

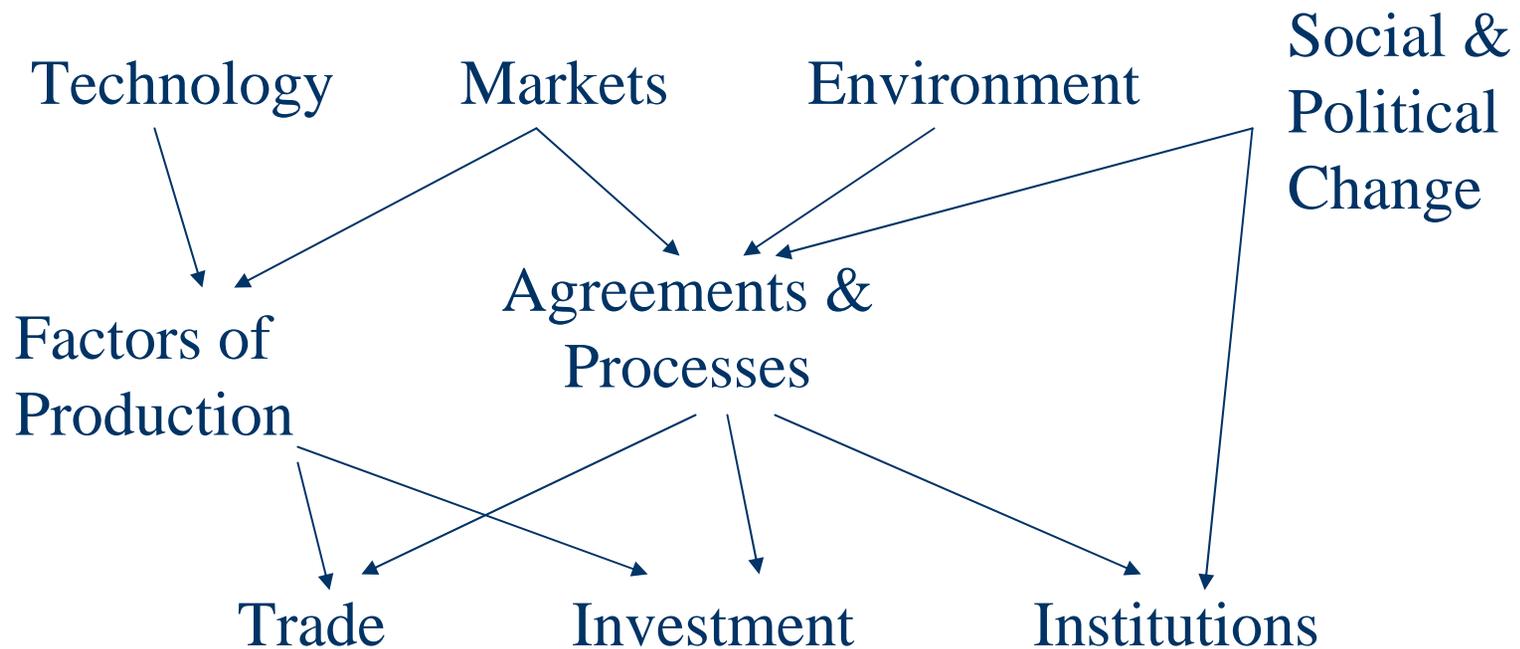
Trade, Forest Management and International Forest Policies

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International Issues Affecting the Forest Sector



Market Trends

- Increasing processing efficiency and diffusion of technology
- Raw material trends: greater use of smaller timber, plantation timber, and recycled fiber
- Increasing “consumption efficiency”
- Substitution among forest products

