

Dutch Forests and the Forest sector: scenarios until 2030

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Probos, *Expertise center*

- Mission: Sustainable forest management and forest expansion
- Working on mission through projects, e.g.:
 - Measuring market share of certified timber in NL (5 times) and Be (3 times)
 - Assist NL government with TPP
 - Market intelligence, a.o.: Dutch national correspondent for UNECE/FAO, ITTO, MCPFE (Forest Europe), etc.
 - Trade statistics for ETTF
 - National correspondent ITTO IMM

Action plan: Forest and Wood



Action plan: Forest and Wood

- Ambitious Bio-economy strategy
 - Renewable energy
 - Renewable materials and chemicals



- Extra demand of 30 mil. m³/yr. in 2030
- Increasing consumption of wood: from 0.9 m³ to 1.5-2 m³ per inhabitant

Action plan: Forest and Wood

- Aim: Sustainable sector with high contribution to the bio-economy and climate goals

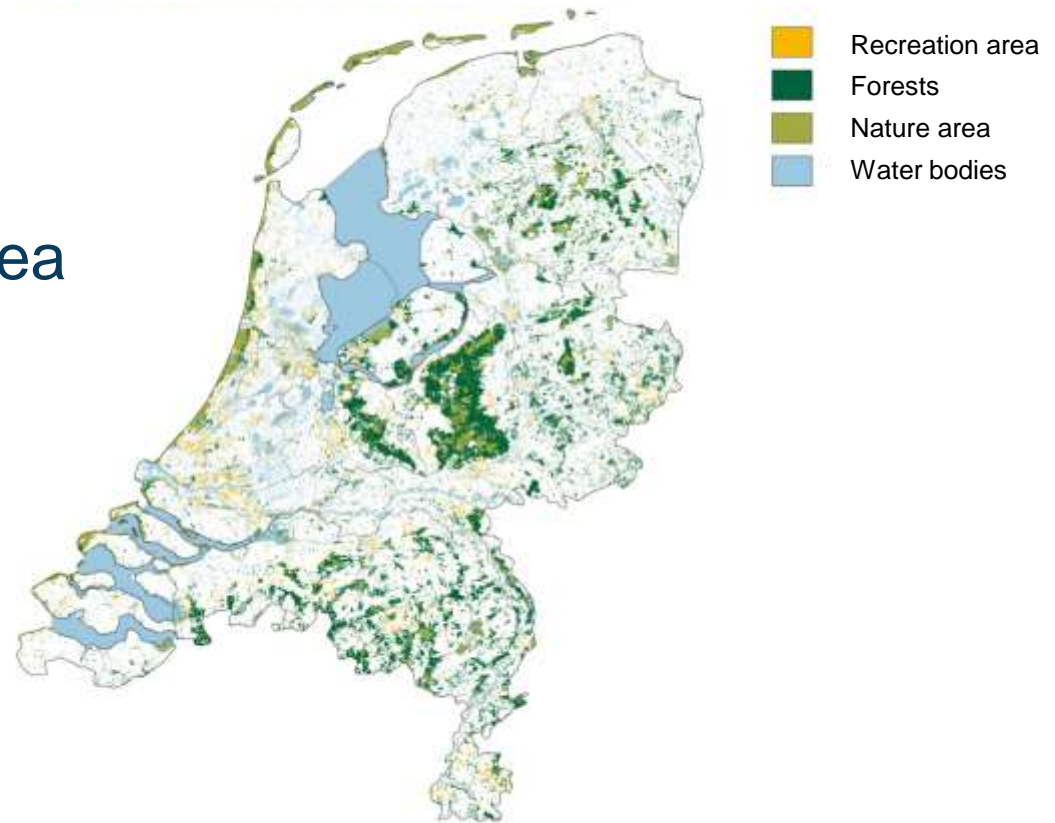
Action lines:

1. More forests
2. More with forests
3. More with wood



Dutch forests and forest sector

- Forests
 - 370.000 ha
 - 11 % of the land area



Source: CBS and Kadaster

Dutch forests

100 million visits
each year



Dutch forests and biodiversity



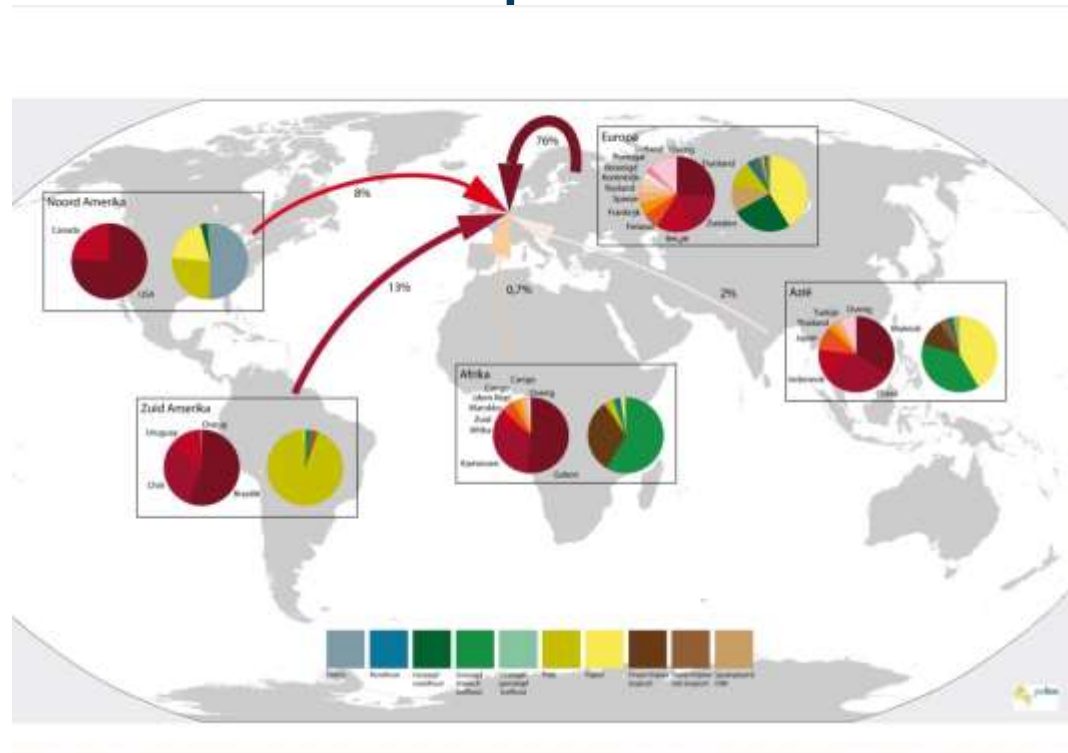
Dutch forests and timber production

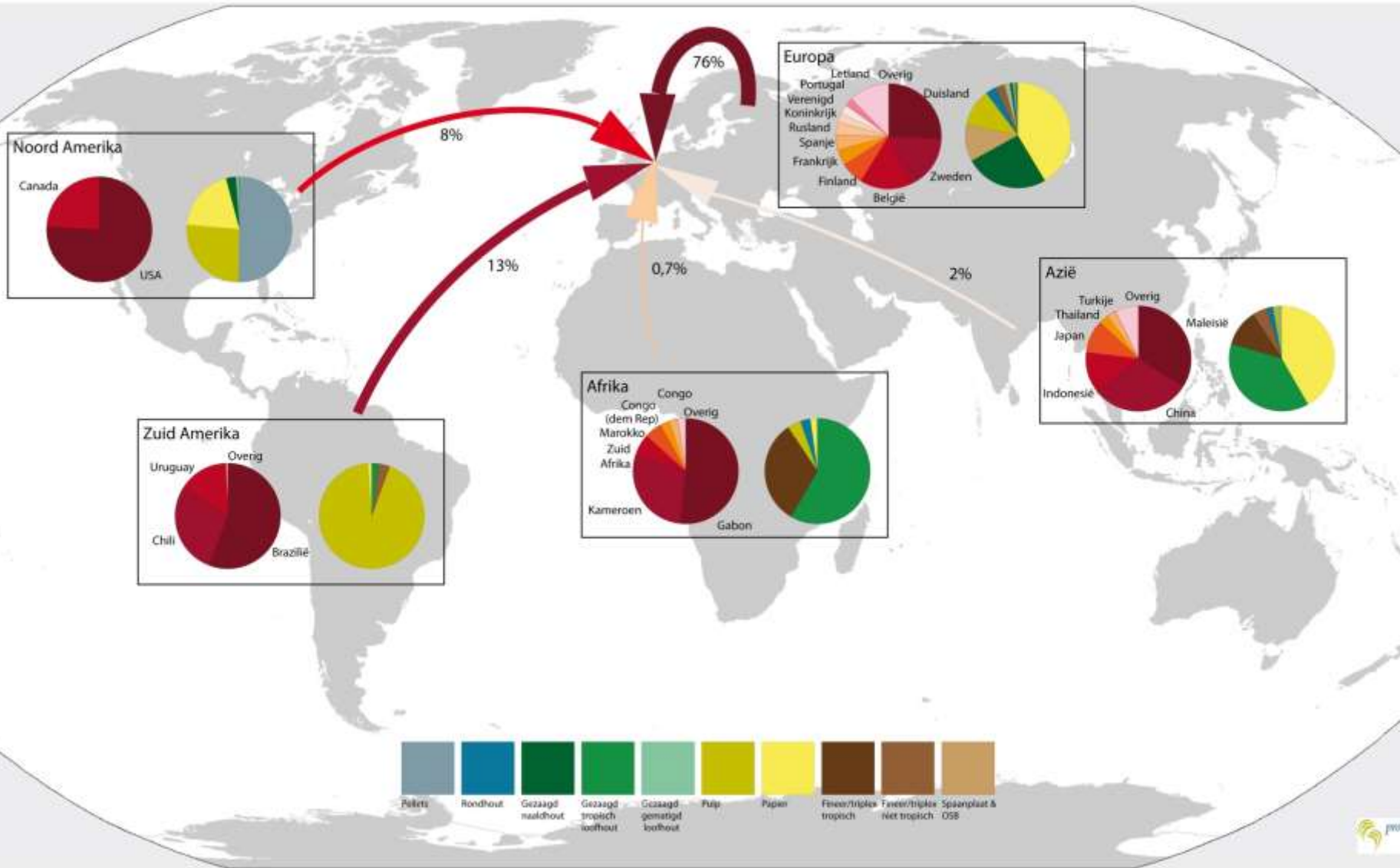


