263 348.0	265 719.0	264 287.0	264 269.9	275 785.9
Siberian cedar	40 166.0	39 797.6	41 033.2	40 852.0	41 171.6	38 867.3
Hard-leaved deciduous						
Long-boled oak	3 761.0	3 808.0	3 719.0	3 633.7	3 611.9	3 670.8
Short-stemmed oak	3 198.7	2 971.3	3 110.3	3 200.0	3 161.0	3 206.1
Beech	698.5	701.3	786.0	789.6	793.1	685.2
Soft-leaved deciduous						
Birch	85 531.0	87 732.5	94 170.5	97 950.0	99 683.7	115 723.5
Aspen	17 711.4	18 907.9	20 035.0	20 573.4	20 802.0	23 739.5

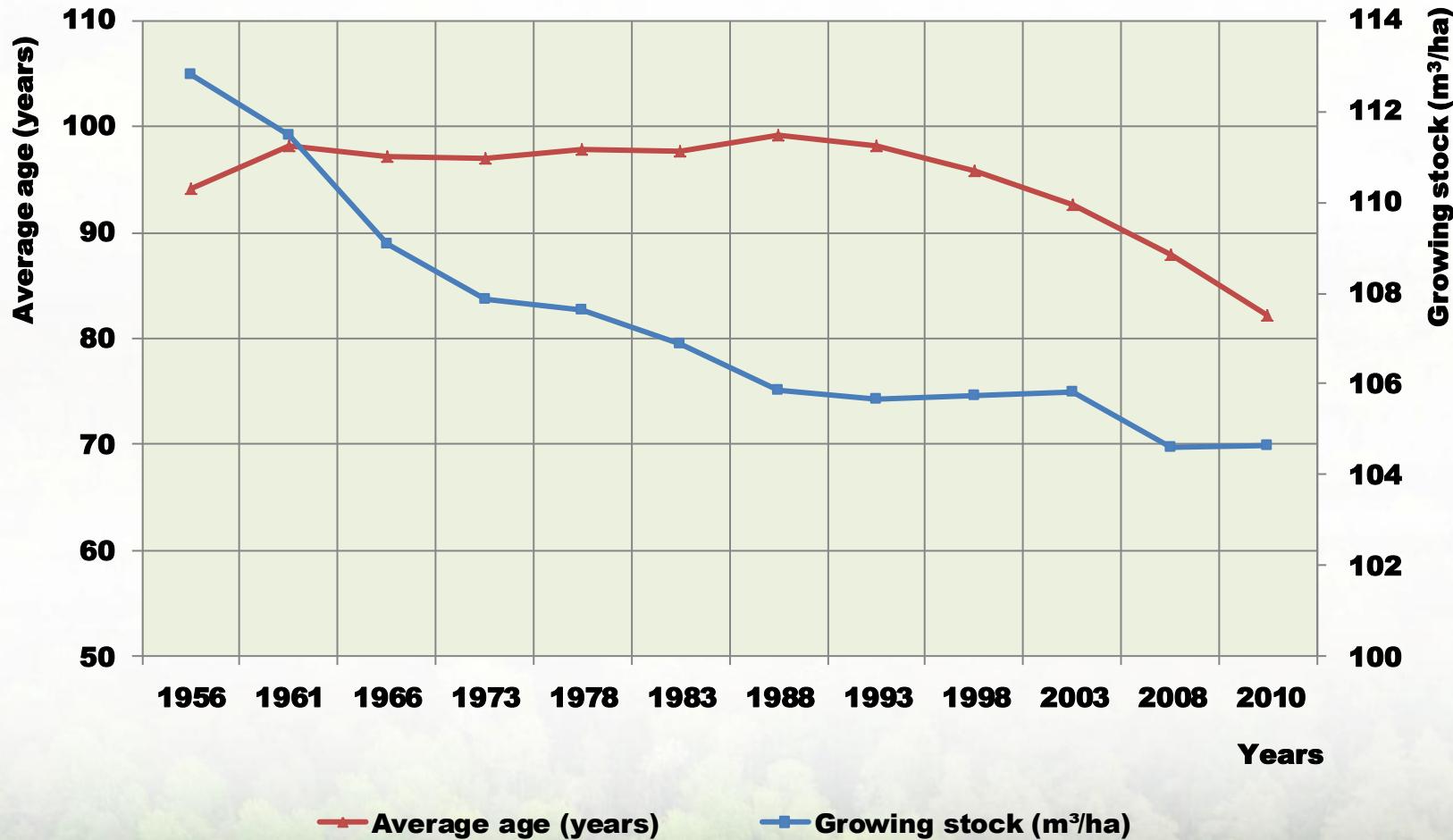


FOREST DYNAMICS

Year	Forest land (million ha)	Forest cover (million ha)	Growing stock (billion m ³)	Growing stock (m ³ /ha)*	Annual increment (million m ³)	Annual increment (m ³ /ha)	Age of wood stands (years)
1956	773.5	674.6	76.1	113.0	807.9	1.20	94
1961	848.1	695.4	77.5	111.0	789.2	1.13	98
1966	812.9	705.6	76.9	109.0	792.1	1.12	97
1973	862.0	729.6	78.6	108.0	821.1	1.13	96
1978	881.4	749.4	80.6	108.0	824.2	1.10	98
1983	880.5	766.6	81.9	107.0	838.6	1.09	98
1988	884.0	771.1	81.6	106.0	822.5	1.07	99
1993	886.5	763.5	80.6	106.0	822.1	1.08	98
1998	881.9	774.2	81.8	106.0	853.9	1.10	96
2003	882.9	776.1	82.1	106.0	886.7	1.14	93
2008	890.7	796.1	83.2	105.0	947.3	1.19	88
2010	891.9	797.4	83.4	105.0	1 016.1	1.27	82

