bosberichten
2017 #3

Dutch sustainably sourced timber consumption grows to 83% in a decade

Significant effort has been applied since the 1990s to make sustainably sourced material a dominant factor in the Dutch timber market. But the hard work of many dedicated people has paid off. Latest data from 2015 show sustainably sourced timber's share of Dutch sawn goods and wood based panels consumption at 83.3% and 65.4% in the paper and paper-board business. That compares to just 13.3% and 0.5% a decade earlier.

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Consistent source approach monitoring

These figures come from Probos's most recent sustainably sourced timber market study, its fifth in ten years. It was undertaken, in line with the previous studies, using the "source approach". This means that volumes of certified wood were determined as they entered the Dutch market. It's a comprehensive market share analysis, with every Dutch producer of timber, paper and/or paperboard approached for data, as well as all importers of sawnwood, wood based panels, paper and paperboard. The market share figures in the study can't be linked directly to the end user, but the consistent approach of Probos's five studies to date means data is comparable and year-on-year trends can be identified.

Table 1 The total volume of FSC and PEFC certified sawnwood and wood based panels on the Dutch market in 2013 and 2015 (in m³ RWE).

	FSC	PEFC	Total certified	Total market*	Certfied as % of total market
2015	**2,458,000**	**2,027,000**	**4,485,000**	**5,386,000**	**83.3%**
2013	2,057,000	1,784,000	3,841,000	5,052,000	76.0%

* The figures for the "total market" are based on the annual Probos/CBS production and trade statistics for timber- and paper products, and are the apparent consumption in the period mentioned.

Defining sustainably sourced

The study's definition of sustainably sourced timber is material that complies with the sustainability criteria of Dutch government procurement policy. This means timber certified under FSC® and PEFC schemes and also, for the first time in 2015, the Malaysian Timber Certification Scheme (MTCS). All are now accepted under Dutch procurement policy as demonstrable proof of sustainability and, to make the study comparable with the 2013 edition, market shares for that year are recalculated to include MTCS certified timber.

Growth continues

In 2015, a total of almost 4.5 million m^3 of certified roundwood equivalent(RWE[1]) timber and wood based panels was placed on the Dutch market, so 83.3% of its total sawn- and plywood consumption (see Table 1). That puts sustainably sourced timber's market share up over 7 percentage points (p.p.) on 2013's figure of 76.0%. This growth is similar to that between 2011 and 2013 and takes the total volume rise in sustainably sourced timber consumption between 2005 and 2015 to 3.6 million m^3 RWE.

Growth across product groups

All product groups in the latest report display growth in sustainably sourced percentage share. Temperate hardwood saw the biggest rise by far, from 20.7% to 33.7% (see Fig. 1). But this still leaves it lagging behind other product groups in terms of total share. The most likely cause of this lies with the packaging industry, which uses significant amounts of temperate hardwood, but very little sustainably sourced. Market share in softwood has increased to 85.4%, which puts it back up to 2011 levels, while the sustainably sourced share of tropical sawn hardwood has increased 6.8 p.p. to 63.3%. The wood based panel sector shows growth again as well, up 7.2 p.p. to 88.2%, and this follows a dramatic 28.8 p.p. rise between 2011 and 2013.

Malaysia key to tropical sawn hardwood

As in 2013, Malaysia remains the Dutch market's most important country of origin in terms of total tropical sawn hardwood import volume. In fact, its share increased from 32% in 2013 to 36% in 2015. Next comes Cameroon with 19%, with Gabon a significant supplier too at 14%. Almost half of sustainably sourced tropical sawn hardwood originates from Malaysia, with 47% share, mainly PEFC-certified. Some way behind come Cameroon at 13%, Gabon 10% and Indonesia 9%.

FSC and PEFC share split constant

In 2015, 55% by volume of sustainably sourced timber and wood based panels placed on the Dutch market was FSC certified, the rest PEFC certified. This is a similar ratio to 2013, so acceptance of MTCS-certified material as sustainably sourced within Dutch procurement policy has not altered the balance. The share of total Dutch wood consumption taken by timber certified under the schemes is 40.9% for FSC and 33.1% for PEFC.

