



Facts and Figures on FSC growth and markets

Info pack

Forest management



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Global forest area



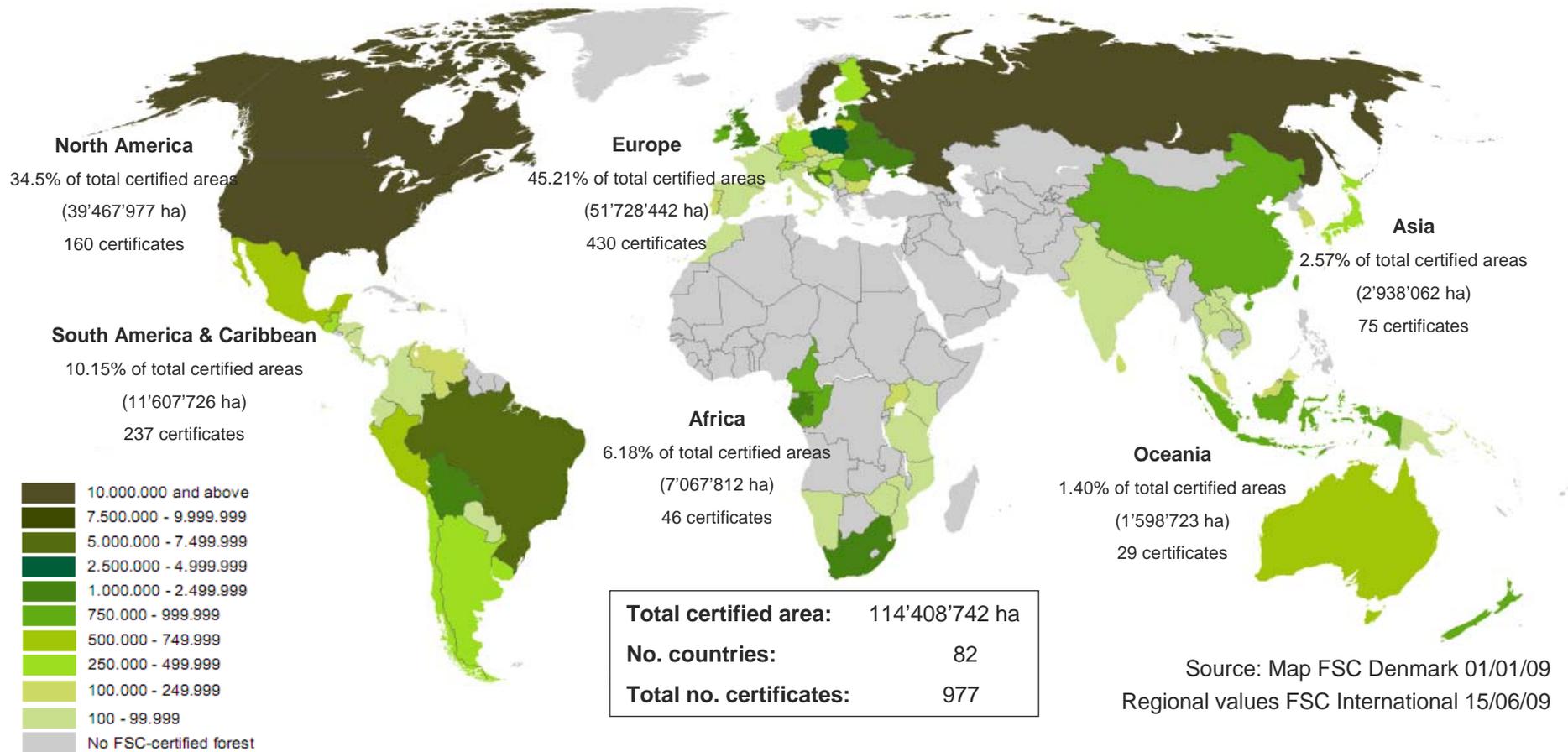
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- In 2009, over 100 million ha of forest are certified to FSC standards
- With certified forest in over 80 countries, FSC is a truly global system
- Equivalent to 5% of forests identified as primarily for production purposes*

Source: 2007 UNECE/FAO Forest Products Annual Review

* NOTE: 5% based on figures from 2007 UNECE/FAO Forest Products Annual Review; previous calculations based on figures from FAO 2007 State of the Worlds Forests.