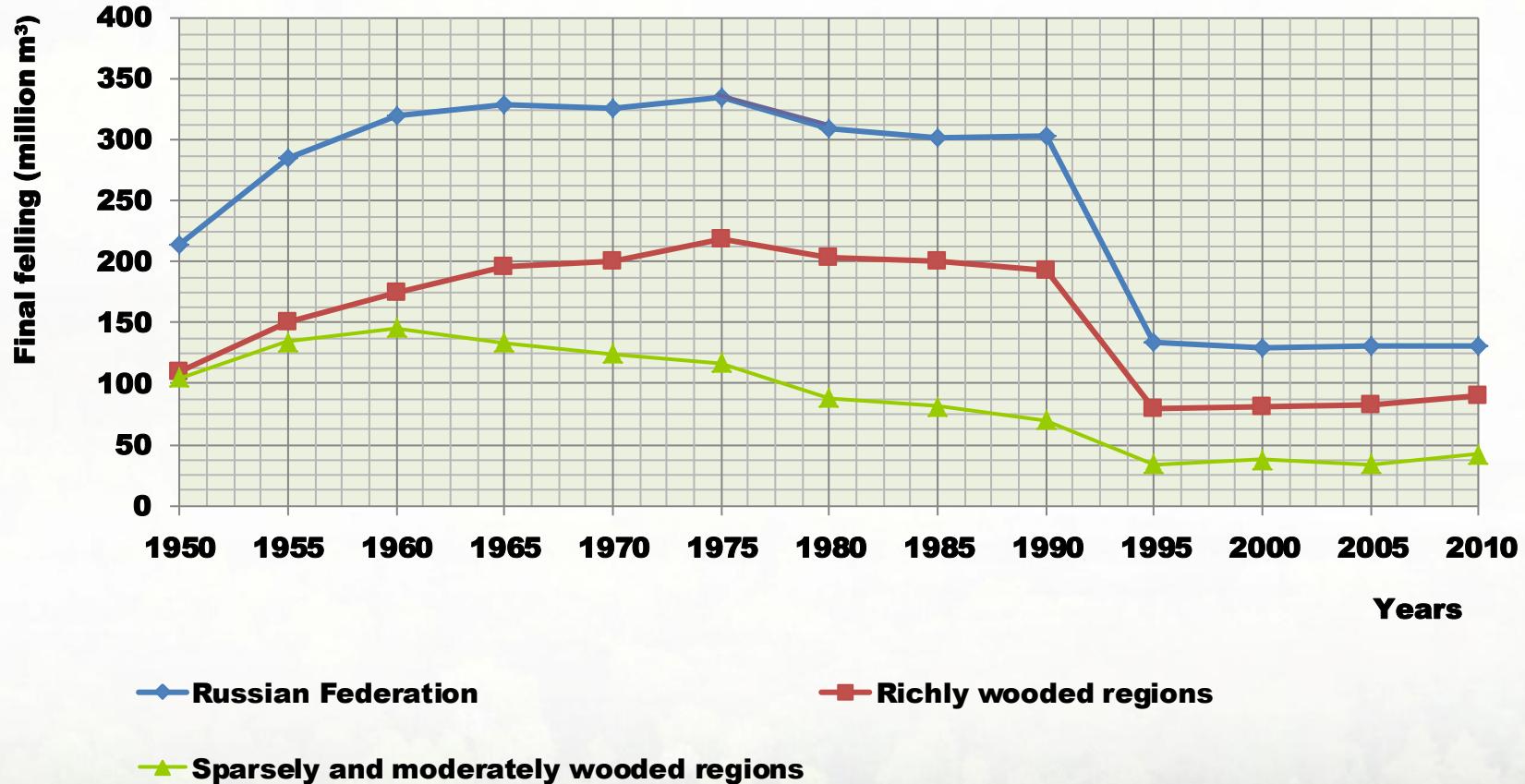


GROWING STOCK VOLUMES AND AGE





FINAL FELLING IN THE RUSSIAN FEDERATION, 1950-2010





FOREST AREA AND GROWING STOCK

Years	Forest area (thousand ha)		
	Forests	Other wooded land	Total forest area
Inertial			
2010*	817 544	73 300	890 844
2015	820 000	73 380	893 380
2020	822 000	73 460	895 460
2025	824 000	73 540	897 540
2030	825 000	73 620	898 620
Moderate			
2010*	817 544	73 300	890 844
2015	821 000	73 579	894 579
2020	823 500	73 849	897 349
2025	826 000	74 109	900 109
2030	827 500	74 175	901 675
Innovation			
2010*	817 544	73 300	890 844
2015	822 000	73 779	895 779
2020	825 000	74 237	899 237
2025	828 000	74 677	902 677
2030	830 000	74 730	904 730



