

ICFPA UPDATE 2015



INTERNATIONAL
COUNCIL OF
FOREST & PAPER
ASSOCIATIONS

Issue 15 - October 2015

TABLE OF CONTENT

Point of View - Challenges in spearheading the ICFPA	2
World Forestry Congress	2
ICFPA Annual Meeting	4
America's Corner	6
Asia's Corner	9
Europe's Corner	10
Calendar	13

Get Ready!

The importance of forest and their role in mitigation, adaptation and resilience to climate change was one of the topics discussed during the XIV World Forestry Congress, held in Durban, from September 7 to 11. Read more on page 2.



POINT OF VIEW

Challenges in spearheading the ICFPA



Elizabeth de Carvalhaes

The global forests products industry is experiencing a challenging moment with many opportunities to contribute towards global economic, social and environmental development.

I am truly honored to have been elected as the new ICFPA president at our annual meeting in Washington in May. On behalf of all ICFPA members, I would like to thank Donna Harman for her dedication to the ICFPA and congratulate her on the association's achievements under her leadership.

I am excited about working with the ICFPA members to guarantee a strong global forest products industry. This industry has an important role in supplying fibers, wood and energy for the world population.

It is an even bigger privilege to take on the leadership of the organization during a crucial period in which the industry will be summoned to take a very objective step towards its positive impacts, during a time where the world is fighting climate change.

The ICFPA will continue to act globally and advocate for policies that recognize the social, economic and environmental value of the global forestry base industry, by transforming a renewable and recyclable industry into products that meet the daily needs of the population.

We have a great opportunity to show the world the initiatives of the industry in the fields of sustainability, innovation, biotechnology, economic development, environmental protection, bioeconomy development and the fight against deforestation.

I am very excited about working with all of you for the next two years.

Elizabeth de Carvalhaes is the president of the ICFPA and CEO of the Brazilian Tree Industry (Ibá).

World Forestry Congress

Global agendas for sustainable development



The XIV World Forestry Congress (WFC), held September 7-11 in South Africa, gathered government representatives, the private sector, academia, NGOs and social movements to review, analyze and address the key topics related to forestry management and protection in the world. The event set the stage for the discussion of global agendas for sustainable development, and enabled the creation of new partnerships.

Some key topics discussed at the WFC included: 1) forest investments, not only financial investments, but also social and environmental investments made by the forest products industry in the world; 2) productive forests within the landscaping context, integrating farming areas with other soil uses, including food preservation and production to maintain food safety;

3) the need to restore natural ecosystems and the role of a production model to restore and maintain environmental services; 4) the role of forests in climate change mitigation and adaptation, and their resiliency.

Zero Deforestation Dialogue



On the first day of the WFC, FAO released its Forest Resource Assessment (FRA 2015), which shows that although global deforestation rates have decreased, it is still significant in many parts of the world. Among the Sustainable Development Goals (SDGs) related to sustainably manage forests, combat desertification, halt and reverse land degradation and halt biodiversity loss (SDG 15), is the goal to end deforestation by 2020.

Retailers from all over the world (including Unilever, Walmart, and other participants of the Consumers Goods Forum) have committed to zero deforestation production chains, which has raised skepticism within the global forest industry.

The feasibility of zero deforestation production chains was discussed in a debate organized by The Forest Dialogue (TFD), World Resources Institute (WRI) and World Business Council for Sustainable Development (WBCSD). Participants addressed opportunities and challenges of these commitments, including monitoring and audits, implications for small farmers and communities, and concept definition. It was concluded that voluntary private sector initiatives will only be carried if governments, other sectors, and public policies that encourage good management and fight illegal wood production are involved.

Members of the ICFPA Steering Committee met with the FAO Advisory Committee on Sustainable Forest-based Industries (ACSFI) to discuss zero deforestation production chains. The ICFPA will map the existing zero deforestation initiatives; synchronize definitions; identify opportunities and challenges for global understanding on the topic; and a better definition of the FAO's role to increase the effectiveness of commitments under sustainable Forestry Management and in the production sector.

Innovation and Investment Forum

FAO-ACSFI's Innovation and Investment Forum focused on forests and forest products innovations to alleviate global challenges related to climate change, water, energy, sustainable cities, decent housing, food security and packaging – all contributing directly and indirectly to the U.N. Sustainable Development Goals.