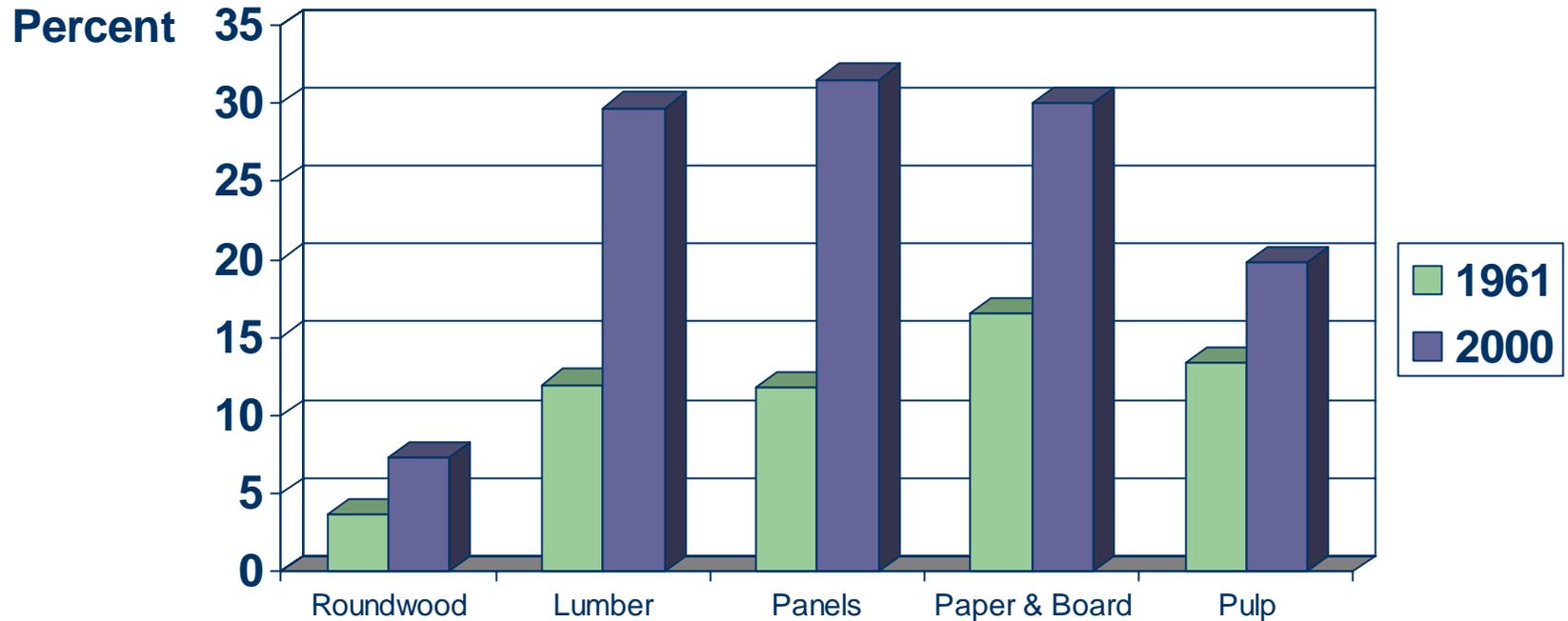
Management Trends

- Greater reliance on managed forests, private forests, plantations, and recovered fiber
- Increasing share of timber produced in managed, including intensively-managed forests
- Increasing importance of investment and management organizations
- Greater effort to market good management

