



# FSC® Global Market Survey

FM/CoC Report 2018

Forest Stewardship Council®

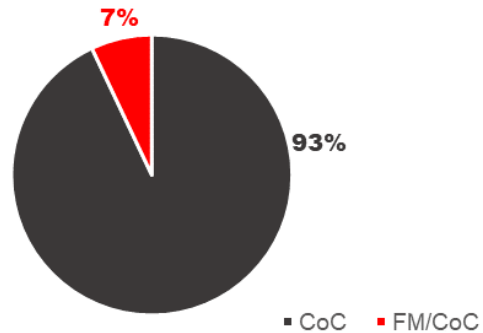
# Certificate Holders

Focus: CoC vs. FM/CoC

## Response rate

Approximately **12.7 per cent of FSC certificate holders participated**, with **4,062 respondents** out of 32,086 successfully completing the survey. A total of **93 per cent (n=3771)** of respondents were **CoC certificate holders**, and **7 per cent (n=285)** **FM/CoC certificate holders**.

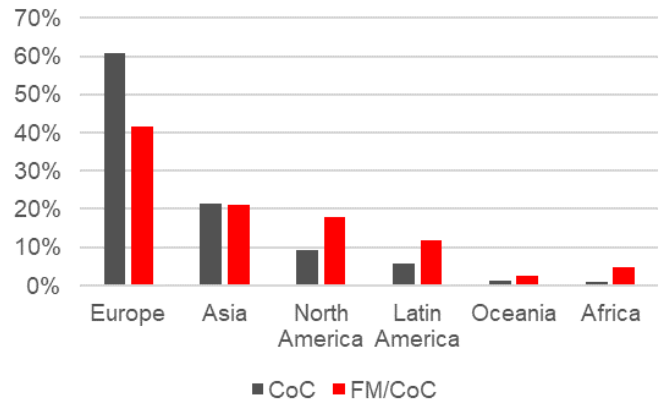
Participants by certificate type



## By region

The survey respondents were based in **95 different countries**, whereas FSC had **certificate holders in 123 countries at the time of the survey**. Some 50 per cent of responses came from ten countries with large numbers of FSC certificate holders: Germany, Italy, United States, China, United Kingdom, Japan, Poland, Brazil, Netherlands and Russia. Most CoC and FM/CoC participants came from Europe and Asia. For the rest of the regions more FM/CoC than CoC certificate holders participated.

