

National Direction of Forest Industry Development

We work to promote forest expansion and to
ADD VALUE IN THE FOREST INDUSTRY CHAIN
in a competitive and sustainable way



Ministerio de Agricultura,
Ganadería y Pesca
Presidencia de la Nación

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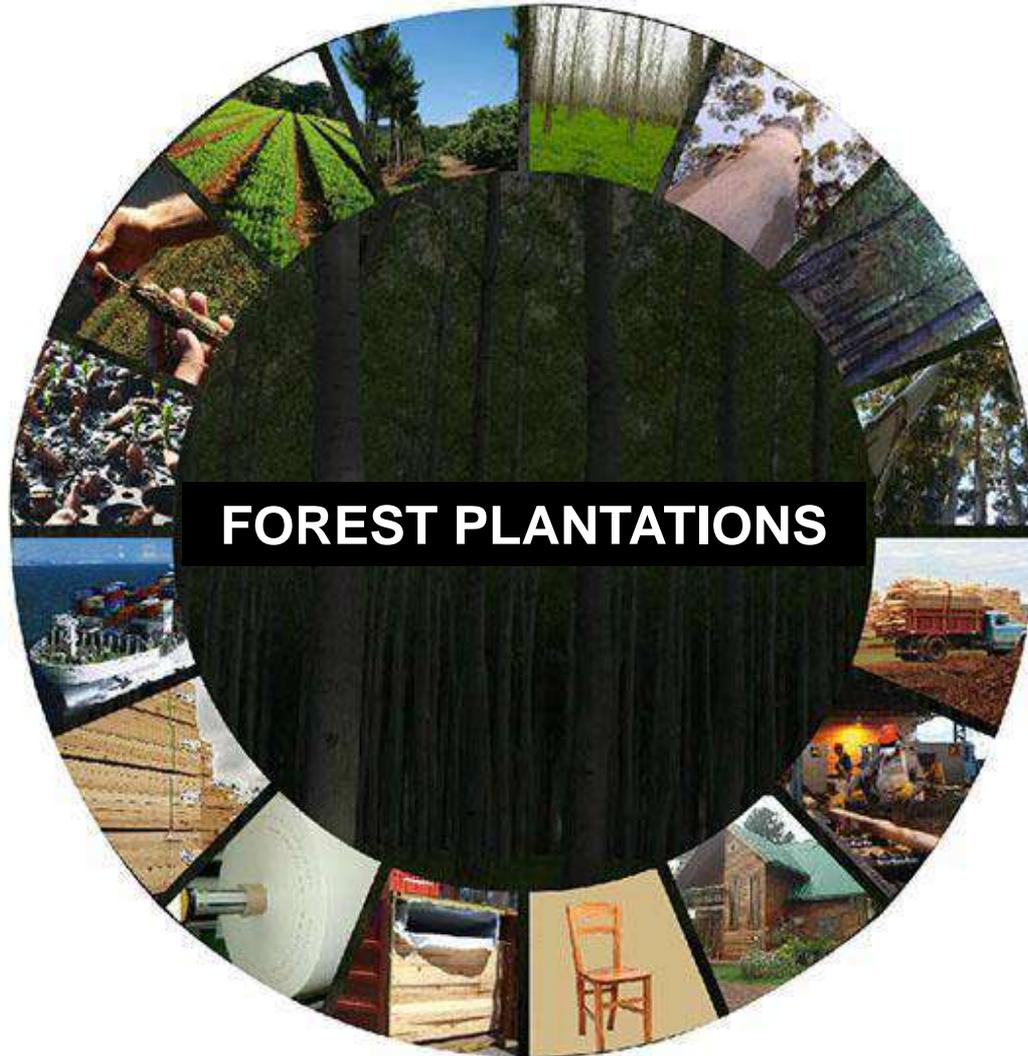
Mission:

Promote the Forest Industry Sector as a strategic driver of economic and social development

Objective:

Increase the implanted forest surface and the forest industry production in a sustainable and competitive way