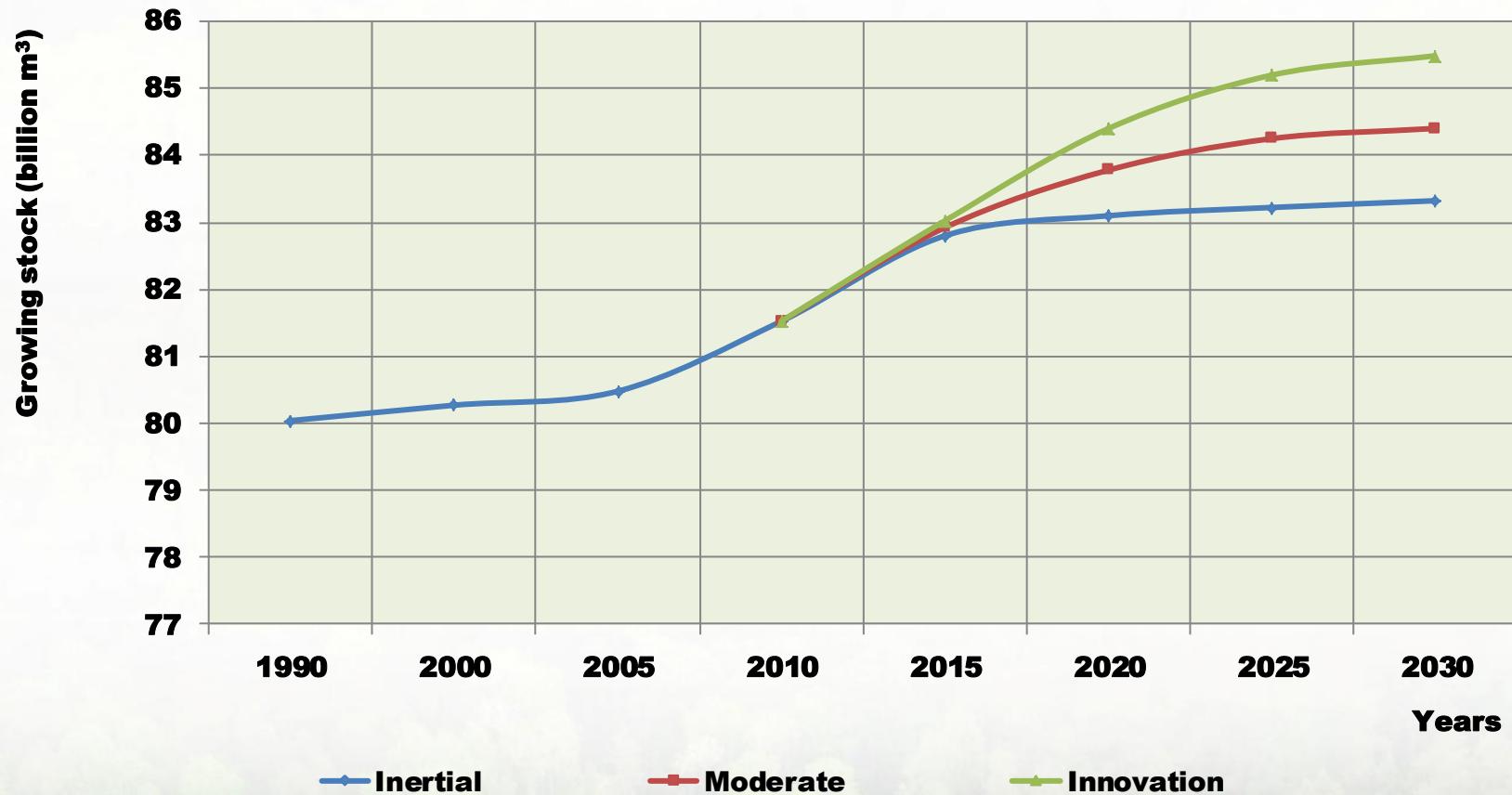
GROWING STOCK, INCREMENT AND AGE OF WOOD STANDS AND SHRUBBERY

Years	Growing stock (million m ³)			Annual increment (m ³ /yr)	Age of wood stands and shrubbery (years)
	Forests	Other wooded land	Total		
Inertial					
2015	82 800	1 840	84 640	1 045	81
2020	83 100	1 890	84 990	1 061	80
2025	83 224	1 940	85 164	1 078	79
2030	83 325	1 990	85 315	1 094	78
Moderate					
