



Food and Agriculture
Organization of the
United Nations

ADVISORY COMMITTEE
ON SUSTAINABLE
FOREST-BASED
INDUSTRIES (ACFSI)

Advisory Committee on Sustainable Forest-based Industries (ACFSI)

61st Annual Meeting

Meeting Minutes

31st March 2020



Attendees

| Members | |
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| Name | Affiliation |
| Kwame Asamoah Adam | Ghana Timber Millers Association, Chief Executive Officer, Ghana |
| Ferhat Naci Güngör | Alim Grup, Director, Turkey |
| Timo Jaatinen | Finnish Forest Industries Federation, Director General, Finland |
| Paul-Antoine Lacour | Union Française des Industries des Cartons, Papiers et Celluloses (COPACEL), Directeur-Général, France |
| Andrew Large | Confederation of Paper Industries, Director-General, United Kingdom |
| Shobhan Mittal | Greenply Industries, President, India |
| Tsunehiro Ogawa | Japan Paper Association, President, Japan |
| David Rhodes | New Zealand Forest Owners Association, Chief Executive Officer, New Zealand |
| Wu Shengfu | China Wood Culture Association, President, China |
| Klaus Windhagen | German Pulp and Paper Association (VDP), Director-General, Germany |
| Steering Committee | |
| Carina Hakansson (Chair) | Swedish Forest Industries Federation, Director General, Sweden |
| Ross Hampton (Vice Chair) | Australian FPs Association, Chief Executive Officer, Australia |
| José Carlos da Fonseca Junior | Brazilian Tree Industry (IBA), Institutional Director, Brazil |
| Jane Molony | Paper Manufacturers Association, Executive Director, South Africa |
| Derek Nighbor | Forest Products Association of Canada, Chief Executive Officer, Canada |
| Lorenz Freiherr Klein von Wisenberg | International Family Forest Alliance, Germany |
| FAO | |
| Sven Walter (Secretary) | Team Leader, Forest Products and Statistics, Forestry Department |
| Lyndall Bull (Rapporteur) | Forestry Officer, Forest Products and Statistics, Forestry Department |
| Mette Wilkie | Director, Forestry Department |
| Francesca Bertola | Consultant Forest, Products and Statistics, Forestry Department |
| Pierre Bouillon | Expert on Wood Products, Forest Products and Statistics, Forestry Department |
| Michela Mancurti | Programme Assistant, Forest Products and Statistics, Forestry Department |
| Arvydas Lebedys | Forestry Officer, Forest Products and Statistics officer, Forestry Department |
| Ashley Steel | Forestry Officer, Forest Products and Statistics officer, Forestry Department |
| Observers | |
| Heidi Brock | American Forest and Paper Association, President and Chief Executive, United States of America |

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| Giulia Fadini | Confederation of European Paper Industries, Innovative Projects Manager, Belgium |
| Nathalia Granato | Brazilian Tree Industry (IBA) Sustainability and Forest Affairs Coordinator, Brazil |
| Jake Handelsman | Senior Director, International Trade at American Forest & Paper Association, United States of America |
| Tomoaki Kimura | Japan Paper Association, Assistant to the President, Japan |
| Renata Negrelly Nogueira | Alternate Permanent Representative of Brazil to FAO, WFP and IFAD, Italy |
| Luis Rocharte | Forest Solutions Group, World Business Council for Sustainable Development, Director, Switzerland |
| Agnes Seah | Malaysian Timber Council, Europe Regional Head Malaysia |
| Olman Serrano | Association Technique Internationale des Bois Tropicaux, ATIBT, President, France |
| External presenters | |
| Ed Pepke | Senior Timber Trade and Policy Analyst Dovetail Partners, United States of America |
| Katie Fernholz | Executive Director – Dovetail Partners, Inc., United States of America |
| Hans Verkerk | Principal Scientist, Bioeconomy Programme, European Forest Institute, Finland |
| Mariana Hasegawa | Researcher, Bioeconomy Programme, European Forest Institute, Finland |
| Apologies (ACFSI members) | |
| Mr Bernard de Galembert | Independent Forestry and Bioeconomy Expert, Belgium |
| Sr José Urtubey | Grupo Tapebicuá, Director, Argentina |
| Boris Zingarevich | Russian National Pulp and Paper Association (RAO Bumprom), Vice President, Russian Federation |



