

*Private forestry in Europe
– an overview*

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1. Private forestry in the EU

- 60% of EU 15 forests are owned and managed by families – generation bridging management and experience
- 36% estimated share of private forestry in CEEC
- Small scale forest holdings (average size: EU15=5 ha; CEEC= 2 ha)
- 15 million family forest owners (EU 25)
- Multifunctional forest management balancing economic, social, ecological and cultural requirements respecting the diversity across Europe
- Local ownership, contributing to economic and social sustainability of communities

1. FBI in the EU

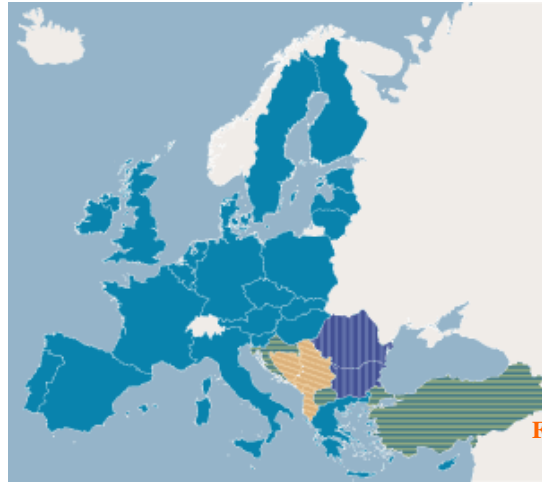
The importance of FBI for the EU in figures

Private Forest Owners	16 Million forests owners – owning more than the half of EU's forests
GDP	9 % of manufacturing sector
Employment FBI	3,7 Million
Turnover FBI	450 Billion Euros
CO ₂ storage	One spruce stores 1,6 t CO₂ in its life
Clean water	80 % of our water is cleaned by forest

- EU's rural development regulation (CAP)
- EU's energy policy
- EU's environmental regulation

2. Private forestry in the EU / Enlargement

EU Enlargement



- Estonia**
- Latvia**
- Lithuania**
- Poland**
- Czech Rep.**
- Slovakia**
- Hungary**
- Slovenia**
- Bulgaria**
- Romania**
- FYR of Macedonia**
- Croatia**
- Turkey**

2. Forest land data of EU 10 + applicant countries

	Total area	Total Forest	Forests' share	Public	Private
<i>Country</i>	<i>1000 ha</i>	<i>1000 ha</i>	<i>%</i>	<i>%</i>	<i>%</i>
Bulgaria*	11,098	3,902	35	85	15
Czech Republic	7,887	2,630	33	84	16
Estonia	4,523	2,156	48	91	9
Hungary	9,303	1,873	20	59	41
Latvia	6,459	2,995	46	56	44
Lithuania	6,530	2,119	32	71	29
Poland	31,268	9,088	29	83	17
Romania	23,839	6,301	26	79	21
Slovakia	4,903	2,038	42	51	49
Slovenia	2,027	1,194	59	29	71
Cyprus	925	386	42	40	60
Malta	32	0.3	1	100	0
Croatia	5,682	2,500	44	80	20
FYR of Macedonia	2,571	966	37.5	90	10
Total	108,794	34,682	32	79	21

2. Changes of forestry sector in the EU

- Forest area: increased by $\frac{1}{4}$ (136 → 171 mill. ha)
- Timber production forests: increased by 30 % (95→125 mill. ha)
- Changes in property conditions – share of common property forms of forests increased by $\frac{1}{2}$ (56 → 83 mill. ha)
- Number of forest owners increased by $\frac{1}{4}$ (12→16 million)
- Available wood for processing: increased by min. $\frac{1}{4}$
- Protected forests: important increase in area and diversity
- Further shifting of some production capacity of FBI to new members?
- The enlargement has increased the socio-economic and environmental importance of the forestry sector in the EU

2. Private forestry sector in EU

Problems

- Millions of forest owners emerged in last 10 years
- Small scale forest property dominates (> 5 ha)
- Often no owner interest in small scale forest management + privatisation process still in progress
high share of private forests not managed
- Low financial and investment level in private forestry sector generally
- Interest representation of PFO is not yet effective (problems of human capacity and infrastructure, financial means, organisational degree, no national level representation)
- **Low/not satisfactory recognition of PF sector in national policy setting (forestry, rural development, environmental policy)**
- Changes of state forestry administration's role – planning, supervision, extension strong dominance

**2. Private
forestry sector
in EU 10**

Achievements

- National associations in place (Baltics, Cz, Sk, H, Bu, Sl, Ro)
- International organisations active in PF (FAO, IUCN, PEFC, FSC, MCPFE....etc.)
- With EU membership new financial sources got accessible depending on national priorities
- New forest policy processes offer a chance to get involved in framework setting – NFP processes
- NPFOA are integrated into CEPF's work at EU level
- CEPF has a special work programme designed for CEEC
 - Policy advice to PFOAs
 - Certification
 - PFO Networking and exchange within Europe
 - Capacity building and information assistance

**3. Advantages
of PFOAs**

Purpose of association:

Management or representing interests ?

