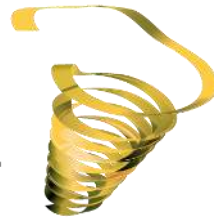


Forest-based Sector

Technology Platform



A 2030 Strategic Research & Innovation Agenda of the Forest-based Sector

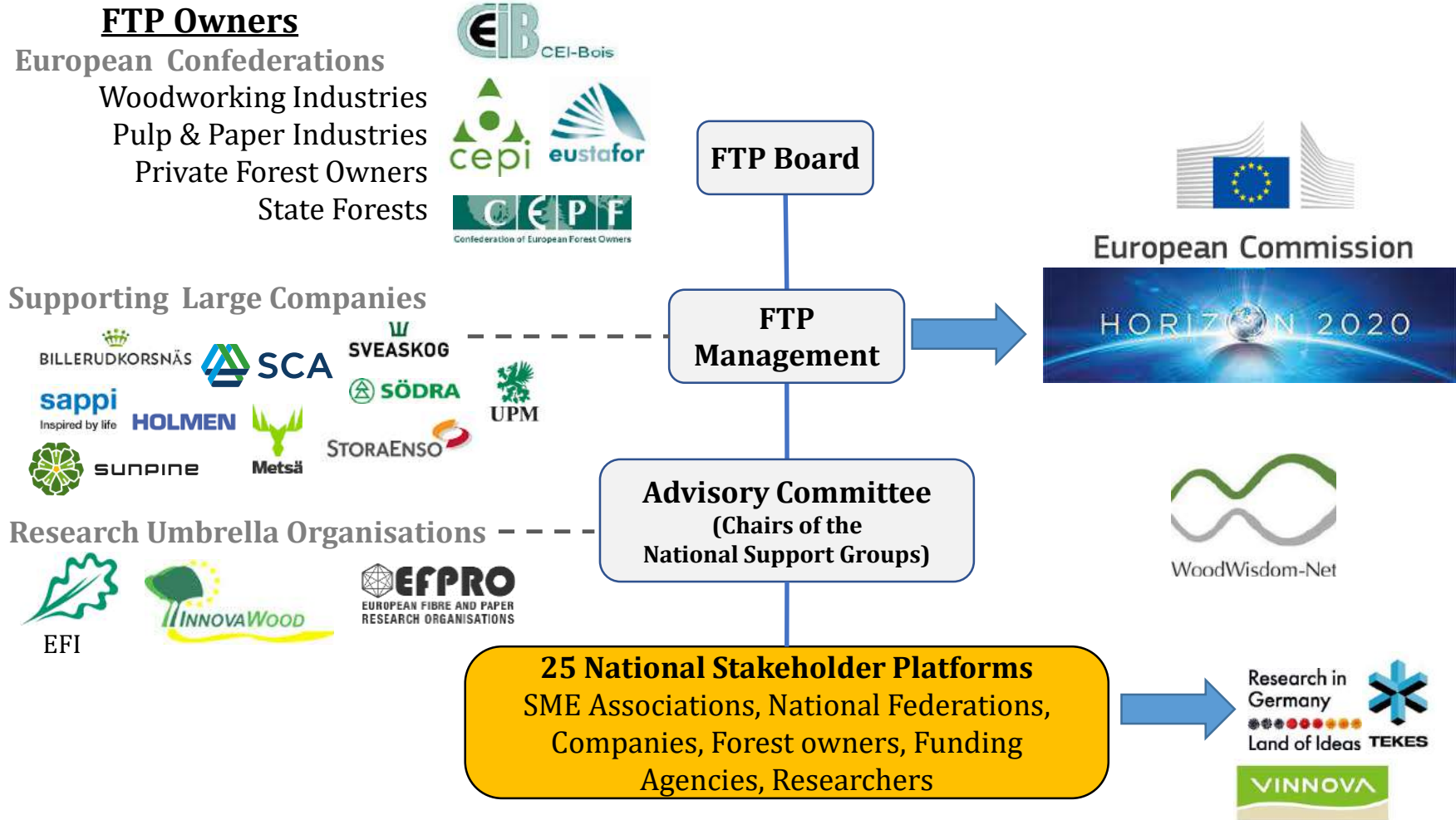
Johan Elvnert, Managing Director, FTP

ForestValue Research Programme Kick-Off Seminar

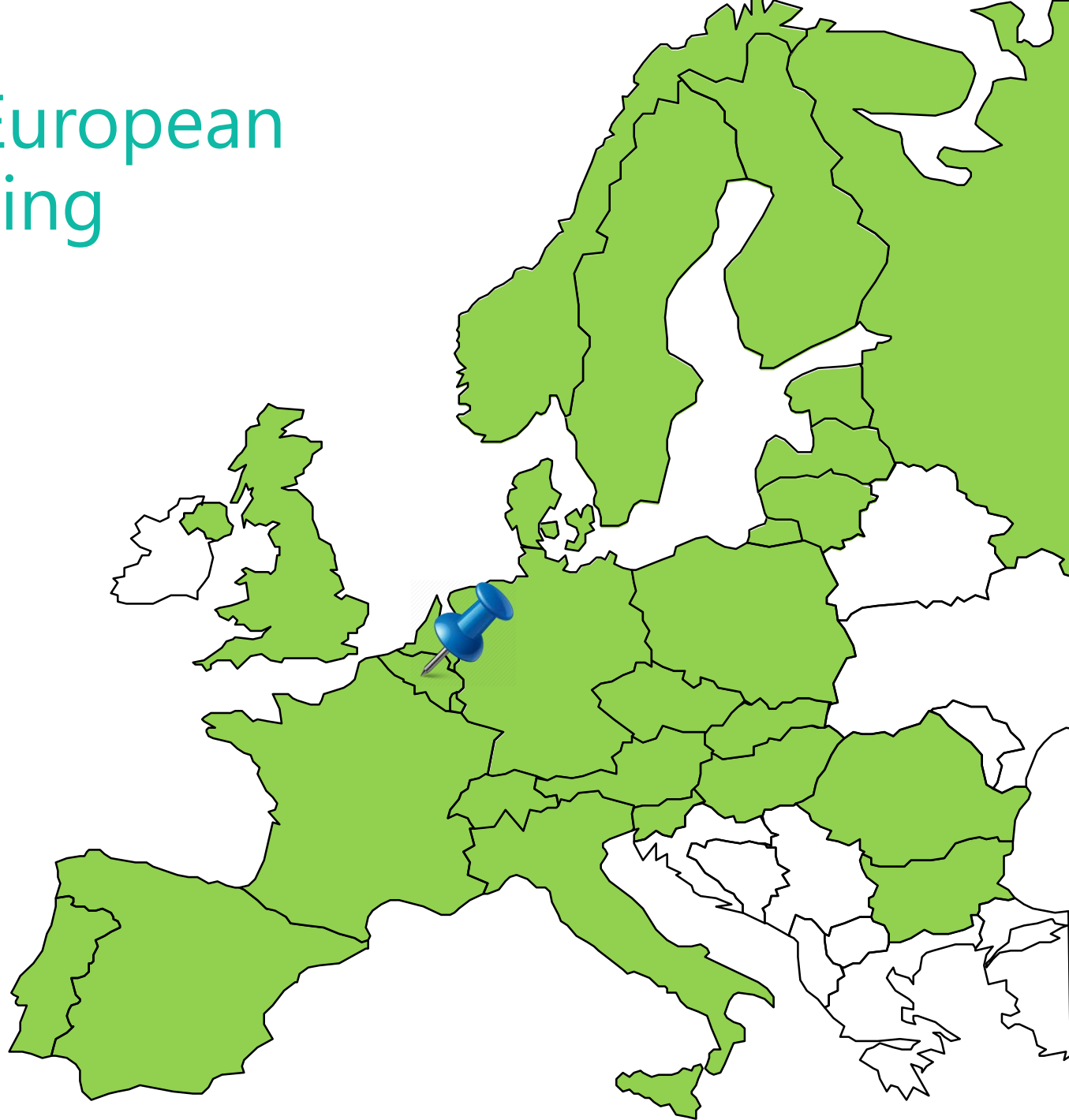
2019-05-24

The National Museum of Finland, Helsinki

FTP structure



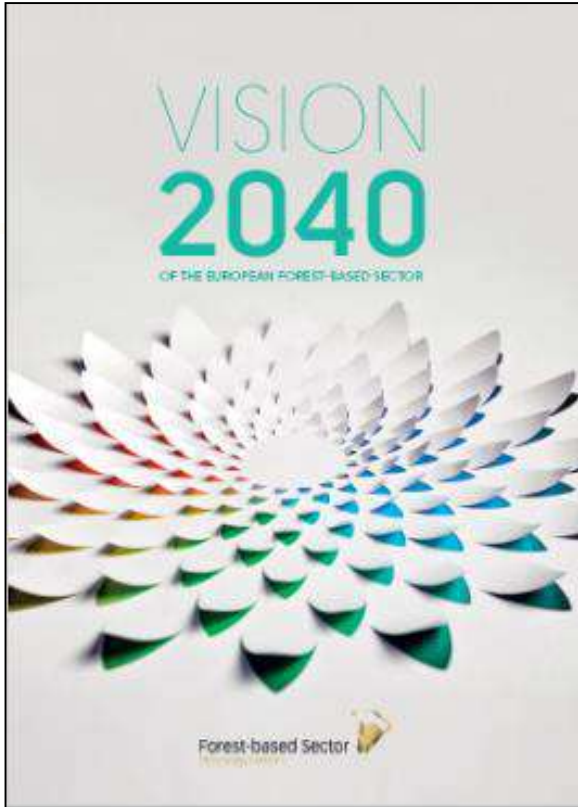
Centre of European policy making



Many goals, visions, political targets...

SUSTAINABLE DEVELOPMENT GOALS





<http://new-www.forestplatform.org/#!/pages/1>

ten vision targets for 2040

healthier living

Wood, the most commonly used renewable construction material in the world, has a bright future. In 2040, biobased construction in Europe has tripled its market share from the 2015 level, whilst the overall added value of the woodworking industries has doubled. Increased value will come from new products and services, as well as more widespread use of energy-saving, modular and flexible housing structures and functional furniture.

