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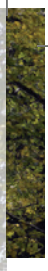


Private Forest Property in France

KEY FIGURES 2015

Forêt Privée Française

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Foreword

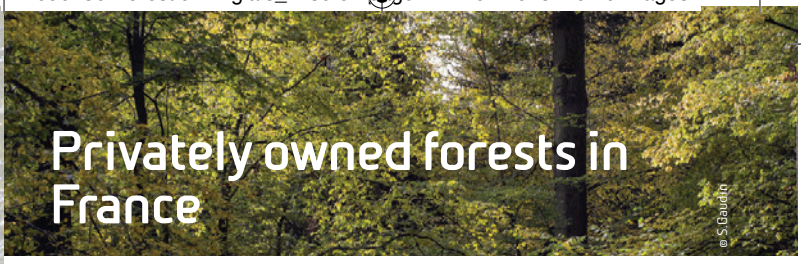
French forests have become a highly topical issue in recent years. As the first link in a supply chain with a promising future, forests, and privately-owned forests especially, are attracting attention for their potential to satisfy industrial demand for wood products, but also to conquer new markets.

These are encouraging prospects for private foresters, but the challenge is considerable given the current economic context.
What is the area covered? How much wood is produced, and how much is harvested? How many people own forests? What important developments have they seen in recent years?

This brochure compiles the main facts and figures about private forests in France. We hope these will help our readers to understand and appreciate the work undertaken by all the men and women whose efforts today, at every level, are shaping the future of our forests. We owe them our thanks: it is their activities that are enriching, extending and diversifying France's private forests to drive a sector that employs 440 000 people and generates some 60 billion € in turnover. Private forests alone absorb 9% of all CO_2 emissions in France. Thanks to their forest management, woodland owners help to maintain natural water filtering at several thousand abstraction points across the country, preserve woodland biodiversity and maintain landscapes for the benefit of us all. We should take pride in these achievements, as we continue to work together to rise to the challenges of the future and strive to care still better for our forests and their three inseparable functions: economic, environmental and social.

Antoine d'Amécourt
Chairman, *Forestiers Privés de France and Centre national de la propriété forestière* (CNPF)

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Privately owned forests in France

A natural resource where abundance goes hand in hand with sustainable management

One third of France is forested

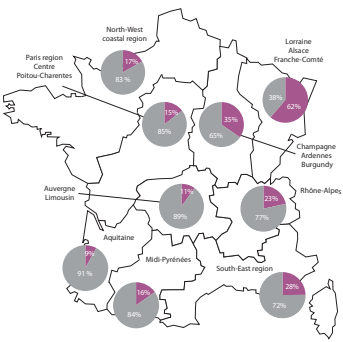
Forests in France cover 16.5 million hectares*, or 30% of its entire territory. After 50 years of expansion, forest cover has stabilised in recent years.
**including 15.7 million hectares managed for timber production.*

...and three quarters of its forests are privately owned.

Covering 12.2 million hectares, privately owned forests make up 74% of all wooded areas in France, including 11.8 million hectares managed for timber production.

Location	Area (x 100 ha)	
	Public forests	Private forests
Coastal regions in NW France	270	1 310
Greater Paris region, Centre and Poitou-Charentes	245	1 385
Champagne-Ardennes and Burgundy	594	1 098
Alsace-Lorraine and Franche-Comté	1 193	718
Auvergne and Limousin	136	1 154
Rhône-Alpes	362	1 246
Aquitaine	164	1 649
Midi-Pyrénées	203	1 095
South-East	800	2 107
Total	**3 967**	**11 762**

Total area of private forests and distribution by ownership and region



Source 1

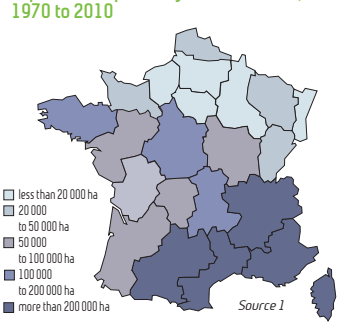
Public forests *are owned by the State or by local authorities subject to forestry regulations. They are managed by the National Forests Office (ONF).*
Private forests *are owned by private individuals or groups.*

Privately owned forests cover 23% of mainland France

Private forests cover 40% or more of the total area in nine départements: Corrèze, Alpes Maritimes, Dordogne, Gironde, Lot, Ardèche, Var, Southern Corsica and the Landes.

The area covered by private forests increased by 25% from 1970 to 2010. The main reason for this expansion was the abandon of farming and livestock grazing around the Mediterranean.

Expansion of privately owned forests, 1970 to 2010



Source 1

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Broadleaved forests are in the majority

French forests are highly diverse, with 136 different tree species identified.

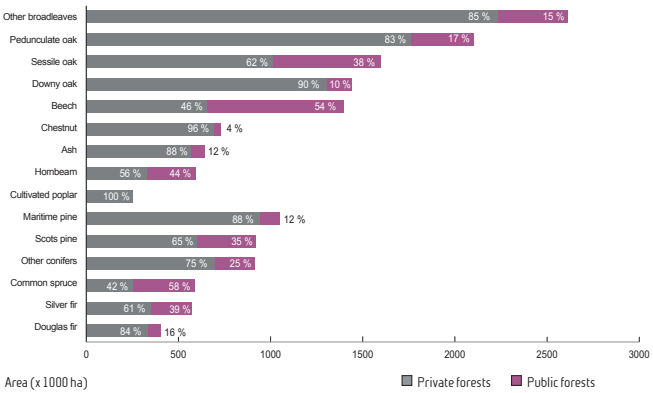
Forests producing broadleaved timber in France cover 11.2 million hectares, or 71.2% of all forests.

Oaks are the dominant species in private forests, with a total of more than 5 million hectares.

Chestnuts and poplars tend to be specific to private forests.

Conifers in French forests cover just over 4.4 million hectares and include a wide variety of species: maritime pine, Scots pine, firs and spruce.

Areas covered by the main species, by type of ownership



Source 1

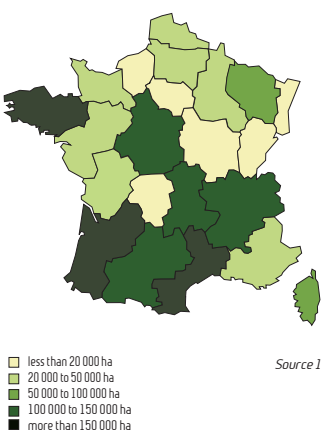
...and their area is expanding

Since 1970, in private forests, broadleaved stands have expanded by 1.4 million hectares, and mixed forests by 0.3 million hectares, while conifers have declined by 0.3 million hectares as a result of the 1999 and 2009 storms.

The trend is particularly marked in Aquitaine*, Brittany and the Languedoc-Roussillon.

* *Areas to be replanted due to storm damage are classified as broadleaved forests (woody regrowth prior to conifer planting).*

Expansion of privately owned broadleaved forests, 1970 to 2010

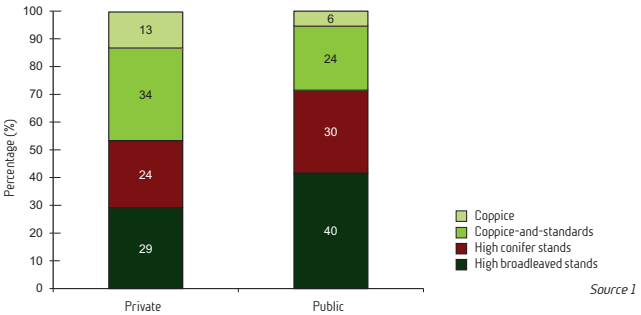


Source 1

A range of management options

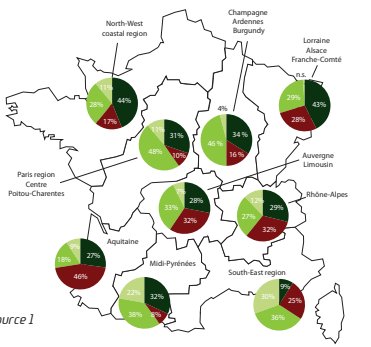
Management objectives and methods vary widely in private forests. High forest stands are in the majority (53%), as a result of management giving priority to timber production.

