Chapter 11
Markets for certified forest products[1]

Highlights

- The area of certified forests in the world has grown considerably over the last year, reaching about 124 million hectares by mid 2002, mainly driven by the Pan European Forest Certification (PEFC) and the Sustainable Forestry Initiative in the United States.
- The potential supply of certified forest products (CFPs) has grown in parallel with area certified and is estimated at 234 million m³ annually worldwide.
- A minor part of the wood supplied from certified forests is actually traded as (labelled) CFPs, *inter alia*, owing to a lack of chain of custody certificates and low customer and consumer awareness and demand.
- Today only about 2,600 chain of custody certificates exist, mainly in Europe and North America, and issued almost exclusively by the Forest Stewardship Council (FSC).
- Existing markets for CFPs continue to be mainly located in western Europe, especially the United Kingdom, Germany and the Netherlands, and the United States.
- FSC-certified CFPs are today available across a large range of forest products in the more advanced markets, and PEFC certified CFPs are slowly becoming more visible.
- The CFP market continues to grow exponentially with CFP market share of total wood consumption (paper excluded) estimated at 10% in the United Kingdom, 7% in the Netherlands and 1% or less in Germany. This strong growth is expected to continue across a wide range of product categories, including paper.
- Consumer awareness of CFPs continues to be low, even in the more advanced markets in western Europe, which is seen as one main impeding factor for market growth.
- Public procurement is an important driver of demand in several key importing countries, including the United Kingdom, the Netherlands and Germany, and is expected to remain so, *inter alia*, owing to the illegal logging issue.

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Secretariat introduction

Certified forest products markets continue to be an exciting facet of the forest sector, generating considerable attention by retailers as well as suppliers. The concern for assurance of sourcing forest products, both wood and paper, from sustainably managed forests also has an impact on the rest of the supply chain. Final consumers are slowly becoming aware of the issue of sustainable forest management, partly through the certification message. Certification currently appears to be a communication tool to bring the message about the region's sustainable forest management from producers to consumers.

The UNECE Timber Committee has a mandate to follow the markets for certified forest products and the FAO European Forestry Commission follows developments in certification of sustainable forest management. This chapter focuses on the market aspect. At its annual market discussions, the Committee discusses certified forest products.

Readers are alerted that the basis of information in this chapter is not the UNECE and FAO TIMBER database built on country-supplied statistics as in the previous chapters. Unfortunately no official statistics exist on certified forest products because they are not currently recognized in customs classification codes. Instead the analysis in the chapter has for its foundation a survey of the officially nominated country correspondents on certified forest products and certification of sustainable forest management. The UNECE Timber Committee and the FAO European Forestry Commission established this informal network of correspondents in 2001 to provide a neutral source of information. Unless otherwise attributed, all estimations in this chapter are from these correspondents' responses to the survey. We express our appreciation to all those country correspondents who replied on time to the survey. Further information from these correspondents, for example on forest certification, will be published by September 2002 in an update of a *Geneva Timber and Forest Discussion Paper*[2] on the status of certification of sustainable forest management in the UNECE region.

In addition to the correspondents' information, interviews with Global Forest and Trade Networks, certification schemes, auditing bodies, and with some of the major retailers of certified forest products, were conducted by the chapter author, Dr. Ewald Rametsteiner, Expert on Certified Forest Products Markets, from the Institute of Forest Sector Policy and Economics, Vienna, Austria, along with his assistant, Mr. Florian Kraxner, also from the Institute of Forest Sector Policy and Economics, Vienna. In total, about 55 experts across the UNECE region have contributed with information on CFP markets. We sincerely thank these experts for their valuable contributions. To these sources of information, Dr. Rametsteiner adds his expertise on the subject.

The secretariat once again thanks Dr. Rametsteiner for his up-to-date and informative analysis of the markets for certified forest products. He has contributed to the above-mentioned *Discussion Paper* series on certification and he also wrote *Sustainable Forest Management Certification*, which was published by the Liaison Unit, Vienna, of the Ministerial Conference on the Protection of Forests in Europe, where he also works.

