



# Forest resources, forest products trade and forest policy in the GMS



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11 November 2010



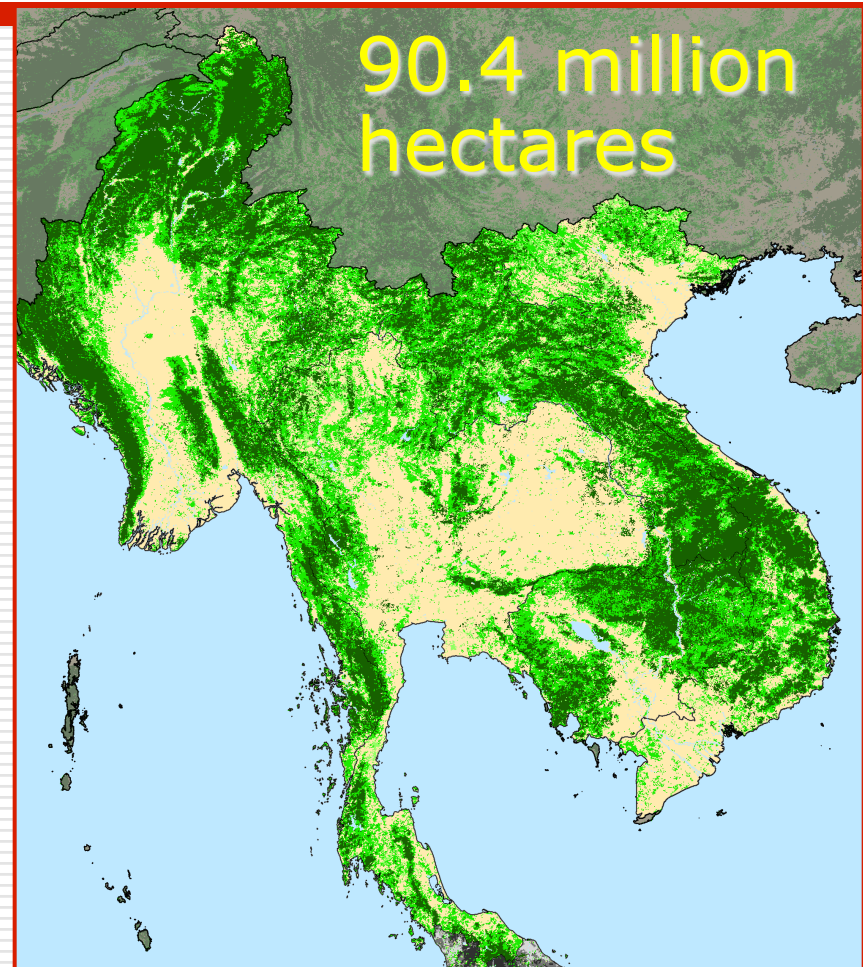
# Presentation outline

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- Forest resources
  - Forest products production
  - Forest products trade
  - Forest policy
  - The outlook for forestry to 2020
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# GMS forest cover 2010

- Cambodia (57%)
- Laos (68%)
- Myanmar (48%)
- Thailand (37%)
- Vietnam (44%)
- **GMS (48%)**