Structure of private and public forests



Source 1

Structure of private forests across the 9 main French regions



Source 1

High conifer stands are in the majority in the mountain areas of southern France (Vosges, Massif Central, Alps, Pyrenees) and in Aquitaine.

Coppicing is least common in the North-East of France.

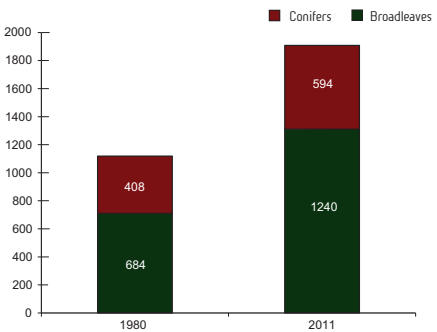
n.s: non-significant, i.e., the statistical data are not precise enough for publication.

Europe's third largest stock of standing timber

French forests contain some 2.6 billion m³ of standing timber. In terms of standing timber volumes, broadleaved species make up 68% of private forests and conifers 32%.

Since 1980, standing timber in private forests has increased by 68% in volume, from 742 million m³ to 1.8 billion m³.
Standing broadleaved timber has increased by 556 million m³ (+81%) and standing conifer timber by 186 million m³ (+46%).

Standing timber volumes in private forests (in million m³), 1980 and 2011.



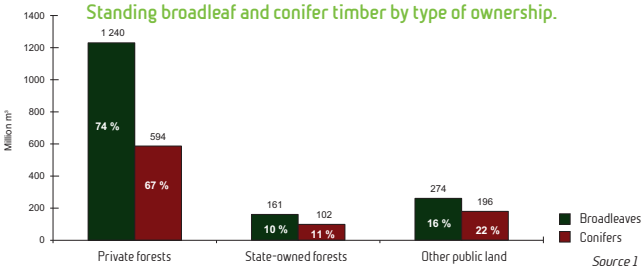
Source 1

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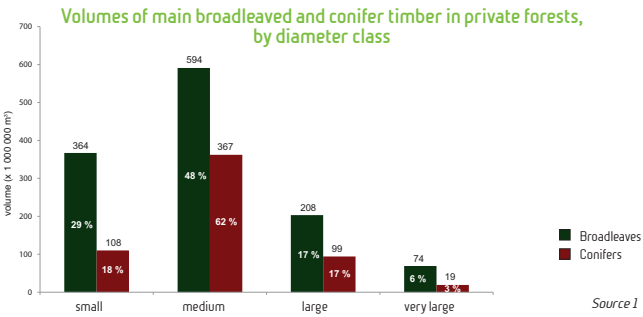
Europe's largest stock of standing broadeaved timber

Significant volumes of standing timber



Source 1

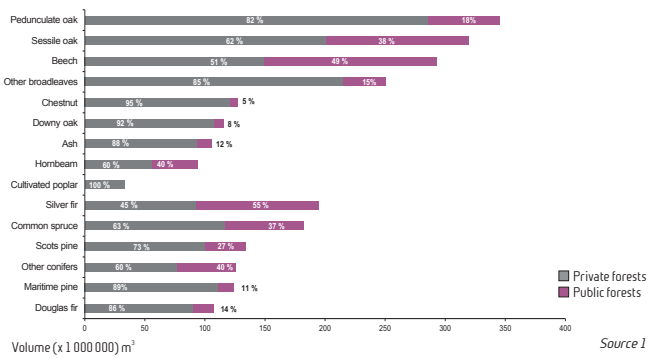
74% of standing broadleaf timber is privately owned
67% of standing conifer timber is privately owned



Source 1

Oaks are the dominant broadleaved species

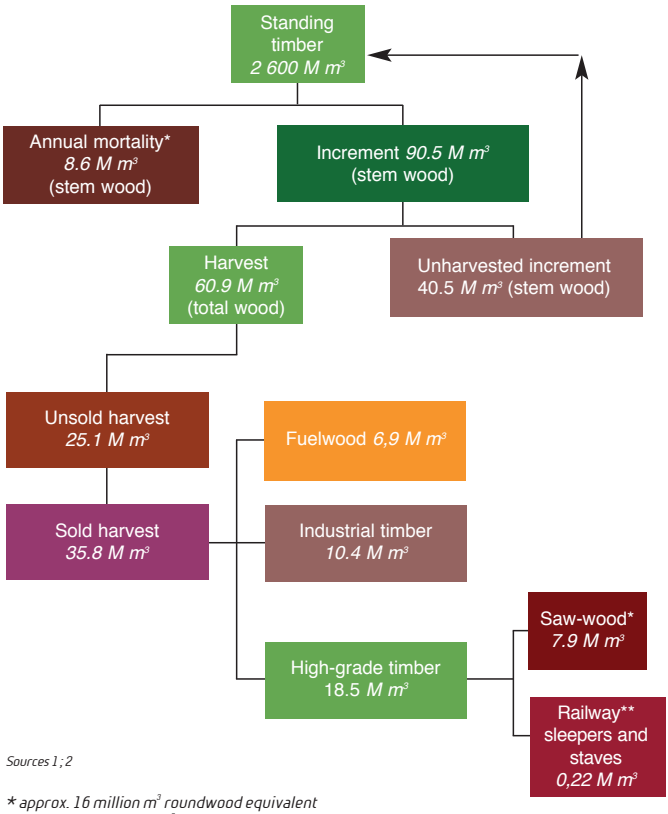
Oaks account for 47% of all standing broadleaved timber in private forests. The pedunculate oak is the most common tree species in French forests, accounting for 351 million m³ of standing timber, of which 82% is in private forests.



Source 1



Very substantial resources



Sources 1 ; 2

** approx. 16 million m³ roundwood equivalent*
*** approx. 0.3 million m³ roundwood equivalent*

High-grade timber: wood of sufficient quality and diameter to be used for solid wood products or veneer after sawing, planking or peeling.

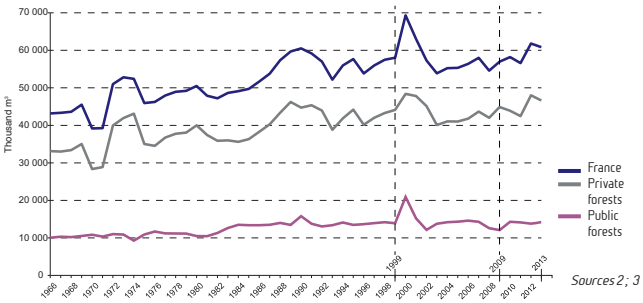
Industrial (low-grade) timber: wood unsuitable for sawing, planking or peeling and used for industrial purposes such as small-diameter roundwood (posts) or pulped for paper or chipboard manufacture.

Fuelwood: wood for combustion in different forms: logs, sawdust, woodchips and pellets

Harvests are increasing in private forests

In 2013, 77% of the timber harvest was from privately owned forests.

Timber harvest (including for own consumption)



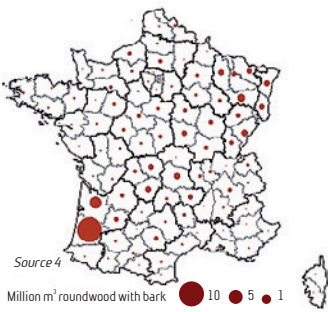
Sources 2 ; 3

Timber harvests have increased by 41% in the last fifty years. 60.9 million m³ were harvested in 2013, including 25.1 million m³ not put on the market. Of the 2.6 billion m³ of standing timber stocks, 2.3% were harvested in 2013.

In 2013, 35.8 million m³ of timber were harvested and sold, 10% less than in 2010 and dropping back to around the 2008 figure, which is the average for recent years.

The Landes, Gironde and Vosges *départements* alone supply a third of the total harvest.

