



**FORESTS  
FOR ALL  
FOREVER**



# MARKETINFOPACK 2015

An overview of recent trends  
and current status of  
Forest Stewardship Council®  
(FSC®) certification  
June 2015



---

# CONTENTS

<b>04</b>	About FSC
<b>09</b>	Executive summary
<b>10</b>	FSC by numbers
<b>23</b>	Reasons to choose FSC
<b>33</b>	FSC in markets: updates and innovation
<b>38</b>	FSC tools and services

## EXPLANATORY NOTES

This document is available in digital format only, see <http://www.ic.fsc.org> under Resources.

It is a living document, updated periodically with one full revision annually. It is a tool intended to be used by FSC and its stakeholders.

A comma is used as a thousands separator, for example 1,000 is one thousand.

A point is used to indicate decimals.

Details and percentages in the tables do not necessarily add up to totals due to rounding.

The source of the data is indicated for each graph.

Data in the About FSC section is until 1st June 2015. All other sections provide data until 15th January 2015.

Minor discrepancies between constituent figures and totals are due to rounding.

Closing date: June 2015.

Cover photos: © FSC A.C. / Christian Irrgang; © FSC A.C. / Milan Reska; © FSC A.C.

For the latest figures on FSC certificates and presence worldwide, please visit the FSC International website at <https://ic.fsc.org>.

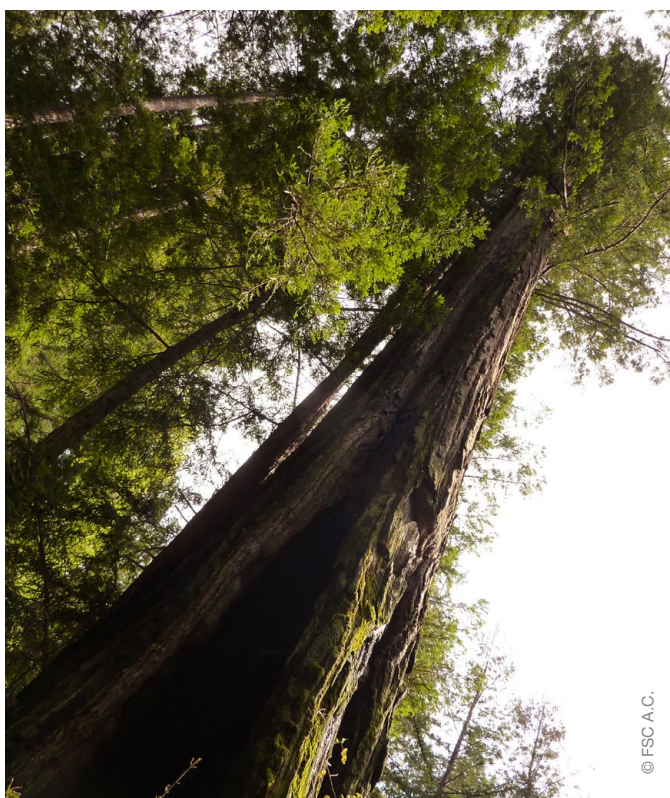


Source: FSC Certificate Holder Database  
1 As of 1 June 2015.  
2 As of 15 June 2015.  
3 As of 1 June 2015.  
4 As of 15 June 2015.  
5 As of 15 June 2015.  
6 As of 1 June 2015.



# ABOUT FSC

# ABOUT FSC



© FSC A.C.

FSC is a global, not-for-profit organization dedicated to the promotion of responsible forest management worldwide. It enables businesses and consumers to make informed choices about the forest products they buy, and creates positive change by engaging the power of market dynamics.

## OUR VISION

The world's forests meet the social, ecological and economic rights and needs of the present generation without compromising those of future generations.

## OUR MISSION

The Forest Stewardship Council (FSC) shall promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests.

## ACTIVITIES

FSC is a multi-stakeholder organization; it was founded in 1994 to provide an internationally recognized global certification scheme to ensure responsible management of the world's forests.



Years of  
**growth**  
with FSC®  
1994-2014

Responsibly managed forests continue to deliver environmental, social and economic benefits. These benefits may include maintaining and enhancing biodiversity and the environmental services provided by forests, such as water

storage and supply and carbon sequestration, good and safe conditions for workers, respect for Indigenous People's rights and the well-being of communities. The economic benefit comes mainly from supplying and selling forest products guaranteed to have been responsibly sourced – a vital part of most businesses' corporate social responsibility (CSR) in today's changing world.

The FSC system provides two kinds of certification to ensure that its values are maintained from forest to consumer – forest management and chain of custody. ►

### CONTROLLED WOOD

FSC also endorses virgin wood or wood fiber that has a low probability of being harvested:

- illegally;
- in violation of traditional or civil rights;
- from high conservation value forest;
- from areas where natural or seminatural forest has been converted to plantations; or
- from forests in which genetically modified trees are planted.



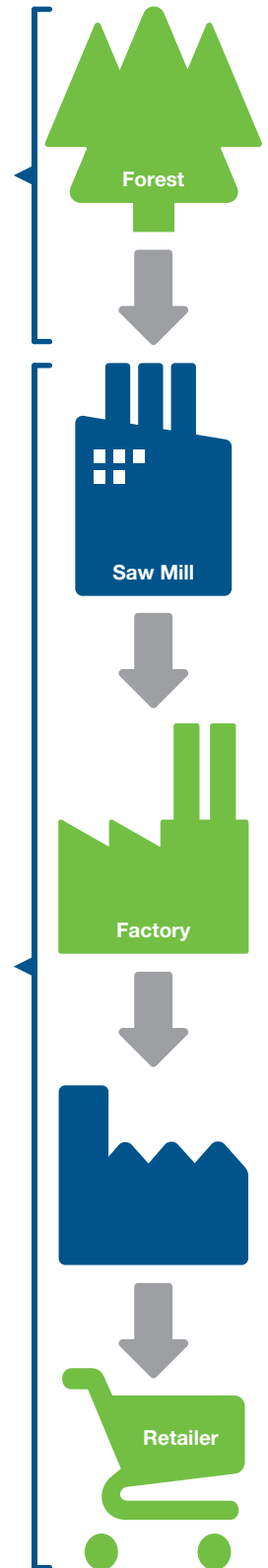
### FOREST MANAGEMENT CERTIFICATION

Forest management (FM) certification shows that forest managers (or owners) are managing their forests in a responsible way. It sets the standards for responsible management of natural and plantation forests. Certification audits verify that the forest management is in compliance with these standards.

FSC offers streamlined certification procedures for small and low-intensity managed forests (SLIMFs) for small-scale producers.

### CHAIN OF CUSTODY CERTIFICATION

Chain of custody (CoC) certification applies to those (mainly companies) who process, trade or manufacture FSC-certified wood or derived materials. It tracks the products from forest to shelf, keeping FSC-certified wood and products separate from uncertified materials and products, thus ensuring the value of certification right through the value chain to the customer.



## FSC'S GLOBAL ORGANIZATION

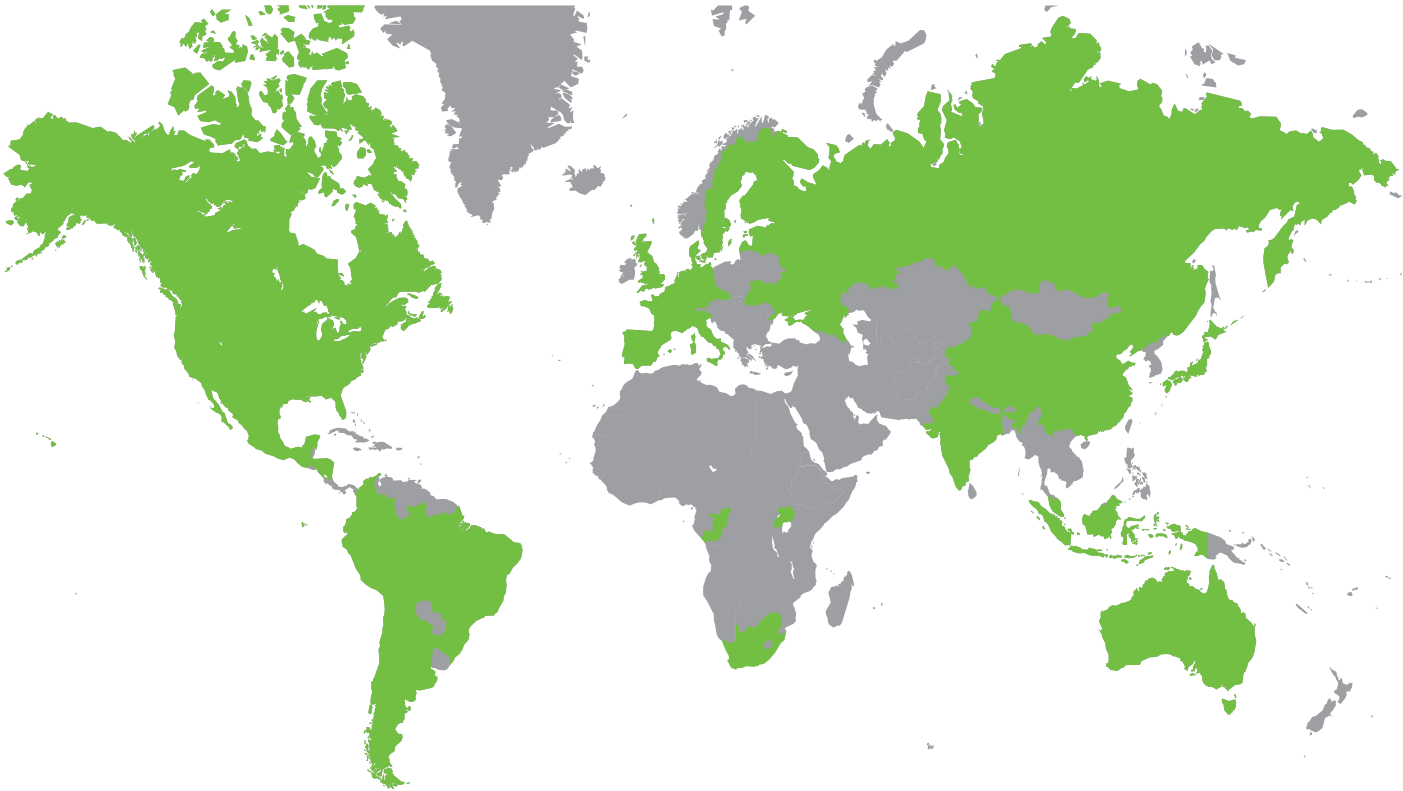
FSC is a global organization, with:

