



INTERNATIONAL
COUNCIL OF
FOREST & PAPER
ASSOCIATIONS



ICFPA 2025

SUSTAINABILITY PROGRESS REPORT

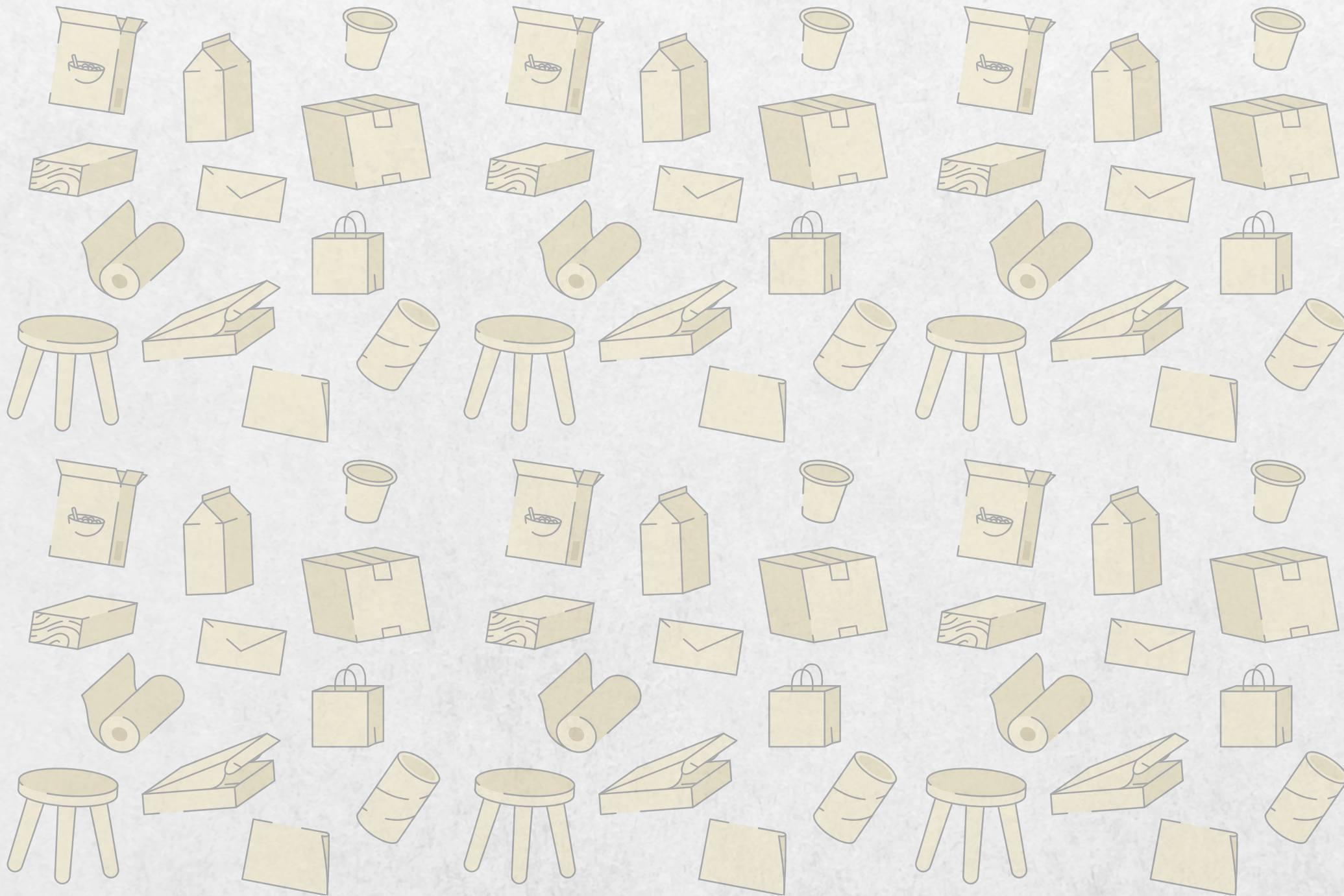


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About the *International Council of Forest & Paper Associations (ICFPA)*

The International Council of Forest & Paper Associations (ICFPA) is a global collaboration of forest, pulp, paper, wood and fibre-based industry associations, representing many of the world's leading producing regions.

Through dialogue, coordination and collective action, the ICFPA advances sustainable forest management, responsible manufacturing, innovation and policy coherence across international markets.

This report outlines industry-wide progress against shared sustainability commitments, building on the foundation established in the 2019 Global CEO Leadership Statement 2.0 and informed by the latest performance data compiled by the National Council for Air and Stream Improvement, Inc. (NCASI).

Our commitments align with the United Nations Sustainable Development Goals, reflecting the sector's contribution to climate action, resource efficiency, and responsible consumption and production.



ICFPA Steering Committee



ICFPA Past President:

Heidi Brock

President and CEO

American Forest & Paper Association (AF&PA)



Elizabeth Heeg

Chief Executive Officer

New Zealand Forest Owners Association (NZFOA)



ICFPA Incoming President:

José Carlos da Fonseca Jr.

Executive Director

Brazilian Tree Industry (Ibá)



Jane Molony

Executive Director

Paper and Allied Manufacturers of South Africa (PAMSA)



ICFPA Incoming Vice President:

Ogawa Tsunehiro

Japan Paper Association (JPA)



Derek Nighbor

President and CEO

Forest Products Association of Canada (FPAC)



Viveka Beckeman

Director General

Swedish Forest Industries Federation (SFIF)



Jori Ringman

Director General

Confederation of European Paper Industries (Cepi)

Global Sustainability Leadership

The forest and paper-based sector continues to demonstrate leadership through measurable performance improvement, long-term investment and science-based reporting. The ICFPA's performance metrics provide a transparent, internationally comparable view of progress across core environmental, social and economic indicators. The current reporting cycle reflects continued momentum in emissions reduction, energy transition and circularity, while recognising areas where sustained effort and innovation remain essential.

Innovation in Forest-Based Value Chains

Innovation in forest products is driving a sustainable circular bioeconomy by transforming wood and non-wood biomass into high-value, low-carbon alternatives to fossil-based materials. Forest-based value chains therefore represent one of the most advanced and scalable foundations of the global bioeconomy.

Continued innovation is essential to sustain progress and unlock new value. ICFPA members are investing in advanced manufacturing, bio-based materials, digitalisation and process optimisation. These innovations strengthen competitiveness, reduce environmental impacts and enable the development of next-generation products that support global sustainability objectives.

Looking Ahead

As global policy expectations and market demands continue to evolve, the forest products industry remains committed to transparent reporting, continuous improvement and constructive engagement with stakeholders worldwide. The ICFPA will continue to refine its performance metrics, support science-based policymaking and demonstrate the sector's essential role in a sustainable future.



