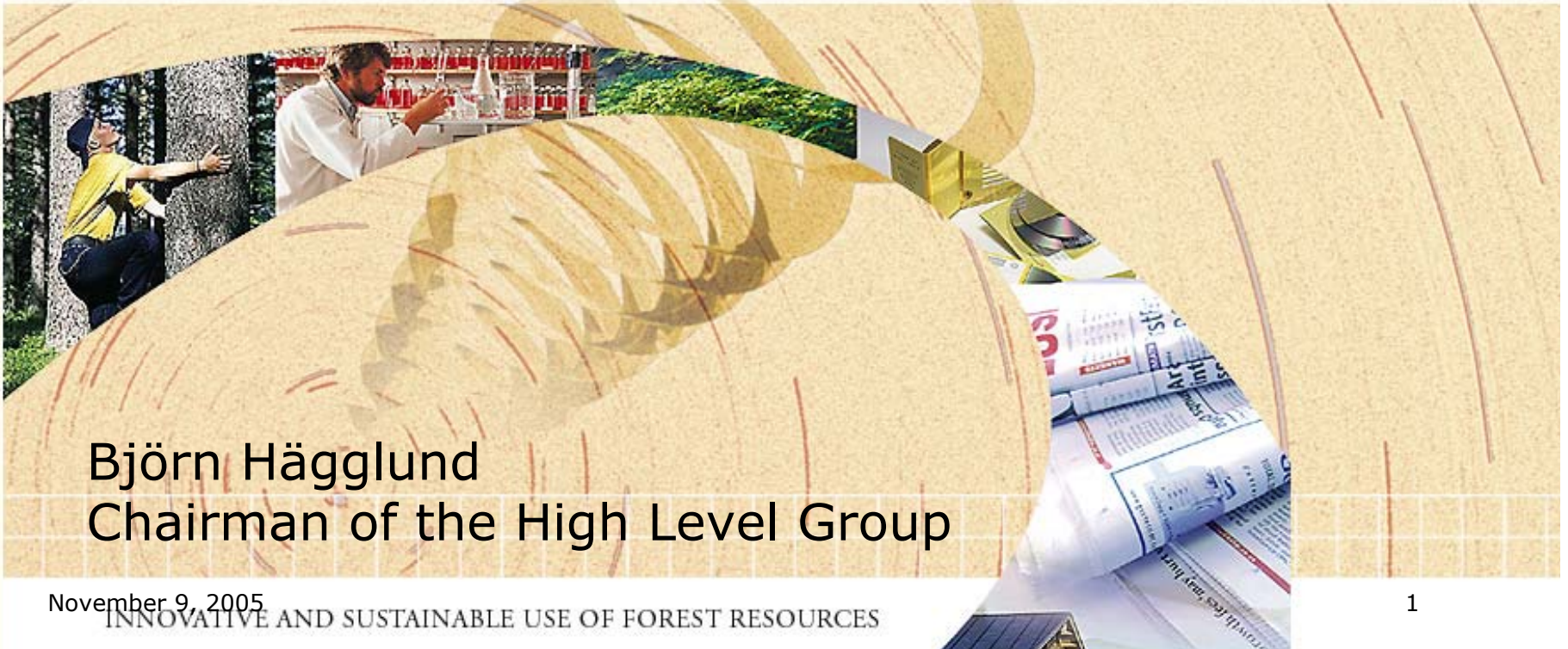




# The opportunities offered by the FTP



Björn Hägglund  
Chairman of the High Level Group

November 9, 2005

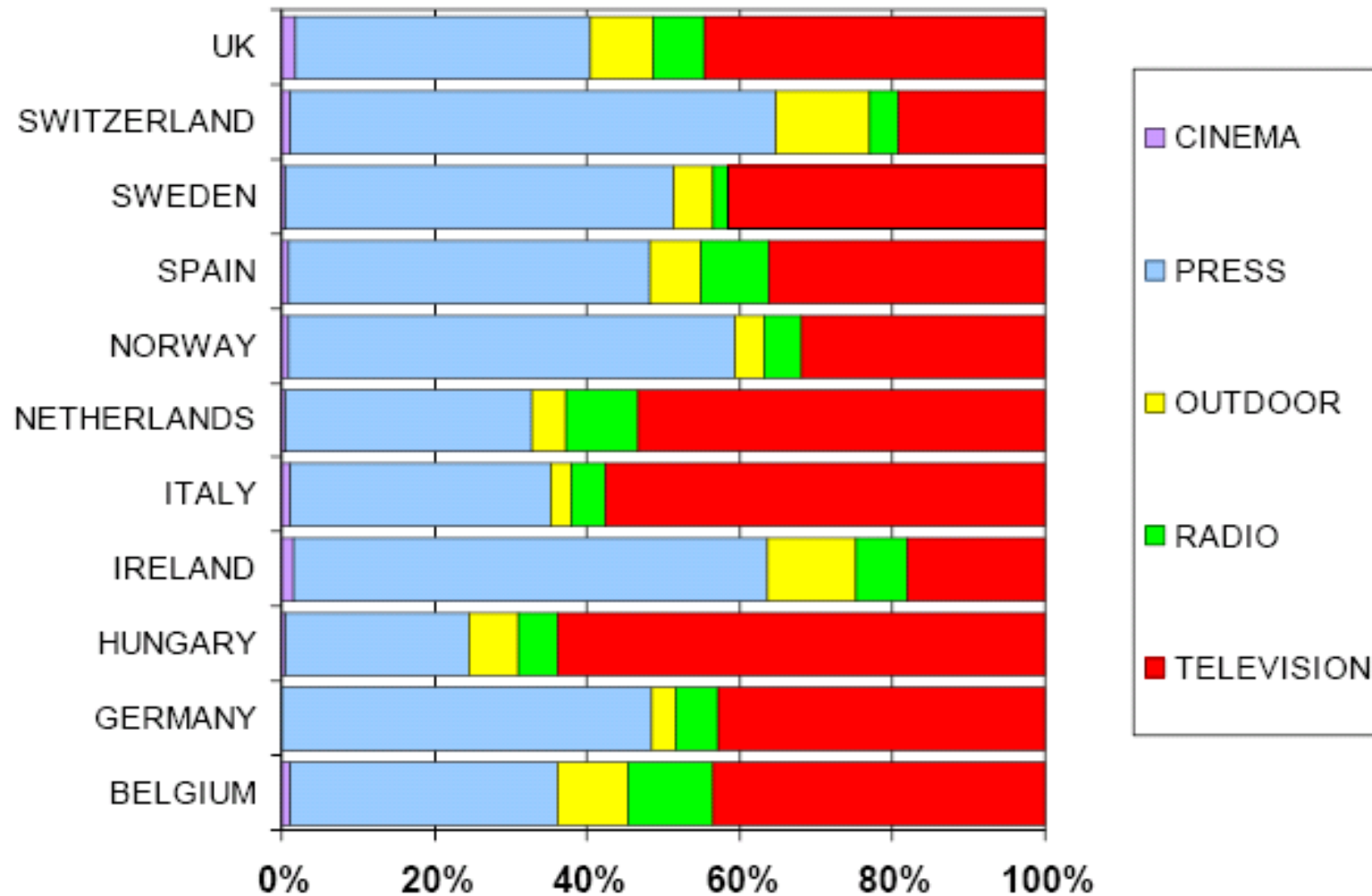
INNOVATIVE AND SUSTAINABLE USE OF FOREST RESOURCES

# Role and contribution of the forest-based sector in Europe

Today's European forest-based sector:

- › Is an important sector, delivering 8 % of EU manufacturing added value (550-600 bill. EUR)
- › Comprises a renewable and continuously expanding forest resource covering one third of Europe's land area.
- › Incorporates some 16 million forest owners and provides near 4 million jobs in industry, to a large extent in rural areas and in SMEs.
- › Enjoys global technological leadership and occupies a leading research position at international level.

