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ASIA-PACIFIC FORESTRY COMMISSION

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STATE OF FORESTRY IN ASIA AND THE PACIFIC

SECRETARIAT NOTE

1. The Global Forest Resources Assessment (FRA) 2015 estimated total forest area in the Asia-Pacific region in 2015 to be 723 million hectares.¹ This is an increase of 5 million hectares since 2010 and 20 million hectares since a low point of 703 million hectares recorded in 2000. However, this regional increase is the result of significant reforestation efforts in a few countries including China, India, the Philippines and Viet Nam. Many countries in the region are still experiencing significant forest loss.
2. The distribution of forests among Asia-Pacific subregions is relatively uneven, particularly on a per capita basis. For example, South Asia accounts for 23.2 percent of the global population, but has only 2.1 percent of the world's forests. Similarly, East Asia has only 6.4 percent of the world's forests, but 22 percent of the population. Conversely, Oceania has only 0.5 percent of the global population, but has 4.3 percent of the world's forests. Southeast Asia has 8.6 percent of the global population and 5.3 percent of the world's forests. In total, the Asia-Pacific region has 54.3 percent of the global population, but only 18.1 percent of the world's forests.
3. Despite the overall increase in the region's forest area, deforestation and forest degradation remain significant problems in many countries and localities. The total area of primary forest in Asia and the Pacific declined from 147.7 million hectares in 2005 to 141 million hectares in 2015, a loss of 6.7 million hectares. The total area of other naturally regenerated forest also declined between 2005 and 2015, from 458.7 million hectares to 455.7 million hectares – a decrease of 3 million hectares. Thus, total natural forest in the Asia-Pacific region is estimated to have declined by 9.7 million hectares between 2005 and 2015. However, the absence of comprehensive national inventory work in many countries means that the dynamics of forest cover change are not fully captured in FRA data. In particular, many countries use proxy data to estimate primary forest cover and for many of these countries, area statistics remain unchanged over long periods of time. Consequently, it is likely that degradation or conversion of primary forest to other naturally regenerated forest (secondary forest) is significantly higher than the statistics indicate. In an effort to estimate the extent of forest degradation worldwide, FAO analyzed time series of remote sensing data between 2000 and 2012 to detect partial

¹ This total excludes Asiatic forests in the Russian Federation.

canopy cover loss. The analysis found that, globally, the greatest amount of partial canopy cover loss was in South and Southeast Asia, with more than 50 million hectares of partial canopy cover loss, indicating substantial forest degradation and most likely at least some conversion of primary to secondary forest.

4. Conversely, the area of planted forests in the region has continued to increase, from 108 million hectares in 2005, to 126.1 million hectares in 2015; an increase of 18.2 million hectares. The Asia-Pacific region remains the world leader in terms of planted forest establishment; 43 percent of the world's planted forests are located in the region.

5. Restoration and rehabilitation of forests has become an important focus in the region, with many countries initiating national forest restoration programmes and/or subscribing to global, regional or subregional targets and initiatives. For example, the 2014 New York Declaration on Forests aims to cut natural forest loss in half by 2020, and strive to end it by 2030, while at the same time restore 150 million hectares of degraded landscapes and forest lands by 2020 and at least an additional 200 million hectares by 2030. This global target builds on earlier global and regional targets such as: (i) the 2011 Bonn Challenge – which similarly aims to bring 150 million hectares of the world's deforested and degraded land into restoration by 2020, and 350 million hectares by 2030; and (ii) the Asia-Pacific Economic Cooperation (APEC) 2020 Forest Cover Objective of increasing forest cover in APEC member economies by at least 20 million hectares of all types of forests by 2020. At national levels, these objectives have been increasingly supported by a variety of formal programmes, targeting forest expansion through a variety of methods including plantation establishment, assisted natural regeneration, ecological restoration and community tree planting.

6. Production of industrial roundwood in the Asia-Pacific region has been increasing since 2005. In 2016, production of industrial roundwood was estimated at 440 million m³, an increase of almost 39 percent on the 2005 volume. In global terms, this represents an increase from 17.7 percent of the world's industrial roundwood production in 2005, to 23.6 percent in 2016. The Asia-Pacific region is also a significant net importer of industrial roundwood. Imports of industrial roundwood into Asia-Pacific countries in 2016 totaled 65.4 million m³, while exports of industrial roundwood from Asia-Pacific countries totaled 31.8 million m³; consequently, net imports (total imports less total exports) to the region amounted to 33.6 million m³ in 2016. Imports of industrial roundwood in the Asia-Pacific region have increased steadily since the turn of the century aside from a brief downturn during the global financial crisis. A significant trend has been substitution of tropical hardwood logs, by softwood logs from countries such as the Russian Federation, United States and New Zealand.

7. Production of sawn timber, paper and paperboard and, particularly, wood-based panels have grown strongly in the Asia-Pacific region during the past decade. Sawn timber production in 2016 was estimated at 126.7 million m³, an increase of 58 percent over 2005 levels. Wood-based panel production increased from 97.7 million m³ in 2005, to 241.7 million m³ in 2016, an increase of 147 percent. Paper and paperboard production increased from 125.4 million tonnes in 2005 to 190 million tonnes in 2016, an increase of 52 percent. Production of many other secondary processed and manufactured products including furniture and componentry also increased rapidly during the past decade, particularly those destined for export markets. In terms of the proportion of global production of processed wood products, the Asia-Pacific share of sawn timber production has increased from 18.2 percent in 2005 to 27.3 percent in 2016. In the same period, the region's share of wood-based panel production increased from 37.6 percent to 59 percent and the share of paper and paperboard increased from 34.4 percent to 46.5 percent.