More than  
**30,000**  
certificates issued in over  
**100**  
countries

More than  
**184**  
million hectares of  
certified forests  
**globally**

**41**  
network partners and  
**4**  
regional offices,<sup>7</sup> present in  
numerous regions  
around the world

FSC's representation is outlined in the following map.



■ Countries with FSC representation

<sup>7</sup> Source: FSC International International Center, April 2015.

<h1 style="font-size: 48px; margin: 0;">1</h1> <p style="margin: 0;"><b>FSC International</b></p>	<h1 style="font-size: 48px; margin: 0;">4</h1> <p style="margin: 0;"><b>FSC Regional Offices</b></p>	<h1 style="font-size: 48px; margin: 0;">3</h1> <p style="margin: 0;"><b>FSC Subregional Offices</b></p>	<h1 style="font-size: 48px; margin: 0;">30</h1> <p style="margin: 0;"><b>FSC National Offices</b></p>	<h1 style="font-size: 48px; margin: 0;">7</h1> <p style="margin: 0;"><b>FSC National Representatives</b></p>	<h1 style="font-size: 48px; margin: 0;">1</h1> <p style="margin: 0;"><b>FSC National Focal Points</b></p>
<p>Bonn, Germany</p> <p>FSC A.C., Oaxaca, Mexico</p>	<p>Africa Asia Pacific Latin America Russia + CIS</p>	<p>Central America Congo Basin East Africa</p>	<p>5 Continents<sup>†</sup></p>	<p>Argentina Republic of Congo India Indonesia Latvia Mexico Ukraine</p>	<p>Uganda</p>
<p>International Secretariat</p>	<p>Promotion of FSC certification at regional level</p> <p>Service provision to FSC national offices, clients and stakeholders at regional level</p>	<p>Promotion of FSC certification at subregional level</p> <p>Service provision to FSC national offices, clients and stakeholders at regional level</p>	<p>Promotion of FSC certification at national level</p> <p>Service provision to FSC clients and stakeholders</p>	<p>Acting as focal point of FSC issues at national level</p>	<p>Promote and raise awareness of FSC at national level</p>



<sup>†</sup> Australia, Belgium, Bolivia, Brazil, Canada, Chile, China, Czech Republic, Denmark, Ecuador, Estonia, Finland, France, Germany, Guatemala, Honduras, Italy, Japan, Luxembourg, Malaysia, Netherlands, Nicaragua, Peru, Portugal, Russia, Spain, Sweden, Switzerland, United Kingdom, United States.

# EXECUTIVE SUMMARY

FSC continues to grow and expand its reach. There are now over 184 million hectares of FSC-certified forest in 80 countries worldwide. The number of FSC Forest Management (FM) certificates has increased by about 33 percent from 987 in 2010 to 1,311 in 2015. Some 72 percent of this area is concentrated in Canada, Russia, the United States, Sweden, Poland and Brazil. Some 65 percent of the certified forest area is natural forest and 8 percent plantations. Some 42 percent of the certificates are in place in Europe, with Latin America and North America representing 18–19 percent each. About 42 percent of the certificates are for natural forests and 26 percent for plantations.

Meanwhile, the number of FSC chain of custody (CoC) certificates increased by 81 percent from 15,766 in 2010 to 28,604 in 2015. Some 52

percent of these were issued in Europe, with Asia taking 25 percent, while growth has been strongest in Latin America and the Caribbean.

Smallholders make up 22 percent of all FM certificates, an increase of 2 percent from 2014. They account for 4 percent of the total certified area, and FSC is committed to support a general increase of smallholder representation in the system.

The evidence for the benefits of FSC certification is also growing year on year. This evidence comes from the strength of the brand, increasing customer awareness and “green” choices, and increasing visibility in the global media. To build on this and enable certificate holders to promote their products and FSC in general, FSC has developed a marketing toolkit, which is freely available online to all license holders.



© FSC A.C / Christian Irgang



# FSC BY NUMBERS

# FSC BY NUMBERS

## FSC FOREST MANAGEMENT

Table 1. Largest FSC-certified forest areas in the world (by country)<sup>8</sup>

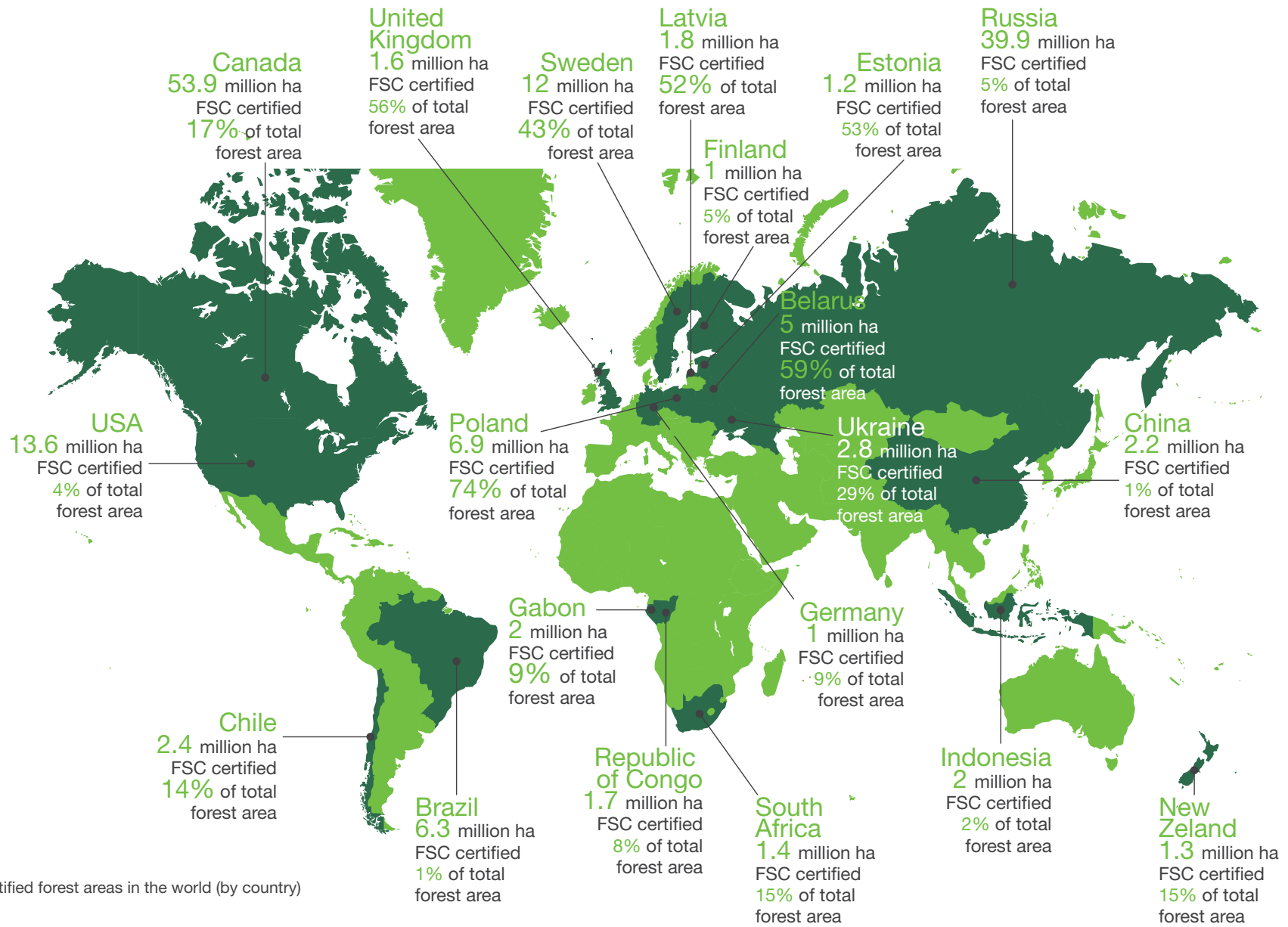
Country	FSC-certified area (Mha) <sup>9</sup>	Percentage of total forest area <sup>10</sup>
Canada	53.9	17
Russia	39.9	5
United States	13.6	4
Sweden	12	43
Poland	6.9	74
Brazil	6.3	1
Belarus	5	59
Ukraine	2.8	29
Chile	2.4	14
China	2.2	1
Gabon	2	9
Indonesia	2	2
Latvia	1.8	52
Congo, Republic of	1.7	8
United Kingdom	1.6	56
South Africa	1.4	15
New Zealand	1.3	15
Estonia	1.2	53
Finland	1	5
Germany	1	9

Canada, Russia, the United States and Sweden account for 65 percent of the total FSC-certified area. With Poland and Brazil (the fifth and sixth largest certified areas, respectively), these six countries cover 72 percent of the total FSC-certified area (132 Mha). Canada alone (53.9 Mha in 2015) has about one third (29 percent) of the total FSC-certified area, while Russia (39.9 Mha in 2015) has about one fifth (21 percent).