FAO-ACSFI presented its vision for the future, which includes increasing numbers of consumers who appreciate the need for sustainable forest management; responsible use of innovative forests-based products and services to fuel modern, low-carbon lifestyles; big and small forest growers and industries joining to create concrete and sustainable benefits.

ICFPA members gave examples of how forest-based innovations are breaking new ground to create opportunities towards a bioeconomy. Mr. Marco Mensink presented CEPI's Two Team Project, and Mrs. Elizabeth de Carvalhaes presented Ibà's projects on Innovative Governance on



Landscape Planning and Biotechnology. Other innovative projects and programs were presented by member companies of ICFPA member associations (including UPM, SAPPI, Stora Enso and Metsa Group). For a full list of panelists and speakers, visit <http://foris.fao.org/wfc2015/programme/session/55b206757abbed0405328f18>

Global Forest Products Industry Sponsors Awards Recognizing Student Architects



The ICFPA sponsored prizes to the student winners of the TREEHOUSING International Wood Design Competition, who were recognized at the WFC. The winning designs can be viewed at www.treehousing-competition.com.

In the Affordable Wood Housing category, Monica Wozniak of Poland won the student prize for her design Natural Wood Skin. The student prize in the Tall Wood Buildings category went to Tatiana Chaatziioannou of France and Soufiane Chibani of Germany for their design The Social Net Wood.

The ICFPA will continue its support of students and young professionals through its soon-to-be launched Blue Sky Young Researchers Innovation Award initiative, which aims to demonstrate the global forest products sector as a vibrant and dynamic workplace for the future.

ICFPA Annual Meeting

Global Forest Industry discuss sustainability

The ICFPA Annual Meeting was held in Washington D.C. on May 5. Representatives from 17 forest products associations from around the world and other guests participated in the meeting.

The topics discussed included biotechnology, climate change, sustainability, including the 2015 ICFPA Sustainability Progress Report, industry communication, and engagement in international industry forums. The ICFPA also approved a position statement on paper recycling. The statement calls for educating citizens on the importance of recycling, allowing the marketplace to determine recovered fiber's best end-use, and ensuring functioning waste markets while respecting national contexts and systems. Read the statement at <http://www.icfpa.org/uploads/Modules/Publications/icfpa-statement-on-paper-recycling.pdf>.

The ICFPA, the FAO Advisory Committee on Sustainable Forest-based Industries, and the World Business Council for Sustainable Development (WBCSD) agreed to align their work on the role of forests and the global forestry industry in mitigating climate change at the United Nations Conference on Climate Change (COP21) in Paris.

ICFPA members also agreed that FAO organize a stakeholder forum to discuss Genetically Modified Trees and help facilitate understanding and agreement on defining "deforestation free" and implication for the forest products value chain.

New ICFPA leadership



At the ICFPA Annual Meeting, Elizabeth de Carvalhaes, the CEO of the Brazilian Tree Industry (Ibá), was named ICFPA President for the next two years.

Elizabeth de Carvalhaes succeeds Donna Harman, president and CEO of the American Forest & Paper Association (AF&PA), who served as ICFPA President for the past three years.

“It has been a privilege to help the ICFPA continue its legacy of advocacy on important public policy issues for the global forest products industry,” said Harman. “In the past two years, we have expanded our advocacy reach with new and updated position statements and increased communications between national associations.”

“On behalf of the entire ICFPA, I would like to thank Donna for her leadership and guidance,” said Elizabeth de Carvalhaes. “I look forward to continuing to work with her to ensure a strong global forest products industry.”

Industry Global Meeting



The 7th ICFPA International CEO Roundtable, the global forest products industry’s most important meeting, was held in Washington, D.C. on May 7. Eighteen CEOs and association leaders from around the world took part in this biennial meeting, hosted by the ICFPA and organized by the American Forest & Paper Association (AF&PA). Mark Gardner, Sappi North America President & CEO and AF&PA Board Chairman, led the meeting in which participants addressed themes such as sustainability, climate change and biotechnology.