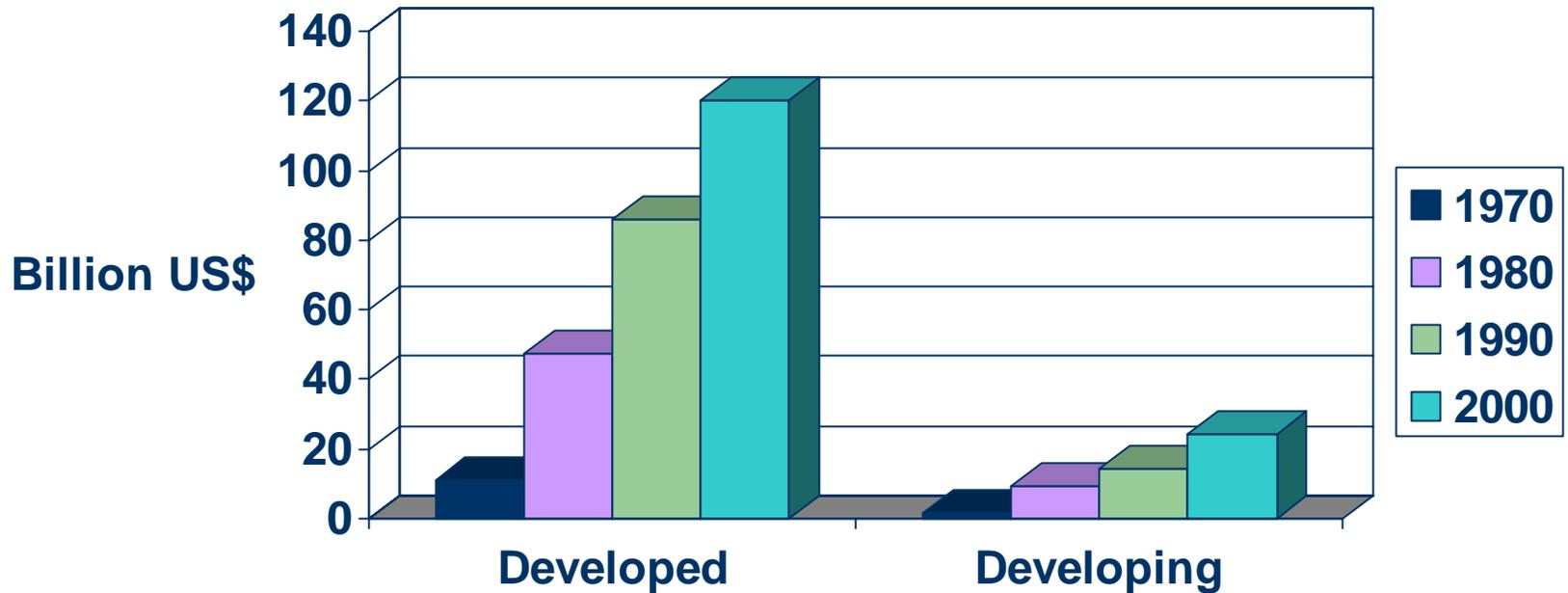
Industrial Roundwood Consumption and World GDP, 1985-2004