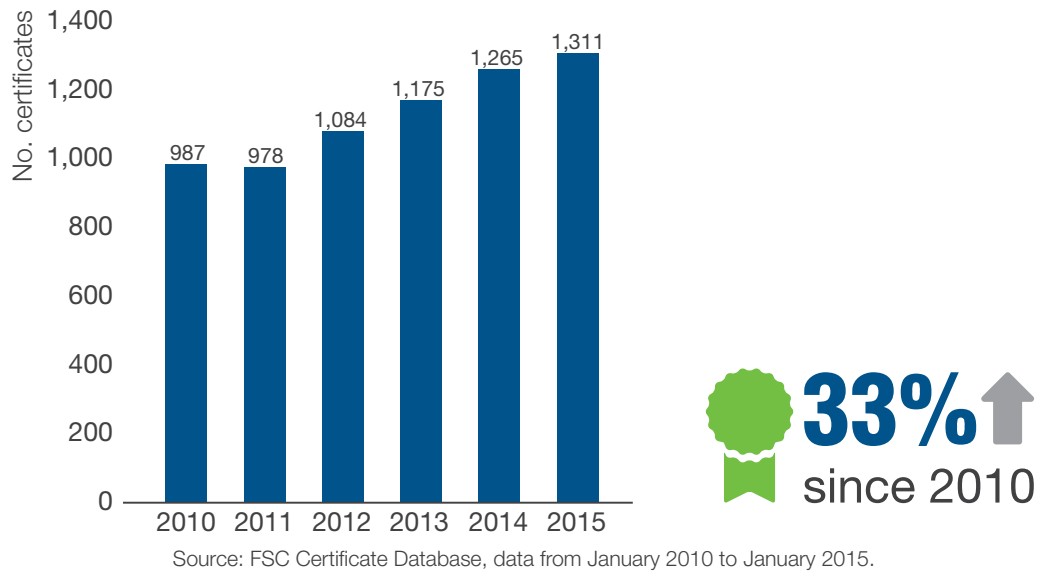
<sup>8</sup> Countries with the largest areas where FSC has representation.

<sup>9</sup> Source: FSC Certificate Database, data as of January 2015.

<sup>10</sup> Source: Food and Agriculture Organization of the United Nations, 2010. *Forestry Global Forest Resources Assessment 2010*. FAO Forestry Paper No. 163. FAO, Rome, Italy. <http://www.fao.org/docrep/013/i1757e/i1757e.pdf> (accessed 1 June 2015), except for China: Global Forest Watch, Data, <http://www.globalforestwatch.org/sources> (accessed 1 June 2015). Estimated percentage given the different definitions for 'forest cover'.

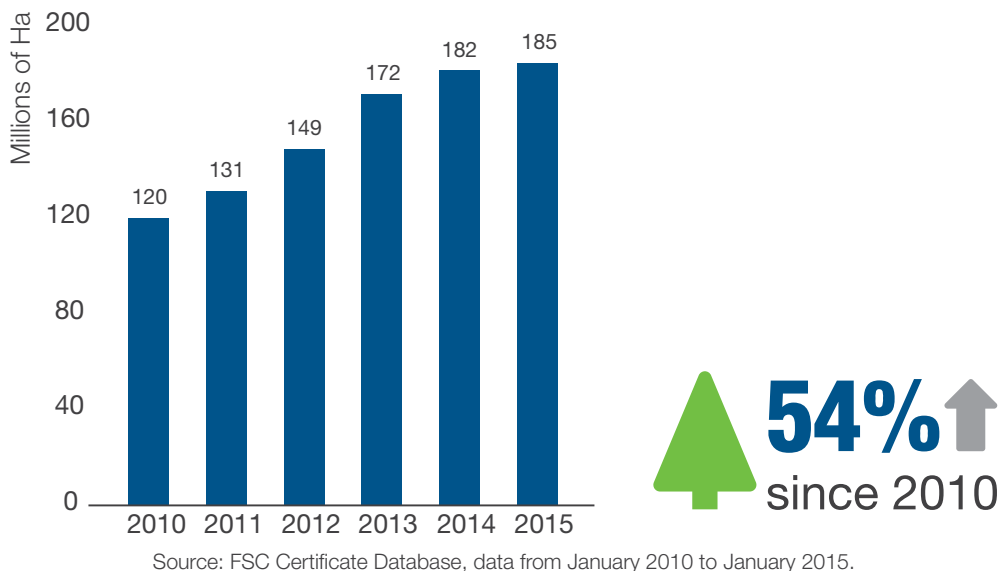


**Figure 1. Evolution of FSC FM certificates, 2010–2015**



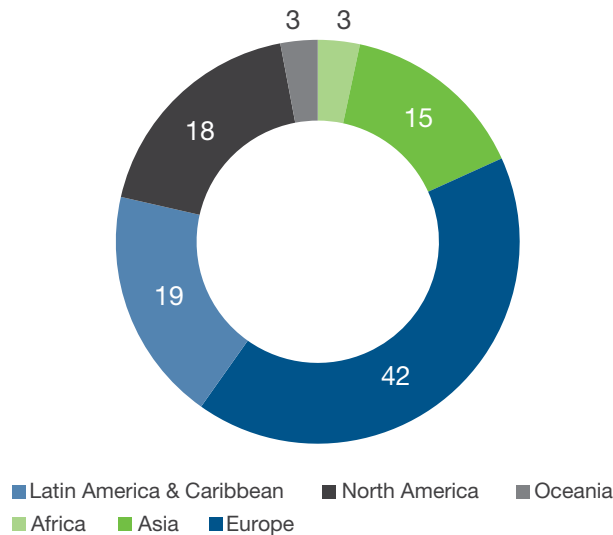
FM certification is awarded to forest managers or owners whose management practices meet the requirements of the FSC Principles and Criteria. The number of FM certificates increased from 987 in 2010 to 1,311 in 2015, which represents a 33 percent increase in a 5-year period.

**Figure 2. Evolution of FSC-certified forest area, 2010–2015**



Over 184 million hectares of forest in 80 countries were managed according to FSC standards in 2015, showing a growth of over 50 percent from 120 million hectares in 2010.

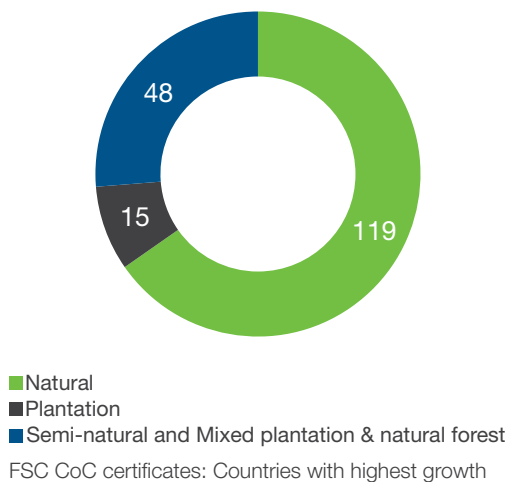
**Figure 3. Global distribution of FSC FM certificates by region (%)**



Source: FSC Certificate Database, January 2015.

Europe has the largest share of FSC FM certificates with a total of 545, followed by Latin America and North America with 246 and 242 certificates, respectively.

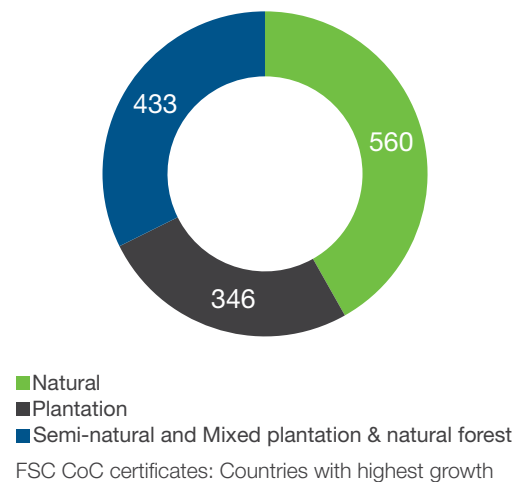
**Figure 4. Global FSC-certified area by forest type (Mha)**



FSC CoC certificates: Countries with highest growth

Natural forest dominates the FSC-certified forest area at 65 percent, while plantations make up just 8.2 percent of the global FSC-certified area.

