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October 2013

	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-FIFTH SESSION

Rotorua, New Zealand, 5-8 November 2013

STATE OF FORESTRY IN THE ASIA-PACIFIC REGION

SECRETARIAT NOTE

1. The Global Forest Resources Assessment 2010 (FRA 2010) estimates the total forest area in the Asia-Pacific[1] region to be 740 million hectares. This comprises 142 million hectares of primary forests, 478 million hectares of other naturally regenerated forests, and 120 million hectares of planted forests. On a per capita basis, Asia-Pacific region is the least forested region in the world. Uneven forest distribution means there are a number of countries and subregions where per capita forest area is far lower than the regional average, signifying the enormous pressure these forests must bear.

2. For the region overall, there has been a positive trend in net forest area, reversing an annual loss of over 0.7 million hectares of forests during 1990 to 2000 to an annual increase of 2.3 million hectares during 2000 to 2005. Recently – between 2005 and 2010 – the rate of increase in forest area has declined to just under 0.5 million hectares per year. The increase over the last decade is primarily due to large-scale afforestation in the People's Republic of China. In addition to China, forest area has increased in Bhutan, Fiji, India, the Philippines, Sri Lanka, Thailand and Viet Nam, where increased investments in national reforestation programs have been observed. If gains in these countries are excluded, deforestation elsewhere remains high. Major areas of forest loss are evident in Southeast Asia, particularly in Indonesia and Myanmar.

3. Notwithstanding the positive trend in forest area at the aggregate level, forest degradation and declining health and vitality remain the hidden problems confronting Asia-Pacific forests. The definition of forests as areas with at least 10 percent canopy cover fails to capture the extent and severity of degradation. Growing stock per hectare continues to decline in several countries. Fire – most of which is human-induced – and uncontrolled logging remain major factors contributing to degradation in many countries.

4. Despite a wide range of supporting initiatives and much discussion, implementation of sustainable forest management continues to be a challenge. Undefined or overlapping property rights, weak governance and high demand for wood and non wood products have led to high levels of

[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.

unsustainable logging. Agricultural, industrial and urban encroachment remains problems in many areas and excessive pressures on forest resources are causing extensive degradation. There are very few instances of balanced approaches where various forest management objectives are integrated and clear trade-offs established between divergent goals. At the same time, more wood is produced from plantations and trees outside forests and dependence on natural forests as a source of wood supply is on the decline. Catastrophic environmental problems – especially floods and landslides – have often led to radical responses, logging bans in particular. Although generally reducing deforestation rates in the country of origin, logging bans have often had perverse effects, including the displacement of deforestation to other countries and the undermining of forest values. Without sound accompanying measures to satiate wood demand and effective enforcement measures, logging bans have generally been ineffective in stemming deforestation and degradation.

5. Production of industrial roundwood in the region has remained stable during the past 20 years, remaining within the range of 300 million m^3 to 335 million m^3 throughout the period. The Asia-Pacific region is a significant net importer of industrial roundwood. Imports of industrial roundwood into Asia-Pacific countries in 2012 totalled 62.7 million m^3, while exports of industrial roundwood from Asia-Pacific countries totalled 27.7 million m^3. China is by far the largest importer of industrial roundwood with 46.4 million m^3 imported in 2012 followed by India which has emerged as one of the world's top importers of industrial roundwood in recent years (8 million m^3 imported in 2012). In several countries there has been a significant decline in wood production either because of exhaustion of forest resources or due to increasing concern about environmental protection. One of the steepest declines in production has been in Japan where cheaper imports have made domestic production largely uneconomical, although significant efforts have been made in Japan to revitalize domestic forest management in recent years. Oceania is the only subregion that has registered a significant increase in industrial roundwood production, largely accounted for by Australia and New Zealand.

6. Production and consumption of sawnwood in the Asia-Pacific region have fluctuated erratically since 1980 and available statistics indicate a slight production increase from about 100.6 million m^3 in 1980 to 115.2 million m^3 in 2012. In contrast, production of wood-based panels and paper and paperboard has grown strongly in the Asia-Pacific region during the recent decades. Wood-based panel production increased from about 20.2 million m^3 in 1980 to over 162.2 million m^3 in 2012 with China accounting for most of this increase. Paper and paper board production also increased rapidly during the last three decades, increasing from about 31.8 million tonnes in 1980 to 185.6 million tonnes in 2012. China, Japan and Indonesia were among the global top five paper and paper board producing countries in 2012. Investments in new capacity have continued until recently, suggesting continued growth in production.

7. One of the major changes 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. In particular, the Asia-Pacific region, led by China and Viet Nam, has emerged a major producer and exporter of wooden furniture during the last two decades.

8. Larger societal changes have found profound impacts on forests in the region. A host of factors outside the forestry sector – demography, economy, political and institutional conditions and technological progress – collectively affect forests and forestry. Many developing countries in the region are on high population and economic growth paths and much of the growth is in countries where population densities are already very high. Rapid economic growth in countries such as China and India is bringing about fundamental changes in production, consumption and trade of all forest products and services. Although this rapid growth has led to significant reductions in poverty, high levels of poverty persist in many countries. Widening disparities, especially between rural and urban areas, have also emerged as a challenge. The trickling down of benefits has been extremely slow. However, international migration and associated flow of remittances are having an impact on land use in the region. Remittances have been a major source of income to many families, reducing the pressure and dependency on natural resources.

9. Asia-Pacific countries are witnessing major shifts in the overall policy and institutional environment. Notable trends include greater demands for social justice and participation in governance and in public policy decision-making, increased plurality and wider involvement of civil society and private sector organizations, and devolution of resource management responsibilities to local levels. Forest policies in the Asia-Pacific region have also 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, especially in the context of climate change mitigation and adaptation. 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; emphasis on increased involvement of stakeholders in forest management; and focus on potential contributions of forestry to emerging "green economy" approaches.

10. The role of forests and forestry in climate change mitigation continue to receive significant attention in the region. Recent developments in this area include: sustained REDD+ readiness efforts; increased investment in fundamental forestry data needs such as forest assessment and monitoring; greater emphasis on governance and participatory processes; and efforts to tap into voluntary carbon markets to fund reforestation and sustainable forest management. Another emerging trend is the greater emphasis being placed on the adaptation benefits of forests and forestry, especially in building livelihood resilience in rural communities.

11. 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; 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 including REDD+; Forest Law Enforcement, Governance and Trade (FLEGT) Voluntary Partnership Agreements (VPAs); chain-of-custody verification; and the use of direct incentives for sustainable forest management including payment for environmental services (PES). As part of FRA 2015, some 104 countries are participating for the first time in the Collaborative Forest Resources Questionnaire which is simplifying global forest reporting covering 88% of the world's forest area.

Points for consideration

12. 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.