11.1 Introduction

Certified forest product (CFP) markets have been analysed in a regular chapter in the *Review* since 1998. The Timber Committee considers CFPs an increasingly important area to cover in its market discussions and this background analysis. The discussion in the *Review* will concentrate on the market and trade aspects for CFPs. Non-independently certified forests or CFPs and process certification schemes such as ISO 14001 are not included, as these do not generally lead to certified forest products.

11.2 What are CFPs?

Certified forest products bear labels demonstrating in a verifiable manner by independent bodies that they come from forests that meet standards for sustainable forest management. Consumers might find labels on furniture and wood products, while manufacturers could verify the source of certified products from a system of chain of custody that identifies the origin of the wood.

11.3 Supply of CFPs

11.3.1 Forest area certified

By mid-2002 the total area of forests certified[3] worldwide is about 124 million hectares or about 3.2 %

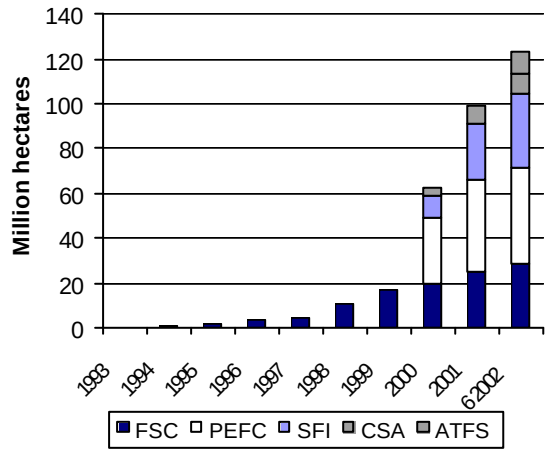
[2] *In preparation*, "Forest certification update for the UNECE region, summer 2002" by Ms. Jenni Raunetsalo, Dr. Eric Hansen, Dr. Heikki Juslin and Mr. Keith Forsyth. UNECE/FAO *Geneva Timber and Forest Discussion Paper*, ECE/TIM/DP/25, 2002, and on the UNECE Timber Committee website at: www.unece.org/trade/timber/docs/certification/

of the worlds forests. The last two years have seen an exponential increase of forest area certified according to different third party certification systems, including the Forest Stewardship Council (FSC), the Pan European Certification System (PEFC) in Europe and the Sustainable Forestry Initiative (SFI) in North America, as well as the Canadian Standards Association (CSA) system. Recently the American Tree Farm System (ATFS) in the United States has started third party audits. Today, these forest certification systems dominate the international market for forest certification. The Dutch Keurhout system is a major player in tropical forest approval, having a further 1.9 million hectares of forests approved additional to those already certified by others (Atyi and Simula 2002).

A tremendous increase in the total area of forests certified has occurred since 2000 as a result of the entrance of new third party certification programmes that certify large areas of forests either due to regional certification approaches, such as the PEFC, or industrial forest certification, such as the SFI programme (graph 11.3.1). FSC scheme's current market share is 23%, falling behind PEFC (34%) and SFI (26%). Please note that the graph contains overlaps owing to double certification, e.g. in the United States (0.4 million hectares SFI and FSC), Canada (0.63 million hectares SFI and CSA) and small areas in Europe, e.g. 10,000 hectares in Switzerland (FSC and PEFC/Q-Label).

GRAPH 11.3.1

Area of certified forest, 1993-2002



Notes: FSC = Forest Stewardship Council, PEFC = Pan European Certification System, SFI = Sustainable Forestry Initiative, CSA = Canadian Standards Association system, ATFS = American Tree Farm System.
Sources: Individual certification systems, and for ATFS, country correspondent, 2002.

The existing certification schemes expect further growth of certified forest areas in the coming year. In addition, several other schemes outside of the UNECE region have just started operational certification, such as the Malaysian Timber Certification Scheme or have certified small areas, such as the United States Green Tag Forestry. Other schemes are being established, for example in Indonesia, Brazil and Ghana. The Brazilian scheme, CERFLOR, has finalized its standard for plantations and is expected to become operational in 2002. In Canada preparations are under way to set up a system for small woodlot owners similar to the ATFS in the United States. Several of these schemes will add to the area of certified forests in 2002 and beyond.