**Figure 5. Global FSC FM certificates by forest type (number of certificates)**



FSC CoC certificates: Countries with highest growth

Again, natural forests dominate in terms of FM certificate ownership, with 41.8 percent of the 1,339 FM certificates. Plantations account for 25.8 percent of the FM certificates.

Table 2 lists countries that experienced high growth in FSC-certified forest area between January 2013 and January 2015.

**Table 2. FSC-certified forest area: Countries with highest growth, 2013 - 2015**

(Average annual percentage change)

Country	2013		2015		Increase in certified forest area (%)
	FSC-certified area (ha)	No. FSC FM certificates	FSC-certified area (ha)	No. FSC FM certificates	
Mozambique	5,310	1	59,905	3	446
Papua New Guinea	32,614	2	182,392	3	203
Panama	14,265	8	41,876	9	139
Romania	718,432	5	2,552,563	15	122
Bulgaria	231,406	12	685,969	17	73
Finland	430,419	4	1,071,199	6	70
Turkey	873,360	3	2,355,612	8	68
Viet Nam	48,923	8	133,823	11	66
Chile	1,171,129	20	2,356,256	23	49
Ukraine	1,590,201	10	2,787,730	23	47

FSC FM certificates: Countries with highest growth

Mozambique experienced the highest average annual percentage growth in FSC-certified area of more than 400 percent. This was achieved by the addition of just two certificates. Meanwhile, Papua New Guinea achieved over 200 percent average growth per year by the addition of just one certificate. Just these 'top two' growth countries demonstrate the diversity of extent of forest area covered by certificates, and the large impact that adding just one large forest owner to the FSC scheme can have.

Although their growth rates were much lower, in absolute terms the area of FSC-certified forest grew the most in Romania, Turkey, Ukraine and Chile, each of which saw over one million hectares of newly certified forest between January 2013 and January 2015.

The list of countries is diverse, with representation from most of the world's regions – Africa, Asia, Europe, Latin America and Oceania.



■ FSC-certified forest area: Countries with highest growth 2013-2015

## FSC CHAIN OF CUSTODY

**Table 3. FSC CoC certificates: Countries with highest growth**  
(Average annual percentage change)

Country	FSC CoC certificates 2013	FSC CoC certificates 2015	Percentage increase in CoC certificates
Romania	102	297	73
Bosnia and Herzegovina	121	258	51
Ukraine	34	66	40
United Arab Emirates	45	86	39
Serbia	58	104	38
Russia	171	295	32
China	2,412	3,799	26
Turkey	121	190	25
Hungary	84	131	25
Poland	823	1,186	20
Lithuania	137	197	20
Portugal	114	162	19
Mexico	67	93	18
Taiwan	128	174	17
Viet Nam	295	396	16
Finland	80	107	16
Croatia (Hrvatska)	170	227	16
Czech Republic	132	176	150
Spain	524	696	15
Chile	95	125	15

Source: FSC Certificate Database, data from January 2013 to January 2015.

Table 3 shows some of the countries with the highest number of FSC CoC certificates that have experienced the highest average annual percentage growth between January 2013 and January 2015.

Romania has experienced the fastest average annual growth in CoC certificates at over 70 percent per year, followed by Bosnia and Herzegovina (over 50 percent). However, in absolute terms (i.e. numbers of certificates issued), the greatest growth occurred in China, with over a thousand more new certificates than second placed Poland.

The list is dominated by Europe and Asia, with the only fast-growing Latin American country being Mexico.

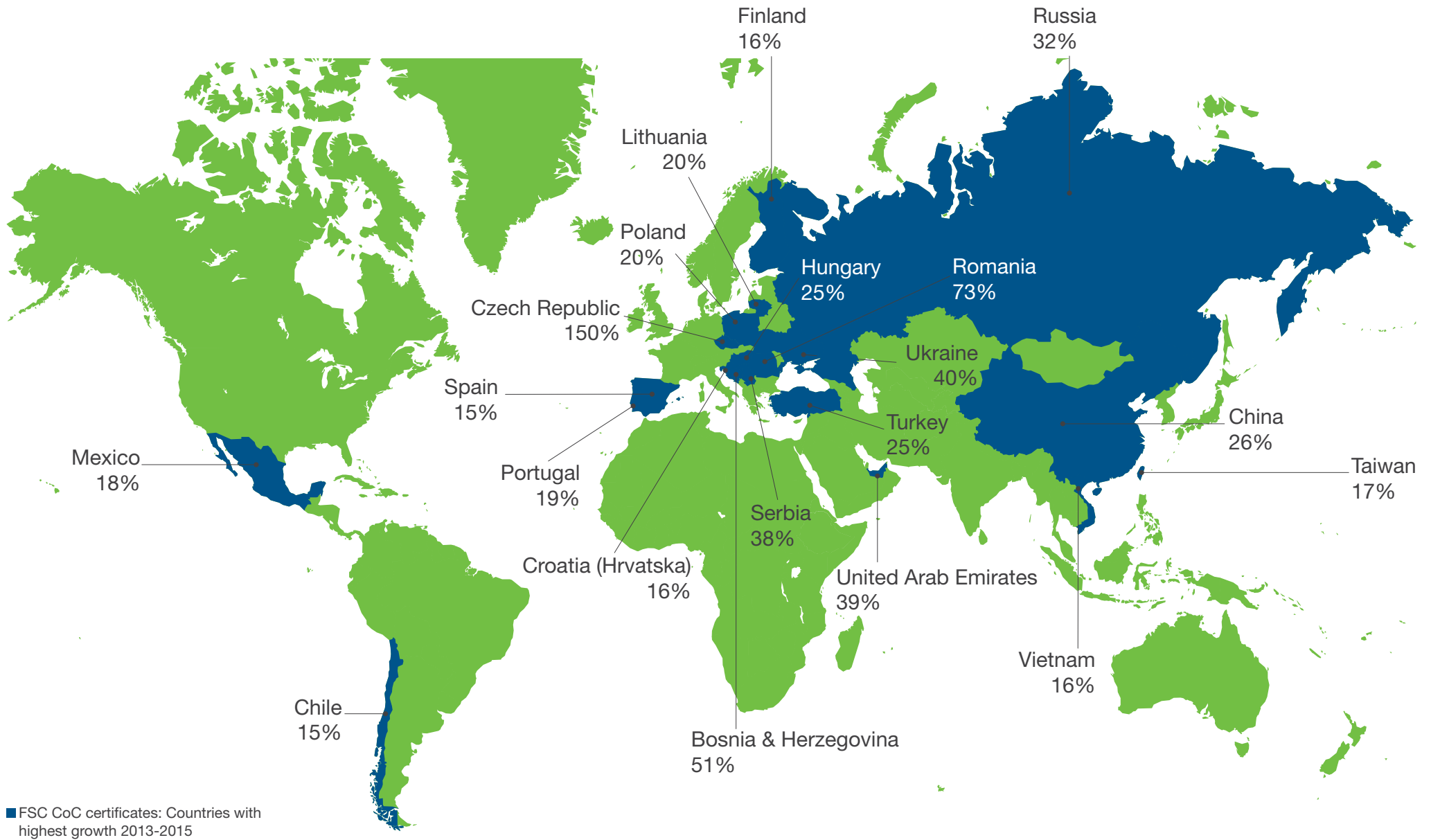
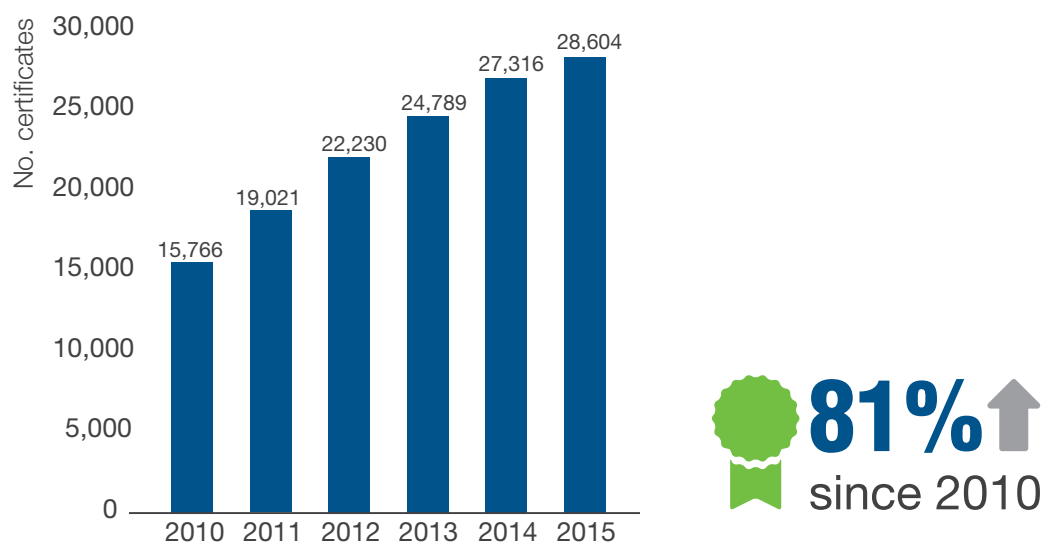


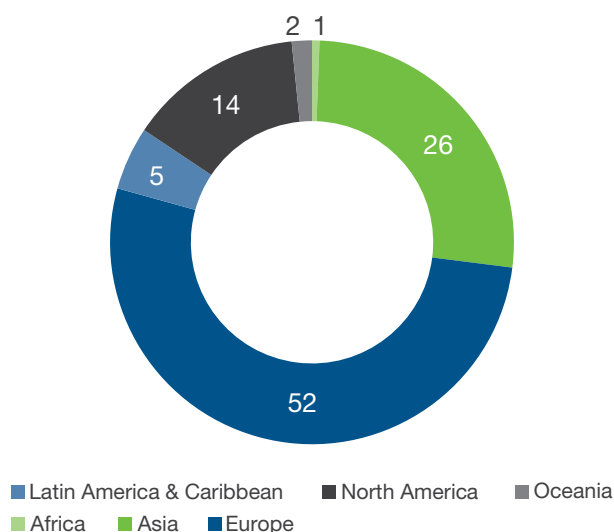
Figure 6. Evolution of FSC CoC certificates, 2010–2015



Source: FSC Certificate Database, data from January 2010 to January 2015.

