

Reflections about our Environmental Behavior



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Please, allow me some reflections...

“People, who plant forests, believe in the future”

Past



Present



Future

?



“People, who build competitive mills, deserve to play the best markets”



Today's technology is definitively better and more environmentally sustainable than yesterday's



Tomorrow's technology will be much better and sustainable than today's



Tomorrow, our vision about our industry and its relationships
will be different
in relation to what
we believe and trust today





Tomorrow, our concept about sustainability will be different





We are good, but no so wonderful as we believe in our proudish self-evaluations



In a controversy dispute, the truth is, in most of the cases, located somewhere in between the two extreme positions



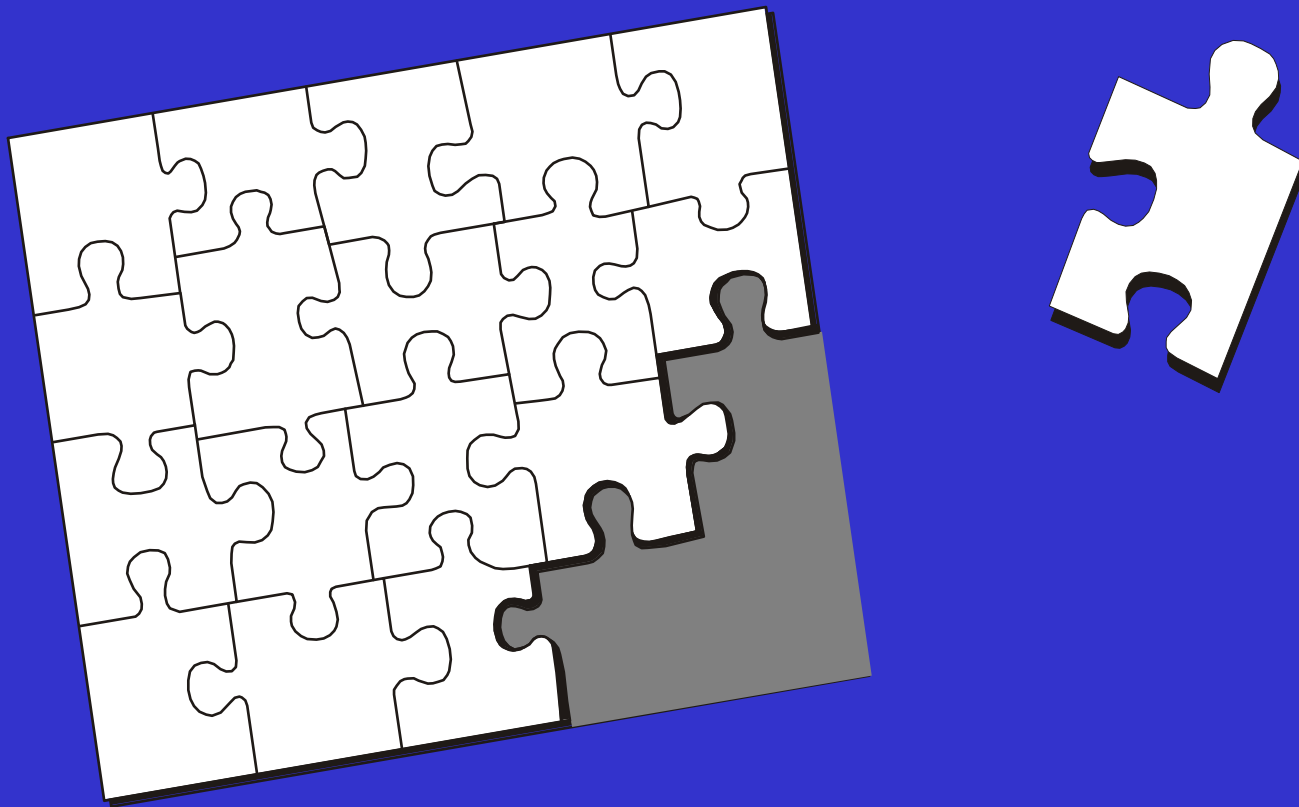
“The truth is not absolute. What is good today, may not be good tomorrow”



We are competitive, efficient, skilled, keen and clever.

Is this enough? Surely not...

But, what is enough in this game?



What are we searching for now?