Geographically, more than 90% of the total area certified is in the northern hemisphere, with half of the certified forest area located in Europe and 41% in North America. Developing countries account for less than 10% of the total forest area certified. The largest areas are in Brazil (1.12 million hectares FSC certified, 61% of which plantations), Congo (1.15 million hectares Keurhout approved), Bolivia (0.9 million hectares, FSC) and South Africa (0.81 million hectares FSC certified, 100% plantations). This imbalance between developed and developing countries has changed rapidly in the last two years with the emergence of new certification systems in Europe and North America. In 1996 the share of developing countries in the total was approximately 70%.

Forest certification up to now has clearly favoured large-scale industrial forest holdings. The majority of certified forest area is industrial forests, especially in the FSC system and the SFI programme. However, in both the United States and in western Europe more than half of the wood supply comes from non-industrial forest holdings. The PEFC system and the ATFS, as well as a planned Canadian woodlot owner system, (by 2003) are mainly targeting small-scale forest holdings and non-industrial forest holdings.

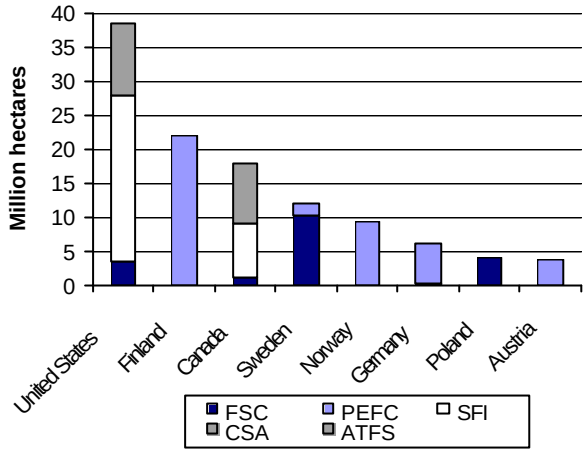
The United States and Finland are leaders in terms of forest area certified (graph 11.3.2). Since last year the situation became more balanced between the two continents, with further dramatic growth of the potential volume of CFPs. In Europe around 35% of the existing forest area[4] is already certified, compared with around

[3] Certification is understood here in the strict sense, requiring third party audit. Please note that ISO 14001 type process certification systems which usually do not lead to certified products in the market are not covered here.

[4] The reference area is based on *Temperate an Boreal Forest Resources Assessment 2000* data for forest area, excluding other wooded land (forest area in Europe excludes CIS countries).

GRAPH 11.3.2

Top 8 countries' certified forest area, mid 2002



Notes: FSC = Forest Stewardship Council, PEFC = Pan European Certification System, SFI = Sustainable Forestry Initiative, CSA = Canadian Standards Association system, ATFS = American Tree Farm System.
Source: Individual certification systems, and for ATFS, country correspondent, 2002.

18% of the forest area in the United States, 7% in Canada and less than 1% in Russia.

11.3.2 Supply of CFPs

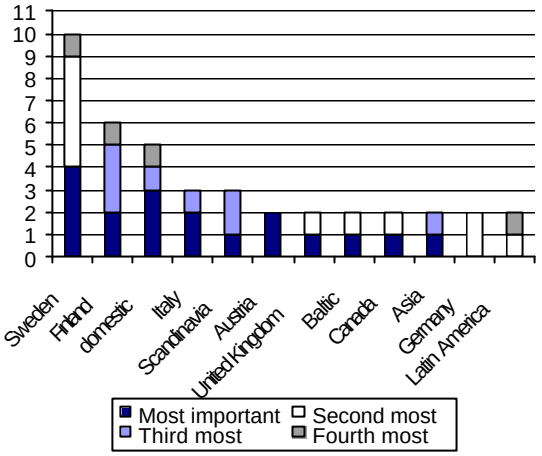
In 2002, the potential timber supply from the world's certified forests is large, estimated at about 234 million m^3 on an annual basis (Atyi and Simula, 2002). The roundwood supply of several large producing countries in Europe is up to 100% from certified forests, for example in Finland. However, only a small fraction of potential annual supply of wood from certified forests is actually traded as CFPs and a large majority is marketed without reference to certification status. In the absence of official trade figures the actual volume or share of CFPs is difficult to estimate.

