

“Smallholders as drivers of the local economy, sustainable forest management and momentum for the bioeconomy”



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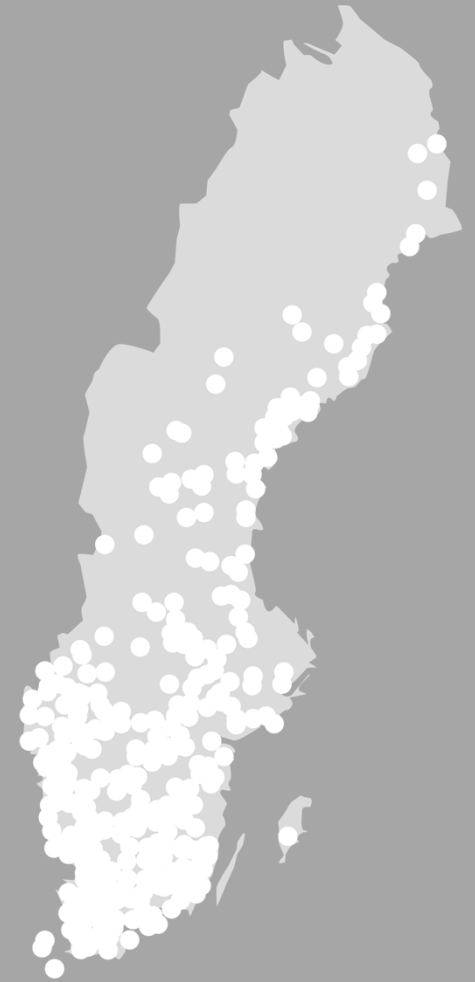


SFIF - The organization for Swedish pulp, paper and woodworking industries

Pulp and paper; ~ 50 mills in 23 groups/companies

Sawn timber; ~120 sawmills in 60 groups/companies

Other; ~ 40 companies closely connected to the production of pulp, paper and sawn timber.



Forest Owners Associations

	Members	Forest land 1 000 ha
Södra	51 000	2 360
Mellanskog	26 000	1 677
Norrskog	12 000	1 013
Norra	15 000	1 102
Total	104 000	6 152



This is Mellanskog



26,000 members.
210 employees.



4.4 million m³sub wood



A forest owner's
association



SEK 3.0 billion in
sales



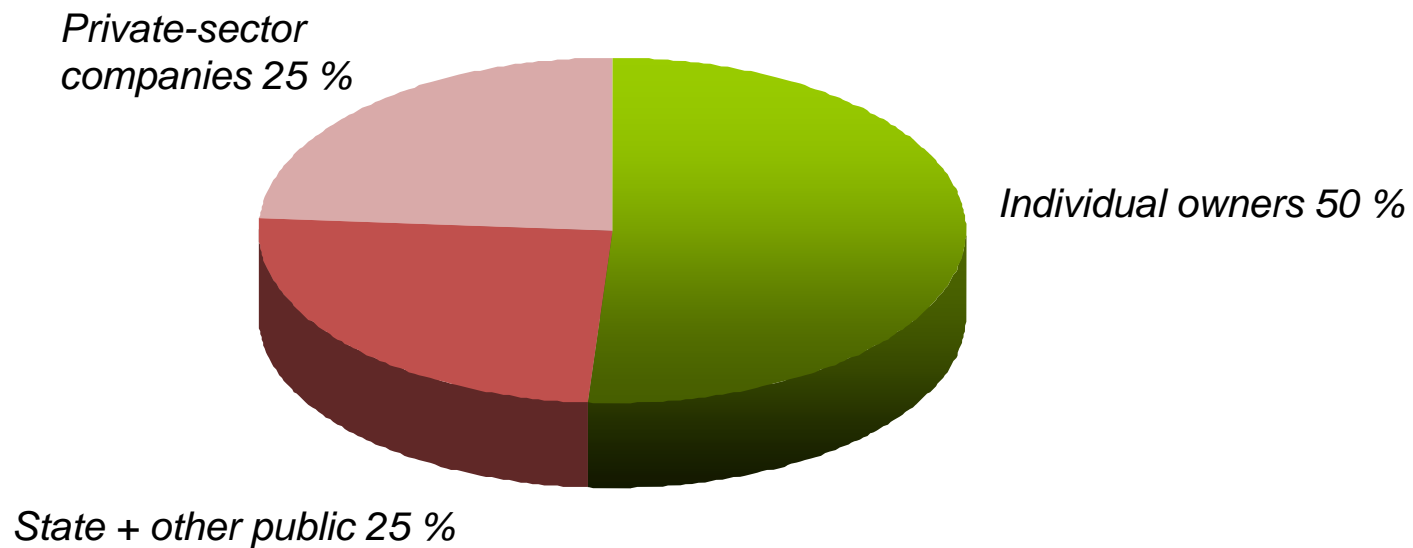
1.7 million ha
forest land



Part-owner of Setra
Group AB (49.5%)