1.2 million m³ of timber each year

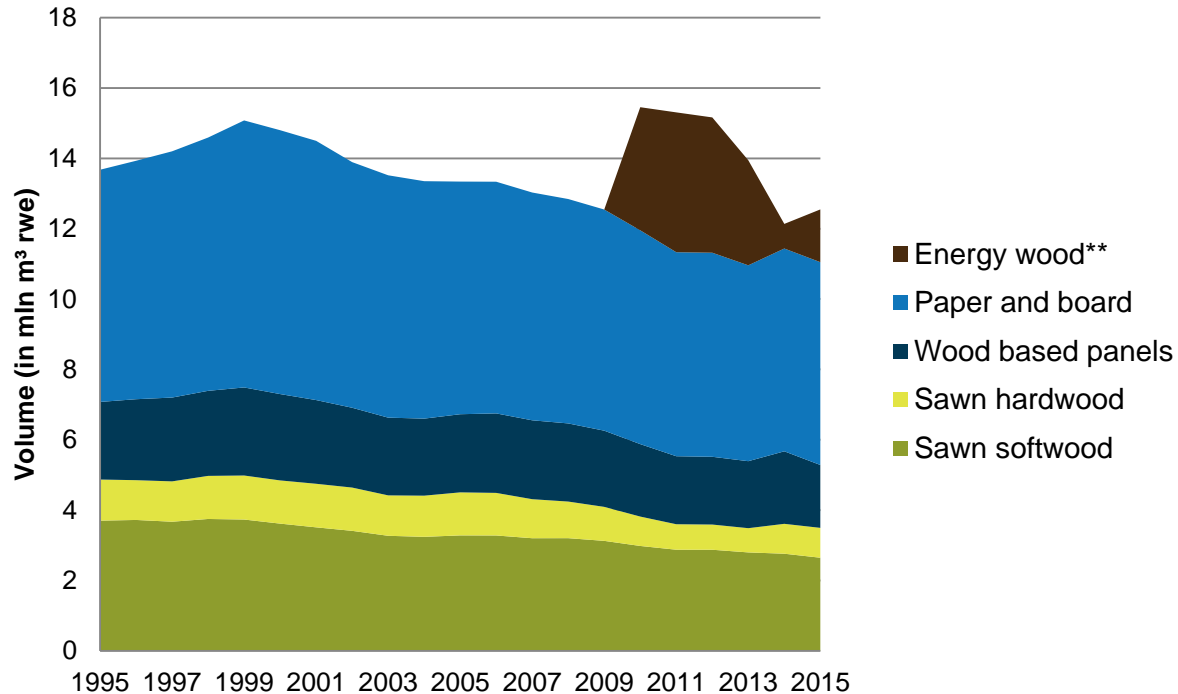
Dutch forests and forest sector

- Forest sector import driven
- 90% of the timber consumption from imports



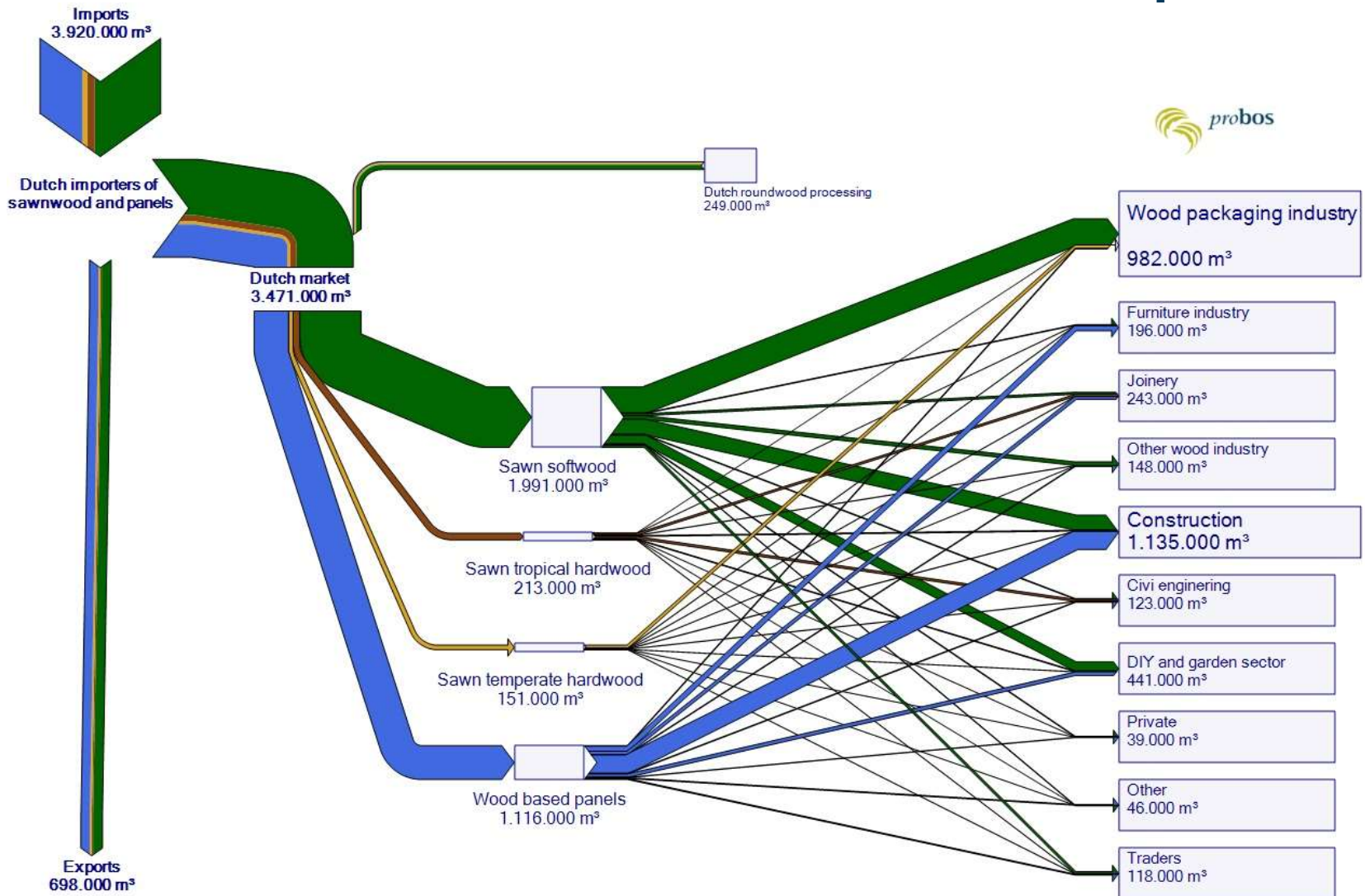


Consumption



- 0.9 m³/inhabitant. World average: 0.5 m³/inhabitant
- 83.3% of primary timber products is certified
- 65.6% for paper and board.

