L A T I N A

2nd Latin America Forest Industry Conference

http://www.latinaforestconference.com

March 26 – 28, 2012
Transamerica Hotel
São Paulo, SP, Brazil.

Breaking Paradigms:

How can Latin America's Forest Industry continue to innovate and address new challenges?

The Forest Industry in Latin America grew rapidly over the past four decades as it developed its technological knowledge base that provided high yields per hectare and consequently a large competitive advantage of low-cost/high-quality wood fiber. In turn, these immense resource advantages were combined with large-scale investment in modern conversion facilities that were among the world leaders in the pulp, paper, packaging, lumber and wood based panel industries. These facilities were largely concentrated in Brazil & Chile, but notable investments are also to be found in Argentina, Uruguay, and Venezuela among others.

Many financial analysts mistakenly attribute the competitiveness of the forest industry in Latin America solely to the fact of being located in the southern hemisphere under favorable climatic and soil conditions. Any such analysis is too simplistic! Otherwise many other countries located under the same conditions of climate and soil would have enjoyed similar forest industry developments and the establishment of a thriving manufacturing sector. Clearly, political, legal and investment conditions also have to be favorable to take advantage of such positive geographical and climatic conditions.

Looking forward, how can Latin America further grow its forest industry base (perhaps in countries such as Peru, Colombia, Bolivia, etc.?), but also sustain its competitive advantage in its traditional base in Brazil & Chile? A favorable economic environment may take primacy in any assessment of the future, but to be a leader, the forest industry in Latin America must mold and not simply work within existing paradigms if it is to remain a leader (and not simply become a follower). Further developments in genetically improved plantation stock will be key to maintaining a low-cost supply of wood fiber. In turn, this development will support a globally competitive pulp, paper and wood products industry capable of supplying increasingly wealthy citizens of Latin America with the forest based products to meet a middle-class life-style (paper, building materials and furniture).

Along with other sectors of the global economy, sustainable and environmentally friendly ways to increase worldwide production of forest products will be needed to meet rising demand from emerging countries. Latin America is ideally placed to help meet a significant portion of this growing world market. But will this growing demand be met in a sustainable manner if new technologies and products are not first developed?

Cambridge Forest Products Associates, LLC
33 Seven Pines Ave. Cambridge, MA 02140, USA
Phone: +1-617-492-6367 - Mobile: + 1-781-223-6357

Forestry Products Marketing
Av. Divino Salvador, 841 / 122
04078-013 - Moema - São Paulo – SP - Brazil
Phone: + 55 (11) 4063-7785 / 4063-5523

Complicating the outlook further is the fact that demand for wood fiber has grown not only in traditional industries (Pulp, Paper, Packaging Board and Wood Products), but also for biomass for charcoal, wood pellets, and directly for power generation. Are these biomass products the best economic and environmental use of wood fiber? Will the future growth of the global forest industry a generation from now largely be based on these "new" sectors? If so, how will the forest industry meet all the new markets and continue to supply traditional end-uses? What has to "give" to balance demand and supply?

The **2nd LATIN AMERICA FOREST INDUSTRY CONFERENCE (LATINA)** will explore these and many other challenges faced by the Latin American Forest Industry. Our location in the same comfortable environment as the first LATINA conference – the Hotel Transamerica, São Paulo – will be highly conducive to networking and discussion.

Who should attend?

The conference provides an important and valuable forum for discussion and networking for forestry specialists, and for production, marketing, sales and strategic professionals in all sections of the forest industry.

Suppliers to the industry, as well as importers and exporters, merchants, printers and publishers, financial analysts, the investment community, members of the environmental movement, shipping and logistical companies will all benefit from this unique opportunity to better understand forest industry developments as well as the opportunities presented within Latin America.

Program

Monday, March 26

18.00 - 20.00 Registration

19.00 – 20.00 *Welcome Cocktail at the Transamerica Hotel*

Tuesday, March 27

Day One – Forest Industry: Global Challenges and Opportunities

All Day Registration

8.45 Welcome Address

9.00 Keynote Presentation

How Can Latin America's Forest Industry Sustain Its Growth?

Lairton Leonardi, President, ABTCP (Brazilian Pulp and Paper Technical Association)

Session I – Economy, Resources and New Markets

Moderator: Bernard Fuller, President, Cambridge Forest Products Associates (CFPA)

9.30 The Global Economy: Will the Developing World Continue to be the Locomotive for Growth?

Pablo F. G. Bréard, Vice-President and Head International Economic Research, Scotiabank Group

10.00 Fueling the Transformation of the Global Forest Industry: Opportunities in Biofuels, Wood Products and Pulp & Paper

Don Roberts, Vice Chairman and Managing Director, CIBC World Markets Inc.

10.30 *Coffee Break*

11.00 Arauco: An Integrated Global Forest Products Company Develops Successful Strategies for Wood & Pulp Products Markets

Charles Kimber, Corporate Affairs & Marketing Director, ARAUCO

11.30 New Market Segments for the Forest Industry

Marco Antônio Oliveira, Commercial Manager, SUZANO Forest Business

12.00 Attractiveness of Timberland Investments in Latin America

Robert Flynn, Director, International Timber, RISI

12.30 Panel Discussion: Questions & Answers

13.00 *Lunch*

Session II – Addressing Challenges: Industry Legislation and Barriers to Climb

Panel Discussion: Industry Legislation Issues

Moderator: César Reis, Executive Director, ABRAF

14.00 The New Brazilian Forest Code and its Impacts on the Global Forest Industry

Joésio Siqueira, Director, STCP Project Engineering

14.15 Foreign Land Ownership Limitations in Brazil and Argentina: a Model for Latin America and a Barrier to Future Investment and Growth?