Technically, the lack of chain-of-custody (CoC) certificate holders is a major constraint on supply. Today, about 2,500 CoC certificates are issued worldwide, of which about 2,350 or 94% are FSC and 142 are PEFC. Much of the wood from PEFC-certified forests and from forests certified according to SFI or CSA standards is thus technically not able to move downstream as CFPs.

Furthermore, only the FSC logo has been around for almost a decade. The PEFC system in Europe started to issue licences for logo use in 2001. A total of 3,734 companies to date (of which 94% in Germany) have the right to use the PEFC logo. Neither the SFI nor the CSA systems in North America currently label products. SFI has developed an SFI mark and is working further on verification for the wood supply chain. Similarly, CSA has introduced a forest products labelling programme. However, intermediary producers

GRAPH 11.3.3

Most important suppliers of certified forest products, 2002



Note: The vertical axis depicts the number of cases a country was mentioned in responses to the survey to the country on certification. The categories "first", "second", etc. show the ranking given for the countries (e.g. 4 correspondents ranked Sweden as the most important market, 5 as the second most and 1 as the fourth most).
Source: Estimations given by UNECE & FAO officially nominated network of country correspondents on certified forest products markets and certification of sustainable forest management in response to a request for information in May 2002. The results are based on the responses of 27 country correspondents within the UNECE region.

have not yet indicated strong demand for these additional labels.

The most important suppliers of CFPs today are Sweden and Finland according to the responses of the national correspondents network (graph 11.3.3). These and other traditionally export-oriented countries such as Austria mainly use domestic supplies. Scandinavian countries also source timber from certified forests from Baltic countries and thus are drivers of demand (see the following section). Please note that graph 11.3.3 does not distinguish between supply of raw material, secondary and finished products. Italy and others source their raw material from different regions, including eastern Europe, and supply the United Kingdom with further processed or final products. The United Kingdom in turn is reported to re-export finished products, such as furniture and DIY products to other countries. Similar complex trade pattern exist between Baltic and Nordic countries, from which a good part is re-exported to Germany, the United Kingdom and other markets. The majority of CFPs are temperate softwood. With nearly the total forest area of

a number of countries completely certified, trade patterns for CFPs over time have become identical with the traditional trade patterns existing in each country. Also tropical wood and hardwood CFP supply tends to follow established trade patterns.

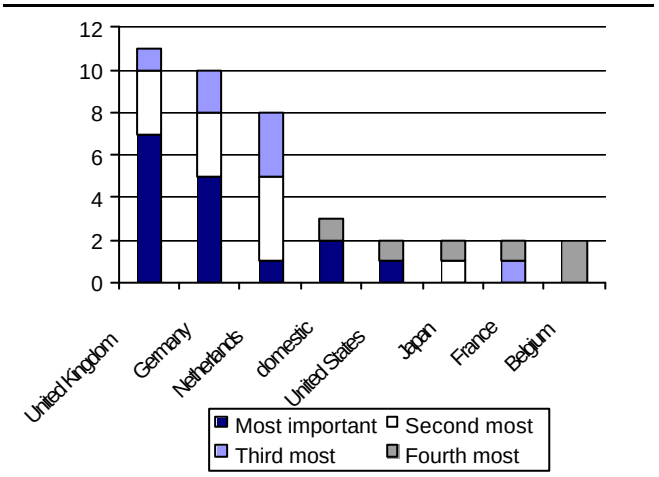
11.4 Demand for CFPs

11.4.1 Geographical location

Today CFPs are available in about 20 countries in the UNECE region. Market demand for CFPs continues to be mainly identified in western Europe. This result of the country correspondents survey confirms the findings of last year. Within Europe strongest demand for CFPs seems be in the United Kingdom. Germany is increasingly reported as a major market, followed by the Netherlands. The majority of internationally traded CFPs find their final destination