The meeting’s main topic was the repositioning and image of the global forest products industry. To encourage the debate, global branding expert Joey Reiman highlighted the importance of defining the original purpose of the industry. According to Reiman, that starting point will help the industry position itself as innovative, sustainable, appealing to young talent, and committed to renewable, recyclable, and carbon-neutral products.

CEOs made the following recommendations to the ICFPA:

- Study the original purpose of the forest products industry, in each country, and aim to define a global or regional purpose

56th ACSFI Meeting



The 56th Advisory Committee on Sustainable Forest-based Industries (ACSFI) meeting took place on May 6. ACSFI is a FAO statutory body that aims to provide guidance on activities of the FAO Forestry Department on issues relevant to the industry and the private sector. The meeting brought together researchers, associations and companies from 13 countries.

Eduardo Rojas, FAO’s Assistant Director-General, presented an overview of activities and pointed out the cross-cutting nature of forestry topics in FAO’s agenda. The discussion also included topics such as the relationship between forests and water resources; the role of the industry in reducing food loss through production of sustainable packaging; and indicators that demonstrate the social value of forests.

Meeting participants discussed ways to engage the ICFPA and forest products manufacturers in the World Forestry Congress.



- Promote raising the quantity and quality of paper and paperboard recovery around the world
- Improve communication about the relevance of the global industry on several aspects
- Spark the interest of young talent in the forest products industry through the Blue Sky Young Research Program, an award for young researchers and students from ICFPA member countries and regions.

5th ICFPA Sustainability Progress Report

Presented at the CEO Roundtable in May 2015 and shows that the global sustainability performance of the forest product industry is improving, with all aggregate indicators for reporting associations showing progress.

In addition to reporting on performance, the Sustainability Progress Report illustrates how the forest and paper industry is supporting a green economy through resource efficiency, carbon sequestration, innovative technologies, bio-based products, and benefiting communities.

The full report is available at <http://www.icfpa.org/uploads/Modules/Publications/2015-icfpa-sustainability-progress-report.pdf>

AMERICA'S CORNER

Brazil – Brazilian Tree Industry – Ibá



Ibá has just released the video “The tree industry and the restoration of the Atlantic Forest”, produced in a unique partnership with the World Wide Fund for Nature (WWF) and the New Generation Plantations (NGP). The video shows examples of partnerships, with the integration between planted forests and beekeepers, who installed artificial honeycombs in between planted trees in a way that was not aggressive to the environment.

As the world will have nine billion inhabitants in 2050 and the demand for wood will increase three-fold; we must plant more and more efficiently. Therefore, integrating and recovering native forest areas will become evermore essential.

[Check it out](#)

Ibá 2015



Ibá released its publication Ibá 2015, which gathers the main industry indicators of the diverse segments of the planted trees production chain: wood panels, laminate flooring, pulp, paper, charcoal, energy forests and biomass. The report presents the main challenges of the industry, as well as its social and environmental contributions.

[Click here](#) to download the publication

Brazil Climate, Forests and Agriculture Coalition

Ibá joined trade associations, companies and civil society organizations in the Brazil Climate, Forests and Agriculture Coalition, launched June in São Paulo. The initiative aims to promote a new, competitive, inclusive low carbon economy.

The process to create the alliance began in December 2014 with the active participation of Ibá in the process to formulate a short-, medium- and long-term agenda and 17 proposals that detailed how Brazil could become the leader in a low carbon economy. Over fifty associations have been involved in drafting the document that was launched at the event.

The document establishes the goals and commitments that support the Federal Government in positioning Brazil as a lead player in the Climate Conference (COP21) negotiations in Paris in December 2015. COP21 is the short-term objective of the coalition is the COP21, but the movement's goals and proposals extend beyond Paris.

Canada – Forest Products Association of Canada – FPAC

TheGreenestWorkforce.ca



FPAC has been actively branding the Canadian forest products industry as a green and growing sector, looking to hire 60,000 new recruits by 2020. Their initiative TheGreenestWorkforce.ca is an online brand that features career opportunities and stories of employees in the

forest sector, providing proof that Life is Better Here in Canada's forest products industry. Stories featured include Eugene Cardinal, an aboriginal employee who has worked in the industry for over 20 years. He says, of working in the industry, "If you want to broaden your skills and advance your career, you definitely have a lot of opportunities." The website also features adventure stories from the Green Dream Interns, a set of 15 summer students who are working all across the country in various fields, from accounting to mechanical engineering. To learn more, visit www.TheGreenestWorkforce.ca.