# Primary forests comprise...

**13% OF GMS FORESTS**

**19% OF ASIA-PACIFIC FORESTS**

**34% OF THE WORLD'S FORESTS**





# Other natural forests...

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**77% OF GMS FORESTS**

**65% OF ASIA-PACIFIC FORESTS**

**60% OF THE WORLD'S FORESTS**



# Planted forests...

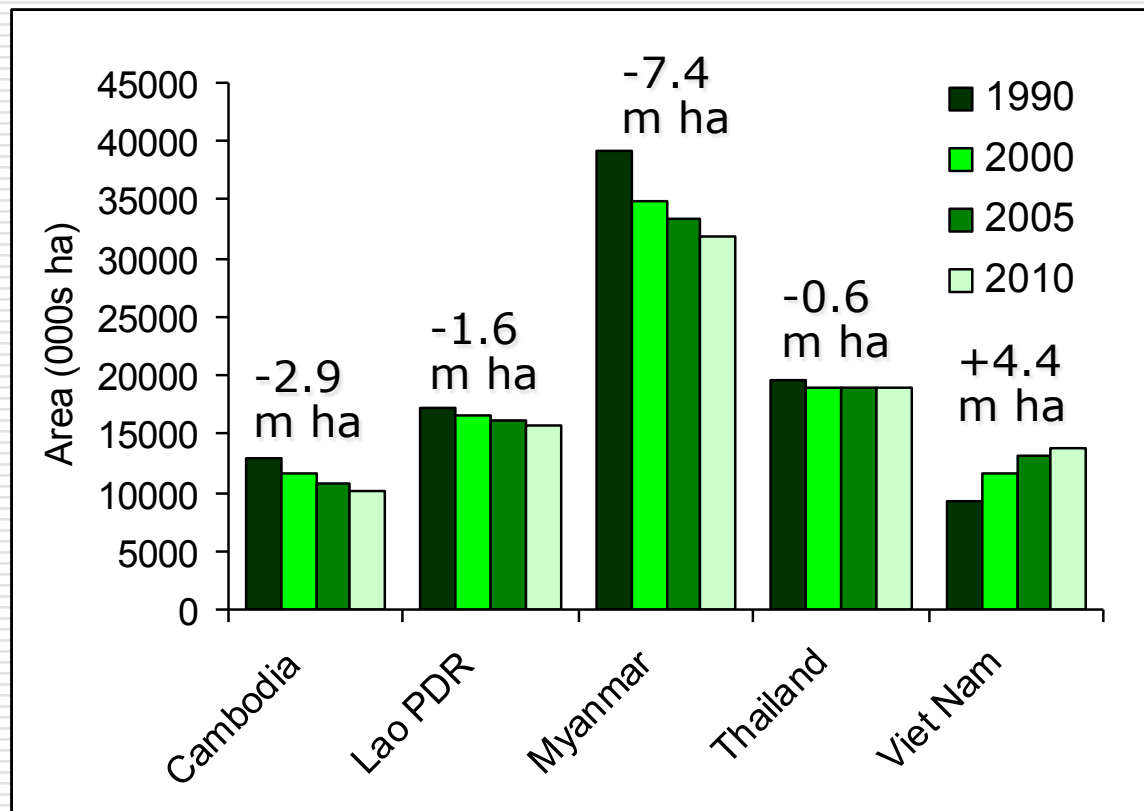
**10% OF GMS FORESTS**

**16% OF ASIA-PACIFIC FORESTS**

**7% OF THE WORLD'S FORESTS**

# Forest resources 1990-2010

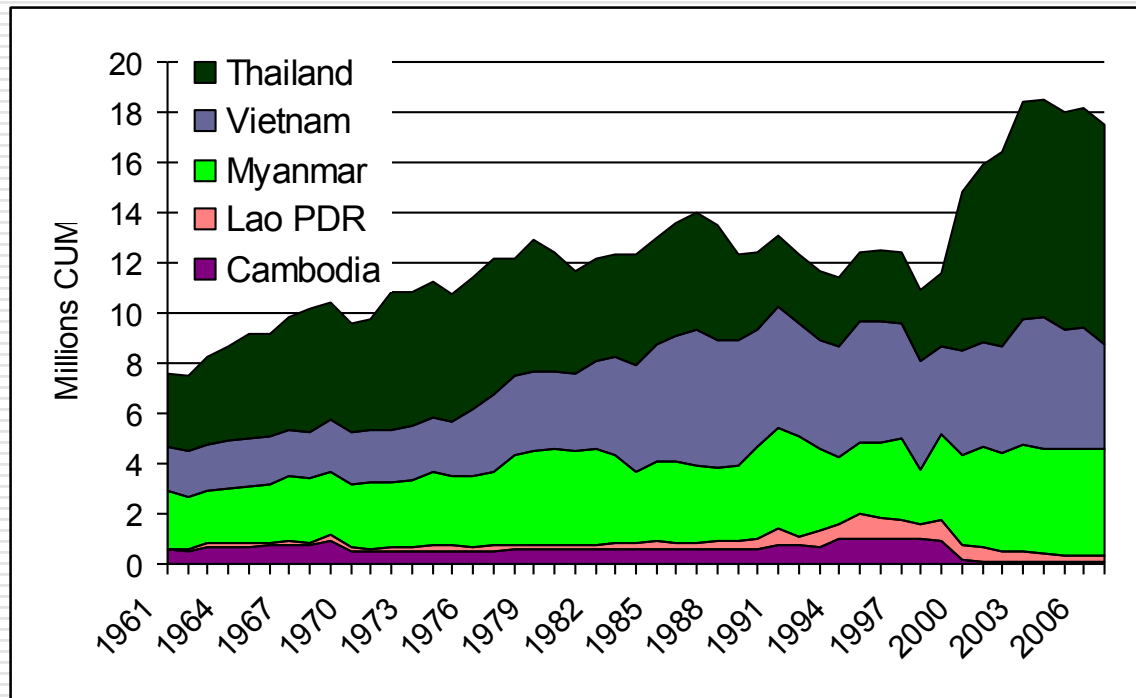
Demands rising, resources declining



# Wood production 1961-2007

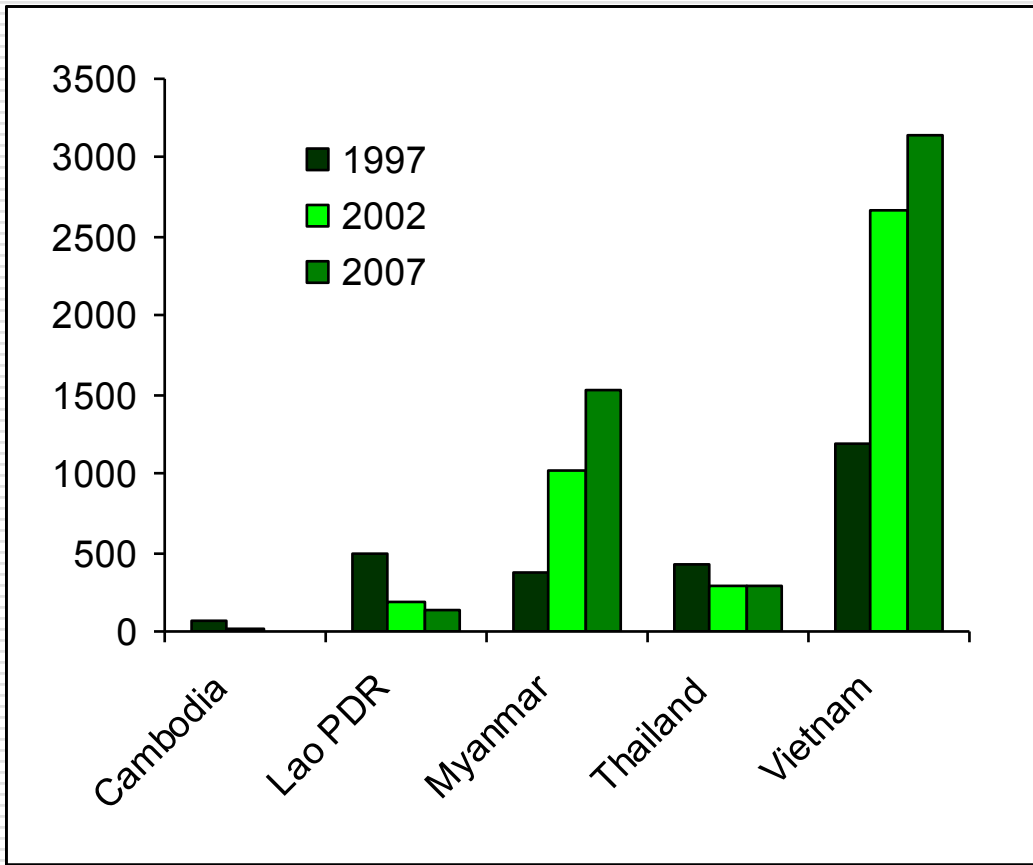
Industrial roundwood production rose after 2000.

Data quality poor, however.

