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UNECE/FAO National Forest Policy Dialogue Mechanism

The future of the forestry and wood-based industries sector in the transition to a sustainable bioeconomy

21-23 September 2023, Kastamonu, Türkiye

The General Directorate of Forestry (OGM) under the Ministry of Agriculture and Forestry, with the support of the Turkish members of the FAO Advisory Committee on Sustainable Forest-based Industries (ACSFI), the Joint UNECE/FAO Forestry and Timber Section and FAO SEC/Türkiye Office will organize the National Forest Policy Dialogue on ***“the future of the forestry and wood-based industries sector in Türkiye in the transition to a sustainable bioeconomy”*** on 21-23 September 2023 in Kastamonu, Türkiye.

Background

a) National context

Türkiye has approximately 23 million hectares of forests, which corresponds almost 30 % of the country territory. Almost all forest is state owned and managed by the General Directorate of Forestry (GDF) under the Ministry of Agriculture and Forestry (MoAF). All forests are managed according to the forest management plans and in line with sustainable forest management (SFM) C&I principles. Forests resources provides several goods and services to the society including wood material to the forest- based industries in the country.

Wood-based industries sector in Türkiye, with its performance in recent years, is among the fast-growing sectors. Sub sectors like wood-based panels, furniture and packaging are the key drivers of this development. The sector is on the one hand importing wood material to fill the gap of wood material deficit in the domestic market and on the other hand, exporting semi-finished or finished products to several countries. However, the sector is faced challenges such as instability in wood supply, fluctuations of wood prices, lack of certification, inconsistency with EU and UNFCCC regulations including Paris Climate Agreement, relatively low investment in R&D, lack of quality insurance systems etc. On the other hand, the product demands of the wood-based industry are mainly met from semi-natural forests, not from industrial plantations. As it is known, in December 2022, the European Parliament and the European Council agreed on "deforestation-free supply chains"¹.

This regulation will certainly affect the wood harvesting made from semi-natural forests on the one hand and will change the export and import conditions on the other hand and will also force the sector's demand to be met from industrial plantations.

The workshop to be held in September 2023 coincides with an extremely important period for Turkey. The current Development Plan, which forms the basis of the country's development initiatives and constitutes the Turkish leg of the UN Sustainable Development Goals, will be completed by the end of 2023, and the preparations for the Twelfth Development Plan², which will cover the years 2024-2028, are currently underway.

It is expected that the issues to be discussed in this workshop will contribute to the Twelfth Development Plan objectives.

¹ https://ec.europa.eu/commission/presscorner/detail/en/ip_22_7444

² <https://onikinciplan.sbb.gov.tr/>



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The existing National Development Plan³ (2004-2023) of Türkiye advises that sustainable management of the country's forests should be considered together with the global/regional changes and developments and provision of wood and non-wood forests products from the forests should be consistent with SFM criteria and indicators.

b) Global and Regional context

The COVID-19 pandemic resulted in a large contraction in economic activity at global level and across the UNECE region after 2020, albeit with differences between countries due to the diversity of economic structures and policy responses.

The FAO, in collaboration with the International Tropical Timber Organization (ITTO) and Unique Consultancy, elaborated a Global Forest Sector Outlook 2050 to assess the capacity of wood supply to support a sustainable bioeconomy. The study assesses the market outlook for demand for primary processed wood products, demand and supply of industrial roundwood, wood energy, and forest employment and investments. From a demand-driven perspective, it discusses the actual forest resource base and production needs to supply future demand by factoring in the use of wood residues and enhanced productivity in the forest sector, as well as the influence of megatrends and policy objectives.

The Joint UNECE/FAO Forestry and Timber Section analyses structural developments in the forest sector in the region and produces studies on the long-term outlook for supply and demand for wood as well as other forest goods and services.