Progress on Our Commitments

Global Performance	Baseline Year	Reporting Years (2022-2023)	Progress
Responsible Fibre Sourcing			
Sustainable Procurement Percentage of forest-based wood fibre procured from certified sustainably managed forest sources	12% 2000/2002	51%	+39 percentage points
Global Recycling Rate Recovered paper used by mills as a percentage of global paper and paperboard production	46.5% 2000	62%	+15 percentage points
Manufacturing & Energy Performance			
GHG Emission Intensity Scope 1 + Scope 2, metric tonnes carbon dioxide equivalent per metric tonne production	0.689 mt CO ₂ e/mt 2004/2005	0.489 mt CO ₂ e/mt	-29%
Bioenergy and Renewable Fuel Percentage Percentage on-site energy needs met by biomass and other renewable fuel sources	53% 2004/2005	66%	+13 percentage points
Total On-Site Energy Intensity Gigajoules lower heating value per metric tonne production	18.2 GJ LHV/mt 2004/2005	18.1 GJ LHV/mt	-0.6%
Sulphur Dioxide (SO₂) Emissions Intensity Kilograms sulphur dioxide per metric tonne production	2.0 kg SO ₂ /mt 2004/2005	0.39 kg SO ₂ /mt	-80.5%
Sustainable Water Management			
Cubic metres process water discharge per metric tonne production	36.1 m ³ /mt 2004/2005	33.8 m ³ /mt	-6.4%
Workforce Safety			
Number of recordable incidents per 2,000,000 hours / number of hours worked by all employees	4.11 2006/2007	2.81	-31.6%

Promote Sustainable Forest Management (SFM)

Forests cover approximately 31% of the world's land surface and underpin livelihoods, ecosystems and climate stability worldwide. Sustainable forest management (SFM) is a foundational commitment for ICFPA and its members, enabling the conservation of forests while supporting the responsible supply of renewable forest-based products that are integral to modern life. When forests are sustainably managed, they play a central role in achieving global climate objectives through carbon sequestration, long-term storage in products and the substitution of more emissions-intensive materials.

Despite this potential, SFM is not yet a mainstream activity in all countries or regions. According to the Forest and Agricultural Organisation (FAO), significant areas of forest continue to be converted to other land uses, underscoring the importance of credible, market-driven approaches that reward responsible management. In contrast, the forest products sector represented by ICFPA members ensures regeneration, replanting and long-term stewardship of forests used for commercial purposes. Continued demand for wood and paper products supports sustained investment in SFM, reinforcing the economic viability of keeping forests as forests.

Progress towards this commitment is measured through the proportion of forest-based wood fibre supplied by certified, sustainably managed forest sources. Certification is defined as forest area certified under systems formally recognised by the Forest Stewardship Council® (FSC®) and/or the Programme for the Endorsement of Forest Certification (PEFC).



Based on the most recent reporting cycle, ICFPA member associations reported that

51% of the forest area supplying their industries in 2023 was certified to FSC® and/or PEFC,

reflecting an **80% increase** in certified area since the baseline year in the early 2000s and sustained high levels of certification over more than a decade.

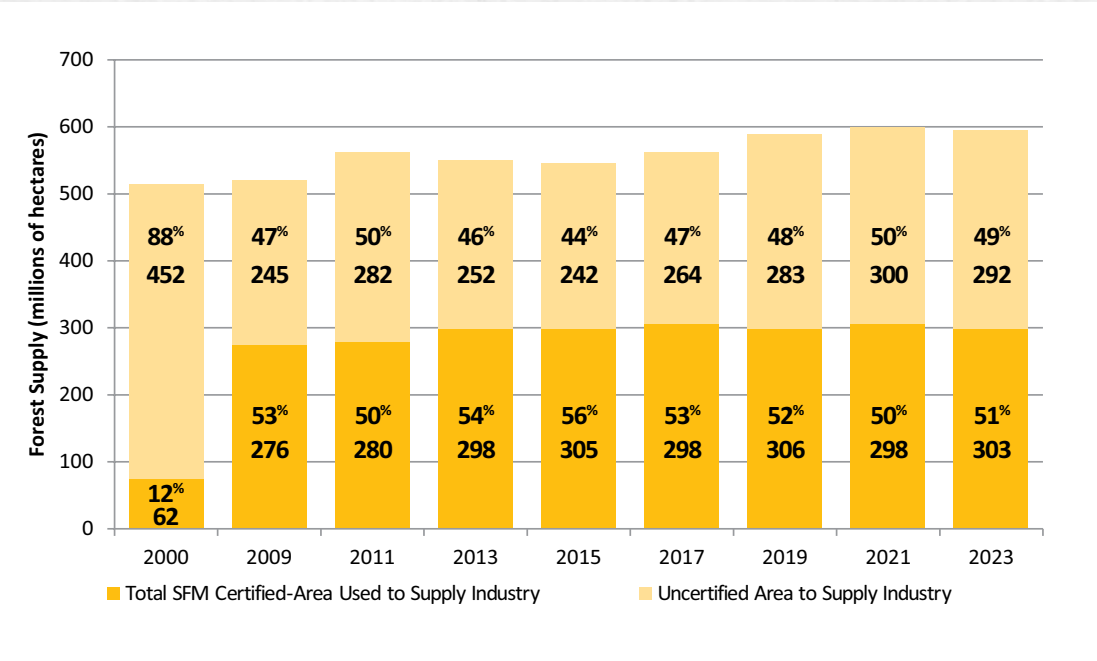
Seven ICFPA member associations, representing 24 countries, provided data for the current reporting cycle. Together, these associations account for approximately 303 million hectares, or nearly two-thirds, of the 463 million hectares of forest certified globally under FSC® and/or PEFC. As in previous reporting periods, around three-quarters of the world’s certified forest area is in North America and Western Europe, collectively representing more than 95% of the certified area reported by ICFPA members.

The expansion of SFM certification since 2000 reflects strong market signals, leadership by national and regional industry associations and the recognition that independent certification is essential to maintaining responsible sourcing and chain of custody, market access and stakeholder confidence. Since 2009, the total area of certified forest supplying ICFPA members has remained relatively stable. This reflects both the near-maximisation of certification across industrial forest lands in key regions and ongoing structural changes in forest ownership and land management.

In many regions, a substantial share of forest land is owned by small private forest owners or small-scale timber growers.

While SFM practices are often applied, the cost and administrative requirements of third-party certification can present barriers for small-scale owners. Addressing these challenges through supportive policies, capacity building and inclusive approaches will be critical to extending the benefits of SFM beyond the areas where certification is already well established.

Total and Percent of ICFPA Member Managed Forest Supply Area Certified under PEFC and/or FSC



1 The State of the World's Forests 2024. Food and Agriculture Organization of the United Nations. <https://doi.org/10.4060/cd1211en>

Case Study: Japan Paper Association Members Advance Sustainable Forest Management (JPA)

To expand CO₂ sinks, the Japan Paper Association (JPA) raised its target to increase carbon sinks by 650,000 hectares by FY2030, reflecting a 375,000-hectare rise from FY1990. This is part of the Carbon Neutrality Action Plan.

Efforts include promoting sustainable forest management, such as selecting optimal tree species, breeding high-growth seedlings, and applying fertilizers effectively. These initiatives led to an afforested area increase of 264,000 hectares by FY2024—equivalent to about 369,000 soccer fields.