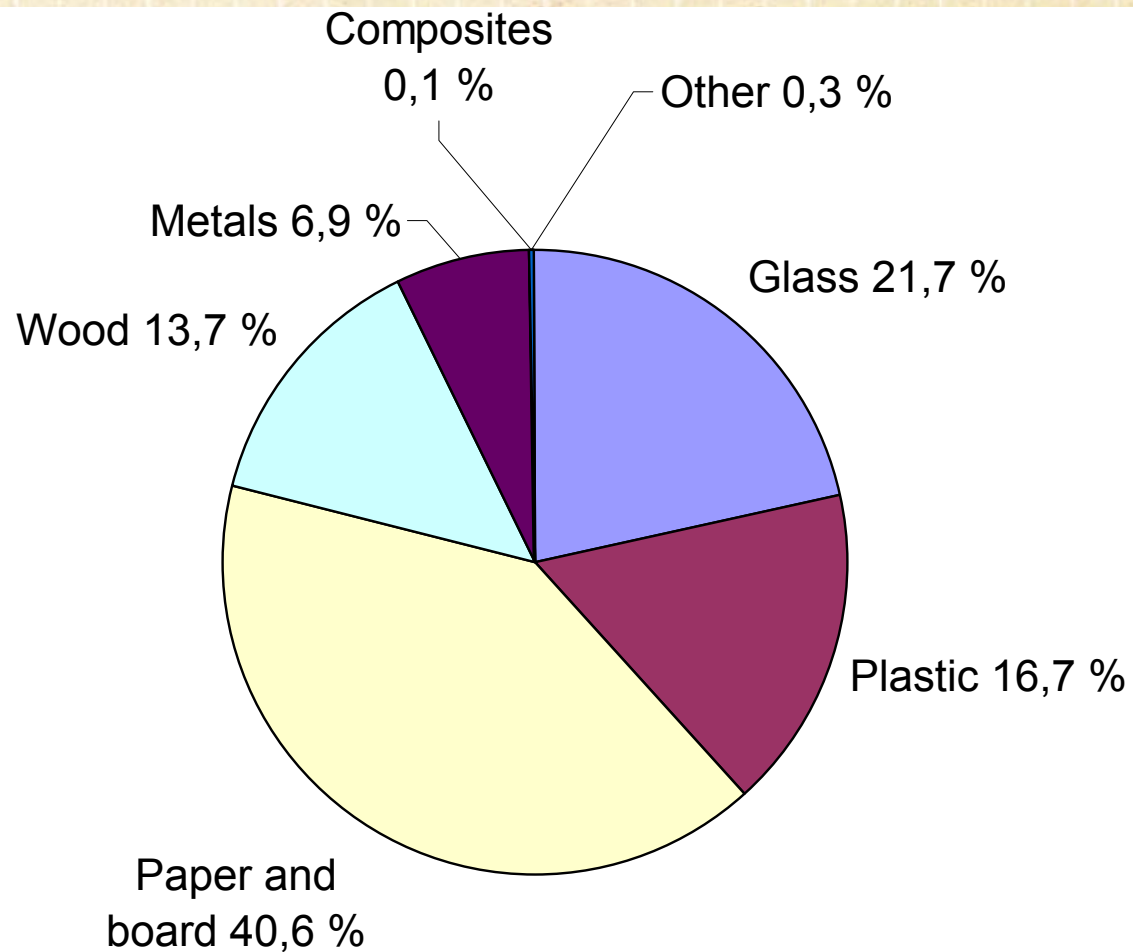
# Media in Europe



Source: Nielsen Media Research

November 9,  
2005

# Origin of packaging materials in Europe

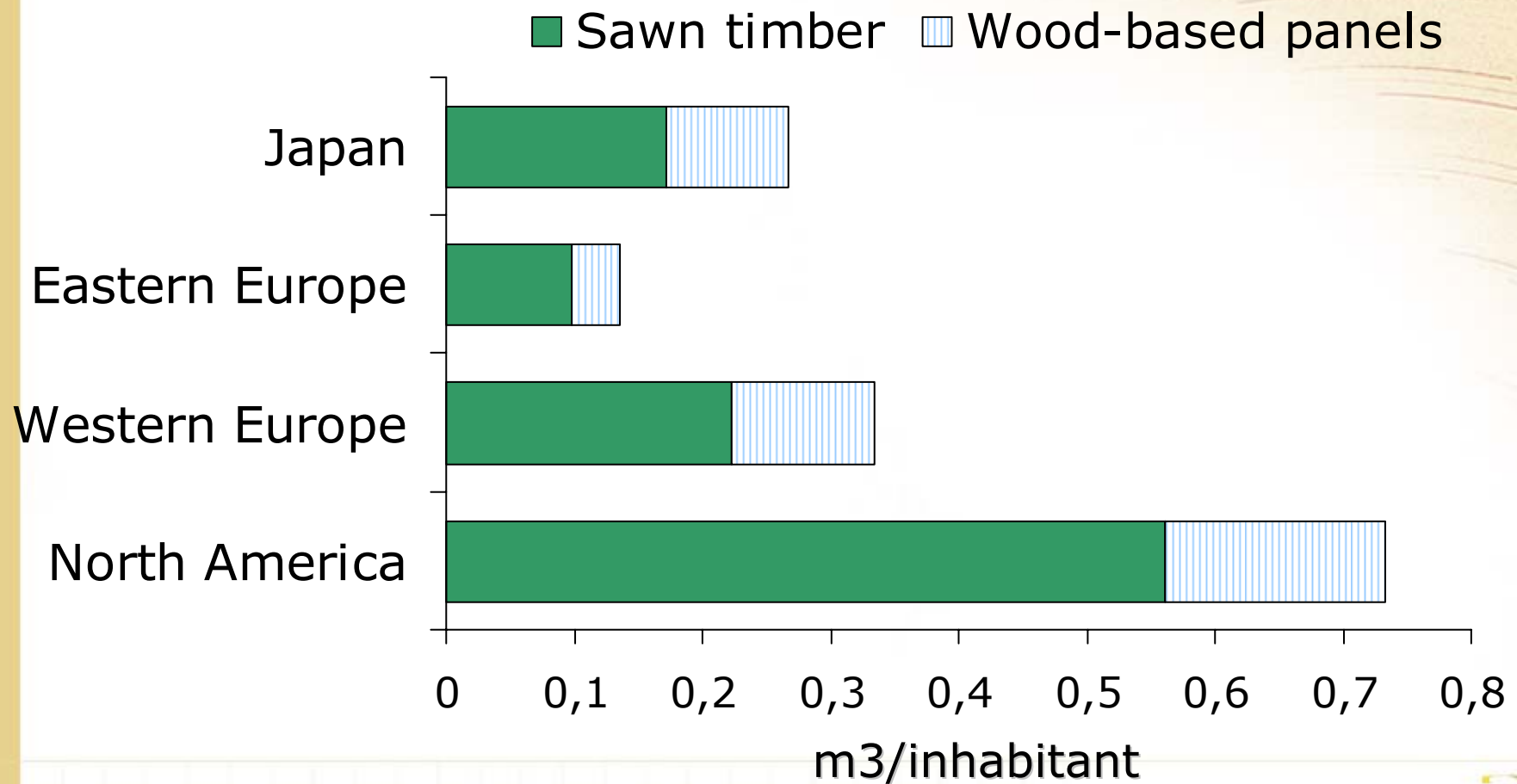


Source: European Commission statistics 2003

November 9,  
2005