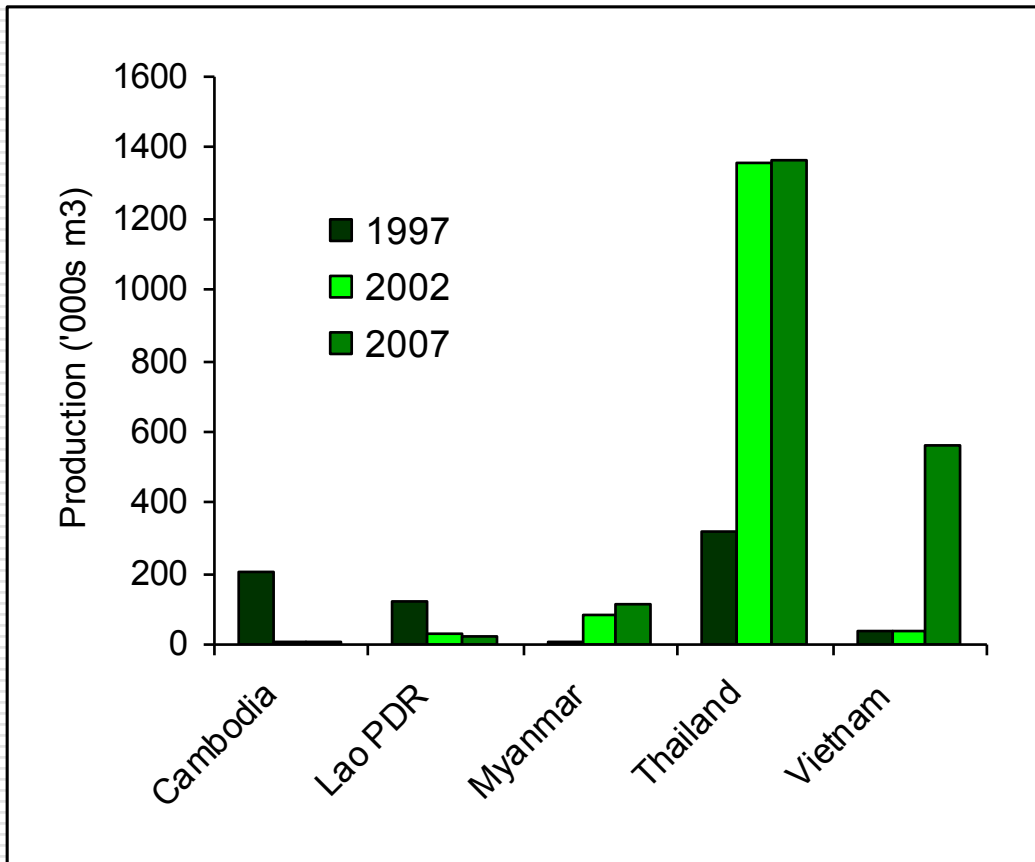




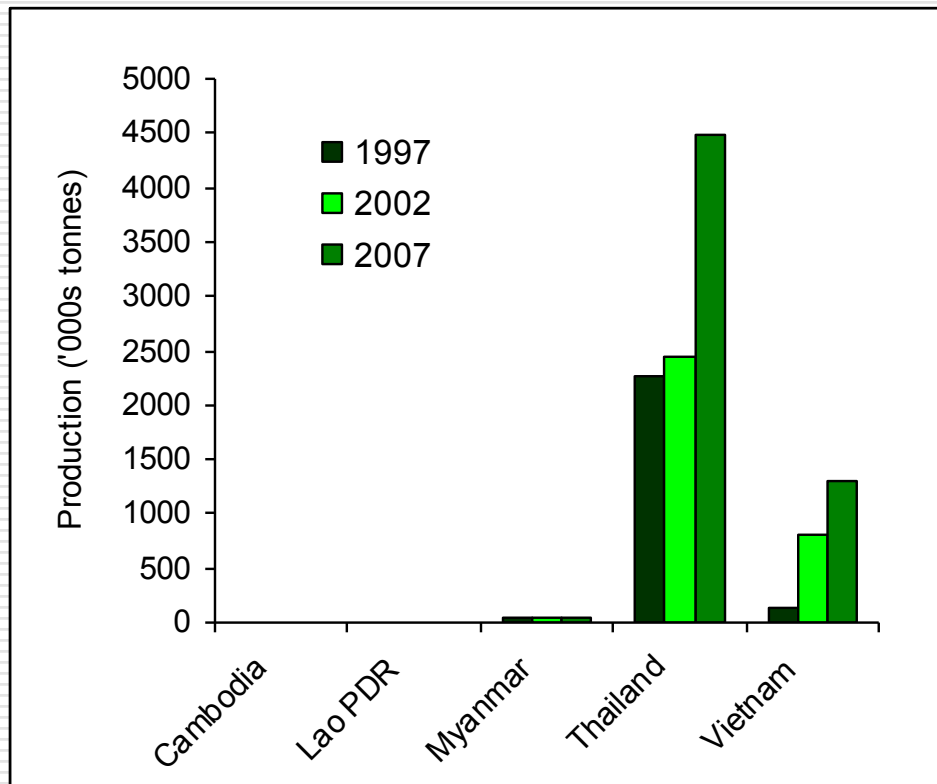
# Sawnwood production



# Panel production

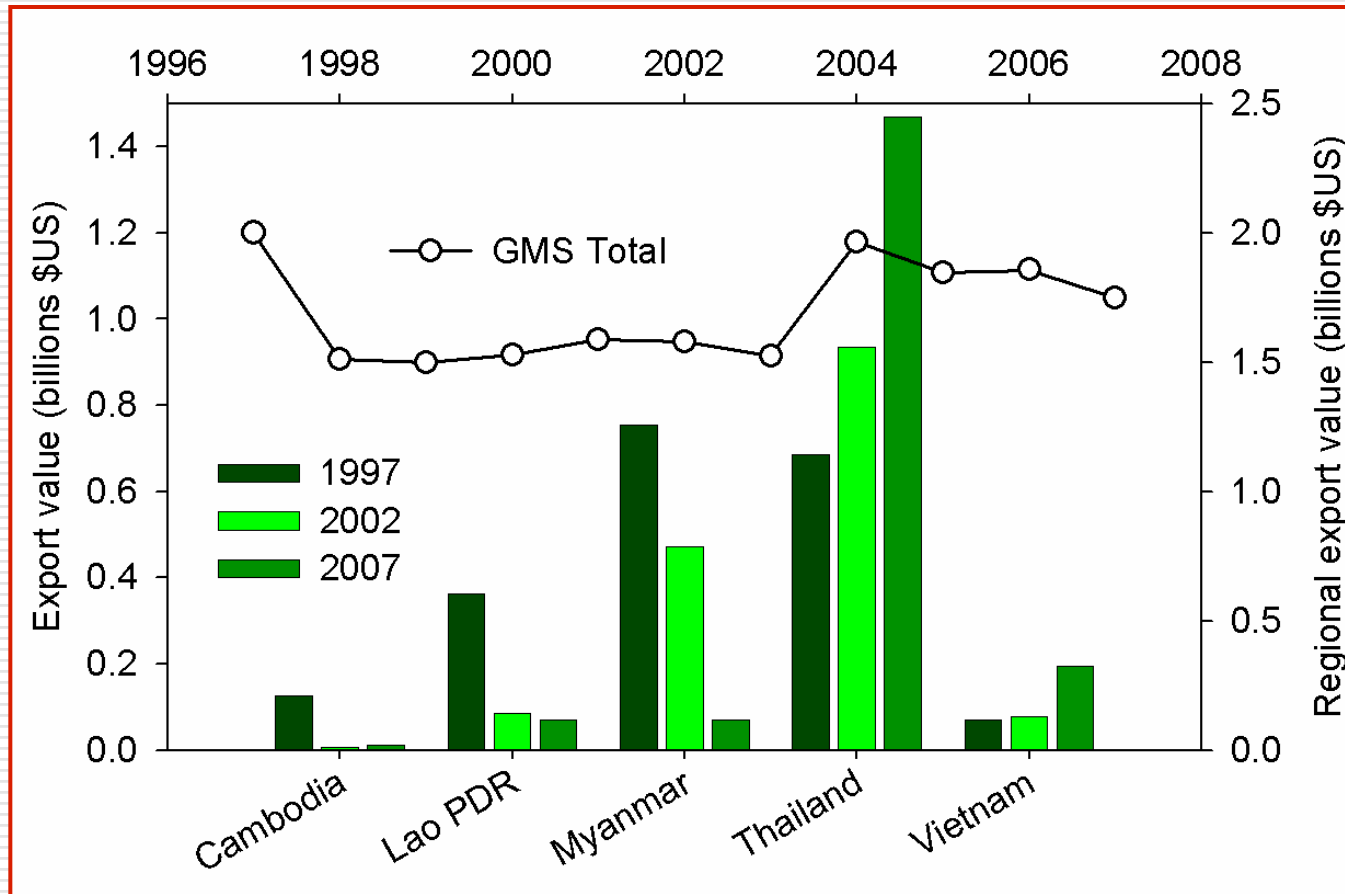


# Paper and paperboard production





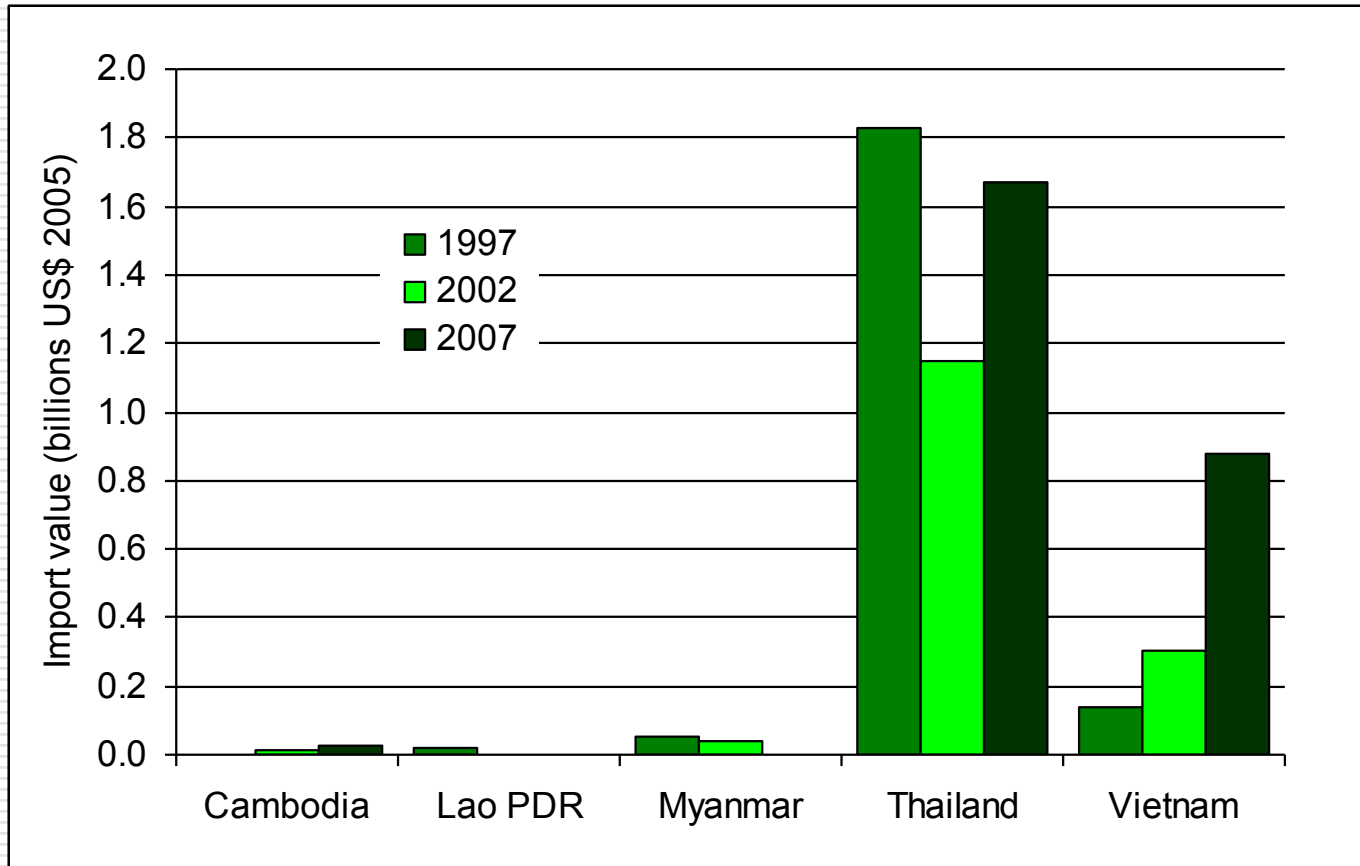
# GMS forest products export value



Source: FAOSTAT



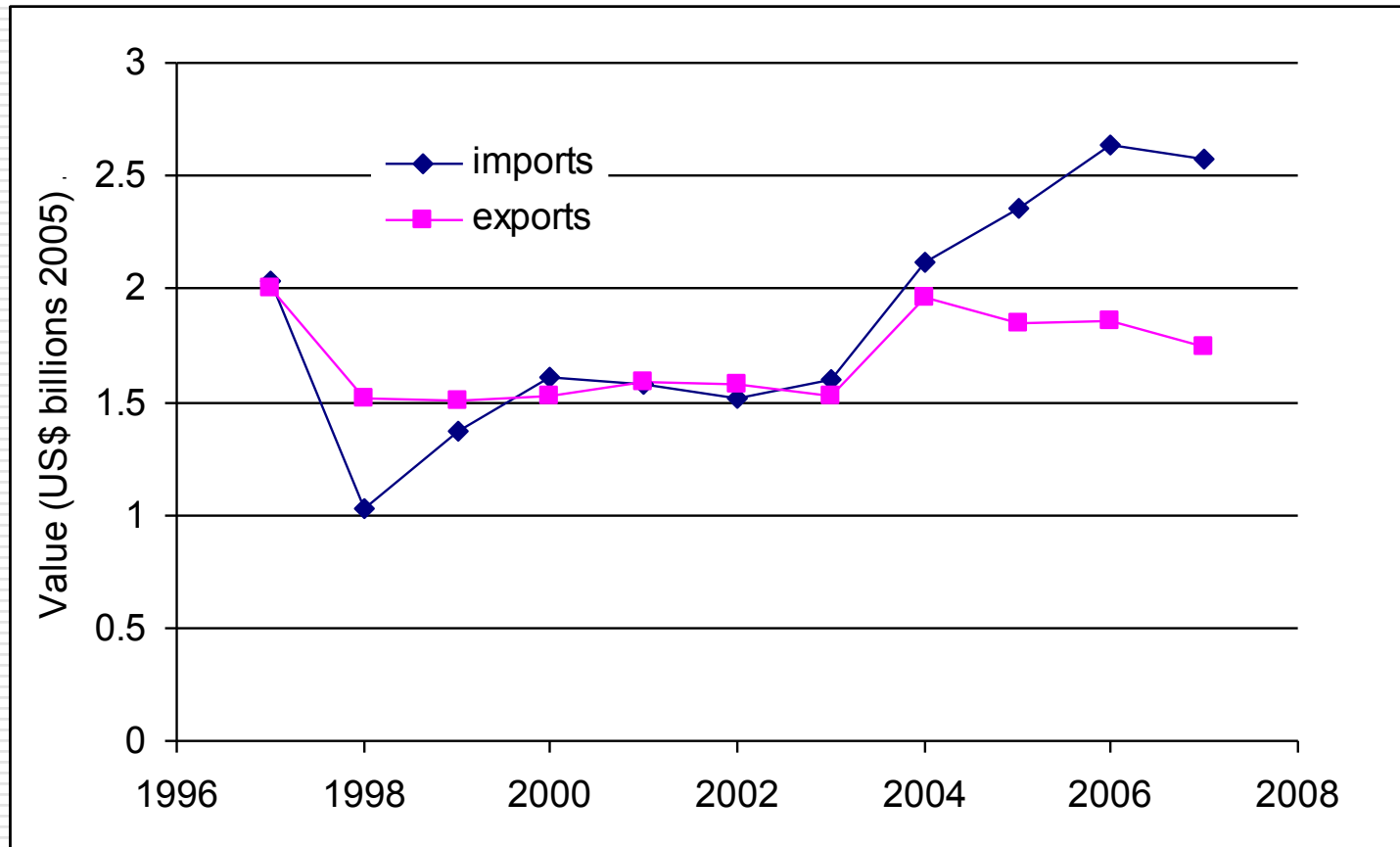
# GMS forest products import value



Source: FAOSTAT

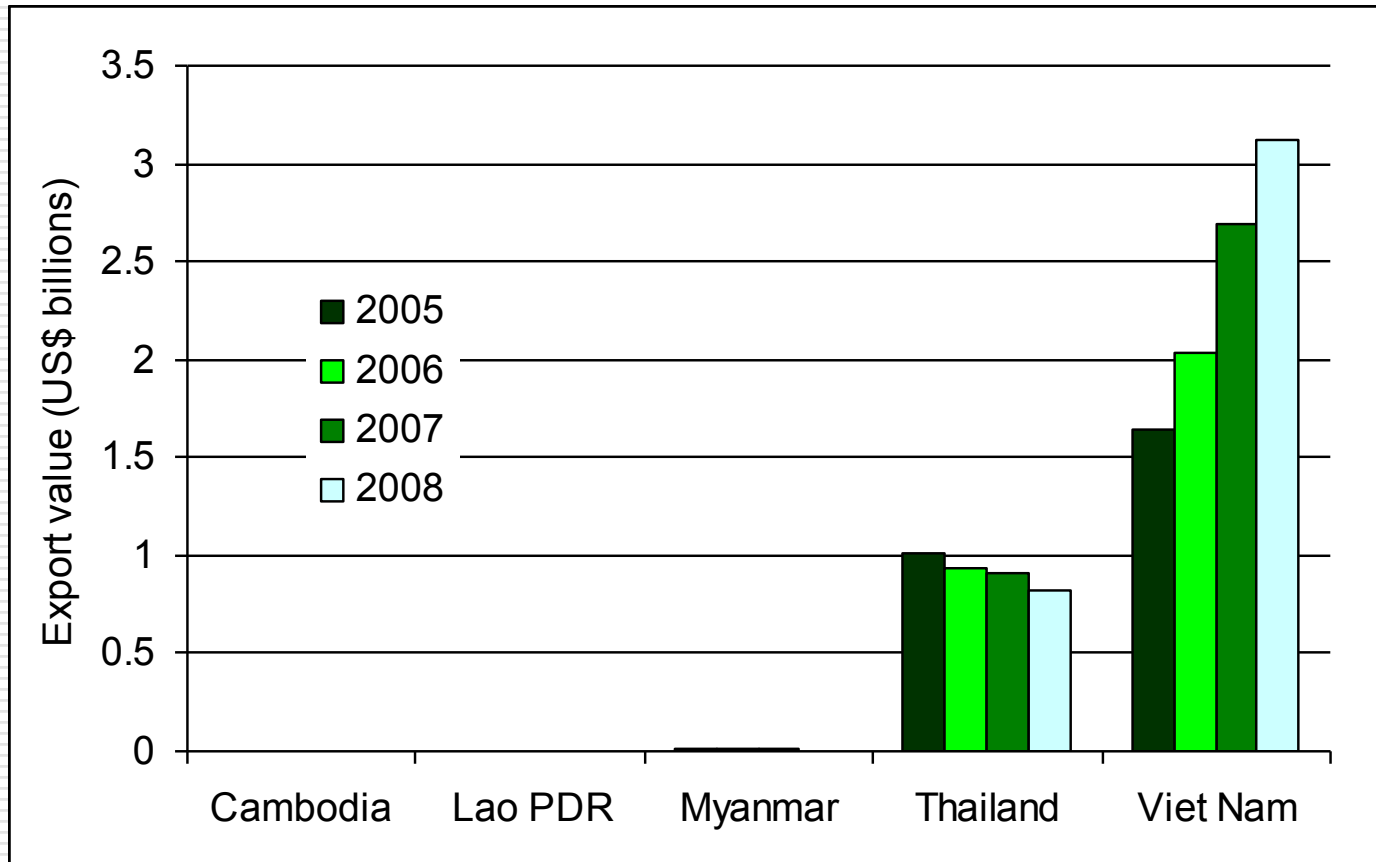


# GMS forest products trade balance



Source: FAOSTAT

# Wooden furniture export value (reported by partners)



Source: COMTRADE



# General forest policy trends

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- ❑ SFM has been at the centre of forest policy for >10 years in all countries
  - ❑ Logging bans and log export bans have proliferated
  - ❑ Greater attention to forest conservation/ environmental services
  - ❑ FLEG/T efforts expanding
  - ❑ More attention to participation, decentralization?
  - ❑ Forest tenure reform
  - ❑ Forest rehabilitation
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# Forest policy - Cambodia

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- ❑ SFM is at the centre of forest policy
