



WOOD2GOOD

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The Restructuring of the Wood Sector in Europe: towards a Green Economy

EU Industrial Policy & Blueprint for the EU Forest-based Industries (F-BI)

Jeremy Wall

European Commission, DG Enterprise and Industry

Unit-F3 «Raw Materials, Metals, Minerals and Forest-based Industries»

EU Industrial Policy

- Objective: develop and implement EU Industrial Policy to **help provide growth and jobs through enhanced competitiveness and «re-industrialisation»** (manufacturing regaining 20% share of GDP by 2020)
- European Commission Directorate-General for Enterprise & Industry:
- **"Horizontal"** EU Industrial Policy paper: **For a European Industrial Renaissance** (COM(2014) 14 of 22/01/2014) - pillars:
 - AN INTEGRATED, SINGLE EUROPEAN MARKET: CREATING AN ATTRACTIVE PLACE FOR ENTERPRISES AND PRODUCTION
 - INDUSTRIAL MODERNISATION: INVESTING IN INNOVATION, NEW TECHNOLOGIES, PRODUCTION INPUTS AND SKILLS
 - SMALL AND MEDIUM-SIZED ENTERPRISES AND ENTREPRENEURSHIP
 - INTERNATIONALISATION OF EU FIRMS
- EU **sectoral** industrial strategies, including for **forest-based industries**



EU “Raw Materials Initiative” (EC-led: top-down)

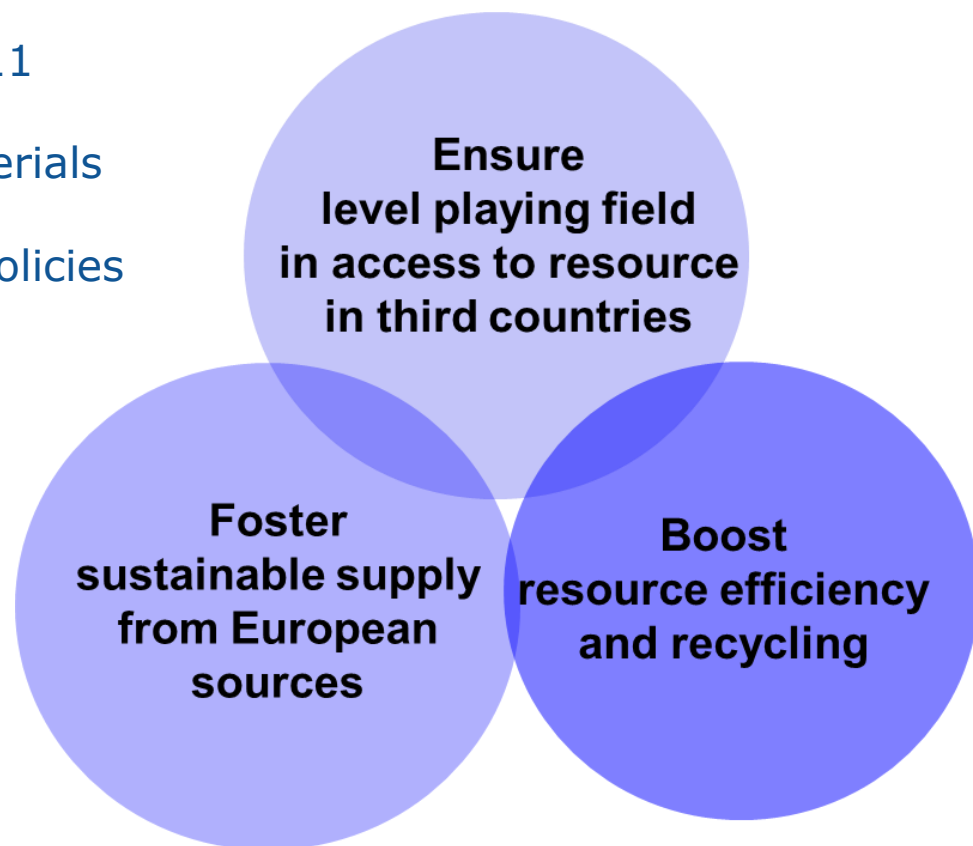
- Aim: **securing sustainable supplies of raw materials**
- Launched in 2008, consolidated in 2011
- Non-energy, non-agricultural raw materials
- Connecting EU external and internal policies
- Integrated strategy (3 pillars)

➤ **European Innovation Partnership on Raw Materials**

COM(2012) 82 final - 29 February 2012

(Stakeholder-led: bottom-up)