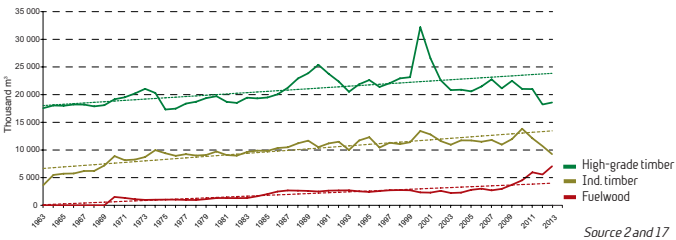
Timber harvest sold in 2010 in mainland France



Source 4

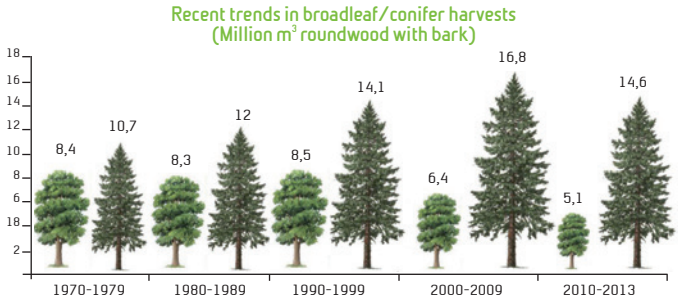
Harvested volumes are sold as high-grade timber, industrial timber and fuelwood

After increasing overall since the 1960s, harvests of high-grade and industrial timber dropped by about 6 million m³ from 2007 to 2013. However, fuelwood sales increased sharply over the same period, by about 4 million m³, to more than 6.9 million m³.
In France, fuelwood accounts for 47% of renewable energy resources



Source 2 and 17

Broadleaf timber harvests at a record low

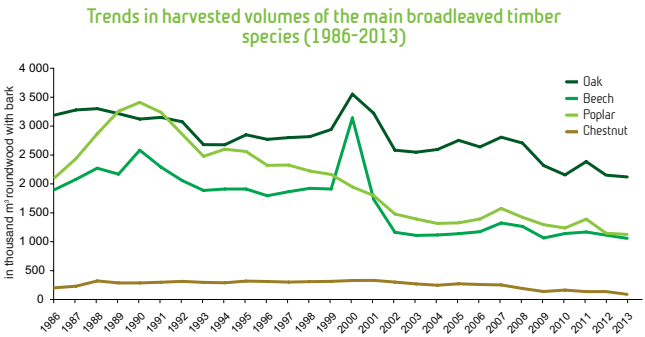


Source 2

Conifer harvests have increased rapidly since the 1970s (+37 % from areas replanted with National Forestry Fund grants and now coming into production), and especially since the 1999 storm, while the broad-leaved harvest has dropped by 40 %, although these resources are more abundant.

However, the volume of conifers has now dropped for the third consecutive year, as the harvest of windthrow from the Klaus storm comes to an end.

All broadleaved species are affected



Source 2

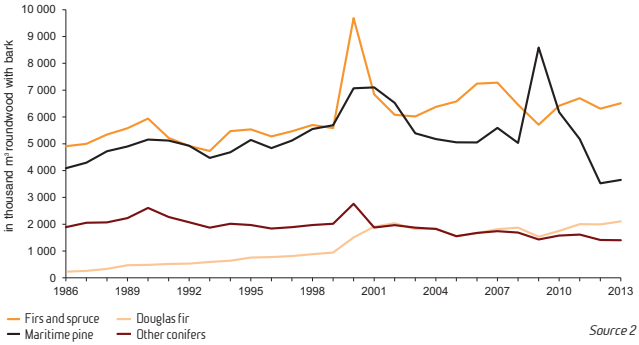
Harvests of broadleaved timber species are declining. The main reasons are the decline of conventional outlets (e.g. solid wood furniture) that are not being replaced, the closure of small sawmills, increasing production costs and lower prices. Strong international competition with the arrival of new players (e.g. from Eastern Europe and South-East Asia) is accelerating the decline.

Oak is the main species harvested for high-grade timber.

The drop in poplar harvests is due to factory closures, but also to exceptional but temporary over-exploitation of poplar stands in the early 1990s. Although harvests have stabilised in the last 10 years, there has been a substantial decline in poplar plantings over the same period, which points to a risk of scarcity in the period from 2020 to 2030.

Conifers are predominant in the high-grade timber harvest

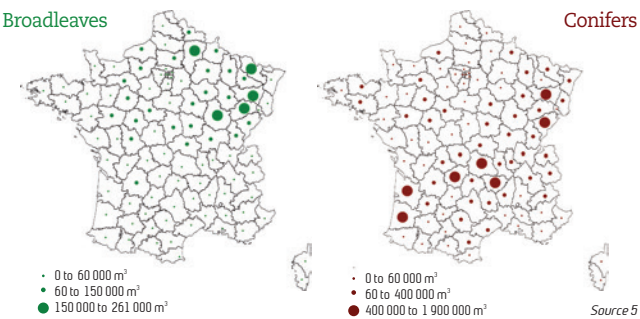
Harvests of high-grade timber from the main conifer species, 1986-2013



Source 2

In terms of species harvested for high-grade timber, conifers are in the majority, accounting for over half of the volumes sold.
Firs, spruce and maritime pine are in the lead by far, although the maritime pine market is going into steep decline as the windthrow harvest comes to an end. The Douglas fir harvest has remained stable after levelling off with the 1999 storm.

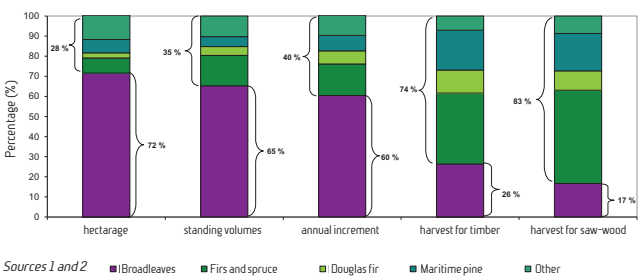
The 2012 high-grade timber harvest by *département* in mainland France



Source 5

In 2013 in France, 28 % of conifer stands supplied 74 % of all high-grade timber and 83 % of saw-wood, while 72 % of broadleaved stands supplied only 26 % of high-grade timber and 17 % of saw-wood.

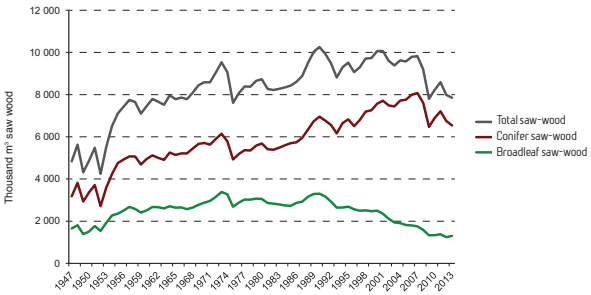
Broadleaved and conifer species by area occupied, standing timber volume and harvests of high-grade timber and saw-wood (2013)



Sources 1 and 2

Trends in saw-wood production

Saw-wood production, 1947-2013



Source 2

Total saw-wood volumes remained fairly stable from 1999 at around 10 million m³, but in 2008 and 2009, with the economic downturn, they dropped sharply, back to 1964 levels, wiping out the growth observed in the 1990s, while standing timber volumes increased.

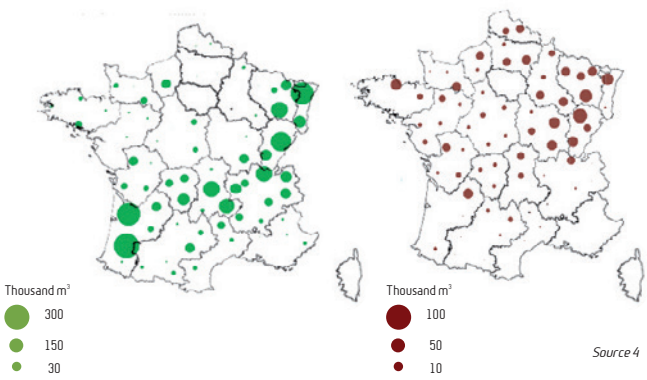
Sawmill production reached just over 8 million m³ in 2013, a 4% drop compared to 2010.

Production of conifer saw-wood (2010)

France :
6 894 000 m³ in 2010 and 6 544 000 m³ in 2013

Production of broadleaf saw-wood (2010)

France :
1 336 000 m³ in 2010 and 1 305 000 m³ in 2013



Source 4

Conifer saw-wood production rose to over 8 million m³ in 2007, but dropped back to 1980s levels in 2009, at 6.5 million m³.
Production again fell sharply in 2013 compared to 2010.