CoC certificate holders provide the link between responsible production and consumption of FSC-certified products. The number of CoC certificates increased from 15,766 globally in 2010 to 28,604 in January 2015, an increase of 81 percent.

Figure 7. Global distribution of FSC CoC certificates by region (%)



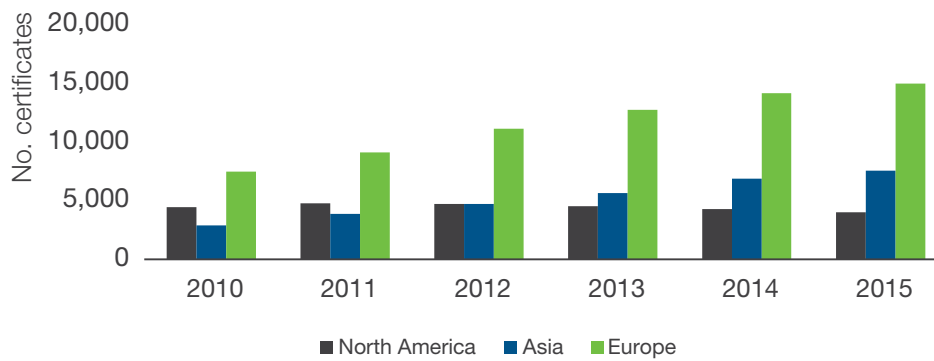
Source: FSC Certificate Database, data from January 2010 to January 2015.

The majority of FSC CoC certificates are concentrated in Europe with a total of 14,961, followed by Asia and North America with 7,553 and 4,008 certificates, respectively.

**Table 4. Evolution of FSC CoC certificates: Northern hemisphere, 2010-2015**

Region	2010	2011	2012	2013	2014	2015
North America	4,444	4,755	4,721	4,535	4,270	4,008
Asia	2,886	3,870	4,724	5,652	6,857	7,553
Europe	7,470	9,095	11,125	12,729	14,155	14,961

**Figure 8. Evolution of FSC CoC certificates: Northern hemisphere, 2010-2015**

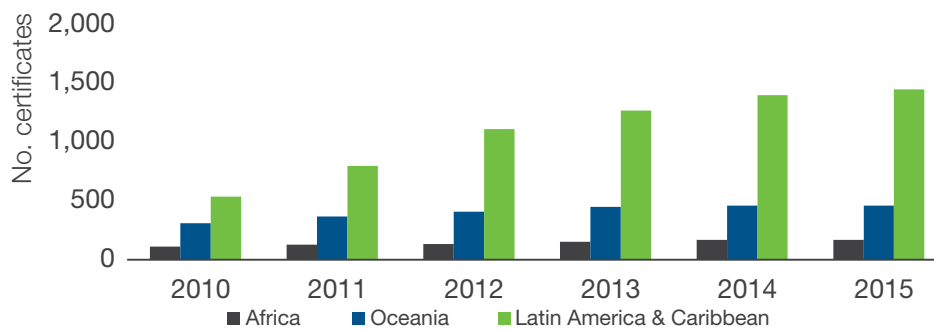


Source: FSC Certificate Database, data from January 2010 to January 2015.

**Table 5. Evolution of FSC CoC certificates: Southern hemisphere, 2010-2015**

Region	2010	2011	2012	2013	2014	2015
Africa	114	130	136	153	169	171
Oceania	313	370	410	450	463	461
Latin America & Caribbean	539	801	1,114	1,270	1,402	1,450

**Figure 9. Evolution of FSC CoC certificates: Southern hemisphere, 2010-2015**

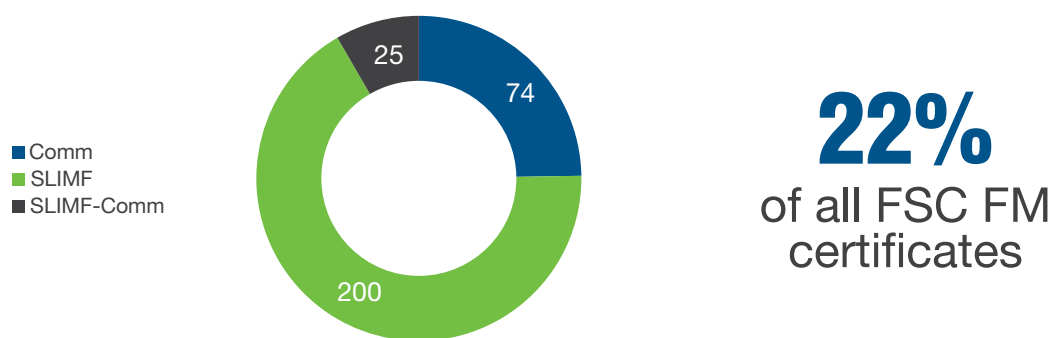


Source: FSC Certificate Database, data from January 2010 to January 2015.

## FSC SMALLHOLDERS<sup>11</sup>

Recognition and incorporation of indigenous peoples, small forest owners and forest-based communities (the groups collectively referred to within FSC as ‘Smallholders’) into FSC’s approaches is as old as FSC itself. This is because FSC fully embraces the role that smallholders play, as major stewards of the world’s forests, and as major suppliers of niche products in high demand on the market. FSC also recognizes that, in most cases, smallholders require assistance to connect to supply chains and market their products, as well as in attaining and maintaining certification. For this reason, FSC has continued to develop and improve approaches tailored to smallholders’ needs, and there have been increases in certified area and number of certificates.

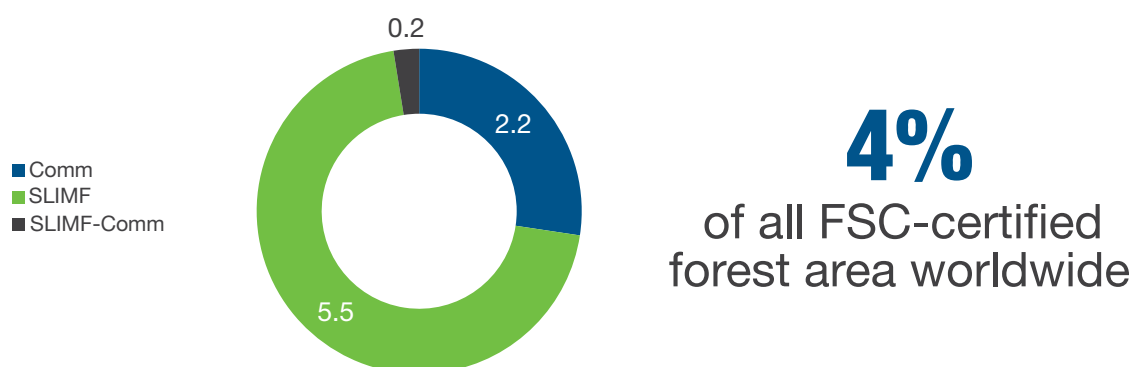
**Figure 10. Global FSC FM certificates held by smallholders (%)**



Source: FSC Certificate Database, June 2015.

In 2015, small and community producers hold 22 percent of FSC FM certificates worldwide, registering a 2 percent increase from 2014.

**Figure 11. Global FSC-certified area by smallholders (Mha)**

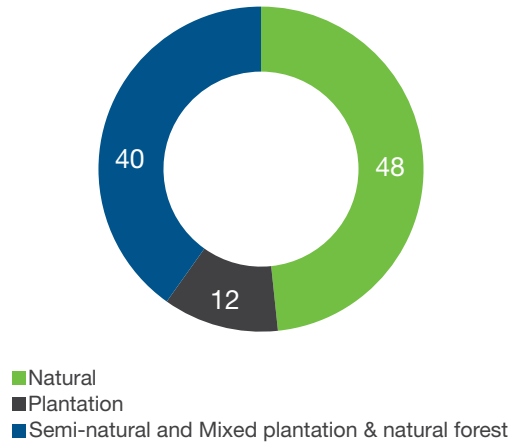


Source: FSC Certificate Database, June 2015.

