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ASIA-PACIFIC FORESTRY COMMISSION

TWENTY-FIRST SESSION

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ASIA-PACIFIC FOREST SECTOR OUTLOOK STUDY

SECRETARIAT NOTE

ASIA-PACIFIC REGION IN 2020

1. Recent analyses indicate that a continuation of the current pace of economic growth will result in Asia and the Pacific becoming the leading economic region in the world by 2020. By then a vibrant industrial society may well have developed and substantial progress achieved in the transition to a knowledge-based economy, largely based on human skills. Although underdevelopment may persist, the Asia-Pacific region is expected to largely achieve the Millennium Development Goal of eradicating absolute poverty. Manufacturing is expected to continue to expand, firmly establishing the region as the “factory of the world,” producing a full range of consumer products very competitively. The region will also likely move to the forefront of producing high-tech products, taking advantage of developments in nano technology and biotechnology. Intra- and inter-regional trade will flourish along with the exchange of ideas and thoughts, bringing people together and cherishing diversity.
2. However, even such a transition will certainly not be problem-free. Asymmetrical globalisation will exclude some segments of society – especially in rural areas – from the benefits of economic growth and pockets of poverty are likely to persist in many countries. More importantly, the demand for basic resources, in particular energy and water, will increase substantially. Rapid growth will also have significant adverse effects on the environment. Increased demand for wood and wood products will result in significant pressures on forests within and outside the region. Although Asia and the Pacific is in the forefront in establishing planted forests, dependence on natural forests for wood production is likely to persist in several countries. Ensuring that resource use moves to a sustainable path will require significant changes in the policy and institutional framework. It will also require substantial investment in relevant technologies, taking advantage of the developments in science.
3. The key question that the forestry profession will have to address is how the sector will cope with the changes outlined above and steer forestry in a direction that makes it relevant and appropriate to the emerging needs of the countries in the region. While demand for wood and

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wood products will continue to increase, so will the demand for environmental services. Continuing economic growth will also boost the tourism sector, providing increased opportunities for eco-tourism, which will also have significant impacts on the forest sector. Sustaining rapid economic growth is particularly dependent on increased energy needs, and as the uncertainty of supplies from traditional producers persists, a number of countries in the region are searching for alternative sources of energy, including bio-fuels.

4. Obviously, forests and forestry in 2020 will differ from what they are today. Understanding the global and regional changes, identifying the emerging opportunities and challenges and indicating the options available to countries and other key players is the objective of the Asia-Pacific Forest Sector Outlook Study II.

ASIA-PACIFIC FOREST SECTOR OUTLOOK STUDY II

5. Under the guidance of the Asia-Pacific Forestry Commission, FAO in collaboration with the countries and individual experts in the region completed the first Asia-Pacific Forestry Sector Outlook study (APFSOS) in 1998. This study synthesized the key forestry issues in the region, provided a broad perspective of the state of forests and forestry and of the probable direction of developments to the year 2010. It formed the basis for a number of regional and national initiatives and the very large number of documents prepared during the study comprised a valuable source of information for a wide range of forestry issues. In fact, APFSOS compiled some of the most widely referenced documents on the broad direction of developments in the forest sector in the region.

6. Since the completion of the first Asia-Pacific Forest Sector Outlook Study, the overall social, economic, political and institutional environment within and outside the region has undergone unprecedented changes and, as indicated earlier, the pace of change is accelerating. Obviously, it is important to understand how the sector is likely to develop in the next 15 years or so. As countries become more integrated through global, regional and sub-regional economic cooperation agreements, national forest programmes will be required to adapt to the new opportunities and challenges. It is in this context that FAO proposes a revision of the earlier outlook study focusing on the likely changes to the year 2020.