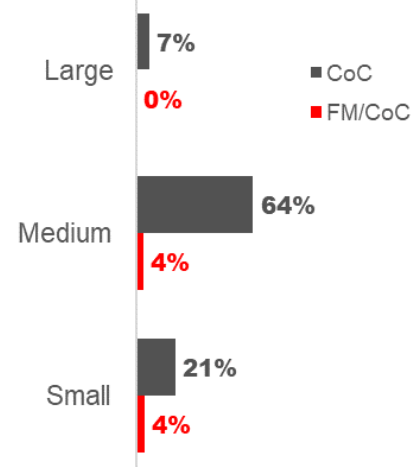
Participants by region



## By company size

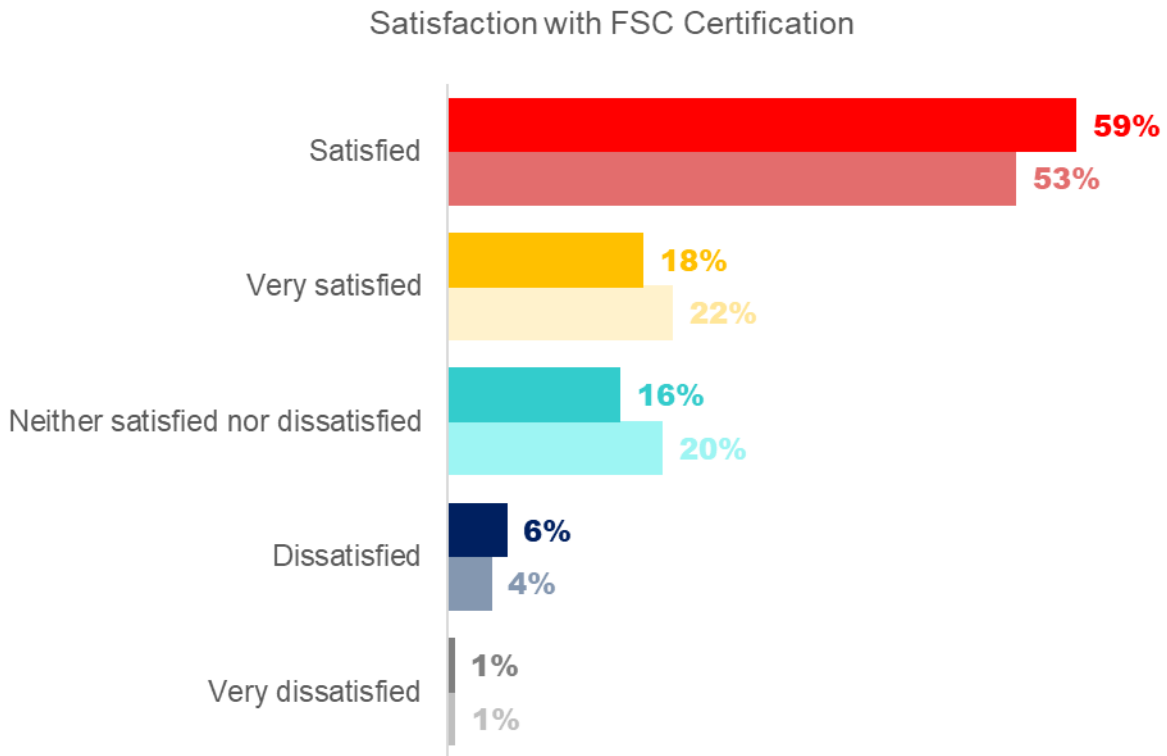
Based on sales of forest products, **68 per cent of certificate holders at the time of the survey were medium-sized companies**, **25 per cent were small companies**, and **seven per cent were large companies**.

Participants by company size



# High levels of satisfaction

Q: How satisfied are you with your FSC certification?



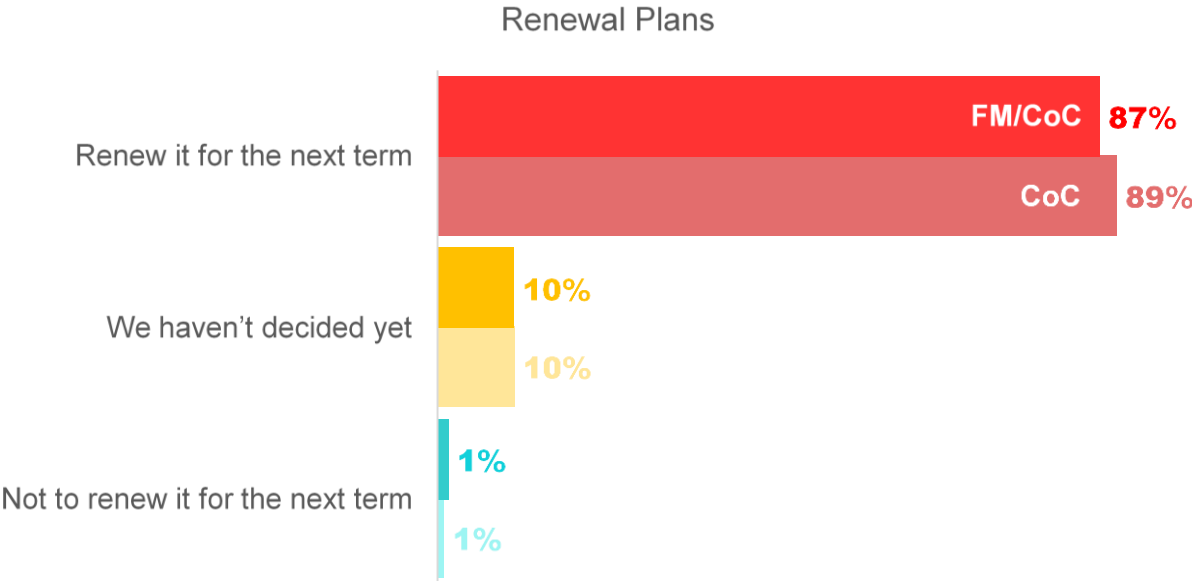
Overall the average level of satisfaction with FSC certification is high for all certificate types.