Global FSC certified forest area: by region



Global FSC certified forest growth



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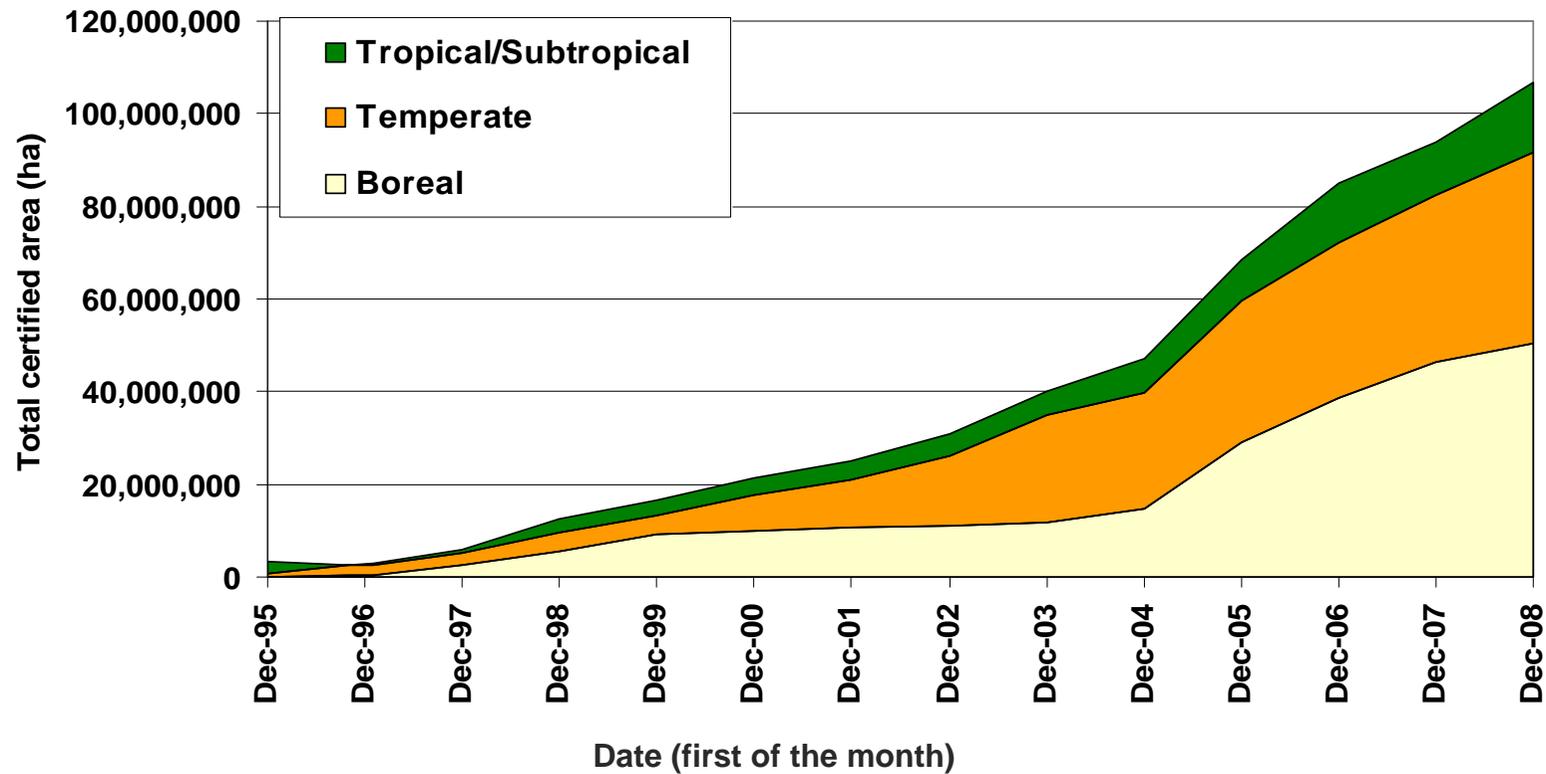
- FSC fastest growing forest certification system
– 20 million ha added in 2006 (33% increase)

