

“Timber, coming from Russia and how certification is a factor”

俄罗斯的木材供应以及认证如何发挥作用

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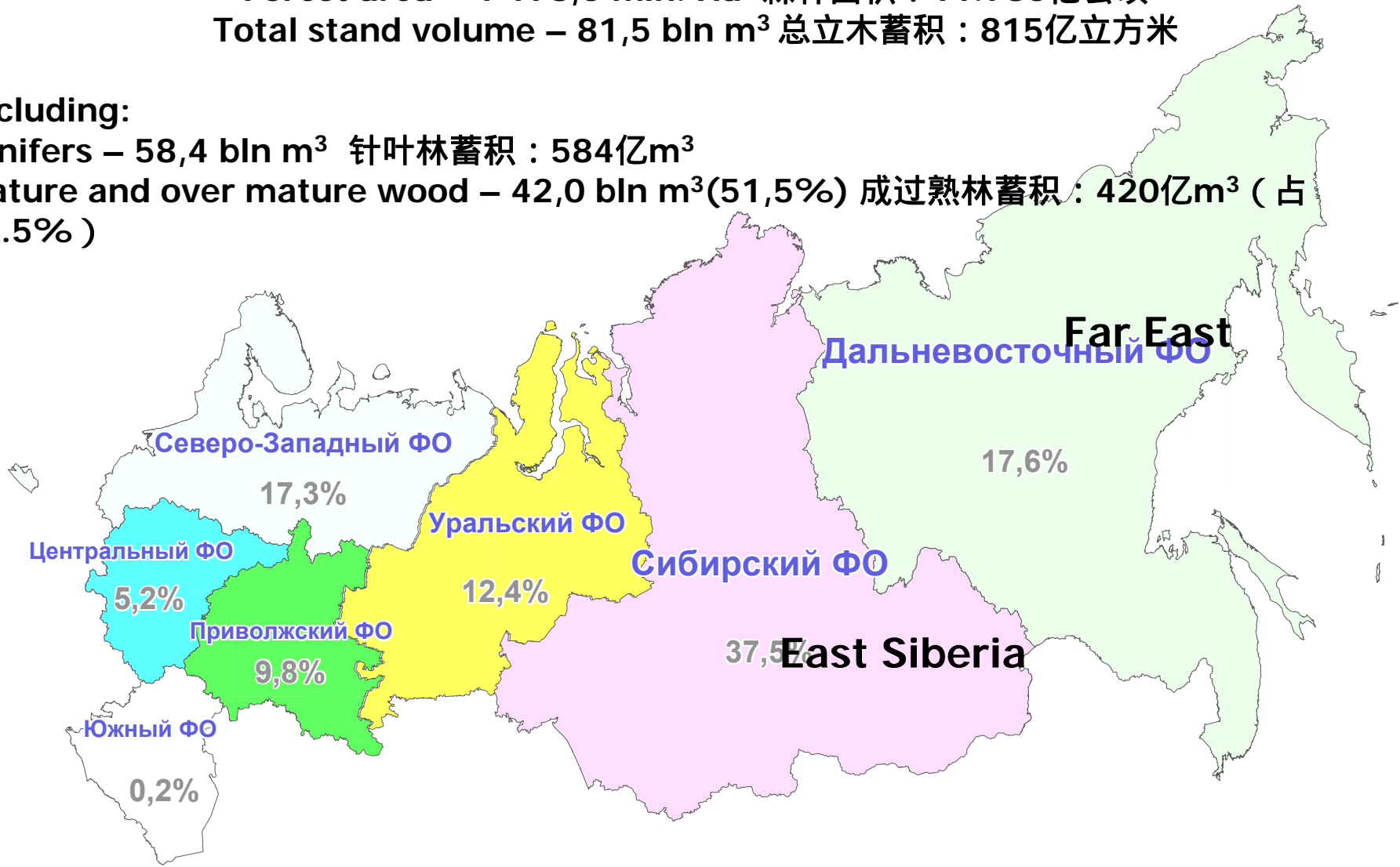
Forest Resources of Russia 俄罗斯的森林资源

Forest area – 1 178,5 mln. Ha 森林面积：11.785亿公顷
Total stand volume – 81,5 bln m³ 总立木蓄积：815亿立方米

Including:

conifers – 58,4 bln m³ 针叶林蓄积：584亿m³

Mature and over mature wood – 42,0 bln m³ (51,5%) 成过熟林蓄积：420亿m³ (占51.5%)



Annual increment – 993,8 mln. M³ 年生长量：9.938亿m³

Including:

conifers – 575,4 mln. M³ 针叶林年生长量：5.754亿m³



New Forest Legislation: major features 新森林法：主要特征

- Since 2007 Russian forestry is operating under fundamentally new terms and conditions, formed by the new Forest Code
2007年俄罗斯林业就按照新森林法的新条款和条件进行运作
- Maximum decentralization of forest management and forest use in Russia
在俄罗斯，最大限度地下放森林经营和使用权
 - Transfer of authority and responsibilities over the forest management, forest use and protection to the regional level (*subjects of the Russian Federation*)
将森林经营、森林使用和保护的权利和责任转移到地区（俄罗斯联邦主体）层次
- New export tariff policy for round wood
原木出口关税新政策





New Export Tariff Policy for Round Wood 原木出口关税新政策

Main reason for export tariffs revision is quick stimulation of domestic wood processing and raising effectiveness of the forest sector
出口关税修订的主要原因是鼓励国内木材加工业和提高林业部门的效力