JobLink

To ensure the forest sector hires 60,000 workers by the end of the decade, FPAC is developing a smart online method of tracking Labour Market Information across the country while also linking job seekers with employers. This JobLink tool is part of TheGreenestWorkforce initiative and will be launched in 2016. The data captured will provide real-time Labour Market needs regionally, provincially and nationally, while also providing Canadians with accurate employment forecasts and trends in the sector.

Skills Awards for Aboriginal Youth



FPAC and the Canadian Council of Forest Ministers (CCFM) are offering two Skills Awards for Aboriginal Youth as part of an effort to encourage more Aboriginal workers to consider a career in the forest sector.



The two awards will honor First Nations, Metis or Inuit individuals with strong academic standing who are committed to their field of study and to a job in the forest sector. The awards, both worth \$2,500, are targeted at youth from 18 to 30 who are now enrolled in a post-secondary program. For more information please visit: fpac.ca/youthaward

Aboriginal Business Leadership Award



FPAC and the Canadian Council for Aboriginal Business (CCAB) have opened nominations for the 2015 Aboriginal Business Leadership Award. This annual \$5,000 award recognizes and celebrates First Nations entrepreneurs for their success in a forest products business that demonstrates business leadership, exceptional environmental and safety performance and the delivery of high-quality products and services. The recipient should also demonstrate a strong, long-term commitment to the Aboriginal community, particularly in supporting Aboriginal employment. For more information please visit: fpac.ca/BusinessLeadershipAward.

Buyer's Guide



FPAC in partnership with PricewaterhouseCoopers (PwC) released an updated version of the Buyers' Guide, a document to help customers make well-informed purchasing decisions for wood and paper products.

The purpose of the Buyers' Guide is to provide practical advice to help ensure buying decisions go beyond the traditional concerns of price, quality and availability to also consider environmental and social impacts such as climate change, legality and certification. This Guide will help inform the growing number of companies who wish to adopt green procurement policies as part of their efforts to achieve their own sustainability goals. Please find the document at the following link: http://www.fpac.ca/publications/FPAC_Buyers_Guide.PDF

United States – American Forest & Paper Association – AF&PA

Launch of Paper and Packaging Board Campaign *How Life Unfolds™*

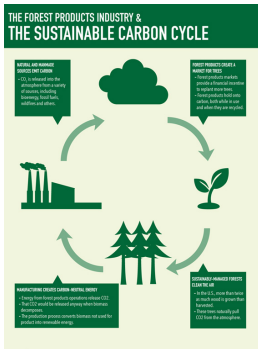


On July 8, the Paper & Packaging Board launched its consumer campaign *How Life Unfolds™*. [The Paper and Packaging Board](http://www.paperandpackagingboard.com) (P+PB) is financed by U.S. manufacturers and importers of printing and writing paper, Kraft packaging paper, containerboard and paperboard to generate consumer appreciation for paper and paper-based packaging.

The campaign includes 30-second commercials, print advertising, and a digital presence in banner ads, video and the campaign's information hub, www.howlifeunfolds.com. Social media platforms include [Facebook](https://www.facebook.com/paperandpackagingboard), [Twitter](https://twitter.com/paperandpackagingboard), [LinkedIn](https://www.linkedin.com/company/paperandpackagingboard) and [YouTube](https://www.youtube.com/paperandpackagingboard).

We invite you to check out the campaign and to share it with your audiences.

Biomass101.org Corrects the Record on False Information



Biomass101.org ensures the public receives scientifically sound information about carbon-neutral biomass. It was created by a coalition that represents every facet of the forest products industry, including AF&PA, the American Wood Council, the Forest Resources Association, and the National Alliance of Forest Owners.

Available on the website are blog posts, infographics, videos and other digital media content that corrects false or distorted information about biomass in the press and highlights the benefits of wood biomass as a renewable fiber source for both products and bioenergy. The effort also has a social media presence on [Twitter](#), [Facebook](#), and [YouTube](#).