Paper and paperboard performance

The total of sustainably sourced paper and paperboard placed on the Dutch market in 2015 was 1,739,500 tonnes. Given overall consumption of 2,651,000 tonnes, that amounts to a market share of 65.6%,

1 RWE: a roundwood equivalent is the amount of roundwood needed to make a certain amount of a product.

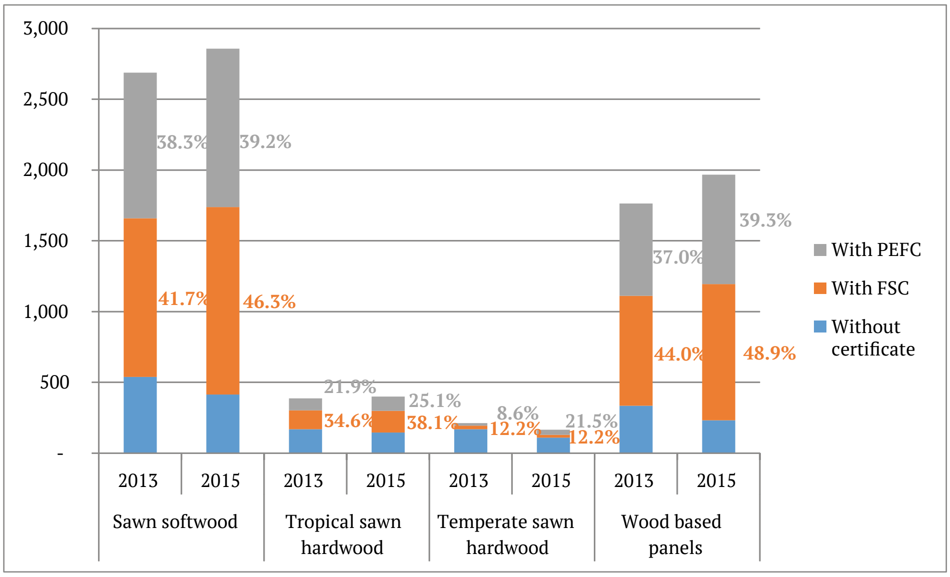

Figure 1 Total consumption of sawnwood and wood based panels (in 1,000 m³ RWE) and the shares of FSC and PEFC within the total consumption, 2013 and 2015.

divided 52.6% FSC and 13.0% PEFC (Table 2). Figure 3 shows the market share of sustainably sourced paper and paperboard by product group.

The numbers tell the tale

Probos first studied the Dutch market share of sustainably sourced timber on behalf of the government in 2006. To test the impact of Dutch procurement policy, it was asked to undertake a baseline measurement to ascertain whether timber from certified forests was also placed on the market without a certificate. At that time, Chain of Custody (CoC) certification was not widely implemented. But with a total now in excess of 4,500, the Netherlands has the highest density of CoC certified companies per capita globally.

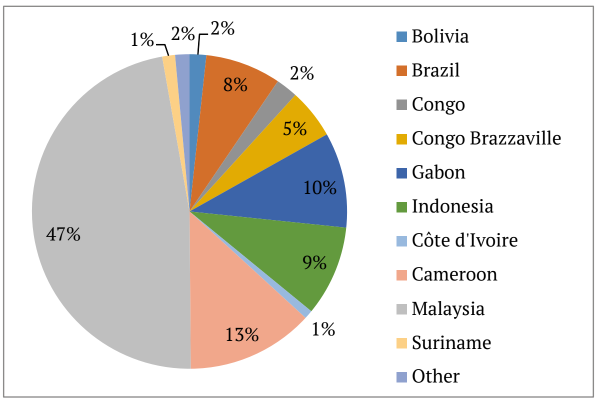

Figure 2 Countries of origin for tropical sawn hardwood with a certificate for sustainable forest management in 2015.

The results of the first and subsequent studies were used to develop initiatives to help increase the country's sustainably sourced timber market share. In fact, accurate market intelligence forms the basis of its growth. The data contributed to overall transparency, identifying which industries/sectors performed well and which did not. Consequently, efforts to improve the situation could be targeted, for instance with actions developed to boost sustainably sourced timber uptake in construction and packaging industries. Data itself was not the goal, but a tool to increase sustainably sourced timber market share of trade flows and, in turn, stimulate sustainable forest management.

Combined stakeholder effort

That the Dutch market now has the highest market share of sustainably sourced timber worldwide is thanks to cooperation; to the joint efforts of NGOs, governments, certification schemes and the forest and timber industry. Pressure from NGOs, awareness raising campaigns, the code of conduct introduced in 2004 and multiple policy plans from the Netherlands Timber Trade Association (NTTA) have all made significant contributions to this achievement. Credit too must go to the covenants and partnerships individual companies have agreed with certification schemes and to the government timber procurement policy, including policies introduced to facilitate it. The latter helped prepare the market for sustainably sourced timber and simultaneously made it easy for procurement officers to comply with the policy.