**Seventy-five per cent of CoC** certificate holders are either “**satisfied**” or “**very satisfied**” with their certification, and only five per cent of the state explicitly that they are dissatisfied.

In contrast, **seventy-eight per cent of FM/CoC** respondents are either “**satisfied**” or “**very satisfied**” with their certification, and seven per cent are dissatisfied.

# Continued commitment to FSC

Q: What plans does your company have regarding its FSC certificate?



The vast majority of **FM/CoC** and **CoC** certificate holders indicate they **will renew** their FSC certification for the coming term, while only one per cent said they will not renew their certification. Ten per cent of respondents are undecided.

# High demand for FSC

Q: What were the main reasons that your company engaged with FSC?



Newly CoC certified companies (certified for less than a year) were asked why they decided to engage with FSC, and the top reasons they chose were: **client demands, competitive advantage and improved market access.**

FM/CoC participants also selected the abovementioned reasons as the top motives for engaging with FSC. *Competitive advantage* and *improved market access* were selected nearly equally by both CoC and FM/CoC respondents with a slight difference of one to two per cent. On the other hand, **client demands**, while still one of the top reasons chosen by both types of certificate holders, was **selected more by CoC respondents** (82 per cent) than FM/CoC (50 per cent).

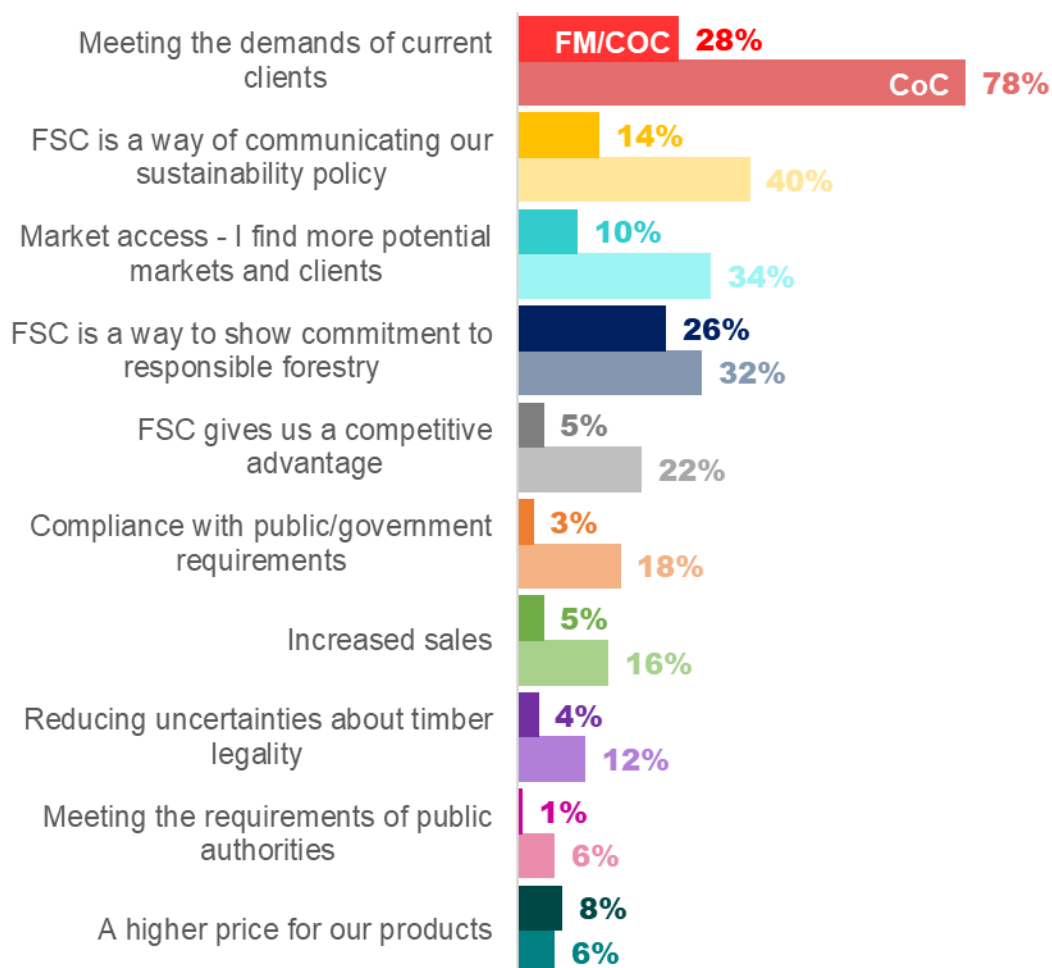
FM/CoC participants also chose **knowledge that the materials come from responsibly managed forests as a main reason** for engaging with FSC, **matching improved market access** (36 per cent each). In contrast, fewer CoC respondents selected it as a main reason (17 per cent), instead they considered *in line with our corporate social responsibility strategy* a more compelling reason (23 per cent).