Sawnwood and wood based panels



Dutch wood packaging sector



30% of total consumption of sawn timber and wood based panels

- 45% for softwood
- 70% for hardwood

Dutch wood packaging sector

62 % of imports are certified
(FSC or PEFC)

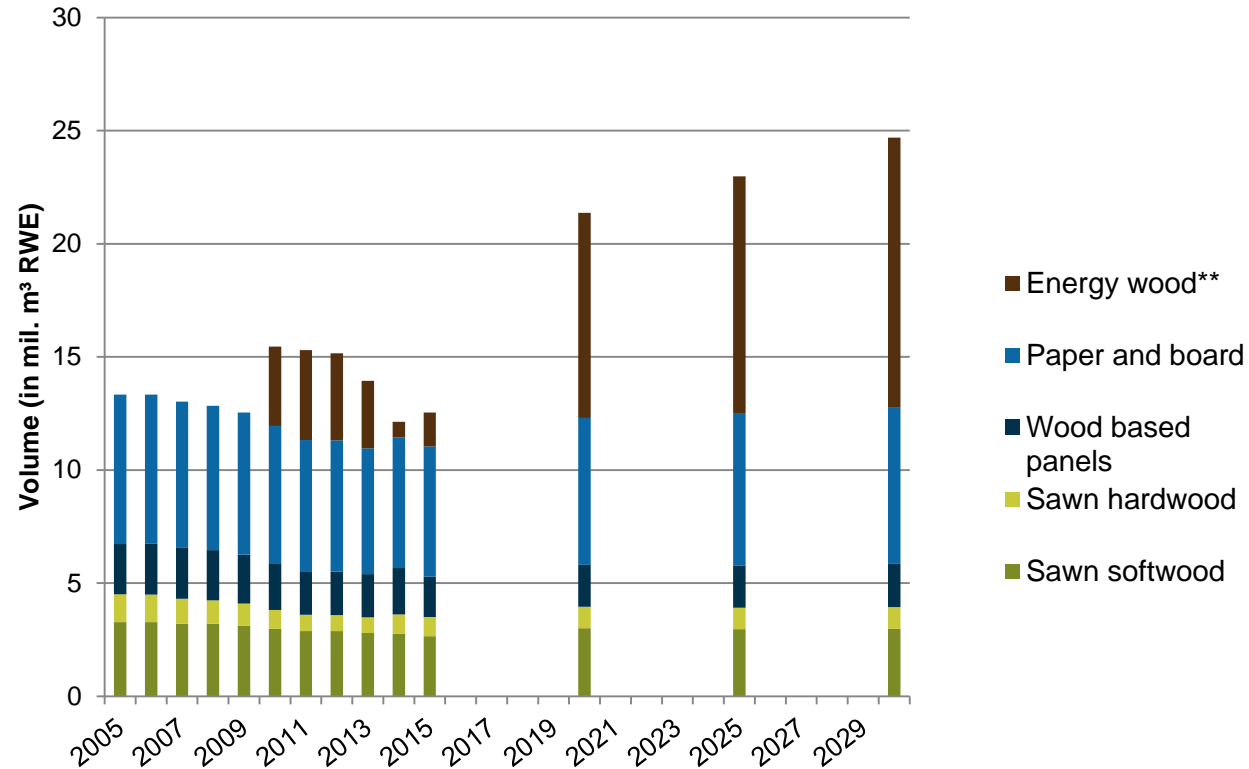


Lagging behind
compared to the
total market share,
but front runner
in Europe!