External and internal **COLLABORATION**

- being **PARTNER** in...
 - project, single activity
 - Political activity – **REPRESENTING INTERESTS**
- **LOBBYING** for targeted achievements

Example: CEPF

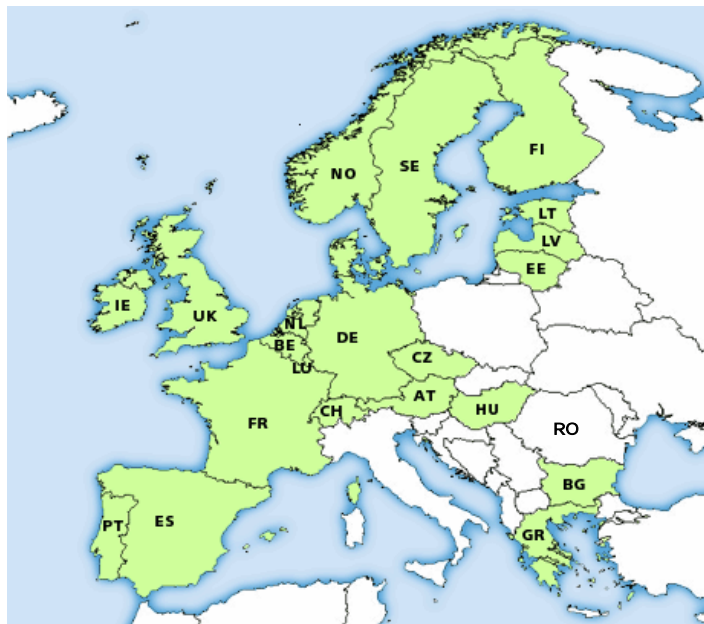
- furthers collaboration
- represent interests: members and the sector
- lobby for commonly defined objectives

4. On CEPF

CEPF – the umbrella organisation of family forestry in Europe

- Founded in 1996
- Current membership of 23 national forest owner associations from Europe
- Represents in the interests and provides the expertise of family forest owners vis-à-vis the European Institutions (in particular the European Commission, the European Parliament, the Economic and Social Committee)
- Active participation in international and global forest policy fora (e.g. MCPFE, UNFF, UNFCCC, WSSD, CEPF – focal point for the Major group “Small forest owners” in UNFF, IFFA - International family forestry alliance)

4. On CEPF



4. On CEPF

Vision

Being the heart and representative of family forestry in Europe enhancing the values of private property through sustainable forest management

Mission

Assist and strengthen national forest owners' organisations in Europe to maintain and enhance an economical viable, social beneficial, cultural valuable and ecological responsible sustainable forest management

4. On CEPF

Core activities of CEPF

Member in different Commission Advisory Committees (Forestry & Cork, Rural Development, Forest Based Industry)

- Lobbying different European Institutions

- e.g. DG Agriculture, Environment, Enterprise, Trade,
- e.g. EU Parliament (contact to MEP's)

- Internal Working Groups

- Forestry policy/ rural development
- Climate Change
- Communication

- External Working Groups

- Wood Chain core group: **CEPF**, **CEI-Bois** (Woodworking industries)+ **CEPI** (Pulp and Paper Industries)
- Natura 2000 users forum
- Enhanced Use of Wood

4. On CEPF

CEPF's role in CEEC

- member organisations (Cz, Est, Hun, Lat, Lit, Slo, Rom)
- project level co-operations : FAO/IUCN/CEPF

<http://www.fao.org/forestry/site/12508/en>

- promotion and strengthening of PFOAs
 - *Capacity building on forest related EU policies*
 - *Exchange between old and new CEPF members*
 - *Network activities: private forestry in CEEC*
 - *Involvement of the new members into the EU forest related policy formulation processes*

4. How can CEPF help

CEPF's plan of activities in CEEC, 2005-2006

- Assistance in establishing new national/regional level organisations of representing the interests of private forest owners and the private forestry sector (e.g. Poland?, Croatia?, FYR Macedonia)
- Common activities with FAO SEUR/IUCN
- EU accession countries: capacity building on EU forestry related regulation (HR, Bul, Rom)
- **Support PEFC certification in CEEC (Svk, Pol, Hun)**

4. How can CEPF help

- EU countries forestry related EU policies/measures are of outstanding importance to PFOs
- Partnership and collaboration among PFOAs
- Not-EU related international activities:
 - *Projects (FAO-IUCN-CEPF)*
 - *Certification – PEFC*
 - *Capacity building activities*

Forest owners of the region are welcome !

Possible forms of collaboration:

- project involvement
- observer status to CEPF events
- membership in CEPF

Primarily requirement for membership in CEPF:

the establishment of a national level association representing the country's private forest owners to the best possible extent.

5. Summary

- **High demand for coordination of forestry related issues within the Comm services and the MS, civil society**
- EU with bigger resources and markets – EU as producer & exporteur (e.g. paper, panels...etc.), consumer
- Changed property conditions in the EU indicate also new needs in regulation (state-private, PFOA, capacity building)
- Privatisation remains still an issue in some CEEC
- In private forestry problems are to be divided at **technical, policy and organisational level**
- Increased need for cooperation of concerned private organisations and for capacity building
- Increased need for state administrations to cooperate with private sector organisations in policy setting (owner org., industry org., NGOs)

5. Summary

- Private forestry sector in the EU plays a considerable role within the agrarian and rural development policy domain in general and the forest land use related fields in particular.
- There is a growing need and political recognition for an enhanced coordination of the presently fragmented responsibilities of EU institutions and applied measures influencing the forest land use.
- Associations are essential in furthering and enabling collaboration of similarly interested people to become actors in the concerned field. Actors represent interests and lobby for targeted achievements.
- CEPF is the primary actor representing family forestry in the EU political arena. Further CEPF is the main platform of collaboration within the private forestry sector in whole Europe. CEPF has a special activity plan directed to CEEC and through collaboration with FAO to Central and Eastern Europe.
- **Private forest owners of the region are welcome !**

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