Recognizing biodiversity's importance in the pulp and paper industry, JPA established the "Action Guidelines on the Preservation of Biodiversity" in 2014, revising them in January 2024. The guidelines cover 22 items across five areas, including sustainable forest management and responsible raw material procurement. Since FY2014, follow-up surveys show 85% of JPA members now incorporate biodiversity preservation into their management plans.

JPA also combats illegal logging and wood trade, formulating the "Code of Conduct" in 2006 and a Due Diligence Manual in 2017. These measures ensure that no illegally logged wood is used for pulp and paper production in Japan.



Case Study: Swedish Forest Industries' Road to the Future (SFIF)

In 2023, the Swedish Forest Industries Federation (SFIF) launched three pledges for 2040, when the next generation reaches adulthood. Together, they outline how the Swedish forest sector can contribute to a more sustainable future:

The forest industry's **climate benefit shall increase by 30%** by 2040 through greater carbon sequestration, increased substitution and the phase-out of fossil emissions.

All wood-based forest industry products shall be **fossil-free and recyclable** by 2040.

By 2040, Swedish forests are **flourishing and rich in biodiversity**.

To deliver on the biodiversity pledge, the sector is focusing on more varied forestry, increased conservation management, and stronger research and measurement methods.



The action plan translates the biodiversity pledge into practical commitments. Members are working to protect forests with the highest conservation values, expand alternative forest management methods and increase active conservation measures such as prescribed burning and peatland rewetting. They are also investing in better biodiversity monitoring, including landscape-scale assessments, species tracking, harmonized methods for evaluating

environmental consideration in managed forests, and research with partners including the Swedish University of Agricultural Sciences and the Swedish Forest Agency. Members also make forests and experimental sites available for practical trials.

The action plan is reviewed and followed up every three years.

Examples of active conservation management by members

SCA has designated five biodiversity parks across northern Sweden. In these large landscapes, covering several thousand hectares, at least half the area is managed to protect and enhance natural and cultural values. Measures include prescribed burning in sandy pine forests to benefit uncommon fungal species and conservation-oriented harvesting to promote open, sunlit broadleaved forests.

Holmen has carried out eight prescribed conservation burnings over 20 years in Västerbotten, covering 180 hectares. Repeated burnings have strengthened populations of fire-dependent species and enabled new fire-specialist species to establish. Holmen also restores wetlands and creates more structurally diverse forest landscapes, carrying out conservation management on about 400 hectares each year.

Södra, a forest owners' association in southern Sweden, represents members whose holdings include a wide range of habitat types. Many conservation values depend on active management and stewardship. On average, Södra's certified members voluntarily set aside 8% of their forest land for conservation.

Stora Enso collaborates with public authorities and local stakeholders to restore a watercourse used by sea trout migrating from the Bothnian Sea. In 2021 and 2022, seven river sections covering six kilometres were restored by reopening side channels, returning boulders to the watercourse and recreating spawning habitats. These actions also support the freshwater pearl mussel, whose larvae depend on trout as a host.

Recovered Fibre

Paper and paperboard are among the most widely recycled materials in the world, making recovered fibre a critical input to the paper manufacturing sector and a cornerstone of the circular bio-based economy. Recycling extends the useful life of forest fibre, supports efficient resource use and enables continued carbon storage across multiple product life cycles.

ICFPA tracks progress using the global recycling rate, defined as the amount of recovered paper used by paper and paperboard mills as a percentage of global paper and paperboard consumption. This approach provides a consistent, internationally comparable indicator, recognising that national definitions and methodologies for recycling and recovery vary widely.

Based on FAO data, the countries represented by **ICFPA members account for more than 90% of global paper and paperboard production**, making the global recycling rate a robust proxy for industry-wide performance.

In 2023, the global recycling rate reached 61.6%, continuing a long-term upward trend that has more than doubled recovered fibre utilisation since 2000.

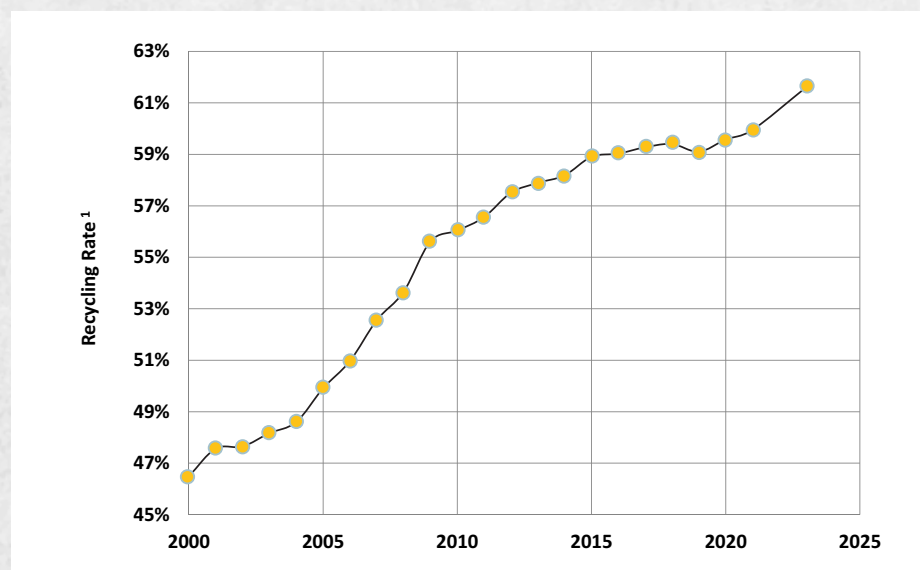
While growth has moderated in recent years, recycling rates in regions with mature collection systems remain significantly higher than the global average. Europe and North America continue to report consistently high recycling performance, reflecting decades of investment in infrastructure, public participation and market development.

Structural factors limit the extent to which global recycling rates can increase indefinitely. It is estimated that approximately 22% of paper consumption cannot be collected or recycled, including hygiene products such as tissue. In addition, changing consumption patterns, evolving product designs, global supply chain disruptions and the growing diversity of paper-based applications introduce new technical and logistical challenges for collection and processing.

In response, the forest products industry is investing billions of dollars globally to modernise recycling infrastructure, improve fibre quality and capture

material from harder-to-recycle paper products. At the same time, innovation in paper-based solutions is enabling brands and customers to meet evolving environmental, social and governance expectations, while responding to sustained consumer demand for renewable, recyclable and low-carbon packaging and paper products.

Global Recycling Rate



¹ Recycling Rate is defined as recovered paper used by paper and paperboard mills divided by paper and paperboard production.

Manufacturing & Energy Performance

Forests and forest-based products play an important role in supporting a resource-efficient, low-emissions economy. Trees absorb carbon dioxide from the atmosphere, storing carbon in forest ecosystems and in long-lived products, while sustainably managed forests provide renewable raw materials that can substitute for more emissions-intensive alternatives. Alongside these inherent characteristics, the forest products industry continues to improve the emissions and energy performance of its manufacturing operations.

