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Sustainable timber on the Dutch market in 2005

The Ministry of Housing, Spatial Planning and the Environment commissioned Probos to carry out a baseline measurement of the volume of sustainable timber on the Dutch market in 2005. Of the total volume of timber marketed in the Netherlands, 13.3% actually carried certification while an additional 23.1% originated from certified forests, but had no label. The results of the baseline measurement are presented in this timber report.

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Baseline measurement

Dutch environmental policy on timber aims to promote sustainable forest management around the world and substantially enlarge the market share of sustainable timber in the Netherlands. The focus of policy is on developing an independent certification scheme for sustainable timber (National assessment guideline or BRL), preventing illegal logging, and promoting sustainable procurement and tendering practices for timber.

In order to assess the effectiveness of its policy, the Dutch government needs to know how much sustainable timber is available on the Dutch market. To that end, the Ministry of Housing, Spatial Planning and the Environment commissioned Probos to carry out a baseline measurement in 2005.

The main purpose of the 2005 baseline measurement was to establish the volume of certified sustainable timber on the Dutch market, either imported or harvested in Dutch forests certified by the Forest Stewardship Council (FSC). The survey looked at the five main certification schemes and assessed the following product segments: roundwood products, sawn soft wood, sawn tropical and other hardwood, woodpanels, products, pulp and paper. Probos also assessed the volume of imported timber that originated from certified sustainable forests but lacked the accompanying certificate.

Method

Volumes of sustainable timber and paper products on the Dutch market in 2005 were calculated using the results of a postal survey of all timber importers, paper producers, paper importers and processing plants for domestic roundwood. Probos received assistance from various industry associations and FSC NederlandA total of 396 questionnaires were sent out, 237 of which were returned, a 60% response rate. Company visits were carried out to verify the data supplied.

In this study, sustainable timber was defined as: "timber and wood products (including pulp and paper) from forests certified by one of the following five forest certification schemes: FSC, Programme for the Endorsement of Forest Certification Schemes (PEFC), Canadian Standard Association (CSA), Sustainable Forestry Initiative (SFI) and the Malaysian Timber Certification Council (MTCC)." Within the volume of sustainable timber, Probos distinguished between timber carrying a certificate and timber which did not have a certificate but which could be shown to come from sustainably managed forest certified by one of the five certification schemes above. In the future, the BRL will lay down which certification schemes will be accepted in the Netherlands as providing adequate assurance of sustainable forest management. This could mean that schemes considered acceptable in this study may no longer qualify as such in the future. In that case it would be necessary to correct the percentage of certified sustainable timber as calculated in this study.

Figure 1. Timber with certificate and timber sourced from certified forest, per product group, as a percentage of total Dutch timber consumption in 2005

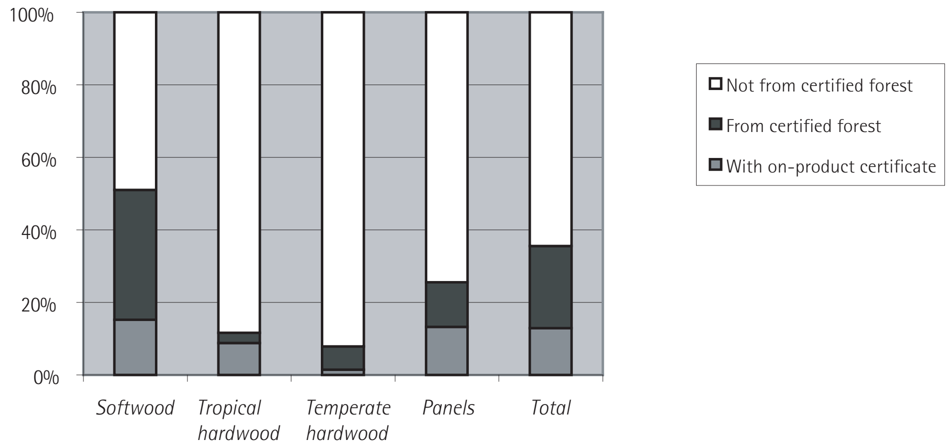


Table 1: Total volume of sustainable timber (sawn wood and panels) marketed in the Netherlands in 2005. A distinction is made between timber with its own certificate and timber without a certificate but sourced from a certified forest (in m3 RWE).

