

Project *brief*

Thünen Institute of Wood Research

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Evaluation of the Charter for Wood 2.0

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- **The key figures of the Forestry & Wood Cluster reflect the major challenges in the light of multiple crises.**
- **The possibilities of a circular bioeconomy for greater resilience are promising; the practical and concrete vision of the future in the forestry & wood cluster should be further refined.**
- **The Charter for Wood 2.0 holds considerable potential for the transformation of the forestry and wood industry.**

Background and objectives

The Charter for Wood 2.0 (CfH2.0) is a dialogue process initiated by the Federal Ministry of Food and Agriculture (BMEL). Currently, 68 experts from business, science and administration are exchanging ideas in working groups that are focused on the following six fields of action.



Quelle: Charta für Holz 2.0, Bundesministerium für Ernährung und Landwirtschaft (BMEL), 2022
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Figure 1: Primary goals and fields of action of the Charter for Wood 2.0.

Priority areas were developed for each field of action to guide the activities in the working groups. In addition, the area of research and development forms a cross-cutting topic across all fields of action.

The aim of the project is to support the contributions of the Charter for Wood 2.0 through a scientific and data-based survey of key figures from the forestry & wood cluster. This should help to make decisions on the further prioritisation of content. The mapping of developments in the cluster with regard to the core objectives of climate protection, value creation and resource efficiency indirectly shows the impact of the measures taken as part of the charter. At the same time, the project aims to analyse the Charter process internally and to develop proposals for optimisation and further development in close communication with those involved.

Approach

As part of the evaluation of CfH2.0, the first step is to draw up reports on key figures that show the current status and developments in the forestry & wood cluster. To this end, long-term data collected from various existing internal Thünen monitoring activities will be utilised and supplemented by external data. This takes place every two years. The aim of the report is to present current and long-term development trends in the forestry & wood cluster in order to assess the need for action and set priorities on this basis.

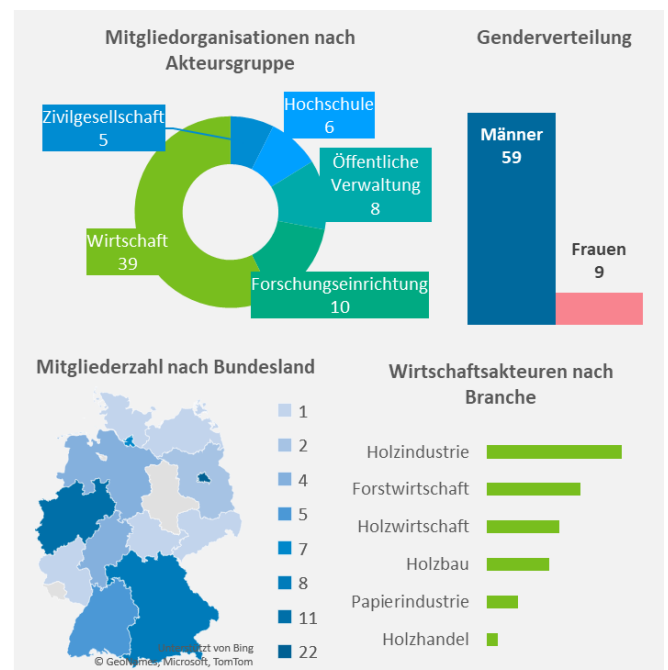


Figure 2: The working groups of the Charter for Wood 2.0 in figures (Source: own survey).

A further objective is to conduct research studies to analyse individual topics in greater depth in order to support the work of the working groups. The relevant topics are surveyed annually and the studies are published as Thünen Reports. A

third focus is on continuous communication with stakeholders in order to optimise the Charter for Wood 2.0 process.

Results

Development in the forestry & wood cluster is currently in a challenging phase. Although the need for bio-based solutions is omnipresent, at the same time calamities are leading to unplanned felling, the recruitment of labour is becoming more difficult, gross value added is falling and the recycling of both waste wood and hardwood is not showing any significant increase. The forestry & wood cluster is also lagging behind the overall economic trend in terms of innovation activities. Nevertheless, a rising timber construction rate shows that wood is experiencing increasing demand as a construction material. Interest in a circular bioeconomy that offers solutions for resilient transformation processes is growing accordingly. The Charter for Wood 2.0 holds considerable potential for the transformation of the forestry and timber industry in order to make it more resilient to ecological and economic crises. All relevant players in the sector are involved in the dialogue process. They have the expertise to grasp and solve complex problems in their entirety.

Outlook

In such participatory processes with a large number of stakeholders, task coordination is essential in order to tackle the identified measures (working group topics) in a systematic manner and thus ensure a certain goal-orientation. The objectives of the Charter for Wood 2.0 can only be achieved by

the sector as a whole. In order to realise the potential contained in the objectives, the following tasks could serve as future approaches to solutions within the framework of the Charter dialogue:

- A Charter for Wood network portal could promote knowledge transfer and industrial symbiosis by classifying (i) companies according to location, resources in input and output, and (ii) research locations according to their expertise with the help of an overview.
- Developing a future vision for the forest-wood sector as a cross-charter task in order to address the conflicting goals associated with the transformation and to make the sector and resource utilisation resilient. As part of the analysis, the possible application of R-strategies for the various product groups should be evaluated.

Furthermore, greater awareness and joint representation of the interests of the forestry & wood cluster can be helpful. In addition to the framework for action of the Charter for Wood 2.0, the following approaches can be considered expedient:

- Increased communication and joint representation of interests, which supports a uniform appearance of the cluster.
- Greater coordination of national activities in order to utilise resources efficiently. For example, the recording and presentation of individual national cluster initiatives could help to recognise synergies and develop them further across the board.

Further information

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