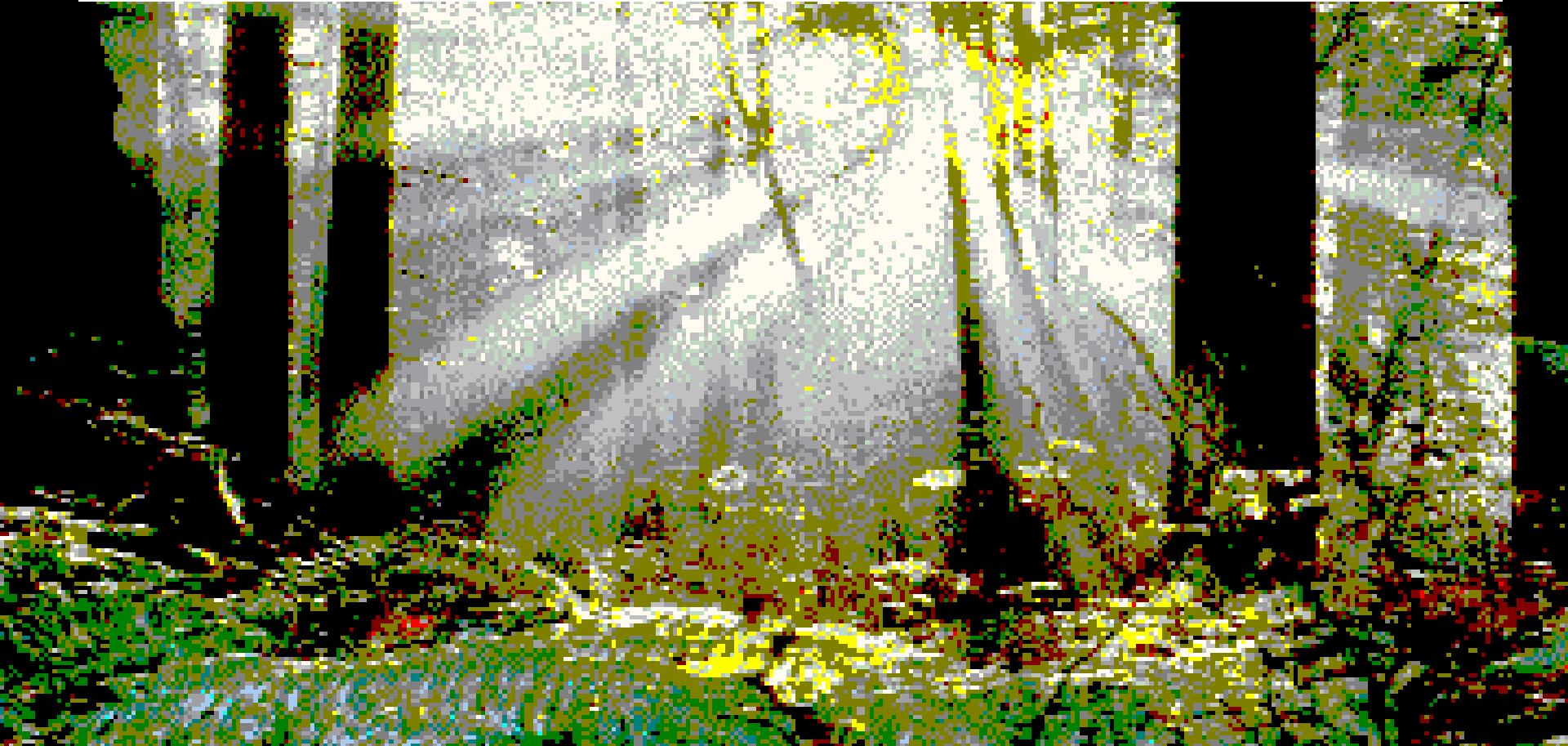


**The Future, the competitive and Sustainable Future
to the forest based industry in Latin America.
Is it far away?**

More Reflections: The Good, the Bad and the Ugly



THE GOOD



Forestry sector is growing fast and there is enormous room for further growth in Latin America

Forest and Wood Certification



ISO 9001 e ISO 14001

Good Forest Management (FSC & CERFLOR)