In general, meeting market requirements and operational considerations are more relevant than communicating social and environmental responsibility.

## FSC delivers business benefits

Q: What are the most important benefits for you from being FSC certified?

Top 10 Benefits of being FSC certified

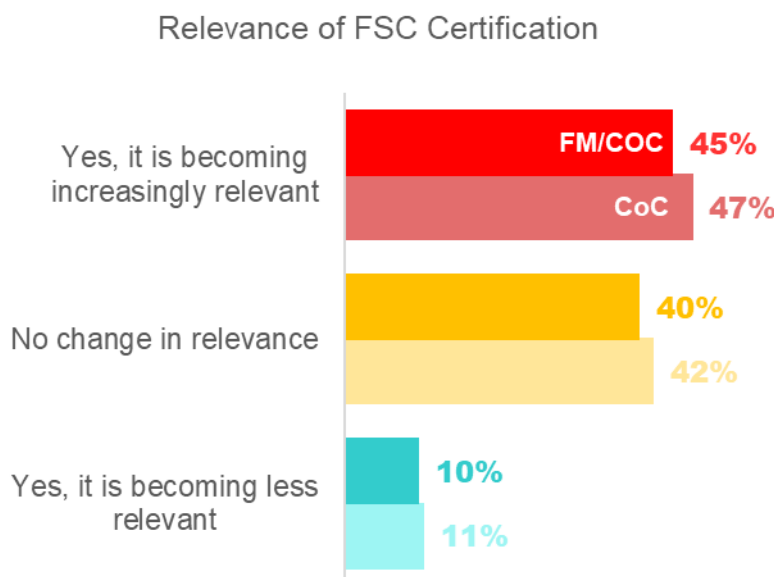


The majority of longer-term **CoC and FM/CoC** certificate holders state that **meeting the demands of their current clients is the most important benefit** of being FSC certified; followed by *FSC is a way to communicate our sustainability policy* and *market access-finding more potential markets and clients*.

The benefits *meeting the demands of current clients* and *market access - finding more potential markets and clients* match the top reasons given by newly certified companies for becoming FSC-certified. This is encouraging as it suggests that FSC delivers on expectations of certified companies in the long term.

## Increasing relevance of FSC

Q: *In your opinion, is the relevance of FSC certification changing in your sector?*