  - ❑ Moratorium on logging in 2001
  - ❑ New forest law in Cambodia (2002) provides basis for CF
  - ❑ 2006 Guideline on CF has supported ~400,000 ha community forests
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# Forest policy - Lao PDR

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FS 2020 targets include:

- ❑ natural regeneration and tree planting;
- ❑ providing forest products for domestic consumption;
- ❑ preserving species and habitats; and
- ❑ conserving environmental values.

Local development and community involvement is supported but forest law (2008) states *"The State shall not grant any individual or organization lease or concession of natural forest to undertake logging and harvesting of NTFP."*

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# Forest policy - Myanmar

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National forest master plan (2001-2030) covers:

- nature and environmental conservation,
- sustainable harvesting of teak,
- export of value-added wood and NWFPs.
- forest protection, regeneration & rehabilitation,
- watershed management,
- law enforcement, and
- promotion of fuelwood substitutes

Community Forestry Instruction (1995) has provided foundation for ~600 community forests.

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# Forest policy - Thailand

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National Forest Policy 1985 includes:

- SFM principles
- Environmental protection
- Control of fire and forest clearance
- Reforestation for production and protection

Logging ban in 1988 following floods and landslides

CF bill approved in 2007 allowing community forestry where settlement before 1993 and where communities can prove they can protect forests

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# Forest policy - Viet Nam

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Forest development strategy programmes (2006-2020):

- Sustainable Forest Management and Development;
- Forest Protection, Biodiversity Conservation and Environmental Service Development;
- Forest Product Processing and Trade;
- Research, Education, Training and Forestry Extension; and
- Renovating Forest Sector Institutions, Policy, Planning and Monitoring.