Ownership of Forest Land in Sweden



A historic perspective



Sustainable forest management

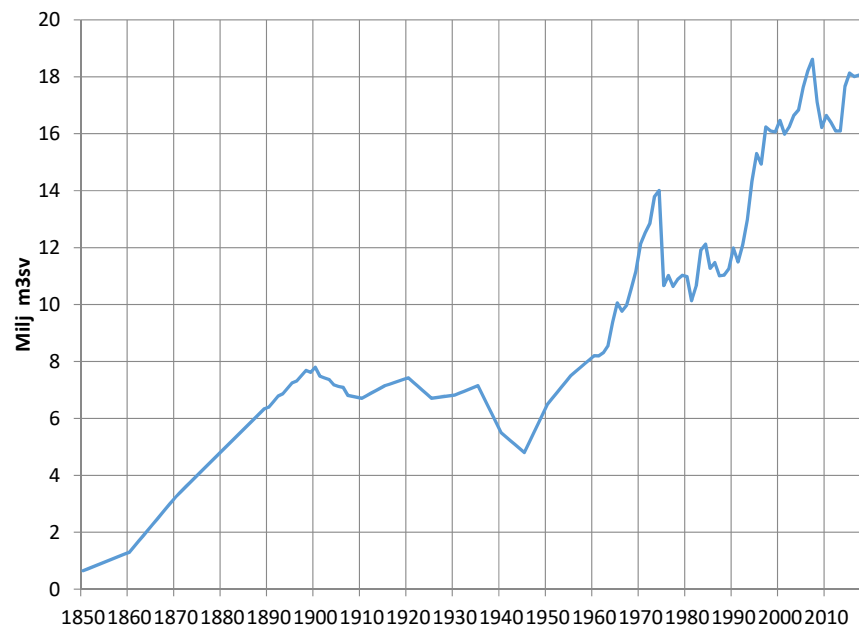
- Deforestation and forest degradation, 1600-1900
- Sustained yield, 1903- 1980
 - Science based approach
 - Forest Acts focusing on reforestation and increased growth
 - Information
 - Monitoring
- Sustainable Forest Management, 1980 –
 - Forest policy since 1994
 - Production and environment on equal pillars
 - No taxes – no subsidies = Market driven
 - Sectorial responsibility to contribute to the preservation of biodiversity

A growing movement of forest owners

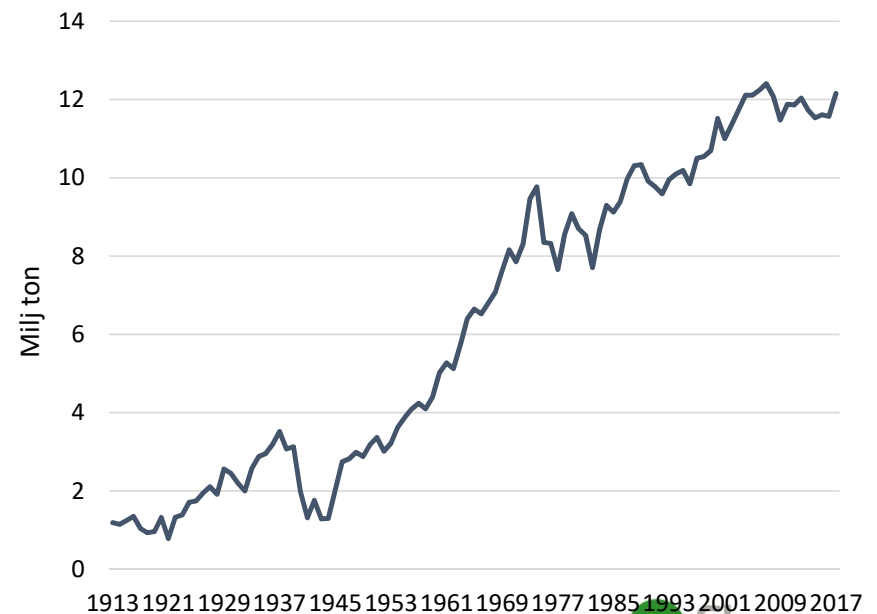
- Mid 1800;s large scale industries vs. small scale farmers.
- Large scale deforestation
- Empowerment through education and cooperation.
- 1906; the first forest owner's association.
- A large number of different forest associations were created
- Consolidation over the decades to come
- Precursors to Mellanskog.