ICFPA members track progress using greenhouse gas (GHG) emission intensity, covering combined Scope 1 and Scope 2 emissions per unit of production. In the most recent reporting cycle, GHG emission intensity declined to 0.489 mt CO₂e per tonne of production, representing a **29.1% reduction in combined Scope 1 and Scope 2 emission intensity** compared to the 2004/2005 baseline. Since the previous reporting cycle, combined emission intensity decreased by 7.3%, reflecting continued progress across a diverse global operating base.

Reductions in Scope 1 emissions have been driven by sustained investment in energy efficiency, switching away from higher-emissions fossil fuels and the retirement of less energy-efficient assets. Improvements in Scope 2 emissions largely reflect the ongoing decarbonisation of electricity grids in regions where member facilities operate, alongside optimisation of on-site energy systems.

The sector's energy profile continues to shift towards renewable and low-carbon sources.

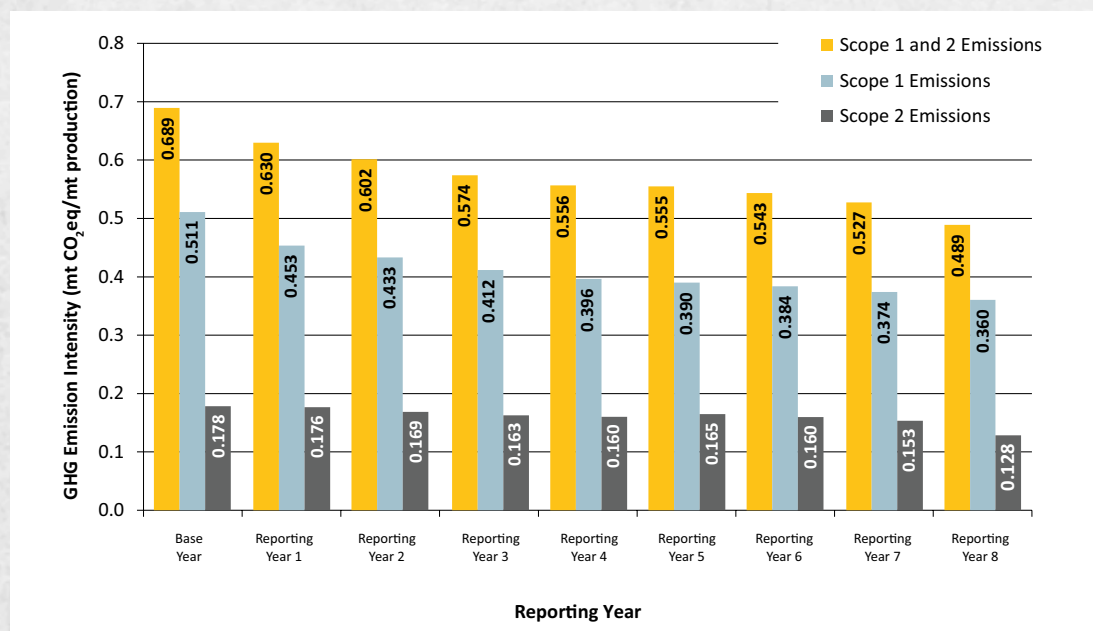
Biomass and other renewable fuels now account for **65.8% of on-site energy use**, an increase of 12.8 percentage points from the baseline period. These fuels include process by-products such as spent pulping liquors and wood residues, enabling efficient use of materials that would otherwise be treated as waste, while supporting energy security at the facility level.

Total on-site energy intensity has remained broadly stable over time, reflecting efficiency gains offset by changes in product mix, operating conditions and technology deployment. In parallel, ICFPA

members have achieved substantial reductions in sulphur dioxide emissions from on-site combustion sources, driven by reduced use of high-sulphur fuels and the widespread adoption of emission control technologies.

Together, these trends demonstrate the industry's continued focus on improving emissions performance through operational efficiency, energy transition and technology investment, while maintaining reliable production of essential forest-based products.

GHG Emission Intensity Reduction



Case Study: Converting Paper Waste into Bioethanol (PAMSA)

The Paper and Allied Manufacturers of South Africa (PAMSA), in collaboration with Stellenbosch University (SU), Sappi Southern Africa and Mpact, is piloting a pioneering process to convert cellulose fibre-rich waste from paper mill operations into ethanol through specialised fermentation.



Paper sludge, a high-moisture by-product from paper production, can now be transformed into ethanol, a valuable raw material for bio-based chemicals, plastics and sustainable aviation fuel. A demonstration plant, co-funded by the Department of Science and Innovation and PAMSA, was launched at Sappi's



Tugela mill in April 2024 to test the technology under industrial conditions.

This South African first started as a Master's research project and is a culmination of 10 years of research by the Bioresource Engineering group at the SU Department of Chemical Engineering where they have explored various beneficiation routes to create application for this by-product of pulp, paper making and recycling processes.

The research has shown that paper, food and textile waste can be fermented to ethanol without pre-treatment, reducing landfill disposal, greenhouse gas emissions and water use. The containerised plant processes approximately 100 kg of paper sludge per day, further trials will be done with fibre from the sugar industry.



Case Study: Japanese Pulp and Paper Industry Has Made Good Progress Towards Carbon Neutrality in Accordance with the JPA's Long-Term Vision 2050 (JPA)

In January 2021, the Japan Paper Association (JPA) established its “Long-Term Vision 2050” aiming for net zero greenhouse gas emissions from paper industry production by 2050. To advance this goal, JPA raised its interim CO₂ reduction target for 2030 from 21% to 38% (base year FY2013) in April 2022.

The Japanese pulp and paper industry is pursuing carbon neutrality by 2050 through actions such as:

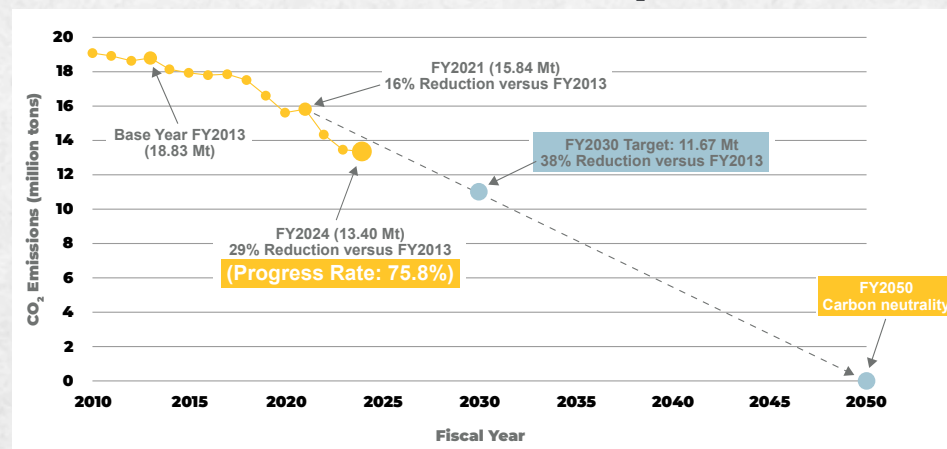
- Promoting energy conservation via best available energy-efficient technologies,
- Increasing the use of renewable energy in in-house power generation,
- Developing innovative paper manufacturing technologies, and
- Actively adopting energy-related innovations.