Several major forest restoration programmes implemented since 1998.

Legislation introduced in past decade to allocate land to households and individuals

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# Forest cover targets - progress

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## ↓ Moving away from targets:

- ↓ Lao PDR (target = 70%),
- ↓ Cambodia (target = 60%), and
- ↓ Myanmar (target = 50%).

## ↑ Moving towards targets

- ↑ Thailand (target = 40%), and
  - ↑ Viet Nam (target = 47%).
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# Progress towards SFM 2000-2010



	Cambodia		Lao PDR		Myanmar		Thailand		Viet Nam		GMS <sup>(2)</sup>		UNIT
	Annual change		Annual change		Annual change		Annual change		Annual change		Annual change		
	%	Absolute	%	Absolute	%	Absolute	%	Absolute	%	Absolute	%	Absolute	
<b>EXTENT OF FOREST RESOURCES</b>													
Area of forest	-1.3	-145	-0.5	-78	-0.9	-310	0.0	-3	1.6	207	-0.4	-329	1 000 ha
Area of other wooded land	-7.8	-17	1.5	68	0.2	41	-	-	-4.7	-69	0.1	23	1 000 ha
Growing stock of forests	-1.4	0	-0.5	0	-0.9	0	0.0	0	0.9	0	-0.5	-27	M m <sup>3</sup>
Carbon stock in forest biomass <sup>*</sup>	-1.5	-7	-0.5	-6	-0.9	-16	0.0	0	0.7	7	-0.4	-23	MT
<b>BIOLOGICAL DIVERSITY</b>													
Area of primary forest	-3.4	-13	0.0	0	0.0	0	0.0	0	-8.1	-11	-0.2	-24	1 000 ha
Area of forest designated for conservation of biodiversity	1.7	60	0.8	23	5.5	86	0.2	15	3.2	57	1.3	241	1 000 ha
Total forest area excluding area of planted forests	-1.3	-144	-0.6	-91	-1.0	-339	-0.6	-91	0.6	61	-0.7	-603	1 000 ha
<b>PRODUCTIVE FUNCTIONS OF FOREST RESOURCES</b>													
Area of forest designated for production	-3.7	-155	0.6	22	-2.2	-501	2.7	62	3.4	187	-1.0	-385	1 000 ha
Area of productive forest plantations <sup>**</sup>	-0.8	-1	33.3	15	5.3	25	0.1	1	6.8	75	3.1	115	1 000 ha
Total wood removals	-28.6	-41	-3.2	-12	0.9	32	-16.9	-11	-1.6	-50	-1.1	-0.1	M m <sup>3</sup>
<b>PROTECTIVE FUNCTIONS OF FORESTS</b>													
Area of forest designated for protection	57.1	55	-1.3	-124	-1.0	-15	2.1	25	-0.7	-37	-0.5	-96	1 000 ha
Area of protective forest plantations <sup>**</sup>	-	-	0.0	0	5.2	5	3.5	29	7.6	40	5.0	74.9	1 000 ha
<b>SOCIO-ECONOMIC FUNCTIONS OF FOREST RESOURCES</b>													
Area of forest under private ownership <sup>**</sup>	0.0 <sup>(1)</sup>	0 <sup>(1)</sup>	0.0 <sup>(1)</sup>	0 <sup>(1)</sup>	na <sup>(1)</sup>	3	1.0	20	25.1	201	6.7	223	1 000 ha

\* Forest carbon in living (above- and belowground) biomass

\*\* Trend between 1990-2005

1 No private forest in Cambodia and Lao PDR; none in Myanmar before 2005

2 Countries with no data available excluded from estimation of trends for GMS

- (dash) – no data available

0 or 0.0 – no change

= Positive change (greater than 0.5%)

= No major change (between -0.5 and 0.5%)

= Negative change (less than -0.5%)

Sources: FAO (2005a); FAO (2010).



# Drivers of change in forestry

- ❑ Economic development
- ❑ Demographic changes
- ❑ Infrastructure development
- ❑ Agricultural expansion
- ❑ Governance
- ❑ Technology
- ❑ Forest policy





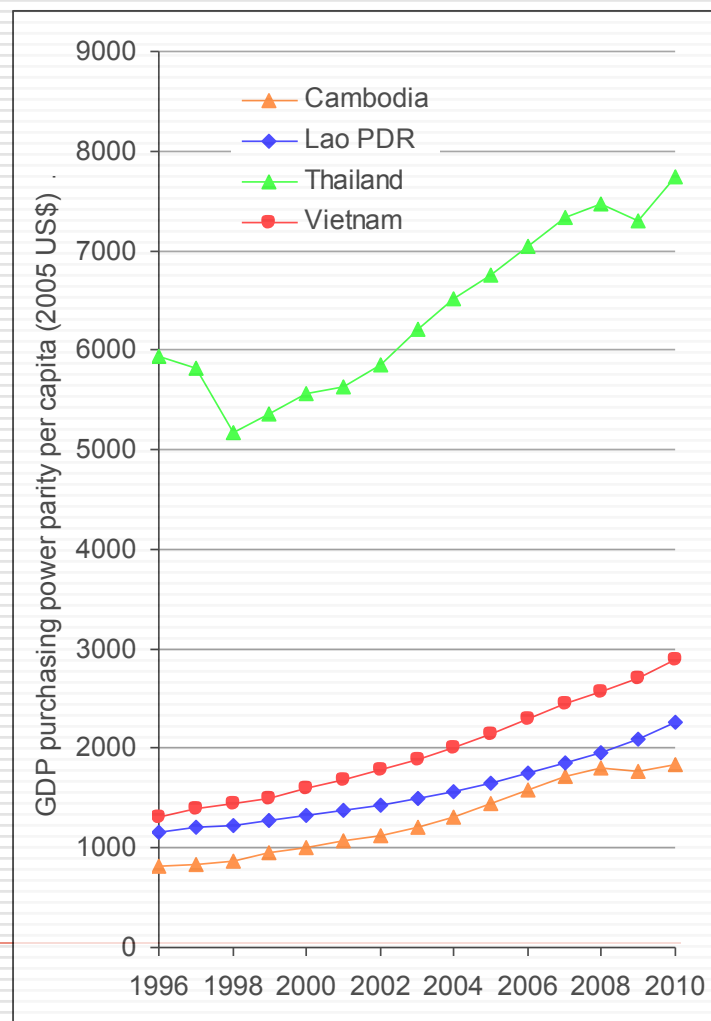
# GDP Per Capita at purchasing power parity



Recent reductions, export orientated countries hit hardest (Cambodia, Thailand)

