# POWER POINT PRESENTATIONS

## Agenda item 4

## FORESTS AND CLIMATE CHANGE: THE ROAD TO COPENHAGEN

50th ACPWP
Rome
26 May 2009

Susan Braatz
Forests and Climate Change Officer



## Issues relevant to industrial forest sector

- Impact of CC on forests
- Access to forest lands
- Competition for land
- Energy prices
- Availability of raw materials
- Incentives to use low-emissions technologies
- Carbon markets
- Markets for bioenergy
- Product competitiveness

Adapted from WRI , 2008 "Trees in the Greenhouse"



## Status of UNFCCC negotiations

- Lead up to Copenhagen (7-18 December)

Bonn, 1-12 June SBSTA, AWGs → Bonn, 10-14 August AWGs → Bangkok, 28 Sept.-8 Oct. AWGs → TBA, 2-6 November AWGs

- Negotiations in two working groups: LCA and KP
- Key issues in AWG-LCA
  - "Vision"; adaptation, mitigation, technology, financing
- Key issues in AWG-KP
  - further mitigation commitments by A1 countries, incl. emissions trading and project based mechanisms and LULUCF



## Issues relevant to industrial forest sector

### MITIGATION

AWG-LCA:
- NAMAs
- REDD

AWG-KP:
- land-based or activities-based accounting
- accounting methods for forest management
- treatment of harvested wood products
- CDM project eligibility



## Issues relevant to industrial forest sector

### ADAPTATION

- emphasis is on most vulnerable countries, populations and/or ecosystems
- possible decision that all countries will have to formulate and report on national adaptation plans
- financial support and transfer of adaptation technologies to developing countries, including forestry adaptation



## Engagement of forest industry in UNFCCC process

- Work through your negotiators
- Deliver statements and issue policy messages
- Hold side events at UNFCCC sessions

50th Session of the FAO Advisory Committee on Paper and Wood Products
Rome. 26 May 2009

# The Impacts of the financial crisis on pulp and paper industry: Italy

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## Outline

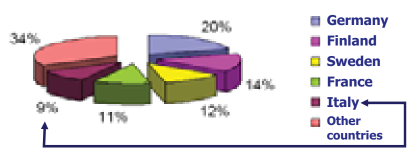
1. Introduction
2. Italian pulp & paper sector: at the end of the recession?
3. Adaptation strategy in a period of turmoil:
   - Energy costs reduction
   - PR activities: → public support
   - Further greening of the industry
   - Increasing the domestic supply of raw material
4. Conclusions

## 1. Introduction (pre-crisis condition)

Italy in Europe: 4th paper largest producer (after G, FIN, S), 5th considering also pulpwood

- 1st in tissue paper production
- 4th in packaging paper
- 5th in printing paper (with some specialization in high value products)

**European production of pulp and paper**




## Industrial structure
(Source: Assocarta)

| year | Companies no | Plants no | Employees no | Employees var% |
|---|---|---|---|---|
| 1998 | 171 | 207 | 25300 | -1.2 |
| 1999 | 166 | 202 | 25100 | -0.8 |
| 2000 | 164 | 201 | 25000 | -0.4 |
| 2001 | 162 | 200 | 24800 | -0.8 |
| 2002 | 156 | 200 | 24500 | -1.2 |
| 2003 | 152 | 196 | 24000 | -2.0 |
| 2004 | 151 | 194 | 23700 | -1.3 |
| 2005 | 147 | 191 | 23400 | -1.3 |
| 2006 | 145 | 189 | 23000 | -1.7 |
| 2007 | [illegible] | [illegible] | [illegible] | -1.3 |

| year | 1000 50 00 ton | 5 001 10 000 ton | 10 001 25 000 ton | 25 001 50 000 ton | 5 0001 100.000 ton | > 100 000 ton | TOTAL |
|---|---|---|---|---|---|---|---|
| 1998 | 32 | 43 | 51 | 34 | 25 | 22 | 207 |
| 1999 | 31 | 37 | 50 | 33 | 29 | 22 | 202 |
| 2000 | 30 | [illegible] | [illegible] | [illegible] | [illegible] | 23 | 201 |
| 2001 | 30 | [illegible] | [illegible] | [illegible] | [illegible] | 23 | 200 |
| 2002 | 32 | 37 | 48 | 34 | 25 | 24 | 200 |
| 2003 | 32 | 36 | 49 | 31 | 23 | 25 | 196 |
| 2004 | 33 | 37 | 50 | 27 | 22 | 25 | 194 |
| 2005 | 34 | 31 | 40 | 35 | 26 | 25 | 191 |
| 2006 | 34 | 29 | 42 | 34 | 24 | 26 | 189 |
| 2007 | 34 | 28 | 44 | 32 | 22 | [illegible] | 186 |

Closing down of smaller, inefficient plants

## Trade (quantity and value – M€) and consumption (Source: Assocarta)

| year | Production 1000 T | Production Var% | Import 1000 ton | Import Var% | Export 1000 ton | Export Var% | Consumption 1000 ton | Consumption Var% | Exp / Production % | Imp / Consumption % |
|---|---|---|---|---|---|---|---|---|---|---|
| 1998 | 8390.4 | 2.7 | 3934.9 | 2.0 | 2250.7 | -0.1 | 10074.7 | 3.1 | 26.8 | 39.1 |
| 1999 | 8685.6 | 3.5 | 4173.5 | 6.1 | 2436.9 | 8.3 | 10422.2 | 3.4 | 28.1 | 40.0 |
| 2000 | 9131.4 | 5.1 | 4543.8 | 8.9 | 2599.2 | 6.7 | 11076.0 | 6.3 | 28.5 | 41.0 |
| 2001 | 8956.4 | -1.9 | 4464.4 | -1.7 | 2618.0 | 0.7 | 10802.8 | -2.5 | 29.2 | 41.3 |
| 2002 | 9356.2 | 4.5 | 4663.7 | 4.5 | 2841.6 | 8.5 | 11178.4 | 3.5 | 30.4 | 41.7 |
| 2003 | 9491.0 | 1.4 | 4677.3 | 0.3 | 2916.2 | 2.6 | 11252.1 | 0.7 | 30.7 | 41.6 |
| 2004 | 9667.1 | 1.9 | 5046.9 | 7.9 | 3248.5 | 11.4 | 11465.5 | 1.9 | 33.6 | 44.0 |
| 2005 | 9999.4 | 3.4 | 5192.3 | 2.9 | 3459.1 | 6.5 | 11732.5 | 2.3 | 34.6 | 43.2 |
| 2006 | 10008.4 | 0.1 | 5262.3 | 1.3 | 3502.2 | 1.2 | 11768.4 | 0.3 | 35.0 | 44.7 |
| 2007 | [illegible] | 1.0 | 5296.5 | 0.7 | 3514.1 | 0.3 | [illegible] | 1.1 | 34.8 | 44.5 |