Resolution of the Russian Government N75: 俄罗斯政府第75号决议

from 1-Jul-2007: 20% = EUR 10/m³ 2007年7月1日起：20%关税=10欧元/m³

from 1-Apr-2008: 25% = EUR 15/m³ 2008年4月1日起：25%关税=15欧元/m³

from 1-Jan-2009: 80% = EUR 50/m³ 2009年1月1日起：80%关税=50欧元/m³

Compare with Canada and USA: 27% 对比：加拿大和美国：27%关税
Finland, China – timber export is prohibited 芬兰和中国：禁止木材出口



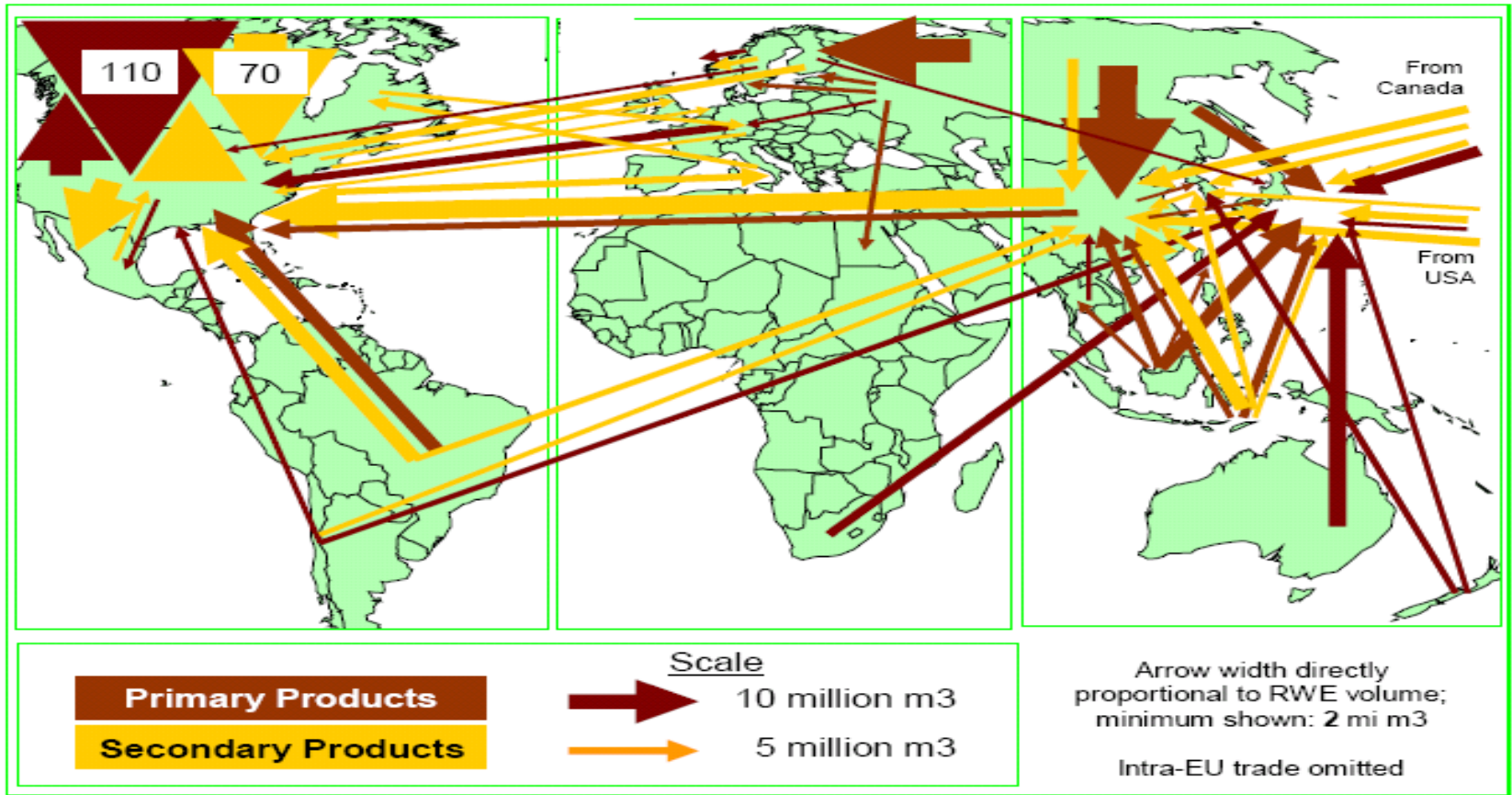


Timber, coming from Russia 俄罗斯木材供应

Major trade flows of primary products -roundwood (■) and secondary products – processed timber (□)

初级产品的主要贸易流通情况：原木和加工过的木材

Figure 5. Major trade flows (Primary and Secondary Products, 2005)