Through these measures, JPA members reduced energy-derived CO₂ emissions by 29% in FY2024 versus FY2013 (75.8% progress toward the 2030 target).

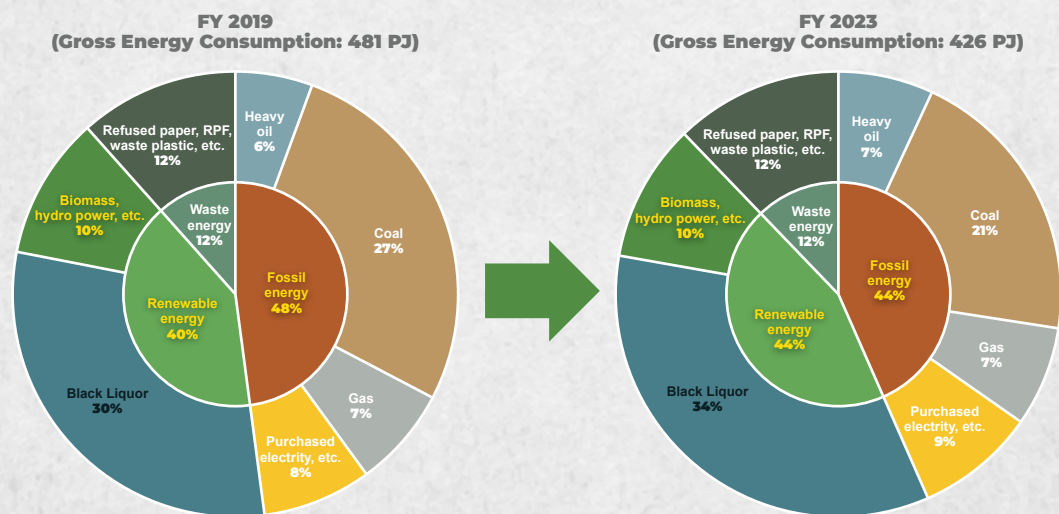
Total energy consumption fell by 11% from FY2019 to FY2023, and the share of fossil fuels like coal declined as renewable and non-fossil energy increased in-house generation.

Additionally, the industry is advancing CCS (Carbon Capture and Storage) and CCUS (Carbon Capture, Utilization, and Storage) technologies, including public-private trials at Oji Holdings, Nippon Paper Industries, and Hokuetsu, to further support net zero ambitions by 2050.

Progress in Energy-Derived CO₂ Reduction



Energy Composition of Paper Industry in Japan



RPF (Refuse Paper and Plastic Fuel): A high-quality solid alternative fuel manufactured by compressing and molding unrecyclable wastepaper and plastic industrial waste.

Sustainable Water Management

Water is a vital resource for the forest products sector, essential both for growing forests and for many manufacturing processes. As a result, sustainable water management remains a core priority for ICFPA members and a key element of responsible environmental stewardship. Well-managed forests also provide critical water-related ecosystem services for society. An estimated **three-quarters of the world's accessible freshwater originates in forested watersheds**, highlighting the interdependence between forest management and water security.

Forests and trees play an important role in regulating the global water cycle by intercepting precipitation, reducing erosion, supporting groundwater recharge and contributing to the provision of high-quality water resources. Within manufacturing operations, although the forest products industry is among the larger industrial users of process water, the majority of water withdrawn is treated and returned to surface waters or public treatment systems in accordance with regulatory requirements.

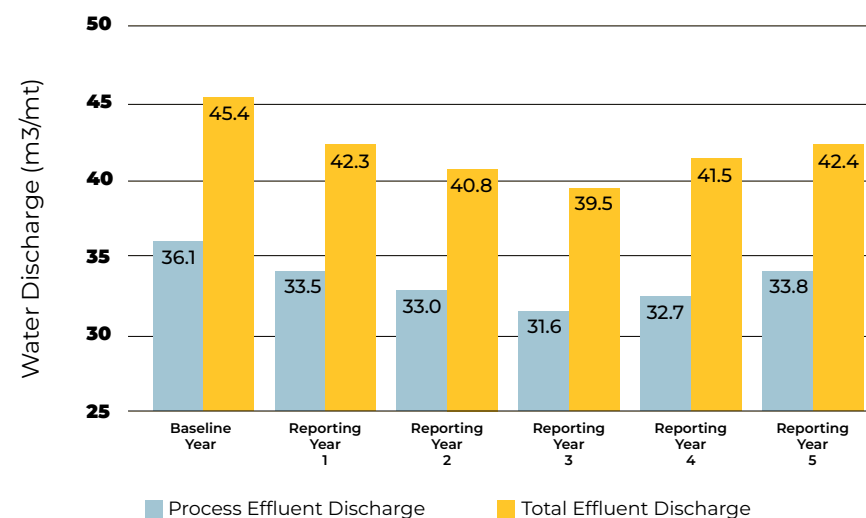
ICFPA members track performance on water stewardship using water discharge intensity, measured as water discharged per unit of production. Data are collected for both process water and non-contact cooling water, providing a consistent basis for assessing trends over time across regions and operating conditions. In the current reporting cycle, data were submitted by member associations representing approximately 175 million metric tonnes of production across 24 countries.

Since the baseline period in the mid-2000s, total water discharge intensity has declined by 6.5%,

reflecting long-term efficiency improvements and sustained investment in water management. However, recent reporting cycles show a modest increase in both process water discharge intensity and total water discharge intensity. These trends underscore the influence of site-specific factors, product mix, climate conditions and operational changes, and reinforce the importance of continued focus on efficiency, innovation and risk-based water management.

ICFPA members remain committed to reducing water-related impacts through ongoing investment in advanced treatment technologies, process optimisation and site-level water stewardship, particularly in regions facing increased water stress. By combining responsible forest management with efficient industrial water use, the sector seeks to support resilient operations while contributing to the protection of shared water resources.

Water Discharge Intensity



Process Water: Water used for process purposes, and then either treated on site and discharged to a surface water or discharged to a Publicly-Owned Treatment Works (POTW) for treatment and discharge.

Non-Contact Cooling Water: Water used only for cooling purposes and then discharged to surface water either through a separate non-contact cooling water discharge or in combination with treated process water after the cooling water has bypassed the treatment plan.

Case Study: Making a Splash with Water Conservation (AF&PA)

To accelerate progress toward its goal of reducing water use by 20% per unit of product by 2030, Domtar launched a dedicated Water Reduction Fund that prioritized water savings over financial return. The initiative challenged mills to identify innovative conservation projects and sparked healthy competition across the company. In 2023, seven mills completed 10 projects that collectively save approximately 1.06 billion gallons of water annually, reducing Domtar's overall water use by 1.4%. The program demonstrates how dedicated investment and employee-driven innovation can deliver measurable environmental results at scale.