| year | Production value | Production value Var% | Export | Export Var% | Import | Import Var% | balance |
|---|---|---|---|---|---|---|---|
| 1998 | 6216 | 5.0 | 2164 | 5.3 | 2620 | 7.7 | -456 |
| 1999 | 6324 | 1.7 | 2167 | 0.1 | 2680 | 2.3 | -513 |
| 2000 | 7600 | [illegible] | [illegible] | [illegible] | 3419 | 27.6 | -732 |
| 2001 | [illegible] | [illegible] | [illegible] | [illegible] | 3382 | -1.1 | -618 |
| 2002 | 7175 | -1.2 | 2774 | 0.3 | 3296 | -2.5 | -522 |
| 2003 | 6905 | -3.8 | 2727 | -1.7 | 3164 | -4.0 | -437 |
| 2004 | 6915 | 0.1 | 2844 | 4.3 | 3248 | 2.7 | -404 |
| 2005 | 7065 | 2.2 | 2990 | 5.1 | 3314 | 2.0 | -324 |
| 2006 | 7660 | 2.6 | 30 | 3.6 | 3459 | 4.4 | -365 |
| 2007 | [illegible] | 5.7 | 3207 | 3.6 | 3572 | 3.3 | [illegible] |

Rising production and added value

## Raw materials (Source: Assocarta)

Waste paper

The Europan industry uses 42% of recycled fibres

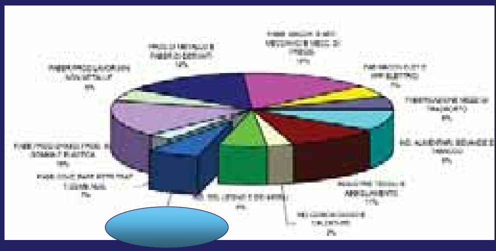
| year | Internal supply 1000 T | Internal supply Var% | Import 1000 T | Import Var% | Export 1000 T | Export Var% | Consumption 1000 T | Consumption Var% | Rate of use of waste paper % | Recycling rate % |
|---|---|---|---|---|---|---|---|---|---|---|
| 1998 | 3749.3 | 6.9 | 853.6 | -7.8 | 41.8 | -20.8 | 4561.1 | 4.1 | 54.4 | 45.3 |
| 1999 | 4084.1 | 8.9 | 706.2 | -17.3 | 127.7 | 205.8 | 4662.6 | 2.2 | 53.7 | 44.7 |
| 2000 | 4565.5 | 11.8 | 741.4 | 5.0 | 217.9 | 70.6 | 5089.1 | 9.1 | 55.7 | 45.9 |
| 2001 | 4730.1 | 3.6 | 674.1 | -9.1 | 257.7 | 18.3 | 5146.5 | 1.1 | 57.5 | 47.6 |
| 2002 | 5010.7 | 5.9 | 680.8 | 1.0 | 418.7 | 62.5 | 5272.9 | 2.5 | 56.4 | 47.2 |
| 2003 | 5227.0 | 4.3 | 589.1 | -13.5 | 528.4 | 26.2 | 5287.7 | 0.3 | 55.7 | 47.0 |
| 2004 | 5592.5 | 7.0 | 500.5 | -15.0 | 618.7 | 17.1 | 5474.2 | 3.5 | 56.6 | 47.7 |
| 2005 | 5791.8 | 3.6 | 445.4 | -11.0 | 749.0 | 21.1 | 5488.2 | 0.3 | 54.9 | 47.6 |
| 2006 | 6000.5 | 3.7 | 466.8 | 4.4 | 894.5 | 19.0 | 5577.6 | 1.6 | 55.7 | 47.4 |
| 2007 | 6166.5 | 2.7 | 493.1 | 5.6 | 1079.1 | 20.6 | 5580.5 | 0.1 | [illegible] | 46.9 |

Pulpwood

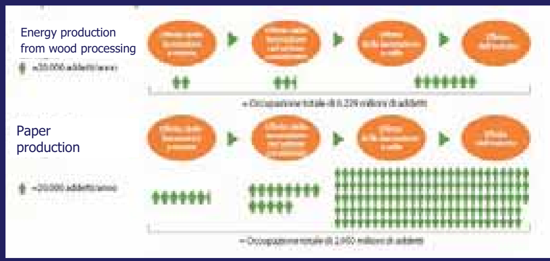
| year | Production 1000T | Production Var% | Import 1000T | Import Var% | Export 1000T | Export Var% | Consumption 1000T | Consumption Var% | Exp/Production % | Imp/Consumption % |
|---|---|---|---|---|---|---|---|---|---|---|
| 1998 | 455.7 | -1.8 | 3075.7 | 1.5 | 12.9 | 7.9 | 3518.6 | 1.0 | 2.8 | 87.4 |
| 1999 | 440.4 | -3.4 | 3118.2 | 1.4 | 15.4 | 20.0 | 3543.2 | 0.7 | 3.5 | 88.0 |
| 2000 | 433.5 | -1.6 | 2975.6 | -4.6 | 19.2 | 24.5 | 3389.9 | -4.3 | 4.4 | 87.8 |
| 2001 | 414.5 | -4.4 | 3095.4 | 4.0 | 21.1 | 9.7 | 3488.8 | 2.9 | 5.1 | 88.7 |
| 2002 | 450.2 | 8.6 | 3241.2 | 4.7 | 17.0 | -19.4 | 3674.3 | 5.3 | 3.8 | 88.2 |
| 2003 | 477.9 | 6.2 | 3392.2 | 4.7 | 23.8 | 39.8 | 3846.4 | 4.7 | 5.0 | 88.2 |
| 2004 | 491.4 | 2.8 | 3285.9 | -3.1 | 18.0 | -24.3 | 3759.2 | -2.3 | 3.7 | 87.4 |
| 2005 | 515.6 | 4.9 | 3510.9 | 6.8 | 30.3 | 68.5 | 3996.2 | 6.3 | 5.9 | 87.9 |
| 2006 | 502.1 | -2.6 | 3474.3 | -1.3 | 26.5 | -12.8 | 3949.9 | -1.9 | 5.3 | 88 |
| 2007 | 498.3 | -08 | 3495.5 | 0.6 | 40.8 | 54.0 | 3953.0 | 0.1 | 8.2 | 88.4 |

## 6% of industrial production

(quite a lot for a country with no raw material)