2015	82 921	1 845	84 766	1 046	81
2020	83 780	1 900	85 680	1 063	80
2025	84 252	1 955	86 207	1 091	79
2030	84 405	2 005	86 410	1 108	78
Innovation					
2015	83 022	1 850	84 872	1 048	81
2020	84 400	1 910	86 310	1 076	80
2025	85 200	1 970	87 170	1 104	79
2030	85 490	2 020	87 510	1 122	78



FORECAST OF GROWING STOCK (BILLION M³)

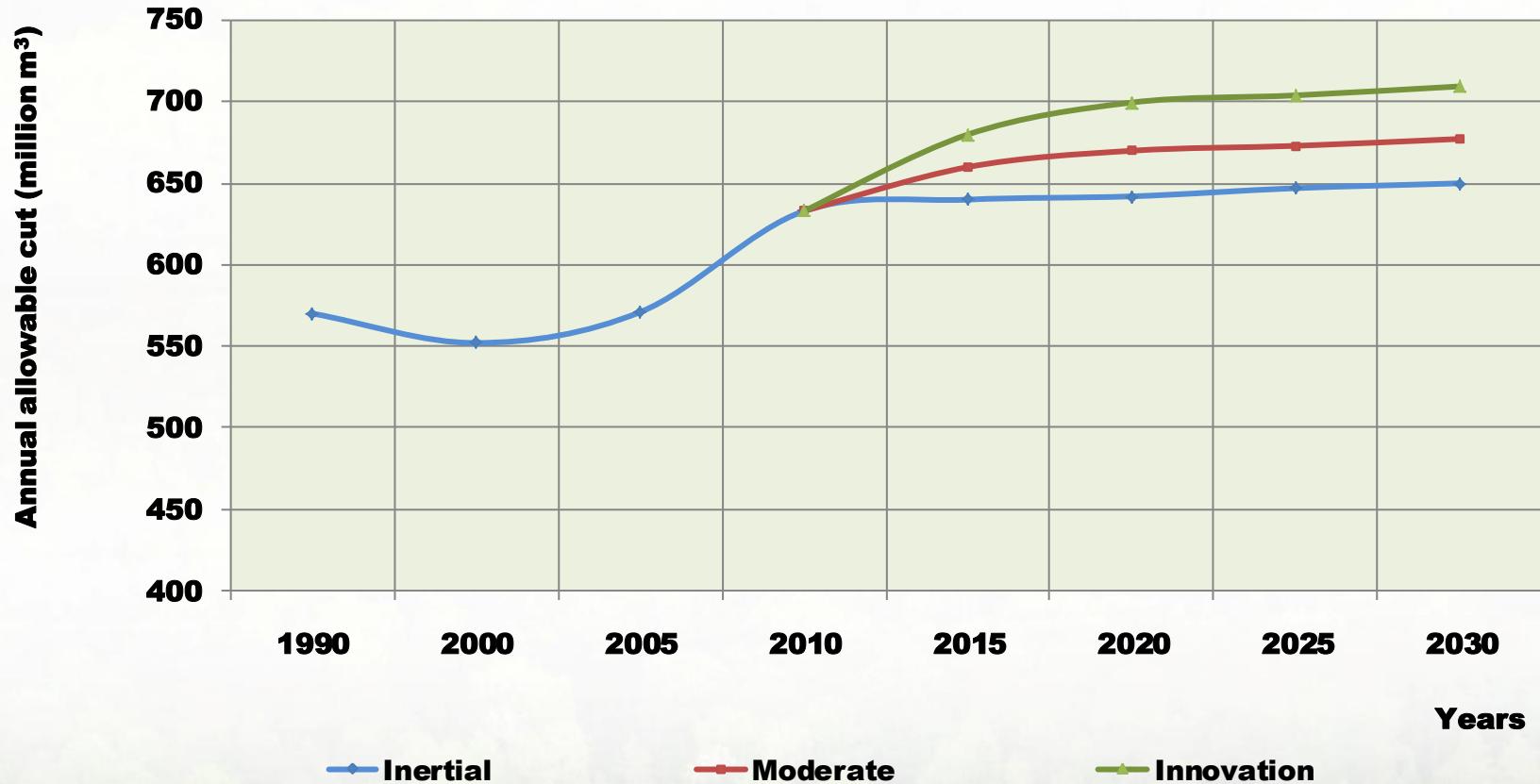
11





ANNUAL ALLOWABLE CUT (MILLION M³)