Case Study: Generating Clean Energy from Treated Wastewater (Ibá)

Eldorado Brasil developed an innovative system that generates renewable electricity from treated wastewater at its Três Lagoas mill before the water is returned to the Paraná River. Developed in partnership with the Federal University of Itajubá, the technology uses pumps functioning as turbines to capture energy from the mill's treated effluent stream. Operating up to 8,400 hours annually, the system generates approximately 1,545 MWh of electricity each year, supplying the mill's administrative facilities. The project demonstrates how innovative wastewater management can advance circular economy principles while delivering environmental and operational benefits.

Carbon Sequestration and Long-Term Storage

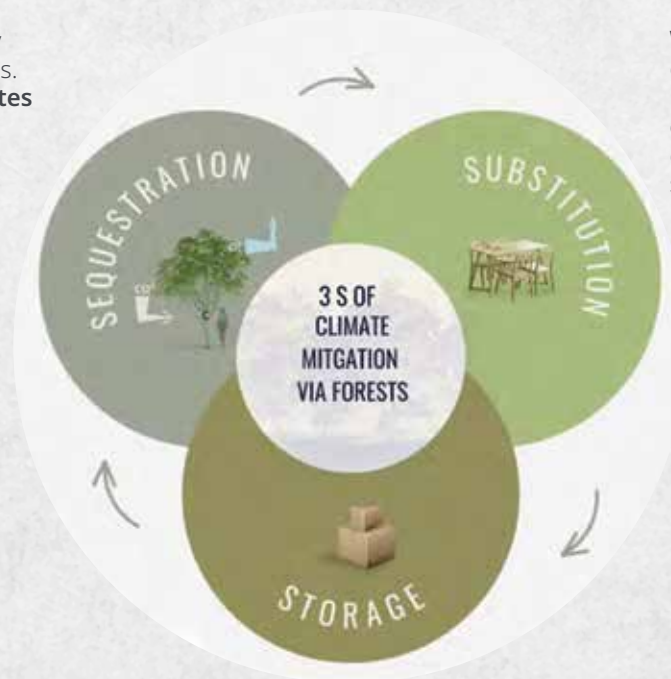
Forests and forest-based products play a distinctive role in the global carbon cycle. Through photosynthesis, trees absorb CO₂ from the atmosphere and store it in their trunks, branches, roots and surrounding soils. This natural process — known as carbon sequestration — simply means capturing carbon from the air and locking it away in stable forms. Even after trees are harvested, the carbon remains stored in wood products such as buildings, furniture and paper for years, sometimes decades, extending the climate benefit beyond the forest itself.

When forests are sustainably managed, this cycle supports continuous carbon uptake, long-term storage and the supply of renewable materials.

ICFPA members support SFM practices that maintain forest cover, promote regeneration and enhance forest productivity over time. These practices underpin ongoing carbon sequestration in forests, while enabling the production of wood, pulp and paper products that store carbon and can displace more emissions-intensive materials in many applications.

Across the value chain, improvements in manufacturing efficiency and increased use of renewable bioenergy further reinforce the climate benefits of forest-based products. Together, carbon sequestration in forests, storage in products and efficient manufacturing contribute to a balanced, science-based approach to managing carbon across forest product systems.

Trees **sequester** CO₂ as they grow through photosynthesis. This **carbon** then **accumulates** in the form of biomass, deadwood, litter and forest soils.



Wood products can replace environmentally damaging products thus **reducing emissions** found in construction elements, textiles, energy services etc.

Wood products form a storage pool of wood-based carbon. Harvested Wood Products (**HWP**s) are used for energy and products like furniture, paper and plywood.

3S of Framework (Sequestration, Storage, and Substitution) that highlights the role of wood products in the carbon cycle and ultimately their contribution to climate mitigation (Dalberg, 2022).

Case Study: Cambrian Heights Warehouse Building (FPAC)

The Cambrian Heights industrial warehouse in Sudbury, Ontario, Canada, marks a pivotal shift toward low carbon construction. Originally designed as a steel structure, the project transitioned to mass timber when pandemic era steel costs and delays made traditional approaches unworkable. Bloomington Developments embraced the opportunity to build a flexible, modern facility using a renewable material that significantly reduces embodied carbon. The two-story post and beam building offers adaptable industrial and office space while showcasing the warmth and visual impact of exposed timber. Mass timber proved cost competitive and delivered meaningful sustainability gains—storing over a thousand tonnes of CO₂ and avoiding emissions associated with steel manufacturing. Cambrian Heights demonstrates how thoughtful design and material choices can support tenant demand for greener, high performance industrial spaces while setting a new benchmark for sustainable development.

CAMBRIAN HEIGHTS INDUSTRIAL	
 Volume of wood products used:	925 cubic meters
 U.S. and Canadian forests grow this much wood in:	3 minutes
 Carbon stored in wood:	1135 metric tons of carbon dioxide
Equivalent to:	
 240 cars off the road for a year	
 Energy to operate 120 homes for a year	



Case Study: Proposal for Forest Financing with Carbon Credits (CORMA)

During 2024 and 2025, CORMA, in partnership with Chilean ministries, is advancing an innovative green financing model for afforestation and reforestation projects owned by small and medium-sized landholders. The program targets a minimum of 8,000 hectares, restoring soils with a mix such as 40% pine, 40% eucalyptus, and 20% native species.

A key feature is the integration of revenues from carbon credits alongside traditional timber sales, creating new income streams and incentivizing climate-positive practices. The financial model, refined with input from forestry, financial, and carbon market stakeholders, ensures project viability and benefits for all participants. Current efforts include evaluating land suitability, identifying landholders, and developing methodologies to certify carbon captured by new forests—an essential step for accessing credible carbon markets.

By supporting economic development, soil recovery, and climate mitigation, this initiative is poised to set a milestone in green financing and sustainable forestry in Chile, providing a replicable framework for other regions.



Biodiversity

According to the World Economic Forum, biodiversity loss and ecosystem collapse is one of the top five risks facing world economies.

Biological diversity, or biodiversity, is the diversity within species, between species and of ecosystems. It is essential for all processes that support life on the planet, including the very beings that have caused more than 83% of habitat loss. This decline is exacerbated by climate change altering weather patterns faster than ecosystems and species can evolve to match them.

Biodiversity is fundamental to the health, resilience and productivity of forests that supply the global forest products industry. Healthy, well-managed forests support a wide range of species and habitats, while providing essential ecosystem services that underpin long-term forest growth and regeneration.



Publication of Field Guide to Chilean Violas 2025 (CORMA)

CORMA has advanced Chilean biodiversity knowledge for nearly twenty years through its Field Guides. The 2025 Field Guide to Chilean Violas is the nineteenth in the series, featuring taxonomic descriptions of 76 local Viola species—60 illustrated with field photos and 16 with herbarium specimens. The guide highlights the diversity and resilience of these plants, many of which thrive in challenging mountain and forest habitats. It honors botanist John Watson's contributions and is the product of collaboration across scientific, conservation, and forestry groups. This publication encourages greater appreciation and protection of Chile's unique native flora.