GRAPH 11.4.1

Most important markets for certified forest products, 2002



Note: The vertical axis depicts the number of cases a country was mentioned in responses to the survey to the country correspondents on certification. The categories "first", "second", etc. show the ranking given for the countries (e.g.: 7 correspondents ranked the United Kingdom as the most important market, 3 as the second most and 1 as the third most).
Source: Estimations given by UNECE & FAO officially nominated network of country correspondents on certified forest products markets and certification of sustainable forest management in response to a request for information in May 2002. The results are based on the responses of 27 country correspondents within the UNECE region.

there, followed by the United States and others, including Japan (graph 11. 4.1).

No, or at best low, interest in the final consumption of CFPs seems to prevail in the southern parts of Europe, in most eastern European countries and Russia. However, intermediary producers located in southern European countries are reported to import CFPs from various regions globally, e.g. small quantities of hardwood for furniture or raw material for panels. Nordic countries, Italy and some other countries apparently import CFPs for further processing and re-export products of which only a minor share to date bear a CFP label. Graph 11.4.1 has to be interpreted with caution as several trade routes of wood from certified forests have been highlighted where to date little demand for CFPs was reported, e.g. in Japan. It is possible or even likely that wood exported as CFPs is further processed or marketed without reference to certification status.

Information on the share of certified wood in major import markets is often based on rough estimates. In the United Kingdom respondents have provided a crude estimate of 10% of the total volume of wood consumption and around 1% of paper consumption to be CFPs. In the Netherlands, one of the few countries with more reliable data, the share of CFPs in total wood supply is currently estimated to be around 7% or about 620,000 m³ (FSC and Keurhout authorized wood), up from about 5 to 6% in the previous year. An estimation from Denmark is given at 500,000 m^3, Switzerland reported about 400,000 m^3, or 5 to 10% of total roundwood supply. In Germany the share, estimated in 2001 to be less than 1%, is still low but reported to growing. Other countries, such as Belgium, indicate a rough estimation of up to a maximum of 5%. Overall, the market share of CFPs of total volume of wood supply across Europe seems to be less than 5% in mid-2002. In the United States, an estimation is given of 2% of total consumption of wood to be eco-labelled and less than 1% of paper consumption. In Canada, it is estimated that more than 5% of wood and paper products carries an eco-label. In many countries a higher share of CFPs is reported to be labelled in the wood sector than in the paper sector. For Japan the estimation of CFPs is around 23,000 m³ or 0.02% of total wood consumption.

Business-to-business market players close to consumers, such as in retail, do-it-yourself or home improvement markets, continue to be the strongest drivers for demand, especially in the United States. However, up to now, a lack of demand for wood labelled with logos from forest certification schemes seems to prevail throughout the UNECE region, with the exception of a range of FSC labelled products. This is due to several factors, including low levels of awareness of CFP logos by customers and consumers as well as the interest of some retailers in using their own rather than newly introduced marks. Owing to this low consumer demand and awareness, little pressure is exerted on middlemen to get a chain-of-custody certification or to label all forest products as CFP.

Potential suppliers have also experienced that company policy statements have not always been followed up, especially in the United States.

Of the labelled CFPs available on the market, the majority are FSC-certified. In more than 14 countries of the UNECE region, FSC-certified CFPs are reported to be available, compared to more than 7 countries with PEFC products. In about 8 countries, mostly northwestern European countries, Canada and the United States, CFPs are available across the whole spectrum of wood products, including paper, paperboard, panels, interior and exterior construction, furniture and DIY products. In most countries CFP demand seems to focus on few specific product groups.

It is expected that the number of countries where PEFC-certified wood is available across a wider range of products will increase considerably. Over the coming year many respondents expected a market growth between a further 50 to 100% of certified wood, especially for PEFC products in the sawnwood and panel sectors, as well as paper products, i.e. in the further processing sectors. Strong market growth is also expected for some construction components such as flooring. Responses from retailers indicate moderate growth expectations.