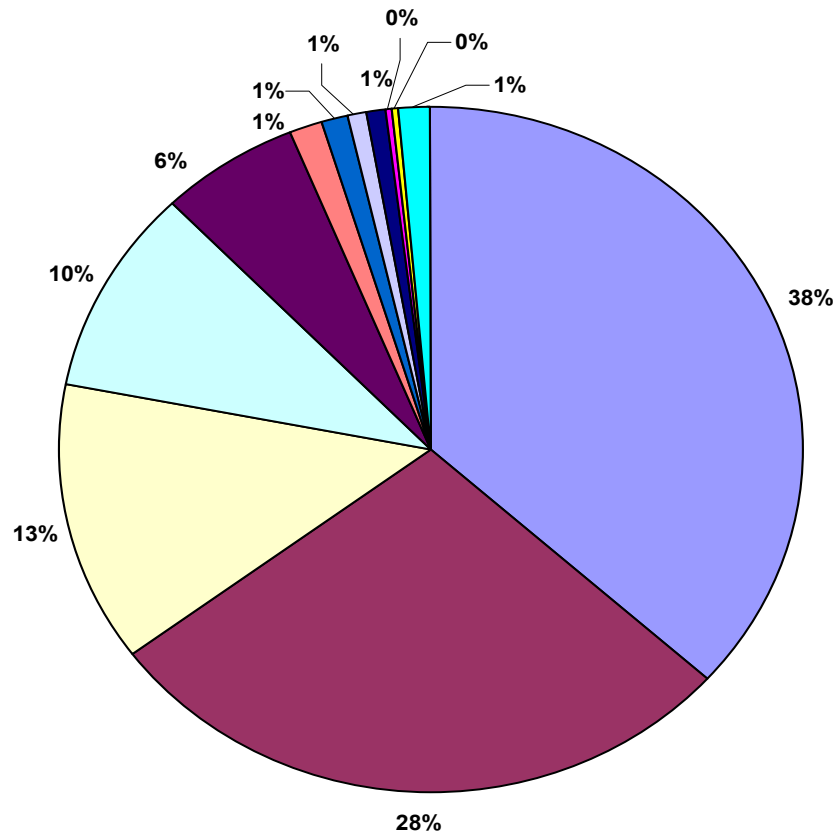
Source: James Hewitt, based on calculations commissioned for this paper.





Russian Export of Forest Products (2007, by value)

俄罗斯林产品出口 (2007年, 按出口值计算)



- round wood
- sawnwood
- paper
- pulp
- plywood
- fibreboard
- builder's joinery
- fuelwood
- particle board
- shaped wood
- reclaimed paper
- other





Growth of the Forest Certification in Russia

森林认证在俄罗斯的发展

- 2000 – first certificate in Altaysky Kray (Siberia) - 32,7 thousand ha
 - 2008 – 19,967 mln ha (North-West, Siberia, Far East)
 - It comprises more than 1/10 of commercial forests (under lease)
 - 2-nd place in the world
-
- 2000年——在西伯利亚Altaysky Kray的首次认证，面积3.27万公顷
 - 2008年——认证面积约2千万公顷（西北部、西伯利亚和远东）
 - 认证森林包括了1/10以上的商品林（租赁林）
 - 位居世界第二





Growth of the Forest Certification in Russia

森林认证在俄罗斯的发展

It is well recognized that certification is a tool to:

- Be promoted at the environmentally sensitive markets in Europe and worldwide;
- Making forest management and forest use sustainable;
- Gaining better investment conditions as certification has become an indicator of forest management sustainability, reliability of a company and illustration of its perspective growth.

认证被公认为是进行下列活动的一种工具

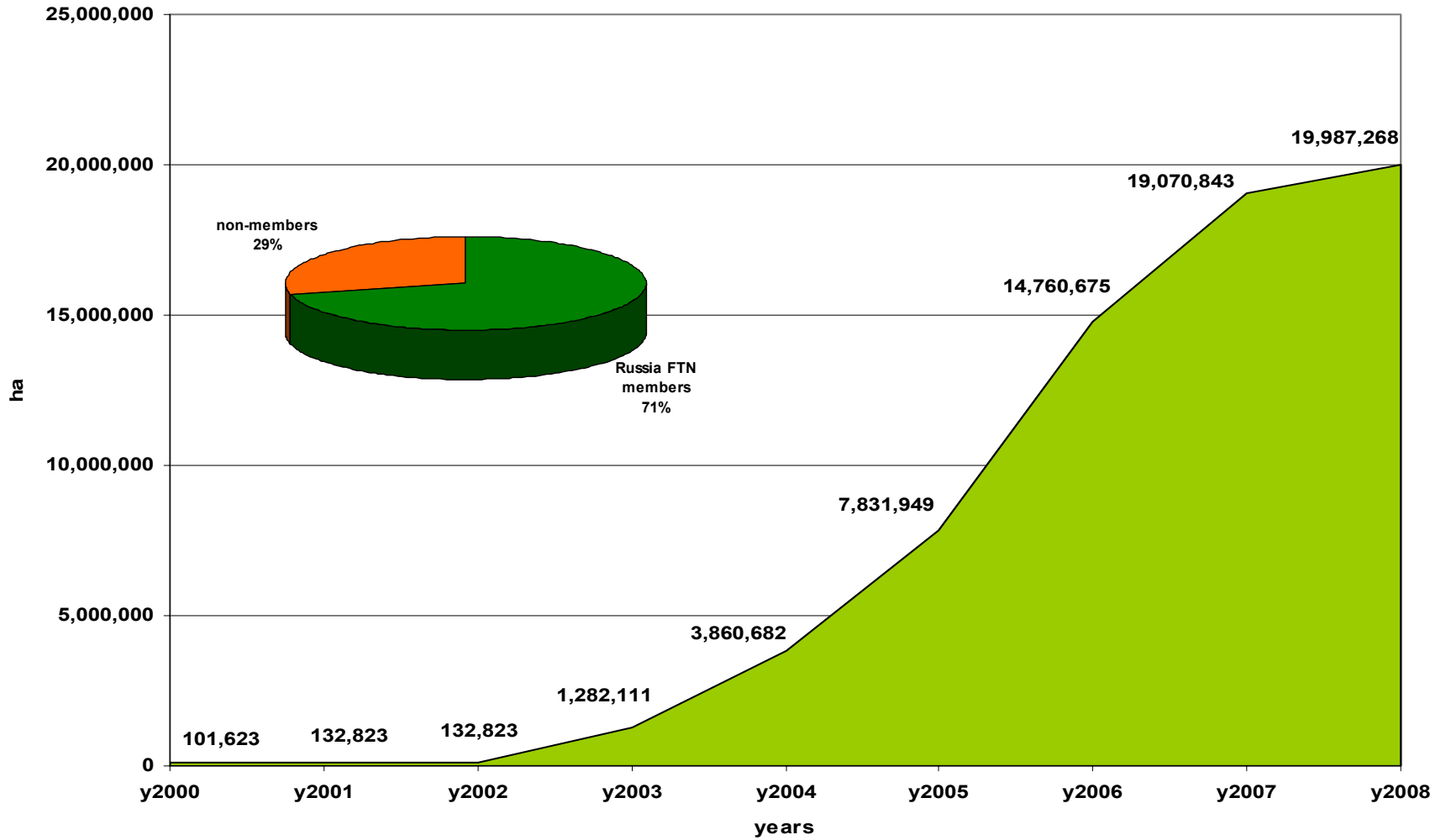
- 在欧洲和全世界的环境敏感市场进行产品推介；
- 确保森林经营和森林利用的可持续；
- 获得更好的投资条件，因为认证已经成为森林经营可持续性、公司的可靠性以及其未来发展的前景的一项指标。





