# Status and Challenges for IMPFs in Brazil

## The Forests Dialogue

## Instensively Managed Planted Forests

André Guimarães
Instituto BioAtlântica

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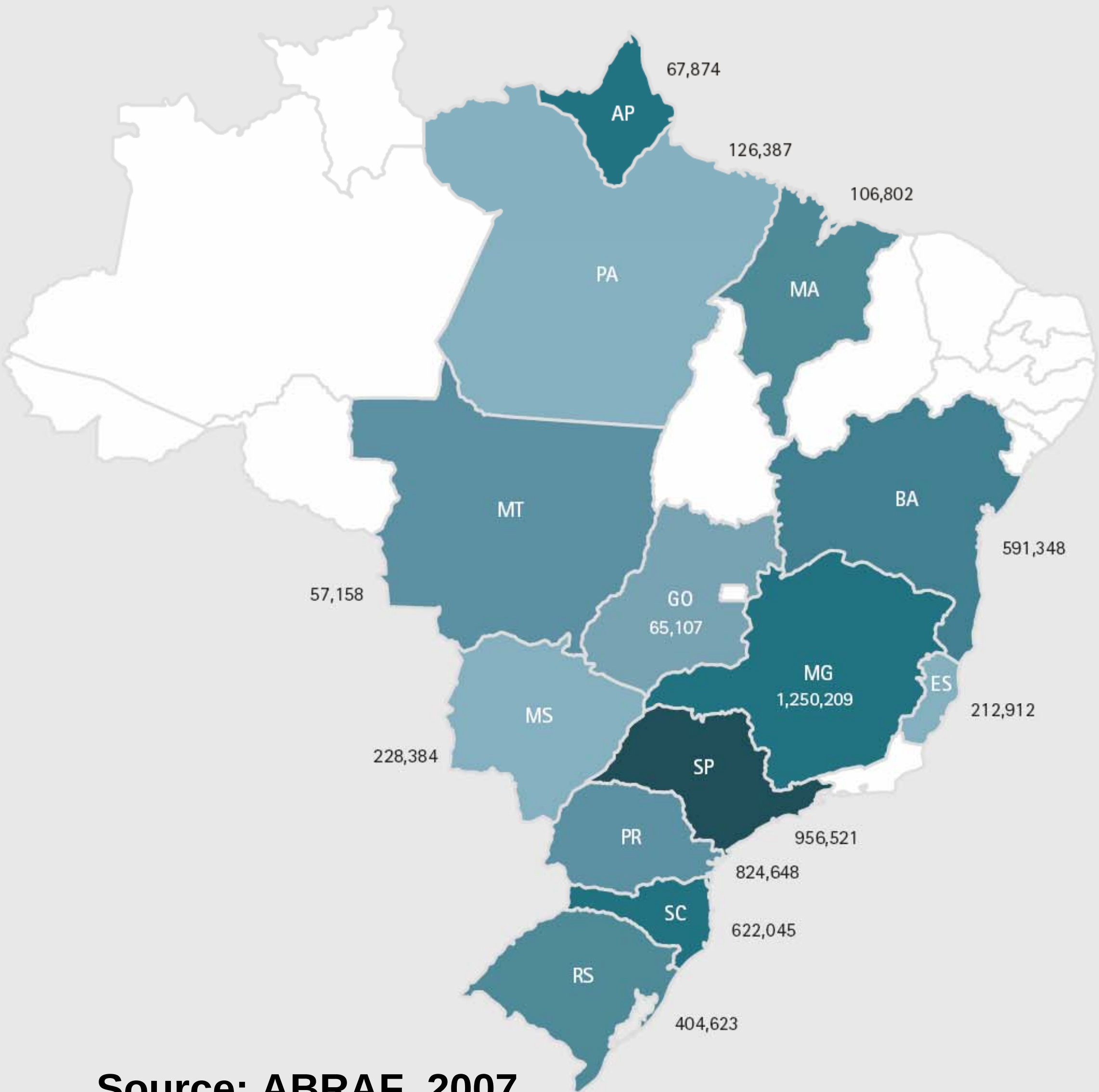
# PLANTED FORESTS IN BRAZIL AT A GLANCE

Map 1.03 Area and Distribution of Total Pine and Eucalyptus Plantations in Brazil (2005-2007)

TOTAL (ha)[1]