Conifers, for which market demand is much higher than for broadleaf timber, account for 83 % of commercial sawn timber produced in France.

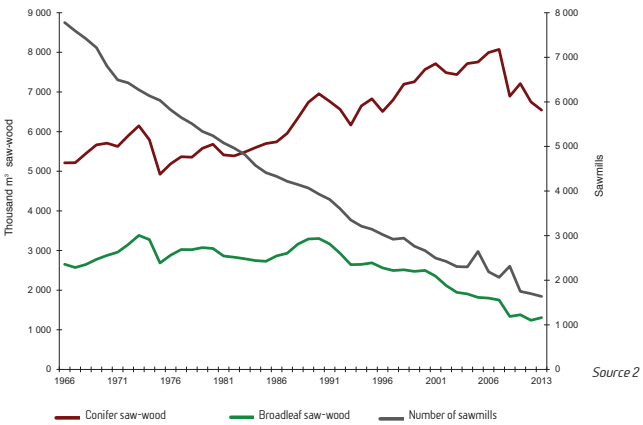
Broadleaf saw-wood production is declining steadily, dropping from 2 million m³ in 2003 to 1.3 million m³ in 2013, which is lower than the figure for 1947.

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Increasing concentration of softwood sawmills

In 2013, 1 636 sawmills were operating in France. These figures represent a drop of about 79 % since 1966. Although 46% of sawmills produce only 3% of sawn timber, they can generate value from locally sourced timber for small-scale industries, especially if these y modernise their equipment (for drying and planing).

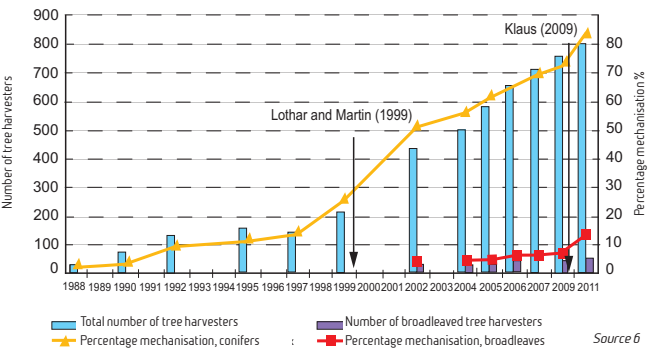
Trends in saw-wood production and number of sawmills, 1966-2006



Source 2

Mechanisation is essential to develop the forestry sector

Mechanised tree felling in France in percentage, 1988-2011

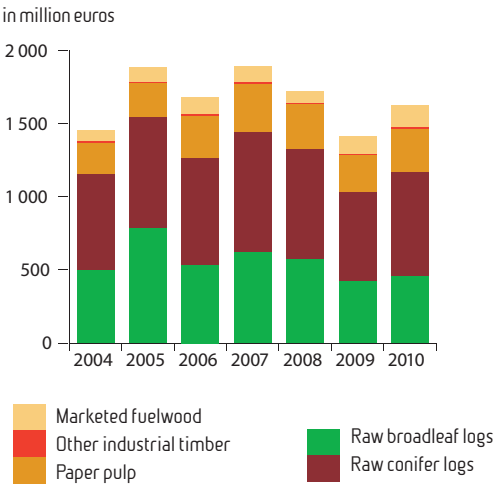


Source 6

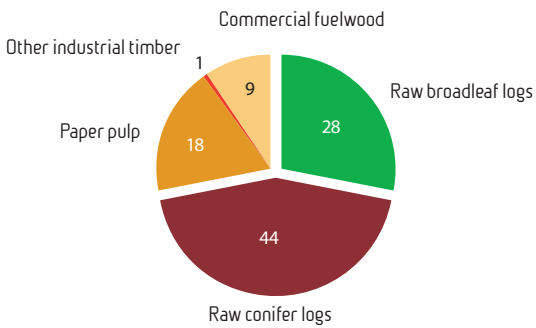
Mechanisation surged with the need to clear windthrown timber in the wake of the 1999 storm. The trend has continued with new developments in machinery and logistics, which have increased productivity, improved working conditions for foresters and helped to keep labour costs down. Mechanisation demands precautions to limit its impacts on forest soils and trees.

High-grade timber: 72% of the harvest in value

Sales figures for wood harvests, 2004-2010



Sales percentages by timber category



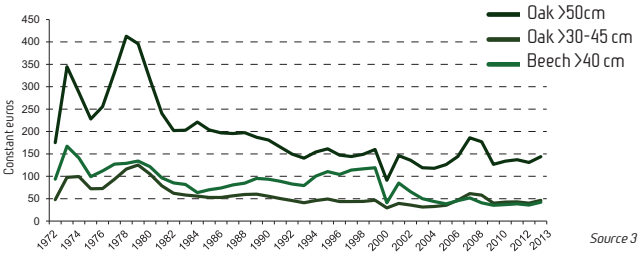
Source 4

In 2010, total sales of wood amounted to 1.6 billion euros, broken down as follows:

- 72 %, or 1 169 million euros, for high-grade timber (including 289 million euros for oak, 357 million euros for fir and spruce and 189 million euros for maritime pine).
- 19 %, or 302 million euros, for industrial timber.
- 9 %, or 151 million euros, for commercial fuelwood.

Broadleaf timber prices are falling in France

Average prices for oak and beech, in constant 2013 euros,
on the ONF autumn market

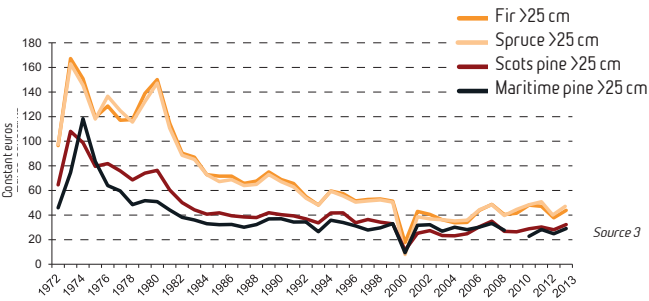


Source 3

Since 1973, prices for raw broadleaf logs have steadily dropped in constant euros, especially for oak more than 50 cm in diameter, where the price has halved.

Softwood prices are also falling

Average prices for conifer timber (25 cm and over) in constant 2013 euros,
on the ONF autumn market



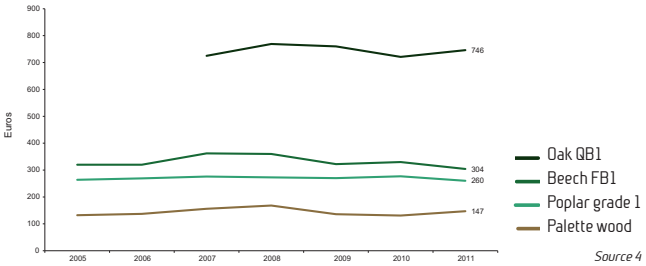
Source 3

Since 1973, prices for raw conifer logs have dropped sharply, by 74% for fir, 71% for spruce, 70% for Scots pine and 61% for maritime pine.

Saw-wood prices

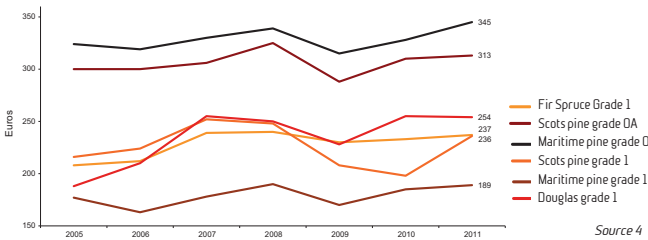
Prices for saw-wood vary with species and categories. They vary more widely between broadleaf species than between conifer species.
From 2005 to 2010, the economic downturn affected all product categories. Prices for broadleaf, fir and spruce timber were more stable than for pines or Douglas fir, which were also affected by the Klaus storm in 2009.

