FSC stakeholder meeting with the International Board of Directors
Mestre, November 26th 2018

The Italian forest/timber framework

Davide Pettenella,
Chairman of FSC Italy

https://play.kahoot.it/#/k/5d06f8e1-9846-4cdc-9d22-8391cfb368a8
Enter the PIN
Enter your name
Questions appear on a shared screen and players answer on their devices (only one valid answer for each question)
2+10 questions (the first 2 questions designed only to lean how Kahoot! works)

Environment
- Biodiversity
- Forests
- Forest cover dynamics

Economics
- Wood removals
- Wood and furniture industry
- Imports

Social
- Role of NWFP
- Stakeholders

Governance
- Public/private actors
- Command and control instruments

1st question on environmental aspects
Biodiversity

Italian flora:
over 5,800 species
5,300 herbaceous
and 500 woody
The richest country in Europe
(Europe: 7,500 species)


… but also invasive species

Source: https://biodiversity.europa.eu/topics/invasive-species
2nd question on environmental aspects

Forests

With almost 12 M hectares of forests, Italy has almost the same forest cover of Germany

<table>
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<tr>
<th>Forest cover</th>
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<th>Germany</th>
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Forests in Italy = mountains

95% of the forests in hilly and mountain regions:
= less developed areas

→ multi-functional forests (soil protection, water cycle regulation, fuelwood and timber production, recreation, …)

3rd question on environmental aspects
Expansion of forest cover

2-3 million hectares under natural conversion to forests (mainly in mountain areas)

1950 = 5.5 M hectares
2017 = 11.8 M hectares

1st question on economic aspects
Annual fellings = 6-7 M cubic metres
(60% fuelwood)
NAI = 25-30 Million cubic metres
Annual fellings/NAI = the lowest in Europe
(after Cyprus – source: Forest Europe 2015)

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<tr>
<td>Annual fellings/NAI</td>
<td>47%</td>
<td>80%</td>
<td>51%</td>
<td>39%</td>
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Fast growing plantations

**Poplar** plantations in the Po valley:
- Rotation period: 10 yr
- NAI: 15-20 cm/ha/yr
- only 70,000 ha but…
- = 60-70% of Italian removals of industrial timber
- IRR = 5-7%
2nd question on economic aspects
THE ITALIAN FURNITURE INDUSTRY GENERATES AS MUCH ADDED VALUE AS FRANCE, SPAIN AND SWEDEN COMBINED.

In spite of its structural shortage of raw materials, Italy’s solid furniture manufacturers are able to generate massive added value (€4.9 billion), ahead of many other top-rank countries such as France (€2.8 billion), Spain (€1.8 billion) and Sweden (€1.6 billion).

XXX XXX

THE ITALIAN FURNITURE INDUSTRY'S R&D INVESTMENT IS THE HIGHEST IN EUROPE.

Italian furniture manufacturers are Europe’s highest investors in R&D, spending €26.4 million on beating the competition in innovation and design. Ahead of the UK (£64.6), Germany (£63.9) and France (£7.5).

XXX XXX
ITALY LEADS THE EU IN 60% OF WOOD AND FURNITURE PRODUCTS.

Italy leads the EU-28 trade balance for 22 out of the 179 products internationally surveyed for the wood and furniture sector, including furniture, doors, windows and lighting products (Euro-Comparit Index, Edison Foundation).

2019 - number of products per sector
Flame: export position top per sector
Slate: balance commercial
Orange: number of products for which Italy holds the top spot in the trade balance at the world level

SOURCE: FLAME, EDISON INDEX, EDISON FOUNDATION

ITALY’S WOOD AND FURNITURE MANUFACTURING DISTRICTS LEAD THE WAY IN EUROPE.

Italian outstanding wood and furniture industry relies on its sixteen manufacturing districts. Two of Europe’s leading furniture-making centres are located in Italy: the Veneto and Lombardy regions. Five of Europe’s top fifteen furniture making regions are located in Italy (Veneto, Lombardy, Marche, Friuli Venezia Giulia, Tuscany).

SOURCE: FLAME, EDISON INDEX, EDISON FOUNDATION
3rd question on economic aspects

Import of industrial roundwood and fuelwood

Italy is the largest world importer of fuelwood and the 4th world importer of pellets in (1st for residential use)
8 major European countries represent 41.9% of global trade

Source: EFI Observatory of the European Forest Economy

Import of industrial roundwood and fuelwood

Italy is the largest world importer of fuelwood and the second importer of pellets in Europe for residential use.

Italy is probably the largest importer of illegal wood in Europe.
1st question on social aspects

NWFP consumption by country

Source: ECOSTAR H2020 project
How were WFP obtained?

(\% of households)

- Collected from wild by members of my household: 25.33\%
- Received as a gift: 15.08\%
- Purchased from a collector or a harvester: 21.78\%
- Purchased from a shop: 81.50\%
- Other: 4.07\%

Source: ECOSTAR H2020 project

PERCENTAGE OF HH THAT PICK NWFPs

- Latvia: 67.88\%
- Czech Republic: 58.56\%
- Slovenia: 53.58\%
- Estonia: 52.96\%
- Slovakia: 52.47\%
- Finland: 49.87\%
- Lithuania: 49.58\%
- Poland: 43.90\%
- Russia: 40.00\%
- Bulgaria: 37.50\%
- Austria: 36.65\%
- Sweden: 34.07\%
- Croatia: 32.43\%
- Germany: 29.67\%
- France: 25.21\%
- Romania: 24.17\%
- Turkey: 21.85\%
- Spain: 18.32\%
- Italy: 17.35\%
- Serbia: 16.71\%
- Denmark: 14.92\%
- Greece: 13.41\%
- Ireland: 11.01\%
- Portugal: 9.98\%
- Hungary: 9.79\%
- United Kingdom: 8.25\%
- Belgium: 7.57\%
- Netherlands: 4.33\%

Source: ECOSTAR H2020 project
2nd question on social aspects

A relevant role of public authorities, also as employer

**Forest workers**

2017: **48,800** workers employed by public administration  
2015: 53,700  
2010: 60,300

Source: D’Alessio – Fondaz. METES (2018)
1st question on governance aspects

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<td>51%</td>
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<td>Forest of National Parks and</td>
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<td>protected areas</td>
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**Forest policy**: an approach based more on command and control instruments

→ A strong bureaucracy
2nd question on governance aspects

The only country in Europe with an Armed Force (the Carabinieri) in charge of the control of forest resources and management of State forests
Italy: country of contrasts and contradictions, where you find the best and the worst, also in the forestry sector. It’s very difficult to grasp a true idea of the country.

This is why it is very useful for us to have an independent and rigorous system of external evaluation.

Thanks to be here. Enjoy your staying, stay in contact!

Giuseppe Arcimboldo, 1526-1593