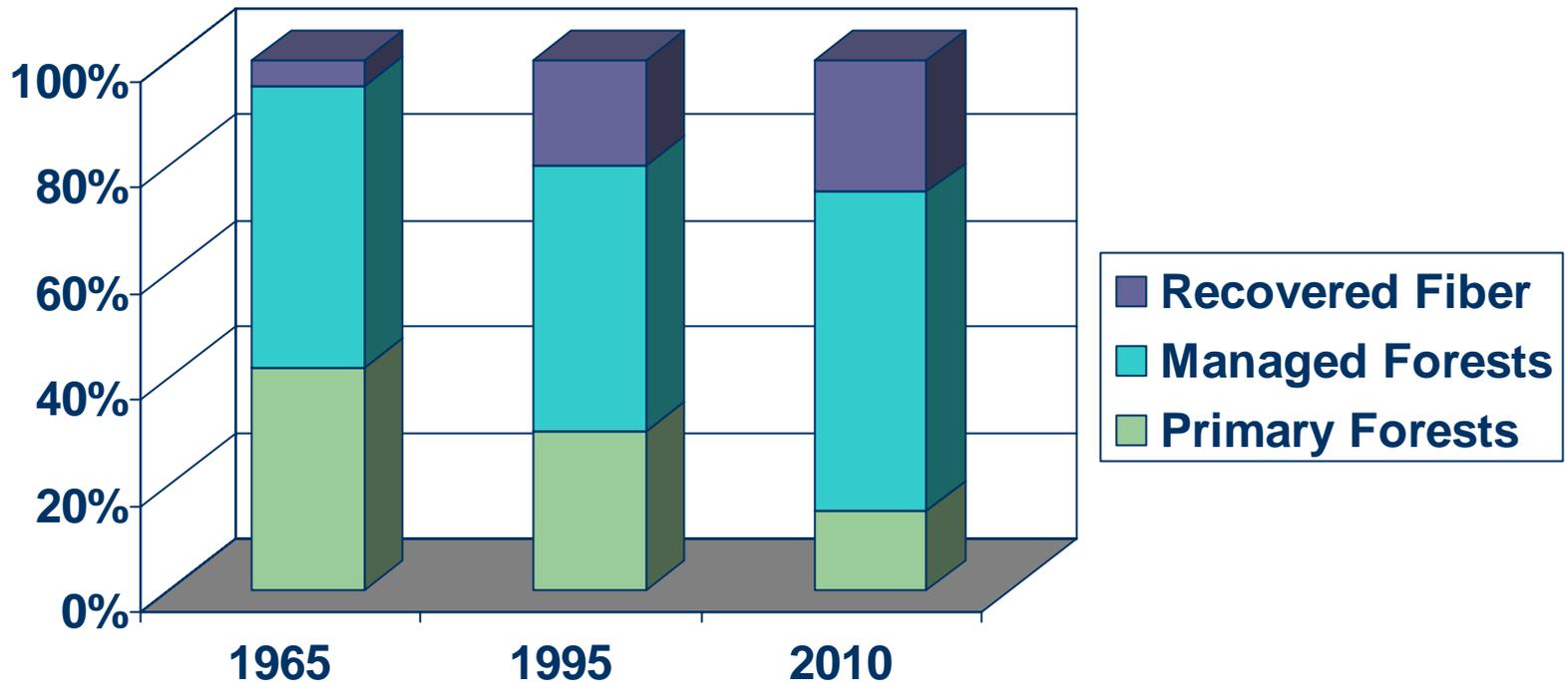
Share of World Production Entering Trade, 1961 and 2000



Value of Forest Products Exports, 1970 to 2000



Estimated and Projected Sources of Industrial Wood Fiber



International Context

- Deeper and wider integration supported by trade and investment liberalization
- Expanding and evolving international debate over forest management practices
- Increasing recognition of non-commodity value of forests
- High profile resource policy issues with trade links

Selected Intergovernmental Forest-related Activities, 1980-2005

- 1983 ITTA
- 1990 G7 “GFA”
- 1992 UNCED
- 1993 MP C&I
- 1994 ITTA
- 1995 IPF
- 1997 IFF
- 1998 G8
- 2000 UNFF
- 2001 Asia FLEG
- 2002 WSSD (CBFP)
- 2004 ITTA
- 2004 Africa FLEG
- 2005 G8
- 2005 ENA FLEG
- *2006 UNFF*

International Context

- Key forest-related negotiations include:
 - UN Forum on Forests
 - International Tropical Timber Agreement
 - FLEGs
- Other relevant negotiations / processes:
 - WTO
 - CITES
 - Criteria and Indicators

Key points: Trade

- Forest products trade has increased in absolute and relative importance
- Trade has reinforced broad-scale trends in management, production, and consumption
- Further gains from trade liberalization and economic integration are possible

Key points: Trade

- Further trade liberalization is consistent with development and improved management of forests
- Non-tariff barriers increasingly important
- Emerging issues (e.g. illegal logging)
- Importance of trade should not be overstated

Key points: Policy

- Policies other than trade policies are the primary tools for SFM
- Continuing need for effective protection against forest pests and diseases
- Less attention to “global” solutions and more attention to regional efforts

Key points: Policy

- No overarching “international forest policy”
- Many relevant processes & negotiations
- Continuing international influence on domestic policies & practices