Broadleaf saw-wood prices (2005-2011)



Source 4

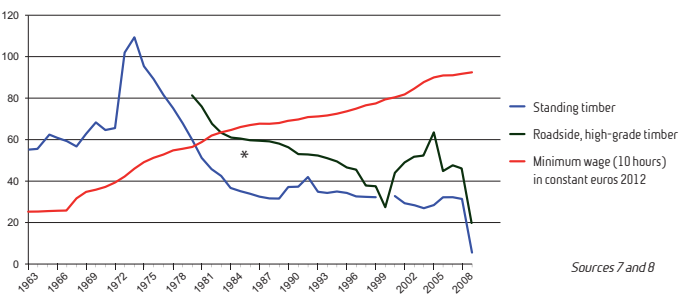
Conifer saw-wood prices (2005-2011)



Source 4

Falling timber prices, rising labour costs

Prices for maritime pine from private forests, standing and roadside, and minimum wage (10 hours) in constant euros 2012

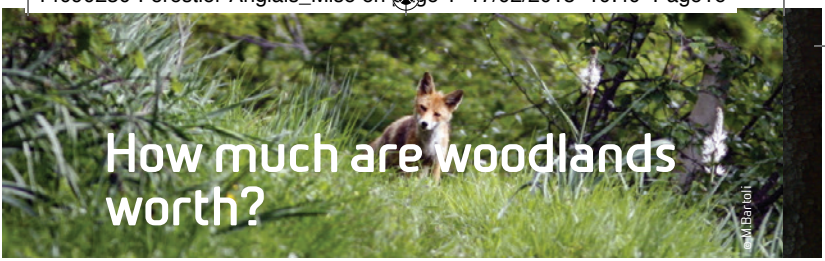


Sources 7 and 8

** Roadside timber prices, 1985-1990: estimated trends, due to partial responses from several regions and absence of classification*
Standing timber : 2000 : no data

Because labour costs are rising in constant euros while timber prices are falling, wages for forestry workers financed by timber sales have dropped sharply in real terms.
In 1960, 1 m^3 of timber paid for 3 hours of forestry work; in 2009, 9 m^3 paid for just 1 hour. This equates to a factor of 18 in 50 years, which cannot be lowered even by increased productivity.

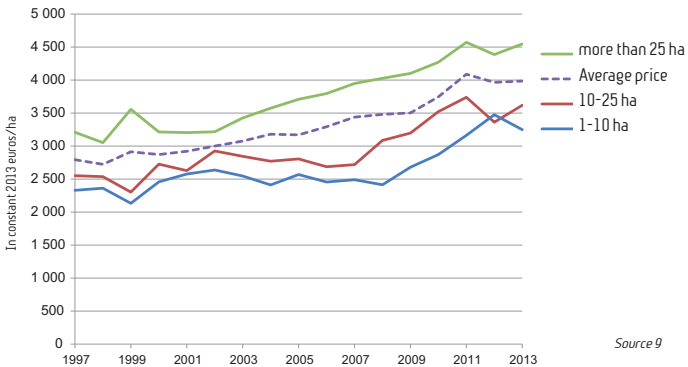
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How much are woodlands worth?

Prices for woodlands are rising steadily

Prices for woodlands according to area, 1997 - 2013



Source 9

> 1997 to 2005: The value of woodlands increased with the overall upturn in the real estate market, but transactions and prices only picked up moderately due to the impact of the 1999 storm.
> 2005 to 2009: Timber and forest prices picked up and the size of woodlands bought and sold increased.
> 2009 to 2013: Average prices for woodlands rose by 19% from 2009 to 2011, then dropped by 1.5% in 2012, stabilising in 2013 to the 2011 level.

Woodlands do not frequently change hands

In 2013, 106 500 hectares of woodland were sold for a total of 954 million euros, a drop of 9.6% compared to 2012 and 22.3% compared to 2011.
The number of transactions rose for the fourth consecutive year, with 14 690 transactions in 2013, a rise of 1.8% over 2012 and 4% over 2011.

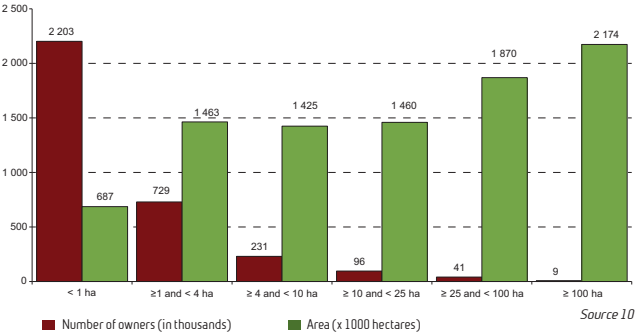


Who owns forests?

According to the French land registry, about 380 000 forest owners own more than 76% of all private forests.

ha

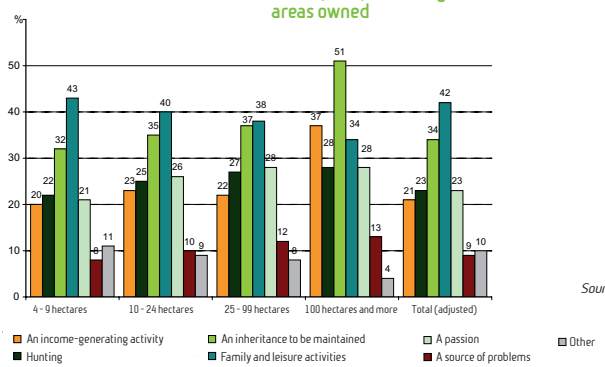
Number of forest owners and total forest area by area class



Source 10

Forests are primarily seen as a family inheritance and a family activity

Owners' interests in their forests, in %, according to the woodland areas owned



Source 11

21% of forest owners see woodland management as a economic activity that can periodically generate income. Timber is felled in 75% of private forests of more than 4 ha, although only 34% of owners say they take a particular interest in their heritage value whether or not they generate any income. To 42%, their woodlands are most important for family and leisure activities. 23% use them as hunting grounds, 23% see them as a passion and only 9% as a source of problems.

NB: These results vary with size classes.

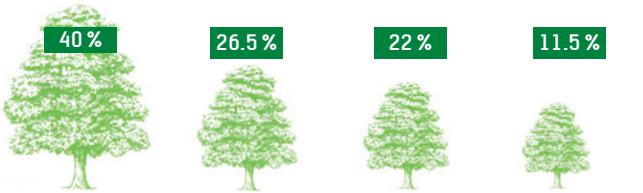
What do forest owners do with their wood?

Private forest owners harvest more than 40 million m³ of wood each year, to sell or to use themselves.

In 2012, they sold about 22.6 million m³ of wood, or 63 % of the total timber harvest. The majority was sold directly by the forest owners.

Who sells wood?

Timber volumes, including felled timber, sold to professionals in the timber sector, by type of intermediary



9 million m³ directly sold by owners	6 million m³ sold by an intermediary other than a cooperative or registered forester	5 million m³ sold through cooperatives	2,6 million m³ sold through registered foresters

Source 12

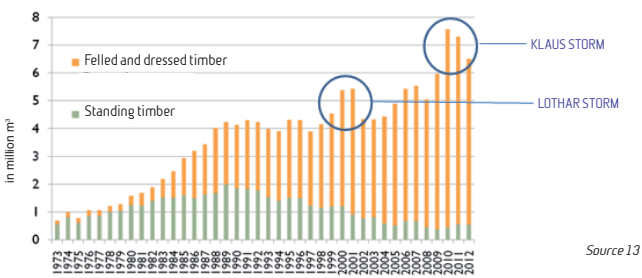
NB: These results from the 2012 survey on the structure of private forest ownership are estimations made by forest owners and may therefore differ from the figures supplied by the intermediaries concerned.

How is the wood sold?

The 2012 survey on the structure of private forests in France shows that of the total wood volume sold by owners of more than 1 ha of woodland, 7.1 million m³ were sold as felled wood.

38% of the volumes reported as sold by an intermediary were sold by cooperatives.

Example of trends in timber extraction as reported by cooperatives, 1973-2012



Source 13

The total timber volume sold rose dramatically in 2000-2001 and 2010-2011 in the aftermath of the Lothar and Klaus storms.

The 2012 figure, therefore, does not reflect a decline but an increase over 2009, which was a year of "normal" production.

How do owners manage their woodlands?

> 40% with no outside input: 40% of woodland owners handle their sylvicultural and forestry operations themselves and 21% use unpaid family help.