Scenario's until 2030

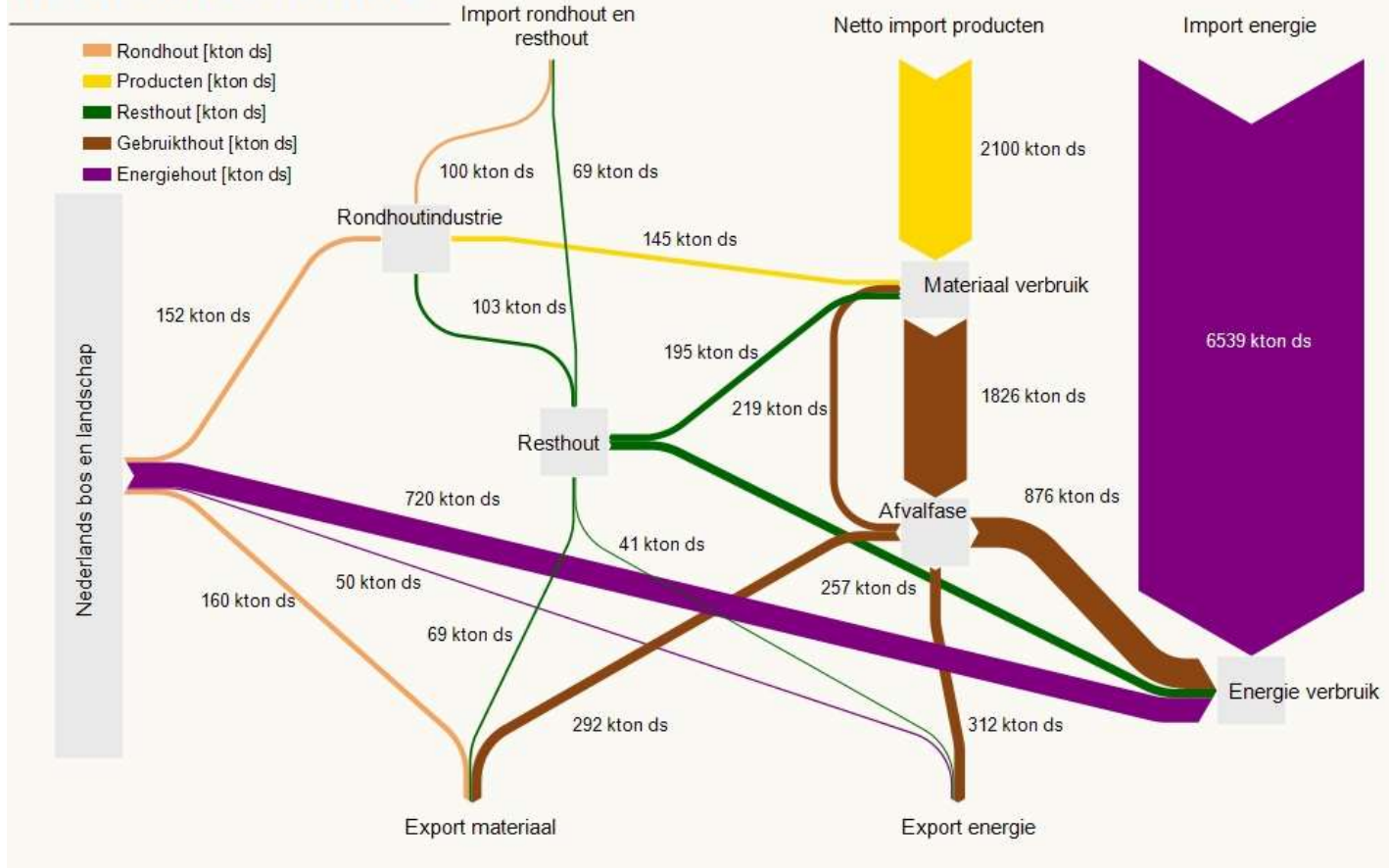
- Scenario study
- Reference scenario
- Total demand in 2030: 25 million m³/yr (EFSOS II)