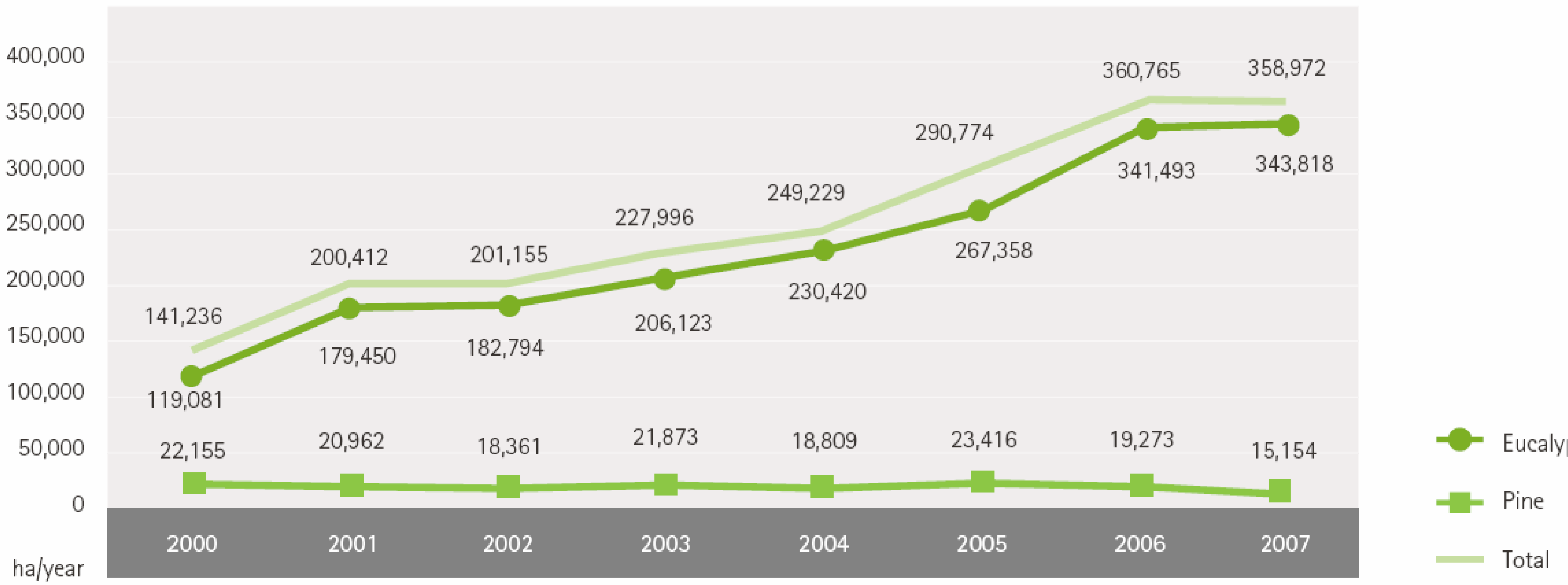
| STATE | 2005 | 2006 | 2007 |
|---|---|---|---|
| Minas Gerais | 1,216,744 | 1,235,744 | 1,250,209 |
| São Paulo | 946,542 | 963,354 | 956,521 |
| Paraná | 792,768 | 808,361 | 824,648 |
| Santa Catarina | 588,245 | 601,333 | 622,045 |
| Bahia | 582,132 | 594,992 | 591,348 |
| Rio Grande do Sul | 364,770 | 365,623 | 404,623 |
| Mato Grosso do Sul | 152,341 | 147,819 | 228,384 |
| Espírito Santo | 208,933 | 212,208 | 212,912 |
| Maranhão | 60,745 | 93,285 | 106,802 |
| Pará | 106,182 | 115,955 | 126,387 |
| Amapá | 87,928 | 78,963 | 67,874 |
| Goiás | 60,872 | 64,045 | 65,107 |
| Mato Grosso | 42,460 | 46,153 | 57,158 |
| Others | 31,112 | 45,582 | 46,186 |
| TOTAL | 5,241,774 | 5,373,417 | 5,560,203 |

Source: Various sources; adapted by STCP (See Methodological Notes, Section 5.1)
[1] Pinus and Eucalypt.