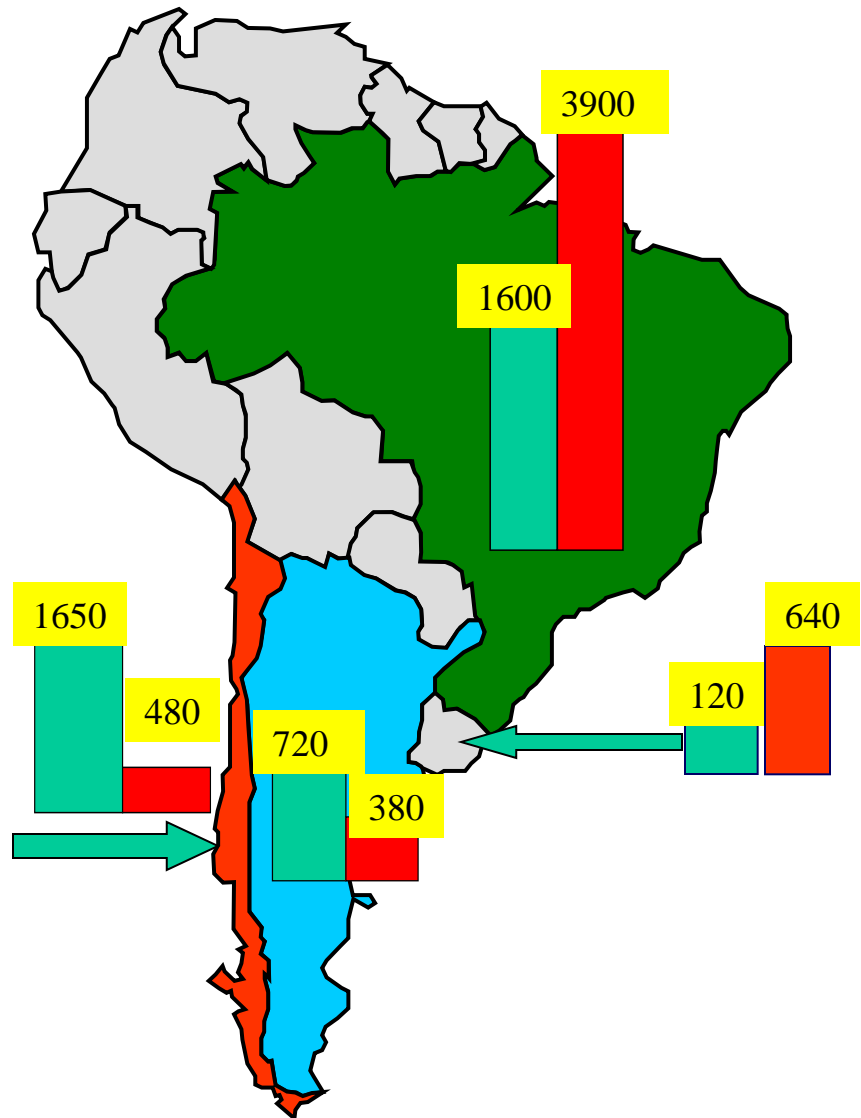
ABC & U plantation areas

In thousand hectares

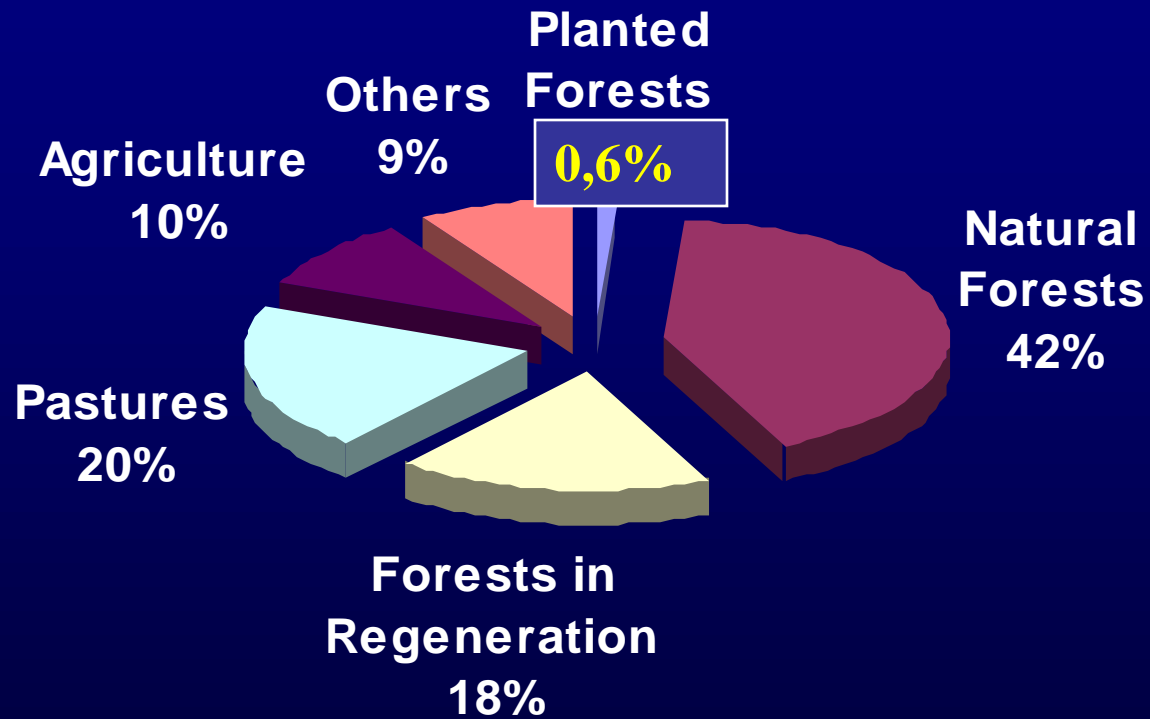
Total: 9,490 ha

Softwoods (green): 4,090 ha

Hardwoods (red): 5,400 ha

