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ASIA-PACIFIC FORESTRY COMMISSION

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STATE OF FORESTRY IN THE ASIA-PACIFIC REGION: FORESTRY IN TRANSITION

SECRETARIAT NOTE

1. The Global Forest Resources Assessment 2010 estimates the total forest area in the Asia-Pacific¹ region to be 740 million hectares. This is comprised of 142 million hectares of primary forests; 478 million hectares of other naturally regenerated forests; and 120 million hectares of planted forests. Overall (net) forest cover in Asia and the Pacific has increased by approximately 1.4 million hectares per annum during the past decade, from a low point of 726 million hectares in 2000. However, the pace of increase in forest area has slowed significantly during the past five years. Between 2000 and 2005, forest area increased at an average rate of 2.3 million hectares per annum, while between 2005 and 2010 forest area increased by slightly less than 0.5 million hectares per annum.

2. Notwithstanding the overall increase in net forest area, significant areas of natural forests continue to be lost in the Asia-Pacific region. The total area of primary forest has declined from 145.5 million hectares in 2005 to 142 million hectares in 2010, a loss of 3.5 million hectares. The total area of other naturally regenerated forest has also declined between 2005 and 2010, from 485 million hectares to 478 million hectares – a decrease of 7 million hectares. Thus, total natural forest in the Asia-Pacific region is estimated to have declined by 10.5 million hectares between 2005 and 2010.

3. Conversely, the area of planted forests has continued to increase, from 107.5 million hectares in 2005, to 120 million hectares in 2010; an increase of 12.5 million hectares. However, the rate of planted forest establishment has slowed during the past five years compared to the first part of the decade. Between 2000 and 2005, 17 million hectares of planted forests were

¹ For the purposes of data categorization, the Asia-Pacific region is defined as encompassing the countries that are physically located in East Asia, South Asia, Southeast Asia and Pacific subregions, in their entirety.

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established. The Asia-Pacific region remains the world-leader in terms of planted forest establishment; 45 percent of the world's planted forests are located in the region.

4. Production of industrial roundwood in the region has remained stable during the past 25 years, remaining within the range of 250 million m³ to 300 million m³ throughout the period. In 2008, industrial roundwood production was estimated at 279 million m³. The Asia-Pacific region is a significant net importer of industrial roundwood. Imports of industrial roundwood into Asia-Pacific countries in 2008 totalled 52.7 million m³, while exports of industrial roundwood from Asia-Pacific countries totalled 19.4 million m³; consequently, net imports (total imports less total exports) to the region amounted to 33.3 million m³. Imports of industrial roundwood grew strongly throughout most of the past decade, from 43 million m³ in 2000 to a peak of 67.5 million m³ in 2007. The global economic downturn caused a substantial decrease in 2008.

5. Production of sawn timber, wood-based panels and paper and paperboard have grown strongly in the Asia-Pacific region during the past decade. Sawn timber production in 2008 amounted to 91.6 million m³, an increase of 44 percent over 2000 levels. Wood-based panel production increased from 49.3 m³ in 2000, to 114.8 million m³ in 2008, an increase of 132 percent. Paper and paperboard production increased from 95.8 million tonnes in 2000 to 147.4 million tonnes in 2008, an increase of 54 percent. Production of many other processed products also increased rapidly during the past decade, particularly those destined for export markets. For example, the value of furniture exported from the region increased from about US\$6.7 billion in 2000 to about US\$17.7 billion in 2007.

6. Forest policies in the Asia-Pacific region have undergone major changes, involving a shift from timber-focused management to multiple-use management that gives far greater attention to a wide range of goods and services. In many cases, provision of ecosystem services has become a major thrust. Economic growth, globalization, trade liberalization and increased focus on sustainable development have all directly and indirectly influenced forest policies. Key trends in forest policy development and formulation include: increased emphasis on ecological aspects with provision of ecosystem services gaining primacy; and emphasis on increased involvement of stakeholders in forest management. Eleven countries in Asia have entered into partnerships with the National Forest Programme Facility – these are: Bhutan, Cambodia, PR China (Phase II), Indonesia, Lao PDR, Mongolia, Nepal, Pakistan (Phase II), Philippines, Thailand and Vietnam. In the Pacific, partnerships have been established with Palau and Vanuatu and the Secretariat of the Pacific Community (SPC).