**Source: ABRAF, 2007**

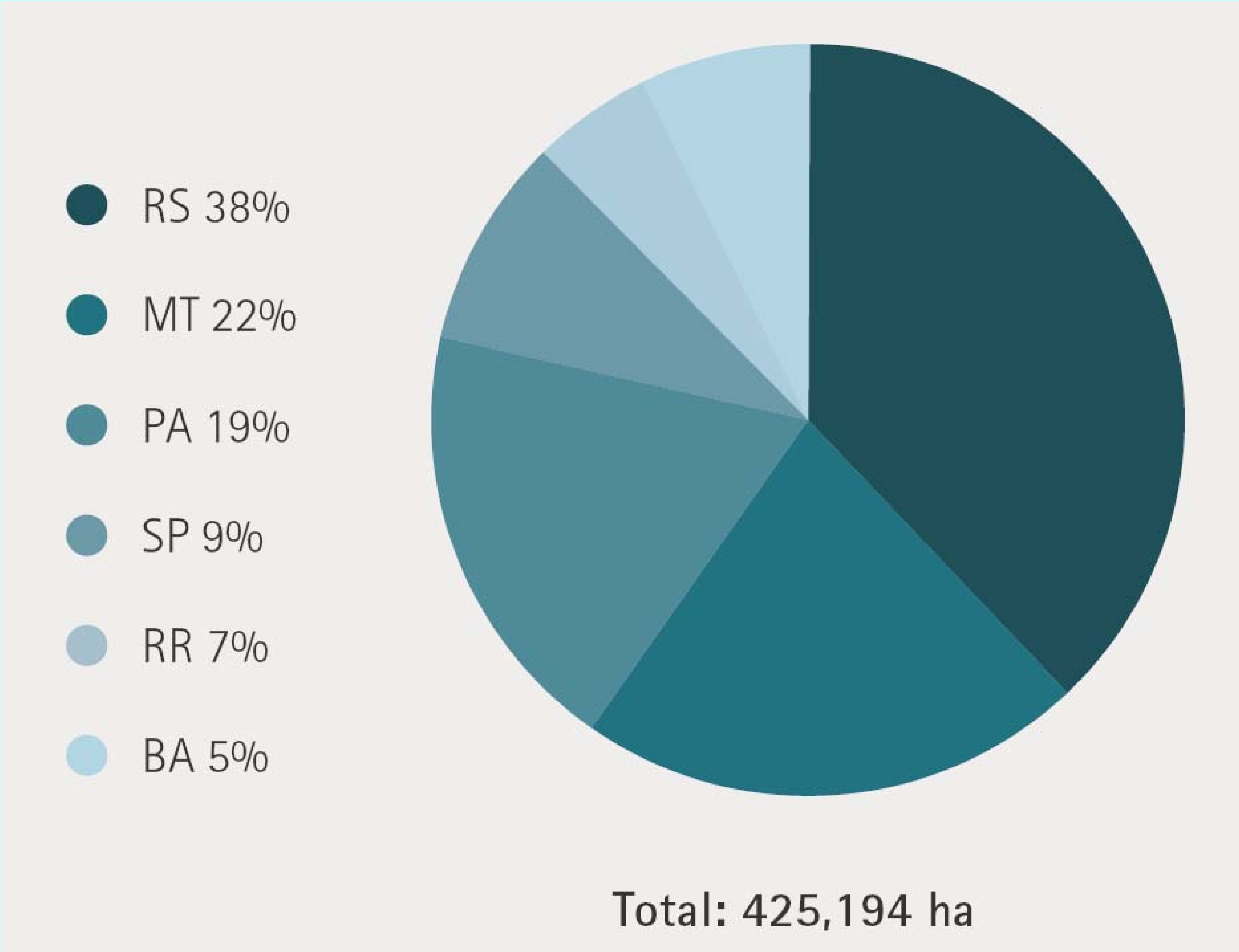
Figure 2.03 Evolution of Annual Planting of Forest Plantations[1] by ABRAF Member Companies by Species (2000-2007)




Source: ABRAF Member Companies; STCP, 2007.

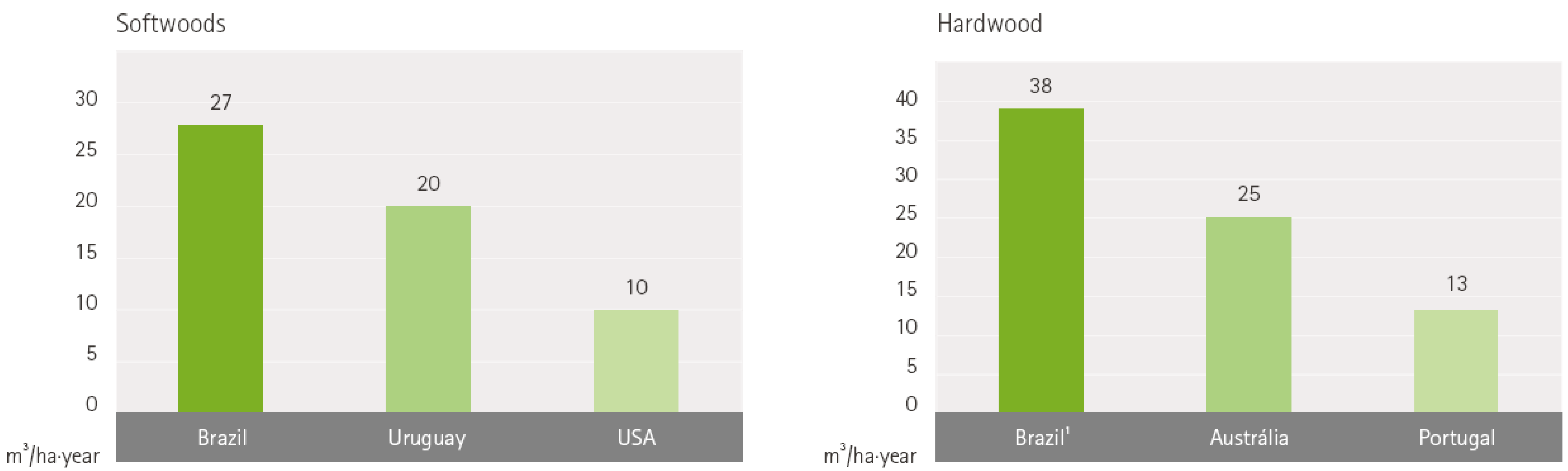
[1] It includes forest expansion and reform.

Figure 1.06 Geographical Distribution of Planted Forests with Other Species in Brazil (2007)




Source: ABRAF Member Companies; Parica Research Center; Various Companies; STCP, 2007.