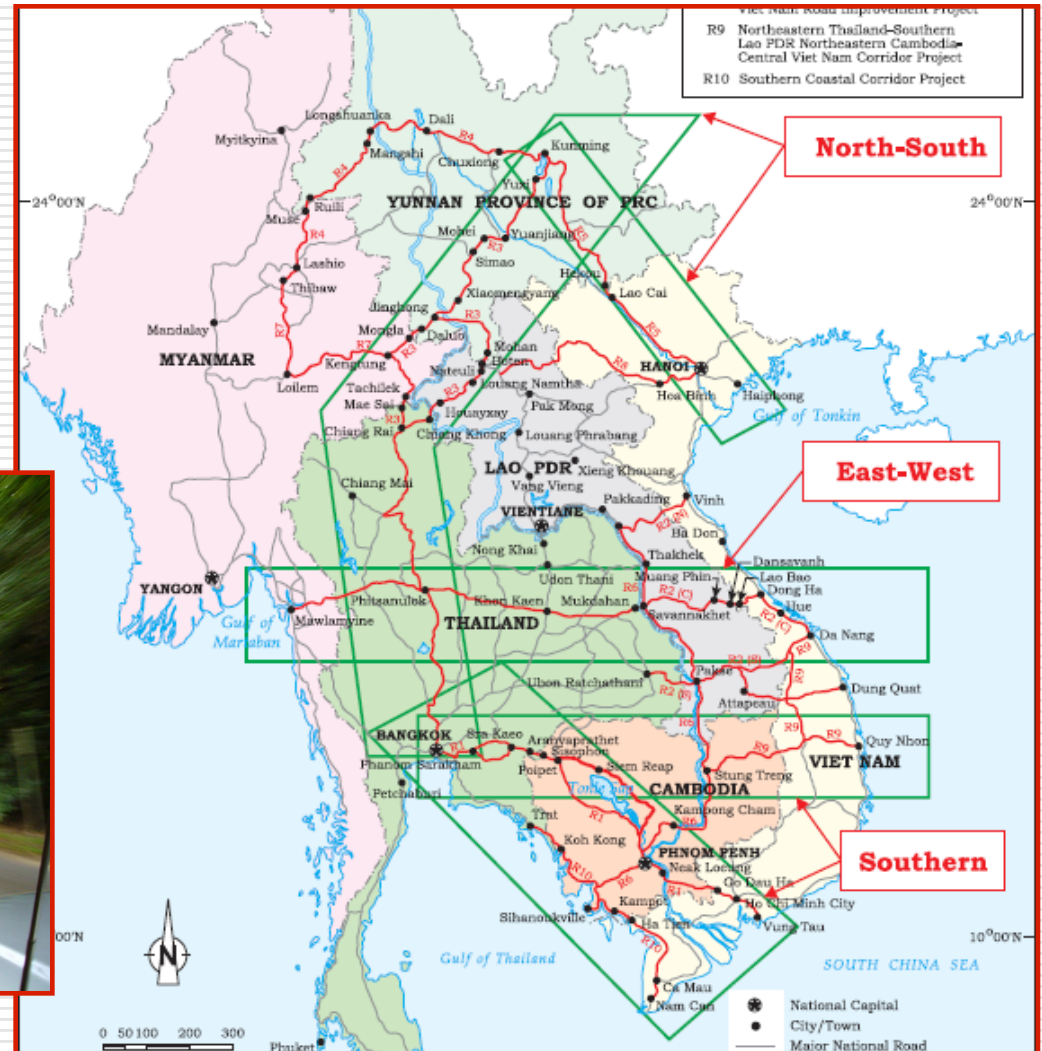
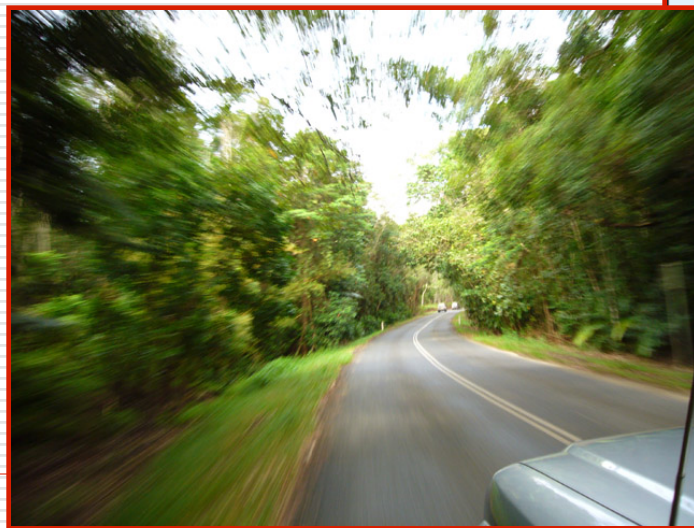
Wood products factories closing