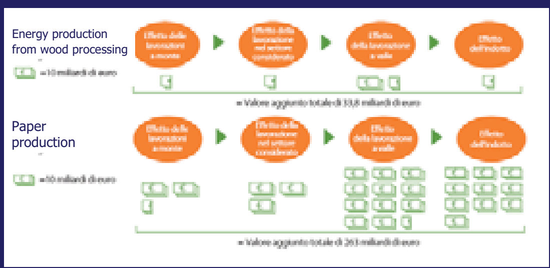


## Total employment effects of Italian Pulp&Paper industry




Source: Assocarta. 2008

## Total added value of Italian Pulp&Paper industry




Source: Assocarta. 2008

## 2. Italian pulp & paper sector: at the end of the recession?

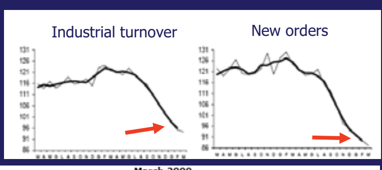
- P&P production: 94 M ton (-6.4% comparing to 2007 level; -8.5% in FIN; -4.7% in UK; -4.5% in Fr and Sp; -2.0% in G; -1.7% in Sw)
- P&P production value: 71 billion € (-6.7% comparing to 2007 level)
- Huge decreases in profit
- The lowest level of profit since 1995

2009:

- Negative short term trends (production in the first 3 months of 2009 is decreasing at the same rate)
- One important positive market signal: in Q1-2009 orders for packaging papers are increasing

## 2009: indicators of general industrial supply

Probably we are getting close to the lowest level, but at a rate that is decreasing




March 2009

Indices of industrial turnover and orders in manufacturing

| Indices | Index number (2005=100) | Percentage changes | |
|---|---|---|---|
| | March 2009 | March 2009 compared to March 2008 | Jan. – Mar. 2009 compared to Jan. – Mar. 2008 |
| Total turnover | 102.0 | -17.5 | -22.4 |
| Domestic turnover | 99.7 | -16.5 | -21.3 |
| Non domestic turnover | 107.9 | -19.9 | -25.1 |
| Total orders | 99.4 | -26.0 | -30.6 |
| Domestic orders | 100.2 | -22.0 | -29.2 |
| Non domestic orders | 97.8 | -33.0 | -33.1 |

Source: ISTAT

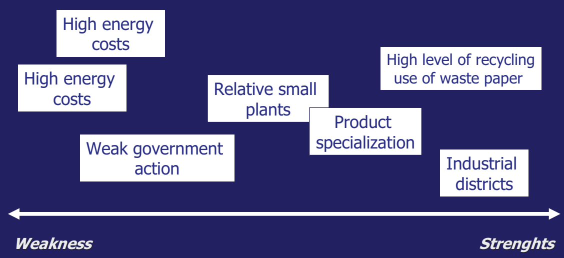
## Industrial turnover in March 2009 (2005 =100)

| | Mar 09 / Mar 08 | Gen-Mar 09 / Gen-Mar 08 |
|---|---|---|
| B Estrazione di minerali da cave e miniere | -2,2 | -3,1 |
| C Attività manifatturiere | -22,8 | -22,6 |
| CA Industrie alimentari, bevande e tabacco | -2,7 | -4,4 |
| CB Industrie tessili, abbigliamento, pelli e accessori | -18,7 | -13,1 |
| CD Fabbricazione di coke e prodotti petroliferi raffinati | -29,4 | -30,2 |
| CE Fabbricazioni di prodotti chimici | -28,9 | -29,4 |
| CF Produzione di prodotti farmaceutici di base e preparati farmaceutici | -6,3 | -3,8 |
| CG Fabbricazione di articoli in gomma e materie plastiche, altri prodotti della lavorazione di minerali non metalliferi | -20,7 | -23,4 |
| CH Metallurgia e fabbricazione di prodotti in metallo (esclusi macchine e impianti) | -35,2 | -35,2 |
| CI Fabbricazione di computer, prodotti di elettronica e ottica, apparecchi elettromedicali, apparecchi di misurazione e orologi | -11,2 | -9,3 |
| CJ Fabbricazione di apparecchiature elettriche e apparecchiature per uso domestico non elettriche | -30,2 | -28,3 |
| CK Fabbricazione di macchinari e attrezzature n.c.a. | -22,7 | -23,3 |
| CL Fabbricazione di mezzi di trasporto | -36,4 | -35,1 |
| CM Altre industrie manifatturiere, riparazione e installazione di macchine ed apparecchiature | -11,2 | -10,3 |

## New orders in March 2009
**(2005 =100)**

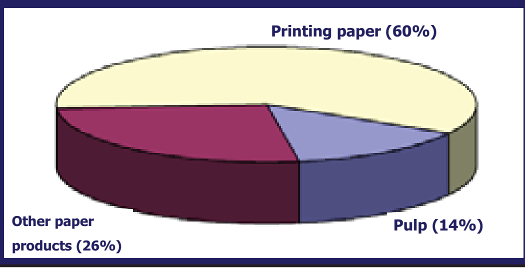
| | Mar 09 / Mar 08 | Gen-Mar 09 / Gen-Mar 08 |
|---|---|---|
| Industrie tessili, abbigliamento, pelli e accessori | -16,4 | -18,4 |
| | | |
| Fabbricazioni di prodotti chimici | -26,4 | -30,1 |
| Produzione di prodotti farmaceutici di base e preparati farmaceutici | -3,0 | -2,8 |
| Metallurgia e fabbricazione di prodotti in metallo (esclusi macchine e impianti) | -36,4 | -38,9 |
| Fabbricazione di computer, prodotti di elettronica e ottica, apparecchi elettromedicali, apparecchi di misurazione e orologi | -28,3 | -25,1 |
| Fabbricazione di apparecchiature elettriche e apparecchiature per uso domestico non elettriche | -28,3 | -28,5 |
| Fabbricazione di macchinari e attrezzature n.c.a. | -27,2 | -31,9 |
| Fabbricazione di mezzi di trasporto | -30,0 | -43,3 |

## Strenghts and weakness




## Strong product specialization

No large production of paper products for mass production, but strong specialization in high Added Value products: tissue and sanitary paper, coated papers and other special printing papers




## Industrial districts

- In the North-East (3 Regions): 31% of national production of printing paper
- Considering other 2 regions (almost 60% of national production)
- Tuscany: 20% paperboard production (→ packaging)

## The hot issue of biomass procurement

- Italy: large internal production of wood biomass + 1st world importer of fuelwood and 2nd of chips and wood residues
- Competition in the use of (subsidized) wood biomass.  CEPI report: the use of wood biomass for P&P production and recycling is creating 6 times more employment opportunities and 4 time more Added Value than biomass combustion for energy

## FLEGT, ENA-FLEG and new EU regulation on due diligence

- Italy: the 2nd larger importer of wood products in Europe
- UK: 80% of imported wood FSC or PEFC certified; no information available about Italy; no clear public procurement policies implemented → probably the largest European importer of illegal wood
- No effective interest and action by the State authorities (lack of Inter-Ministerial coordination)

- No initiative related to VPA under the FLEGT Regulation
- 14th country in the WWF FLEGT barometer