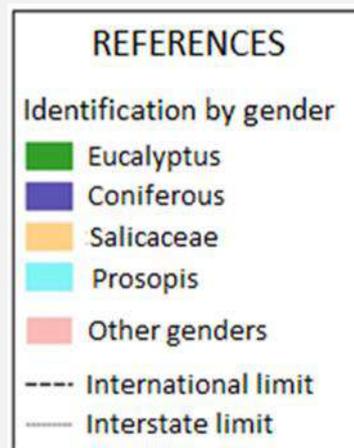
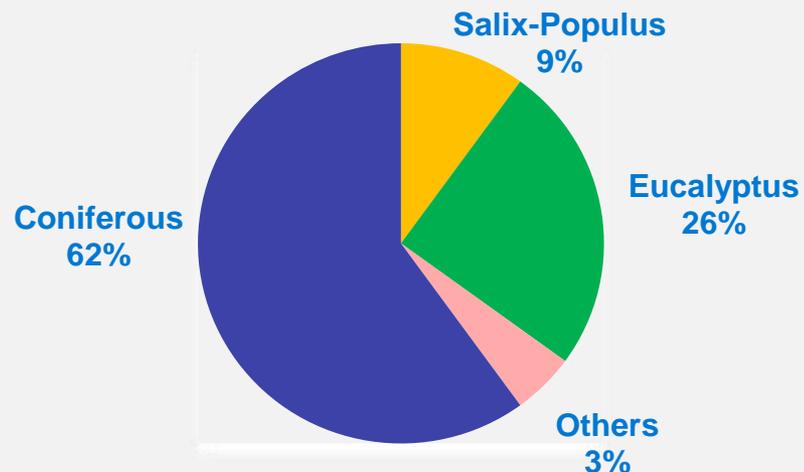