In 2015, the FSC-certified area controlled by smallholders was 7.89 million hectares (4.3 percent of total FSC-certified forest area worldwide).

<sup>11</sup> Smallholders is the term used to describe those who own, manage or use forests which are considered ‘small’ in size and those who apply low-intensity harvesting practices to timber or non-timber forest products. Smallholders can also describe those who practice community forestry, where ownership and management are community controlled. SLIMF: Small or low-intensity managed forest; Comm: Community producers; SLIMF-Comm: Small, low-intensity and community forest operations.

Figure 12. FSC-certified smallholder area by forest type (%)



Source: FSC Certificate Database, June 2015.

Natural forest and semi-natural and mixed plantation as well as natural forest types dominate the SLIMF-certified areas at 3.7 Mha and 3 Mha, respectively.





# REASONS TO CHOOSE FSC

# TEN REASONS TO CHOOSE FSC

1

## WE'RE GOVERNED BY OUR MEMBERS

We're democratically governed, and over 800 social, economic and environmental members help us to set the right policies to protect the world's forests.

2

## WE HAVE THE HIGHEST STANDARDS

We set higher standards than any other timber certification scheme, which gives users the best assurance that certified forests are being managed responsibly.

3

## WE'RE RESPECTED AND CREDIBLE

We are the preferred certification scheme for business and the one most widely used by members of the Fortune 500.

4

## OUR IMPACT IS FAR-REACHING

Operating in over 100 markets, we issue more certificates globally than any other timber certification scheme.

5

## WE MAKE A POSITIVE IMPACT

Of any existing forest certification scheme, we provide the highest level of protection for endangered species and natural forests.

6

## WE HAVE INFLUENTIAL SUPPORT

Our membership includes the world's largest and most respected environmental NGO's such as Greenpeace and WWF, both of which are vocal in their support of FSC over others.

7

## WE'RE TRANSPARENT

Every process and decision we make is open to public review and our product claims are independently audited.

8

## OUR STANDARDS ARE THE SAME, THE WORLD OVER

Wherever we operate in the world, our standards are based on the same principles and criteria.

9

## WE THINK LOCAL

Every FSC forest certification process is open to local consultation so the people who live there can always have their say.

10

## WE'RE RECOGNIZED

FSC is the only timber certification scheme recognised by LEED Green Building Certification and is a member of ISEAL Alliance, the global association for sustainability standards.

## FSC IMPACTS<sup>12</sup>

FSC certification has positive impacts in communities, companies and forests around the world.<sup>13</sup>



**Helped to provide greater market access**  
*It's easier than ever before to source FSC-certified products*



**Reduced social conflict in and around certified forests**  
*What is the role for forest certification in improving relationships between logging companies and communities? Lessons from FSC in Cameroon*



**Helped to secure land tenure and use rights in certified forests**  
*Mpingo Conservation and Development Initiative celebrates 10 years supporting communities in sustainable forest management*



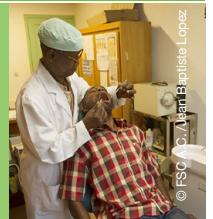
**Helped to improve the image of the forest industry locally and in associated markets**  
*From thinning to winning: A model of responsible forest management*



**Contributed to biodiversity conservation by caring for high conservation values and set-aside areas**  
*Great apes and logging*



**Improved conditions for workers in certified forests**  
*FSC certification leads to better conditions for the people of the Congo Basin*



<sup>12</sup> Source: Karmann, M. and Smith, A. (Eds), 2009. FSC reflected in scientific and professional literature: Literature study on the outcomes and impacts of FSC certification. FSC Policy Series No. 2009 – P001. FSC, Bonn, Germany. Also available at: <https://ic.fsc.org/download.fsc-reflected-in-scientific-and-professional-literature-literature-study.a-384.pdf> (accessed 15 June 2015).

<sup>13</sup> Online version offers direct links to stories.

## THE STRENGTH OF THE FSC BRAND

Research has shown that FSC certification can bring improved market access, higher revenues and enhanced public image.<sup>14</sup>

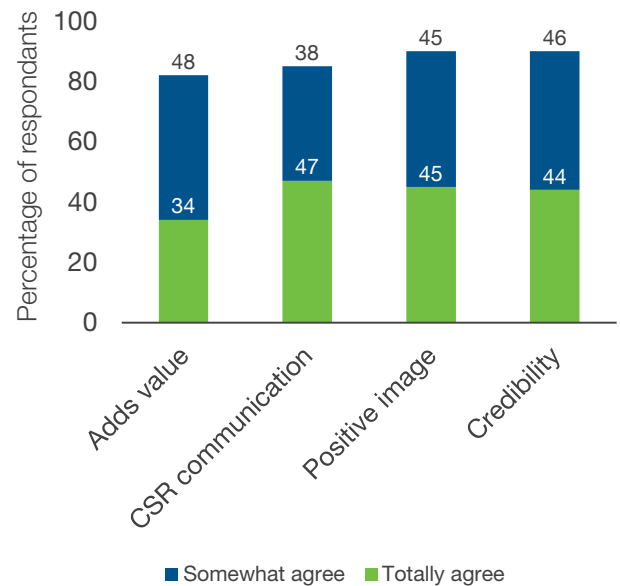
The FSC Global Market Survey is carried out every two years, and aims to seek the views of certificate holders and obtain market information to guide FSC's strategic development. During June and July 2014, some 3,656 FSC certificate holders from 95 countries completed the survey. They represent 13 percent of all certificate holders. For the full report, please visit <http://ic.fsc.org/gms>.



<sup>14</sup> Source: Cashore, B., Gale, F., Meidinger, E. and Newsom, D. (Eds), 2006. Confronting sustainability: Forest certification in developing and transitioning countries. Yale School of Forestry and Environmental Studies Publication Series Report No. 8. Yale Publishing Services Center, New Haven, CT, USA

## BRAND STRENGTH: THE 2014 GLOBAL MARKET SURVEY

**Figure 13. Positive responses to survey questions<sup>†</sup> (%)**



Source: FSC Global Market Survey Report, 2014.

<sup>†</sup> Survey question: Please indicate your level of agreement with each of the following statements about FSC and FSC certification: The FSC label adds value to our products; FSC helps us communicate our corporate social responsibility (CSR) initiatives; FSC certification helps to create a positive corporate image; FSC is a credible organization.

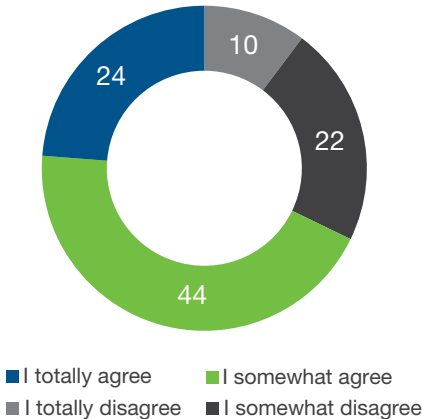
Key results of the 2014 global market survey have shown:

- 82 percent of FSC certificate holders said that the FSC label adds value to the products
- 85 percent of certificate holders said that FSC helps them communicate their corporate social responsibility strategy
- 90 percent of certificate holders said that FSC certification helps create a positive corporate image.

**Increasing consumer awareness**

According to FSC’s certificate holders, consumer awareness of the FSC label is increasing.

**Figure 14. Certificate holders’ perception of consumer awareness of FSC label (%)†**



† Survey question: Consumer awareness of the FSC label is increasing.  
Source: FSC Global Market Survey Report, 2014.

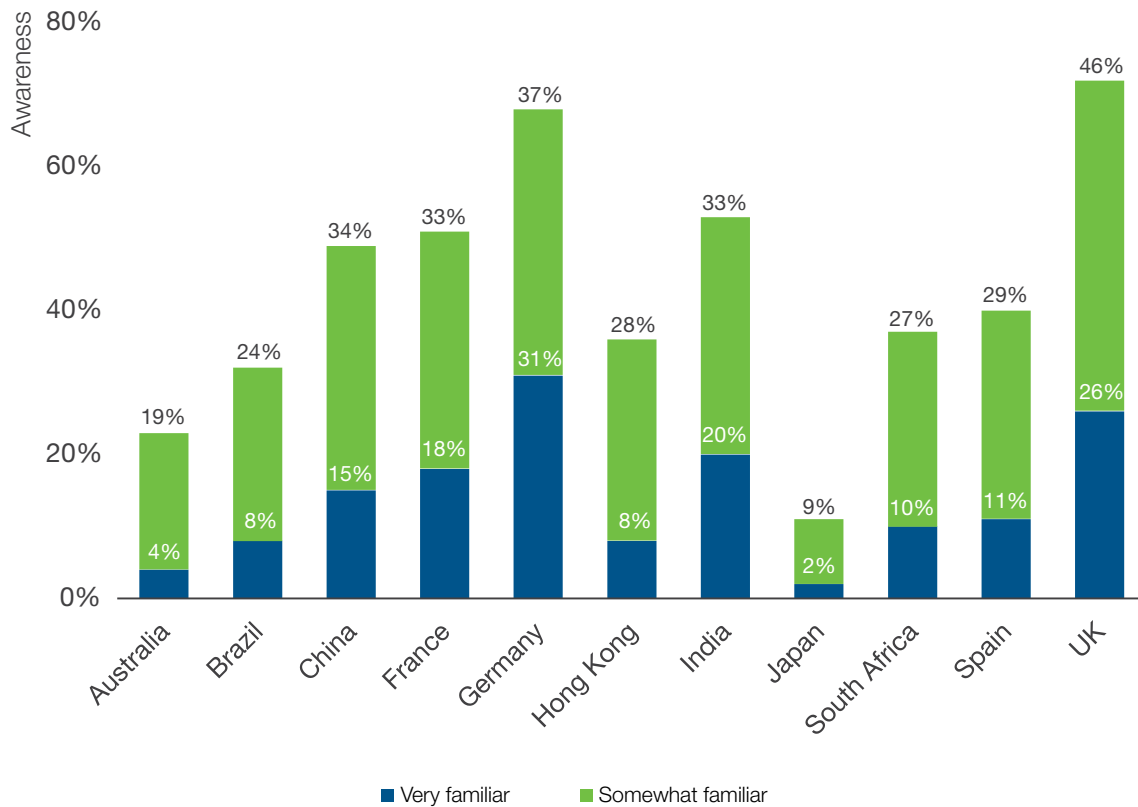
In total, 68 percent of certificate holders believed that customer awareness of the FSC label is increasing.