12





- **Federal level (examples):**
 - Ministerial process ENA FLEG
 - The plan of prevention illegal logging and wood turnover in the Russian Federation
 - Commission on the prevention illegal logging and wood turnover
 - Remote forest monitoring and audit
 - Development of new regulations. Example: project of the law regulating the round timber turnover
- **Regional level**
- **Assessing the efforts efficiency**



ADDRESSING ILLEGAL LOGGING: SCENARIOS METHODS OF REGULATION

- **Inertial**
 - No significant certification growth
 - Home initiatives inefficient
 - Forest initiatives inefficient
 - 2030: 5–10% decrease
- **Moderate and innovative**
 - significant certification growth as a response for the market demand (foreign and domestic)
 - Effective international law
 - Effective Russian initiative in the wood certification древесины
 - Decrease of illegal forest use by 30 - 80%

REGULATION METHODS

- To create a more efficient system of forest use control
- To toughen the punishment for the illegal feeling
- To develop the policy of state and municipal purchases, voluntary tools and voluntary forest certification
- Develop target provision of the information to people and businesses



Wood products in the Russian Federation, 1980-2010

Indicator	1980	1990	1995	2000	2005	2010	2010/ 1990 (%)	2010/ 2000 (%)
Roundwood (million m³)	328.0	303.8	116.2	167.9	185.0	173.6	57.1	102.7
Sawnwood (million m³)	80.0	75.0	26.5	20.2	22.0	19.0	25.3	94.1
Plywood (million m³)	1.5	1.6	0.9	1.5	2.6	2.7	168.7	180.0
Particle board (million m³)	3.5	5.6	2.2	2.3	3.9	5.5	98.2	239.0
Fibreboard (million m³)	1.5	1.5	0.8	0.9	1.3	1.7	113.3	188.9
Pulp (thousand tonnes)	2 405	2 770	1 801	2 037	2 429	2 100	75.8	103.1
Paper and paperboard (thousand tonnes)	6 998	8 325	4 070	5 140	7 126	7 750	93.1	150.8



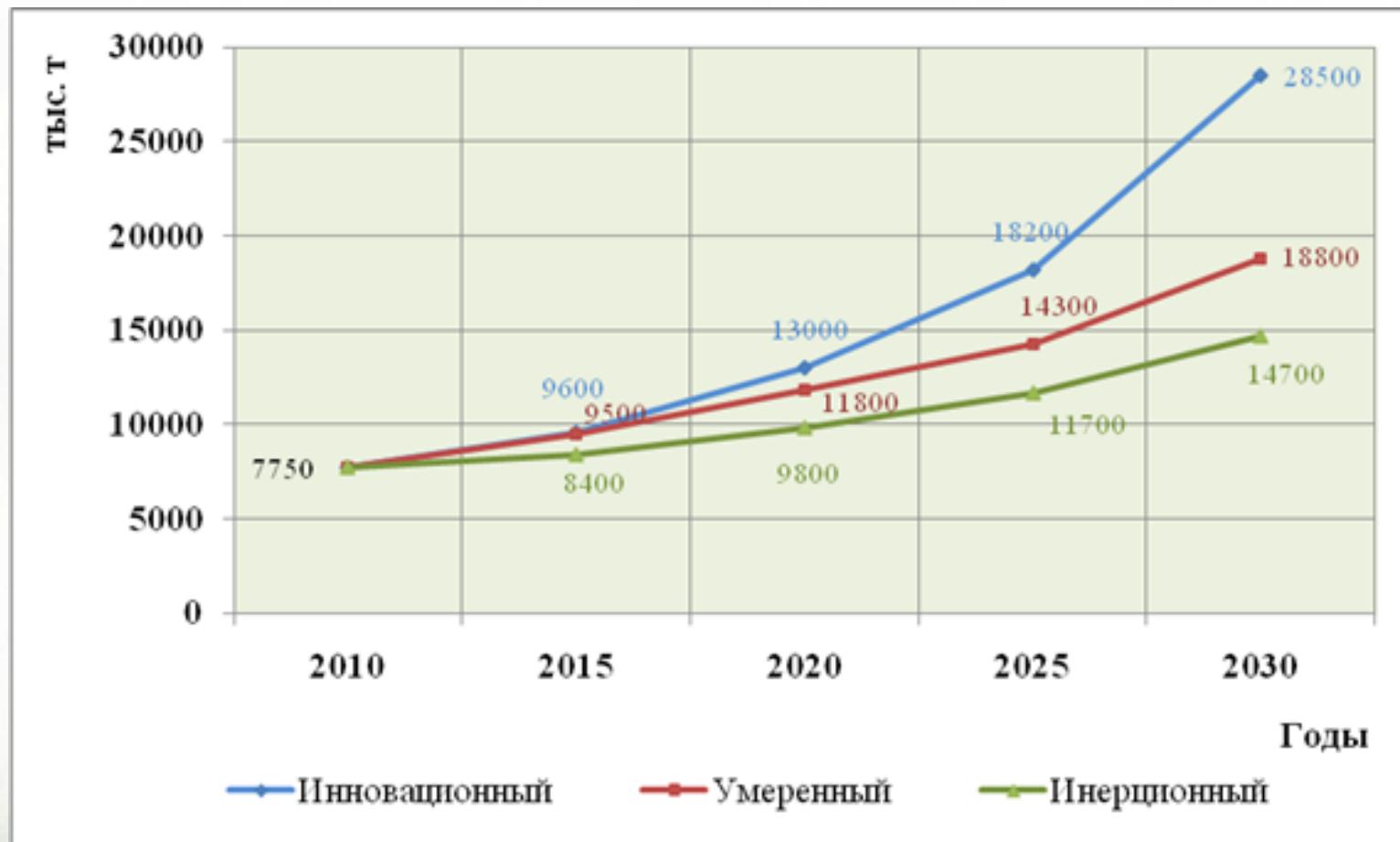
Export of basic forest products in the Russian Federation, 1990-2010

