

Criterion overview

Criterion goals

This criterion aims to assess the quantity and value of the produced goods and marketed services as well as to make sure that these productions are sustainable using multipurpose management.

The information compiled encompasses highly-contrasting local situations in terms of forest types, forest management (Aquitaine forests, Mediterranean forests, etc.) and of ownership.

The indicators proposed focus on matching the available resource and the annual timber harvest (**3.1**), the ease of access to the resource for logging purposes (**3.1.1**), the creation of value from marketing timber and non-timber resources and forest services (**3.2, 3.3, 3.4**) and the existence of sustainable management documents which ensure steady production of goods and services, forest regeneration and smooth functioning of the forest ecosystem (**3.5**).

Analysis

On average, 50% of the net timber production was felled in 2010 (mean year). The felling rate varies between regions and species: the felling rate of broadleaved species is highest (more than 60%) in the North and East of France whilst the rate for conifers is more than 70% in Alsace, Picardy and Franche-Comté and over 100% in Aquitaine. Conversely, felling rates are far lower in the South-East and Corsica. These globally low felling rates go hand-in-hand with a large increase in volume per hectare over the last thirty years. These capitalizations are the result of an increase in productivity per hectare, combined with expanding areas and a shortfall in fellings and stand renewal.

The forest logging potential reveals the technical and financial brakes on full mobilization of the available wood resources. About 60% of French forests (in surface and in volume) is easily accessible for timber harvest. Nevertheless, to the accessibility varies widely between regions, as reflected by the intensity and frequency of fellings.

An estimated 62 million cubic meters of timber were harvested in total in 2013, a level close to the annual average of the last twenty years, with the exception of 80 million cubic meters harvested after the December 1999 storms. Of the 62 million cubic meters harvested in 2014, 38 million cubic meters were marketed for a value of 1.8 billion euros, i.e. €49/m³ on average. Nearly half of the harvested volume is subject to sustainable management certification.

Due to their diversity, the multiplicity of players and the lack of systematic statistical monitoring, it is far more difficult to assess the harvest and marketing of non-timber forest products and the production of forest services. It goes without saying that non-timber products remain a primordial issue in sustainable development. Not only do they generate additional – sometimes substantial – revenue for the managers or other players in the sector, they also make a substantial contribution to regional development and maintaining landscapes and forest spaces. Their multiplicity illustrates the variety of goods and services provided by multipurpose forest management. Although most of the non-timber goods and services remain non-commercial (biodiversity, recreation, carbon storage, water quality preservation, etc.) – see Criterion 6 –, some can be marketed and therefore have a commercial value. This is especially true of venison, cork, truffles, forest seedlings and seeds, honey, Christmas trees and hunting licenses which generate a global commercial value of several tens of millions of euros every year.

Lastly, the total surface area of French forests with an approved sustainable management document accounts in 2014 for more than 48% of the wooded area in France. There is an overall upward trend over the period.

Overall, French forest management seems to ensure the sustainability of forest productions: the forests are fairly accessible, the felling rate remains lower than the biological production, revenues from marketing timber as well as other products and services are globally on the up, the surface areas subject to sustainable management are increasing.

However, the performance of the French forest management must be analysed more broadly: it is important to maintain non-commercial forest functions (see especially Criteria 4 and 6), to monitor the health of forest ecosystems (see Criterion 2) and to ensure the survival of the forest (see Criterion 1) whilst all the time seeking to optimize the timber harvest. Over-logging may well be prejudicial but under-logging is not necessarily a good idea either, as it deprives society of a renewable resource (material and energy) which could help improve the trade balance, employment and environmental performance.

Several factors contribute to limiting logging of the available resource. In a context of growing international competition, poorly-controlled mobilization costs can discourage from harvesting in certain forests. Thus, apart from the fragmentation and growth in logging costs, the proportion of forests (and growing stock) which are less accessible increases and the logging rates drop quickly with the difficulties. At the same time, the French and European forest sector is still very out-of-step with successful promotion of the broadleaved resource which is predominant in France. Thus, less logging takes place in broadleaved forests on average than in conifer forests and the resource increases steadily. Conifer forests are most in demand, except in difficult logging conditions (mountains). Lastly, the value creation distribution changes to the detriment of large trees due to a lack of suitable industrial tools in the country.

These observations are more or less acute according to the regional contexts, the species and types of timber, which justifies continuing reflections reconciling national interests and specific local features in line with the challenges and characteristics of the forests (region, massif, etc.).

Conclusion

The majority of the results presented in this criterion come from proven sources. However, their robustness can differ: the data are sometimes generalized from small samples, aggregated from varied or partial sources and methods, expert estimates, etc. (see Indicator 3.3 for example). Thus, despite the care and rigor in drawing up these sustainable management indicators (method exactness, presentation of confidence intervals, etc.), they must be handled and interpreted with care, mainly and perhaps above all when making international comparisons.

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