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ASIA-PACIFIC FORESTRY COMMISSION

TWENTY-SEVENTH SESSION

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ASIA-PACIFIC FOREST SECTOR OUTLOOK STUDY: THE PATH TO 2030

SECRETARIAT NOTE

Asia-Pacific forests in the context of societal changes

1. Forests and forestry in the Asia-Pacific region continue to undergo rapid changes in response to the collective impact of a number of drivers at global, national and local levels. While some countries have reversed forest cover loss, many are yet to successfully address significant deforestation and forest degradation. Collective impacts of various drivers will result in a changing mosaic of land uses, significantly impacting the provision of goods and services and thus food security and livelihoods. Ongoing efforts to pursue a path of development that is sustainable and equitable as envisaged under the Sustainable Development Goals (SDGs) will require key changes in the forest sector. Additionally, the Paris Agreement envisages concrete measures in forestry to address climate change. All of these factors will require a clear assessment of emerging development scenarios and necessary actions to steer forestry onto pathways that maximize its contribution to achieving sustainable development.

Previous outlook studies

2. FAO has been undertaking global and regional perspective studies, especially in agriculture and forestry, for the past 20 years. Under the guidance of the Asia-Pacific Forestry Commission (APFC), FAO, in collaboration with member countries and partner organizations in the region, completed the first Asia-Pacific Forest Sector Outlook Study (APFSOS I) in 1998. This synthesized key forestry issues in the region, provided a broad perspective of the state of forests and forestry, emerging issues and outlined a set of priorities and strategies to the year 2010. APFSOS I formed the basis for a number of regional and national initiatives. It provided valuable information on a wide range of forest issues, thus helping to understand the broad direction of developments in forestry in the region.

3. The second Asia-Pacific Forest Sector Outlook Study (APFSOS II) was recommended by the 21st Session of the APFC. This study was completed in 2010. It extended the time horizon of the

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outlook to 2020, incorporated post-1998 changes at global, regional and national levels, identified various scenarios, assessed what could be expected to the year 2020 and asked what needed to be done to strengthen sustainable forest management (SFM). The development of APFSOS II was highly participatory, resulting in the preparation of 24 country outlook reports, 15 thematic assessments, five subregional reports and a regional overview report. These reports have become important sources of information on a wide array of issues for forestry stakeholders – be they governments, civil society organizations, the private sector and bilateral and multilateral agencies – in developing strategies and making informed decisions; even now the reports remain valuable reference material for guiding policies, programmes and projects.

Need for an updated forest sector outlook

4. A wide range of countries and organizations have noted the importance and usefulness of the previous two APFSOS studies in guiding policy development, strategic planning, institutional restructuring and capacity development. However, while the broad trends visualized in the 2020 outlook study are still valid, the APFC theme *Forestry in a new landscape* emphasizes the increasing need to refine and update the APFSOS II findings to take into account important post-2010 developments and provide an overview of probable paths of forest sector development to the year 2030 and beyond. Recently, a variety of partners and collaborators have identified this need for refinement and updating of the outlook for Asia-Pacific forestry. In this context, FAO proposes to implement a new Asia-Pacific Forest Sector Outlook Study: The path to 2030 (APFSOS III).

Objectives of the Asia-Pacific Forest Sector Outlook Study: The path to 2030 (APFSOS III)

5. The proposed objectives of APFSOS III are to:

- Anticipate and assess changes and trends at international, regional and national levels that affect the direction of the forestry sector. Many of the major changes in society are taking place outside the forest sector, however, they have huge impacts on forestry;
- Support countries in Asia and the Pacific to develop greater understanding of how the forest sector will evolve both nationally and in the broader regional context. APFSOS III will also provide countries with insights into international and regional trends, emerging thematic issues and broader view of development that will be useful in charting their forest sector development;
- Analyse changes with regard to forests and forestry in Asia and the Pacific since the 2010 outlook study, assess actual developments in comparison with what was forecasted and identify necessary strategic changes;
- Assess how the evolution of demographic, economic, social, technological, environmental and cultural drivers of change will impact on the forest sector, including key issues such as aging populations, urbanization, economic development and poverty alleviation (among many others).
- Analyse the potential to position forestry more prominently in integrated landuse and landscape management planning and in the overarching policy processes in Asia and the Pacific.
- Assess probable paths of developments in the forest sector in the region, taking into account key drivers of change and probable scenarios, giving due attention to the changing nature of society-forest relationships and taking into consideration various uncertainties;
- Assess the contributions that forestry is making to regional and global food security and nutrition and describe how these are likely to evolve in the period to 2030;
- Provide an indication of how major global initiatives such as the SDGs and the Paris Agreement on Climate Change could impact forests and the forest sector and what needs to be done to enhance the sector's contribution to the 2030 Agenda; and

- Outline priorities and strategies that the forest sector may pursue during the coming decades to enhance its contribution to societal well-being, giving due attention to improving living standards and livelihoods in rural communities and enhancing the provision of critical ecosystem services.

Proposed APFSOS III process

6. APFSOS III is proposed to adopt an elaborate approach to collecting and synthesizing information from member countries through preparation of country outlook papers and preparation of a series of thematic papers on cross-cutting issues with support from member countries and partner organizations. Having addressed many issues very systematically and having developed a solid foundation, the main thrust of APFSOS III will be to specifically focus on what has changed since 2010, what the implications of these changes are and to revise scenarios based on what is likely to emerge during the next decade by 2030 and beyond.

7. APFSOS III will also recognize the important ongoing efforts by various partner organizations that provide valuable insights on critical issues relating to forests and the forest sector in the region. The process for undertaking the next outlook study will therefore focus on mobilizing knowledge and experience from the many stakeholders including member countries, partner organizations and professionals as detailed below:

- Establish a core group of experts to steer the process;
- Build partnerships with member countries and key organizations, also from outside the forest sector, to undertake thematic studies on topical issues;
- Synthesize forest sector initiatives at the national level tapping into ongoing efforts by national forestry agencies in the region;
- Take advantage of various networks of forestry and allied professionals and tap into their knowledge and experience;
- Analyse the vast wealth of information available from different sources and organize workshops and discussions to analyse key issues; and
- Involve young forestry professionals to articulate their visions and perceptions.

Proposed outputs

8. The main outputs expected from APFSOS III are:

- A comprehensive report providing an overview of forests and the forest sector in Asia and the Pacific, key drivers of change to the year 2030 and their implications, probable scenarios of forest sector development and what may be done to adapt forestry to meet the changing demands from society;
- A synthesis of key findings and conclusions for policy-makers;
- A series of in-depth analyses of key topical issues; and
- Policy briefs on important issues.

Time frame

9. Preparatory work will commence at the end of 2017 and most activities will be completed by mid-2019. Findings and recommendations are being planned to be placed before the 28th Session of the Commission in 2019.

Points for consideration and discussion

10. The Commission is invited to discuss the need for, and relevance of, APFSOS III as a vehicle for analysing and addressing key developments that have taken place since 2010. The Commission may wish to provide guidance on issues to be addressed, the process to be adopted and how wider stakeholder involvement could be assured in undertaking APFSOS III.

11. The Commission may in particular discuss:

- Modalities for undertaking APFSOS III as a collaborative effort involving key stakeholders in the region;
- The outputs that may be produced at the end of the study and what may be done to ensure that the findings are effectively communicated to various stakeholders;
- Partnership and collaboration mechanisms that can be pursued to ensure the success of APFSOS III; and
- Key issues that APFSOS III may consider, taking into account developments in the forest sector witnessed during the last decade and what is expected to emerge in the coming decade and beyond.