## The consumption of wood products in different areas



# Threat: Cheap raw materials

## Europe



## Brasil



**Competitiveness is important!**

# Veracel ten years ago



# Veracel Today



# Threat: Cheap labour

## Europe

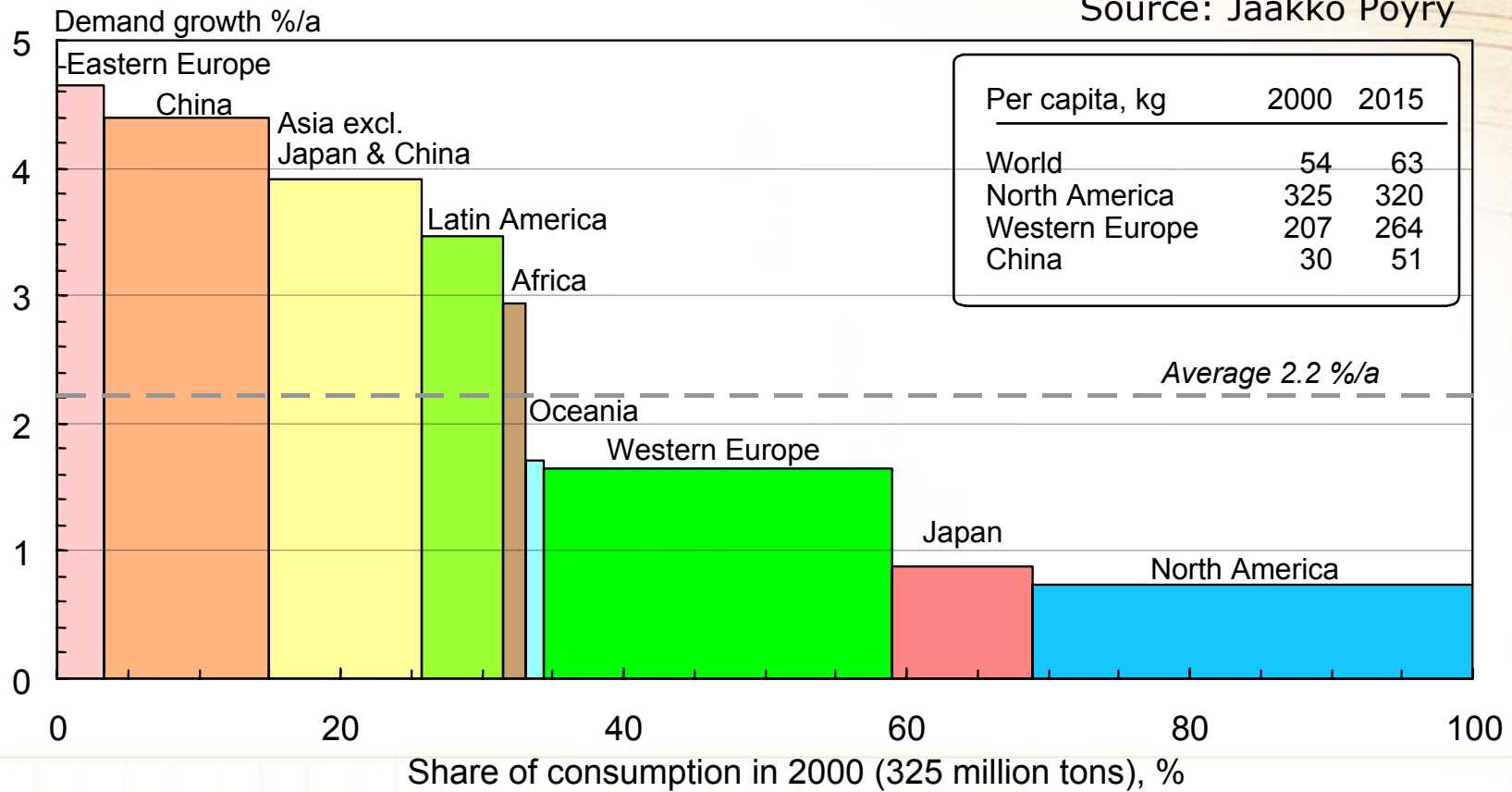