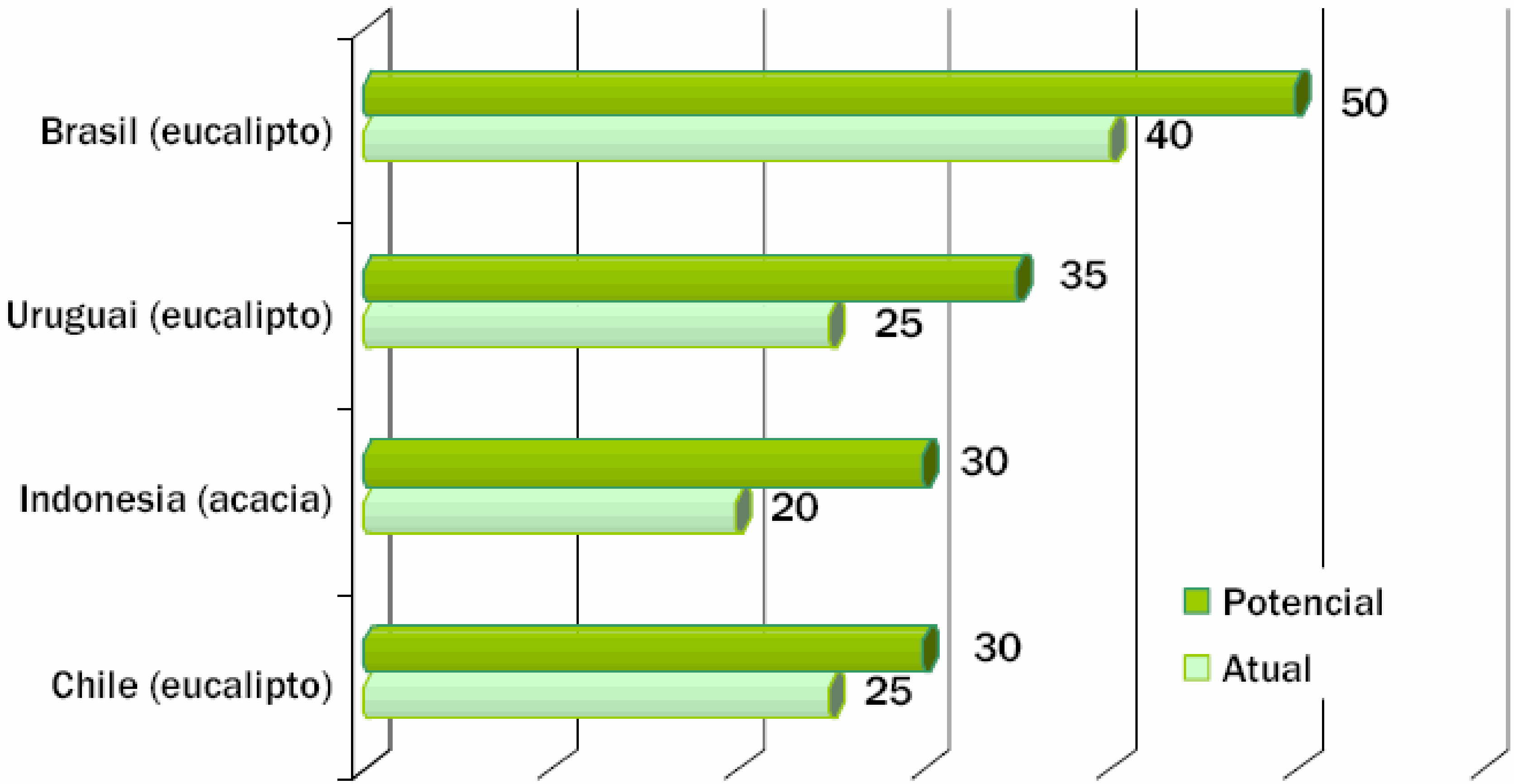
Figure 2.06 Comparison of Softwood and Hardwood Forest Productivity in Brazil and in Selected Countries




Source: STCP Database.