Also a lack of supply of CFPs is still reported in major European import markets, including the United Kingdom, the Netherlands and in Germany as well as in the United States. However, this seems to be mainly concentrated on FSC-certified niche products and adequate quality and quantity of products at times. This includes teak for garden furniture after FSC put certificates in Indonesia on hold. At the same time, a lack of demand is expressed in several other countries, e.g. by exporting countries with PEFC-certified products, but also by FSC CFP suppliers, e.g. softwood from some eastern European suppliers.

The Global Forest and Trade Network (GFTN), designed to create demand for CFPs by the World Wide Fund for Nature (WWF) through WWF Buyers and Producers Groups, comprises 714 members in mid-2002, about the same number as in 2001. Active in around 20 countries worldwide, more than half of these companies are located in western Europe, and more than 90% are in Europe or North America. GTFN seems to still cover about 50% of CFP demand in major import markets, such as in the United Kingdom, the Netherlands and the United States. In other countries the network has been less successful.

Anecdotal information on price premiums actually paid in the business-to-business markets indicates difficulties in securing a stable supply of CFPs according to specifications needed and premiums tend to occur in niche markets. Price premiums have been reported for tropical hardwoods, and also for FSC-certified softwood roundwood sold to local suppliers, e.g. in Switzerland. Comparative price quotes for FSC-certified sawn hardwood species reported by a market intelligence service indicate price premiums sought in the range of 12 to 20% (hardwoodmarkets.com, 2002). Atyi and Simula (2002) note that, as the current demand for certified tropical timber exceeds supply in some export markets, some suppliers report price premiums ranging from 5% to 65% in sawnwood and plywood. The higher figures refer to specialty products sold through retail outlets. With a more efficient market, such price premiums, where they exist outside niche markets, are likely to disappear. However, it is likely that price premiums will continue to exist for a range of tropical higher value products where demand will outstrip supply for some time to come.

Oliver (2001) reported on a survey of European furniture manufacturers, indicating very little interest from these companies in forest certification. The issue, more important in the United Kingdom, central Europe, and Nordic countries, was found to be more important for low value furniture supplied to the DIY sector.

11.4.2 Country situations

In the United Kingdom, the market situation varies by sector. The DIY sector seems to show most demand for CFPs, while other intermediary producers and traders show less interest. Headed by large companies like B&Q, some players in the DIY sector aim to assure their customers about timber use. Major building suppliers, such as Saint-Gobain intend to become involved in the CFP market, possibly encouraged by the Government's timber purchasing policy issued in 2000. Timber supplied to those retail sectors is generally softwoods and panel products, *inter alia*, from producers such as Ireland, Scandinavia and the Baltic countries.

In the Netherlands, demand for tropical CFPs is rather high, especially in the professional sector, but supply is lagging behind (Bosdijk 2002). Demand for Nordic softwood so far does not exist. Bosdijk states that only recently the leading softwood importing companies in the Netherlands private sector have decided to offer the market all softwood from Keurhout accepted certified forests with this label. This will give a tremendous boost to the availability of CFPs on the Netherlands market. Furthermore, it was reported that the Government has taken steps to set up a new guideline for judging sustainably produced wood on the Netherlands market over the next year.

In Germany several large DIY chains, members of the GTFN, are the main drivers of demand for FSC-certified tropical wood. Likewise, a range of municipalities has issued purchasing policies restricting tropical timber use or favouring or prescribing CFPs, if tropical timber is to be used. As in the Netherlands, demand for non-tropical CFPs has been low across the range of products. As the Association of German Magazine Publishers and the Association of German Paper Industries have recently accepted PEFC, some changes in these sectors are expected soon.

In the United States demand is mainly created by a few very large DIY retailers, such as Home Depot and Lowe´s. These retail chains prefer their own label over those of forest certification schemes. IKEA, a large furniture retailer with headquarters in Europe, has a similar strategy, with only some specific products, such as high quality woods, labelled by FSC. Also some pulp and paper producers, for example Norske Skog in Norway, have so far preferred not to label their CFPs.