## China



# Demand Growth for Paper and Paperboard 2000-2015

Source: Jaakko Pöyry

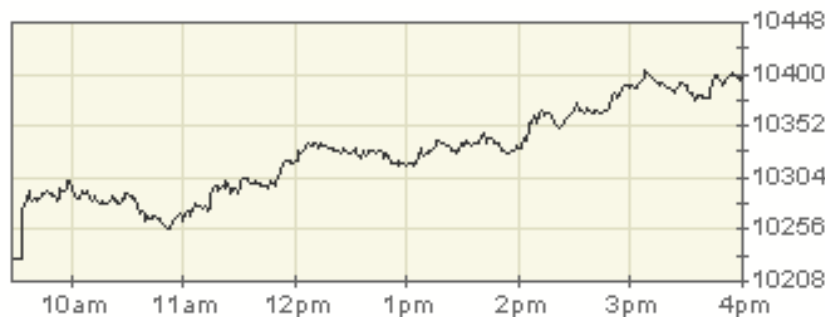


# Threat: Highly leveraged new actors



## MADISON DEARBORN PARTNERS

Stock Price in Dollars



## The way forward

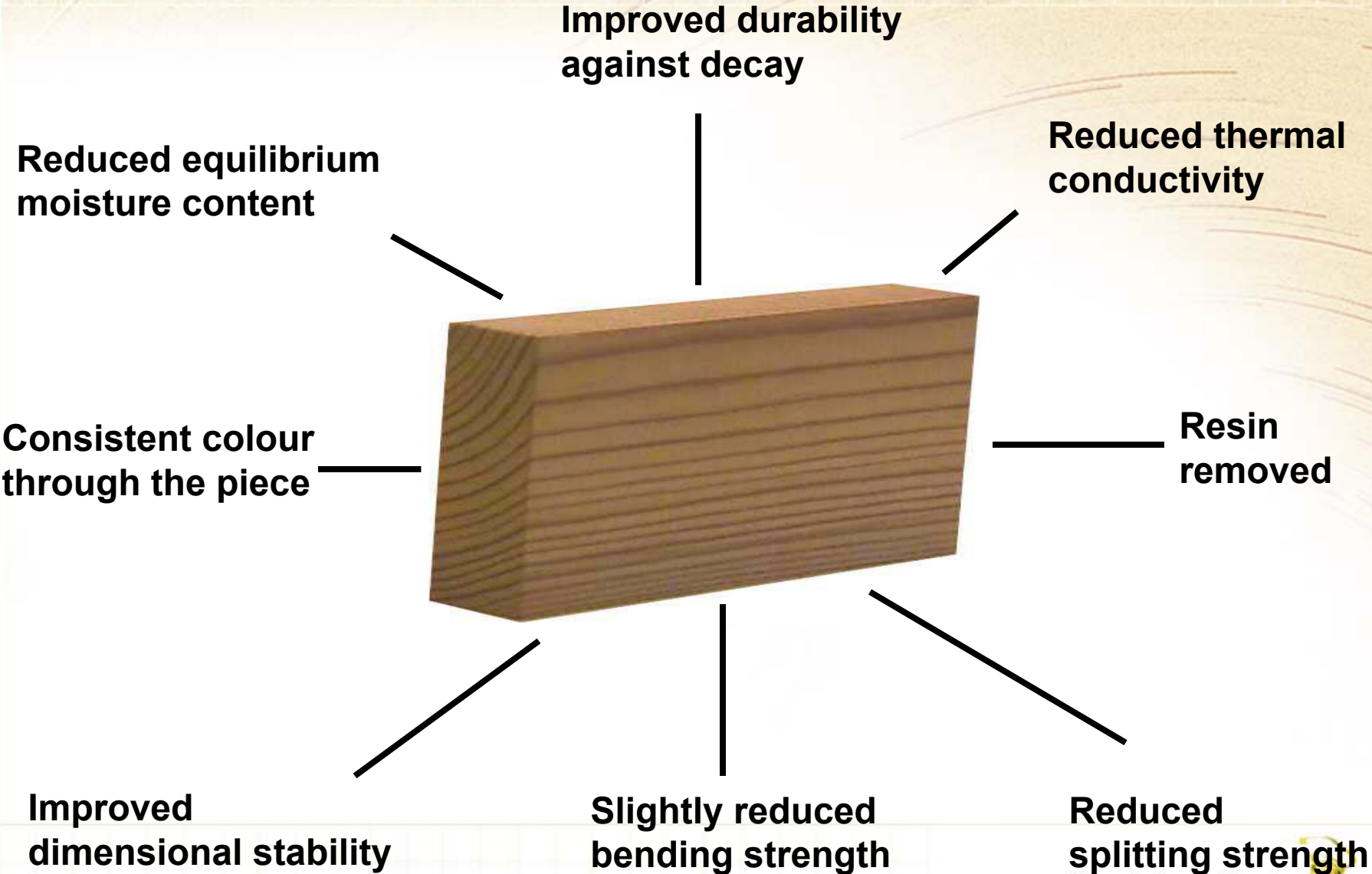
Europe is a global leader today. To meet future challenges the European forest-based sector has to:

- ◉ Continue to improve products and processes based on existing technologies
- ◉ Introduce higher value-added products and services partly based on new technologies and other emerging opportunities.

