

UNECE/FAO Workshop on
“Estimating Potential Sustainable Wood Supply”
30 March 2009
Conclusions and Recommendations

Conclusions

1. The political importance of the need for better information for assessing wood supply has been widely recognized and all countries are aware of the need for the best possible information on which to base policy. Several countries have carried out major studies, others have indicated ongoing efforts to fill data gaps; preliminary data are available, further results can be expected in the near future.
2. The workshop on 30 March 2009 reviewed the state of the art of national potential wood supply assessment. There are often significant differences among the studies. National studies on wood supply potential mostly focus on assessment of forest biomass via forest inventory methods.
3. The analysis of estimates of potential wood supply from the country statements to the thirtieth session of the Joint FAO/ECE Working Party on Forest Economics and Statistics showed that national studies mainly assess forest biomass, rather than the other elements of wood supply. The workshop concluded that in order to get a complete picture of potential wood supply, it is necessary to look at all sources of wood – not only the forest, but also industry and logging residues, recovered wood and trees outside the forest, as well as forest extension onto agricultural land.
4. Many wood supply studies are predominantly based on forest inventories, and thus only describe a theoretical wood supply potential. The theoretical potential has to be seen in the light of the socio-economic and techno-biological limitations which determine the limits of future wood supply. Examples of these limitations are forest owners' willingness to harvest, the economic viability of expanding harvests, infrastructure limitations, and risks to site productivity or to biodiversity
5. Furthermore, sources of wood supply other than forest removals, like woody biomass from outside the forest and post-consumer recovered wood, are relatively unknown but often play a crucial role in wood supply.
6. Because of the variation between approaches, it is difficult to construct a regional picture, which is a significant drawback as many of the policy instruments are designed at the regional (EU) level.
7. The study “Potential Sustainable Wood Supply” represents a progress in estimating potential wood supply in Europe, but needs to be reviewed and validated on a national level. A revised version of the study would lead to a largely improved estimation of European wood supply potential. Countries comments on the applicability of the approach and the feasibility of the assumptions and estimates on a national level are crucial; some comments have been

already received, all countries are encouraged to review the study and submit their comments. The secretariat should finalise the study taking account of these comments by summer 2009.

8. The participants agreed that, where there are no national estimates, especially for wood supply from outside the forest, the assumption from the UNECE/FAO study can be used as a plausible starting point, until better national data are available.

9. Good practice principles on wood supply studies (scope, terminology, appropriate methods) were developed during the workshop (see more under ‘Recommendations’).

10. In reaction to changes in natural resource, energy and environmental policies, the needs for statistics in the forest-wood chain are evolving rapidly. Thus, national statistical systems need to be adapted accordingly so as to be able to deliver timely, policy-relevant data as the basis for analyses. Appropriate adaptation may require changes in mandates, structures, networks and resources. Such challenges need considerable time, knowledge and collaborative efforts to be effectively addressed. The risk inherent in the present situation is that policies may be based on estimates of potential future wood supply which are too high or too low. There is a need for fundamental research: otherwise policies could be based on an aggregation of estimates without any sound basis.

11. It was suggested that the information provided from studies of potential supply is only one element needed in making overall policy decisions about sustainability.

12. The workshop welcomed the fact that a linked workshop in France in June 2009 would address the issue of wood mobilization using their own report as input and focusing on case studies.

Recommendations

1. Countries are encouraged to assess the potential sustainable supply of all sources of wood and inform the secretariat on the results.
2. As national wood supply studies are predominantly based on forest inventories, and thus only describe a theoretical wood supply potential, it is recommended that the theoretical potential has to be assessed towards socio-economic and techno-biological limitations of timber harvesting to crystallize “real availability”.
3. Countries are encouraged to present the results of their national studies in a harmonized way (e.g. by using the terms and concepts and units of the ECE/FAO study), so that regional comparisons and aggregations can be easier and more accurate.
4. Practitioners are encouraged to exchange experience with other bodies / institutions and with the forest-based industry, forest owners, NGOs and other stakeholders.

5. Good practice principles for studies of potential sustainable wood supply were developed and are at the disposal of countries on a voluntary basis in order to prepare future / adjust current studies of potential wood supply. The following principles were developed:

- a) Cover and define all elements of wood supply. If this is difficult, estimates should be provided,
- b) use existing international terms and definitions whenever possible, or provide conversion methods from national to international definitions,
- c) coordinate data research with experts in other bodies / disciplines and in the industry,
- d) provide a conversion from national data to an agreed international classification of types of wood supply, for example that used by ECE/FAO in its study on potential sustainable wood supply. Provide results in the standard unit m³ or oven-dried metric tons,
- e) be specific about how estimates were made and transmit national expansion and conversion factors to the secretariat,
- f) separately identify “bio-technical” and “socio-economic” potential, and state what assumptions underlie each, for instance on policy, technology, costs, demand/price, information, restructuring of holdings etc.,
- g) identify the sources of uncertainty concerning estimates of the amount that maybe sustainable, and
- h) apply different wood supply and demand scenarios to ensure sustainable forest management under shifting ecological and socio-economic conditions.

6. Parties are encouraged to make estimates which are consistent with all dimensions of sustainable development, including income, employment, ecological functions and climate change

7. A small group was asked to prepare recommendations for more detailed assessment guidelines.

8. Countries are encouraged to adapt their approach to the good practice principles in the interests of international comparability and to enable the creation of an overall regional picture.

9. Governments, industry and other national, European and international stakeholders should consider funding basic research into wood supply (household survey on use of wood for energy, trade in residues, trees outside the forest, flows of recovered wood, conversion factors etc. to improve the quality of the estimates of potential sustainable wood supply being prepared.

10. All countries are encouraged to review the study and submit their comments to the UNECE/FAO study. The secretariat should finalise the study taking account of these comments by summer 2009.

11. UNECE/FAO should continue to solicit information on national assessment estimates and facilitate exchange of experience.