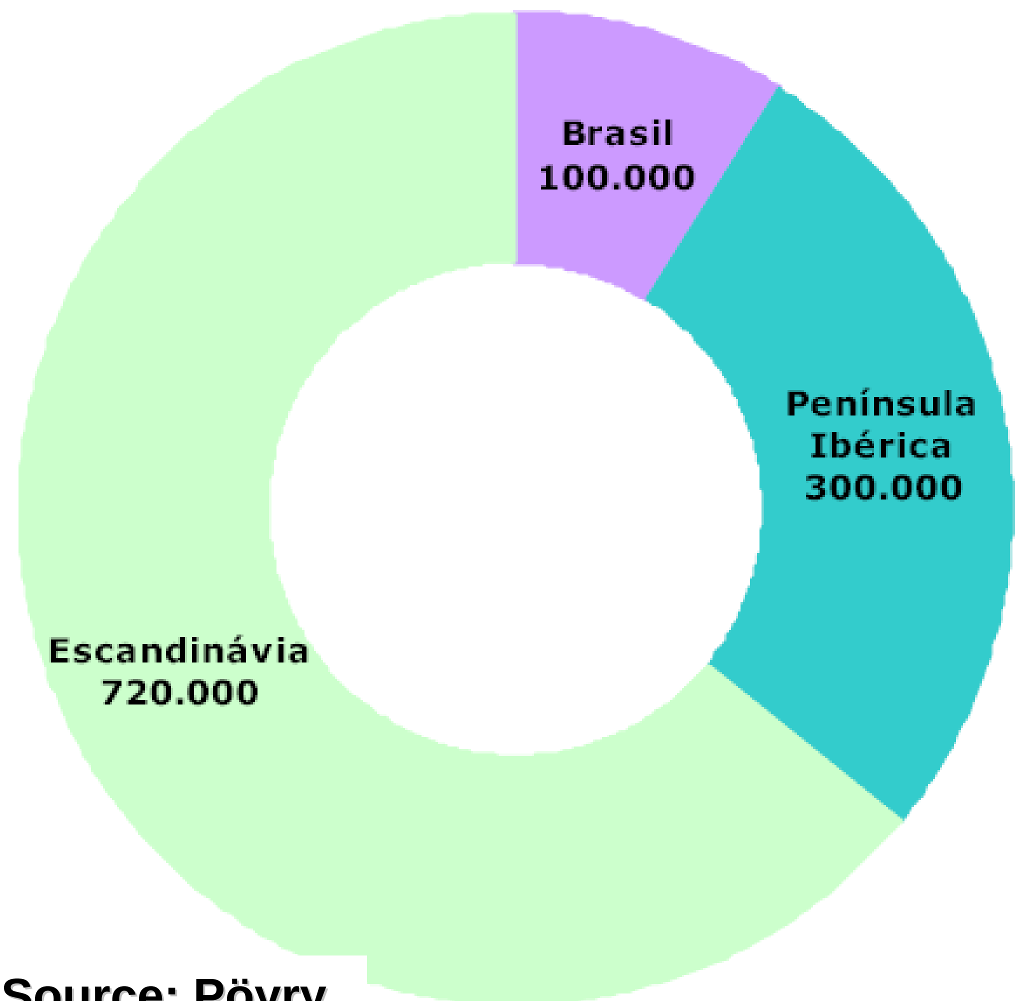
[1] *Eucalyptus spp (hybrid).*

# Fast Growing Forests Productivity (m3/ha/year)



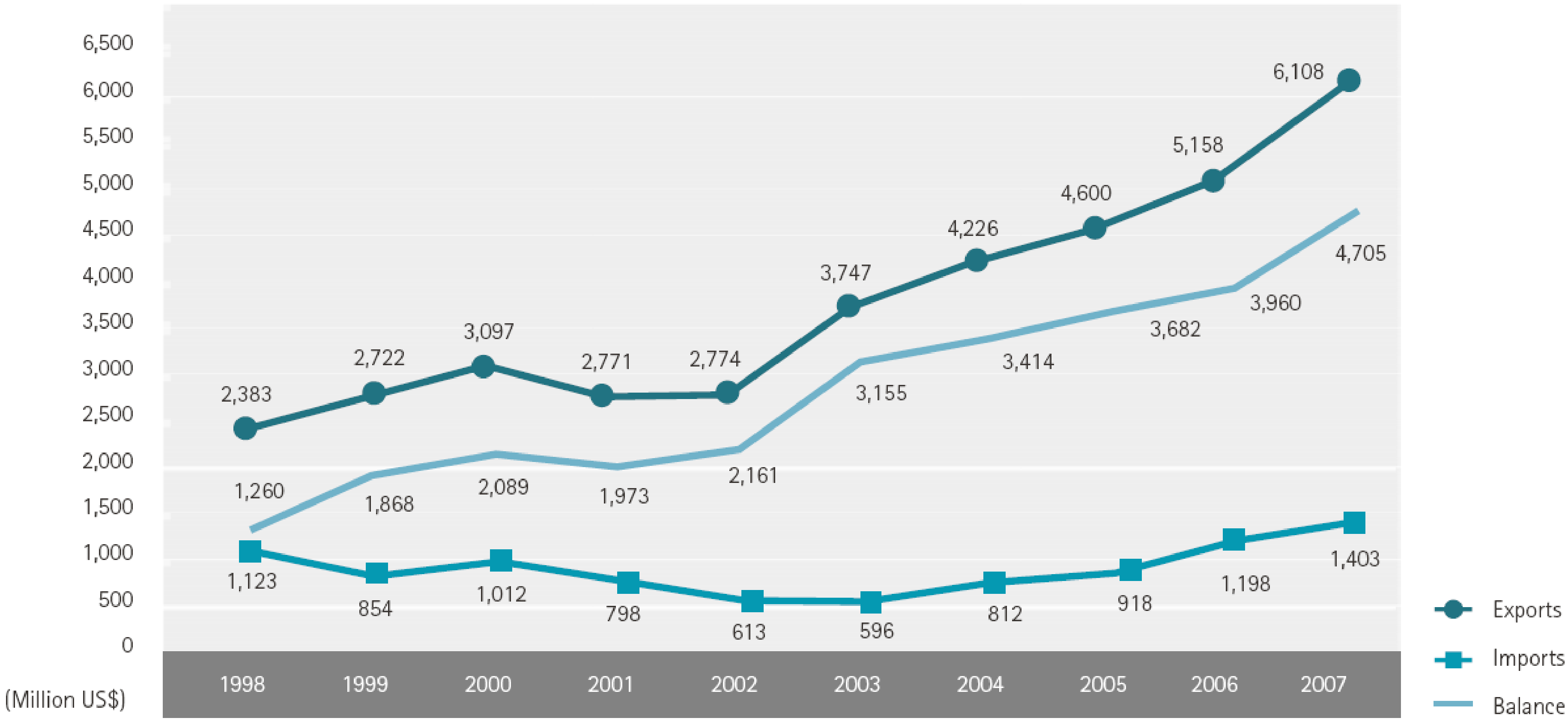

**Source: Pöyry**

# Forest area to produce 1 million tons of Cellulose/year (hectars)




**Source: Pöyry**

Figure 3.10 Trade Balance of Forest Plantation-Based Products in Brazil (1998-2007)




Source: SECEX, 2007.