Situation remains fluid – exchange rate fluctuations may still hit markets



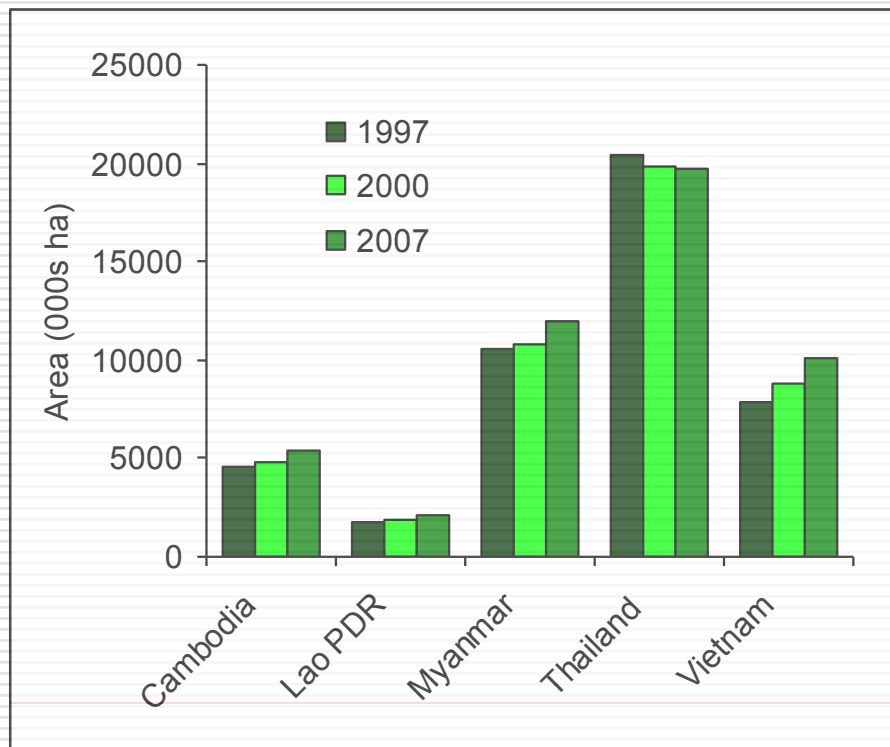
# Road development

Road network expansion greatest in Vietnam and Thailand



# Agricultural expansion

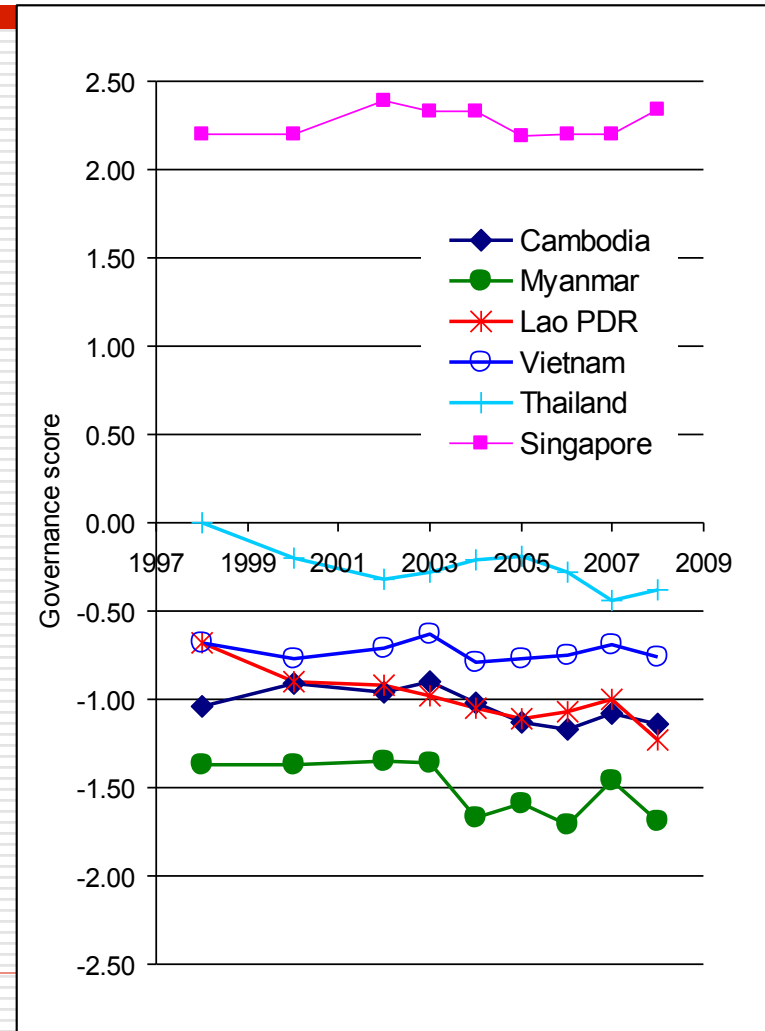
Rate of agricultural expansion in the GMS increased from 0.8% pa between 1997 and 2002 to 1.0% between 2002 and 2007





# Governance: Control of corruption

Corruption worsening in  
all countries

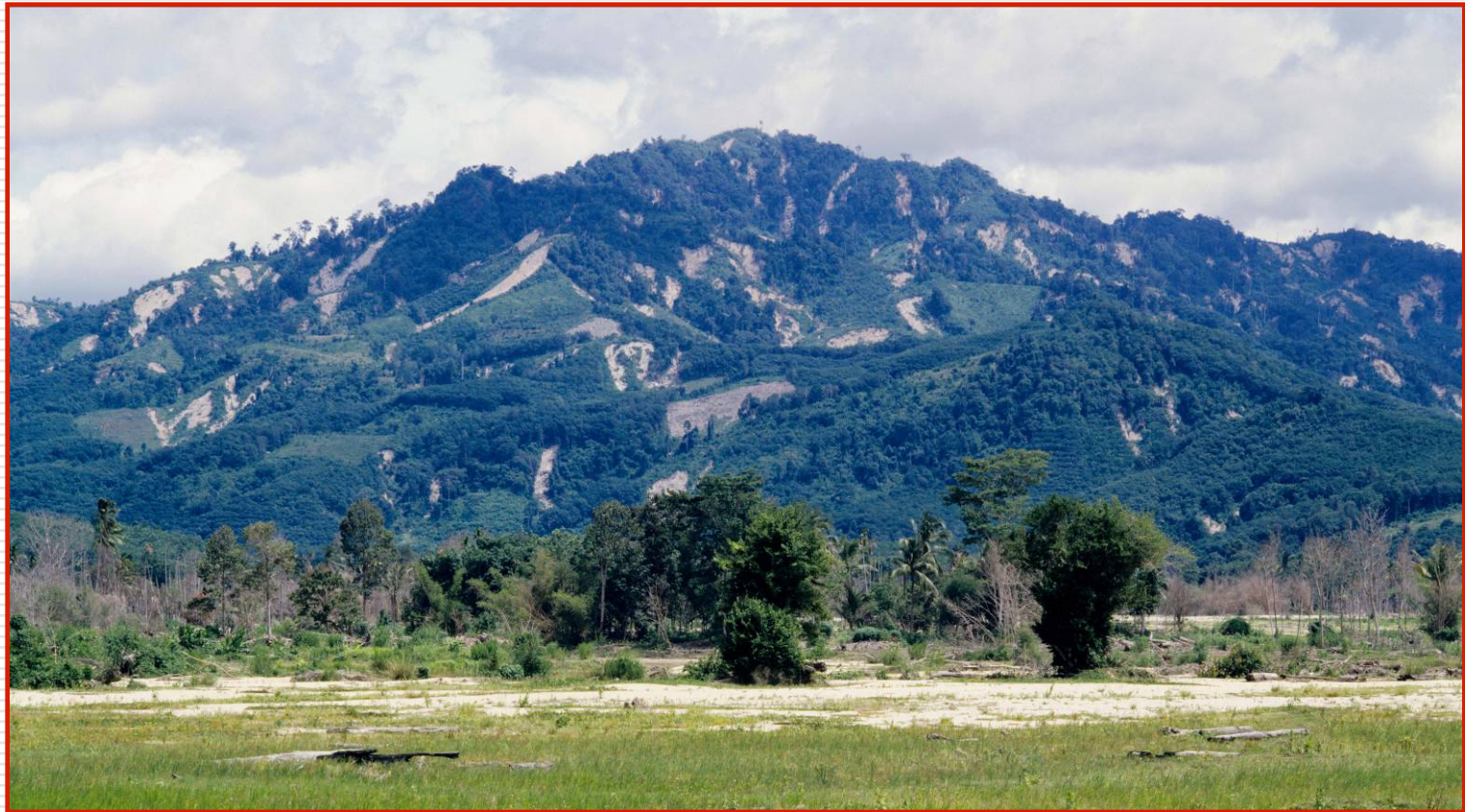


Source: World Bank Governance Indicators



# Policy changes

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# The future

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- Slowing deforestation
  - Expansion of plantations
  - Increasing timber importation, switch to wood substitutes
  - Overall loss of protective functions, biodiversity and carbon values?
  - What do GMS countries and the rest of the world want from forests and forestry in the GMS?
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EXTRA HIGH TIDE FLOODS ROAD  
RISING SEA LEVEL DOCUMENT