		FSC	PEFC	MTCC	CSA	SFI	Other*	Total	%
Total	Total market							6,327,178	
	With certificate	588,810	247,609	1,058	0	0	6,317	843,727	13.3%
	From certified forest	183,836	1,142,700	16,914	11,348	5,975	94,662	1,455,435	23.1%

*) The category 'other' consists of imported timber bearing the Keurhout mark (from various developed countries, and Gabon) and timber which was sourced from certified forests but for which no certification scheme was specified.

FSC most important on-product label

The total volume of roundwood equivalents (RWE) brought onto the Dutch market in 2005 and bearing a certificate of sustainability was 844,000 m3 (see table 1), or 13.3% of total Dutch consumption of timber products (excluding paper). The total volume of sustainable timber (both with and without a certificate) was 2,299,000 m3 RWE, or 36.4% of total consumption.

There were large differences between product segments in the proportion of timber (with or without a certificate) sourced from certified sustainable forests. For sawn softwood 53% of timber was sourced from sustainable forests, while this figure was less than 12% for both sawn tropical hardwood and sawn temperate hardwood (figure 1). Panels scored in the middle, with 26% from sustainable sources.

FSC is the largest certification scheme on the Dutch market for timber with an on-product certificate: 70% carries an FSClabel, followed by PEFC with a share of 29% (figure 2a). Of all timber originating from sustainable forests 60% originated from PEFC-certified forests and onethird from FSC-certified forests (figure 2b). The market share of FSC timber found in this survey (12.2%, see table 2) corresponds well with the results of a previous study by AIDEnvironment, commissioned by FSC Nederland (12.6%). PEFC's share is 22% , which percentage is strongly dominated by timber without a label. The other schemes participate in very small percentages.

Origin not always certain

During company visits, it became apparent that some businesses were uncertain about whether or not their timber was sourced from certified forest. Although they usually knew the timber's country of origin or the supplying sawmill , they could not say in which forest area the wood was harvested. A sawmill's Chain of Custody (CoC) certification was regarded by some timber traders as assurance that all timber supplied by the sawmill was certified or sourced from certified forests. But this is rarely how it works. Besides timber from certified sustainable forests, sawmills often also process timber from uncertified forests. The fact that timber was bought in Finland or Sweden does not necessarily mean it was harvested in a Finnish or Swedish forest, as these countries also import roundwood from the Russian Federation and the Baltic states.

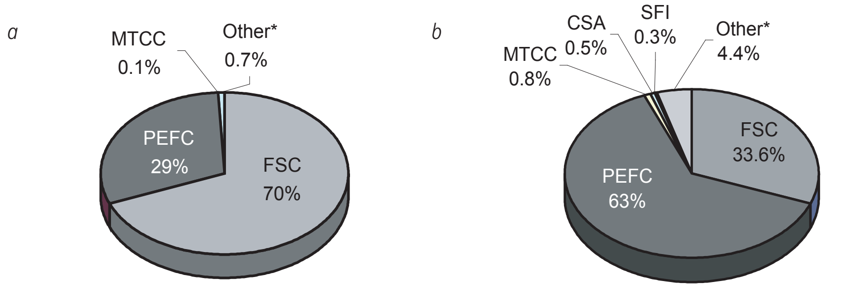
Half of the woodpulp from sustainable source

In 2005, Dutch paper producers affiliated with the Royal VNP (Netherlands' Paper and Board Association) processed 863,000 tonnes of wood pulp. Most wood pulp was imported, but some was produced in the Netherlands from roundwood and wood chips. Half of the total volume of wood pulp (433,000 tonnes) had a proven sustainable source (table 3). Manufacturers claimed that 88% of sustainable imported wood pulp was certified. As shown in figure 3, PEFC is the main certification scheme for the paper industry.

Market share FSC-paper 0.5%

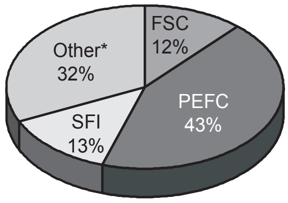
The total volume of FSC-certified paper on the Dutch market comprised both paper produced in the Netherlands and imported paper.
In 2005, Dutch paper producers produced a total of about 4000 tonnes of graphic paper bearing the FSC mark, 3300 tonnes of which was supplied to the Dutch market.
The majority of Dutch paper importers who responded to the survey did not have any information about their products' sources. The focus of the survey therefore shifted exclusively to the five Dutch FSC-CoC certified paper companies. In 2005, these businesses imported about 2000 tonnes of FSC-certified graphic paper for the Dutch market.