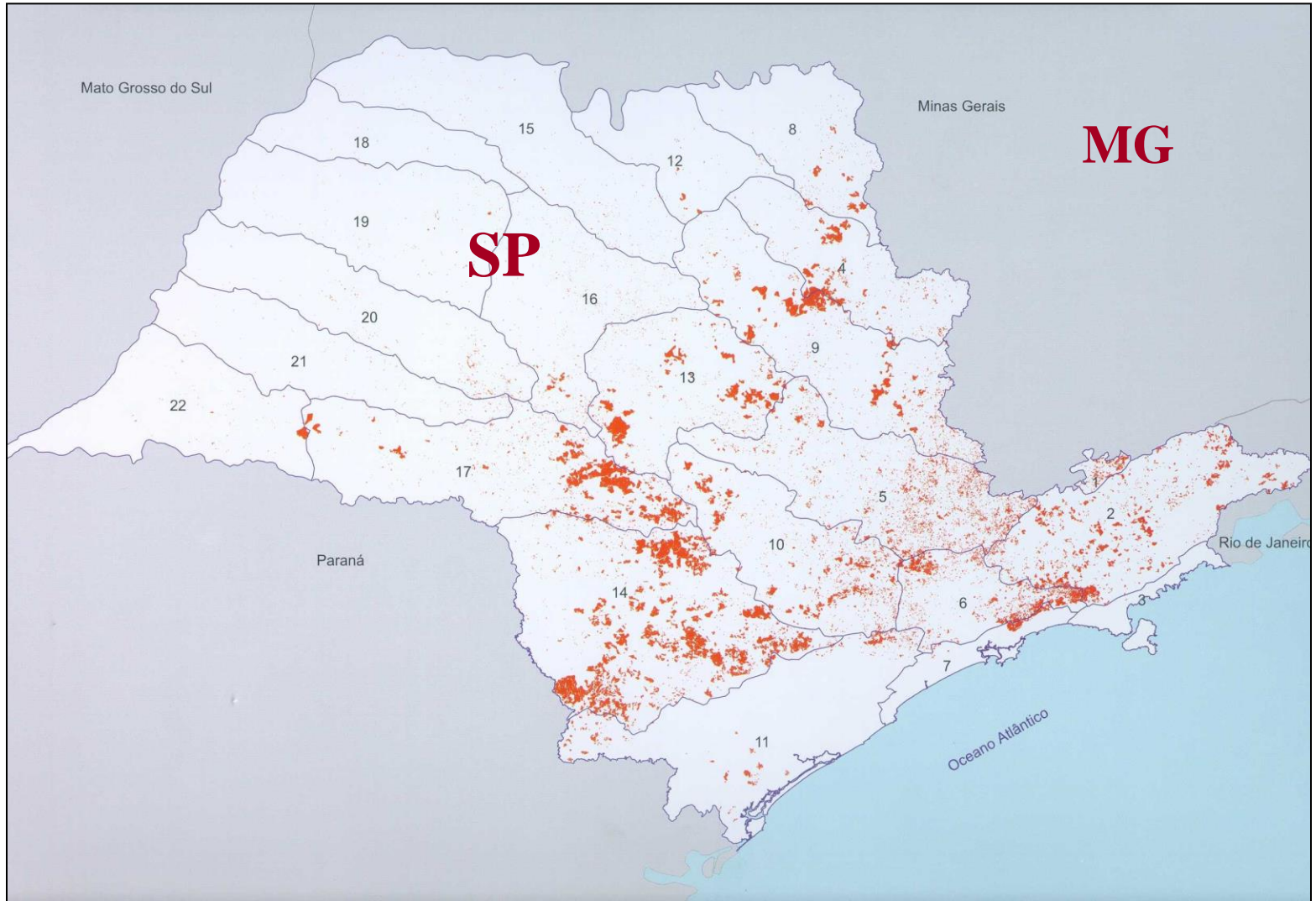


Soil utilization in Brazil



% of Sao Paulo State covered by plantations: 3.1%

Minas Gerais State: the largest planter of forests in Brazil: 1.7 million hectares (2.9% of state land)