**CONSUMER DEMAND DRIVES SUSTAINABILITY**

Over the last 20 years, FSC has seen substantial growth in the number of certificates issued in both FM and CoC, as well as the number of products globally bearing the FSC label. Market research by FSC has shown that consumer awareness of environmental issues has grown rapidly in recent years. The organization believes that there is an emerging opportunity to promote sustainable forestry by helping consumers to better understand the link from forest to product and the vital role that they play in driving sustainability with their everyday purchasing decisions. Success in cultivating an active consumer base would help complete the economic circle and send clear market signals along the value chain. ▶

Figure 15. Consumer awareness of the FSC label<sup>15</sup>



Source: FSC/GfK Global Consumer Brand Positioning, September 2013.

► With certificates issued in over 100 markets in 2015, and millions of products carrying the FSC label, FSC has seen an increase in consumer awareness concerning its label. FSC International commissioned an online survey of over 9,000 consumers across 11 developed and emerging markets (Australia, Brazil, China, France, Germany, Hong Kong, India, Japan, South Africa, Spain and the United Kingdom) to understand consumer segmentation, barriers to being 'green' (ecologically responsible), perceptions of environmental issues and how these influence consumer behavior. The process included testing different concepts and FSC-related messages to identify the most compelling aspects of the FSC story and how to tell these in a manner that resonates with mainstream consumers.



<sup>15</sup> Survey methodology: data for this study were collected 12–19 September 2013 via online interviews sourced from opt-in online panels. Respondents were also screened to meet the following qualifications: pre-determined age group (21–64), gender mix (male 35%, female 65%), income threshold and POV (point-of-view), such as green behavior (those respondents cynical of environmental issues were excluded).

## FSC'S MARKETING TOOLKIT – A VALUABLE TOOL FOR LICENSE HOLDERS

Through the research process, FSC identified a global brand positioning and key messages that could resonate and be used consistently across markets.

However, FSC also recognized the need to help make messaging locality sensitive and has identified the environmental issues most relevant to consumers in various countries. This aspect is of added value to businesses in their CSR communications, as proximity determines what is most relevant and pressing for people.

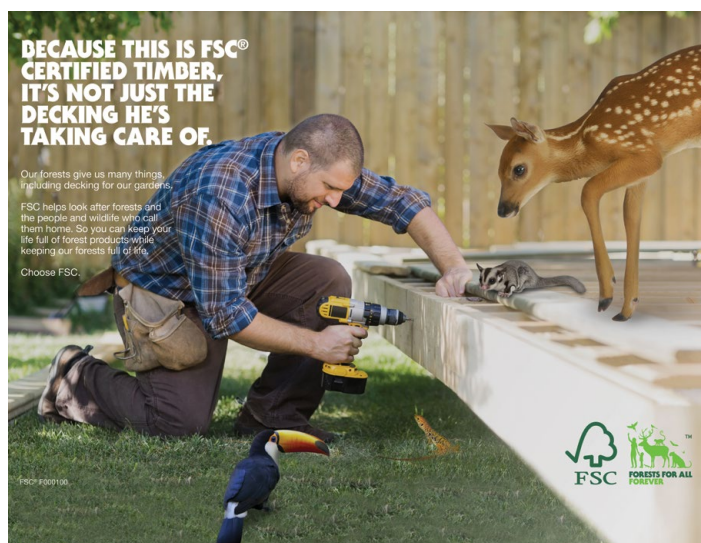
The assets available via an online platform ([marketingtoolkit.fsc.org](http://marketingtoolkit.fsc.org)) include:

- the FSC brand strategy and guidelines
- a messaging grid (comprising global and local key messages)
- a social media strategy
- a campaign activation plan
- metrics to measure the success of a campaign
- and a set of ready-to-use downloadable creative materials (print, online and point-of-sale advertisements).

These multiple brand 'touch points' allow FSC stakeholders to customize the consumer's journey to place sustainability at the forefront of their mind. They are also tailored separately for each of the major categories of FSC products – paper and tissue, print and publishing, packaging, construction and home improvement, and furniture. FSC stakeholders can use these downloadable assets as they are or adapt them to their marketing and communications needs by incorporating their own brand and messaging.



FSC has made the Marketing Toolkit available to all license holders. FSC network partners will work with their local license holders, offering support, when needed, in terms of bespoke campaigns.





A key driver of the FSC Global Brand Positioning project is the consumer research that shows that certification schemes, such as FSC, are trusted more by consumers than are business CSR communications. The online Marketing Toolkit platform not only provides research-based sustainability tools to help tell the FSC story effectively to mainstream consumers, but these also carry the much needed credibility of the FSC label.



**WHEN YOU CHOOSE FSC®, YOU'RE HELPING TO LOOK AFTER OUR FORESTS.**

**FIND OUT MORE.**

Visit <http://ic.fsc.org>



FSC® F000100

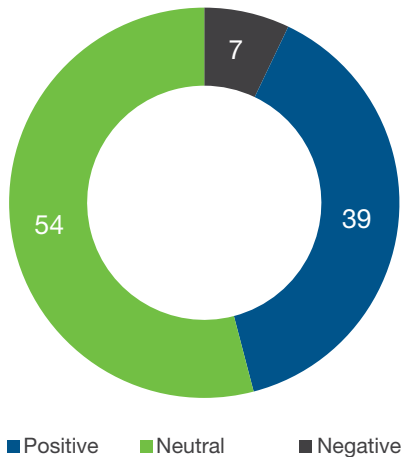
**FSC – A STRONG VOICE IN THE MEDIA**

FSC is increasingly present in the media, with a large proportion of reports being positive.

**Media tone**

The vast majority (93 percent) of media articles that referenced FSC were either positive or neutral (Figure 16) (i.e. 7 percent negative). It is not unusual for certain media to take a neutral stance on an issue, and their neutral stance is far more beneficial to FSC than those who take a negative tone toward FSC and other environmental issues.

**Figure 16. Media articles by tone of reference to FSC (%)**



Source: Online Media Clipping Analysis, January to June 2015.

**International relevance and coverage**

- Over 25,000 news items mentioned FSC International in January–June 2015.
- Articles appeared in over 100 countries.
- High readership/circulation sources included *BBC News* online, *Times of India*, *El Economista*, *New York Times*, *The Guardian* and *The Huffington Post*.

**FSC awareness on social media<sup>16</sup>**

- FSC International has 28,269 Facebook followers.
- FSC International has 10,400 followers on Twitter.

<sup>16</sup> As of June 2015.

## COMMITMENTS TO FSC

IKEA Group

IKEA Group has a goal to become forest positive by 2020, which means going beyond our own supply chain. We want responsible forest management to be the norm, not just in the forests we use for our own products. Our target is to source at least **50%** of our wood from more sustainable sources, currently defined as **Forest Stewardship Council certified** or recycled, by August 2017, and **100%** by August 2020.

Kingfisher

B&Q UK has a goal to have **100%** of timber products from proven well-managed sources. A new sandpaper range, certified to **FSC standards**, is hitting the shelves. B&Q UK customers can be confident that any paper products they buy are responsibly sourced.

L'ORÉAL

In accordance with its strong commitments to Sustainable Packaging, L'Oréal follows a strict eco-design policy, including for all paper and cardboard packaging to be sourced from sustainably managed forests. In 2014, more than **97.9%** of its paper and cardboard packaging came from certified forests, of which **80%** from **FSC (Forest Stewardship Council)** certified forests.

M&S  
EST. 1884

In 2014/15, **98%** of the wood-based materials we used were **Forest Stewardship Council (FSC) certified**, recycled or from sources that protect forests and communities (last year: 96%). By 2020 all our wood will come from the most sustainable sources, including FSC-certified and recycled material. Where certified or recycled sources are not available we will work with our suppliers to make sure our responsible sourcing standards are met.



