PROGRESS REPORT
ON COMPILING INFORMATION
ITALY
COST Action E30
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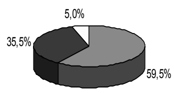
Our main problems in country report preparation

10 problem-area

1. Forests = mountain



95% of the forests in hilly and mountain regions:
= less developed areas
(income= tourism and some quality farm product)

→ multi-funcional forests (soil protection, water cycle regulation, fuelwood and timber production, recreation, …)

Very few data on all the public functions

2. Local & small owners

forestland ownership:
- 60% private (former farmers): 3 ha/firm
  800,000 forest owners
- 40% public
  - Local municipalities
  - Local communities

No data on farm accounts based on a representative survey

3. Expansion of forest cover

1950 = 5.5 M hectares
2000 = 10 M hectares 2-3 million hectares under natural conversion to forests (mainly in mountain areas)

No good data on revegetation and natural forest expansion (who owns the land? Owners' motivation?, etc.)

Pink areas = mountain
Black spots = land under conversion

Strong Euro, low international prices of wood, lower domestic demand →

4. Decreasing active management

Wood production = 10 M cubic metres
(60% fuelwood)
NAI = 25-35 Million cubic metres
Removals/MAI = the lowest in Europe (after Slovenia – source: FAO)

No good data on wood removals (esp. for fuelwood)

No updated inventory data

5. Fast growing plantations

Poplar plantations in the Po valley:

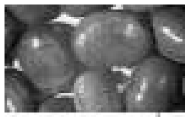
- Rotation period: 10 yr
- NAI: 15-20 cm/ha/yr
- only 70,000 ha but…
- = 55% of Italian removals of industrial timber
- IRR = 5-7%

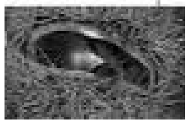
New investment:

- plantations of **walnut, cherry, ash, maple,...**
- SRF

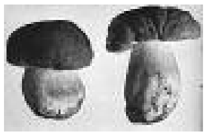
No market intelligence on the new markets for high quality broadleaves ⇦ **CAP reform**

6. NWFP





- New positive market development for a lot of NWFP: a mosaic of niche products
- Income from mushrooms, chestnut, truffles, berries, medicinal and aromatic herbs > than from timber production



No regular survey, very low quality of statistical data, informal low-scale economy

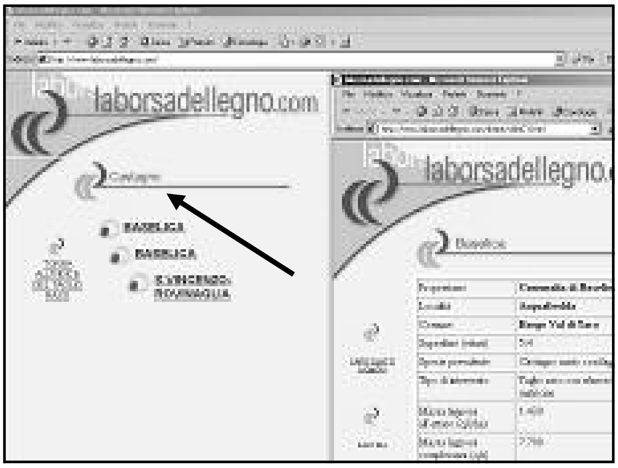
An example: Chestnut

Networking and promotion

- Network of local communities (the Italian *Associazione Nazionale Città del Castagno*)
- Project of international cooperation («Castanea» under the EC Leader Project among GLA from I, SP and P)
- *Strada del Castagno* (the Chestnut Road) in Tuscany (agri-tourism activities); similar initiative in Trentino
- Fairs, Exibitions, Museums

New selling systems

- Many **local associations** among forest growers for processing and marketing wood products and fruits
- "**Pick-up your chestnuts**": selling directly to the consumers the right to collect chestnut (and making a pick-nick) for a fixed rate or in relation to the weight of collected fruits
- **e-business**:
  - B2B: standing tress, logs, semi-finished products, …
  - B2C: jams, dried nuts, furniture, DIY, poles, …



7. A strong, dynamic, flexible wood-working industry

Basic structural data (M Euro)

Turnover	37,000
Exports	15,000
Imports	11,000
Employed	420,000
Firms	90,000

3-4% of the national industrial output

1st world exporter of furniture

the 2nd European importer of wood products

A very large forestry sector (even larger considering the "forest cluster")

Delocalisation, new trends

8. Large imports (6th world importer)→ enhanced substitution technology

- Medium Density Fibreboards
- Multi-laminar wood and veneer sheets
- Recycled paper for high AV products
- Engeneered products, Bi-laminated beams, KVH, "T beams", etc.
- Particle-boards entirely made-up with recycled wood ("Ecological panel")

(2002)

	Daily consumption	Annual consumption	Note
1st producer of particleboard	5,000 ton	1.8 M ton	**100% recycled wood**; 40% imported (F,CH,G)
2nd producer of particleboard	2,400 ton	430,000 ton	**60% recycled wood**
1° MDF producer (3rd of particleboard)	3,000 ton	1.4 M ton	**70% recycled wood for particleboard production**

The role of recycling in wood procurement by industries?

9. R&D

Cuts in State budget, new sources of fundings, Bologna process

→ fragmentation of research activities

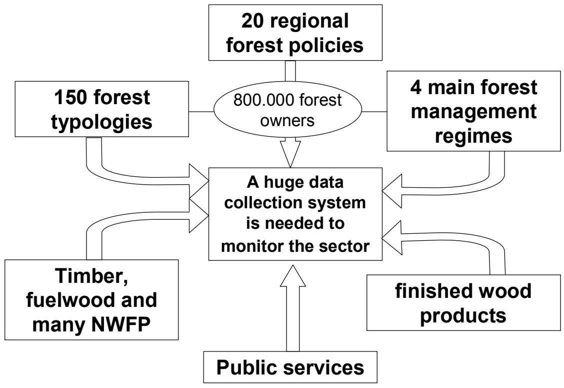
→ prevalence of short-term research projects

No good DBs on research projects

10. Decentralisation

- A federal administrative structure in the forest sector

→ Many different institutional arrangements in forest policy implementation at regional level



"*Italians hate their forests*" (Stendhal)

Probably now they like their forests,

but still we need to collect a huge amount of data to improve our understanding of the sector and to enforce forest policies