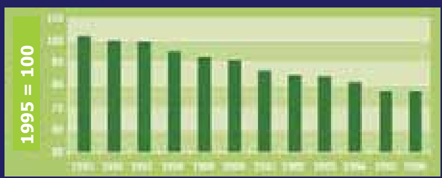
http://barometerwwforguk/barometerasp

## 3 Adaptation strategy in a period of turmoil

- Energy costs reduction
- PR activities: → public support
- Further greening of the industry
- Increasing the domestic supply of raw material

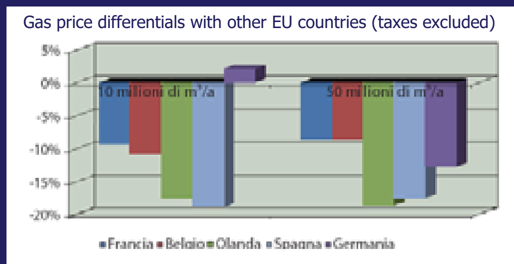
## Energy consumption

- The most relevant energy source: gas (25 billion cubic meters)
- P&P industry: more than 10% of the national industrial consumption (20 billion cubic meters): 55% for thermal energy production and 45% for power production
- Relevant decrease of energy consumption per unit of product. but still a very energy intensive sector




Source: Assocarta

- 2004-08: increased real prices and increased price differentials with other EU countries
- Still *de facto* control of prices by a monopolistic company (ENI): lack of intervention by State and EC authorities

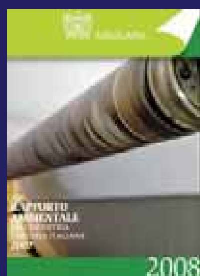



Source: Assocarta

- To contrast this trend: an increasing lobbying organized by the Consortium (created in 2001) made up of 237 companies in the most energy intensive industrial sectors (5 billion cm gas) for promoting a common procurement policy

## Further greening of the sector

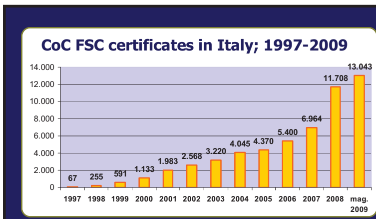
### Environmental performances




- Special attention to the small P&P plants: support by Assocarta to the ISO 14001 and EMAS Regulation implementation (Guidelines; Standard EMS Manual and standardized documentation)
- Creation of an Environmental Observatory → Annual Environmental Report of the P&P sector
- DB of env legislation relevant for the P&P sector (more than 800 national regulations) + link to the CEPI DB

## PR activities

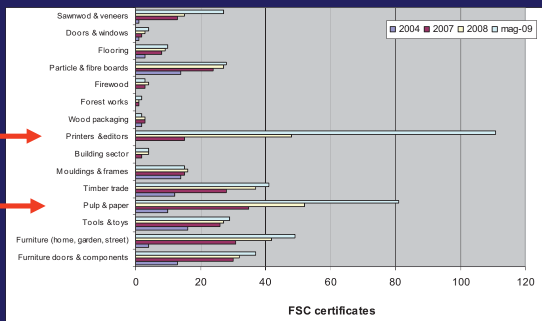

http://wwwassocartait/files/Luoghi_Comuni_2009pdf




88 new in the first 5 months of 2009


- FSC CoC certificates (443; 35.5% in the P&P)

Similar trends with PEFC (183 CoC certificates)




## Increasing the domestic supply of raw material

PRO-POPULUS project

# 4. Conclusions

- Severe impacts of economic crises on the P&P industry
- Negative trends are exacerbated by some special features of Italian P&P sector (export oriented production, weak internal demand, energy costs, lack of domestic production of raw material, …)
- Negative short term prospects, but with some weak signal of future demand increase

The road towards
a full recovery
is still long …

**Main sources of information**

- Assocarta Le attività di Assocarta nel 2007
  Edizione Tecniche Nuove
  http://wwwassocartait/it/assocarta/AttivitaAssocarta_2008pdf
- Assocarta 2008 Rapporto Ambientale 2008
  Edizione Tecniche Nuove
  http://wwwassocartait/it/assocarta/RapportoAmbientale_2008pdf
- IPI L'industria della carta e del cartone wwwridittit/documenti/Cartapdf
- Gruppo di Lavoro Nazionale APAT-ARPA Analisi ambientale per comparto

  produttivo; APAT. 2003 http://wwwapatgovit/site/_files/Industria_Cartariapdf

# The Impacts of the Financial Crisis on Forest Industry

Jukka Tissari
50th ACPWP
FAO, Rome

*26 May 2009*

Forestry

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## Structure of presentation

1. World's Financial Crisis
2. Influence on Forest Industries
3. Global Forest Products Consumption
4. Way Out
5. Points for Further Discussion

Forestry

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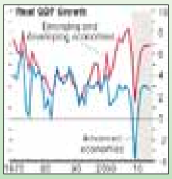
## 1. World's Financial Crisis

- World economy is undergoing one of the most dangerous financial shocks since the 1930s.
- The IMF has sharply lowered its economic forecast: the world economy will shrink for the first time in 60 years during 2009.
- A "downward spiral in loss of confidence".
- Countries are in different phases of the crisis.




Source: IMF, April 2009

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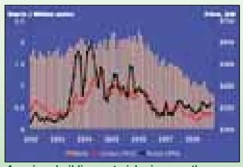
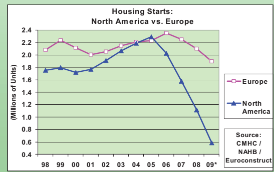
## 2. Influence on Forest Industries

- 2009 US new housing starts at 458,000.
- Housing starts are expected to remain weak at least until the second half of 2009-2010.
- N-Am. structural wood production:
  - Softwood lumber demand down 50% since 2005
  - Hardwood lumber down 35%
  - Structural panels down 37% since 2005
  - Engineered wood products (EWP) down 30%
- Effects of housing problems ripple through entire wood products value-chain.