New fibre-based products and 80 per cent lower CO₂ emissions

The forest-fibre and paper industry is well on its way to reaching the targets – set out in the CEPI 2050 Roadmap – to cut its carbon emissions by 80 per cent, while creating 50 per cent more added value. While established product segments, mainly paper, packaging and hygiene, have evolved and remain the main source of income, almost half of the new added value is expected to come from other new biobased products such as textiles and green chemicals.





Vision Targets defining our ambition

VT 2 : Increased, sustainable wood production and mobilization

- “Forest growth is increasing, leading to increased CO2 sequestration. Management practices are being further optimized for even higher productivity and stand quality. The creation of climate change-resilient and stress-tolerant forests is particularly important. Research, innovation and careful, long-term forest management have increased harvesting possibilities in Europe by 30 per cent, between now and 2040.”

Reaching VT2: Value to the EU economy

+120 Million m³ timber harvested each year

Ca + 5 bn Euro value for forest owners

Or alternatively:

+ 24 Mtoe = 20 days of EU:s total petroleum products consumption

+ ca 20 bn Euro value

If utilised by the forest-based industries as efficient as today:

+75 bn Euro in value

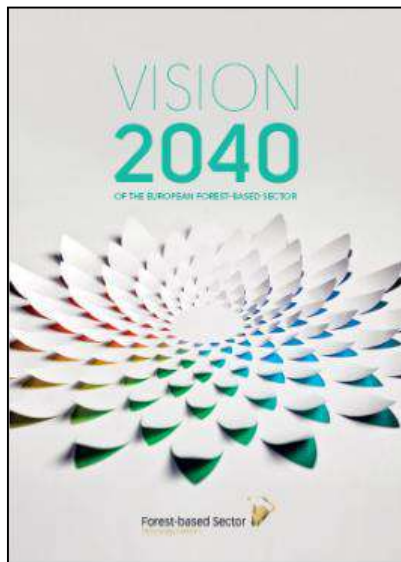
Quantifiable Vision Targets in short

- VT 2. "30% more forest biomass out of forests by 2040"
- VT 3. "90% recovery + 70% recycling rates by 2040"
- VT 4. "Increase tenfold the added value from non-wood forest products and services (e.g. forest tourism)"
- VT 8. "Electricity + biofuels from EU forest-based sector equivalent to 100 million oil barrels per year"
- VT 9. "Tripling of value from wood-based construction from 2015-2040 (reaching 200 billion Euro)"
- VT 10. "On good way to reduce carbon footprint with 80% until 2050 (CEPI 2050)"