FSC Forest Management Certification in Russia

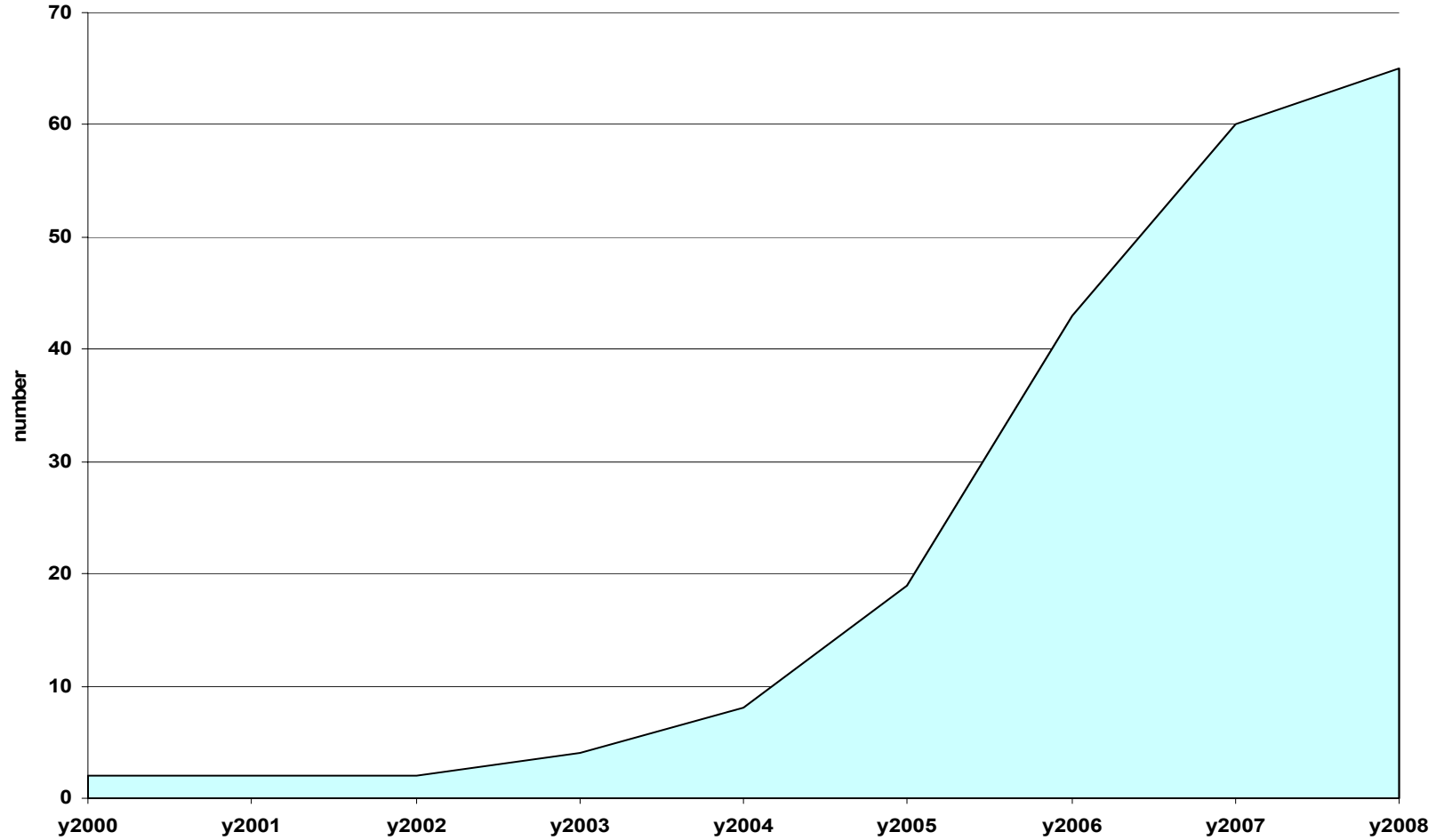
俄罗斯的FSC森林经营认证





FSC Chain of Custody Certification in Russia

俄罗斯的FSC产销监管链认证





Link to Environmental Responsibility through Certification Global Forest & Trade Network (GFTN) 通过认证与环境责任相联系——全球森林和贸易网络

