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Economic Commission for Europe

Committee on Forests and the Forest Industry

Seventy-fourth session

Geneva, 18-20 October 2016

Item 1 of the provisional agenda

Adoption of the agenda

Annotated provisional agenda for the seventy-fourth session of the Committee on Forests and the Forest Industry

Session to be held in Geneva, Switzerland, from Tuesday, 18 October 2016, 10 a.m., until Thursday, 20 October 2016, 5.30 p.m. The session will be followed by a workshop on 21 October 2016 on measuring the value of forests in a green economy.

I. Provisional Agenda

1. Adoption of the agenda

2. Forest ownership and employment in the forest sector

- (a) Forest ownership in the region – preliminary results of the thematic study;
- (b) The forest sector workforce and future green jobs in the region – preliminary results of the study.

3. Forest products and markets

- (a) Forest products market discussions, including panel discussion: opportunities for and barriers to forest products from the perspective of the private sector;

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- (b) Trends and perspectives for selected forest products (pulp and paper, pallets and wooden packaging);
- (c) Wood construction in the region: what can forest industries do to help nurture a paradigm shift to using wood for green construction?

4. The global and regional policy context

- (a) The role of forests, their goods and services, and the forest sector in the implementation of the 2030 Agenda for Sustainable Development;
- (b) The United Nations Forum on Forests (UNFF) – the status of the 2017-2030 Strategic Plan;
- (c) Forest Europe - Programme of Work and possible synergies in the region;
- (d) Developments in other relevant organizations and processes.

5. Reporting on and implementation of the 2014-2017 Integrated Programme of Work and related decisions

- (a) Report of the ECE/FAO Working Party on Forest Statistics, Economics and Management;
- (b) Review of 2016 activities, and activities planned for 2017;
- (c) The ECE evaluation on the assessment of the relevance of the 2014-2017 Integrated Programme of Work (IPoW);
- (d) Strategic Review (SR) of the Integrated Programme of Work.

6. Election of officers

7. Date and place of the next session

8. Any other business

9. Adoption of the report

II. Annotations to the Provisional Agenda

1. Members of the FAO European Forestry Commission (EFC) are encouraged to attend the seventy-fourth session of the Committee, as most of the items in this session refer to the 2014-2017 IPoW for the Committee and the Commission.
2. For the timing of agenda items, please refer to the schedule on the last page of this document.

1. Adoption of the agenda

Documentation: ECE/TIM/2016/1

3. Delegates will be invited to adopt the provisional agenda of the meeting.

2. Forest ownership and employment in the forest sector

(a) Forest ownership in the region – preliminary results of the thematic study

Documentation: ECE/TIM/2016/Inf.1

4. In 2006-2007, the ECE/FAO Forestry and Timber Section carried out a survey on private forest ownership in the ECE region, and published the findings in Geneva Timber and Forest Study Paper No. 26 “*Private forest ownership in Europe*”. Since then, forest ownership and tenure has undergone significant changes, with further implementation of the restitution of forestlands. In addition, new types of ownership have emerged, as well as new forest management structures (within the same ownership type), but with very different priorities and aims for their forestlands. In some countries, legislative frameworks made forests an attractive asset for individuals, corporations and pension funds. Investment in forestlands by private entities was analysed in the Forest Products Annual Market Review 2014-2015 in the chapter on “*Institutional forestland ownership and its effects on forest products markets*”.

5. In order to update information on forest ownership and tenure in the ECE region, the Forestry and Timber Section, in close collaboration with scientists from the COST Action FACESMAP, conducted a new forest ownership questionnaire. This survey is much broader than the previous one from 2006, as it covers all types of forest ownership and tenure. Thirty-two member States provided replies to the secretariat by the end of 2015. The secretariat compiled a database and shared it with analysts, who have started evaluating the results. The Committee will be given a preview of the preliminary results of this study.

6. The Committee is expected to discuss and comment on the results and give suggestions for the conclusion of the work on this study.

(b) Forest sector workforce and future green jobs in the region – preliminary results of the study

Documentation: ECE/TIM/2016/3

7. The forest sector workforce is increasingly facing challenges, with an ageing workforce, mechanization, and drivers such as climate change and global trends in the production and consumption of forest products. However, the transition of the industry towards a bio-based green economy offers many opportunities and some challenges to be dealt with. The Forestry and Timber Section initiated work on the

thematic study to learn more about the status of the forest sector workforce, and to examine the challenges and opportunities ahead. Delegates will be given a preview of the preliminary results of the study on the forest sector workforce and future green jobs in that sector, which covers the whole ECE region with a specific focus on the Balkans and Eastern Europe. The study includes aspects of communication, education and gender, all of which influence the image and attractiveness of the sector.