Case Study: Measuring What Matters - South Africa's Biodiversity Reporting Tool (PAMSA)

In South Africa, the Paper and Allied Manufacturers of South Africa (PAMSA) has developed a **Biodiversity Reporting Tool** to help companies move from intent to measurable action.

This was borne out of the need to accelerate biodiversity reporting under Target 15 of the Global Biodiversity Framework (GBF).

Designed to address the complexity of biodiversity, the tool enables companies to **identify, quantify and prioritise** their impacts and dependencies at a **site-specific level**. Crucially, it goes beyond risk by also measuring **positive contributions such as conservation efforts and habitat management**.

The tool aims to deliver three key outcomes:

- **Credible, quantified insights:** Biodiversity dependencies, impacts and contributions are measured and ranked, enabling clearer decision-making.
- **Actionable performance management:** Companies can set targets, track progress and prioritise interventions where they matter most.
- **Aligned global reporting:** Outputs are compatible with leading frameworks including TNFD, GRI and IFRS, reducing reporting complexity and improving transparency.

Currently being piloted in forestry plantations, the tool is already supporting more consistent biodiversity assessments across operations. Early results are helping companies better understand the relationship between production landscapes and ecological value, strengthening their stewardship practices.

The next phase will extend the tool across the value chain, starting with pulp and paper manufacturing, enabling a more integrated view of biodiversity performance from plantation to product.



Case Study: Protecting New Zealand's Powelliphanta Snails (NZFOA)

OneFortyOne New Zealand is leading a collaborative conservation initiative to protect one of New Zealand's most threatened native land snails (*Powelliphanta hochstetteri consobrina*), within its Rai Forest estate at the top of New Zealand's South Island. The project is being delivered in partnership with Ngāti Tama (Māori landowner), and the New Zealand Department of Conservation (DOC).

Found only in New Zealand, Powelliphanta are among the world's largest carnivorous land snails and play an important role in forest ecosystems. The species is classified as Nationally Critical and faces ongoing threats from introduced mammals such as pigs, rats, goats and possums, as well as habitat degradation and climate change.

Following the discovery of live snails and shells within production forest areas, OneFortyOne established a predator-exclusion fenced sanctuary and developed a long-term management programme that integrates conservation into forest operations. Measures include staff and contractor discovery protocols, habitat protection, monitoring plots and the relocation of live



Forest Stories: Powelliphanta Sanctuary

snails found during forestry activities into the protected sanctuary by trained OneFortyOne staff under DOC delegated authority.

In 2026, the first monitoring survey confirmed live Powelliphanta snails

remain present within the sanctuary, providing an important baseline for future monitoring and demonstrating the value of collaborative, science-based conservation within productive forest landscapes.

Workforce Safety

Protecting the health and safety of workers remains the highest priority for the global forest products industry. ICFPA members operate in diverse environments and are committed to preventing injuries and fatalities through robust safety management systems, risk assessment, training and continuous improvement, with the long-term objective of zero workplace injuries.

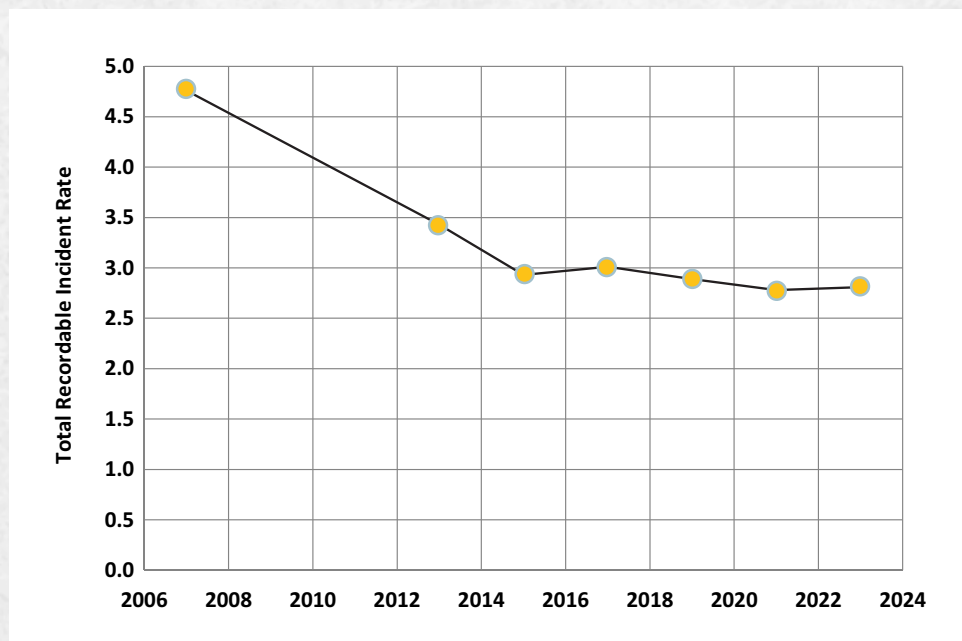
Progress is tracked using the recordable incident rate, defined as the number of recordable incidents multiplied by 200,000 hours and divided by the total hours worked. In the most recent reporting cycle,

The global recordable incident rate for ICFPA members was 2.81, representing a -31.6% reduction

compared to the baseline period. While performance has remained broadly stable in recent years, sustained focus on safety culture, leadership engagement and operational discipline remains essential.

The industry's commitment to safety is inseparable from its reliance on a skilled, capable workforce and the communities in which it operates. The forest products industry makes a significant contribution to economic activity and employment worldwide. The sector supports **tens of millions of jobs** across forestry, manufacturing, logistics and related services, including in rural and forest-dependent regions where employment opportunities may be limited.

ICFPA Member Total Recordable Incident Rate



Through direct operations and extended value chains, the industry contributes substantially to national and regional economies. ICFPA members also play an important role in supporting local communities by providing stable employment, investing in skills development and training, and contributing to local infrastructure and services. Ongoing investment in workforce capability helps ensure that employees are equipped to operate safely, adapt to evolving technologies and maintain high standards of operational performance.

Together, a strong focus on workplace safety, skills development and community engagement underpins the industry's social contribution and supports resilient operations across the regions in which ICFPA members operate.

Blue Sky Awards

The Blue Sky Young Awards program is an ICFPA initiative that helps recognize and promote young researchers and professionals who are driving innovation and advancing positive change in the field of forestry, harvested wood products, forest products innovation and manufacturing or other innovations throughout the forest sector value chain.

The awards program, in its 5th edition, features two categories:

- **Young Researchers Innovation Award**, recognizing outstanding students and researchers age 30 and younger.
- **Young Professionals Innovation Award**, recognizing outstanding projects from professionals and academics age 35 and younger.

These young researchers carry out projects relevant to forest-based science, products using forest-based raw materials, process improvements or other innovations throughout the value chain. The award focuses on the quality of research and development, as well as the project's innovation and industry potential.

The theme for the 2024-2025 Blue Sky Young Researchers and Innovation Award was "Time for forest-based sector showcase its innovative solutions for forest products, wood bioindustry, and forest conservation, management, and restoration." The winners presented their projects to industry leaders at the ICFPA's 2025 International CEO Roundtable in New York City, United States.