Development of Sweden's Forest Industry

Production of Sawn Softwood 1850-2017



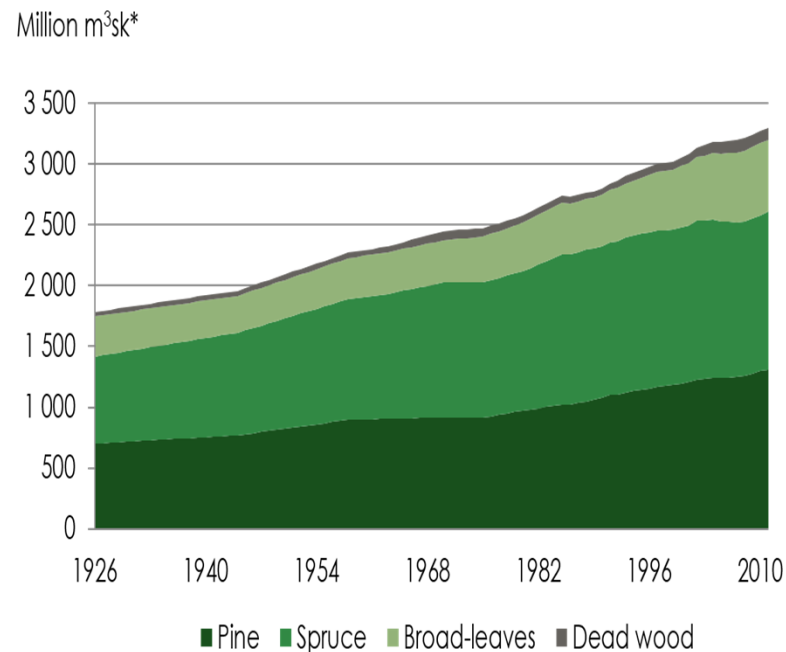
Production of Pulp 1913-2017



The whole tree is put to use



Development of the Swedish Forest Resources



* m³sk = Forest Cubic Meters

Important factors:

- Policy development
- Land tenure rights
- Competitive industry
- Research
- Forest Management - Information and training



Forestry and forest policy of today

Swedish model of forest management



- Freedom under responsibility.
- Sectorial responsibility
- Equal goals. Production and environmental sustainability.
- Certification (FSC and PEFC)

Future challenges for the Swedish model?

- Maintaining international competitiveness
- An increased demand for biomass
- Reach greater consensus on targets for our forests
 - production, climate benefit, biodiversity, social aspects.
- Urbanization and a new generation of forest owners
- Long term perspectives in a world that's spinning faster and faster.