Agenda

| Items | Presenter |
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| 1. Welcome & overview of the meeting | Chair Ms Carina Hakansson |
| 2. Message from the Director of FAO Forestry Policy and Resources Division | Ms Mette Wilkie |
| 3. Update from the ACSFI Secretariat | ACSF Secretary Mr Sven Walter |
| 4. Presentation and strategic discussion: ACSFI Strategic Framework 2020 - 2030 | Dovetail Partners Inc |
| 5. Break | |
| 6. Strategic discussion: Actions for substitution with forest renewables to contribute to the SDGs. Project Foresight | European Forest Institute |
| 7. Proposed ACSFI key messages to COFO 25 | Chair |
| 8. Location of the next two ACSFI sessions | Chair |
| 9. Arrangements for June 2020 meeting in Rome | ACSF Secretary |
| 10. Any other business | Chair |
| 11. Meeting Close | |



Agenda Item 1 Welcome & overview of the meeting

Discussion:

The Chair, Ms Carina Hakansson opened the meeting at 12pm Central European Time.

The Chair welcomed members, observers and presenters to the 61st Meeting of the ACSFI. The Chair acknowledged that while it would have been preferable to meet in person in Rome, she was grateful for everyone to join online particularly given the range of times from the various locations around the world.

As the world grapples with managing the outbreak of COVID-19, the Chair recognized the wide range of products that the forest product sector offers in addition to traditional paper and building products. This includes hygiene and sanitary products, biomass for heating, ethanol, respirator paper and packaging for parcels.

A request for Any Other Business items to be raised in Item 9 was made. No requests were made.

The ACSFI Secretary, Mr Sven Walter, provided instruction on the approach to managing participation in the online meeting. He also welcomed three new members to the Committee since the last ACSFI meeting:

Mr José Carlos Fonseca Júnior Institutional Director, Brazilian Tree Industry (IBA), Brazil

Mr Andrew Large Director-General, Confederation of Paper Industries, United Kingdom

Mr Tsunehiro Ogawa President, Japan Paper Association, Japan

Mr Fonseca Junior is also welcomed as a new member of the ACSFI Steering Committee.

Mr Derek Nighbor, Chair of the International Council of Forest and Paper Associations (ICFPA), informed the Committee that the ICFPA is compiling a repository of information outlining how the forest industry is responding to the situation associated with the COVID-19 outbreak in different jurisdictions around the world. Mr Nighbor offered to share that information with the ACSFI Secretariat.

Agenda Item 2 Message from the Director of FAO Forestry Policy and Resources Division

Discussion:

The Chair welcomed Ms Mette Wilkie, Director of FAO's Forestry Policy and Resources Division. Ms Wilkie gave a warm welcome to the participants and provided an overview of FAO's priorities which are centered around three areas of work:

- **Halting Deforestation and Degradation:**
 - At the end of 2019, FAO was asked by the United Nations to work with the United Nations Environment Program (UNEP) to develop a coordinated approach across the United Nations system to tackle this challenge. Cooperation is sought with the members of the Collaborative Partnership on Forests (CPF) addressing cross-sectoral issues bearing in mind that agriculture is a main driver for deforestation.

- **Restoration:**
 - The United Nations has declared 2021 – 2030 as the United Nations Decade on Ecosystem Restoration. FAO and UNEP have been declared the lead agencies for the implementation of the Decade. More information and the draft Strategy can be found at: <https://www.decadeonrestoration.org/>.
- **Sustainable Use of Forest and Forest Products:**
 - Includes discussion on mainstreaming biodiversity in the production of forest and forest products and increasing efforts to mitigate climate change.

The FAO Forestry Department will launch two major publications in 2020. These are:

- **2020 Global Forest Resources Assessment:**
 - Main findings will be launched on May 7 2020, the full report will be made available on 22 June 2020. More information can be found at: <http://www.fao.org/forest-resources-assessment/en/>
- **2020 State of the World’s Forests Report**
 - This year’s report will focus on forests, biodiversity and people
 - Due to be launched on 22 May 2020 which is the International Day of Biodiversity
 - Will be presented at COFO 2020

The FAO Forestry Department continues to work to increase and improve opportunities for partnerships with the private sector. The Department already works closely with the private sector through this Committee and the flagship programs of Reducing Emissions from Deforestation and forest Degradation + (REDD+, <http://www.fao.org/redd/en/>), Forest Law Enforcement, Governance and Trade (FLEGT, <http://www.fao.org/in-action/eu-fao-flegt-programme/en/>) and the Forests and Farm Facility (<http://www.fao.org/forest-farm-facility/en/>). The Forestry Department is particularly focused on how to best work with the private sector to achieve the SDGs.