Forest Sector - Forest Plantations



Distribution of forest plantations in Argentina

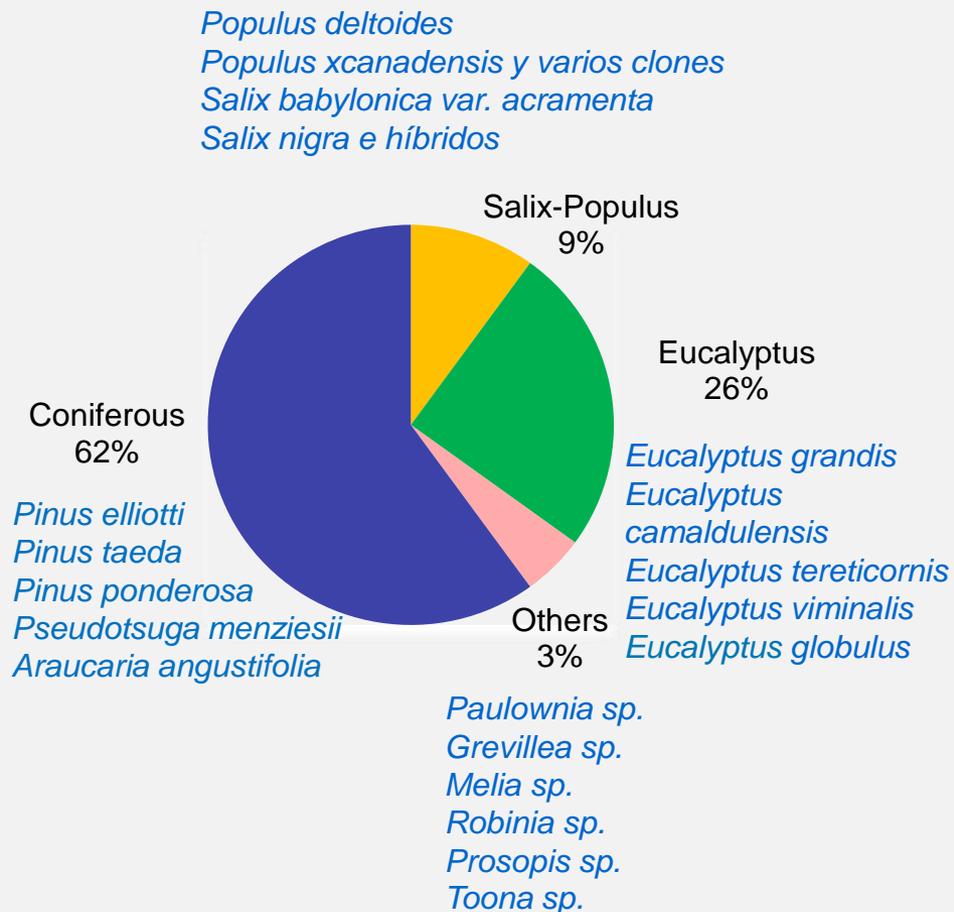


Forest plantations estimated: 1,3 millions ha

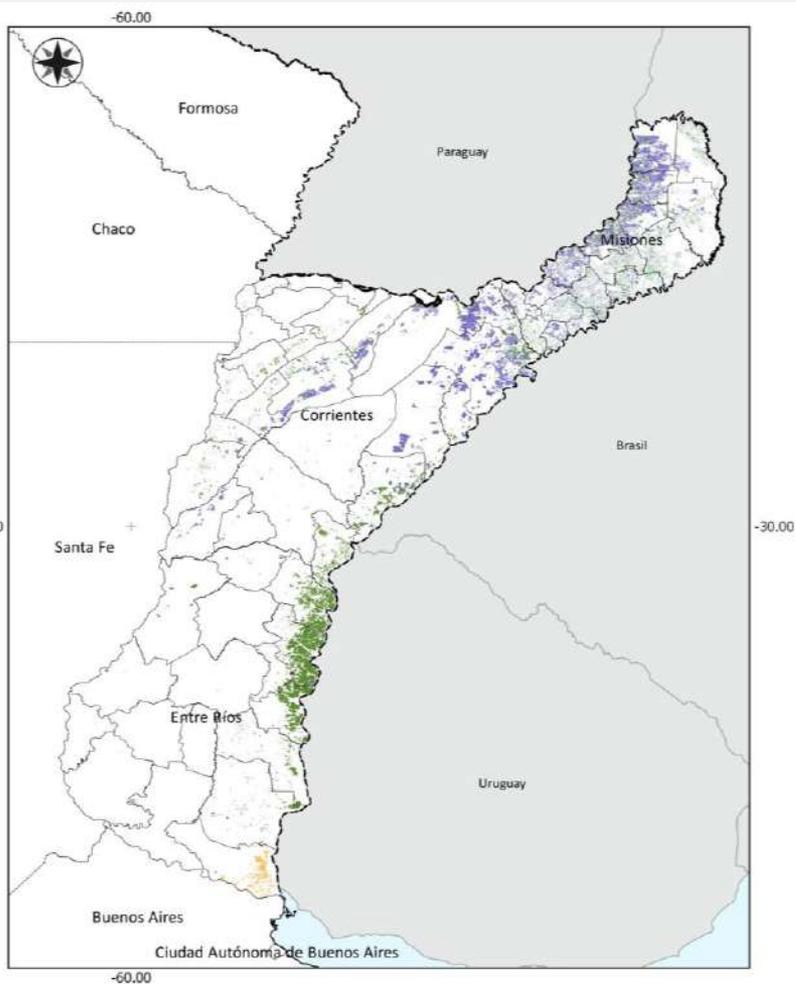
Yields and rotations of the main implanted species

Species	Rotation (years)	Yield (m ³ /ha/years)
<i>Eucalyptus grandis</i>	08-15	35-50
<i>Araucaria angustifolia</i>	25-30	15-18
<i>Pinus elliottii</i>	18-20	20
<i>Pinus taeda</i>	16-20	20-40
<i>Salix</i> sp.	10-12	20
<i>Populus</i> sp.	10-12	23

Source: National Direction of Forest Industry Development (NDFID)



The Mesopotamian region represents the 78,3% of forest plantations



Source:
 - Dirección Nacional de Desarrollo Foresto Industrial (DNDFI) - MINAGRO (2018)
 - Inventario de Bosques Cultivados de la Provincia de Misiones (2015-2016)
 - Actualización Inventario de plantaciones forestales de la Provincia de Corrientes (2015)

MISIONES				
Coniferous 348.305 ha	Eucalyptus 40.902 ha	Others 16.617 ha	Total 405.824 ha	
CORRIENTES				
Coniferous 352.171 ha	Eucalyptus 161.972 ha	Others 2.567 ha	Total 516.710 ha	
ENTRE RÍOS				
Coniferous 14.156 ha	Eucalyptus 112.785 ha	Salix-Populus 23.279 ha	Others 577 ha	Total 150.797 ha