% of Uruguayan land covered by plantations: 4.5%



Social Silviculture is coming, sharing the results with communities (rural owners and agroforestry)

Next forest growth is to happen more in partnership with society.



The Bad and the Ugly



**“Lack of dialogue
(among the interested
parties)
and emotional behavior”**



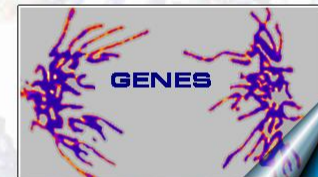
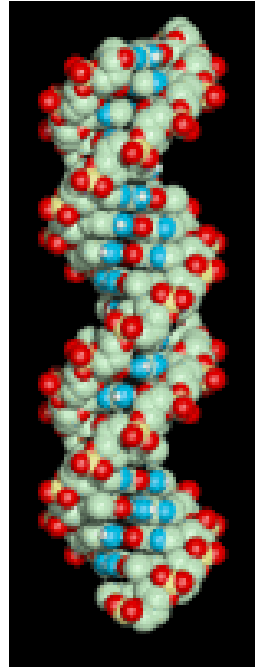
The Bad and the Ugly

“Lack of good will (from the interested parties) to find common ground in search of sustainability (economic growth, environmental care and social justice)”



The Bad and the Ugly

“Lack of good will (from the interested parties) to find common ground in search of sustainability (economic growth, environmental care and social justice)”



Genética Quantitativa e Estatística Experimental - VS

We humans, we have the ability to change the landscape

From the worse...



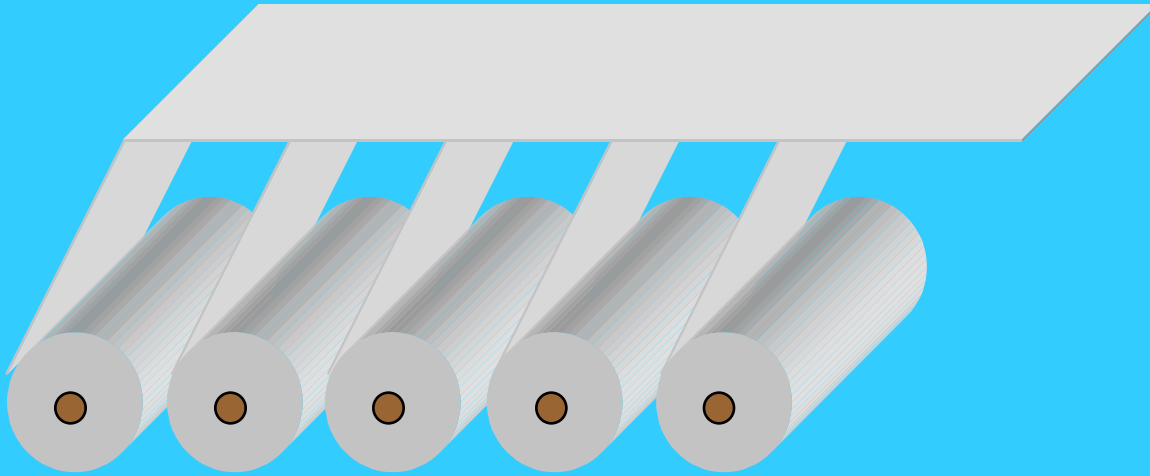
To the better...



And vice-versa...



What are our strengths today (and weaknesses, too) ???