11.4.3 Final consumer demand

11.4.3.1 Private consumers

Demand by private end consumers remains an insignificant factor in the market for CFPs. Nevertheless general consumer sentiment on deforestation, forest degradation and loss of biodiversity and notably on tropical deforestation keeps the sector under pressure to act. Surveys conducted in major European markets show that the public is of the opinion that forest area and forest biodiversity is declining both domestically and abroad, with an especially negative view on deforestation in tropical countries (Rametsteiner 1999). Surveys also show that consumers especially blame forestry and logging for deforestation in the tropics (ibid.).

Forest certification is increasingly becoming a main instrument for communication on sustainable forest management throughout the forest and trade sectors. CFPs are able to help to maintain or enhance the overall green image of wood products, one of the most important competitive strengths of wood against substitute materials. However, consumer awareness of even the longest established logo on CFPs, of the FSC, is still low even in the most advanced markets such as the United Kingdom, the Netherlands or Germany. The secondary importance of environmental friendliness as a quality characteristic of products gives little reason to forecast significant changes.

Consumers in some western European markets show sensitivity to environmental friendliness of tropical wood products, if they recognize a wood product as being of tropical origin. Partly as a consequence, garden furniture made of certified tropical wood is one of the few markets with stronger indications of demand directly from final consumers, especially in the Netherlands, Denmark, Belgium and Germany.

Many players active in the market see the lack of consumer awareness and interest as a major hampering factor for market growth. With PR campaigns on CFPs in several countries running or about to start, awareness is destined to grow, albeit very slowly.

11.4.3.2 Public procurement

Public procurement continued to become a growing source of demand for CFPs. Several national Governments have announced public procurement measures that directly or indirectly favour CFPs, especially for tropical timber, including the United Kingdom's "Central Government Timber Procurement Policy". The Governments of the Netherlands and Denmark, and recently the French and German environment ministries, have all communicated public procurement policies that include criteria favouring the purchase of CFPs. This adds to policies already existing at the municipality level in several European countries, including the United Kingdom, Denmark, the Nordic States, the Netherlands, Belgium, Germany, Switzerland and Austria as well as in several states of the United States.

Not every policy is implemented as written. In the United Kingdom, the WWF claims that only a minority of local municipalities actually have a purchasing policy requiring CFPs and that the United Kingdom policy announcement was not followed up by action. Surveys conducted in the course of this review nevertheless indicate that public procurement is estimated to be responsible for up to 40% of demand for CFPs in the United Kingdom, 25% in the Netherlands and is an important factor in several other countries, including Belgium, Switzerland and the United States. No indication of the scale of demand by public bodies is available from Germany.

A further issue has emerged strongly in most of the above-mentioned countries that is likely to push CFPs in governmental purchasing: the fight against illegal logging. A decision in 2001 by the Government of Denmark recognizes the FSC label as an example of an instrument to provide credible assurance that timber is legally and sustainably produced. Denmark is currently drawing up guidelines for the public purchase of tropical timber, to be adopted in 2003. The European Community is still in the process of revising its public procurement policy and it intends to set actions addressing illegal logging that might involve

certification mechanisms. It is likely that some other European Governments will follow with similar action over the next years. Governments are, however, very unlikely to specify one single scheme as being acceptable.

11.5 Conclusion

As more and more temperate forests become certified, supplying CFPs increasingly becomes standard business practice for softwood. However, with little interest from final consumers and low recognition value of individual logos, it is becoming more common that intermediaries supplying large retailers or producers of final products will be required to document their sourcing from certified forests. Final producers and retailers will then use their own labels on products they sell.

The situation is considerably different for CFPs from FSC certified tropical forests. Owing to lack of supply and the credibility of backers of FSC, FSC certified specialty and decorative products such as garden furniture can be sold with a premium and are marketed with the FSC logo. The difficulty of establishing credible certification systems and chains of custody from tropical regions will continue to restrict supply of tropical CFPs, with the exception of wood from large FSC certified plantations. Discussions in 2002 and 2003 will focus, *inter alia*, on possibilities of phased approaches to certification in tropical countries.

This chapter attempted to give an update on the market situation of CFPs in the UNECE region, based on information provided by about 45 experts across the region, as well as on other sources.

Owing to a lack of CFP information in official statistics, comprehensive and objective information of this new market sector will remain difficult.

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