Future timber demand

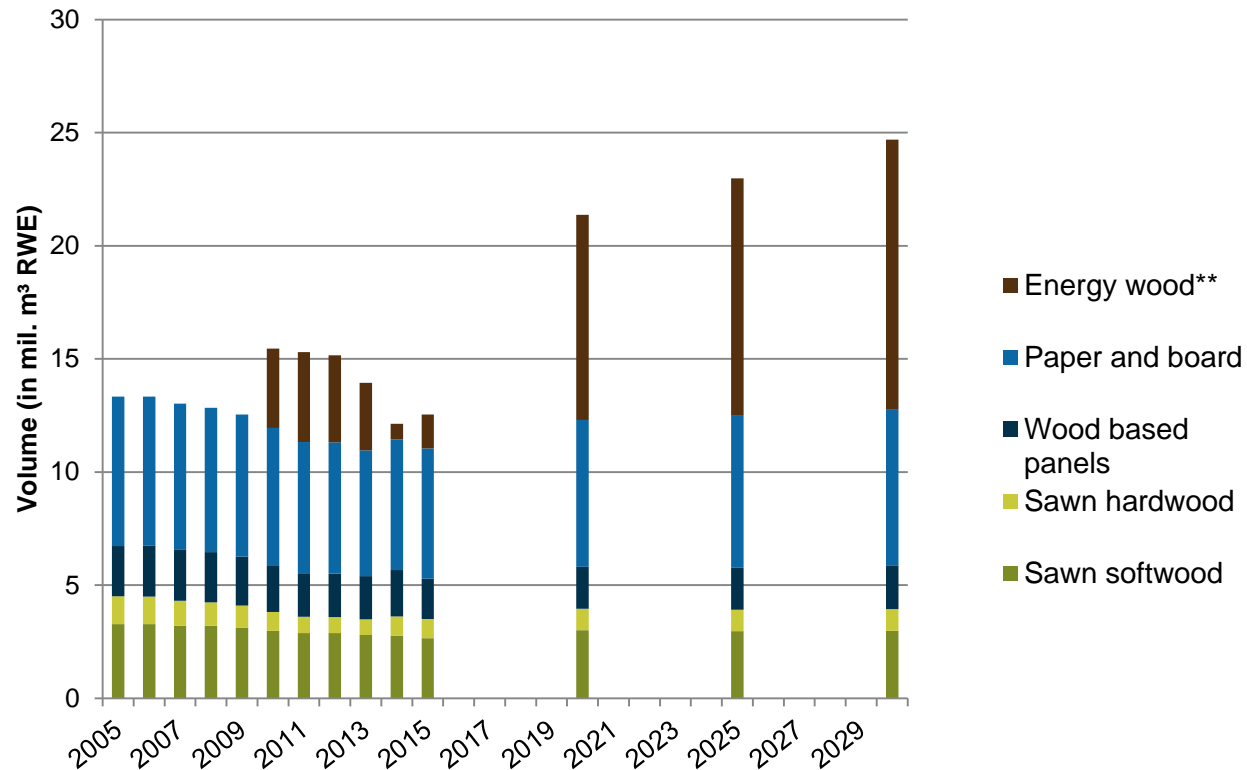


Reference scenario

Referentiescenario

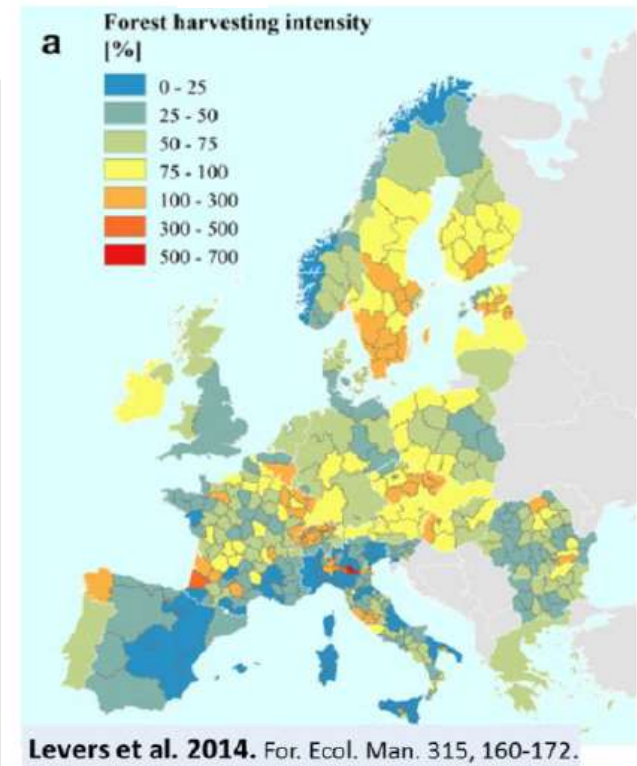
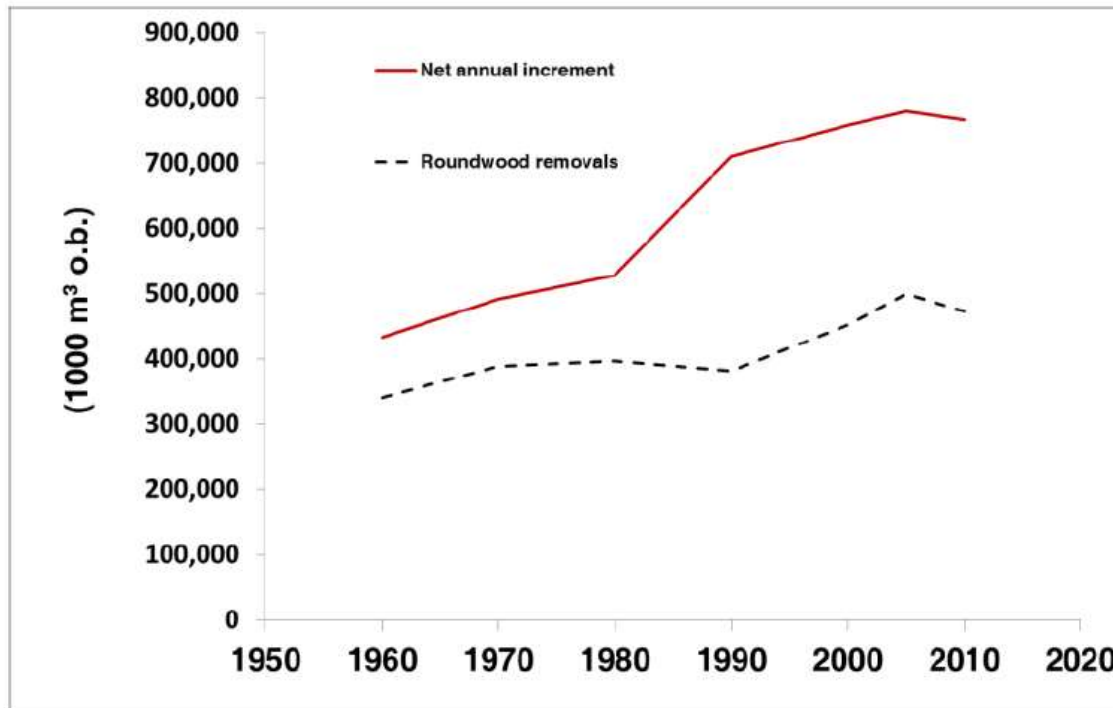


