

# ITTO Tropical Investment Forum



**Sophie le Clue**



**ADM CAPITAL FOUNDATION**

# Taking Stock

## Adding Sustainability Variables to Asian Sectoral Analysis

Auto  
Banking  
Metals & Mining  
Oil, Gas & Petrochemicals  
Power  
**Pulp, Paper & Timber**  
Supply Chain  
Technology

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February 2006

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# ESG

ance environmental social governance env

Editor: Melissa Brown

Association for Sustainable & Responsible Investment in Asia



## ASrIA

# Pulp & Paper – Raw Material Deficits: Bad and Getting Worse

- **Unsustainable growth** - global growth
- **Waste paper** / raw material deficits
- **Project viability** concerns about availability and cost of wood supplies
- **More research** Due diligence by the financial community on a range of issues
- **Regulatory Risk**

Company	Capacity 1000 t/a
<b>Asian Listed Companies</b>	
Lee & Man Paper Manufacturing	250 350 400
Shandong Chenming	400
Shandong Huatai	450
Yuen Foong Yu Paper	500 500
Yueyang Paper	300
<b>Total</b>	<b>3,150</b>
<b>APP and APRIL</b>	
APP Hainan Jinhai pulp	1000
APP Ningxing Zhonghua	700
APP Gold East paper	700
APRIL	400
APRIL	1000
<b>Total</b>	<b>3,800</b>
<b>Other: non listed companies and/or international companies</b>	<b>6,780</b>
<b>Total</b>	<b>13,730</b>

- Data source : Jaako Poyry 2004

# **Outlook**

**Rising Expectations**

**Further listings, debt financings etc.**

**Standards = the sector's defacto enforcement**

**Technology development**



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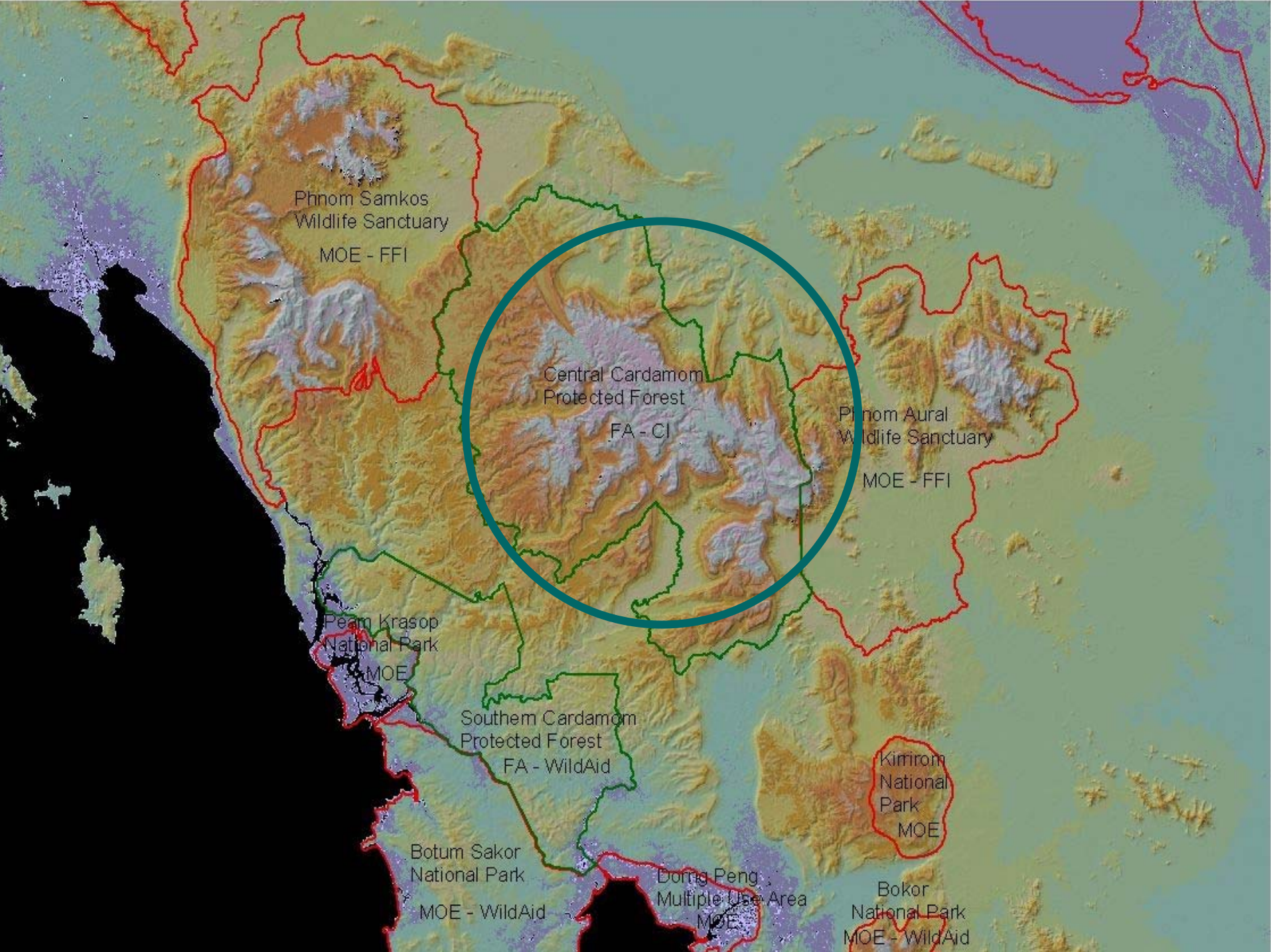
## **Our Philosophy**

- **Innovative approaches**
- **Holistic - beyond just financial assistance**
- **Alliances between the investment world and community based initiatives**

## **Our Approach**

- **Self-sustainable and replicable**
- **Leverage local resources**
- **Ability to attract other forms of support or funding**
- **On the ground due diligence**
- **Transparency, accountability,**
- **Assessing the benefits**





Phnom Samkos  
Wildlife Sanctuary

MOE - FFI

Central Cardamom  
Protected Forest

FA - CI

Phnom Aural  
Wildlife Sanctuary

MOE - FFI

Peam Krasop  
National Park

MOE

Southern Cardamom  
Protected Forest

FA - WildAid

Botum Sakor  
National Park

MOE - WildAid

Dong Peng  
Multiple Use Area

MOE

Kimirom  
National  
Park

MOE

Bokor  
National Park

MOE - WildAid



# Cardamom Highlands, Cambodia





# CONTACT US



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