> Only 3% pay for the services of freelance forestry experts, 5% are members of a forestry cooperative or group.

> 13% seek advice or information: 13% of woodland owners read technical forestry magazines, 6% use the free advisory services of the CRPF, 5% often attend information meetings and 7% belong to a union.

> With the help of training courses offered by members of the professional forestry network (FOGEFOR).

FOGEFOR training courses

21 970 woodland owners in France have attended a total of 1026 FOGEFOR* training courses since 1983.

> 52 courses took place in 2012:

- 258 one-day courses,
- 5172 trainee-days,
- 894 woodland owners trained** out of 975 registered
- 17 trainees per course.



© M. Mouas

* *Woodland management training.*

** *"Trained" = number present on average over the duration of the course*

Several different topics are addressed each year:

> Forest renewal techniques (broadleaves, conifers, false acacia, etc.).

> Habitats and biodiversity (stations, climate change, landscapes, woodland parks).

> Harvesting timber for the market (sales, fuelwood, safety, chainsaw work, etc.).

> Programming and administrative management (simplified management plans, management programmes, PEFC, mapping, new technologies, tax issues, etc.).

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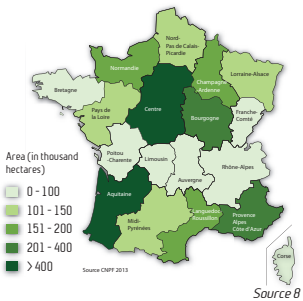
The simplified management plan: an effective forest development tool

Owners who apply a simplified management plan fell more timber and invest more in their woodlands, especially for timber production.
Forest owners are increasingly adopting sustainable management plans (simplified management plans*, code of good forestry practice*, standard management rules).

As of 31 December 2013, the owners of 35 148 forest properties of more than 25 ha (continuous or not), and covering 3.5 million hectares altogether, had adopted a simplified management plan or were required to do so.
The 4266 forest properties under a voluntary simplified management plan covered a total of 103 000 ha.

* *A simplified management plan is a document that describes the characteristics of tree populations and sets out felling plans and other management operations. Approval of the plan is a guarantee of sustainability.*

Areas covered by a simplified management plan, 2011



Source 8

In 2013,

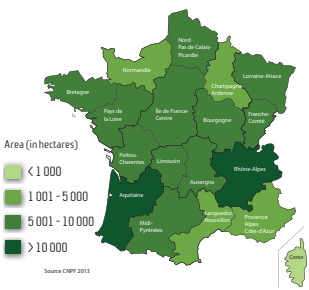
- 23 450 foresters managing a total of 240 736 ha of forests signed up to a code of good forestry practice (CGFP), an increase of 4 700 signatures.

Every French administrative region has at least one CGFP. 47% of all areas covered by a CGFP are in the Rhone-Alpes and Aquitaine regions.

- 1 906 foresters managing a total of 25 545 ha of forests have committed to applying standard forest management rules.

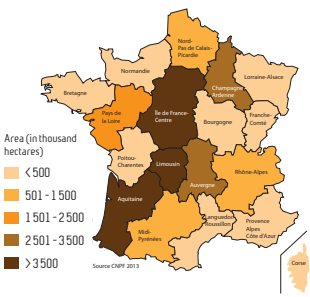
Forests managed under these rules cover 14 ha on average; those under a CGFP are smaller, at 10 ha on average.

Areas managed under a code of good forestry practice, 2011



Source 8

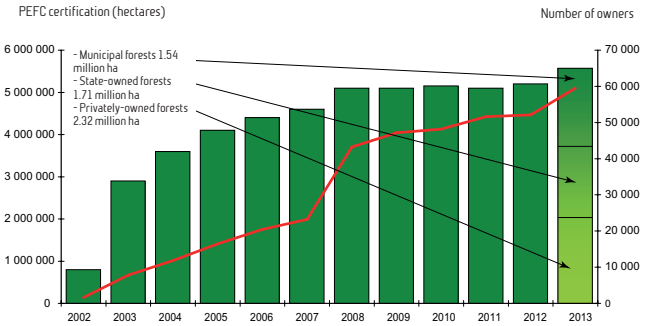
Areas under standard forest management rules, 2011



Source 8

Forest certification is gaining ground

Program for the Endorsement of Forest Certification Schemes



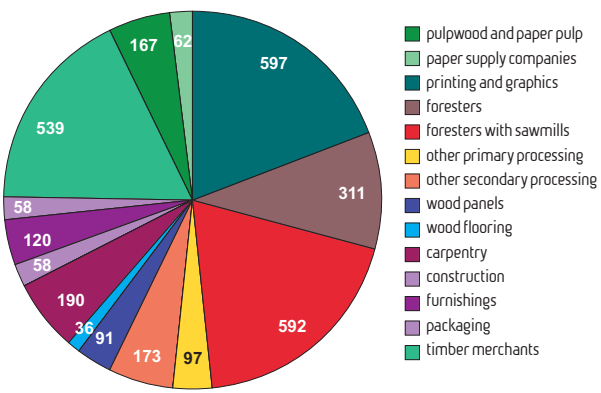
In mainland France, about 5.6 million hectares of forests, including 2.32 million ha under private ownership, are PEFC-certified for sustainable management.

In 2013, the number of PEFC-certified forest owners increased by 14% and the forest area covered by 7%.

In 2013 in France, 19 463 ha were certified by the FSC (Forest Stewardship Council).

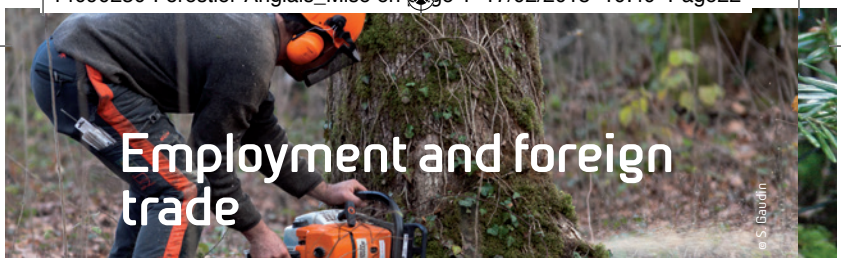
Sources 14 and 15

The 3081 PEFC-certified forest enterprises by type of activity, as of 31/12/13



Source 14

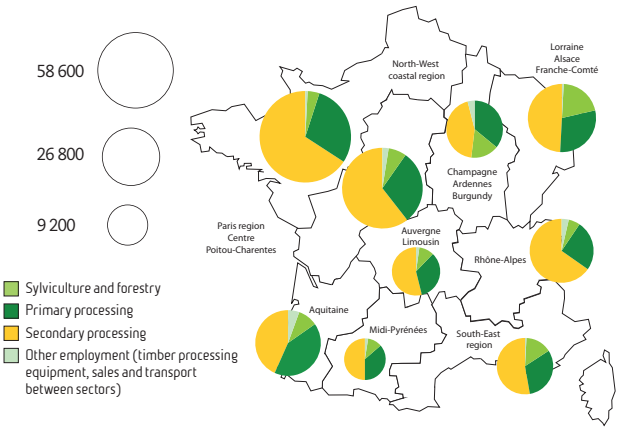
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Employment and foreign trade

The timber industry employs 440 000 people, including 220 000 in its core professions.