Forest products	1990	2000	2005	2007	2008	2009	2010
Roundwood (million m³)	15.0	30.8	48.3	49.3	36.7	21.7	21.2
Sawnwood (million m³)	7.1	7.8	14.8	17.3	15.3	16.2	17.7
Plywood (thousand m³)	394.0	974.0	1 527.0	1 503.0	1 326.0	1 334.0	1 512.0
Particle board (thousand m³)	115.0	135.0	242.0	479.0	411.0	496.0	490.0
Fibreboard (thousand m³)	43.0	299.0	380.0	455.0	402.0	411.0	277.0
Pulp (thousand m³)	389.0	1 660.0	1 946.0	1 900.0	2 035.0	1 702.0	1 650.0
Paper and paperboard (thousand m³)	906.0	2 293.0	2 737.0	2 590.0	2 635.0	2 595.0	2 538.0



Pulp and paper production to 2030

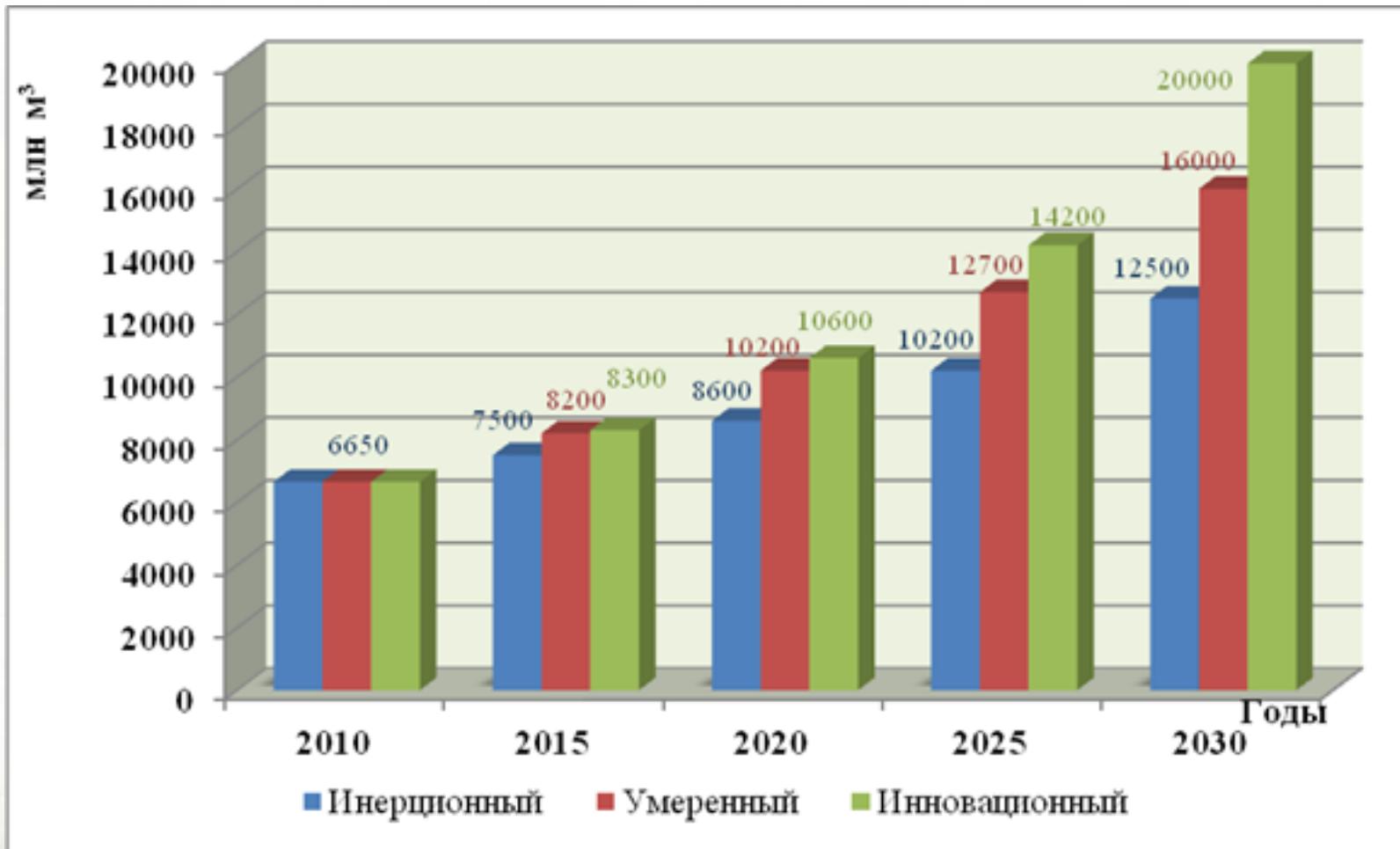
17





Pulp and paper consumption to 2030

18





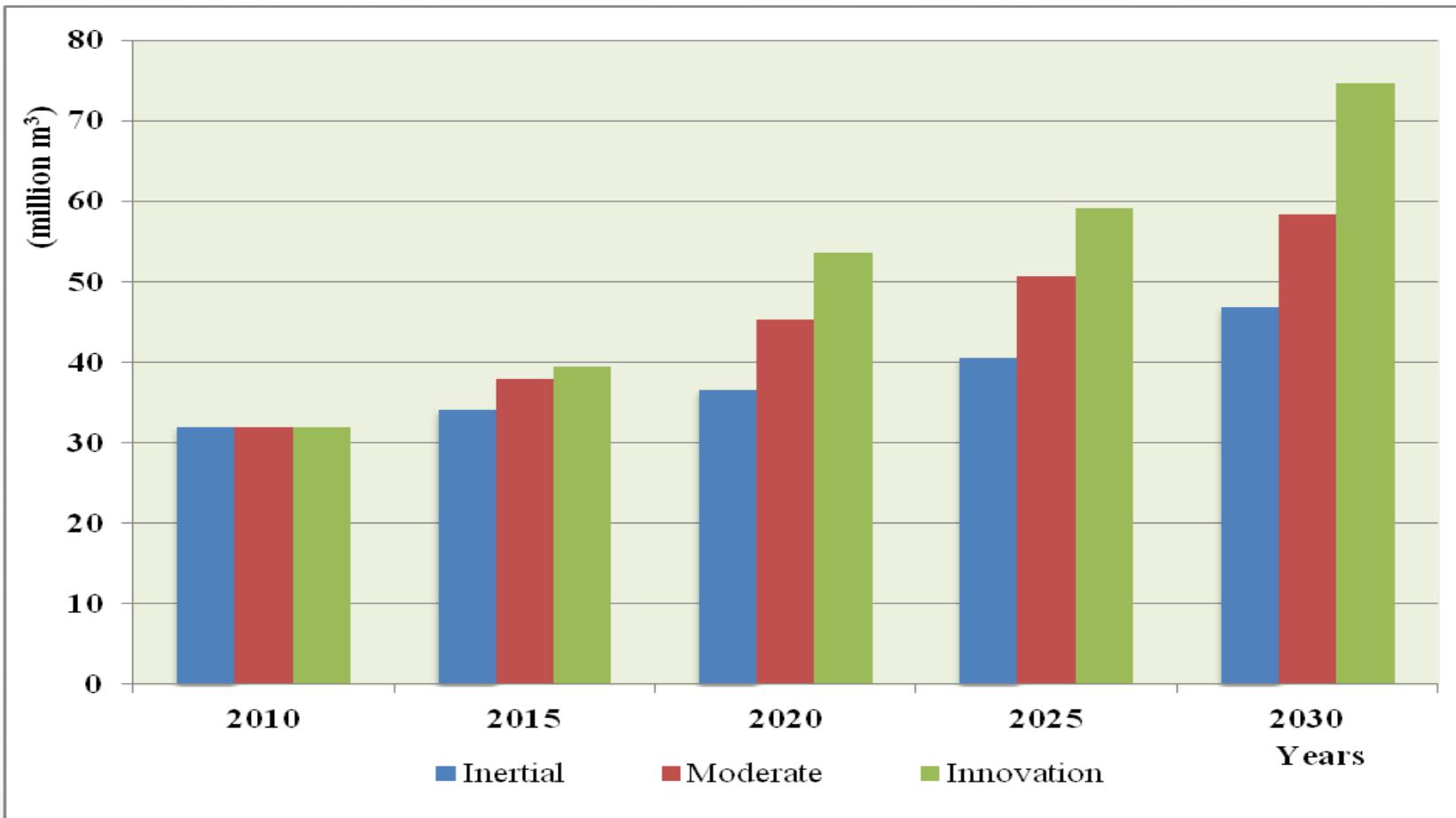
Wood fuel products (thousand tonnes)