American building material prices are the lowest since the Second World War

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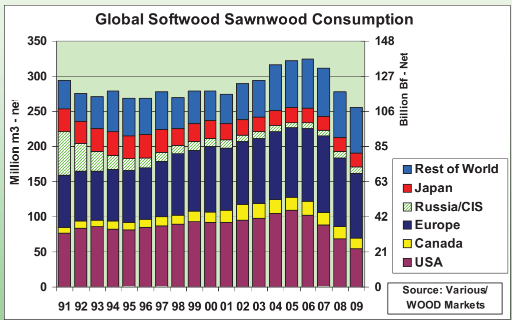
## 3. Global Forest Products Consumption 1/5




Source: International Wood Markets Group Inc. 2009

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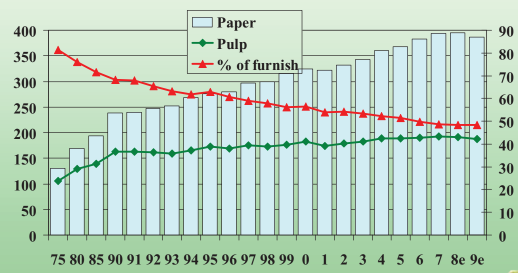
## 3. Global Forest Products Consumption 2/5

Global Pulp and P&B Consumption

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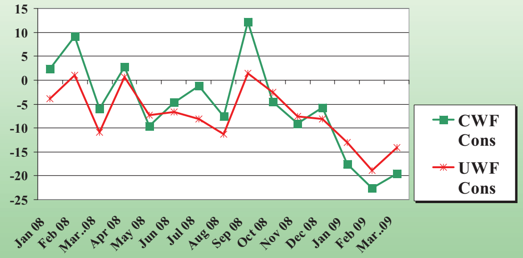
## 3. Global Forest Products Consumption 3/5

European Fine Paper Consumption

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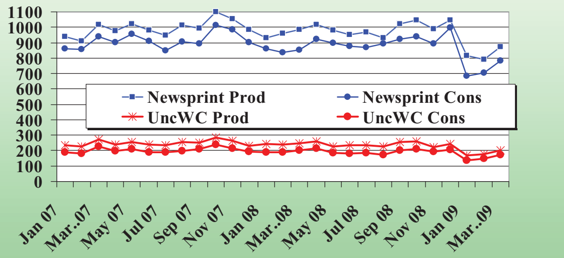
## 3. Global Forest Products Consumption 4/5

European Newsprint & Mechanicals Consumption

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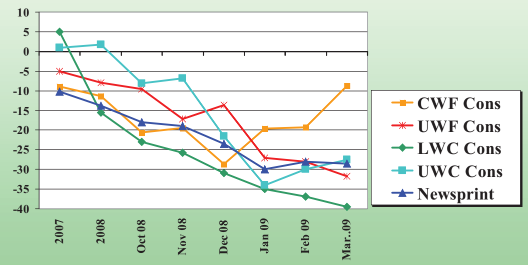
## 3. Global Forest Products Consumption 5/5

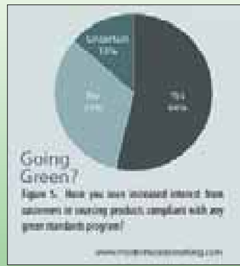
North American Consumption




Forestry

## 4. Way Out 1/3

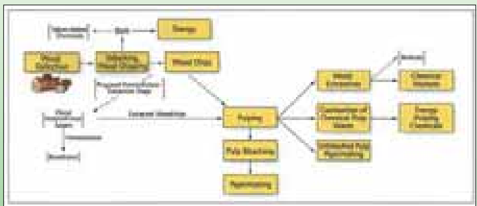
- **Green building:**
  - **mitigating climate change through substituting wood for non-renewable building materials**
  - **inherent low $CO_2$ footprints in wood products, carbon storage in harvested wood products (HWP), energy efficiency, building systems and low building costs**
  - **carbon displacement factors communicated**
  - **professional wood promotion and awareness-raising among builders and owners**




Forestry

## 4. Way Out 2/3

- **Integrating pulp with biofuels and green chemicals: biorefinery**



**More valuable products from wood**: pellets, liquid biofuels, gasified fuels, sugar-based chemicals and polymers, wood composites, sulfur-free lignin for polymer, polyurethane, syngas production.

Forestry

## 4. Way Out 3/3

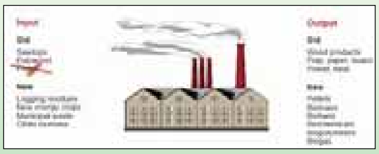
What needs to be changed?

Who finances it?

In the short term (2009-10) investors remain risk averse.

Less debt and more equity: collaborating with venture capital and private equity firms to make the best use of limited R&D funding.

**Potential demand exists!**

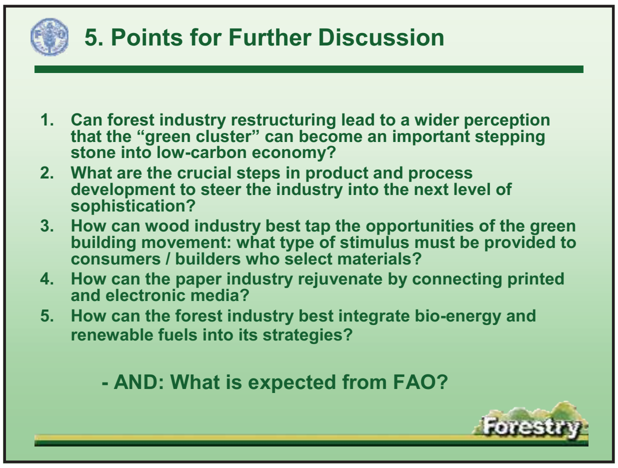


**Targets for biofuels of total transportation fuels**

| | [illegible] | [illegible] | [illegible] |
|---|---|---|---|
| Australia | 5 | 5 | 20 |
| Brazil | 5 | 5 | 5 |
| EU | 5.75 | 5.75 | 10 |
| India (concerns only diesel) | - | 20 | 20 |
| Canada | 5 | 5 | 5 |
| China | 10 | 10 | 15 |
| USA | | 4.6 | 4.6 |

**Source: Finnish Forest Association**

Forestry

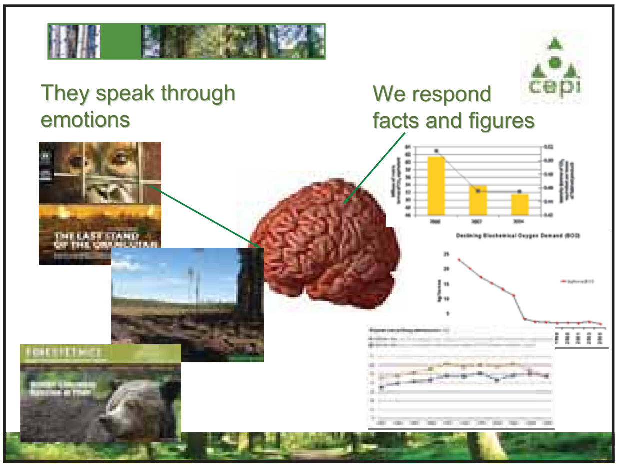

5. Points for Further Discussion
1. Can forest industry restructuring lead to a wider perception that the "green cluster" can become an important stepping stone into low-carbon economy?
2. What are the crucial steps in product and process development to steer the industry into the next level of sophistication?
3. How can wood industry best tap the opportunities of the green building movement: what type of stimulus must be provided to consumers / builders who select materials?
4. How can the paper industry rejuvenate by connecting printed and electronic media?
5. How can the forest industry best integrate bio-energy and renewable fuels into its strategies?
- AND: What is expected from FAO?
Forestry