Source: 2007 UNECE/FAO Forest Products Annual Review

- 2008 increase of 10 million ha



FSC certified forest area growth



Growth and markets



© 2005 Juan Carlos Reyes



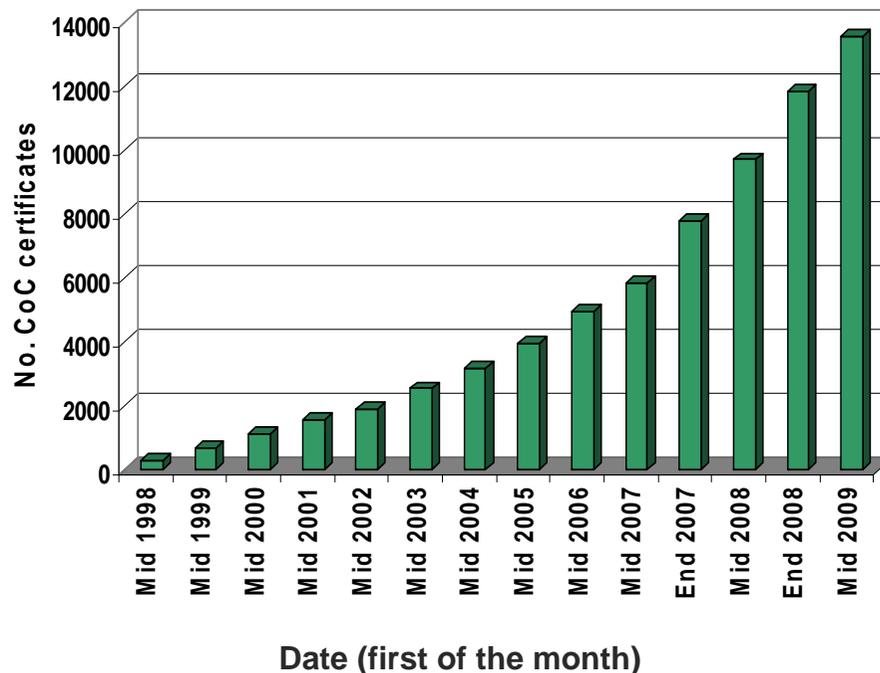
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FSC chain of custody (CoC) growth



- The FSC supply chain rapidly expanding, globally
- 50% growth in 2008
- It is becoming easier to find FSC labeled products in the market place, globally
- Greater choice for suppliers, globally
- Increased awareness of the FSC brand, globally

Source: FSC International 01/06/09



Pulp and paper

- When questioned whether publishers should use environmentally friendly paper, 94% of newspaper readers, 90% of magazine readers and 81% book readers said YES.

Source: Pollara national online panel

- DOMTAR paper producer tops 400'000 million tons of FSC pulp in 2007. In 2004, the company started with 45'000 million tons which jumped by 122% in the following years to 100'000 million tons.