# Intelligent forest-based products – applications: Intelligent packaging



# ThermoWood® - properties



# Sterilising the food in a paper package

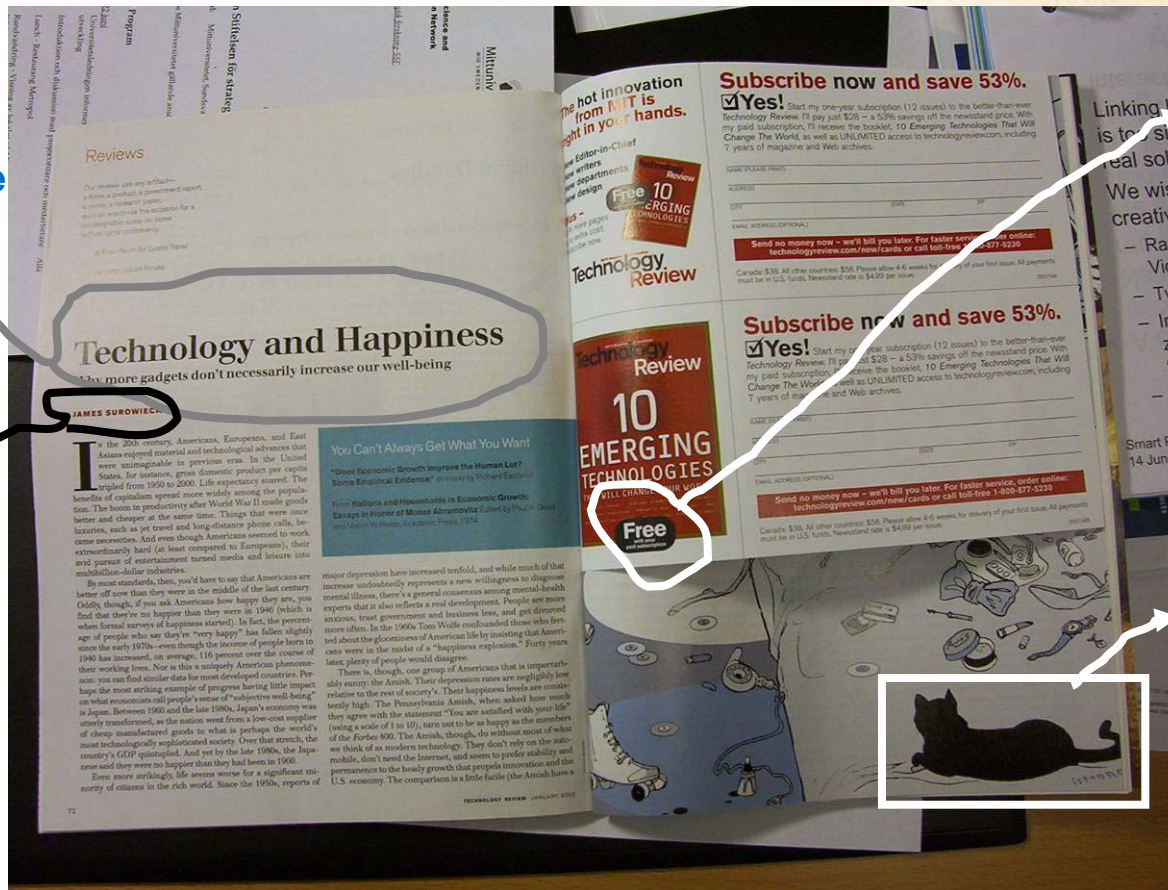


Retorting = In-container sterilisation

# Paper is hyper-linked and speaks digital !

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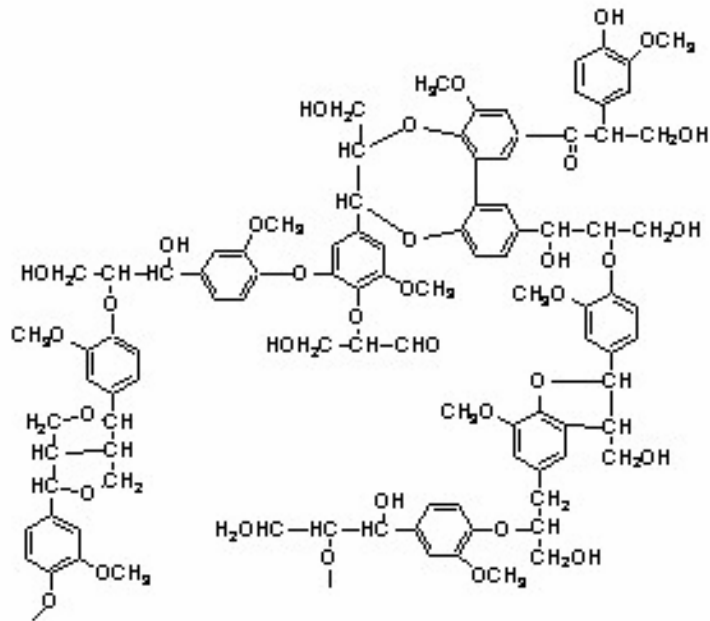
Contact this author