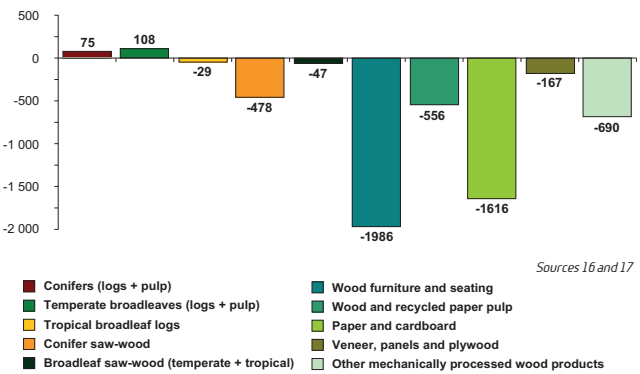
Employment in core enterprises of the forests and timber sector (December 2010)



Source 4

A balance of trade deficit in the timber sector, but potential for growth

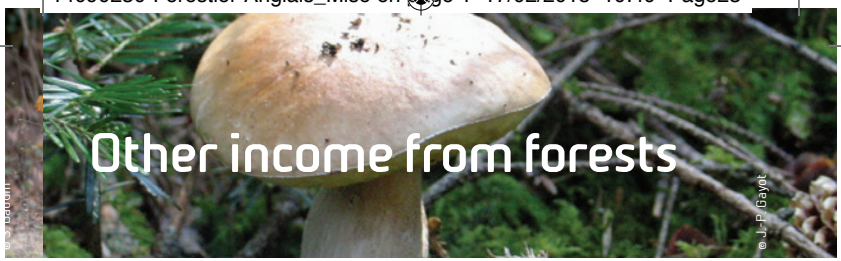
Foreign trade balance for timber and wood products in 2013 (in million euros)



Sources 16 and 17

France has the third largest area of production forests in Europe, but their potential is under-used. The balance of trade is positive only for conifer and broadleaf roundwood, but the surplus by no means covers the overall deficit. The largest trade deficit is in wood furnishings (-2 billion euros). The deficit is also large for "paper and cardboard" (-1.6 billion euros), and "other mechanically processed wood products" (-690 million euros).

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Other income from forests

An abundance of non-timber forest products*

Rank	Products	Main species	Sale price of NTFP extracted (x1000 euros)
1	Game	*Sus scrofa (boar)*	203 090
2	Honey	*Robinia pseudoacacia*	29 445
3	Mushrooms	*Cantharellus cibarius*	16 000
4	Medicinal, aromatic and perfumery plants	*Vaccinum myrtillus*	5 450
5	Cork	*Quercus suber*	494
6	Forest seeds	*Quercus robur*	1 300

** Non-timber forest products (NTFP) are defined by the FAO as tangible, physical objects of biological origin other than wood derived from forests.*

Source 7

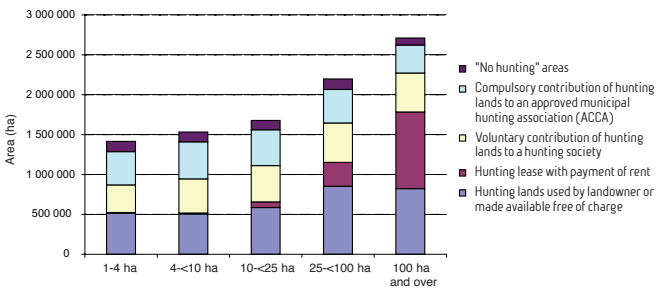
Hunting

Wild fauna populations have steadily increased in recent decades. Animals browse, rub on and trample saplings, sometimes compromising woodland regeneration and forestry work if their numbers are too great.

550 000 boar were killed during the 2013-2014 hunting season (an 8.9% drop compared to the previous year). Red deer numbers and kills are increasing steadily, with 58 000 animals shot in 2013-2014, or 3.6% more than in 2012-2013.

Roe, sika and fallow deer have also increased in number in the last 20 years and are adding to game pressure on young saplings, despite variable annual kill numbers.

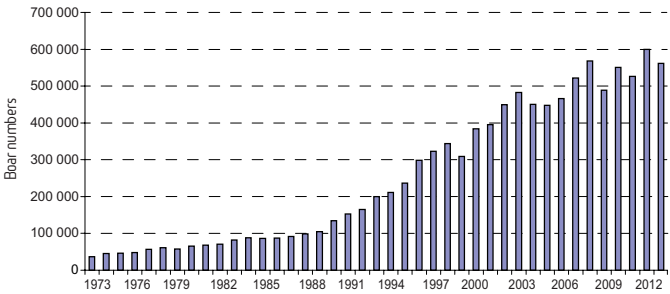
Area of forest properties under hunting regulations
(Alsace and Moselle not included)



Source 12



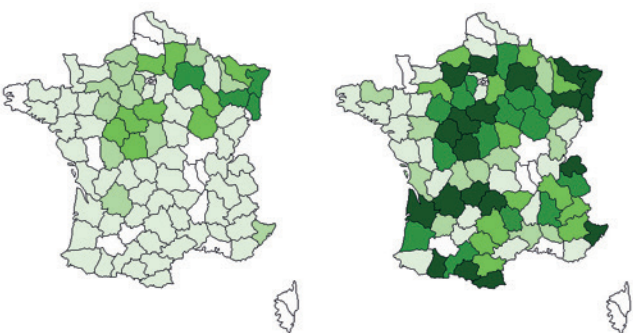
Boar kills since 1973



Source 18

Estimated number of red deer per *département* in 1985

Estimated number of red deer per *département* in 2010

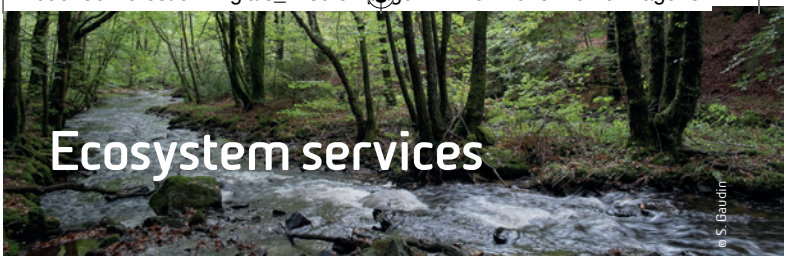


Source 18

Red deer populations in France have been expanding rapidly since 1985, in terms of both numbers and forest areas colonised.

In 2010, red deer were found across 7.4 million hectares of forests, as against 3.9 million in 1985.

Red deer numbers in France have increased fourfold in twenty years, from about 36 800 in 1985 to about 161 000 in 2010.



Ecosystem services

In drawing up sustainable management plans, foresters include the ecosystem services provided by forests, although these are not paid for at present. They also develop tools to help them meet expectations from society, particularly as regards biodiversity conservation, protecting water quality and climate change mitigation through carbon absorption.

FORÊT ET BIODIVERSITÉ
CENTRE NATIONAL de la PROPRIÉTÉ FORESTIÈRE

The CNPF has developed an Index of Biodiversity Potential (IBP) to help managers make the best choices in drawing up their management plans when their concerns include biodiversity management. This tool is well suited to its purpose and gaining in popularity: 30% of the forest owners surveyed who use the IBP say it has changed their attitude to their forests.

The IBP is based on scientific findings on recognised criteria such as species, tree diameter, deadwood, etc.

It has also been adopted by other public-sector players such as nature parks, NGOs and government administrations.

IBP is now a registered trademark and logo.

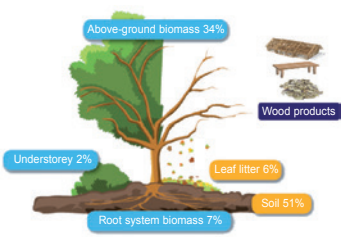
Emissions: forests absorb 12% of all CO_2 emissions in France.

Average carbon stocks in 1 hectare of forest: **550 tCO_2/ha, or twice to three times more than in a cropfield.**

> **Sequestration:** each year, France's forests absorb some 59MtCO2, or about 12% of its CO2 emissions.

> **Storage:** products made from wood continue to store carbon - wood products are estimated to increase net carbon storage by **4.7 $MtCO_2$** per year.

Carbon stocks in the different forest compartments



Source 8

> **Substitution:** using wood avoids GHG emissions from using materials of fossil origin.

Using 1m³ of construction timber saves 0.8 tCO_2

Using 1m³ of fuelwood saves 0.46 tCO_2

Source 19

1 m³ of wood ≈ 1 tCO_2 = 2.4 barrels of petroleum or 4800 kms travelled by car

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Water quality: a sensitive issue of crucial importance for the future

Water quality is a sensitive issue in France

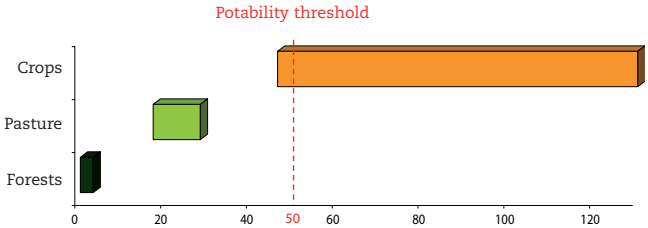
40% of water abstraction points abandoned from 1998 to 2008 were closed due to substandard water.