REFERENCES

Identification by gender

■ Eucalyptus

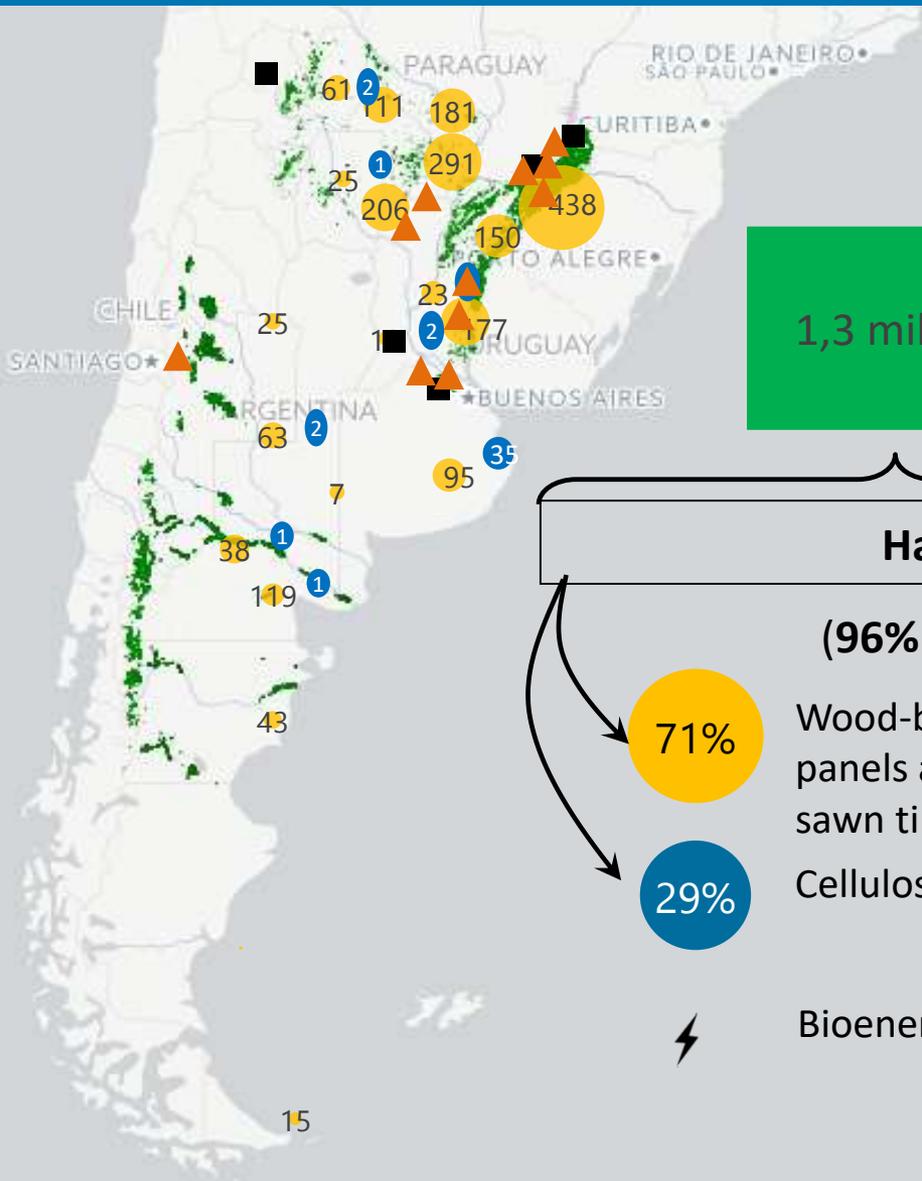
■ Coniferous

■ Salicaceae

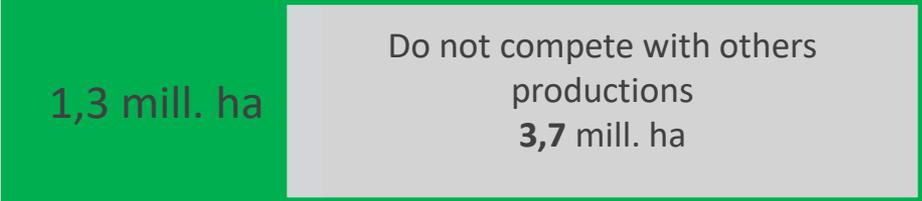
■ Other genders

Total: 1.073.331 ha

Forest Sector - Forest Industry

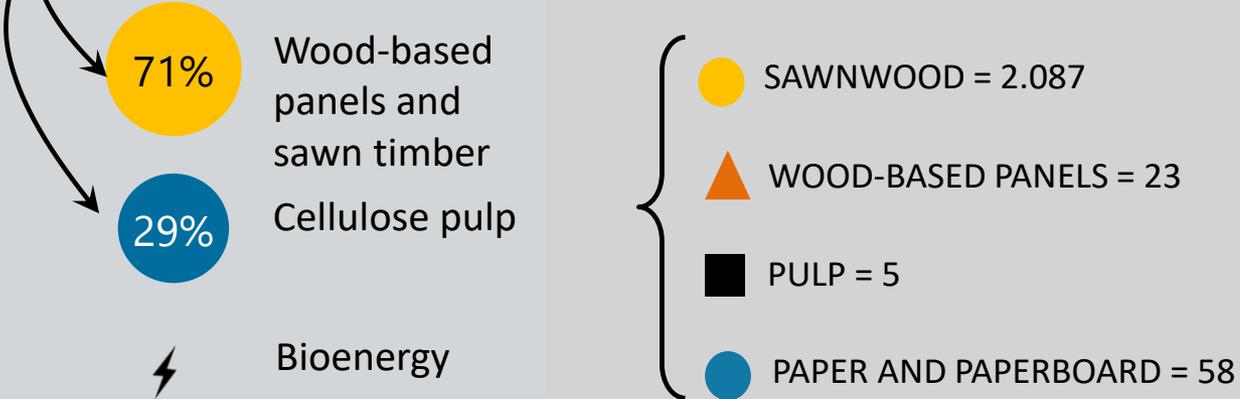


POTENTIAL AREA:



Harvest (2017): 15,7 mill. m³

(96% plantation – 4% native forest)



Wood transformation – YEAR 2017

ESTIMATED AVAILABLE OFFER: 25.300.000 m³

Only the Mesopotamian region is considered (Genders: Pinus and Eucalyptus)

HARVEST : 15.700.000 m³

29%

CHEMICAL TRANSFORMATION:

Cellulose pulp: 672.175 t

Bagasse pulp
108.795 t

Recycled paper

Paper and paperboard

- . Domestic and sanitary paper
- . Paper for graphic purposes
- . Other papers

1.263.586 t

71%

MECHANICAL TRANSFORMATION:

4.381.000 m³

Sawnwood
76,22%

Fibreboard
12,76%

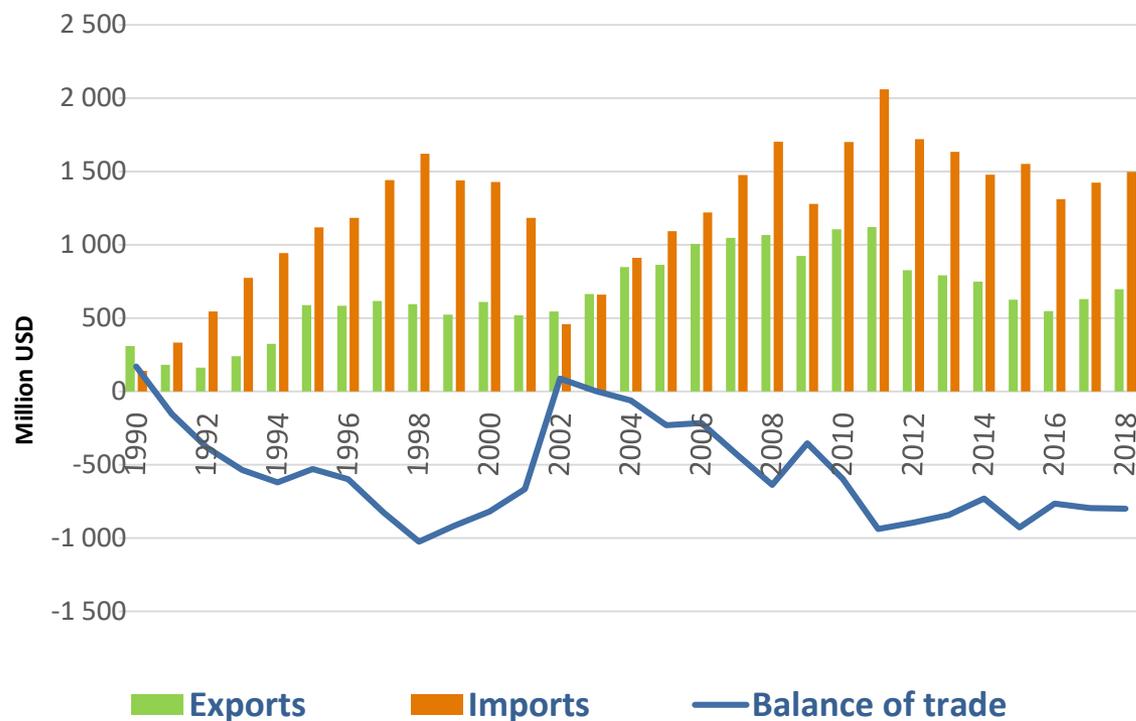
Particle board
9,19%

Plywood
1,81%

Veneer Sheets
0,02%

- . Furniture
- . Other manufactures
- . Wood construction

Exports, Imports and Balance of trade



TRANSACTIONS OF FOREST PRODUCTS 2018

IMPORTS: 1.500.000 million US\$

EXPORTS: 700 million US\$

BALANCE OF TRADE: - 800 million US\$

Source: Own elaboration using INDEC data (provisional for the year 2018)

Law N° 25.080 “Of Investments for Forests Plantations” extended by its similar Laws N° 26.432 and N° 27.487

Sanctioned on 16/12/1998. Enacted on 15/01/1999

Extended on 26/11/2008 for 10 years (Law N° 26.432)

Extended on 12/12/2018 for 10 years (Law N° 27.487). Valid until 15/01/2029

SCOPE

It promotes the expansion and new forestry ventures in forests plantations and in the enrichment of native forest, as well as the new forestry component and the expansion of forest industry ventures

Environmental Sustainability and Insurance Program

Green Insurance

Financing of Law N° 25.080

- From August the 1st, 2018
- Composed of voluntary agreements contributions that are reached with the insurance companies that issue auto insurance policies
- 1% financial contribution on vehicle and motorcycle insurance premiums
- 90% destined to the financing of Law N° 25.080 and the remaining 10% to the development of activities aimed at promoting the insurance culture
- To the date, 11 insurance companies involved
- The expected annual contribution for 2019 is around \$ 650 million