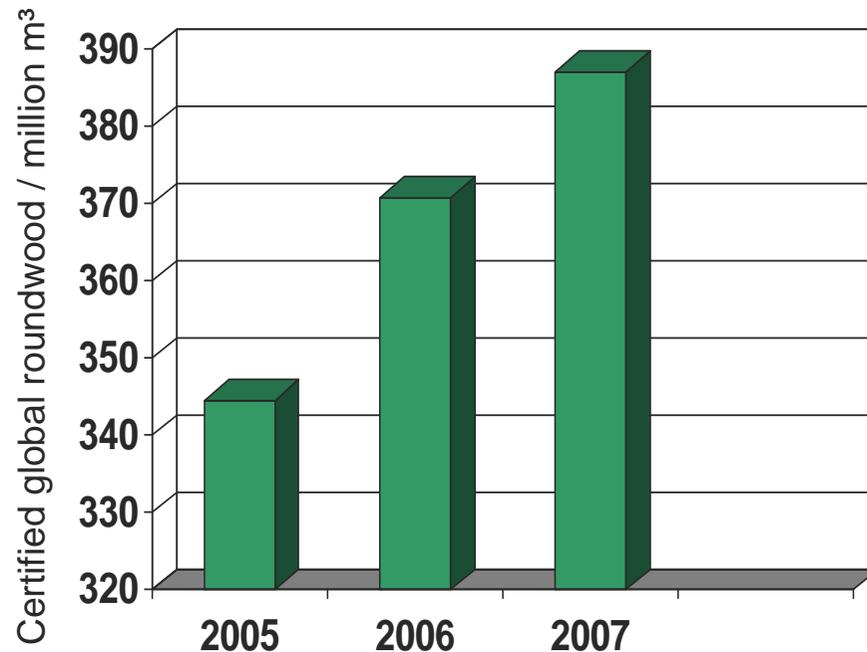
Source: Domtar EarthChoice

- 60% of literary publishers in Canada and 40% in the UK have started to shift to eco-friendly options such as FSC.

Source: Publishers World



Industrial roundwood



- In 2007, certified global industrial roundwood volumes has increased from 24.0% to 25.0%, equalling 387 million m³

Source: UNECE/FAO Forest Products Annual Market Review, 2007-2008

- Estimated 1.7 million m³ of FSC certified roundwood in the Netherlands in 2007 – 20% of the total share of construction timber in 2007

Source: FSC Netherlands



FSC's social value

Forest workers' employment rights strengthened

- In Bolivia, Brazil and Russia.

Sources: Hirschberger 2005, Tysiachniouk, 2006, Rainforest Alliance 2008, Imaflora 2009

Civil society and stakeholders participation in forest policy processes

- In several countries worldwide, FSC national standard-setting processes empower civil society to bring issues to the table on worker rights, tenure and health and safety standards in forest management.

Sources: Ros-Tonen 2004, Newsom & Hewitt 2005, Conroy 2007

Market access for smallholders

- Japanese smallholders access new timber markets; increased public awareness, gained self-confidence for their work.

Source: Ota 2006



FSC's environmental value

Biodiversity and conservation

- FSC certified companies often set aside significant areas for protection within their borders; larger plantation managers enlarge protected areas over-proportionally. GMOs banned in certified forest.

Sources: Gullison 2006, Thornber 1999, Newsom / Rainforest Alliance 2009.

Wildlife management

- In Republic of Congo, Uganda, Guatemala and Malaysia, wildlife protected outside National Parks due to FSC certification.

Sources: Nasi et al. 2007, Hughell & Butterfield 2008, FSC audit reports, Mannan et al 2002

Pesticides and garbage management:

- FSC certification bans the avoidable use of toxics in the forest and sets standards for minimizing and handling disposal of residues and chemicals.