- **Wood & natural rubber included - as organic raw materials**



2008 EU Forest-based Industries (F-BI) Strategy

- Set out in Commission's policy paper "*Communication on innovative and sustainable forest-based industries in the EU*" (COM(2008)113)
- Scope: **woodworking, pulp & paper, printing**
- Content: five challenges areas:
 1. Access to raw materials
 2. Impact of climate change policies
 3. Innovation, Research and Development
 4. Trade and co-operation with third countries
 5. Communication and information

and 19 actions to address them

2013 new Forest-based Industries Strategy

- Scope extended: **woodworking; furniture; pulp & paper; printing**
- Forest-based Industries **Advisory Committee ad-hoc Working Group** (European industry representatives + member-state observers + experts) - five meetings throughout 2012
- Review of the challenges and actions in the 2008 EU Sectoral Strategy and in-depth discussion of new challenges arising since and possible areas for remedial actions
- **Output: “non paper” detailing 12 challenges and action areas for each**

2013 Forest-based Industries strategic approach

This work gave input to Commission's 2013 sectoral package, including the Commission Communication on "a new EU Forest Strategy: for forests and forest-based sector" (COM(2013)659)

Section 3.3.2 of the Forest Strategy is cross-referenced with the "**Blueprint for the EU Forest-based Industries**" (SWD(2013)343)

Blueprint contents:

- Introduction (overview of EU forest-based industries)
- Economic & technological outlooks
- Sub-sectors description
- 12 challenges and identification of remedial activities for **2013-2020** to address them.

2013 EU Strategy: Challenges facing the F-BI:

1. Stimulating **growth**
- 2&3. EU resource & energy** efficiency objectives
- 4. Raw materials**, their sources and their flows
- 5. Logistics** (wood harvesting, infrastructures & transport)
6. Structural **adaptation**
7. Innovation & **RTD**
8. Education, training & **skills**, including shortages; ageing workforce
9. Coherence of **EU legislation** and costs arising
10. Implementation of EU **climate** policy, including beyond 2020
11. International competition, **trade** and co-operation
12. Information, communications and **image**

2013 EU Strategy: Selected activities (1/4)

- Stimulating growth:
 - Follow-up of the **sustainable construction communication**
 - Improving information on furniture products
 - Developing "bio-based economy"
 - **Missions for Growth** (e.g. 17-19 June 2013 in Russia)
 - Sectoral information on third-country import conditions (EU database and Advisory Committee on Market Access)
- International competition, trade and co-operation:
 - **Sectoral regulatory dialogues:**
 - **Bilateral trade agreements**
 - **Trade defence instruments**

2013 EU Strategy: Selected activities (2/4)

- Resource & energy efficiency:
 - Promote cascading use of wood
 - EU Waste Framework Directive review (wood targets)
 - Catalogue and good practice guidance on resource- & energy-efficient measures for wood-processing, esp. for SMEs
- Raw materials supply and logistics:
 - Implementing the actions of the European Innovation Partnership on Raw Materials
 - Increased sustainable wood mobilisation, including facilitate transport within and outside forests
 - Vigilance on recovered paper and roundwood exports

2013 EU Strategy: Selected activities (3/4)

- Coherence of EU legislation and costs arising:
 - Cumulative cost assessment (CCA) for F-BI – start 2014
 - EU Timber Regulation review in 2015
- EU climate policy:
 - Competitiveness aspects for the 2030 climate & energy framework
 - Carbon accounting for forest-based sector ("LULUCF" implementation)
- Structural adaptation:
 - Sectoral social partners' initiatives and EU Member States' facilitation of industrial restructuring

2013 EU Strategy: Selected activities (4/4)

- Education, training and skills, including shortages, ageing workforce:
 - **EU Sectoral Social Dialogue Committees (Wood, Furniture, Paper, Printing)**
- Innovation & RTD:
 - EU and MS funding Programmes e.g. Horizon2020, COSME, ESF
 - Co-ordination: **Forest-based Sector Technology Platform**
- Information, communication and image:
 - Sectoral initiatives

EU Strategy: priority initiatives (4/4)

2013-2014:

- Study on consumer information for furniture
- Call for commitments (CfC) under the EIP Raw Materials
- Cumulative cost assessment (CCA) of EU legislation on F-BI (launch)
- Scoping study on cascade use of wood (launch)
- Calls for tenders under Horizon 2020
- Renewal of EU F-BI Advisory Committee as Expert Group
(NB together with Social Dialogues, this is a major vehicle for sectoral inter-action)

2015-16

- Good practice guidance on wood mobilisation
- Good-practice guidance on resource & energy efficiency (SMEs)
- CCA results, linked to review of EU Timber Regulation



More information:

Forest-based Industries:

New functional mail-box: entr-f-bi@ec.europa.eu

Web-site:

http://ec.europa.eu/enterprise/sectors/wood-paper-printing/index_en.htm

EU “Raw Materials Initiative” web-page:

http://ec.europa.eu/enterprise/non_energy_extractive_industries/raw_materials.htm

European Innovation Partnership Raw Materials:

http://ec.europa.eu/enterprise/policies/raw-materials//innovation-partnership/index_en.htm

Horizon 2020:

<http://ec.europa.eu/research/horizon2020>