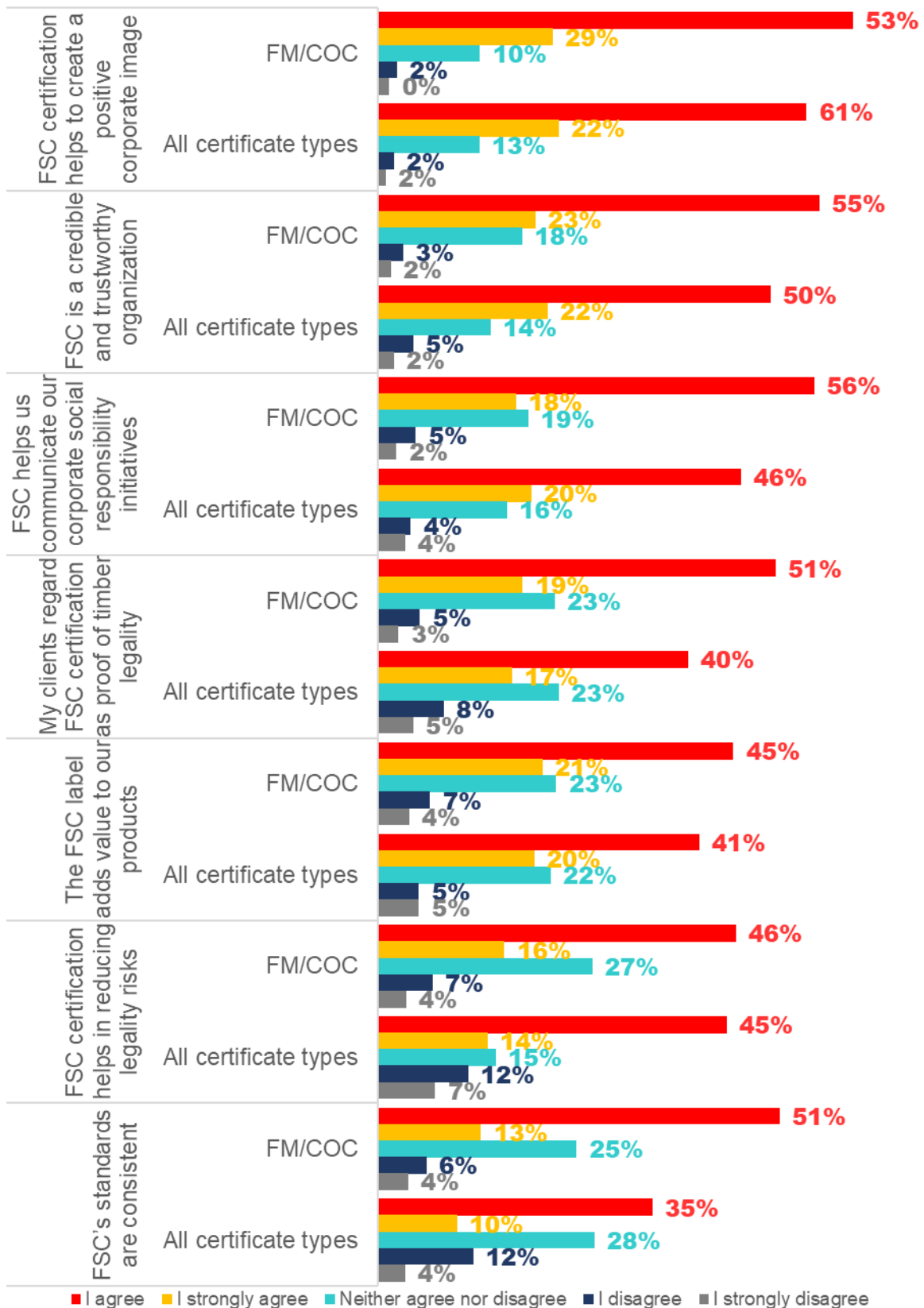
Nearly half of **FM/CoC and CoC respondents think that FSC certification will remain at least as relevant as it is currently or become increasingly relevant.** While the other majority think that FSC certification is becoming increasingly relevant in their sector. Only 10 and 11 per cent respectively believe it is becoming less relevant.

## Positive perception of FSC

Q: *Please indicate the extent to which you agree with the following statements.*

Certificate holders were asked to rate their agreement with statements about FSC, FSC certification and the FSC label. The answers revealed a favourable view on FSC. On average, both FM/CoC and CoC certificate holders chose to agree rather than disagree with all statements. The **most favourable** statements were: ***FSC certification helps create a positive corporate image; FSC is a credible and trustworthy organization; and FSC helps us communicate our CSR initiatives.***