8. The Committee is expected to discuss and comment on the results and give suggestions for the conclusion of the work on this study.

3. Forest products and markets

(a) Forest products market discussions including panel discussion: opportunities for and barriers to forest products from the perspective of the private sector

Documentation: ECE/TIM/2016/4

9. The Committee will review developments in forest products' markets in 2016, and prospects for 2017 at national, subregional and regional level, based on the Forest Products Annual Market Review 2015-2016 (Geneva Timber and Forest Study Paper, ECE/TIM/SP/39), countries' written market statements, countries' market forecasts, and expert presentations. Delegates will be invited to discuss past developments, as well as prospects for 2017.

10. Member States have been invited to submit written country market statements based on a recommended outline. These statements are in electronic format only and will be posted in advance of the session on the website of the ECE/FAO Forestry and Timber Section.

11. Countries are also requested to complete a market forecast questionnaire for 2016 and 2017 by 15 September 2016. (The questionnaire will be issued by the secretariat by the end of July). The results of this will be made available to delegates at the meeting for their review.

12. The market discussions will begin with presentations on market developments by subregions (Europe, CIS and North America).

13. After the market discussions and an overview on the trends and developments at a broader level, representatives from forest-based industries will share their perspective and experience on the opportunities for, and barriers to, realizing the potential contribution of forest products in a green economy. Participants of the panel will be invited to discuss the potential future competitiveness of the different forest products' sectors in the ECE region within the context of global societal and economic trends and developments.

14. The Committee is expected to approve the Committee on Forestry and Forest Industry (COFFI) market statement, summarizing the market developments, discussions and forecasts, prepared during the session, which will be annexed to the meeting report.

(b) Trends and perspectives for selected forest products (pulp and paper, pallets and wooden packaging)

Documentation: ECE/TIM/2016/5 and ECE/TIM/2016/6

Pulp and paper

15. The secretariat prepared Items 3(b) and 3(c) in response to the Committee's request at its seventy-third session to provide a stronger focus on forest products' markets and marketing.

16. Wood markets in the ECE region experienced a significant drop in production and consumption during the economic downturn in the wake of the economic crises in 2008. The entire sector, following the overall economic trend in the region, lost shares in global production.

17. In 2000, wood pulp produced in the ECE region accounted for almost 75% of global production. North America accounted for 50% of global production in the same year. In 2014, pulp produced in the ECE region accounted for only slightly over 60% of global production. This was mainly caused by a tremendous drop in production in North America, which, in 2014, only produced 37% of globally produced pulp. Developments among member States in the ECE region differ between subregions, and countries within the subregions reacted differently to the economic, societal and technological challenges.

18. Low interest rates, loose monetary policy, and direct and indirect subsidies enable tremendous investments in very large, highly-efficient pulp mills, mainly outside the ECE region. These developments have the potential to trigger a shift in the global distribution of pulp production capacities in the medium and long term. In addition, significant societal changes have led to reduced use of paper. The increasing use of mobile devices has drastically changed the ways newspapers and books are read and bills are paid, decreasing demand for printing paper.

19. Experts will present details about current developments in the pulp and paper markets in the ECE region, how producers in the region are coming under pressure from external markets, and opportunities in the global market for pulp products from ECE member countries.

20. Delegates will be invited to take note of this Item. The Committee is expected to discuss the future for pulp production in the ECE region as well as alternatives for producers in the region.

Wooden packaging

21. Wood products can benefit from the increasing use of electronic media and intensified global trade. Products and solutions related to packaging and trade, such as cardboard boxes, pallets and wooden packaging, saw strong growth over the past decade and are likely to continue the positive trend. The classification of wooden packaging includes pallets, pallet collars, box pallets, boxes, crates, cable drums, lightweight packaging for fruit and vegetables, barrels, tailor-made construction, and dunnage for supporting goods under transportation. The Forest Products Annual Market Review's 2016 special chapter is on "Wood pallets and wooden packaging", to highlight the importance of this often-neglected sector, which has a strong influence on the sawmill sector. Global demand for wood pallets is expected to be over 5.1 billion units by 2017, which is an equivalent of 200 million m³ globally. It is estimated that almost 10 billion pallets are currently in circulation (about 1.4 pallets per inhabitant).

22. Delegates will be invited to take note of this Item. The Committee is expected to discuss the role of wooden packaging in the ECE region.

(c) Wood construction in the region: what can forest industries do to help nurture a paradigm shift to using wood for green construction?

Documentation: ECE/TIM/2016/Inf.2

23. Building with wood is probably the biggest single opportunity for the forest sector to contribute to the low-carbon, green, bio-preferred, bio-based, circular or, simply, bio economy.