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| Agenda Item 3 | Update from the ACSFI Secretariat |
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Discussion:

The ACSFI Secretary, Mr Sven Walter opened his briefing by welcoming members to the meeting and introducing the team that supports the Secretariat: Dr Lyndall Bull, Ms Francesca Bertola and Ms Michela Mancurti.

The Secretary provided an update on the following items:

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| Governance | The governance system has been streamlined. Activities have included distribution of Rules of Procedure, streamlining of internal communication procedures, updated membership and delivery of two steering committee meetings |
| Outreach | Outreach activities have increased and include development of the ACSFI “At a Glance” brochure and distribution of ACSFI Bulletin |
| Delivery of ACSFI Reports | <ol style="list-style-type: none"> 1. Building sustainable forest- based value chains: lessons-learned from inspiring stories all over the world 2. Carbon mitigation potential from harvested wood products 3. Status of public policies encouraging wood use in construction – an overview |

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| | <p>A proposal was made and accepted by the Committee for delivery of a webinars on the latter two reports.</p> |
| <p>Outline of ACSFI Work Plan</p> | <p>An ACSFI work plan has been prepared to facilitate targeted implementation and monitoring. It seeks to be consistent with FAO priorities for biennium 2020-2021 and the ACSFI Strategic Framework 2020 – 2030, provide clear priorities, outputs and outcomes and catalyse partnerships for the benefits of ACSFI members and FAO (and other stakeholders).</p> <p>The briefing provided an overview of key elements of the work plan, i.e.:</p> <ul style="list-style-type: none"> ○ Core events ○ Innovative forest product value chains ○ ACSFI Strategic Framework ○ Forest Renewables – High carbon substitutes ○ Restoring ecosystems – enhancing productive landscapes <p>The Committee responded positively to the proposed work plan.</p> |
| <p>FAO’s Strategic Objectives and Main Clusters of FAO’s Forestry Department</p> | <p>FAO’s Strategic Objectives were described. This was complemented by a description of the four clusters of the FAO Forestry Department. The presentation included information about the main achievements and priorities of the teams (outlined below) and highlighted opportunities for engagement with ACSFI and its members:</p> <p>FAO’s Forestry Department Clusters are:</p> <ol style="list-style-type: none"> 1. Climate Change and Resilience, Global Forest Resources Assessment, Forest Resources Management 2. Forest Governance and Economics, Forest Products and Statistics, FLEGT, Water and Mountains 3. REDD+ and National Forest Monitoring 4. Forest and Farm Facility and Social Forestry |

Comments and suggestions on this item from members included:

- Overview provided a clear picture of FAO priorities related to sustainable forest managements and the ACSFI
- Could be useful and interesting to have a discussion as a group on COVID-19
- Important to ensure that the ACSFI’s work continues to consider and develop a relationship with the major forest certification schemes
- Support to, and collaboration with, other UN bodies such as the United Nations Forum on Forests is important

Item 3 Decision Items

The Committee supported the proposed ACSFI Work Plan

Item 3 Action items

Delivery of webinars in 2020 on:

- Carbon mitigation potential from harvested wood products
- Status of public policies encouraging wood use in construction – an overview

Agenda Item 4 Presentation and Strategic Discussion: ACSFI Strategic Framework 2020 - 2030

Mr Ed Pepke and Ms Katie Fernholz of Dovetail Partners Inc, presented the ACSFI Strategic Review & Framework. Their presentation provided an update of the Project’s purpose, methodology and findings to date including on the ACSFI’s:

- Purpose and aims
- Governance and process
- Past outputs and initiatives
- Opportunities for collaboration with other FAO bodies
- SWOT analysis
- Opportunities for partnership between FAO and the private sector

Dovetail presented the following five preliminary findings and 11 preliminary recommendations:

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| <p>Finding 1: The governance system of the ACSFI is satisfactory and facilitates the work of the Committee effectively.</p> | <ul style="list-style-type: none"> • Recommendation 1.1: ACSFI should increase its outreach activities to engage in strategic partnerships. • Recommendation 1.2: ACSFI should broaden its membership to include additional parts of the forest sector and wider geographical coverage. • Recommendation 1.3: The ACSFI should guide its activities based on a Strategic Framework 2020-2030, defining its short, medium and longer term priorities. |
| <p>Finding 2: The ACSFI provides unique opportunities for building and strengthening strategic external partnerships with stakeholders and internal cooperation within FAO.</p> | <ul style="list-style-type: none"> • Recommendation 2.1: ACSFI to engage in strategic partnerships with external stakeholders conducive to achieve its vision and strategic goals. • Recommendation 2.2: ACSFI secretariat to engage with relevant FAO bodies, programmes and initiatives to facilitate joint action to achieve the vision and strategic goals of the Committee. |
| <p>Finding 3: The ACSFI stakeholders expressed a heterogeneous interest in priority topics to be covered by the Committee.</p> | <ul style="list-style-type: none"> • Recommendation 3.1: ACSFI should continue to provide a platform for information sharing of the main SFM achievements of FAO. And should identify priority themes to be addressed in the medium term, which are of major relevance for both FAO and ACSFI members. • Recommendation 3.2: Secretariat to define criteria guiding the selection of priority themes including expressed interest of FAO Senior Management and ACSFI members, relevant to achieve the medium-term goal of the ACSFI, relevant to contribute to the |