Other initiatives also contributed to the Netherlands' current strong performance on sustainably sourced timber. They included the development of standard contract clauses, a help desk, training and website for procurement officers. There was also the development of the www.houtdatabase.nl website. This provides technical and supplier data on 200 types of timber and wood panels, all with government procurement-aligned sustainability certification. This has also been underpinned with pilot projects in the use of lesser-known timber species.

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Table 2 The total volume of paper and paperboard certified as coming from sustainable forest management that was brought onto the Dutch market in 2015 and 2013 (in tons).

		FSC	PEFC	Total	in %
Totaal	**Total market 2015***			**2,651,000**	
	With certificate 2015	**1,395,300**	**344,200**	**1,739,500**	**65.6%**
	Total market 2013			2,755,000	
	With certificate 2013	1,038,900	258,100	1,297,400	47.1%

* The figures for the "total market" are based on the annual Probos/CBS production and trade statistics for timber- and paper products, and are the apparent consumption in the period mentioned.

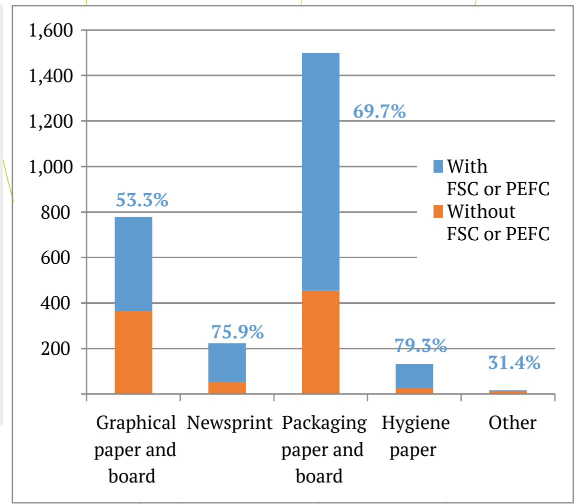

Figure 3 Quantities of paper and paperboard (1,000 tons) on the Dutch market in 2015 by product group and market shares of FSC and PEFC certified paper and paperboard within each product group.

And all the above were supported by the Dutch government.

Not there yet

All this sounds as if we in the Netherlands are nearly there when it comes to sustainable timber sourcing. If only that were true. In fact so far only the low hanging fruit has been harvested. There is need for even more demanding procurement practices, in both public and private sectors to verify that policies are met. The Dutch timber sector itself also has a further role to play. For example, it wants to compete more strongly with other materials industries by using comparative life cycle analyses (LCAs). The results of these for timber are in general very positive (see www.europeansttc.com/environment) but only if the timber is sustainably sourced. The timber trade also faces the challenge of getting more difficult timber flows, such as those of tropical or temperate hardwood from the likes of Romania, the Balkan states, Belarus and Ukraine, to 100% certified sustainability. So strong, market-driven impetus remains essential.

It is also important to appreciate that timber flows have changed in past decades. Partly due to the recent economic crisis and the rise of alternative materials, consumption of tropical timber products has decreased tremendously, both in the Netherlands and other European countries. In 2005 Dutch sawn tropical hardwood consumption was 730,000 m^3 RWE. That compares with just 400,000 m^3 RWE today. Hence, Dutch influence in encouraging suppliers to adopt sustainable forest management policies has been strongly reduced, giving even more cause for international cooperation to make timber flows worldwide more sustainable, such as via the European Sustainable Tropical Timber Coalition (STTC).

Until we achieve 100% sustainably sourced timber market share, it remains critical for those with procurement responsibility to verify their demand for sustainable products is being met. It is also key for other countries intent on growing demand for sustainably sourced timber products to share in the Netherlands' experience. This is a great responsibility for both the Dutch government and business. Through cooperation and best practice exchange others can be helped to develop and promote their sustainably sourced timber markets and do so more quickly, without reinventing the wheel.

Probos would also like to see more focus in the marketplace and in market studies on processed wooden products, such as profiled timber goods, furniture and charcoal. The share of such sectors taken by sustainably sourced wood is much lower than for primary timber products. Probos is keen to contribute here, especially in terms of providing data and sharing methodology and best practice.

The next study, showing whether the Netherlands commitment to sustainably sourced timber has made further market impact and progress through 2017, is due out next year.

Jan Oldenburger and Mark van Benthem

The full report containing all results can be downloaded via: www.probos.nl (Dutch only)

Photo front page: freshly sawn Basralocus for the Dutch market (Photo: Mark van Benthem, Probos)