FO:APFC/2016/7

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January 2016

	منظمة الأغذية والزراعة للأمم المتحدة	联合国粮食及农业组织	Food and Agriculture Organization of the United Nations	Organisation des Nations Unies pour l'alimentation et l'agriculture	Продовольственная и сельскохозяйственная организация Объединенных Наций	Organización de las Naciones Unidas para la Alimentación y la Agricultura

ASIA-PACIFIC FORESTRY COMMISSION

TWENTY-SIXTH SESSION

Clark Freeport Zone, Pampanga, Philippines, 22-26 February 2016

STATE OF FORESTRY IN THE ASIA-PACIFIC REGION

1. According to the Global Forest Resources Assessment 2015, forest area in the Asia-Pacific region in 2015 totals 723 million hectares, 18.1 percent of the global total. Forest area in the region has increased by 5 million hectares since 2010 and 20 million hectares since 2000. Nonetheless, deforestation and forest degradation remain significant challenges in many countries. Key direct drivers of deforestation and forest degradation include agricultural expansion, forest products extraction, infrastructure development, forest fires and climate and weather events. Underlying drivers of change include economic development (or lack of), population increases, governance factors, urbanization, and development of coherent cross-sectoral policies.

2. Broad trends indicate that, overall, the quality of forest management in the Asia-Pacific region is improving. Planted forest areas in the region have increased by slightly more than 16.8 percent since 2005. The area of forests in protected areas has also increased significantly. An important trend continues to be toward devolution of forest ownership and forest management responsibilities away from governments and toward the private sector, communities and households. Significant areas of forests have received forest management certification under the Programme for the Endorsement of Forest Certification or from the Forest Stewardship Council. However, these statistics tend to be dominated by a relatively small group of countries and significant improvements in forest management could be made in many countries.

3. Production of industrial roundwood in the Asia-Pacific region totaled 422 million m3 in 2013. The region is a net importer of industrial roundwood, with imports of industrial roundwood amounting to 64 million m3, while exports totaled 31 million m3. Consumption of industrial roundwood totaled 454 million m3. The largest consumers of industrial roundwood are China (214 million m3), Indonesia (63 million m3) and India (56 million m3). Collectively, these countries account for 73 percent of regional industrial roundwood consumption.

4. Production of sawn timber has increased significantly in the region over the past five years, from 92 million m3 in 2008 to 114 million m3 in 2013. Wood-based panel production has increased even more rapidly, from 114 million m3 in 2008 to 205 million m3 in 2013. Paper and paperboard production has increased from 147 million tonnes in 2008 to 178 million tonnes in 2013. Consumption of wood products has increased commensurately with production increases, although both have slowed in line with economic conditions in recent times. Investments in new processing capacity have continued until recently, suggesting continued growth in production.

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5. A significant change in the forest products sector in the region is a shift from being a regionally focused exporter of industrial roundwood and other less-processed items to being an internationally focused exporter of more value-added items, especially wood-based panels, paper and paper board and furniture. This is reflected in strong growth in the value of primary forest products exports, up from US$38 billion in 2008 to more than US$48 billion in 2013. Overall, the region remains a strong net importer of forest products with imports of primary forests products (valued at US$84 billion) exceeding exports by US$36 billion.

6. Wider societal changes have had profound impacts on forests in the region. A host of factors outside the forestry sector – demography, economy, political and institutional conditions and technological progress – work as important drivers of change for forests and forestry. Many of the region's developing countries continue on high population and economic growth trajectories placing increasing pressures on natural resources. 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 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, liquidation of natural resources, discrepancies in living standards and provision of infrastructure and services within some countries.

7. Most Asia-Pacific countries have developed well-defined forest policies and programs underpinned by objectives relating to sustainable forest management and sustainable development. However, in line with rapid societal changes, the need for countries to continue to develop new forestry legislation, policies and action plans are reflected in: increased focus on forest restoration and regeneration; new government and voluntary planting programs; conservation and protection programs, measures to reduce deforestation and regulate forest harvesting; forest-related climate change programs; strengthened forest tenure provisions; improved forest law enforcement and governance arrangements; and participation in global and regional processes that support improved forest management. The development of several forest-related Sustainable Development Goals and particularly the outcomes of the 21st Conference of the Parties to the United Nations Framework Convention on Climate Change can be expected to give significant impetus to forestry developments in the region.

8. Progress continues to be made in the development and implementation of a wide range of tools and mechanisms designed to promote and support the drive towards sustainable forest management. These include: compliance and voluntary carbon markets including REDD+; Forest Law Enforcement, Governance and Trade (FLEGT) Voluntary Partnership Agreements (VPAs); chain-of-custody verification; strengthening forest measurement, reporting and verification systems; the use of direct and indirect incentives supporting forest establishment and improved forest management including payment for environmental services (PES); codes of practice and voluntary guidelines for various aspects of forestry including plantation management, forest harvesting and fire management; reduced impact logging (RIL); and using defined systems of criteria and indicators for sustainable forest management.

Points for consideration

The Commission may wish to:

- 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.
- Consider opportunities for increased collaboration, and recommend collective action to advance progress toward sustainable forest management.