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| | <p>achievement of the UN SDGs, opportunities for strategic partnership building, and opportunities for catalysing impact on the ground.</p> <ul style="list-style-type: none"> • Recommendation 3.3: To respect FAO’s biannual work planning, the ACSFI should review its medium-term priorities every odd year (second year of the FAO biennium) and its short-term priority outputs every even year (first year of the FAO biennium). |
| <p>Finding 4: Approximately 50% of the respondents to the survey perceive positive impacts of the ACSFI initiatives to FAO and to members’ constituencies.</p> | <ul style="list-style-type: none"> • Recommendation 4.1: The ACSFI should plan outputs’ areas of impact and then regularly monitor those impacts. • Recommendation 4.2: The ACSFI to further define its areas of expected impact, such as related to the targets of the SDGs and the UN Global Forest Goal 2. |
| <p>Finding 5: The ACSFI stakeholders are well aware of the outputs delivered by the Committee.</p> | <ul style="list-style-type: none"> • Recommendation 5.1: ACSFI outputs should focus on priority topics to be addressed in the medium term (4 years), normally including a scoping study and outputs related to opportunities that have the potential to catalyse impact through partnerships, advocacy, capacity building and policies. |

The presentation also provided an outline the following draft elements of the Strategic Framework 2020-2030.

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| <p>Purpose of the ACSFI</p> | <p>Provide a forum for dialogue between FAO and the private sector to enhance the understanding of emerging opportunities and to identify and stimulate strategic actions by FAO, the private sector and other stakeholders that promote sustainable consumption and production patterns related to forest products.</p> |
| <p>Periodicity</p> | <p>Longer term (10 years until 2030). Strategic goal 2030 of the ACSFI: Over the next decade, the ACSFI will advise FAO in its work towards the achievements of the UN Strategic Development Goals by catalysing innovative forest-related actions through partnerships between FAO, the private sector and other stakeholders.</p> <p>Medium term (4 years until 2025). Expected outcome 2024 of the ACSFI: Strategic actions identified and partnerships facilitated to promote a circular forest-based bioeconomy and healthy and productive ecosystems.</p> <p>Short term (2 years: 2020-2021). Work Plan clearly identifies ACSFI’s outputs and activities</p> |
| <p>Monitoring the Framework</p> | <p>Yearly review of the Strategic Framework by the Steering Committee</p> <p>External mid-term review of the ACSFI Strategic Framework in 2024/25</p> |

Finally, Dovetail provided an overview of the proposed structure of the Strategic Plan.



Comments and suggestions on this item from members included:

- Ensuring that the focus of the ACSFI is global in its nature. It could include a focus on the role of the forest sector in poverty reduction
- The focus of the Committee should be on the long term
- The discussion did not include mention of the importance of public perceptions of forest industries and the forest sector
- The ACSFI has evolved from what was originally a committee focused on the pulp and paper sector. As we diversify the membership it will be important to ensure we focus on topics that can be considered as common denominator and are truly global and common issues for all members e.g. biodiversity, climate change, innovation etc

Item 4 Decision Items

The Committee endorsed the key elements of the ACSFI Strategic Framework 2020-2030.