The SRA – from Vision to Implementation

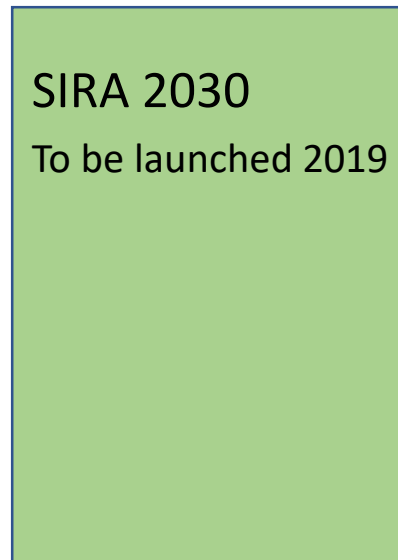
Defines the
Vision Targets



2018



Outlines Challenges and
matching R&I Activities



2019



Implementation phase

- Influence Horizon Europe and national funding programmes!
- Encourage high-impact RD&I projects!
- Inspire technology investments!
- Measure progress

2020 - 2030

SRA Revision schedule 2019

| Month | January | | | | February | | | | March | | | | April | | | | May | | | | June | | | | July | | | | August | | | | September | | | | October | | | | Nov. | | | | | | | |
|---------------------------|---------|----|----|----|----------|----|----|----|-------|----|---------|----|-----------|---|----|----|-----|---|---------|----|------|---|-----------|----|------|---|---|----|--------|----|-----------|----|-----------|----|---|---|---------|----|----|---|------|----|----|---|----|--|--|--|
| Monday date | 7 | 14 | 21 | 28 | 4 | 11 | 18 | 25 | 4 | 11 | 18 | 25 | 1 | 8 | 15 | 22 | 29 | 6 | 13 | 20 | 27 | 3 | 10 | 17 | 24 | 1 | 8 | 15 | 22 | 29 | 5 | 12 | 19 | 26 | 2 | 9 | 16 | 23 | 30 | 7 | 14 | 21 | 28 | 4 | 11 | | | |
| Important Meetings | | | | | | | | | | | AC mtg? | | Board Mtg | | | | | | AC mtg? | | | | Board mtg | | | | | | | | Board mtg | | | | | | | | | | | | | | | | | |
| FTP Office draft 1.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Setting up editing team | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Structure suggestion | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prep. Consult. v2.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1st stakeholder consult. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Prep Consult. v3.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 2nd stakeholder consult. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Sponsor COs consult. | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| prep report to board v4.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| post board report v5.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Final Content to designer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Design Proposal | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Final OK design | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Layout entire doc. v6.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| 1st & 2nd proofread | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Corrections by designer | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Final proof v7.0 | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Printing | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| Transport & Delivery | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |

Structure of the new SRA (Vision Targets – Challenges – Activities)

Vision Target 2

Challenge A: Improving forest propagation material to increase productivity and resilience

Changing growing conditions and new demands from more diversified forest-based products call for improved understanding of the genetics of trees. This refers to growth dynamics affected by climate change, susceptibility to interlinked disturbances including native and exotic pests, but also biomass characteristics relevant for the production efficiency, quality and value of traditional and novel wood products. Research is needed on new methods and strategies for tree breeding and propagation material provision, cultivating plants, establishing new forests, and effective regeneration. This has to include the design of protection measures for endangered genetic resources of high interest for climate change adaptation, and the design of measures for assisted migration. The consequences on the provision of high-quality seeds and plants of native and introduced species that grow better under future climate conditions, are more resistant to pest and diseases, and provide more suited wood qualities have to be analysed.

- Develop new tree breeding strategies including new genetic tools
- Collect genotype and phenotype data including genetic diversity from different species, regions, ages etc.
- Develop new technologies for mass propagation of seedlings