In most cases, the causes of these closures were nitrate and pesticide problems.

Forests protect water

Forests are the ideal plant cover to keep nitrate concentrations down.

Nitrate concentrations in water below roots (at 1.10m in depth) in different land use categories in the Lorraine



Source 20

Very few pesticides are used in forests: herbicide use is 450 times lower in forests than on cereal crops

FORESTERS HAVE AN IMPORTANT ROLE IN MAINTAINING WATER QUALITY

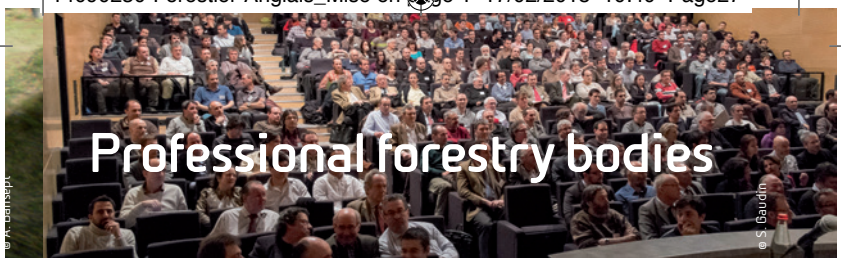
Precautions have to be taken when abstraction points are vulnerable, e.g. shallow springs.

- **40 to 80 €/ha:** additional cost of forestry actions to preserve drinking water quality at Masevaux (Upper Rhine).
- **6 €/m³ of timber:** grant amount to owners who agree to apply operational forestry specifications (agreement between the Moises inter-municipal water authority and the *Association Syndicale* Libre Forestière du Mont Forchat - Haute-Savoie). This represents a cost of 0.25 € per m³ of water produced.

  As an indication, the average total price of water on 1 January 2011 was 3.66 €/m³, of which 1.93 €/m² was for drinking water.

Source 21

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Professional forestry bodies

French national federation of private foresters

The FNSFP (French national federation of private foresters) is the umbrella organisation for:

18 regional bodies and **78 *département*** or **inter-*département* bodies, representing 40 000 members.**

The FNSFP represents and defends the interests of private foresters and private forests to French and European public authorities, partners in the forests and timber sector and non governmental organisations involved in the forestry sector.

The FNSFP **keeps forest owners informed** on policy, legal, environmental and economic issues, thereby helping them to manage their forests as responsible economic players and encouraging them to commit to sustainable methods to manage their forests.

The forestry bodies in each *département* develop initiatives to encourage forestry activities, representing them to the local public authorities and relaying the activities undertaken by the FNSFP at the national level.

The FNSFP has developed numerous initiatives and tools for forest owners and the forestry and timber sector.

It was one of the drivers of the **PEFC** certification initiative for sustainable forest management, enabled the creation of the **FORINVEST** fund to support investment and innovation in the timber sector and designed and helped to develop **SYLVASSUR**, an insurance mechanism for damage to forests, in partnership with Lloyds and insurance brokers Verspieren.

It is building up an **advocacy network**, FRANSYLVA, among political and industrial representatives to promote sustainable forest management and the recognition of forest services such as carbon fixing, climate change mitigation and clean drinking water supplies.

The CNPF – National Centre for Private Forest Owners

The CNPF is a public administrative body working for all private forest owners.

Because its activities concern privately owned forests, a law was passed (on 6 August 1963) to create a public professional institution governed by an elected board of private forest owners. These provisions were subsequently applied in several phases, up to 2009 and 2010 when the CNPF was set up as a single public institution grouping together the 18 regional professional centres for private forest owners (CRPF), the national centre (CNPPF) and the Forestry Development Institute (IDF).

The overall mandate of the CNPF is to promote forest development, management guidelines and improved forest production (Art. L. 321-

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1 of the Forest Code). Under the Forest Code, the CNPF is responsible in particular for:

Setting management guidelines by developing regional forestry plans and guides to good forestry practice, and by handling the approval process for the voluntary or compulsory simplified management plans submitted by owners of more than 10 ha of forests and for the standard management rules set out by forestry cooperatives and experts for their members or clients.

Providing advice and training by disseminating sylvicultural methods that it perfects and adapts through studies and trials, and through general advisory and technical training activities for forest owners.

Developing and promoting different ways of **grouping owners together,** especially through cooperation, in the interests of sound forest management, product marketing, forestry operations and improving the structure of forest lands. These groups are often formed through facilitation efforts with local stakeholders.

These activities are conducted within the overall context of forest health monitoring, environmental protection, sustainable development, planning and risk prevention.

> The CNPF is organised into 20 departments at different administrative levels:

> At the national level to pool resources and staff management.

> At the regional or inter-regional level where the 18 CRPF work directly with local stakeholders. The law hands direct responsibility to the CRPF for regional private forest management policy and for handling the approval process for the relevant management documents. Professional representation comes under the remit of the regional level, as the national board of governors is made up of regional representatives.

> The CNPF also has a specialised research and development department, the IDF (Forestry Development Institute).

Forestry cooperatives (UCFF-GCF)

The forestry cooperatives have a total of 112 000 members, manage 2 million hectares of forests and market some 7 million m^3 of wood each year (including 400 000 tonnes of wood chips for heating). They employ 900 people and generate an annual turnover of 350 million euros.

The cooperative forestry system includes 17 cooperatives and other management groups working across France. They are represented by the UCFF (Union of French Forestry Cooperatives) and the GCF (Forestry Cooperation Group).

The UCFF represents policy issues to the public authorities and the different inter-professional bodies in which the cooperatives are involved (wood and forests, energy and biomass, environment, cooperatives). It defends the interests of cooperatives and management groups.

The GCF is the economic agency for forestry cooperatives. Eight of the GCF member cooperatives have become involved in fuelwood production (forming France's leading cooperative wood-chip group)

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and in dual PEFC and ISO 14001 certification for sustainable forestry. The GCF is also a purchasing platform and training organisation.

The forestry cooperatives play an important role in creating private forest owners' groups to drive improvements in forest production and management.

The particular strengths of forestry cooperatives lies in their close engagement with issues in the field and with the local economy. Each cooperative covers a particular district, in which it works closely with its members and their forests.

The forestry cooperatives operate as a network, thus helping to develop the structure and organisation of the forests and timber sector. As economic operators, they make investments to improve the competitiveness of the timber industry and to secure supplies of raw materials.

Forest cooperatives engage in a wide range of activities:

> Forest management,
> Expert studies on forests,
> Sylvicultural work and reforestation,
> Tree nurseries,
> Access to ISO 14001 and PEFC certification,
> Supplying timber, industrial wood and fuelwood to industries,
> Research and development.

Registered professional foresters

Registered foresters are qualified professionals specialising in forest management for owners and whose qualifications are officially recognised by the French national council of agricultural and forest property experts (CNEFAF) as complying with the professional ethics rules set out in the Rural Code (Articles L171 and R171.1 and those following).

Registered foresters work in the following areas in particular:

> Planning: development of simplified management plans;
> Management as project owners: contracting work, sylvicultural operations, felling operations from timber marking to sales, hunting management, administrative and financial management;
> Audits and advisory services on all technical, legal, fiscal, economic and other forest-related topics;
> Evaluations or expert appraisals of woodland estates (purchases, sales, inheritance, damage claims), valuation of hunting leases, timber sales, performance of forest tree species, etc.

127 out of the 164 registered forestry experts are CNEFAF members. 71, as well as 32 trainees, are members of the national association of forest engineers, registered foresters and timber experts (CNIEFEB).

The area managed by the CNIEFEB experts covers 950 000 hectares.

The 30 to 40 experts not registered with the CNIEFEB manage 50 000 to 100 000 hectares, bringing the total area managed by forestry experts in mainland France to around 1 million hectares.

In 2012, about 3.5 million m^3 of timber (all species and grades) were sold, including 2 million m^3 of lumber. Grouped sales accounted for half of the total volume.

Notes...

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Sources:

1 - National forests inventory (IFN)
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