WWF's initiative to co-operate with companies ON responsible forest management
AND procurement of forest products from responsible sources BY :

- using credible certification as a tool
- using robust methods based on a stepwise approach
- providing appropriate services (technical assistance, market links, advocacy, reputation)

Total number of companies-members and candidates (buyers and producers) – 416
Producers (members and candidates) – 68
Buyers (members and candidates) – 348

WWF倡议通过下列方式就负责任的森林经营和来自负责任来源林产品的采购与公司进行合作：

- 利用可信认证作为一种工具；
- 采用基于渐进方式的新方法；
- 提供适当的服务（技术支持、市场链接、积极支持和声誉）

目前，成员和申请公司总数达416家（包括采购商和生产商），其中生产商68家，采购商348家





Global Forest and Trade Network (GFTN) 全球森林与贸易网络





Russian FTN - Association of Ecologically Responsible Timber Companies

俄罗斯森林与贸易网络——生态负责的木材公司协会



- Established in 2000, under aegis of WWF
- Member of Global Forest and Trade Network (GFTN)
- Partnership between WWF and Russian companies, seeking to improve their ecological performances and striving for FSC certification
- Basis: signed agreement with environmentally responsible company

АССОЦИАЦИЯ
ЭКОЛОГИЧЕСКИ ОТВЕТСТВЕННЫХ
ЛЕСОПРОМЫШЛЕННИКОВ РОССИИ

- 在WWF的支持下于2000年成立
- 是全球森林与贸易网络的成员
- 与WWF和木材公司合作，致力于改善其环境业绩并争取进行FSC认证
- 基础：与环境负责的公司签署协议





Russia Forest and Trade Network 俄罗斯森林和贸易网络

- 1 – Ilim Group
- 2 – Arkhangelsk PPM
- 3 – Volga
- 4 – Solombala Sawmill
- 5 – Kartontara
- 6 – TAMAК
- 7 – Sawmill-25
- 8 – Cherepovetsles
- 9 – Lesosibirsk Sawmill-1
- 10 – Solikamskumprom
- 11 – SLT – Sawmill-3
- 12 – Fankom
- 13 - Dammers

- 14 – Swedwood Tikhvin
- 15 – Siberian Silver Pine – Management
- 16 – Zalazna Sawmill
- 17 – VM-Invest
- 18 – Cardinal
- 19 – Les Export
- 20 – Premium-les
- 21 – Yeniseylesozavod
- 22 – Arkhangelsk Sawmill-3
- 23 – Priozersky DOZ
- 24 – Terneyles
- 25 – Lesinterkom
- 26 – Titan-Lesprom

- 27 – Technoclassik
- 28 – Mospromstroyaterialy-Vyatka
- 29 – Pankratov
- 30 – Primorsklesprom
- 31 – Primorsky GOK
- 32 – Serebryanaya Sosna
- 33 – TMKPerspektiva
- 34 – Mondi Business Paper – Syktyvkar
- 35 – Kay
- 36 – Segezha PPM
- 37 – Sorvizhi-les
- 38 – Almis
- 39 – Kata
- 40 – Malakhit
- 41 – PLO Onegales
- 42 – Lesstandart
- 43 – Prizma Holz
- 44 – Promlespostavka
- 45 – Investlesprom
- 46 – ResursLesTrans
- 47 – Delta-Plus
- 48 – Lesprom-Invest

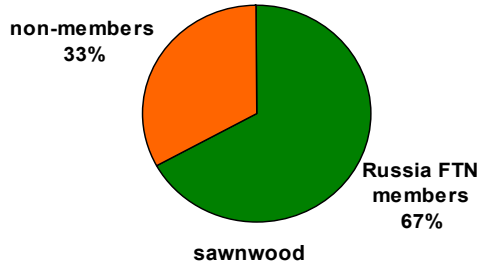




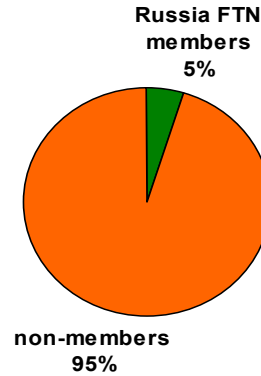
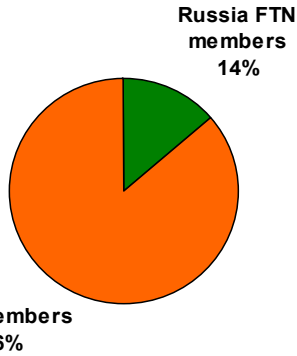
Russia FTN Members' Share of the Total Russian Export (2007, by volume)

俄罗斯森林与贸易网络成员占俄罗斯林产品出口总额的份额
(2007年, 按出口值计算)

Pulp & paper



fibreboard





Share of Russia FTN Members in Timber Export by Regions (2007, by volume)