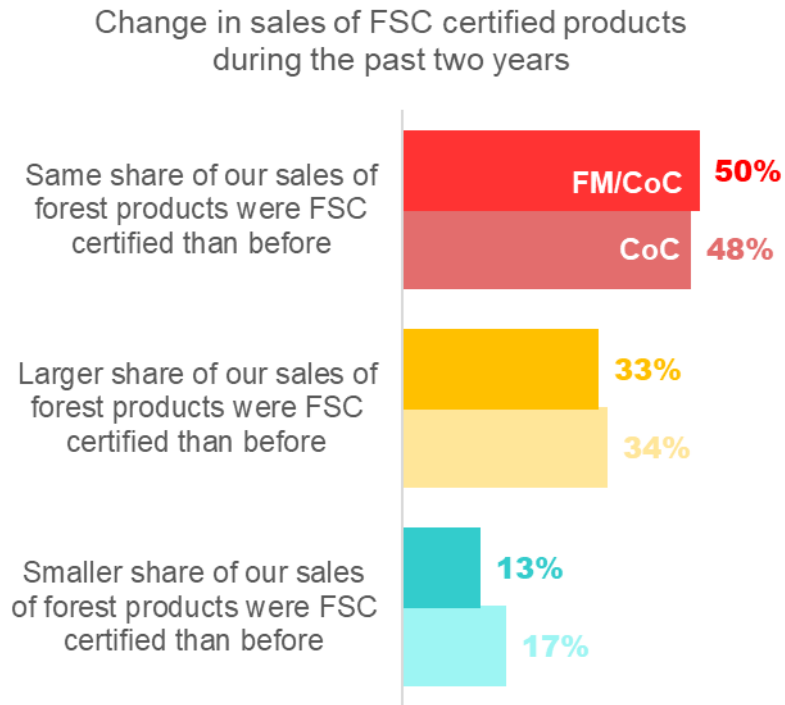
### Assesment Statement on FSC Certification





# Sales on the rise

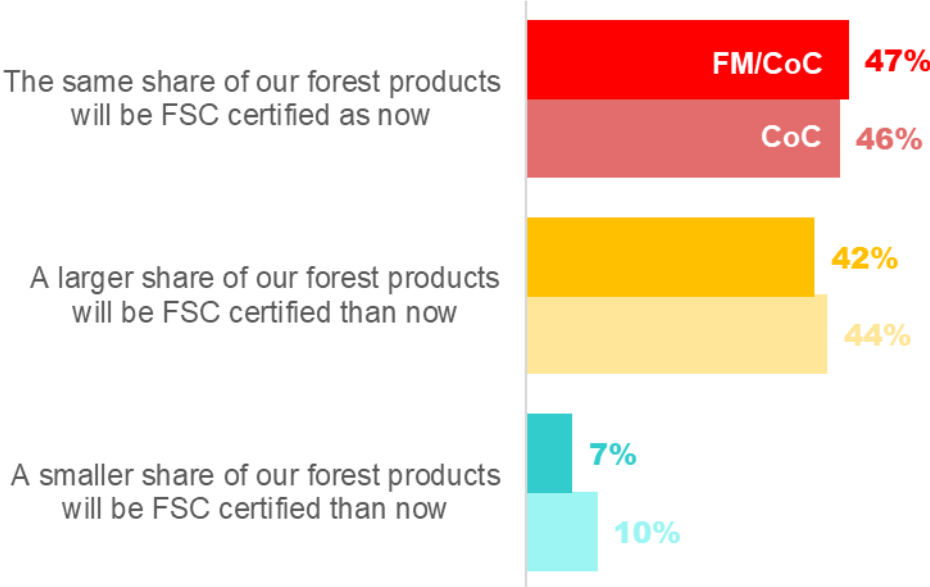
Q: How have your company's sales changed during the past two years compared to sales before?



Nearly half of FM/CoC and CoC certificate holders state that during the **past two years** their **share of sales of FSC-certified products** has stayed the same, while about one third claim the share had increased. Only 17 per cent of CoC participants and 13 percent of FM/CoC respondents state that their share has decreased.

Q: How do you see the trend of your FSC-certified products during the next 2 years?