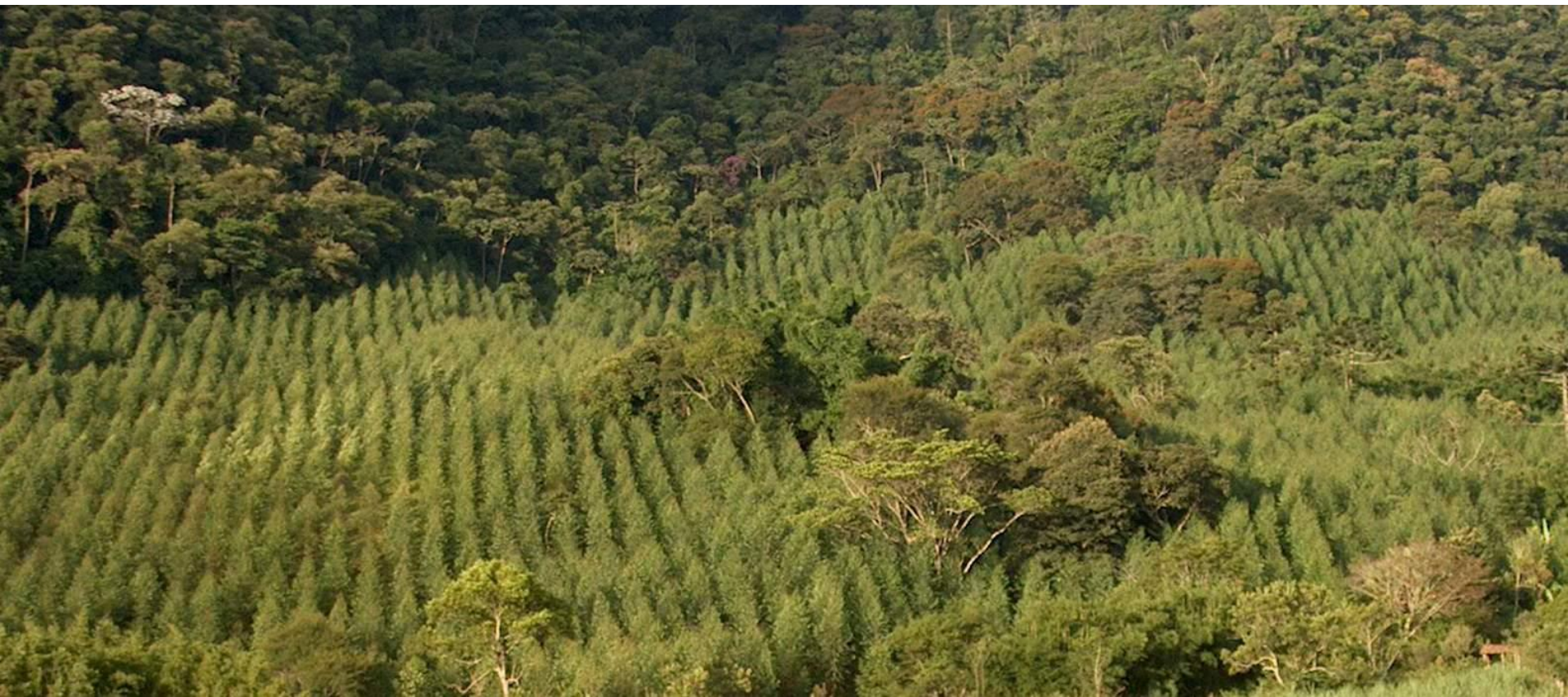


**Unexpensive and good quality
wood**



Extreme good will to put sustainability into practice, but some presumptuous and selfish behaviour may however be noticed ...

And a very poor communication process....



The Future



Trends



☐ **Wood price in Latin America will increase due to the additional environmental and social needs, both as legislation requirements and own awareness of companies.**

☐ **Latin America will continue very competitive, despite these new costs. Efficiency is to improve.**



Trends



- ☐ Social issues are to play fundamental role in the years to come.



One of the issues to be remembered



☰ "Today's measurements of competitiveness are not only based on economical growth and production costs.





We need to learn more, a lot more, with Nature about what we have to do in order to be minimum impact



Where may we grow the additional fiber supply from now onwards ?



- ☐ **New plantations, with intense participation of third parties. A new model of plantations will be developed.**
- ☐ **Increased forest yield in the same land (In Brazilian researches, Eucalyptus could grow 80 m³/ha.year with fertilization and irrigation).**
- ☐ **Better utilization of the wood (eco-efficiency).**
- ☐ **Increased process yield and reduced wood specific consumption through tree breeding, technological development and operational measures.**

One of the issues to be always searched



☰ "It is always possible to do anything better than we are doing now."



The coming sustainable technological model



- ☐ Focus on landscape management...
- ☐ Focus on monitoring the ecosystems, placing the micro-watersheds as the units for reference...
- ☐ Focus in the biodiversity of natural species and of ecosystem types....
- ☐ Focus on agroforestry....

The coming sustainable technological model



and next