24. Wood construction has been on the agenda of COFFI in past years, and presentations have mostly focused on the technical, innovative and carbon-friendly aspects of wood for construction. Public perception, building policies and many other industries, e.g., architects, engineers and builders, have thus far provided the major inputs, which have controlled the building materials agenda.

25. The Forestry and Timber Section published the Geneva Timber and Forest Study Paper No. 38 on *“Promoting sustainable building materials and the implications on the use of wood in buildings”*. The study highlights the current policy and regulatory environment regarding sustainable construction materials in the building sector in Europe and North America, and, where applicable, offers a commentary on the effectiveness of such regimes in driving the adoption of wood products. The study’s objective has been to conduct a broad survey across a range of policies, initiatives and programmes in order to document the current circumstances as a starting point for further discussions, technical meetings and policy debates with a view to enhancing the use of wood in buildings through policy advice to member States.

26. The elevation of building performance requirements to reduce operational and embodied energy (meaning the carbon balance of buildings during construction, use, demolition and recycling) puts wood at an advantage over many other building materials. It is too early to determine the full impact of the UNFCCC COP21 agreement, and the Sustainable Development Goal (SDG) 11 *“Cities - Make cities and human settlements inclusive, safe, resilient and sustainable”*. However, building rules and regulations have started to shift and may offer greater opportunities for wood construction in the future.

27. The decision on favourable rules and regulations, and whether and how wood will be used for a building, relies upon decisions by groups from outside the forest sector. The secretariat will invite a selected number of representatives from the group of those experts who define the framework conditions for wood construction, such as regulators and policymakers, specifiers, city planners, the insurance industry, and financiers, to identify key barriers, determine approaches and develop ways to break down these obstacles in their area of work. The secretariat will further invite a selected number of representatives of the group of experts who actually decide about the material and who work with wood as a building material, such as architects, builders, contractors, project leaders, and educators.

28. The Committee is expected to discuss experiences with existing and potential partnerships, and synergies with these defining and regulatory groups, and is invited to discuss how the forest sector could further engage with these groups who ultimately determine the use of materials.

4. The global and regional policy context

Documentation: ECE/TIM/2016/7

(a) The role of forests, their goods and services, and the forest sector in the implementation of the 2030 Agenda for Sustainable Development

29. In September 2015, the General Assembly of the United Nations adopted the 2030 Agenda for Sustainable Development. It includes a list of universal SDGs. After the adoption of the Agenda, intergovernmental negotiations on a framework for the monitoring and review of the Agenda, including SDG indicators, have continued. Participants of the session will be presented with the recent developments on the Agenda, including consultations on the “follow-up and review” and the future global indicators, as well as the possible role of regional commissions in the support of country-level implementation of the Agenda.

30. The Committee will be invited to take note of the information provided and advise the secretariat on related future work.

(b) The United Nations Forum on Forests – the status of the 2017-2030 Strategic Plan

31. The UNFF Ministerial Declaration and Resolution 2015/33 on the International Arrangement on Forests beyond 2015 were the two key negotiated outcome documents of the 11th session of the Forum. In line with the Resolution, a UNFF open-ended intergovernmental Ad Hoc Expert Group was established to develop proposals on the UNFF Strategic Plan for the period 2017-2030 and the quadrennial programme of work for the period 2017-2020. The first meeting was held in New York on 25-27 April 2016, and the second meeting is planned for October 2016 in Bangkok. Participants will be briefed on the outcomes of the two meetings and the planned developments in this area of work, including the role of regional stakeholders.

32. The Committee will be invited to take note of the information provided and advise the secretariat on future work in this area.

(c) Forest Europe - Programme of Work and possible synergies in the region

33. As of October 2016, the Forest Europe process is co-chaired by Spain and the Slovak Republic, which also hosts the secretariat of the process – the Liaison Unit Bratislava (LUB). The first Forest Europe Expert Level Meeting, organized after the 7th and Extraordinary Ministerial Conferences on the Protection of Forests in Europe, held on 11-12 May 2016, adopted the new Forest Europe Work Programme. The Terms of Reference and Roadmap for the Working Group on the Future Direction of Forest Europe were also adopted at this meeting. In order to facilitate commitment and cross-regional collaboration, signatories and observers were invited to express their interest in its implementation. Delegates will be briefed on the Forest Europe Programme, and activities planned that are congruent with those of the IPoW.

34. The Committee will be invited to take note of the provided information in this Item, and advise the secretariat on future work as it relates to the joint work with Forest Europe.

(d) Developments in other relevant organizations and processes

35. Participants will be informed of the outcome of the 23rd session of the FAO Committee on Forestry (COFO), scheduled for 18-22 July 2016 in Rome, Italy, and other relevant developments.