Item 4 Action items

A webinar on the Strategic Review as the project nears completion

Agenda Item 5 Strategic Discussion: Actions for substitution with forest renewables to contribute to the SDGs: Initiative Foresight

Discussion:

Mr Hans Verkerk, with support from Ms Mariana Hasegawa from the European Forest Institute (EFI) presented an overview of the initiative FORESIGHT: Forest renewables replacing fossil-based and GHG-intensive products. The initiative consists of the following elements:

1. Assessment of forest-based substitutes for their environmental contributions
2. Forest products and the bioeconomy
3. Identify and describe a range of forest-based substitutes and provide a detailed update on emerging and potential forest-based products
4. Development of final report
5. Organize awareness raising event

EFI posed the following questions to the Committee:

- What are the forest industries' strategies to warrant forest product sustainability and ensure circularity of novel forest products?
- What are potential risk factors associated with the use of forest products in a bioeconomy that can provide reasons for caution or new insights?
- What would be novel forest products providing substitution benefits that could be explored in the project

Committee members expressed strong support and interest in the initiative. A wide range of comments and questions were raised. The themes of the questions and comments included:



- Concerns about the use of life cycle analysis reports with questionable legitimacy
- Concerns about the impact of the economic downturn and consequent downward pressure on oil prices. This, in turn could have an impact on the support for the continued development of the bioeconomy and associated R&D related to forest product substitution
- The approach to measuring GHG emissions of various materials is of critical importance
- Strong support for the initiative including a call for the sector to collaborate on the topic with various organizations (e.g. CEPI) undertaking complementary studies and work
- The need to ensure that appropriate policy responses are developed to support the sustainable substitution of forest products for GHG intensive products
- Building with wood is important but it is only one part of forest-based industries. An integrated approach is required and other non-wood products should also be considered as substitutes such as packaging, textiles etc
- It is important that the recommendations in the report take into account the rulings of the Intergovernmental Panel on Climate Change (IPCC)
- The report should recognize and respond to the concerns of NGOs with regard to the increased use of forest products
- Request for the recognition of the role that healthy markets play to keep forests healthy
- Concerns about the secondary effects of substitution. If some plastic products can be substituted for fibre based products, that will act to reduce oil demand and in turn support the decarbonisation of transport by making oil extraction less profitable. A suggestion for the research was made, to take these second order effects into account
- Many members offered thanks for the great job and highlighted how this project is an example of the value that ACSFI add to FAO and its members

Item 5 Action items

A webinar on the FORESIGHT initiative to be developed prior to the project's conclusion

Agenda Item 6 Proposed ACSFI Key Messages to COFO 25

Discussion:

The Chair provided an outline of the importance and role of COFO. She then presented the Key Messages recommended by the the ACSFI Steering Committee and proposed that the Committee review and approves them for inclusion in the ACSFI COFO report. The Key Messages approved by the Committee were:

- **recognizes** FAO's engagement to promote sustainable forest management and strengthen capacities of stakeholders to ensure sustainable consumption and production patterns related to forest products;
- **underlines** the commitment of the ACSFI to serve as an advisor and catalyzer promoting strategic partnerships between the private sector, FAO and other relevant stakeholders to support country efforts to achieve the SDGs;
- **calls upon** the private sector to fully engage with FAO and other stakeholders to promote transformational change and ensure sustainable consumption and production patterns related to forest products through joint action;



- **invites** FAO to support the private sector to i) continue providing up-to date-information on forest resources and the production and trade of forest products and ii) carry out capacity building initiatives to promote the sustainable production and consumption of and trade in forest products;
- **requests** the ACSFI Secretariat provided by FAO to continue facilitating the effective implementation and monitoring of the ACSFI Strategic Framework 2020-2030, including its biennial work plan 2020-21

Item 6 Decision Items

The Committee endorsed the Key Messages to take to COFO

Item 6 Action items

The ACSFI Secretariat to complete the draft COFO report for the ACSFI Chair's review and submission to the COFO Secretariat

Agenda Item 7 Proposed location of the next two ACSFI Sessions

Discussion:

The Chair outlined that the location of ACSFI meetings are typically set two years in advance in consultation with the ICFPA with every second year taking place in Rome.

The ACSFI Vice Chair, Ross Hampton has extended an invitation for the meeting to take place in Australia.

Item 7 Decision Items

The Committee endorsed the proposal for the 2021 ACSFI meeting to take place in Australia and the 2022 meeting to take place in Rome hosted by FAO.

Item 7 Action items

The ACSFI Secretariat to work with Vice Chair Ross Hampton and FAO colleagues to develop a schedule for the 2021 ACSFI meeting in Australia.



Agenda Item 8 Arrangements for June 2020 meeting in Rome

Discussion:

The ACSFI Secretary indicated that a decision on the arrangements for ACSFI and related meetings in June 2020 will be communicated to members by 30th April 2020.

Agenda Item 9 Any Other Business

Discussion:

Members were informed that the slides and photos from the meeting would be shared following the meetings. Members were asked to indicate if they were not comfortable if a photo that featured them was circulated.

Agenda Item 10 Meeting Close

The meeting closed at 3.06pm Central European Time.