Sources: WWF 2005, Newsom & Hewitt 2005, Imaflora 2009



FSC market recognition

- Netherlands: 67% prompted market recognition; 21% unprompted

Source: FSC Netherlands

- Switzerland: 56% prompted market recognition; 21% unprompted

Source: FSC Switzerland

- UK: unprompted recognition is 23%; Denmark: 33%

Source: FSC UK, FSC Denmark

- US: 29% of the wood products sold by Homebase are certified

Source: FSC US

- Companies with a combined estimated turnover of 250 billion USD in wood products are committed to FSC certification

Source: FSC IC



Global outreach

- Over 50 National Initiatives around the world representing FSC
- FSC forest management (FM and FM/CoC) certificates issued in 82 countries; FSC chain of custody certificates issued in 96 countries
- 20 certification bodies are FSC accredited and working around the world to audit forestry operations, manufacturers, traders, pulp producers, printers and many more...
- More than 800 FSC members from over 80 countries
- More than 16'000 people receive the News and Notes – our international monthly newsletter

Source: FSC International 15/06/09



FSC International certificate holder survey 2008



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Why become FSC certified... 3 good reasons from certificate holders

Market leadership / competitive advantage

> 49% say this is the most important reason

Clients require it

> 46% say that their clients are demanding FSC

It's the right thing to do

> 37% say it enhances their position as a responsible company



And more good reasons...



Added business value (54%)



Expanded relationships (55%)



Business impact if certificate ended (41%)



My FSC certification gives me... what our certificate holders say

Access to new markets	39 %
Access to new clients	45 %
Increased sales to existing clients	29 %
Improved company reputation	45 %
Price premiums	15 %
Worker / shareholder satisfaction	42 %
Governmental recognition & support	23 %
Maintenance of share in a declining market	35 %



Value of FSC certification

Client retention – in **Japan** over 49% of certificate holders rate this as their biggest value

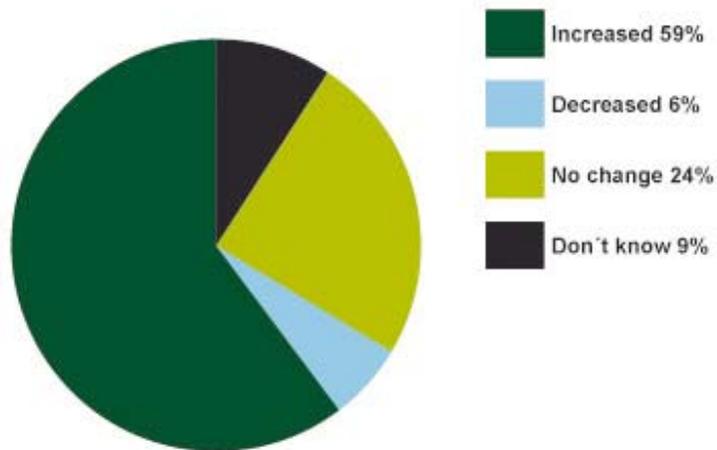
New clients – in Germany over 55 % of certificate holders agree that FSC brings new business for them

Increased revenue – in Spain 43 % of certificate holders are seeing increased revenues from being FSC certified

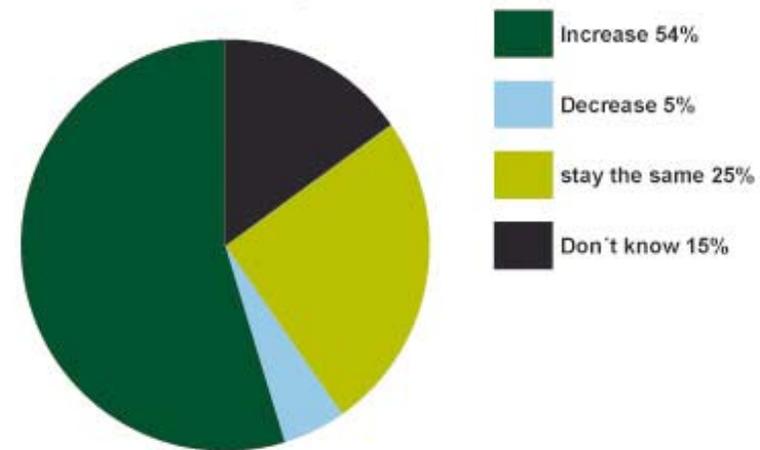
Public support from environmental groups – over 70% of Italian certificate holders are seeing this benefit