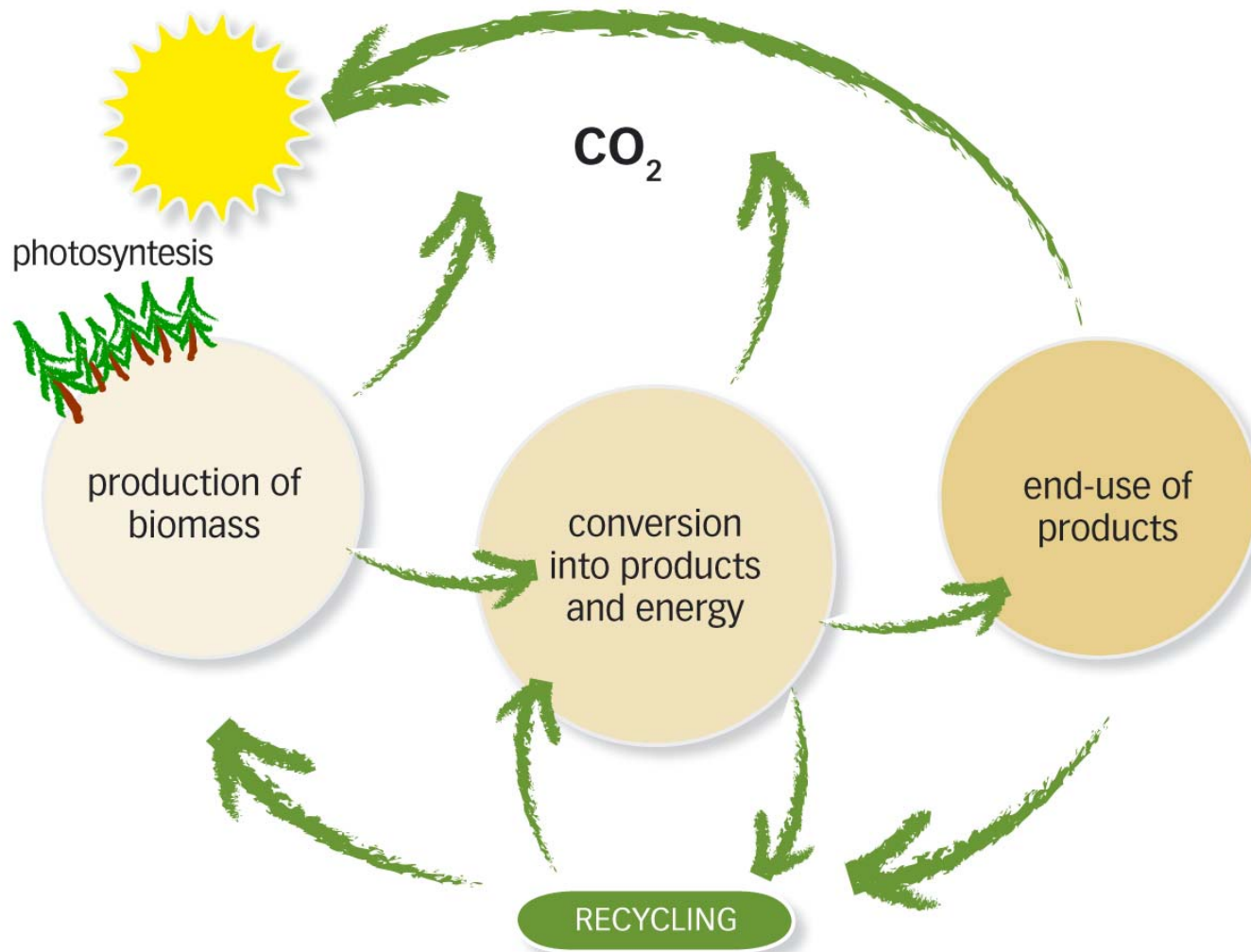
OK, I will try this free version to see.

Cut and paste in my clip art file.

# Gene technology



# Climate change



## Developing the sector

- ◉ Strengthening competitiveness.
- ◉ Strengthening position as the global technology leader.
- ◉ Mitigating climate change, improving water quality, retaining biodiversity.
- ◉ Fulfilling many social needs in a modern society
- ◉ Creating a more efficient research structures.



## Vision for 2030

- The European forest-based sector plays a key role in a sustainable society
- It comprises a competitive, knowledge-based industry that fosters the extended use of renewable forest resources
- It contributes significantly to a bio-based, customer-driven and globally competitive European economy

## FTP's activities towards the vision

- › The Strategic Research Agenda (SRA) sets out research priorities of the sector for the medium to long-term
- › Mobilizing the private and public investments for the implementation of the SRA.
- › Promoting structural measures in order to increase the efficiency of the carry-through of the SRA
- › Identifying challenges and actions related to education and training to secure high-skilled work force to the sector.
- › Raising public awareness and enhancing dialogue with the stakeholders.