"The Forest Sector Outlook Study 2020-2040"⁴ provides information for the UNECE region that supports decision-making by showing the possible medium- and long-term consequences of specific policy choices and structural changes, using scenario analyses whenever possible. The study is the first to cover the entire region and provides results for the main UNECE subregions of Europe, North America and the Russian Federation.

The Study provides insight on six priority questions which were identified through a transparent and participatory process: (i) How would different demand changes affect the UNECE forest products market? (ii) How would different supply changes affect the UNECE region forest products markets? (iii) How would significant trade restrictions affect the UNECE region forest product markets? (iv) How will UNECE forests be affected by climate change? (v) How could UNECE region forests and the forest sector contribute to climate change mitigation? (vi) How could UNECE forests adapt to climate change?

The Study contains information on the possible impacts of future trends regarding the future forest carbon sink in tonnes of CO₂ equivalents, and on harvest, production, consumption, net exports, and prices of wood products by 2040. The Study takes a pragmatic, transparent and objective approach to answering these key questions, sometimes using a modelling approach. It enables stakeholders to evaluate the long-term consequences of policy choices.

The Study contributes to evidence-based policy formulation and decision making. It is not a forecast of what will happen in the future. Rather, it sheds light on the possible consequences of policy choices and of factors external to the forest sector, most notably anthropogenic climate change.

³ https://www.sbb.gov.tr/wp-content/uploads/2022/07/Eleventh_Development_Plan_2019-2023.pdf

⁴ <https://unece.org/forests/publications/forest-sector-outlook-study-2020-2040>

c) Circularity concepts in wood-based industries

Covid-19 held a magnifying glass to the globe's economic, social, and environmental fabric and revealed its fragility, caused at least in part by harmful economic practices impacting human health, biodiversity loss and driving climate change. These damaging patterns of economic activity, such as the unsustainable use of natural resources, were sobering indicators of human society's unsatisfactory progress towards achieving global sustainability. For the economic and social recovery from the COVID-19 crisis to be durable and resilient, returning to 'business as usual' is not a viable option.

To avoid this, planning for the world's economic recovery needs to be done using a sustainable model promoting the transition to a sustainable bioeconomy. The recovery policies being realized should aim to trigger investment and behavioural changes that will reduce the likelihood and severity of future health, economic and environmental shocks while increasing society's resilience to them when they do occur ensuring sustainable consumption and production patterns.

Central to this approach is a focus on human well-being and reconnection with the broad interplay of natural processes around the globe. And forest-derived biomass has for centuries been an important raw material for the global economy. Being both widely available and renewable serves to heighten its importance in the transition to a bioeconomy, however, both of these positives will remain only if forests are sustainably managed. Woodworking and pulp and paper industries have made progress in this regard by being genuinely committed to sustainable forest management, and not only because their industry depends on this natural resource.

Today, forest sector activities rely on large volume flows of wood as a commodity, with the sector's innovation efforts focusing on raw material productivity and optimization of production processes. From both the economic and environmental points of view, these strategies have been successful and align well with the principles of a circular bioeconomy.

Nevertheless, today the forest sector stands on the cusp of a new opportunity – one that would allow an enhanced role for wood manufacturing, including promotion of efficiency gains and creating new sustainable materials in many industrial processes. Being a strategic provider of a key resource to many forest-based industries, the forest sector can play a central role in the successful implementation of policies focusing on a sustainable bioeconomy. Therefore, it is important to better understand what circularity means for forest-based industries, what its limitations are and what is needed to make circularity sustainable and economically viable in these industries in the long term.