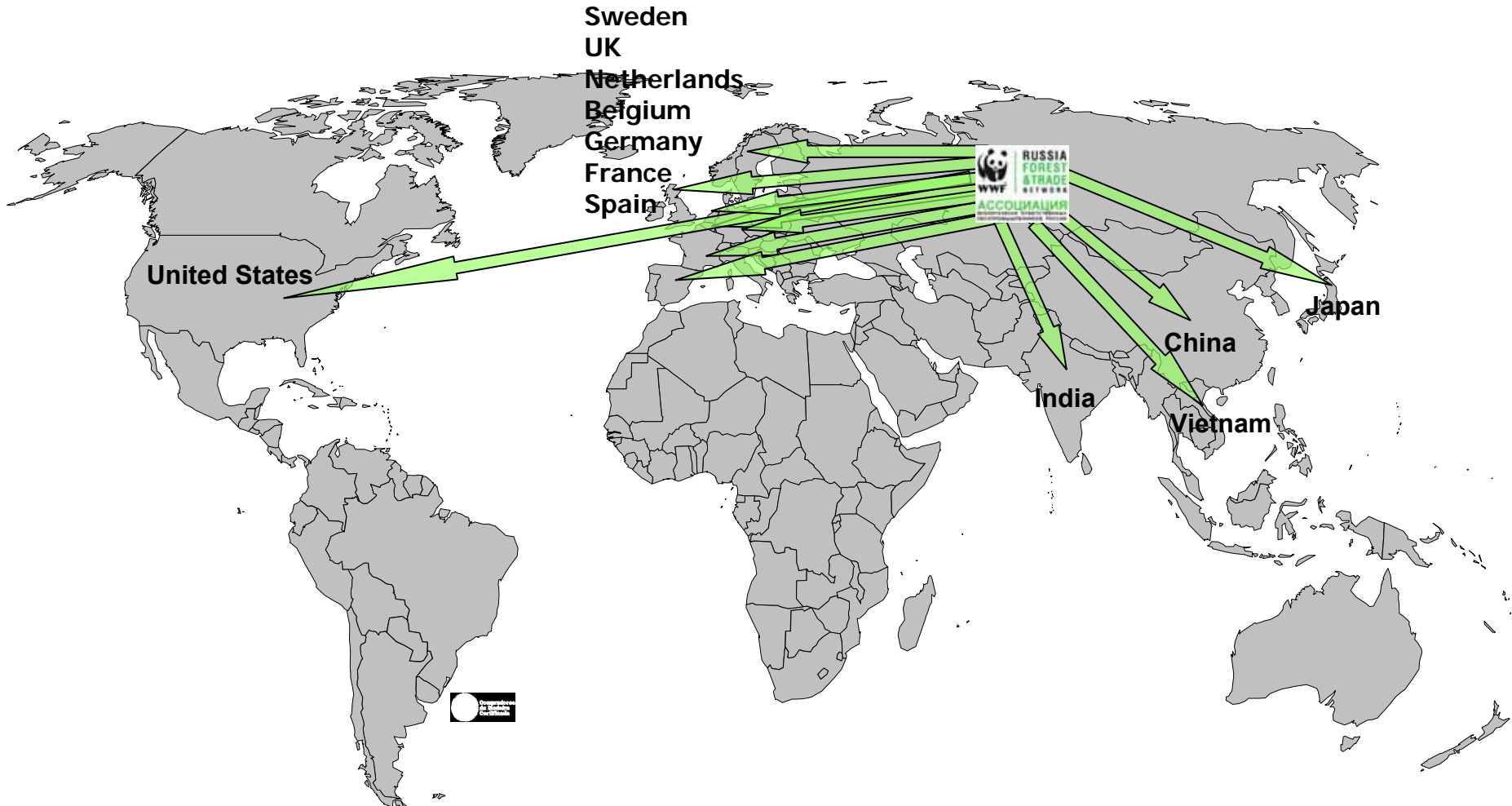
各地区俄罗斯森林与贸易网络成员的木材出口份额（2007年出口值）





Foreign Market Links of Russia FTN Members

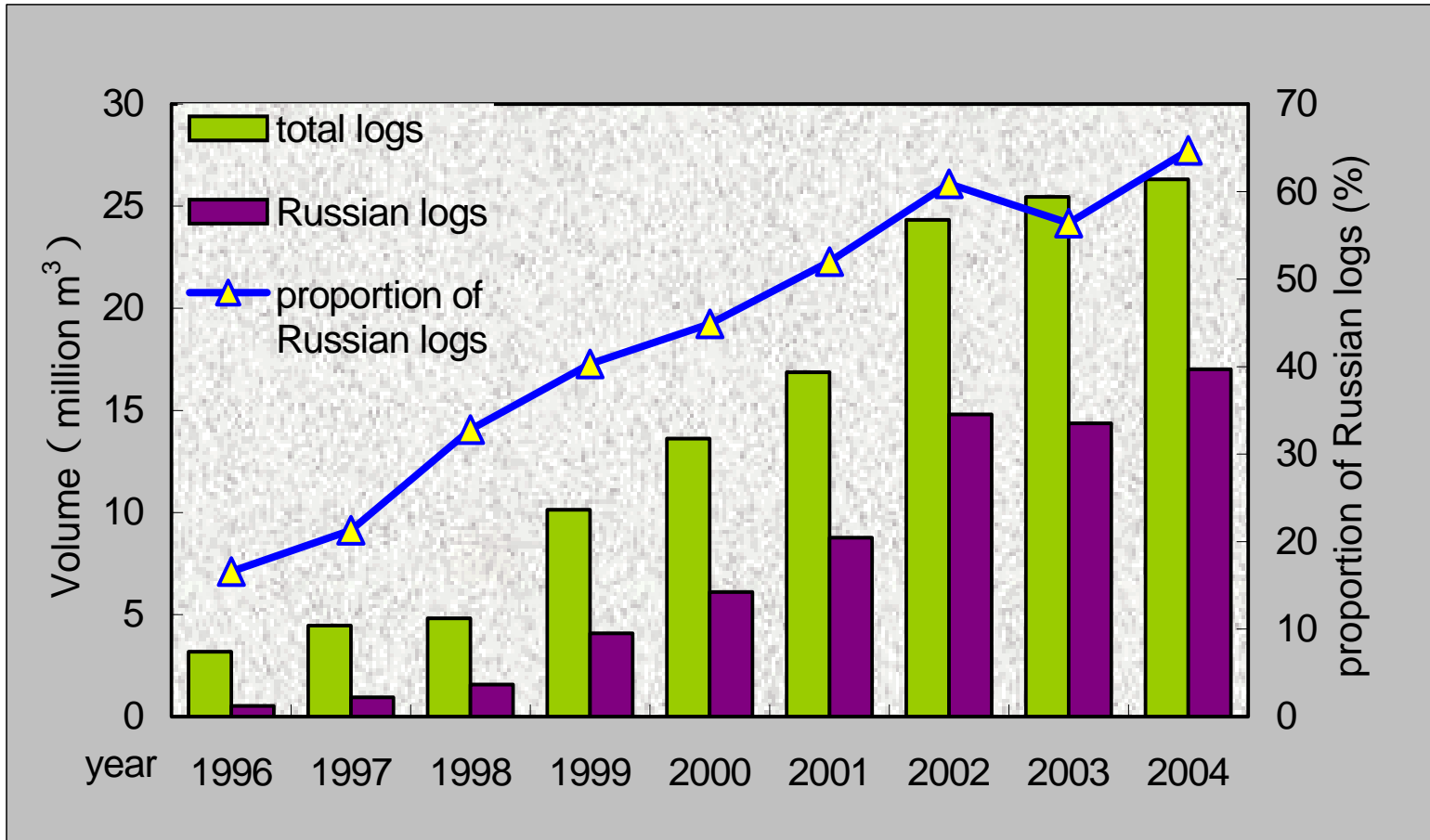
俄罗斯森林与贸易网络成员的国外市场分布