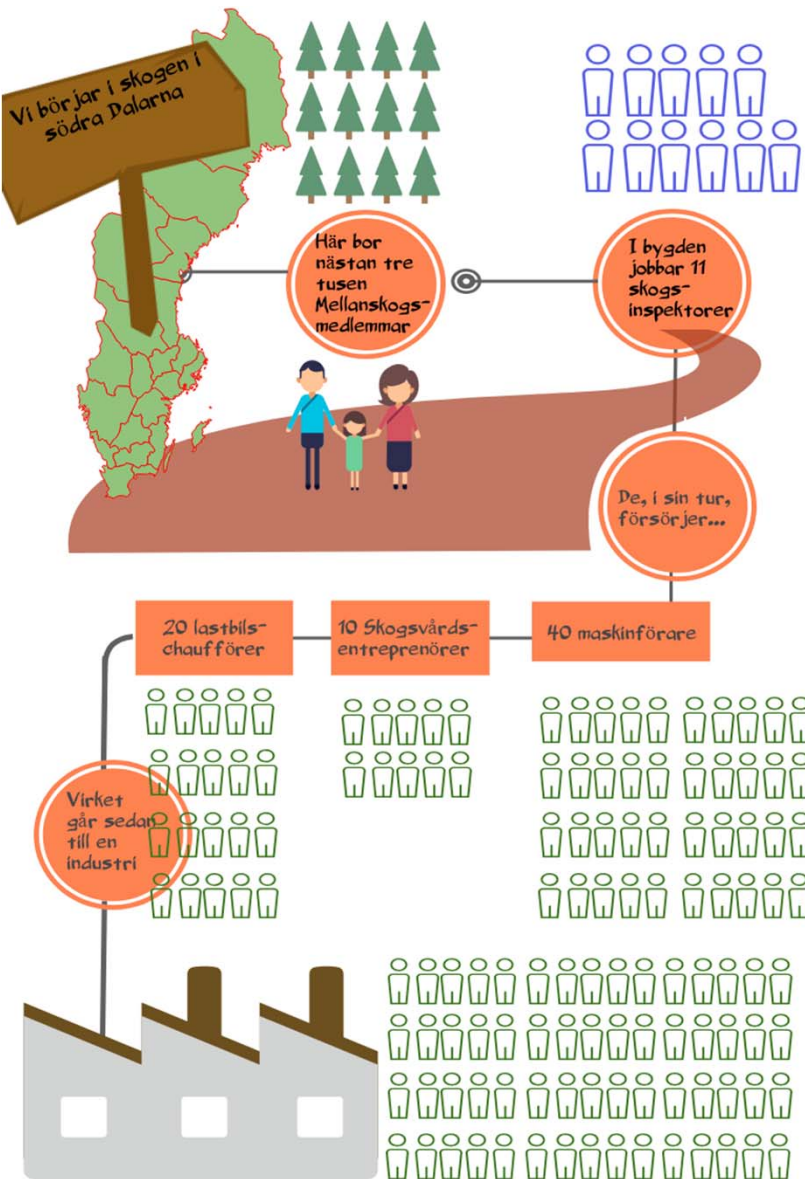
Forestry through a gendered lens

- 38% of forest owners are women
- Largest group of female entrepreneurs in Sweden
- Women are underrepresented in all parts of the forest sector
- We do less business with female forest owners
- #meetoo in Swedish forestry
- Missed business opportunities
- A challenge in recruiting and in future competitiveness



Circular biobased economy



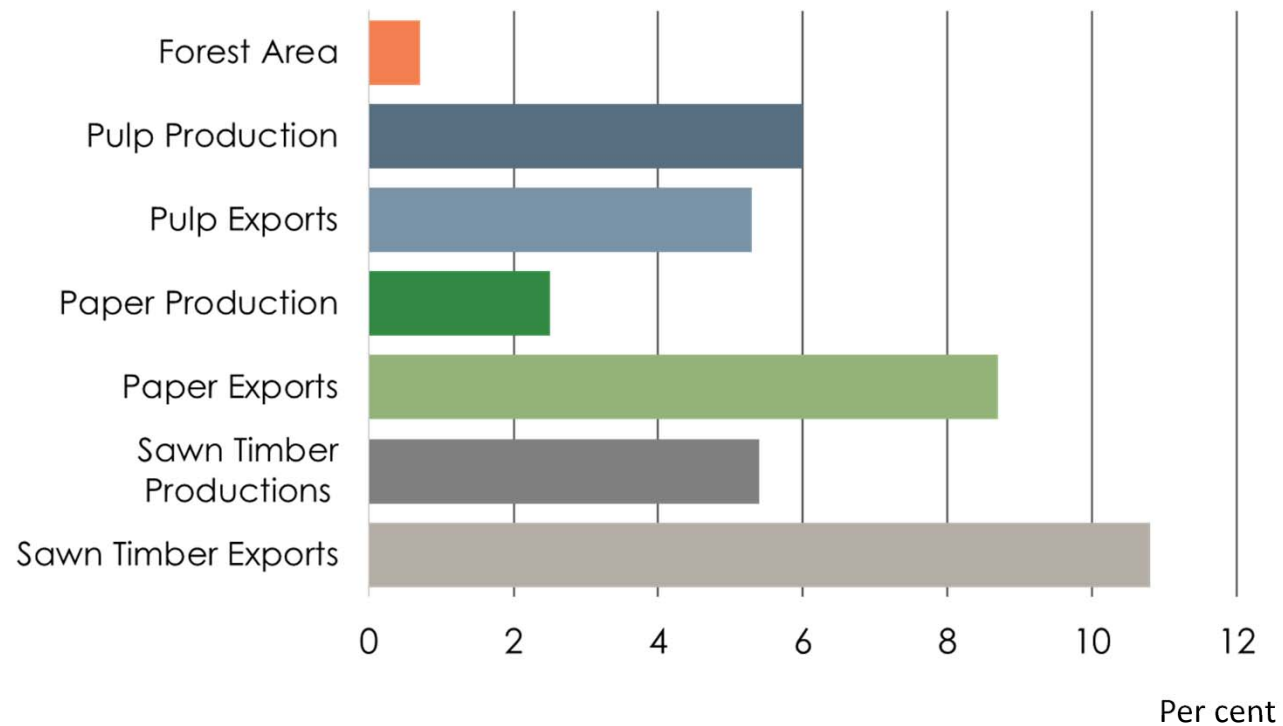


Forest owners - drivers of the local economy

- Sweden, a sparsely populated country.
- Processing creates jobs
- Closely linked to infrastructure, community services etc.



Sweden's Share of the World's:



Source: Swedish Forest Industries Federation, Swedish Forest Agency, RISI, FAO