Figures 2 a and b. Breakdown of the Dutch market for sustainable timber, for timber with a certificate (a) and total volume of sustainable timber (b).



*) The category 'other' consists of imported timber bearing the Keurhout label (from various developed countries, and Gabon) and timber which was sourced from certified forests but for which no certification scheme was specified.

Figure 3. Breakdown for each of the forest certification schemes, of the total volume of sustainable pulp used by Dutch paper producers in 2005



*) The category 'other' consists of imported pulp which was sourced from certified forests but without specification of FSC and PEFC.

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Adding these two figures together, we find that the total volume of FSC-certified graphic paper marketed in the Netherlands in 2005 was 5300 tonnes. This is a very small proportion of the total volume of graphic paper (excluding newspaper) consumed in the Netherlands in 2005 (1,106,000 tonnes) (source: Statistics Netherlands (CBS), VNP). The market share of FSC certified graphic paper is thus a mere 0.5%.

Predicted consumption of certified timber in 2008

On the basis of the survey, it is impossible to draw any conclusions about importers' expectations as regards certified timber sales. What is certain, however, is that the volume of FSC timber will continue to grow, due to new voluntary agreements with different Dutch organizations in the building sector, growing demand and an expanding area of FSC-managed forests worldwide. The FSC-CoC certified businesses included in the Probos survey expect a growth of 10% in the volume of imported FSC timber in 2008.

It is doubtful whether the share of PEFC timber on the market of certified timber will grow. European PEFC forests produce large volumes of timber, but only a small volume is imported into the Netherlands with an accompanying certificate, and an even smaller part carries an on-product label when it reaches the end user. There are only a handful of PEFC-CoC certified businesses in the Netherlands. This certification scheme is used especially on the business-to-business market to provide assurance of sustainable timber sourcing, but the certificate is not otherwise used as a marketing tool.

The market share of certified sustainable timber-based raw material is already substantial and still growing. Dutch paper manufacturers expect that consumption of certified sustainable pulp will increase mainly by the expanding market share of FSC pulp. Of the five FSC-CoC certified importers in our study, two did not start up until the end of 2005. The importers expect to double their sales of FSC paper in 2008.

Conclusions

The baseline measurement taken by Probos gives reliable information about the market share of certified timber. Less reliable is the share of timber from certified forests without a certificate. Importers are not always able to confirm the origin in their administration. For sawn softwood already more than 50% of the market is sustainable. A major effort will be necessary, however, to lift the market share of sustainable tropical hardwood and sustainable temperate hardwood to the same level. Within the sawn softwoodmarket, major growth is still possible in the packaging and pallet industry, a largely untapped market for sustainable timber.

The industry associations will have to address, in the short term, the problem of proving that imported timber without a certificate was sourced from sustainably managed forests. The ability to document a product's origin is crucial if the industry is to meet its objectives. In 2007 the BRL will lay down which certification schemes will be accepted in the Netherlands as providing adequate assurance of sustainable forest management. This could mean that schemes considered acceptable in this study may no longer be qualified as such in the near future. In that case it would be necessary to correct the percentage of certified sustainable timber as calculated in this study.

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Table 2. Market share per certification scheme as a percentage of the total volume of timber consumed in the Netherlands in 2005, differentiated for timber imported with a certificate and timber without a certificate but sourced from certified forest.

	With certificate	From certified forest	Total
FSC	9.3%	2.9%	12.2%
PEFC	3.9%	18.1%	22.0%
MTCC	0.0%	0.3%	0.3%
CSA	0.0%	0.2%	0.2%
SFI	0.0%	0.1%	0.1%
Other*	0.1%	1.5%	1.6%
Total	13.3%	23.1%	36.4%

*) The category 'other' consists of imported timber bearing the Keurhout label (from various developed countries, and Gabon) and timber which was sourced from certified forests but for which no certification scheme was specified.

Table 3. Volumes of sustainable wood pulp marketed in the Netherlands in 2005 (in tonnes)

	With certificate	From certified forest	Total
FSC	4.3%	1.4%	5.7%
PEFC	19.3%	2.6%	21.9%
SFI	6.5%	0	6.5%
Other*	14%	2.1%	16.1%
Total	44.1%	6.1%	50.2%

*) The category 'other' consists of imported pulp which was sourced from certified forests but without specification of FSC and PEFC.