7. Rapid changes in economies, environmental conditions and social structures have required that many Asia-Pacific forestry institutions transform themselves to meet new priorities and shifting demands. Increasing wealth, lower poverty rates and greater access to information have – together with demands for social equity – stimulated moves to promote more participatory and devolved forms of governance. At the same time, deterioration in the extent and quality of forest resources in some parts of the region has led to criticism and questioning of the roles, objectives and institutional cultures of many traditional state forestry agencies. Moves towards devolution, decentralization, increased participation and privatization have been common responses. A trend toward the separation of regulatory and strategic roles, from operational functions – enabling demarcation of clear spheres of responsibility, removing conflicts of interest and allowing agencies to focus on narrower sets of objectives – has also occurred in several countries.

8. Society's perceptions of the importance and roles of forests are undergoing a transformational change, globally and in the region. Much greater emphasis is being placed on the various ecological and social services provided by forests, public recognition of some of the ethical principles that guide and support forest stewardship, sustainable management and conservation is also increasing. Greater emphasis on environmental priorities are reflected in the ongoing expansion of protected area networks, strengthening of biodiversity conservation efforts, and increasing interest and development of mechanisms for payments for ecosystem services –

particularly for carbon sequestration, but also in relation to more diverse services, such as ecotourism, amenity values and watershed protection. Other manifestations of greater focus on environmental priorities include re-orientation of forest policies, structural changes in government organizations, and greater participation of civil society in forest conservation and management. Increasing environmental activism in many countries has paralleled increases in social activism related to forest management and access rights to natural resources. Throughout the region, demands for greater accountability in the way that forests are managed – and for a voice in forest management – are increasing.

9. Amidst the broad range of forestry issues, several have been accorded particular attention in Asia and the Pacific:

- i. Climate change has gained primacy in the forestry agenda and is playing a key role in shaping forest policies and strategies in the region (refer to FO:APFC/2010/6).
- ii. The global economic recession has had significant impacts on the forest sector; most apparent in industrial forestry production and trade, but also affecting many other aspects as wide-ranging as patterns of land-use, informal sectors, science and technology and institutional budgets.
- iii. Escalating fossil fuel prices generated substantial momentum for alternative energy sources, including forest-based bioenergy production. Several countries have invested in the establishment of bioenergy plantations, bio-diesel processing plants and significant bio-energy-based research and development. The emergence of wood pellets as a significant energy source offers substantial opportunities for several countries.
- iv. Forest Law Enforcement and Governance (FLEG) has been a focus of substantial attention in the region, particularly in the context of illegal logging and associated trade (refer to FO:APFC/2010/5).
- v. Forests' roles in poverty alleviation have maintained a significant profile through a wide range of initiatives, particularly in developing countries throughout the region. More recently, forestry has been seen as providing a vehicle for job creation and economic stimulus for some countries striving to recover from economic recession.
- vi. Important roles for forests and forestry in preventing or mitigating the effects of natural disasters – and in post-disaster rehabilitation – have been emphasized in the wake of several devastating natural disasters, including the tsunamis affecting coastal South and Southeast Asia and Pacific countries, bushfires in Australia, earthquakes in China and Pakistan, and floods and landslides in several countries.

10. Progress continues to be made in the development and implementation of a wide range of innovative tools and mechanisms designed to promote and support the drive towards sustainable forest management. These include national forest programmes; certification; codes of practice and voluntary guidelines for various aspects of forestry including plantation management, forest harvesting and fire management; reduced impact logging (RIL); criteria and indicators for sustainable forest management; compliance and voluntary carbon markets; and the use of direct incentives for sustainable forest management.

11. Commission delegates are encouraged to reflect on recent developments in the region, and are invited to briefly inform the Commission of new developments in their own countries that may be of particular significance and interest to other countries. Delegates may also consider opportunities for increased collaboration, and recommend collective action to advance progress toward sustainable forest management.