Objectives and outputs of APFSOS II

7. The proposed objectives of the Asia-Pacific Forest Sector Outlook Study II are to:

- assess changes in the state of forests and forestry in Asia and the Pacific since the earlier outlook study, and analyze the actual developments in comparison with what was predicted;
- analyze the key driving forces and probable scenarios of developments in the forest sector in the region, specifically taking into account the overall changes in the global forestry situation;
- identify the priorities and strategies for the forest sector, and enhance the strategic planning capacity at various levels in order to respond effectively to the emerging opportunities and challenges.

8. The major output from APFSOS II will be a regional report that provides a systematic assessment of the current situation of forests and forestry, the key change drivers to the year 2020, the probable paths of forestry development in the region and the options available to the various stakeholders in improving the situation. In preparing the regional report, effort will be made to capture sub-regional specificities that address the particular constraints and opportunities. In addition to the main report, APFSOS II will also produce a number of thematic reports providing in-depth assessment of cross-cutting issues. Synthesizing the findings from the regional report and the thematic studies, APFSOS II will also produce short policy briefs summarising key issues and recommendations on important themes to take the study to policy makers.

9. APFSOS II is intended to strengthen the national forest programme through providing the larger picture of forestry development in the region taking due account of the global trends and the emerging opportunities and challenges. An important outcome of the process will be the strengthening of the strategic planning capability in the forest sector. It will considerably enhance the knowledge base and sharpen the process of prioritisation of interventions in the sector.

Key questions for APFSOS II

10. By undertaking the Asia-Pacific Forestry Sector Outlook Study II, attempts will be made to answer the following questions:

- What will be the future role of forests and forestry in the rapidly changing Asia-Pacific region?
- What will be the progress towards accomplishing sustainable forest management?
- How will the future demand for wood and wood products be met?
- Considering the underdeveloped nature of many locations in the region, what will be the role of forests and forestry in improving social and economic conditions, especially in alleviating poverty?
- What will be the future of forest industry in the region, especially in the context of a changing investment climate and increased trade in wood and wood products?
- How could forestry respond most effectively to environmental concerns, especially relating to climate change? How will forestry be affected by the increasing concern for protection of the environment and how will it address the potential conflicts in dealing with multiple objectives?
- What are the lessons learned from the experiences of countries in dealing with the changing societal demands on forests and how could these be used in addressing future challenges?

11. As the study progresses, more questions will emerge and by exploring these issues, APFSOS II aims to provide an indication of the probable development scenarios and the options available to member countries.

APPROACH TO APFSOS II

12. Taking into account the experience of implementing the 1998 APFSOS and the various regional and global outlook studies by FAO, APFSOS II will be implemented by:

- synthesizing the wealth of information and experience available on forests and forestry in the region, especially on the various initiatives in the recent years;
- drawing upon the expertise in forestry and social and economic development through building up networks of institutions and experts; and
- undertaking in-depth thematic studies on cross-cutting issues that are critical in assessing the future development of the forest sector in the region.

13. FAO has already initiated a revision of the global outlook, which will provide estimates of demand for and supply of wood and wood products to the year 2020. This update takes into account in particular the changes at the country and regional levels, providing useful information on demand and supply forecasts for all important forest products in the Asia-Pacific region.

14. In undertaking APFSOS II, specific consideration will be given to the emerging social and economic changes in the region and their direct and indirect impacts on the forest sector. This will be done by strengthening the linkage with ongoing work on economic and policy assessments in the region undertaken within and outside FAO. Specific attention will be given to understanding the impact of structural changes in the economies on the forest sector, especially in the context of globalisation.

15. The process of APFSOS II will make every effort to engage all the key stakeholders in the region. Workshops will be organized to facilitate exchange of information and to develop a coherent view of possible paths of forestry development. An expert advisory committee will be established to provide technical oversight, especially to review the regional report.

16. Success of such a process depends entirely on the active participation of the member countries. All the countries are encouraged to provide their ideas and views on forestry development. This could preferably be done through a national focal point who will help to integrate the different issues and perceptions at the country level.

CONCLUSION

17. The Commission is invited to discuss the proposal and to indicate the key questions and issues that the proposed outlook study needs to consider. It may also provide guidance on the approach to undertaking the study.