

Regional outlook

Changes in society, which have accelerated in recent decades with the rapid growth in information and communication technologies and globalization, are bringing about important changes in the forest sector at all levels. Demographic, economic, institutional and technological changes have altered the pattern of demand for forest products and services.

Considering the long-term nature of forestry, a better understanding of the potential directions of change is crucial to developing appropriate priorities and strategies for the future of the sector. In particular, the growing interaction of societies through globalization compels forestry professionals to acquire a broader perspective beyond national borders.

Part 1 has been developed largely based on ongoing and completed regional forest sector outlook studies. For each region, the drivers of change external to the forest sector are first examined in the areas of demographics, economy, policies and institutions, and science and technology. All demographic data are from World Urbanization Prospects: The 2007 Revision Population Database (UN, 2008a). All gross domestic product (GDP) and value-added figures are in 2006 constant United States dollars.

For each region, there is a section outlining an overall scenario of societal changes that can be expected up to 2030. Taking the predicted changes and previous trends into account, the future for the forest sector is then projected, tracing developments in:

- forest area, based – unless otherwise noted – on statistics from the Global Forest Resources Assessment 2005 (FAO, 2006a);

- forest management, addressing both natural and planted forests;
- wood products (production, consumption and trade), with projections based on econometric modelling, taking into particular account the changes in population, income and other parameters that influence demand;
- woodfuel, looking at both traditional woodfuel (fuelwood and charcoal) and modern biofuels, including the “wild card” of eventual commercial production of cellulosic biofuel;
- non-wood forest products (NWFPs), identifying broad patterns only, as the diversity of NWFPs in all regions makes it extremely difficult to provide a comprehensive outlook;
- environmental services of forests, including biodiversity conservation, climate change mitigation, protection against desertification and land degradation, watershed services and nature tourism. Protected areas are given as a rough indicator of conservation status; as recent reliable statistics do not exist by country for forest protected areas, figures are given for terrestrial protected areas (which include but are not limited to forests).

The aim has been to capture the main trends despite diversity within and among regions and countries which made the task a great challenge. An effort has also been made to provide a balanced perspective between short-lived changes, which usually capture most of the attention, and the less perceptible long-term changes, which are often neglected.