



FSC® Global Market Survey

FM/CoC Report 2018

Forest Stewardship Council®

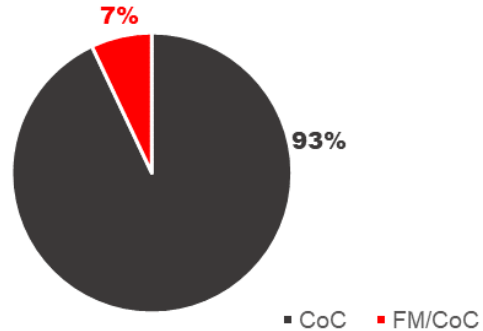
Certificate Holders

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**.

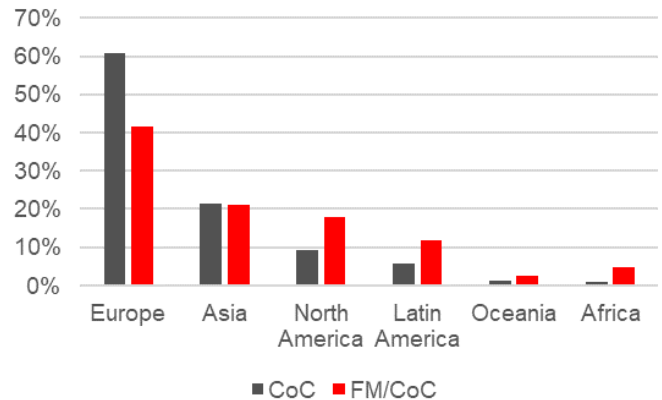
Participants by certificate type



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.

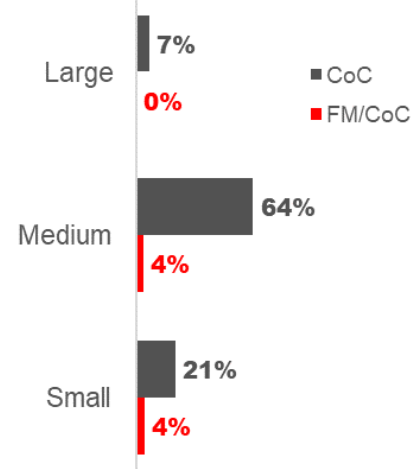
Participants by region



By company size

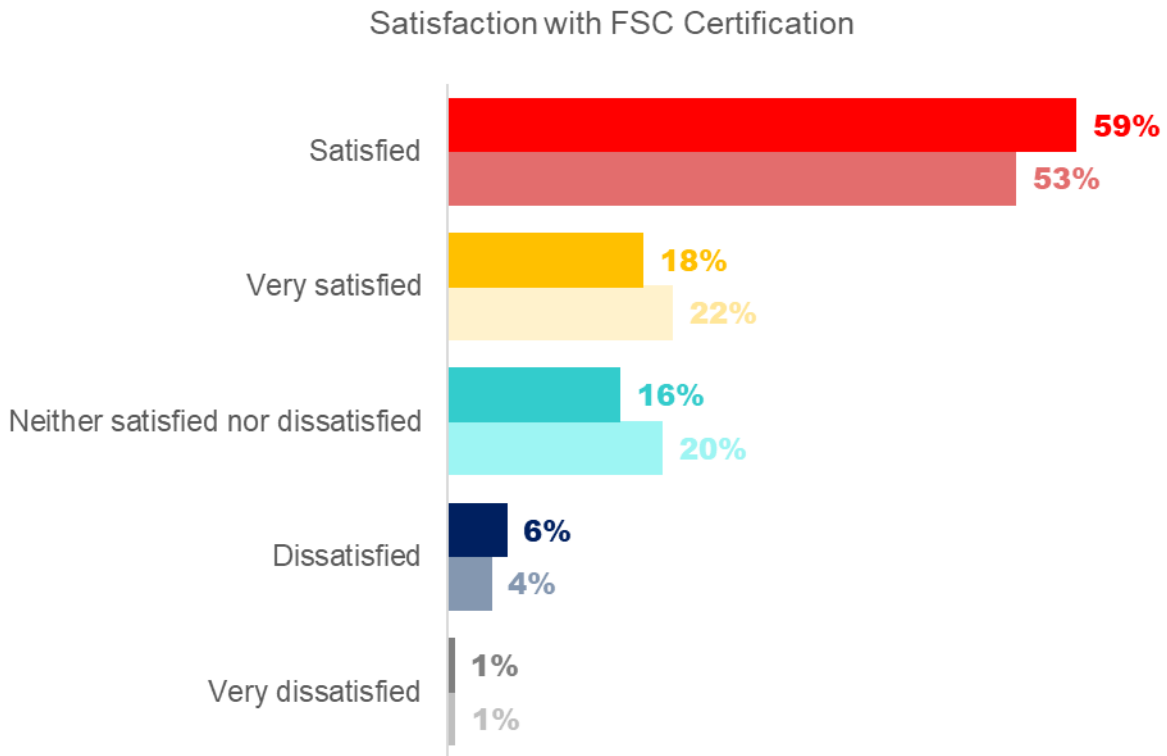
Based on sales of forest products, **68 per cent of certificate holders at the time of the survey were medium-sized companies**, **25 per cent were small companies**, and **seven per cent were large companies**.