Left to right:

Ambassador José Carlos da Fonseca Jr. (Ibá), ICFPA President and **Heidi Brock (AF&PA)**, ICFPA Immediate Past President with **François Bru**, **Titta Kiiskinen**, **Sandro Zier** and **Aysan Najd Mazhar**.

On screen:

Brendon de Raad (top) and **Penghui Zhu** (bottom).

Blue Sky Young Researchers Innovation Award

Penghui Zhu



Nominated by:
Forest Products
Association of Canada
(FPAC)

Research subject:
Stretchable Yet
Mechanically Strong
All-Cellulose Film:
A Sustainable
Alternative to Plastics

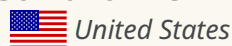
Titta Kiiskinen



Nominated by:
Confederation of
European Paper
Industries (Cepi)

Research subject:
Air Filtering – With
Sustainable Materials

Sandro Zier



Nominated by:
American Forest &
Paper Association
(AF&PA)

Research subject:
Vacuum assisted
coating of cellulose
nanofibers onto
paper to replace
single-use plastic
food packaging

Blue Sky Young Professionals Innovation Award

Aysan Najd
Mazhar



Nominated by
American Forest &
Paper Association
(AF&PA)

Research subject:
Sustainable Molded-
Pulp Packaging from
Hot-Water Extracted
Restoration Wood

François Bru



Nominated by:
Confederation of
European Paper
Industries (Cepi)

Research subject:
All cellulose barrier
material for the
development of
recyclable and
biodegradable food
packaging solution

Brendon de
Raad



Nominated by:
Confederation of
European Paper
Industries (Cepi)

Research subject:
Towards a Sustainable
Dutch Paper Industry:
The Application of
Heat Pumps

ICFPA Members

Brazilian Tree Industry (Ibá)

 Sao Paulo, Brazil

Forest Products Association of Canada (FPAC)

 Ottawa, Ontario, Canada

Corporacion Chilena de la Madera (CORMA)

 Santiago, Chile

Confederation of European Paper Industries (Cepi)

 Brussels, Belgium

Finnish Forest Industries Federation (FFIF)

 Helsinki, Finland

Confederation de l'Industrie Francaise des Papiers Cartons et Celluloses (COPACEL),

 Paris, France

Die Papierindustrie e. V.

 Bonn, Germany

Japan Paper Association (JPA)

 Tokyo, Japan

New Zealand Forest Owners Association (NZFOA)

 Wellington, New Zealand

Biond: Associação das Bioindústrias de Base Florestal

 Lisbon, Portugal

Paper and Allied Manufacturers of South Africa (PAMSA)

 Johannesburg, South Africa

Asociación Nacional de Fabricantes de Pastas, Papel y Cartón (ASPAPEL)

 Madrid, Spain

Swedish Forest Industries Federation (SFIF)

 Stockholm, Sweden

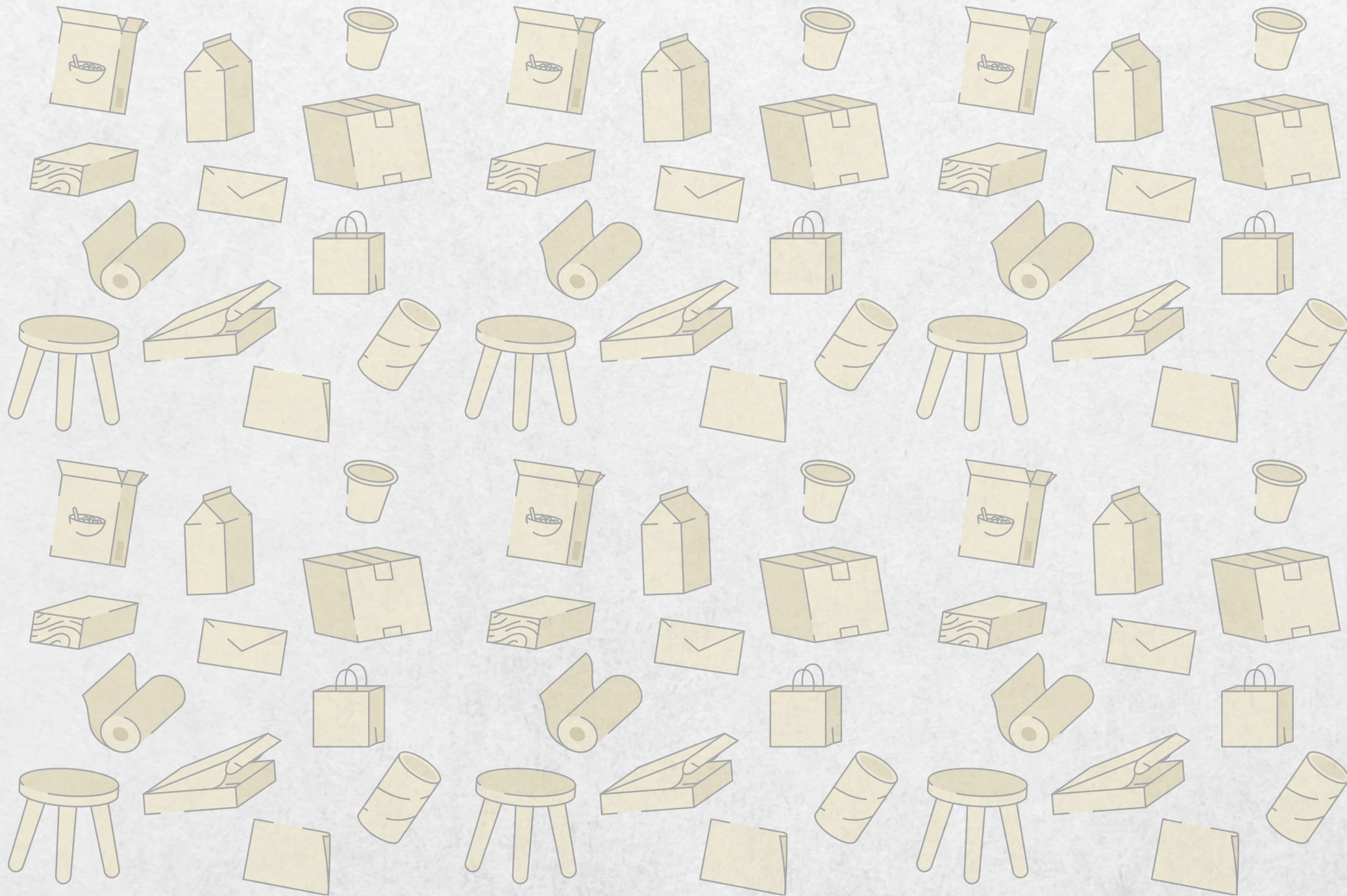
American Forest & Paper Association (AF&PA)

 Washington, D.C., U.S.A

Confederation of Paper Industries (CPI)

 Swindon, Wiltshire, UK







ICFPA.org