# POSITIONING BRAZIL IN THE WORLD

# World's Planted Forests Area (in 1,000 hectars)

| PAÍSES | ÁREA TOTAL DO PAÍS | AREA DE FLORESTAS PLANTADAS | % |
|---|---|---|---|
| JAPÃO | 37.780 | 10.000 | 26,47 |
| ÍNDIA | 328.726 | 32.600 | 9,92 |
| PORTUGAL | 9.191 | 800 | 8,70 |
| CHINA | 959.696 | 45.000 | 4,69 |
| INDONÉSIA | 205.000 | 9.000 | 4,39 |
| ESPANHA | 50.599 | 1.900 | 3,76 |
| CHILE | 75.609 | 2.200 | 2,91 |
| ESTADOS UNIDOS | 937.261 | 16.000 | 1,71 |
| **BRASIL (2006)** | **851.488** | **5.500** | **0,65** |
| **- CELULOSE E PAPEL** | | **1.700** | **0,20** |

Fonte: FAO/BRACELPA

# Largest World Pulp and Paper Producers - 2007

| CELULOSE | | PAPEL | |
|---|---|---|---|
| País | mil toneladas | País | mil toneladas |
| 1. EUA | 53.215 | 1. EUA | 84.073 |
| 2. Canadá | 23.677 | 2. China | 65.000 |
| 3. China | 18.160 | 3. Japão | 31.106 |
| 4. Finlândia | 13.066 | 4. Alemanha | 22.655 |
| 5. Suécia | 12.240 | 5. Canadá | 18.170 |
| 6. Brasil | 11.916 | 6. Finlândia | 14.151 |
| 7. Japão | 10.884 | 7. Suécia | 12.066 |
| 8. Rússia | 7.370 | 8. Coréia do Sul | 10.703 |
| 9. Indonésia | 5.672 | 9. Itália | 10.009 |
| 10. Chile | 3.550 | 10. França | 10.006 |
| 11. Índia | 3.250 | 11. Brasil | 8.966 |
| | | 12. Indonésia | 8.862 |
| TOTAL MUNDO | 192.177 | | 381.551 |

**Source: RISI**

# CHALLENGES FOR IPMFs

# IN BRAZIL

## Brazilian Territory Land Uses (in million hectars)

| | |
|---|---|
| Floresta Amazônica | 345 |
| Pastagem | 220 |
| Áreas Protegidas | 55 |
| Lavouras Temporárias | 47 |
| Lavouras Permanentes | 15 |
| Cidades, Lagos e Estradas | 20 |
| **Florestas Plantadas** | **6** |
| Subtotal | 707 |
| Outros | 38 |
| Áreas Inexploradas disponíveis para agricultura | 106 |
| **Total** | **851** |

Fonte: IBGE, CNA e Conab

# Challenges and Opportunities

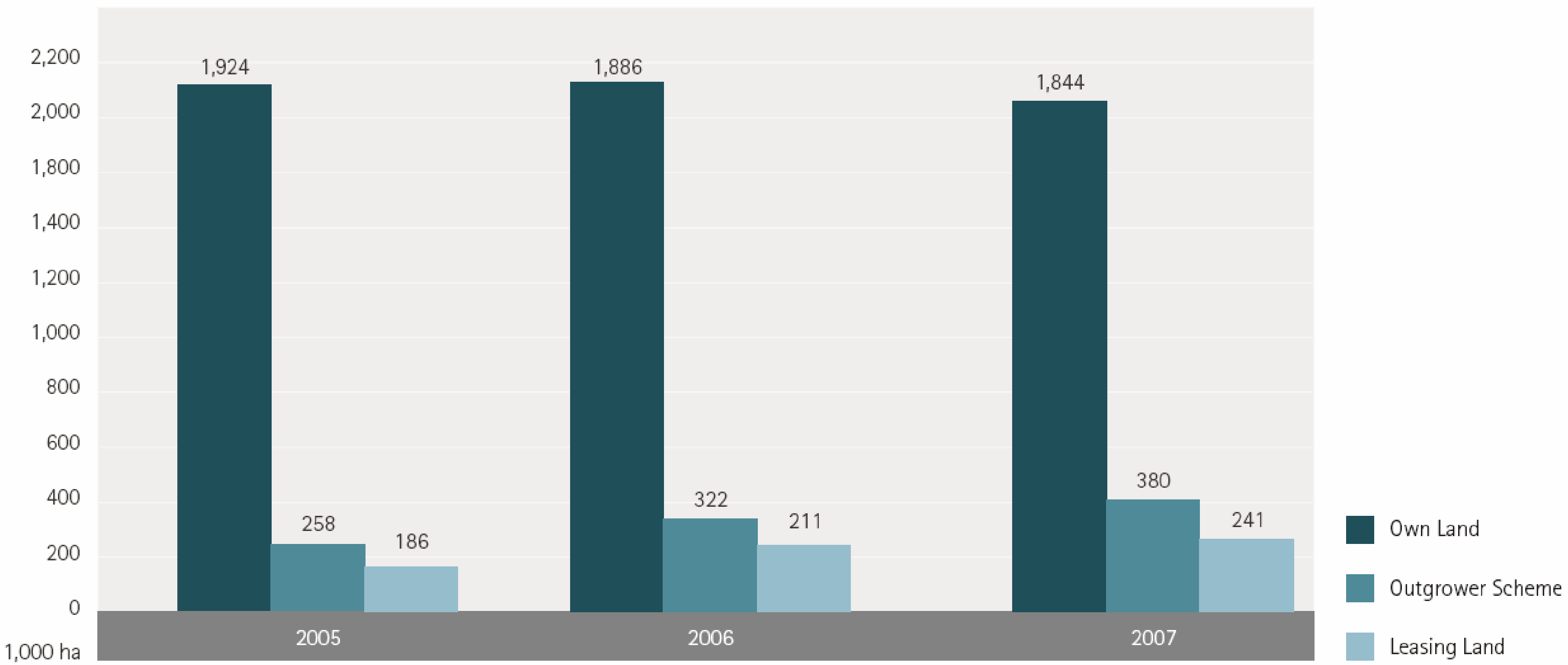
- Land occupation and conflicts
- Forest farmer credit access and incentives
- Wood supply regularity and confidence
- R&D for native and other species
- Biodiversity and natural resource conservation