Production	2010	2015	2020	2025	2030
Charcoal	44	50	72	95	120
Briquettes and pellets	800	1 600	4 000	8 000	8 500
Wood-based liquid fuel	0	44	200	305	405



Wood fuel products consumption to 2030

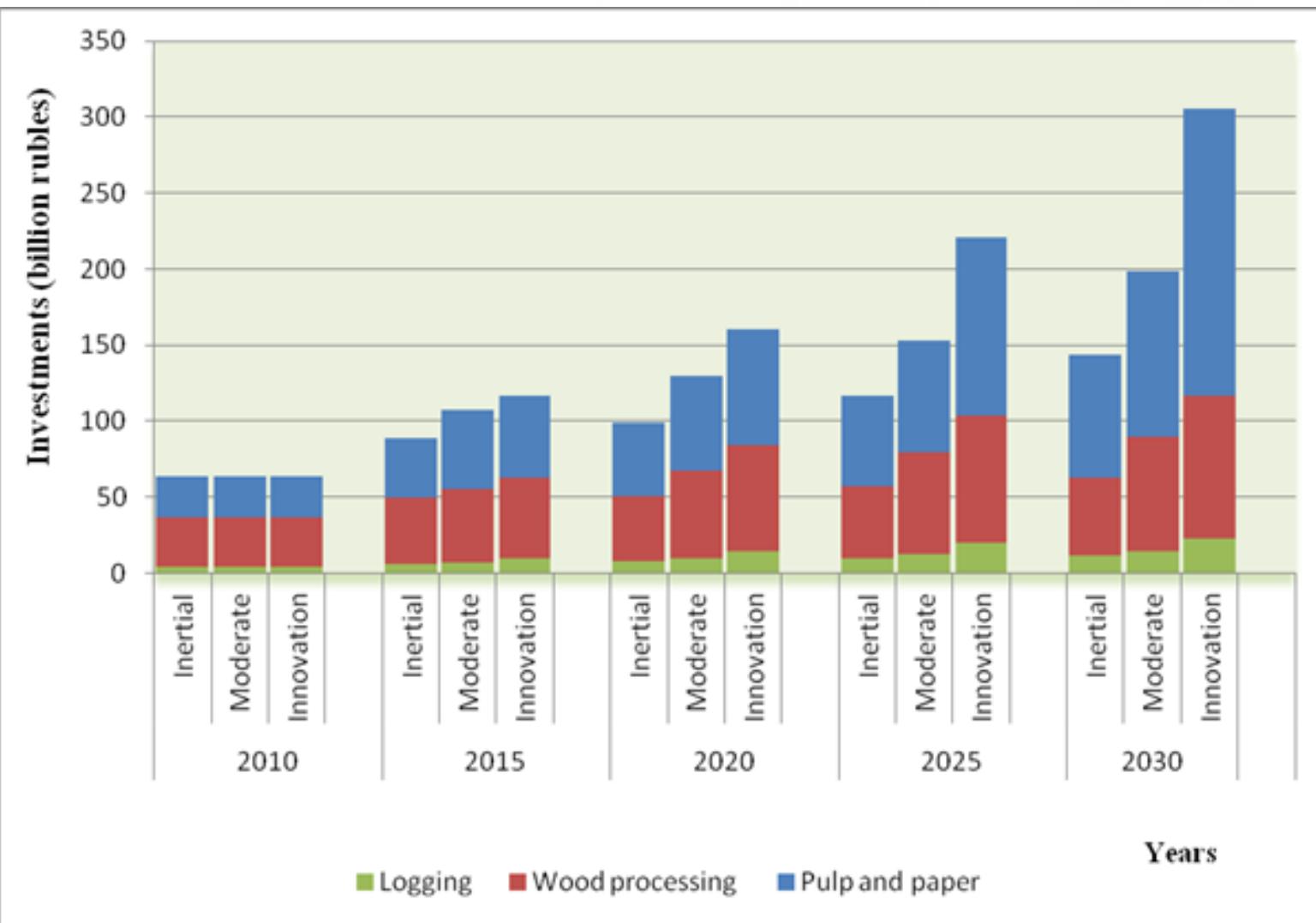
20





Investments in the forest industries (billion rubles)

21





GENERAL CONCLUSIONS

- 1. Under all scenarios, forest sector will develop to balance economic, ecological and social goals.**
- 2. The forest of the Russian Federation will maintain its environmental, ecological and social significance.**
- 3. The forest will provide to local population employment and income using social values and nonwood products. Forest management on sustainable base will favour the conservation of original culture of local population and small nations living in the North and in the Far East where the forest is the main environment of their life.**





The full text of the outlook study is available on the websites:

The Federal Forestry Agency
www.rosleshoz.gov.ru

The Food and Agriculture Organization of the United Nation (FAO)
www.fao.org/forestry

THANK YOU FOR ATTENTION!