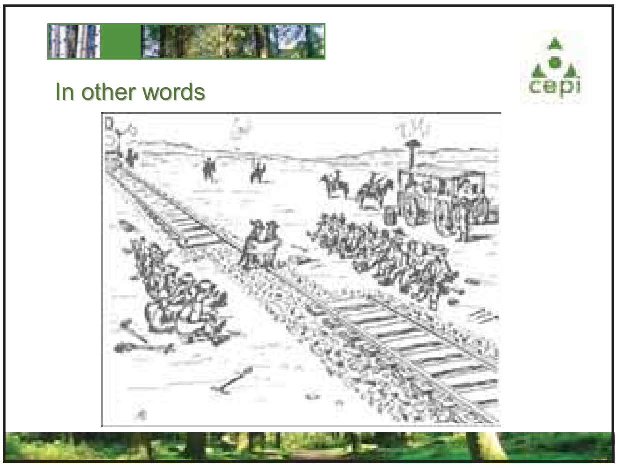

cepi
Joint Communication for the Forest Industry
FAO ACPWP, Rome


Where do misperceptions come from?
• Direct campaigns by ENGOs
cepi
HOW TO DESTROY CANADA'S ANCIENT BOREAL FOREST, IN 3 EASY STEPS


cepi
HARRY POTTER'S LASTING LEGACY


Where do misperceptions come from?
• Indirect consequences of ENGOs campaigns
cepi
$
protect the world's trees
IATA
Finally, electronic tickets are more environmentally friendly. Eliminating paper tickets will save the equivalent of 50,000 mature trees per year or about 5 square kilometres or 2 square miles of forest.
La facture électronique pour réduire la consommation de papier
En novembre 2005, France Télécom s'est associée au WWF pour inciter ses clients à abandonner la facture papier au profit d'une facture sur le Net. Ce partenariat repose sur un mécanisme simple : pour chaque nouvelle facture sur le Net souscrite, France Télécom s'engage à soutenir le programme préservation de la forêt des Maures mené par le WWF.


They speak through emotions
We respond facts and figures
cepi
THE LAST STAND OF THE ORANGUTAN


In other words
cepi

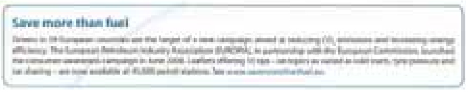
## What can we do

**The industry**

- Address the emotional slogans
- Show we are reponsible industry

**FAO**

- Spread facts
- Facilitate dialogue


Save more than fuel

## What do we have to be proud of?

- Sustainable Forest management
- Benefits of RES
- Climate change mitigation
- A natural and renewable sector
- A whole lot more…………

## What resources do we have?

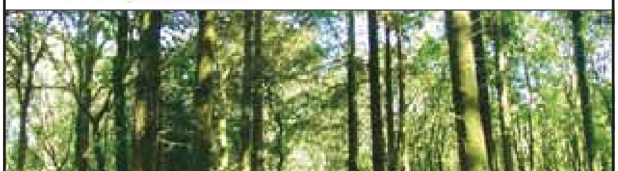
- Forest Communicators' Network
- Wood for Good, Le Bois c'est essentiel, etc. campaigns
- Abundant Forests Alliance
- Certification systems
- ICFPA and its members
- The entire value chain and its associations

## How do we do it?

- Build joint messages for the entire sector
- Ensure we all use the same language, facts and figures
- Pick our fights (real issues and real opinion leaders)
- Stick to our guns and remain positive

## What have we done already……

More?



**Thanks for listening!**


Forest Communication at European Level
Challenges and Solutions
Ingwald GSCHWANDTL
Rome
26 May, 2009


What I will talk about
Why communicate on forests at European level
How to do it - a strategic approach
Who would do it
The European Forest Week 2008
as example for concerted action
The UNECE FAO Forest Communicators Network
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009


Communication usually fails
except by accident. Osmo A. Wiio
The probability that communication
works is low. Niklas Luhmann
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009


language barriers,
cultural differences,
personal/institutional discrepancies,
lack of attention in critical moments,
etc.
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009


Forests mean different things
to different people
•complexity
•conflicting interests
•emotional attachement
Forest Communication at European Level
Ingwald GSCHWANDTL


The Forest Sector is divers
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009

## Why communicate at European level?

EU
MCPFE
UN-FCCC
UN-CBD
UNFF
e.a.

Relevant decisions are taken internationally

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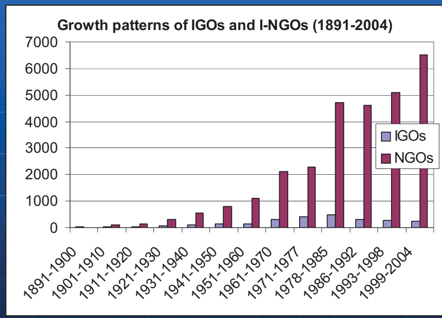
## NGO's have increasing influence

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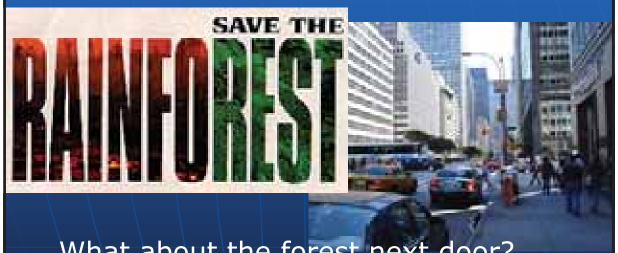
## Urbanisation and Globalisation forms peoples minds




What about the forest next door?

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***Facts are facts,***
***but perception is reality.***

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## Forest Facts

***Good news***
*➢Forest area increasing*
*➢Growing stock increasing*
*➢Vitality and health improved*
*➢Biodiversity is supported by SFM*