# Land Occupation and Conflicts

**OPPORTUNITIES:**

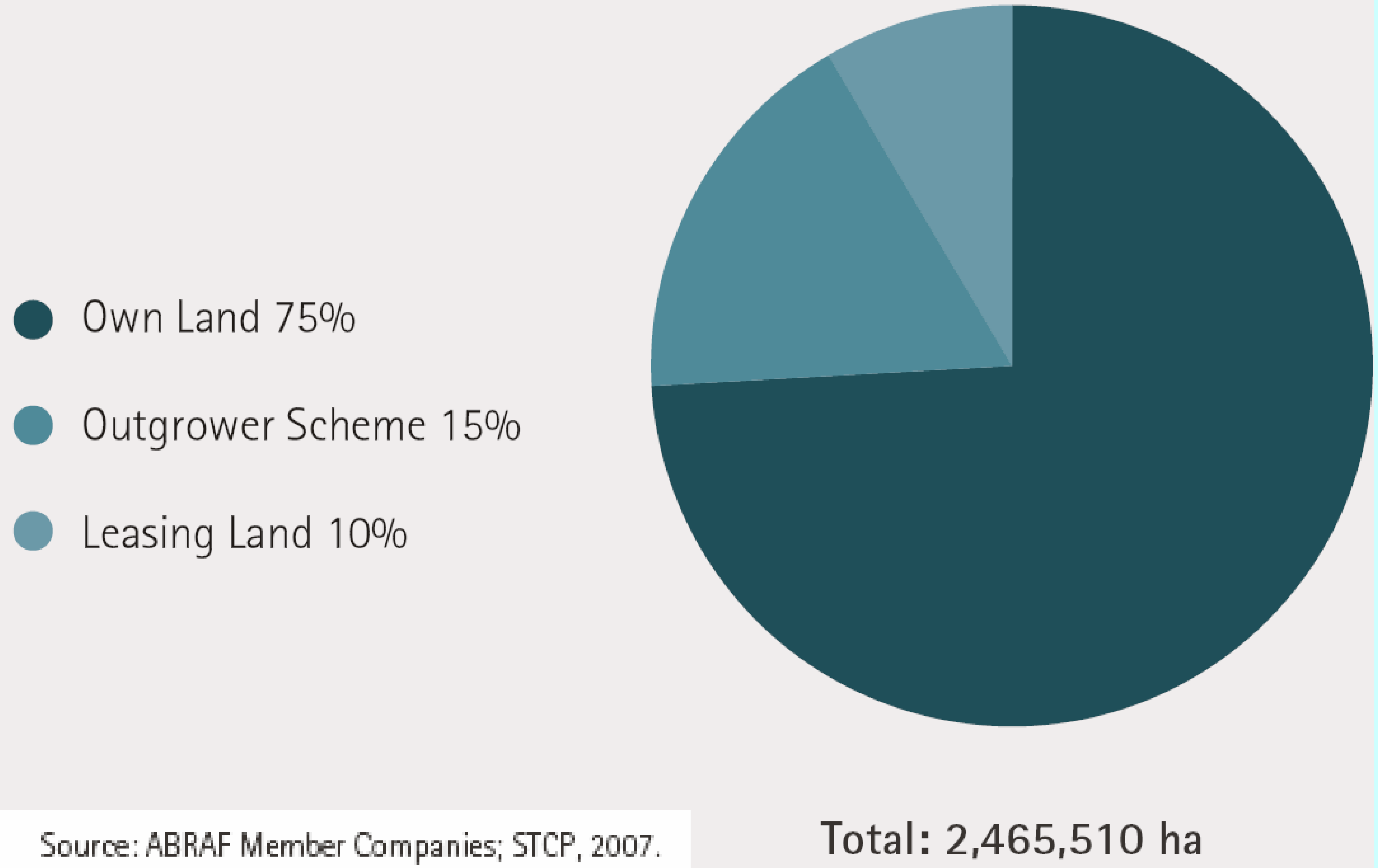
- Improve the Outgrower Schemes
- Promote timber multiple use – “create a forest culture”
- Promote local job and business opportunities
- Economic-ecologic Zoning
- **THE FOREST “SOCIAL” DIALOGUE ?**