These topics will be discussed in the national context of Türkiye including regional inputs and vision based on the recent UNECE/FAO studies:

- [Circularity concepts in forest-based industries](#)
- [Circularity Concepts in Wood Construction](#)



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Workshop objectives:

The purpose of this NFPD workshop is to bring together experts from state partners (Ministry of Agriculture and Forestry and General Directorate of Forestry), forest-based organisations, private sectors, NGOs, Academia, UNECE, FAO, ACSFI members and from the country-based international organisations (e.g. UNDP, the WB) to:

- inform national partners about the main outcomes of the Global Forest Sector Outlook 2025 and the regional Forest Sector Outlook Study, 2020-2040 including a long-term outlook for supply and demand for wood, alternatives to address the wood gap as well as other forest goods and services in the region.
- inform the participants about the possible effects of Green Deal, EU Regulation on deforestation-free supply chains, emission trading systems and carbon credits.
- discuss with national partners about the possible opportunities and limitations of the application of the circular bioeconomy in forestry and wood-based industries sector in the region and in the country.
- discuss issues related to the promotion of industrial plantations to meet industry needs, taking into account the possibility of reduced harvesting from semi-natural forests and imports from other countries. Evaluation of the potential of fast-growing species including poplar, alder, willow, and especially acacia that can grow in arid regions.
- share updates from the state and non-state national actors regarding the existing situation and future projections for the forestry and wood-based industries sectors.
- propose recommendations and options for the future of the forestry and forest-based industries in Türkiye.



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Agenda of the Workshop

Dates and time	Agenda items
DAY 1, 21 September 2023	
<i>Moderator- ÖMER KÜÇÜK</i>	
10.00-10.40	Opening remarks <ul style="list-style-type: none">- Kastamonu Governor- Kastamonu University Rector- Ministry of Agriculture and Forestry (General Director of Forestry)- UNECE- FAO SEC- Minister of Agriculture and Forestry
10.40-11.00	Coffee break
11.00 – 12.30	<ul style="list-style-type: none">- Introduction of the workshop objectives, (Ekrem YAZICI, UNECE/FAO)- Presentation by the Ministry- Presentations by the private sector
12.30-13.30	Lunch break
13.30 -15:00	<ul style="list-style-type: none">- "Documentation and Future of Forest Management and Ecosystem Services in Türkiye " Prof Dr Derya EŞEN- “The Roadmap to Achieving Climate Neutrality in Türkiye: A Comprehensive Analysis of Long-Term Forestry Strategies.” Prof Dr Yusuf SERENGİL- EU Deforestation process, Regulation on Deforestation-free products (UNECE/FAO)- How can sustainability be applied to the forest products industry? Is the circular economy panacea for sustainable production? Dr Bahadır Çağrı BAYRAM- “Evaluation of Sustainability and Environmental Impact in the Perspective of the Wood Panel Industry in Türkiye” Prof. Dr Hülya KALAYCIOĞLU
15.00 – 15.15	Coffee break
15.15 – 17.30	<ul style="list-style-type: none">- FAO presentation on forest-based bioeconomy and the Global Forest Sector Outlook 2050, Sven Walter, FAO- Presentation UNECE/FAO Regional Forest Outlook Studies, Florian Steierer, UNECE/FAO- Presentation on FAO's ACSFI and CPF Initiative "Sustainable Wood for a Sustainable World (SW4SW), Sven Walter, FAO
17:30	Closure of Day 1



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Dates and time	Agenda items
DAY 2, 22 September 2023	
<i>Moderator YUSUF SERENGİL</i> DAY 2, 22 September 2023	
09.30 – 11.00	<ul style="list-style-type: none">• Presentation on circularity concepts in forest-based industries, Alicja Kacprzak, UNECE/FAO• Presentation on circularity and the use of man-made cellulose fibres relevant to the Turkish textile industry –Alicja Kacprzak, UNECE/FAO• Wood construction, Florian Steierer, UNECE/FAO• Discussions
10.00– 11.15	Coffee break
11:00 – 12.30	Group works
12.30 – 13.30	Lunch break
13.30 – 14.30	Group Work continued
14.30 – 15.00	Presentation of group works and Q&A
15.00 - 15.15	Coffee break
15.15 -16.30	Conclusion of the workshop results and possible action points for the future
16.30.17.00	Closure of the meeting

DAY 3, 23 September 2023

10:00-12:30 Field visit to the private forest processing company