Aldo de Cresci, Founder Partner, FGCN Law Firm

Argentine Government Representative

Brazilian Government Representative

Glenn Dunaway, Partner, Morris, Manning & Martin, Law Firm

Otávio Pontes, Vice-President, STORA ENSO Latin America

Walter Lídio Nunes, President, CMPC Celulose Rio Grandense

15.00 Panel Discussion: Questions & Answers

15.30 *Coffee Break*

16.00 Marketing Environmentally Acceptable Wood Products: The North American Experience with Regulation, Certification, and Sustainability.

Tom Julia, President, CPA (Composite Panel Association)

Panel Discussion: Restrictions on the Use of GMOs and Impacts on Competitiveness

Moderator: Celso Foelkel, President, Grau Celsius Consulting

16.30 Forest Plantations and Possible Restrictions on the use of Genetically Modified Organisms (GMOs): Impacts on Latin American Forest Industry Competitiveness

Eduardo Mello, Vice-President, FuturaGene

Juliana Vansan, Public Relations and Government Affairs, Manager, ArborGen

Patrícia Fukuma, Partner, Fukuma Law Firm

Roberto Waack, CEO, AMATA S.A. and FSC Director

17.30 Panel Discussion: Questions & Answers

18.00 Brazilian Forest Sector Competitiveness: Risks and Opportunities

João Comério, Executive Director, SUZANO

19.00 *Cocktail Reception at the Transamerica Hotel*

Wednesday, March 28

Day Two – Market Situation and Prospects

Session III – Focus on China: Market Potential and Business Opportunities between China and Latin America

Moderator: Roman Hohol, Director, Marketing Practice, AMEC Forest Industry Consulting

8.30 China's Impact on Global Wood Products Markets: Will It Continue to Grow?

Bernard Fuller, President, Cambridge Forest Products Associates (CFPA)

9.00 Will Asian Growth Continue to Support Surging Pulp Production in Latin America?

Heloisa Dórea, Director, Forestry Products Marketing (FPM)

9.30 How Will China Satisfy Its Wood Fiber Needs?

Robert Flynn, Director, International Timber, RISI

10.00 *Coffee Break*

10.30 China Panel:

China Wood International

Geraldo Ferreira, General Commercial Manager, Asia Pulp & Paper (APP) Brazil

Timo Teräs, Leading Advisor, PÖYRY Management Consulting Oy

Session IV – Trends and Prospects for Fiber, Wood Products, Paper & Paperboard Markets

Moderator: Bernard Fuller, President, Cambridge Forest Products Associates (CFPA)

11.30 Wood Fiber Price Trends and What They Say About the Demand/Supply Balance

Håkan Ekström, President, Wood Resources International (WRI)

12.00 Biomass Prospects in Latin America: Are They Overblown?

Ivan Tomaselli, President, STCP Project Engennering

12.30 Global Shortage of Recycled Fiber? What is the future role of virgin pulps?

João Cordeiro, Principal Associate, PÖYRY Management Consulting Oy

13.00 *Lunch*

14.00 The Threat to Future Global P&W Demand Posed by the Rapid Adoption of Digital Media

Roman Hohol, Director, Marketing Practice, AMEC Forest Industry Consulting

14.30 Lumber Demand Growth: Will Sawlog Quality and Supplies be Adequate?

Marcelo Wiecheteck, Business Unit Manager, STCP Project Engineering

15.00 Almost as Big as Pulp Mills!: How Modern MDF, OSB and Particleboard Mills Consume Lots of Fiber as They Meet Rapidly Growing Demand for Reconstituted Wood Products

Roberto Szachnowicz, Supply Chain Executive Director, DURATEX

15.30 Panel Discussion: Question & Answers

16.00 *Coffee Break*

Session V – Innovation: New Technologies, Products and Marketing Strategies

Moderator: Heloisa Dórea, Director, Forestry Products Marketing (FPM)

16.30 New Packaging and Design: Innovation in Fiber-Based Packaging

Gabriella Michelucci, Director, KLABIN Packaging

17.00 Tissue Markets: Producers Add Value to Their Products

Nestor de Castro, President, VOITH Brazil

17.30 Sawmill Innovation – The Hollow Wood Beam: Making More With Less

Pablo Korach, M.Sc. Chemical Engineering, Engineered Wood Products, Chile

18.00 Panel Discussion: Question & Answers and Wrap-up (Ends at 18.30)

Cambridge Forest Products Associates, LLC
33 Seven Pines Ave. Cambridge, MA 02140, USA
Phone: +1-617-492-6367 - Mobile: + 1-781-223-6357

Forestry Products Marketing
Av. Divino Salvador, 841 / 122
04078-013 - Moema - São Paulo – SP - Brazil
Phone: + 55 (11) 4063-7785 / 4063-5523