36. The Committee will be invited to advise the secretariat on future work.

5. Reporting on and implementation of the 2014-2017 IPoW and related decisions

(a) Report of the ECE/FAO Working Party on Forest Statistics, Economics and Management

Documentation: ECE/TIM/EFC/WP.2/2016/2

37. The Committee will be presented with the outcome of the 38th session of the joint ECE/FAO Working Party on Forest Statistics, Economics and Management held on 23-24 March 2016. This will include information on the meetings and the work plans of the ECE/FAO Teams of Specialists established for the ECE/FAO 2014-2017 IPoW.

38. The Committee will be invited to take note of, and comment on, the provided information.

(b) Review of 2016 activities, and activities planned for 2017

Documentation: ECE/TIM/2016/8

39. The Committee will be informed of, and invited to discuss, activities implemented in 2016 and those planned for 2017.

(c) The ECE evaluation on the assessment of the relevance of the 2014-2017 Integrated Programme of Work

Documentation: ECE/TIM/2016/9

40. As part of the 2016-2017 Evaluation Work Plan, the ECE carried out the "Assessment of the relevance of the 2014-2017 IPoW to the needs of member States and challenges in the forest sector". The IPoW was endorsed by the ECE Executive Committee in 2015. The evaluation of its relevance is part of the ECE Evaluation Work Plan and, as such, different from the 2016-2017 SR of the IPoW. However, the results of the evaluation could provide useful information for the SR and for the development of an IPoW for the period 2018-2021. The evaluation was carried out by an external evaluator, through a questionnaire to member States and observers, which was followed up by interviews with stakeholders.

41. The Committee will be briefed on the results and recommendations of the evaluation. Delegates will be invited to take note of the information provided.

(d) Strategic Review of the Integrated Programme of Work

Documentation: ECE/TIM/2016/10

42. The main objectives of the SR of the IPoW for COFFI and the FAO EFC are to (i) evaluate the 2014-2017 IPoW, taking into consideration its implementation and also past experience; and (ii) develop a proposal for the IPoW for 2018-2021.

43. For the purpose of the SR, the secretariat prepared a comprehensive questionnaire, aimed at assessing and assimilating the views of member States and stakeholders regarding the IPoW. The questionnaire, which covers: scope, structure and content of the programme; and methods, partnerships, outputs, objectives and work of the joint EFC and COFFI subsidiary bodies, was shared with all member States and relevant stakeholders. The results of the questionnaire will provide the basis for discussion in review meetings, and prepare for the new IPoW proposal.

44. The secretariat will present to the Committee the SR process and the results of the stakeholders' survey. Delegates will be invited to discuss and comment on the results of the survey.

6. Election of officers

45. In accordance with the amended Rules of Procedure, the Committee is expected to elect its Chair and Vice-Chairs, who will hold office until the end of the seventy-fifth session. At the seventy-third session, the following individuals were elected (to hold office until the end of the seventy-fourth session): Mr. Christoph Dürr (Switzerland) as Chair and Ms. Marta Gaworska (Poland), Mr. Heikki Granholm (Finland) and Mr. Guy Robertson (United States) as Vice-Chairs.

7. Date and place of the next session

46. At "Silva2015", it was decided that the next session of the Committee would be organized jointly with the FAO EFC in 2017, and hosted by Poland in conjunction with the third European Forest Week.

8. Any other business

47. At the time of writing, no points had been proposed under this Item.

9. Adoption of the report

48. The Committee will be invited to adopt its report on the basis of a draft prepared by the secretariat.

III. Tentative Timetable

Committee on Forests and the Forest Industry, seventy-fourth session

Tuesday, 18 October 2016

10:00-13:00 Opening of the session, and welcome remarks
 Item 1 – Adoption of the agenda
 Item 2 – Forest ownership, and employment in the forest sector

15:00-18:00 Item 3 – Forest products and markets (a)

Wednesday, 19 October 2016 (business day)

10:00-13:00 Item 3 – Forest products and markets (a - panel)

15:00-18:00 Item 3 – Forest products and markets (b and c)

Thursday, 20 October 2016

9:30-12:30 Item 4 – The global and regional policy context
 Item 5 - Reporting on and implementation of the 2014-2017 Integrated
 Programme of Work and related decisions (a and b)

14:30-17:30 Item 5 cont. - Reporting and implementation of the 2014-2017 Integrated
 Programme of Work and related decisions (c and d)
 Item 6 – Election of officers
 Item 7 – Date and place of the next session
 Item 8 – Any other business
 Item 9 – Adoption of the report
 Closing of the session