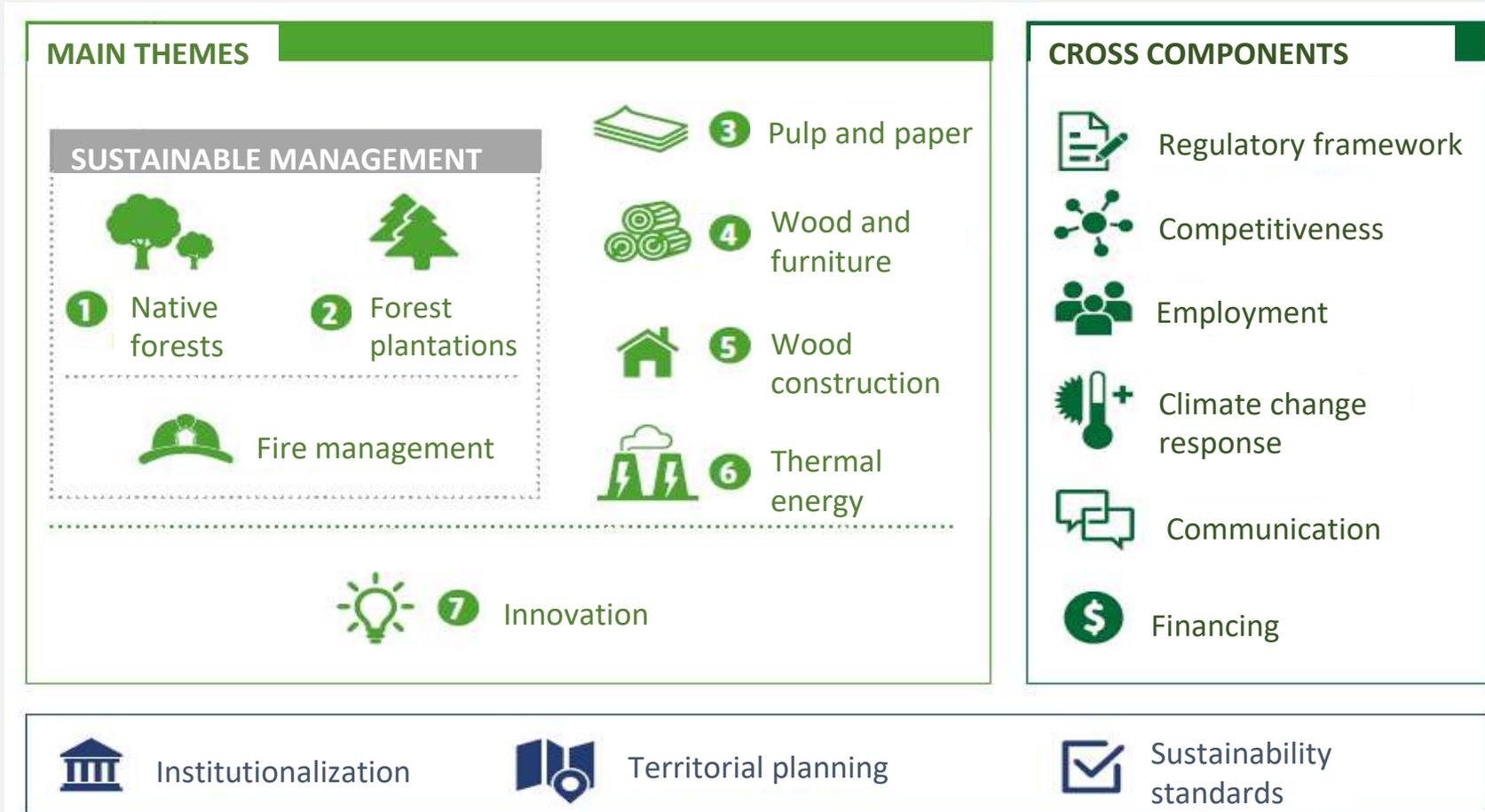
Forest Industry Competitiveness Board

- The National Government recognizes the forest industry sector as strategic for the social, economic and environmental development of the country
- 8 Meetings held with the President of the Nation
- Conformation of 11 Technical Boards involving 8 Ministries / Government Secretariats
- Realization of Boards in the Provinces of Misiones, Corrientes, Entre Ríos, Buenos Aires and in the Patagonian Region



Forest and Forest Industry Strategic Plan Argentina 2030

Strategic Plan's Structure



Expected impact by 2030: highlights



Increase the implanted forest surface to 2 million hectares (+50%)



Attract 7 thousand million USD in investments, industrializing different regions across the country



Maintain and increase investments in infrastructure (trains, ports, energy, comms, etc.) critical to scale other activities in several provinces



Create 187 thousand quality jobs



Revert the historical deficit in the trade balance, exporting 2,500 million USD



Value the native forests through their sustainable management and the recognition of the ecosystem services they provide to nearby communities and society as a whole



Increase the added value of the forest industry value chain, through the support of permanent policies for Research, Development and Innovation (I+D+i)



Contribute to climate change mitigation and adaptation. Provide to the compliance of the national commitment (NDC goal of 483 Mton CO₂ eq), through the reduction of GHG emissions and increased storage due to the sustainable management of native and implanted forests and along the whole value chain



Ensure that all projects and practices related to the present Plan comply with sustainability standards and safeguard places of high conservation value, biodiversity and cultural assets

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Thank you for your attention!





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