Chinese import of roundwood, 1996–2004

中国的原木进口 (1996-2004)

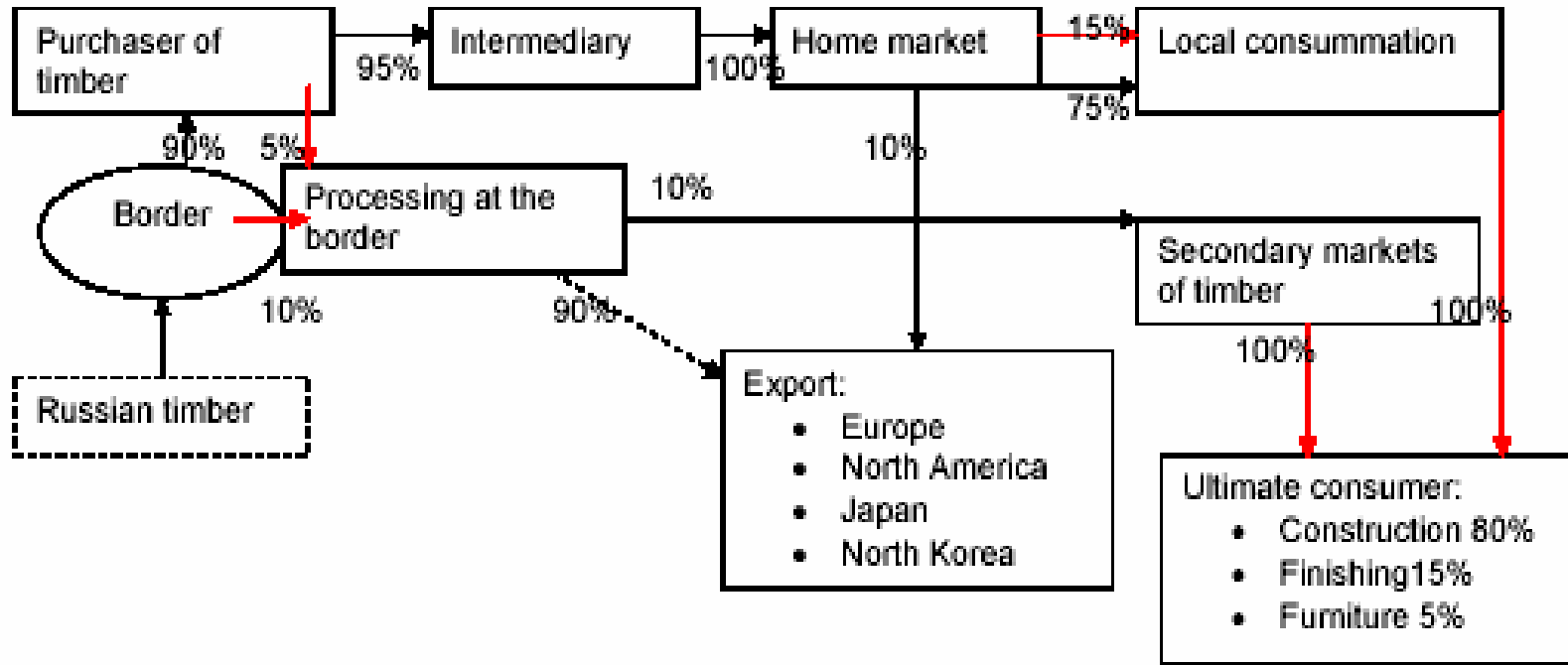




Distribution of Russian Timber in China

(source: Forest Trends)