***Bad news***
*➢Forest fires*
*➢Storms*

download at
www.mcpfe.org/publications/pdf/

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## Public Perception

**download at www.mcpfe.org/publications/pdf/**

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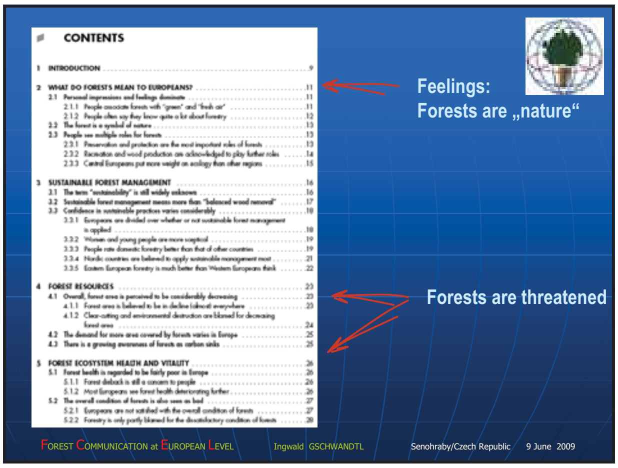
CONTENTS
Feelings:
Forests are „nature“
Forests are threatened
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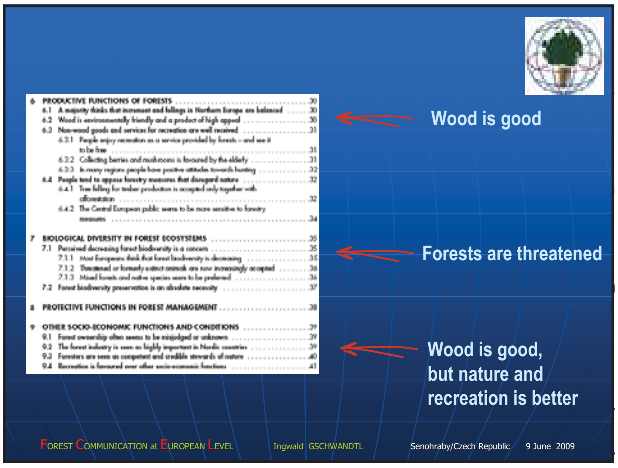
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009


Wood is good
Forests are threatened
Wood is good,
but nature and
recreation is better
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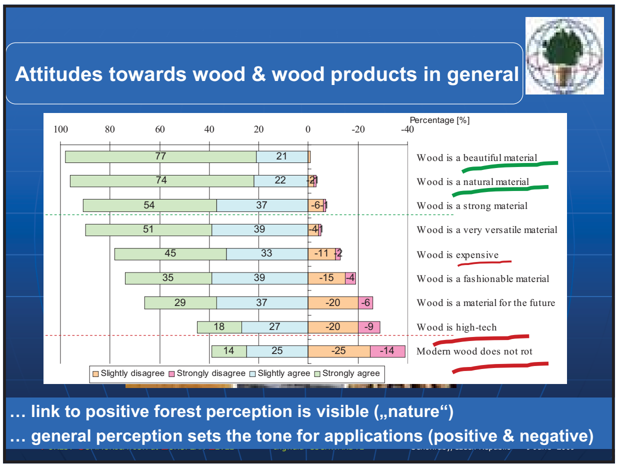
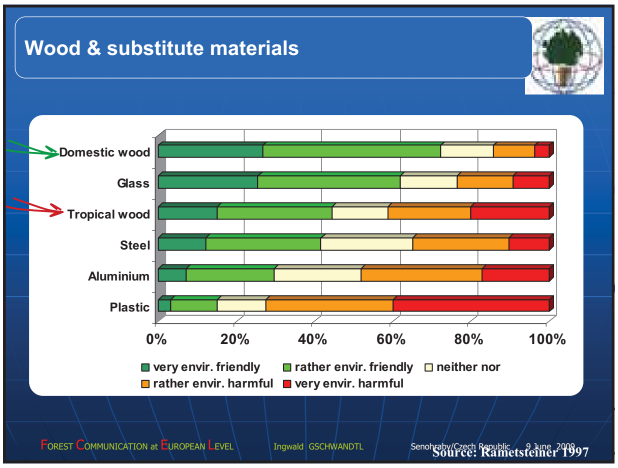
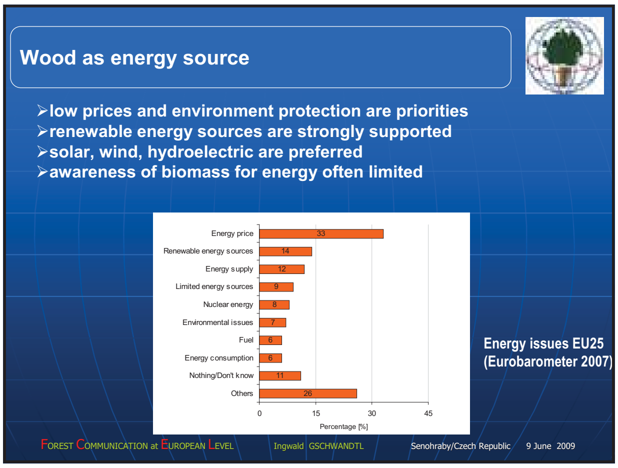

Attitudes towards wood & wood products in general
Percentage [%]
Wood is a beautiful material
Wood is a natural material
Wood is a strong material
Wood is a very versatile material
Wood is expensive
Wood is a fashionable material
Wood is a material for the future
Wood is high-tech
Modern wood does not rot
Slightly disagree
Strongly disagree
Slightly agree
Strongly agree
… link to positive forest perception is visible („nature“)
… general perception sets the tone for applications (positive & negative)


Wood & substitute materials
Domestic wood
Glass
Tropical wood
Steel
Aluminium
Plastic
0%
20%
40%
60%
80%
100%
very envir. friendly
rather envir. friendly
neither nor
rather envir. harmful
very envir. harmful
FOREST COMMUNICATION at EUROPEAN LEVEL
Ingwald GSCHWANDTL
Source: Rametsteiner 1997


Wood as energy source
➢low prices and environment protection are priorities
➢renewable energy sources are strongly supported
➢solar, wind, hydroelectric are preferred
➢awareness of biomass for energy often limited
Energy price
Renewable energy sources
Energy supply
Limited energy sources
Nuclear energy
Environmental issues
Fuel
Energy consumption
Nothing/Don't know
Others
Percentage [%]
Energy issues EU25
(Eurobarometer 2007)
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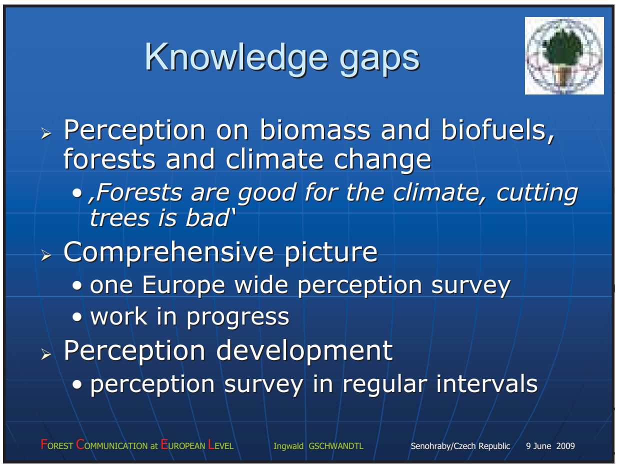
Knowledge gaps
Perception on biomass and biofuels, forests and climate change
‚Forests are good for the climate, cutting trees is bad‘
Comprehensive picture
one Europe wide perception survey
work in progress
Perception development
perception survey in regular intervals
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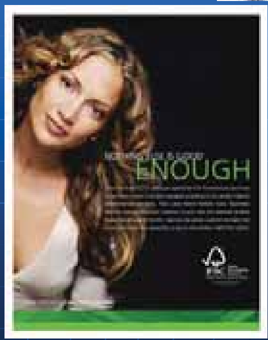
Ingwald GSCHWANDTL
Senohraby/Czech Republic
9 June 2009

## The mass media communication dilemma

Sex, conflict and desaster sells.