8. Overall, the value of trade in wood products in the region has grown substantially during the past decade. In 2016, the value of forest product² imports by countries in the region was estimated at US\$81.8 billion, an increase of 74 percent compared with 2005. Similarly, exports of forest products by

² Roundwood, sawntimber, wood-based panels, pulp, paper and paperboard.

Asia-Pacific countries were estimated to have a value of US\$48.7 billion, an increase of 88 percent on the US\$48.6 billion recorded in 2005.

9. Broader changes in society continue to have driven enormous change in the region's forests and continue to have profound impacts on forests. Key drivers of change from outside the forest sector include demographic and economic developments, political and institutional conditions and scientific/technological progress, as well as changes in the ways that societies perceive forests and the mix of products and ecosystem services that are required to be delivered. Many of the region's developing countries continue on high population and economic growth trajectories placing increasing pressures on natural resources, including forests. Rapid economic growth in high population countries such as China and India is generating fundamental changes in production, consumption and trade of forest products and demand for, and provision, of ecosystem services. Rapid economic growth has enabled significant reductions in poverty in most countries in the region. However, the large proportion of the region's population that remains impoverished continues to present an enormous challenge to the region. In particular, widening disparities between urban and rural populations have created a variety of challenges including urban drift, gentrification of rural populations (leaving an increasingly aging workforce to manage forests and farms), degradation of natural resources, discrepancies in living standards and provision of infrastructure and services within some countries.

10. Broader societal changes have helped to drive a major transition in the focus of forest policies in Asia-Pacific countries in the past several decades. In particular, there has been a significant shift from timber-focused management to far greater attention being given to aspects of forest protection, conservation and attention to provision of a wider range of goods and ecosystem services. Most countries have developed formal overarching forest policies or policy statements centering on principles of sustainable forest management (SFM). Key trends include increased attention being given to environmental aspects of forest management with provision of ecosystem services garnering significant attention, while emphasis is also increasingly being given to collaborative approaches that involve a wide range of stakeholders in forest management, including – in several countries – devolving forest management responsibilities to communities and/or the private sector and consultation and involvement in forest policy formulation. Climate change-related considerations, including activities related to both mitigation and adaptation, continue to have a heavy influence on forest sector activities and are increasingly being embedded in forest policies. Other key themes included in forest policy include forest governance and law enforcement, forest rehabilitation, poverty alleviation and building resilience in forest-dependent communities. Policies to protect against forest invasive species and wildfires and safeguarding forest health are a focus in many economies. In addition to forest policies, a plethora of policies in related sectors impact on forests and forestry. Some policy objectives overlap several sectors including forestry; for example, policies dealing with biodiversity, infrastructure development, protection of wildlife and desertification. Furthermore, policies and investments in other sectors – agriculture, industry, energy, rural development, trade and so forth – increasingly heavily influence the forest sector, even as they are directed at issues far outside of it, thus calling for the urgent development and promotion of 'forest-smart' investments in these sectors.

11. Several key international developments in recent times include substantive forestry components. In particular, agreement of the 2030 Agenda for Sustainable Development (the Sustainable Development Goals) and the Paris Agreement on Climate Change provide frameworks for mounting comprehensive global and regional responses to demands for equitable sustainable development and the challenges of climate change. While these agreements are likely to play significant roles in shaping the future of the forest sector in the region, this sector also has substantial roles to play in the implementation of these Agreements.

12. Consistent with the session's theme of *Forestry in a new landscape*, the forest sector in Asia and the Pacific is part of a dynamic, vibrant and rapidly evolving region. Forestry faces some significant challenges, particularly in relation to arresting deforestation and forest degradation and renewing the resource base. However, at the same time, there are enormous opportunities to position the forest sector as a key component in the highly inter-disciplinary global sustainable development frameworks. With

appropriate policy and institutional settings, the forest sector can play key roles across a broad range of spheres: as an engine for economic growth; as a vehicle for poverty alleviation; as a tool for both climate change mitigation and adaptation; as an instrument for enhancing livelihoods and increasing resilience to disasters; as a means of protecting against land degradation and enhancing soil and water conservation; as a source of renewable energy; as a central plank of biodiversity and genetic conservation efforts; and many more. A key will be for the forest sector to more strenuously advocate its potential in interdisciplinary frameworks and assume more visible leadership in a rapidly changing world.

Points for consideration

The Commission may wish to:

- Reflect on the opportunities that the evolving global landscape presents for the Asia-Pacific forest sector and identify potential roles the Commission might play in helping countries to realize these opportunities;
- Consider the roles that the Asia-Pacific forest sector may play in implementation of the SDGs and the Paris Agreement and discuss opportunities for collaboration in forestry advocacy and implementation;
- Reflect on recent developments in the region and consider new developments in member countries that may be of particular significance and interest to other countries; and
- Consider opportunities and recommend collective action to advance progress towards SFM.