Challenge B: Utilizing the digital revolution for precision forestry

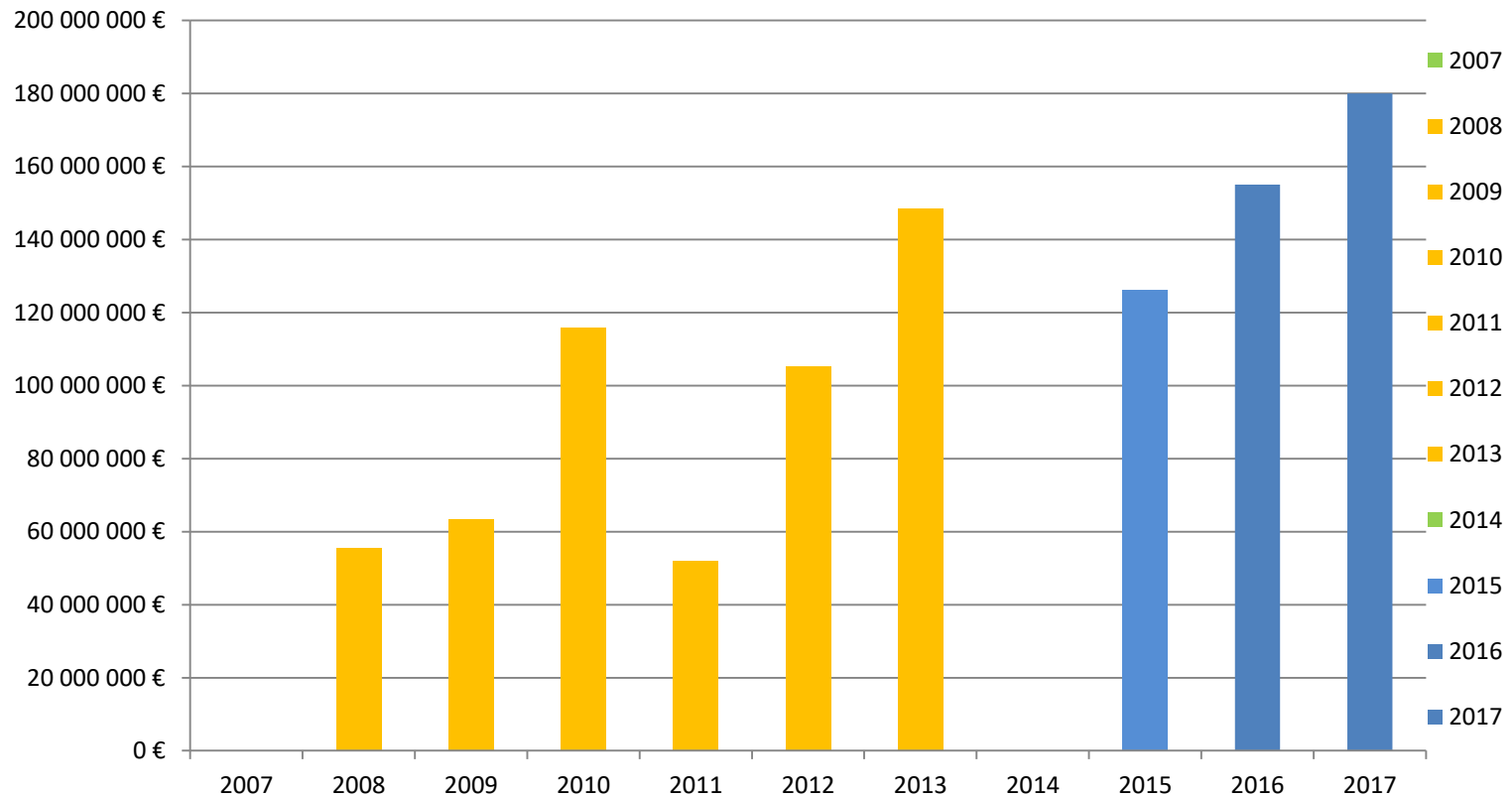
Challenge C: Empowering small-scale forest owners

Challenge D: Harnessing novel technologies and automation in forest operations

Challenge E: Analyzing forest-based product markets and material flows



EU RTI-funding to the forest-based sector over time as a KPI for the FTP Vision



Source: db.forestplatform.org

The EU contributes ca 5% of the total research budget

This means that EU funding added ca 20% on top of the industry's contribution

Very Intensive period in Brussels

– EU strategy for 2050 is to be decided now!

- The European Commission's strategic, long-term vision for **A prosperous, modern, competitive and climate neutral economy by 2050 – A Clean Planet for all**. Is being discussed at several instances. It will also be used in the preparations of the Heads of States to the 9 May 2019 Sibiu EU Council
- https://ec.europa.eu/clima/sites/clima/files/docs/pages/com_2018_733_en.pdf
- European Parliament voting on proposal for regulation on Sustainable Financing and developing a taxonomy for what is considered "green" sectors/investments.



Save the date for the SRA launch!

Hosted under the auspices of the Finnish EU-Presidency

FTP Annual Conference 2019: The new Strategic Research Agenda of the forest-based sector in Europe

- 27 November 2019
- Aalto University, Helsinki, Finland
- www.forestplatform.org