俄罗斯木材在中国的流通 (来源：森林趋势)





WWF Response WWF的响应

- Environmentally Responsible Forest Business – through certification - FTN Russia
- “Keep it legal” manual
- Joint Strategy of Russia and China FTNs in Responsible Timber Trade from Russia to China
- Demonstration pilots for “verified legal” wood in cross-border (Russian forest to China factory) to promote systems to identify legally-sourced wood in supply chains involving Russia and China
- 环境负责任的森林企业——通过认证和俄罗斯森林与贸易网络
- “保持其合法性”手册
- 俄罗斯和中国森林与贸易网络成员的联合策略：中俄负责任的木材贸易
- 跨境木材“验证合法性”的示范试点（从俄罗斯森林到中国的工厂），以促进制定体系来鉴别中俄供应链中合法来源的木材





WWF Response WWF的响应

- Field staff training on how to identify illegally-sourced timber
- Recommendations to stakeholders on improved methods for legal verification of wood supply
- Cooperation with Customs in Russia and China improve methods for control of trans-boundary timber shipments and compilation of customs statistics
- Public Awareness (publications)
- 人员实地培训如何鉴别合法来源的木材
- 向利益相关者提供建议来改进木材供应合法验证的方法
- 与俄罗斯和中国的海关合作，改进跨境木材运输控制方法并且整理海关统计数据
- 提高公众意识（出版物）





New Trends of Environmentally Responsible Forest Business in the Russian Far East and Siberia

在俄罗斯远东和西伯利亚地区，环境负责的森林企业的新趋势

- Increase of Russia FTN company-members in **Siberia and the Far East**:
在西伯利亚的远东地区，俄罗斯森林与贸易网络公司成员的数量日益增加：

2005 – 3 members	2005年——3家公司
2006 – 7 members	2006年——7家公司
2007 – 13 members	2007年——13家公司
2008 – 16 members	2008年——16家公司
- Growth of FSC-certified forests in **Siberia and the Far East**:
在西伯利亚的远东地区，FSC认证森林面积日益增加

2004 – by 1 662 976 ha	2004年——约166万公顷
2005 – by 1 589 944 ha	2005年——约159万公顷
2006 – by 1 332 934 ha	2006年——约133万公顷
2007 – by 1 651 767 ha	2007年——约165万公顷
2008 – by 102 634 ha	2008年——约10.2万公顷
totaling now 6 340 255 ha	目前合计约634万公顷





New Trends of Environmentally Responsible Forest Business in the Russian Far East and Siberia

在俄罗斯远东和西伯利亚地区，环境负责的森林企业的新趋势

- 2007: workshops on environmentally responsible forest business in the Russian Far East and Siberia (Vladivostok, Irkutsk, Tomsk)
- 2007: visit of China FTN experts to Siberia and the Far East
- 2007: participation of Russia FTN Manager in the Annual Meeting of China FTN
- 2008: visit of Russia FTN members to China scheduled
- 2007年：在俄罗斯远东和西伯利亚地区（符拉迪沃斯托克、伊尔库斯克和托姆斯克）召开了环境负责的森林企业的研讨会；
- 2007年：中国森林与贸易网络专家考察了西伯利亚和远东地区；
- 2007年：俄罗斯森林与贸易网络管理人员参加了中国森林与贸易网络年会；
- 2008年：俄罗斯森林与贸易网络成员将按计划访问中国。





FSC in China FSC在中国的发展

- Growing number (hundreds!) CoC certificates in accordance with FSC (398)

数量日益增加：FSC的产销监管链认证数量达398

- About 1 million ha are certified in accordance with SFM FSC standards

大约100万公顷森林通过了FSC森林经营认证

- 2006 – National FSC Working Group is established, National FSC Representative office launched

2006年，FSC国家工作组成立，组建了FSC国家代表处

- FSC gets recognition and support at the state level

FSC获得了国家层次上的认可和支持

- Growing demand on FSC certified wood

对FSC认证木材的需求日益增加





Emerging Trends: 未来趋势

Europe

- State procurement policies
- EU requirement to purchase only certified timber since 2009
- EU FLEGT process development

欧洲

- 国家采购政策
- 欧盟要求到2009年只购买认证木材
- 欧盟森林执法和施政进程的发展





Emerging Trends: 未来趋势

Asia

- China
 - Government: more attention to the issue of cross border illegal logging and trade (EU conference held in China)
 - Business: clear trend towards responsible management and trade (growing numbers of CoC certificates)
- Japan – state procurement policy adopted

亚洲

- 中国
 - 政府: 更加关注跨境非法采伐和贸易问题 (欧盟会议在中国举行)
 - 企业: 负责任经营和贸易的趋势日益明显 (产销监管链数量日益增加)
- 日本 – 国家采购政策被采纳





Emerging Trends: 未来趋势

Russia

- More companies oriented towards European markets
- Growing number of foreign companies operating in Russia
- Development and introduction of their OWN systems of timber tracking
- Cooperation with WWF to identify company's «weak» points and to harmonize timber tracking systems with the new forest legislation as well as to jointly participate in the development of new normatives

俄罗斯

- 更多的公司转向欧洲市场
- 俄罗斯境内的外国公司数量日益增加
- 各公司自己木材跟踪体系的制定和引入
- 与WWF合作来确定公司的弱势，将木材跟踪体系与新森林法相协调，同时联合参与新标准的制定





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