Trend of FSC certified product during the next two years

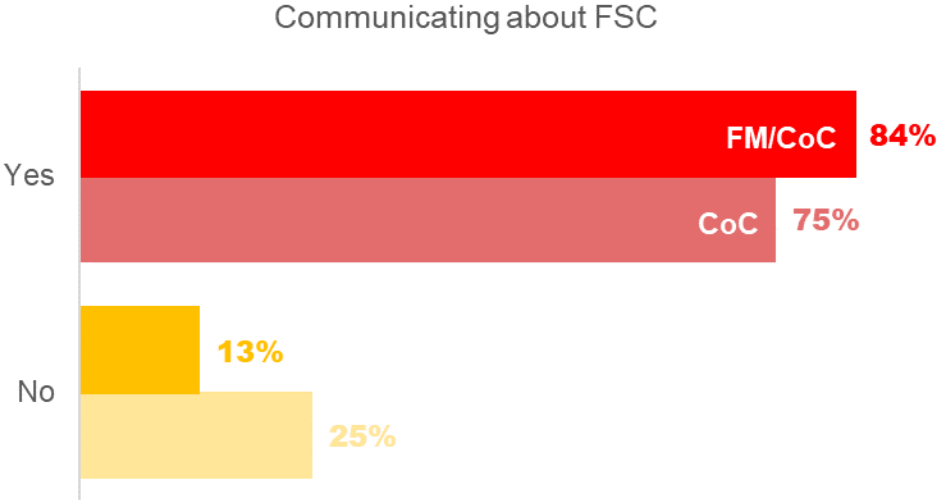


The majority of FM/CoC and CoC certificate holders expect their **share of sales of FSC-certified products** to stay the same **in the coming two years**, and a high percentage of respondents (42 and 44 per cent respectively) expect their share to rise, while only 7 and 10 per cent expect it to drop.

It cannot be said with certainty how the total share of FSC-certified material on the market is developing, because the results above do not account for the volume of material that was traded. However, these results may serve as a strong indicator pointing to a growing share of FSC-certified products on the market.

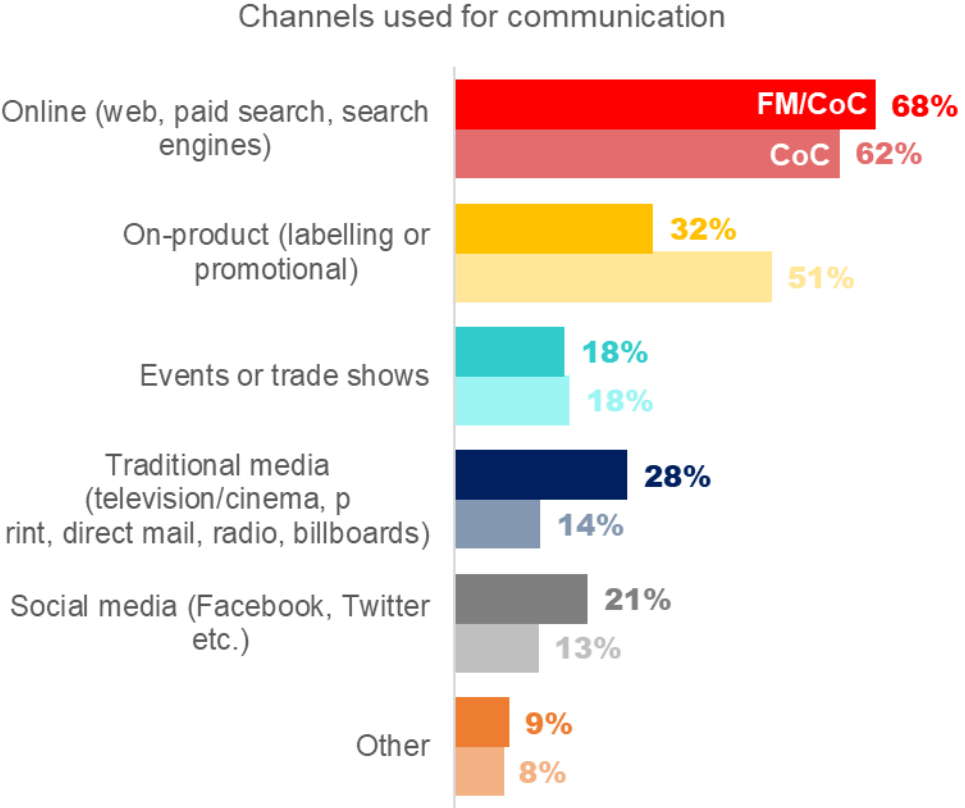
# Communication is the norm

Q: Do you communicate about FSC?



Three quarters of CoC certificate holders and an even greater percentage, 84 per cent of FM/CoC respondents, said that their company communicates about FSC.

Q: If yes, through which channels?



The most frequently used channels of communication selected are: online (including websites, paid search and search engines), on-product (labelling or promotional), and events or trade shows.

As can be expected *On-product labelling* is used more by CoC certificate holders than FM/CoC. On the other hand, the *Traditional Media* and *Social Media* channels are used more by FM/CoC than CoC participants.