During 2014, Tetra Pak delivered almost **44 billion FSC-labeled** packages to customers worldwide, 38 percent higher than 2013. Furthermore, it has produced more than **130 billion** labeled packages since the first one back in 2007.



# FSC IN MARKETS



# FSC IN MARKETS

## FSC SECTOR UPDATES

### FSC SECTORAL TRENDS<sup>17</sup>



#### Construction

Wood is a wonderful building material with various benefits – it is beautiful to look at, easy to work with, renewable, recyclable, carbon-efficient, low-

energy and high-performance. When planning the use of materials for construction, ensuring that the materials used fulfill the physical requirements of the project is self-evident. Choosing FSC-certified materials helps in communicating the responsibility aspect of a building project, and also gives the possibility to apply for FSC project certification.

The construction of buildings complying with the standards of various green building schemes has boomed in recent years and proved to be an important driver for FSC certification.

Ratings systems such as the USA's Leadership in Energy and Environmental Design (LEED) and the UK's Building Research Establishment's Environmental Assessment Method provide credits – and thus, market incentives – for FSC-certified products.

<sup>17</sup> Source: FSC, 2013. Choose FSC® certified wood and paper: Discover the benefits for your business. Section: Sector benefits. <http://benefitsforbusiness.fsc.org/sector-benefits.3.htm> (accessed 20 February 2015).



#### Retail

Worldwide, increasing numbers of retailers are choosing FSC-certified products as part of their portfolio. As more retailers sign up, consumers and

suppliers become increasingly aware of the benefits of FSC-certified products. Ultimately, more forest resources are certified.

By committing to sell responsibly sourced timber, packaging and paper, retailers gain a reputational benefit for themselves, and can also win new business as governments and large procurers impose minimum standards on suppliers they buy from.

FSC offers retailers trademark service and guidance in the use of the FSC logo in the promotion of FSC-certified products.



#### Paper and packaging

The paper and packaging sectors require large amounts of wood-based materials in their operations. The paper industry uses approximately 11

percent of all the wood extracted around the world.

There is continuous worldwide demand for virgin wood fiber to produce paper and board – even when recycled materials are being used. To ensure adequate wood supply in the future, responsible forest management is essential.

Through its high standards of responsible forestry, FSC ensures an economically viable and constant flow of timber for the industry, while maintaining forest biodiversity and securing the rights of forest communities and Indigenous Peoples.

The FSC label is a clearly recognizable logo that packaging producers can pass on to their customers – often large retailers – and, ultimately, to the consumer.

While paper and board items can easily be recycled, FSC also has a specific ‘FSC Recycled’ label to show when they have been made from already recycled content.

FSC has produced a report to explain these benefits to its stakeholders and their business partners.

With sector-specific information, case studies from leading companies, fun facts, infographics, examples of impacts and much more, it is a resource to showcase the value of FSC certification.

For further information, please visit <http://benefitsforbusiness.fsc.org>.



© FSC Netherlands  
Project 100hoog in Rotterdam,  
The Netherlands

## FSC MARKET TRENDS AND INNOVATION

### FSC in fashion

Given the current economy, the textiles industry is facing increasing pressure from civil society organizations on environmental and social concerns. In this context, the demand for textiles made from tree cellulose fibers is growing. Natural rubber and cork are also increasingly used for footwear and accessories.

Initiatives such as 'Fashion Loved by Forests' by the NGO Canopy involve leading fashion brands such as Inditex (owner of, e.g., Zara), H&M, Stella McCartney, C&A, Quicksilver Roxy and Eileen Fisher, and consider FSC to be the only international certification scheme recognized as a measure of ecologically sustainable logging.

From paper bags and product catalogs, to shoes made from rubber and garments from forest-based fibers, many fashion brands are looking into producing more of these products from FSC-certified sources.



## **FSC in finances**

Securing the responsible origin of wood products and management of the world's forests is also an important matter for companies not directly involved in the supply chain of forest products.

One of the fields in which FSC is growing in importance is the financial sector. The strengths of FSC certification – independent third-party verification of meeting the social, environmental and economic standards of FSC – help to reduce some of the risks of financial investment.

There is a growing awareness amongst financial institutions, such as banks, credit unions and investment banks, about the need to avoid unacceptable impacts in the forestry sector. Requiring their customers to have FSC certification can help financial institutions ensure and communicate that the financed operations are in line with responsible forest management practices. For example, HSBC is exploring opportunities together with FSC on how to support responsible forestry and FSC certification on the ground, and includes certification as requirement for customers in related sectors. FSC is an effective tool for gaining assurance on crucial aspects of investments in forests such as traceability and legality.

## **FSC in sports**

The use and awareness of FSC-certified materials is growing for both sporting events and the products used in sports. Construction materials for major sporting events such as the football (soccer) World Cup and the Olympics often follow strict procurement policies specifying FSC certification as a prerequisite for wood-based materials used on construction sites.

For example, in London 2012 more than two thirds of the timber used in the construction of the Olympic Park was FSC certified. For the Athletes' Village, FSC material made up over 98 percent of the timber content.

All of the wood used in permanent or temporary constructions for Rio 2016™ must come from legal and responsible sources.

At the same time, more and more consumer products in sports are FSC certified as well. From footballs (soccer balls) to volleyballs made of latex, from gym flooring to table-tennis paddles and baseball bats made of wood – all already being produced with FSC-certified materials.



# FSC TOOLS AND SERVICES

# FSC TOOLS AND SERVICES

<b>FSC Marketplace</b>	<p>The business-to-business online platform connects sellers and buyers of FSC-certified materials and products. Each FSC certificate holder has a free company profile – including sales contacts and product pictures and descriptions. Uncertified businesses can freely browse among thousands of FSC companies and quickly find verified FSC-certified products.</p>	
	<p>A website to welcome and introduce new FSC certificate holders to the FSC system. It provides easy access to relevant FSC background information and key documents, and features important FSC services and projects.</p>	<b>Certificate Holders' Welcome Kit</b>
<b>FSC Trademark Portal</b>	<p>The portal includes the FSC label generator, promotional panel generator and a collection of related resources such as requirements and guides.</p>	
	<p>The document presents the evolution and current state of FSC certification, as well as an overview of sectors and recent market trends. It includes figures and statistics on FSC growth, consumer recognition, etc.</p>	<b>Market Info Pack</b>

<p><b>Market News</b></p>	<p>FSC showcases its outstanding market achievements in the FSC newsletter and newsroom to a wide audience.</p>	
	<p>The online training course is available through certification bodies and FSC network partners.</p>	<p><b>FSC Trademark training course for FSC certificate holders</b></p>
<p><b>Trademark Service Provider (TSP) Network</b></p>	<p>This list includes the details of the TSPs in charge of issuing trademark licenses to certificate holder clients. TSPs are usually FSC national offices and FSC regional offices issuing licenses and approving promotional use of FSC trademarks in their national/ regional territories.</p>	
	<p>The website is used to promote the FSC small and community label option (SCLO) to consumers.</p>	<p><b>Made with Heart campaign website</b></p>
<p><b>Small and Community Label Option (SCLO) website and campaign assets</b></p>	<p>The website is targeted at retailers interested in promoting small and community producers via an in-store campaign.</p>	

<p><b>Events module</b></p>	<p>The events section on the FSC website has information on current and upcoming events.</p>	
	<p>The web page carries key announcements concerning events.</p>	<p><b>Events newsfeed</b></p>
<p><b>Smallholder Fund</b></p>	<p>The Smallholder Fund is a project-bound small grant scheme. It was created to improve smallholders' capacity to achieve and maintain FSC certification, to strengthen their ability to benefit from the FSC system, and to increase the supply of FSC-certified materials.</p>	
	<p>The goal of the program is to develop robust training programs that build the capacity of the FSC network to respond to the training needs of small and community producers in their countries and regions.</p>	<p><b>Train the Trainers program</b></p>
<p><b>FSC Marketing Toolkit</b></p>	<p>The website has a set of campaign materials for communicating about FSC across a wide range of channels, including social media, print, pack and point of sale. License holders are also able to create their own bespoke campaigns.</p>	

	<p>The reports aim to increase the understanding of the complex impacts of FSC programs. FSC needs to assess its effectiveness in delivering its mission. The reports help to develop a transparent, impartial and consistent evaluation.</p>	<p><b>FSC monitoring and evaluation reports</b></p>
<p><b>ForCES – Forest Certification for Ecosystem Services</b></p>	<p>The project examines the changes needed for the FSC system to become a global leader in the certification of ecosystem services over a four-year period.</p>	
	<p>FSC is present in numerous regions and countries around the world. The web page 'FSC Worldwide' provides regional representatives' contact details.</p>	<p><b>FSC Worldwide</b></p>
<p><b>Benefits for Business website</b></p>	<p>The web tool contains information on economic, environmental and social benefits of FSC-certified materials. The facts and figures focus on the following sectors: construction, packaging, retail, and paper and publishing.</p>	



**FSC International official website**

<http://ic.fsc.org>





FSC Global Development GmbH  
Charles de Gaulle Strasse 5  
53113 Bonn, Germany  
T +49 (0) 228 367 660  
F +49 (0) 228 367 66 30  
<http://ic.fsc.org>

FSC® F000100  
Copyright © 2015 FSC G.D. All rights reserved.