ASIA'S CORNER

China – China Paper Association – CPA

Annual Report

CPA published its 2014 Annual Report on May 12, 2015. Based on surveys by CPA, the total production of paper and paperboard in China (mainland) was 104.7 million metric tons, and the consumption was 100.71 million metric tons.

The recovery rate for recovered paper has increased year over year, reaching 48.07% in 2014. The utilization rate was 72.5% in 2014 for every RMB 10,000 industrial output (at current price), there were 7.6 kilos of COD discharged.

China Paper Week

CPA will host “China Paper Week 2015” in the city of Haikou in the second week on November. Every year, more than 30 thousand people attend this industry conference. The program includes an international paper and equipment exhibition, a China paper trade fair, and a series of symposiums discussing the latest trends in China’s paper business and technology reformation. With over decades of operation, this annual convention has been recognized domestically and internationally as the most influential event in Chinese paper industry.

Japan – Japan Paper Association – JPA

Japan library



The Japanese government launched the “[JAPAN LIBRARY](#)” project in 2014. JAPAN LIBRARY aims to create opportunities for people all over the world to discover a wide-range of Japanese books on topics such as culture, philosophy, politics and science & technology by offering them in English. One hundred titles will be translated into English and donated to overseas universities and public libraries by 2020, when Japan hosts the Olympic Games.

In March 2015, the first five titles were published, included the book “Saving the Mill – The amazing recovery of one of Japan’s largest paper mills following the 2011 earthquake and tsunami” by Ms. Ryoko Sasa.



Published in 2014, this work of non-fiction vividly depicts the determination of Nippon Paper Industries Co., Ltd. staff to recover the Ishinomaki Mill, which suffered catastrophic damage caused by the 2011 earthquake and tsunami. The book is recommended reading material for industry players all over the world. For more information about the project, please contact JPA.

EUROPE'S CORNER

Europe – Confederation of European Paper Industries – CEPI

European Pulp and Paper Industry - Key Statistics 2014 (imagem da capa do relatório)

CEPI released its 2014 Key Statistics, giving a clear picture of the industry's performance last year. The report includes data about production, consumption and the trade of pulp, paper and raw materials, as well as data on energy and environment. It shows an industry in full transformation, with the growth in output in the packaging sector and a more modest increase in hygiene paper production more than balancing out the continuous decline in the output of graphic paper. Here are the main highlights of the report:

- The production of paper and board in Europe decreased by 0.2% in 2014 compared to the previous year, after a cumulative decline of 4% between 2010 and 2013. It is now established at 91.1 million tonnes.
- Paper and board consumption rose by 0.9% compared to 2013 and totalled 77.1 million tonnes. This increase is particularly important because it comes after three consecutive years of decline. The EU28 and the euro area recovered in 2014, with the annual GDP thought to have increased by respectively 1.3% and 0.8% (source: Eurostat). This was reflected in the demand for paper.
- Graphic grades represented 40.5% of all paper and board produced in Europe, packaging grades 47.5%, sanitary and household papers 7.7%, and specialty grades 4.3%.
- Paper and board exports to countries outside CEPI dropped, causing concern, whilst imports rose, resulting in a slightly negative trade balance impact. However, CEPI countries maintained an overall positive trade balance in paper (exports exceeding imports) of 14.0 million tonnes in 2014 (14.8 million tonnes in 2013).
- Market pulp production fell by 1.4% compared to 2013, with an output of 13.2 million tonnes.

Download the report at: <http://www.cepi.org/system/files/public/documents/publications/statistics/2015/Key%20Statistics%202014%20FINAL.pdf>

ETS falls short of expectations

Mid-July, the European Commission launched the new proposal for the EU Emission Trading System (ETS), the largest industrial policy decision it will take in its entire mandate. The proposal has a number of good elements but falls short in its protection of energy intensive industries. Member states hold the key to the solution.

In October 2014, the European Council recognized that measures to protect energy intensive industry from carbon leakage should be maintained when revising the EU ETS. The Council concluded the most efficient installations in sectors such as the pulp and paper industry should not face undue carbon costs that would impact their global competitiveness.