Figure 1.04 Distribution of Pine and Eucalyptus Planted Forest Areas of ABRAF Member Companies by Property Type (2005-2007)




Source: ABRAF Member Companies; STCP, 2007.

Figure 1.05 Distribution of Forest Plantation Areas of ABRAF Member Companies by Property Type in 2007




Source: ABRAF Member Companies; STCP, 2007.

# Forest Farmer Credit Access and Incentives

OPPORTUNITIES:

- Purchase contracts as collaterals
- Land tenure
- Improve credit access for forestry
- Incentives for forestry

# Wood supply regularity and confidence

OPPORTUNITIES:

- Create a timber’s futures market in Brazil
- Diversify the forest grower’s profile
- Promote native species plantation and sustainable forest management

# R&D for native and other species

OPPORTUNITIES:

- Improve investments in native species research aiming at production
- Enforcement against illegal logging
- Consumers information campaigns

# Biodiversity and natural resource conservation

**OPPORTUNITIES:**

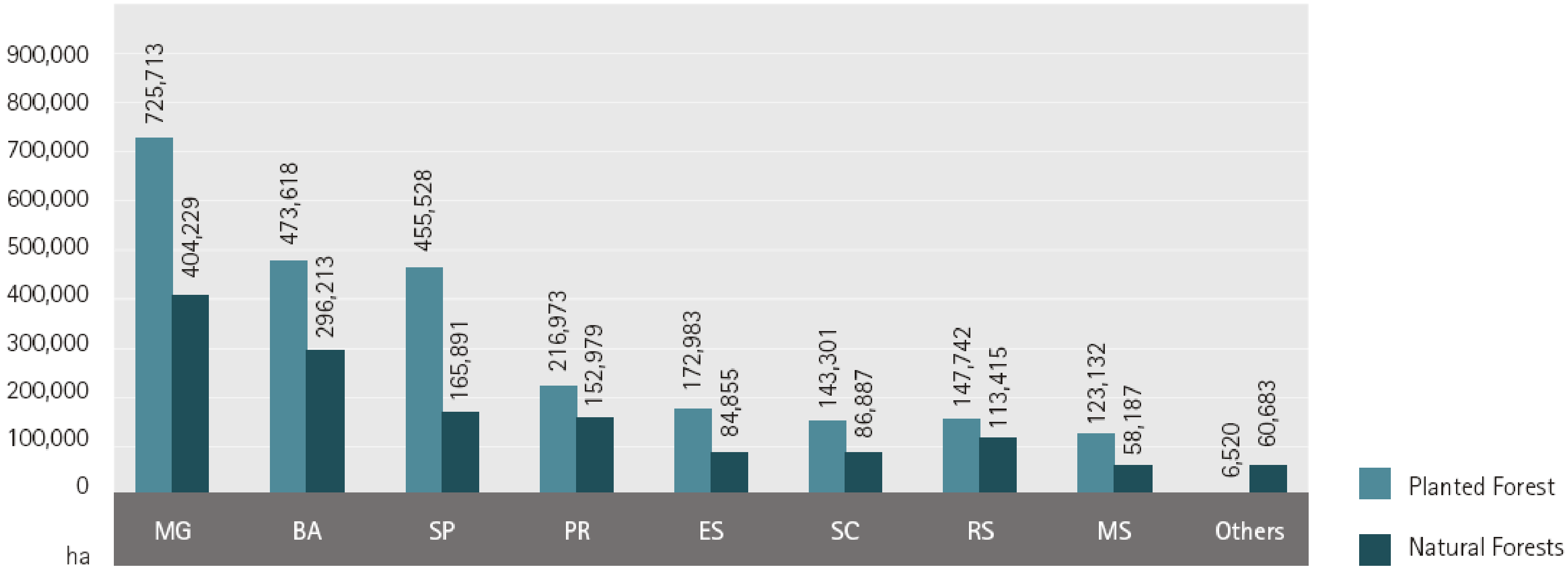
- Landscape planning
- Partnerships with NGOs and research groups
- Private reserves establishment
- Incorporate conservation requirements in outgrower contracts
- Native forest substitution (charcoal, firewood)
- **ATLANTIC FOREST DIALOGUE**

The Forests Dialogue

Diálogo Florestal para a Mata Atlântica

Uma iniciativa regional do "The Forests Dialogue"

Figure 1.07 Protected Natural and Planted Forest Areas by ABRAF Member Companies by State (2007)




Source: ABRAF Member Companies; STCP, 2007.

# THANK YOU

# OBRIGADO

André Guimarães
Instituto BioAtlântica