



eip-agri
AGRICULTURE & INNOVATION

EIP-AGRI Focus Group **Sustainable mobilisation of forest biomass (SMFB)**

Forest Innovation Workshop

Representation of the Free State of Bavaria to the European Union

Brussels, 26 April 2018

funded by



EIP-AGRI Focus Groups



COORDINATION

COORDINATING EXPERT

Andreas KLEINSCHMIT VON LENGEFELD
FCBA, FRANCE

EIP AGRI

Beatriz Guimarey FERNANDEZ, SPAIN
Iiri RAA, ESTONIA

DG AGRICULTURE, EC

Antonella ZONA,
Steve SMITH,
Tamas SZEDLAK

EXPERTS

Stelian Alexandru BORZ, *ROMANIA*
Marta GAWORSKA, *POLAND*
Henri HUSSON, *FRANCE*
Martin HÖBARTH, *AUSTRIA*
Nike KRAJNC, *SLOVENIA*
Ricardo MARINHO, *PORTUGAL*
Jesús MARTÍNEZ BEN, *SPAIN*
Dulce MOTA, *PORTUGAL*
Nuala NÍ FHLATHARTA, *IRELAND*
Karoliina NIEMI, *FINLAND*
Tomas NORDFJELL, *SWEDEN*
Juan PICOS, *SPAIN*
Mark PRIOR, *UNITED KINGDOM*
Jabier RUIZ, *BELGIUM*
Roland SCHREIBER, *GERMANY*
Kieran SULLIVAN, *IRELAND*
Mindaugas ŠILININKAS, *LITHUANIA*
Franz THOMA, *BELGIUM*
Ritva TOIVONEN, *FINLAND*
Gerhard WEISS, *AUSTRIA*



CONTENTS

- Scope of Focus Group “SMFB”
- Objectives
- Key impact factors for SMFB
- Findings of Focus Group "SMFB"
 - Key issues market trends & harvesting
 - Research and innovation needs
 - Operational Groups (OGs)

Scope of Focus Group "SMFB" (FG"SMFB")

Sustainable mobilisation of forest biomass

FG"SMFB" concentrates on...

- » Innovation in mobilising different types of forest biomass for all potential markets and better interlinking supply and demand.
- » Economic, environmental and social functions of forests are the basis of the work.

Objectives of FG"SMFB"

Sustainable mobilisation of forest biomass (SMFB)

- Identify success and fail factors and explore the role of innovation and knowledge exchange in addressing them.
- Identify, describe the cooperation of small-scale forest owners and barriers to implementation. Provide examples of best practices.
- Analyse supply and demand factors, and the means to provide a link between the two (e.g. electronic marketing tools).
- Propose potential innovative actions to stimulate the knowledge and use of management practices and strategies in mobilising forest biomass.
- Identify research and innovation needs coming from practice
- Provide ideas for Operational Groups and other innovative projects.



The eight "Mini Papers" of FG "SMFB"

Sustainable mobilisation of forest biomass (SMFB)

- » The content work of FG"SMFB" is structured into eight key themes to address best the complexity of SMFB.
- » For each key theme a so-called Mini Paper (MP) has been produced jointly:
 - MP1: Involvement of actors/stakeholders in regional initiatives for forest biomass mobilisation
 - MP2: Forest ownership types
 - MP3: Markets
 - MP4: Decision support tools
 - MP5: Harvesting and transportation technologies
 - MP6: Contribution to environmental issues
 - MP7: Incentives for mobilisation of forest biomass
 - MP8: European map of the regional forest-based sector

Identified key impact factors for SMFB in Europe

- **Changing markets** and demand for forest-based products
- (rapidly) Emerging **new markets** on the global scale (impact of globalisation)
- Enhanced competition between traditional and novel forest-based value chains with **increasing demand** for raw material supply
- **Competition for land-use** and thus a threat of decreasing Roundwood production and supply
- (In)Efficient **Infrastructure** / logistic concepts (transportation value chains) in all regions
- **Pricing** of Roundwood and forest products
- (Demand for) new **processing technologies** for soft- and specially for hardwood species
- **Climate change** and its impacts on the supply of forest feedstock (not the same expected impact in different European regions)

Findings of FG "SMFB"

Market trends and new demands

Market trends and new demands

- Increasing demand for Roundwood, sawn timber products, panel and board, pulp and paper
- Increasing demand for smaller diameter wood and wood residues
- Improving efficiency of operations
- Web-based trading, advanced wood procurement and best adapted harvesting technologies
- Efficient silviculture management models for producing Roundwood and wood-fibres while safeguarding sustainability

Findings of FG "SMFB"

Key issues for harvesting

Key issues for harvesting

- Operations on a smaller scale need to focus on **efficiency**
- **Larger scale** operations are needed to increase efficiency and to reduce unit costs
- Reducing **time and costs** spend on relocation of machinery is essential
- **Training** of forest workers and machine drivers is needed to achieve greater efficiencies and capacity
- **Digitisation** of chain of custody and supply chains allows for better performance

Research and innovation needs

Prioritised 6 out of 28

1. Analysing the impact and effectiveness of **incentives** for sustainable mobilisation of forest biomass including predictions and scenarios of tailor-made measures.
2. Examining the functioning of various existing regional forest **ownership organisations**. How do long-established and well performing associations operate? Are there lessons to be learned?
3. Market analysis of **future demand and supply** (long- and short term perspectives) of forest biomass including potential new and traditional value chains.
4. Developing user-friendly **information platforms** and new tools (map-based) to **exchange knowledge** on forest management planning in the long term (multi-objective approach) across European regions.
5. Analysing the potential of new forest-based **cross-regional value chains** and production systems for enhancing Europe's competitiveness
6. Options and incentives for **carbon sequestration** through forest management: Identify and analyse incentives for carbon sequestration through active forest management and the use of timber and other forest-based products

Ideas for Operational Groups

1. Developing **regional models** (including Decision Support Systems – DSS) for improved forest management in small-scale forests (and consolidation, establishment of land registers, cooperatives).
2. Participating in the digitization process by using new models for **innovative virtual timber sales** / marketing hubs.
3. Reviewing existing **awareness-raising measures** for forest owners addressing the importance of their forests in providing ecosystem services, including the evaluation of **communication tools**.
4. Promotion and adaptation of existing “good practices” examples in order to **transfer existing knowledge** amongst practitioners and / or regions.
5. Profiling regional models for the development of **forest owner groups** to become **more self-sufficient** without over-dependency on “volunteerism”.



Other recommendations and innovative ideas

- Exchanging knowledge on the real impacts and effectiveness of current incentives across Europe (tailor-made solutions)
- Provision of means to support the facilitation of forest owner associations
- Evaluation of existing participatory approaches (e.g. regional learning labs) to involve stakeholders
- Strengthening the stakeholder dialogue (along wood value chains)
- Developing incentives for marketing hubs
- Support new practices and policies along value chains for increasing SMFB

More information:

- Focus Group "SMFB"
<https://ec.europa.eu/eip/agriculture/en/focus-groups/sustainable-mobilisation-forest-biomass>
- Final Report
<https://ec.europa.eu/eip/agriculture/en/publications/eip-agri-focus-group-forest-biomass-final-report>
- Factsheets
<https://ec.europa.eu/eip/agriculture/en/publications/eip-agri-factsheet-forest-biomass>

Thank you for your attention
Stay connected – mobilise yourself !