Good news are bad news.






## The Media

THE NEW YORKER

A Reporter at Large

**The Stolen Forests**

**Inside the covert war on illegal logging.**

by Raffi Khatchadourian October 6, 2008

*Message: Forests are a problem*

Timber in the train station at Suifenhe, China.
The country is now the world's largest importer of logs and exporter of finished wood products.
Photograph by Lu Guang.



## It's not enough to do a good job,

make yourself understood!



## Purpose

- ***Closing the gap between public perception and facts regarding forests and forestry***
- ***Gaining more influence on political decisions relevant to forests***



## Communication Process

- long term oriented systematically carried out communication process based on
  - sound data
  - reliability
  - openness and transparency
  - fairness
  - continuity



## Systematic communication

**Status Quo**

**Communication Objectives**
simple, achieveable
measureable

**Target Audience**
precisely defined

**Message**
clear, concise
comprehensible, credible

**Communication plan**
Measures, Means, Timing, Resources

**Implementation**

**Evaluation**

## Who would do it

- European Institutions and Organisations
  - Ministerial Conference on the Protection of Forests in Europe
  - FAO European Forestry Commission
  - ECE Timber Committee
  - European Commission
  - EUSTAFOR
  - CEPF
  - CEPI
  - EFI
- National Institutions, Organisations and Enterprises

*Concerted actions!*

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## Forest Communicators Network

- ***Established by UNECE and FAO***
- ***Current mandate 2008 – 2013***
- ***ECE region (pan-Europe and N-America)***
- ***Participation open to all sharing the overall objectives***

http://timber.unece.org/index.php?id=95

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## Forest Communicators Network

### Overall Objectives

- ***improve communication on forests***
- ***foster international cooperation to this end***
  - ***mutual learning***
  - ***joint activities***

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## Forest Communicators Network

### Who is it?

***Over 100 people from 32 countries and 18 Organisations and Institutions from both public and privat sector***

| | | |
|---|---|---|
| *Leader:* | *Ingwald Gschwandtl* | *AT* |
| *Deputy Leaders:* | *Kai Lintunen* | *FIN* |
| | *Colin Morton* | *UK* |
| | *Tomas Kotovits* | *LV* |
| | *Marta Gaworska* | *CEPF* |

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## Forest Communicators Network

### How it works

- ***informal interaction***
- ***e-mail***
- ***meetings***
- ***Subgroups and Task Forces***
- ***publications***
- ***workshops (Train the Trainers)***
- ***fully dependent on contributions of individuals and institutions***

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## Towards a European Forest Communication Strategy

- **EU Forest Action Plan**
  **Workshop ‚Taking us out of the Woods‘ Pardubice/CzR**
- **Forest Communicators Network**
  **Task Force on strategic aspects**
  - **Recommendations addressed to communication partners**
  - **Public perception analyses**
  - **Proposals for overall objectives and actions**

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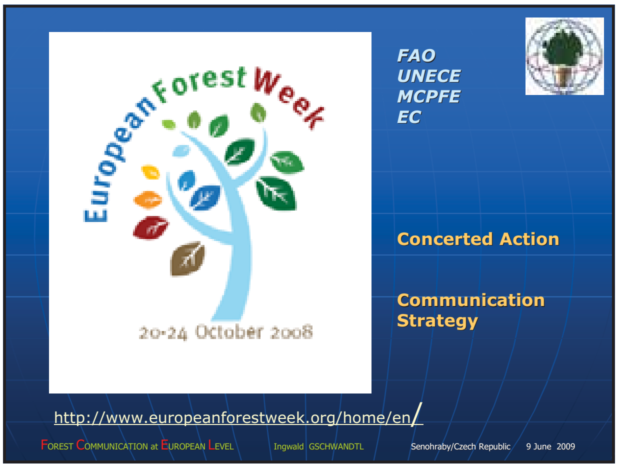
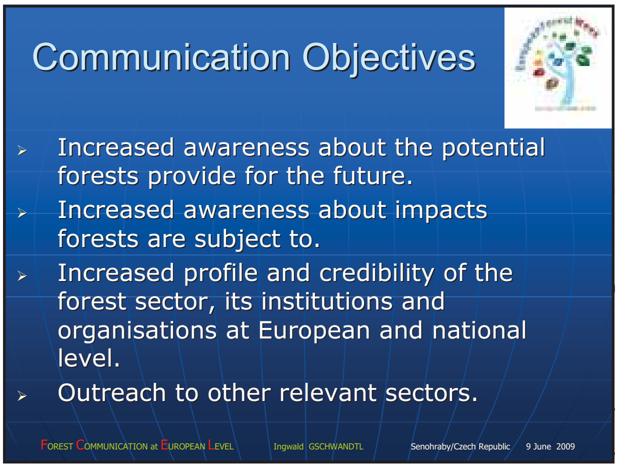

European Forest Week
20-24 October 2008
FAO
UNECE
MCPFE
EC
Concerted Action
Communication Strategy
http://www.europeanforestweek.org/home/en/
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic 9 June 2009


Communication Objectives
Increased awareness about the potential forests provide for the future.
Increased awareness about impacts forests are subject to.
Increased profile and credibility of the forest sector, its institutions and organisations at European and national level.
Outreach to other relevant sectors.
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic 9 June 2009


The central Message
Europe's forests enrich our lives and help save the planet
They cover 44 percent of Europe's land area and continue to expand.
They combat climate change by continuously absorbing and storing harmful greenhouse gases.
In our changing climate our oldest renewable source of material and energy is still the smart choice in the 21st century.
The European Forest Week is about increasing understanding of the importance of our forests and the value of using them.
Forest Communication at European Level
Ingwald GSCHWANDTL
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Communication partners
At European level
decision makers (policy makers, parliamentarians, DG's, lobbyists, NGO's) from various sectors relevant to forests,
inter alia: climate change, energy providers, agriculture, forest based industries, construction industry, environment, tourism
media
celebrities
At national level
forest related stakeholders
stakeholders from other sectors
schools, universities, children, youth organisations
civil society organisations
media
Forest Communication at European Level
Ingwald GSCHWANDTL
Senohraby/Czech Republic 9 June 2009


European Forest Week
20-24 October 2008
A big event in Rome
150 events in 30 countries
organised around one central message
Remarkable media coverage
A steping stone?
http://www.europeanforestweek.org/home/en/
Forest Communication at European Level
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Forest Communication at European Level
a call for
Concerted Action
Ingwald GSCHWANDTL
Rome 26 May 2009