Member states, however, added expectations on the revenues they want from the EU ETS. The proposal therefore fixes the share of auctioning vs. the share of free allocation. "The proposal

shows the member states cannot have their cake and eat it. If policy makers in Brussels and the member states are serious on growths and jobs, the fixed share of free allocation should be changed to really protect industry as agreed by the Heads of State”, said Marco Mensink, CEPI Director General. Learn more at: <http://www.cepi.org/node/19377>

Two Team winner gets EU funding

The PROVIDES consortium recently received a substantial subsidy from the Bio-based Industries Initiative (BBI). The consortium focuses on developing environmentally friendly alternatives to chemical solvents in the European pulp and paper industry by means of Deep Eutectic Solvents. Coordinated by ISPT, the industry-driven PROVIDES project is also financially supported by 18 industrial partners. The BBI subsidy means the project can go full steam ahead with the further development and industrial implementation of these innovative green processes.

The project is of high interest to the paper and pulp industry as it offers a new, environmentally-friendly technology to isolate high-quality cellulose fibres and lignin from lignocellulose. The innovative technology can potentially reduce CO2 emissions in the papermaking chain by 20%.

See more at: <http://www.cepi.org/node/19351>

Upcoming event: European Paper Week 2015, 17-19 November 2015



Registrations for the pulp and paper industry’s landmark event of the year are now open. Following the latest trends here in Brussels, this year’s theme is Paper Industry 4.0. We will look at how the digitalization of our society will influence our industry in the future, with high-level speakers including American economic and social theorist Jeremy Rifkin. Other highlights include a special exhibition with the 20 most innovative products in the industry and an update on the Two Team Project winning project, Deep Eutectic Solvents. Find out more at: www.cepi.org/epw.

Finland – Finnish Forest Industries Federation – FFIF

Environmental and responsibility effort yields results



The forest-based sector agreed on shared environmental and responsibility commitments in 2012. The industry made ten commitments and substantial progress has already been achieved in five of them.

One achievement involves raising the share of certified wood – 85% of the wood used by the sector in Finland now comes from certified forests. The target set for 2020 has thus already been exceeded by five percentage points. The goal of reducing landfill waste by 30% has also been reached. The factors behind this include, for example, new recycling objects and an increase in the energy utilisation of organic waste.

Furthermore, use of renewable energy has increased. Renewable energy accounted for 84% of the forest-based sector’s energy production in 2014, up from 78% in 2011.

Key objectives for the near future are, among other things, improving the living conditions of endangered species and promoting responsibility within delivery chains.



Germany – German Pulp and Paper Association – VDP

Survey – Image of the Paper



VDP conducted an online survey to determine the impression young people, aged 15 to 26, have of paper and the paper industry as a workplace. The results: Paper as a product is seen as important and valuable. The paper industry is assessed positively overall: it is considered to be solid and – thanks to paper recycling – environmentally friendly. Environmental concerns about paper play virtually no role anymore.

Jobs in industrial production are associated with stressful working conditions, often due to ignorance. This unfortunately includes the paper industry, which is not seen as a top choice when thinking about job opportunities. Pay and a positive working environment top the list of qualities desired in a career, and the paper industry could be attractive in those respects.

Paper industry employees play a strong role in the decisions of young people to join the industry. But it appears they do not portray the industry positively. A few interviewees stated that they know someone who works in the paper industry, and reported that they had not given a favorable impression.

Calendar

MIAC - International Exhibition of Paper Industry
October 14 to 16, 2015
Lucca, Italy
<http://www.miac.info/>

EXPOCORMA 2015
November 18 to 20, 2015
Coronel, Chile
<http://www.expocorma.cl/>

European Paper Week 2015
November 17 to 19, 2015
Brussels, Belgium
<http://www.cepi.org/epw>

COP21 – UN Climate Change Conference
November, 30, to December, 11, 2015
Paris, France
<http://www.cop21.gouv.fr/en>

Please send your event details to info@icfpa.org



INTERNATIONAL
COUNCIL OF
FOREST & PAPER
ASSOCIATIONS

ICFPA - International Council of Forest and Paper Associations

The ICFPA is a worldwide network of forest and paper industry associations that was formed in 2002 to promote cooperation in areas of common interest to its members and to serve as the industry's advocate at the international level.

Email

info@icfpa.org

Web

www.icfpa.org