Future timber demand



Every EU member state does have such a development in demand!

Wood availability in Europe

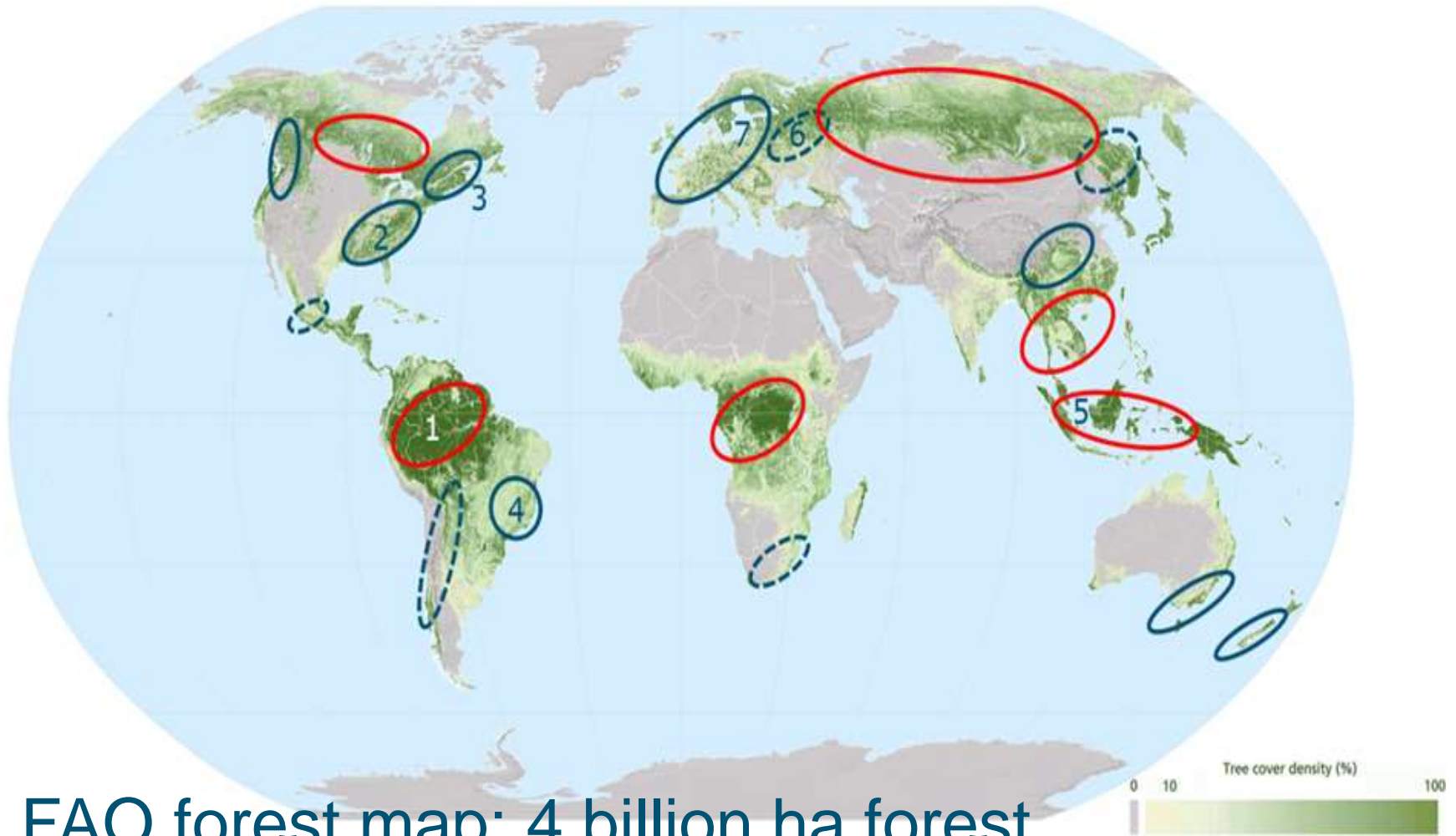


Additional:

80- 130 million m³/yr from European forest

100 million m³/yr from afforestation of abandoned agricultural lands

World forest and availability



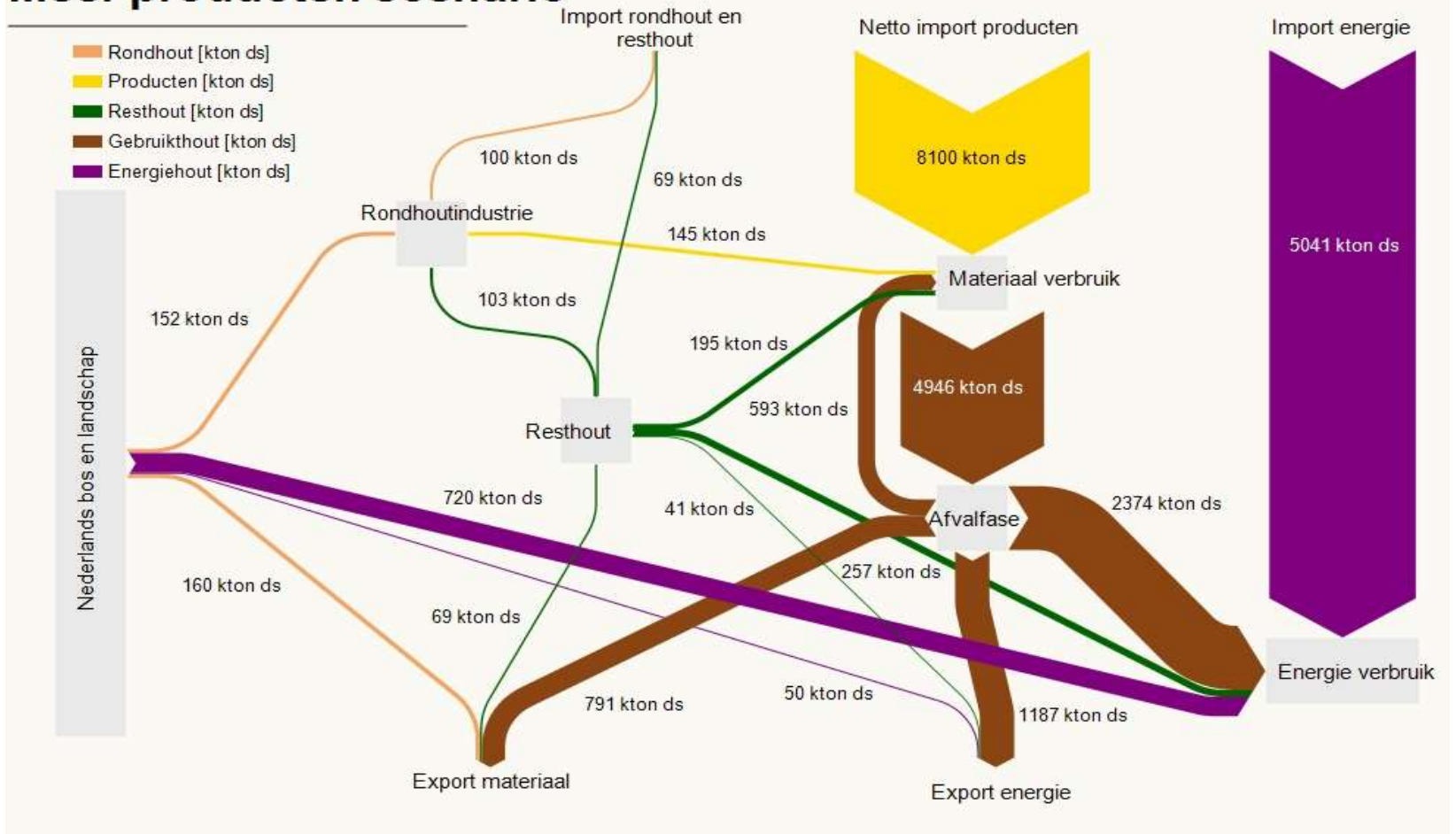
FAO forest map: 4 billion ha forest
Small area's where production increase is possible

Higher resource efficiency

- Resource efficiency and cascading
- Total demand in 2030: 40 million m³/yr (Biomass 2030)

Higher resource efficiency

Meer producten scenario



Concluding remarks

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Ambitions of the bio-economy in the Netherlands can only be met through:

- Investments in forest management globally
- Much improved resource efficiency
- Improved value chains
- Other forest values can in that case be maintained



THANK YOU!

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