Importance of FSC certification

The importance for your business has

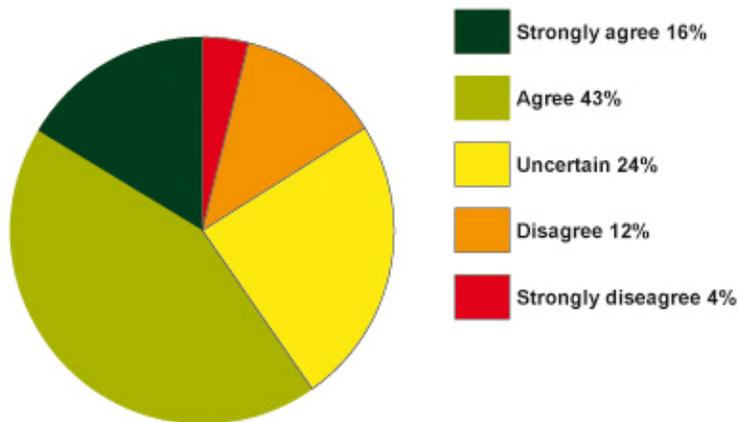


Over the next 12-24 months the business value of my FSC certification will...

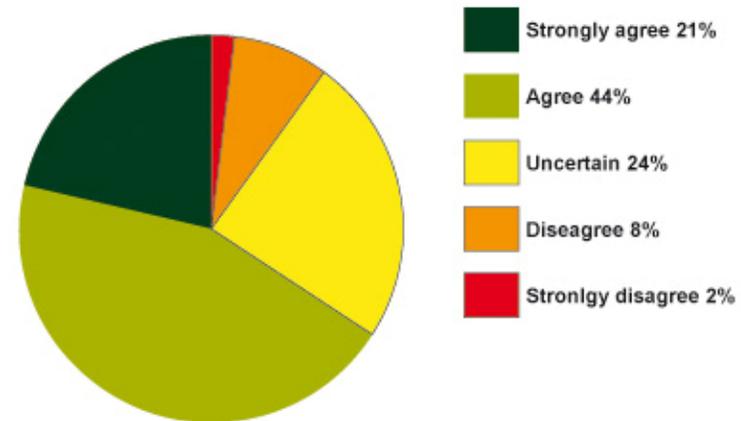


Benefits of FSC certification

FSC certification brings increased sales to existing clients



FSC certification brings access to new markets





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

FSC shall promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests.



Responsible forest management

Environmentally appropriate ensures that the harvest of timber and non-timber products maintains the forest's biodiversity, productivity, and ecological processes.

Socially beneficial helps both local people and society at large to enjoy long term benefits and also provides strong incentives to local people to sustain the forest resources and adhere to long-term management plans.

Economically viable forest operations are structured and managed so as to be sufficiently profitable, without generating financial profit at the expense of the forest resource, the ecosystem, or affected communities.



The FSC Global Strategy

- Goal 1:** FSC will provide leadership in advancing globally responsible forest management
- Goal 2:** FSC will ensure equitable access to the benefits of FSC systems
- Goal 3:** FSC will ensure integrity, credibility and transparency of the FSC system
- Goal 4:** Products from FSC certified forests will create more business value than products from non-FSC certified forests
- Goal 5:** FSC will strengthen its global network to deliver on Goals 1 through 4



Resources

- Quarterly updates on FSC certificates – FSC website
- www.fsc.org/figures and www.fsc.org/charts
- Global forest statistics - UN FAO State of the World's Forests 2007
www.fao.org/docrep/009/a0773e/a0773e00.htm
- Benefits of FSC and testimonials from supporting organizations:
www.whyFSC.com
- WWF website: forests
www.panda.org/about_wwf/what_we_do/forests/index.cfm



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