Participants by company size



High levels of satisfaction

Q: How satisfied are you with your FSC certification?



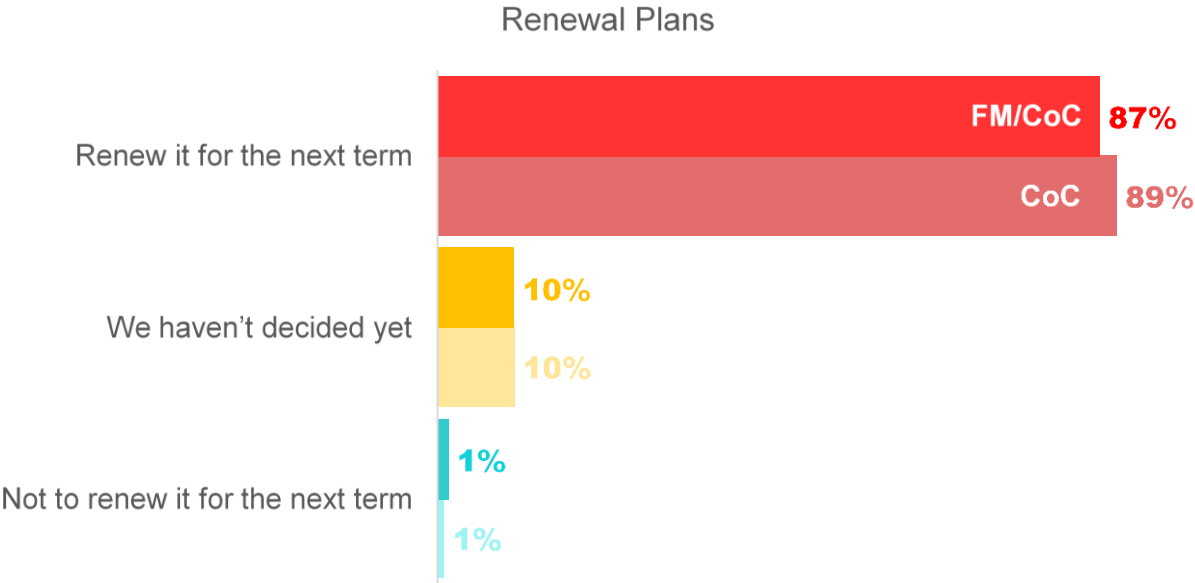
Overall the average level of satisfaction with FSC certification is high for all certificate types.

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).

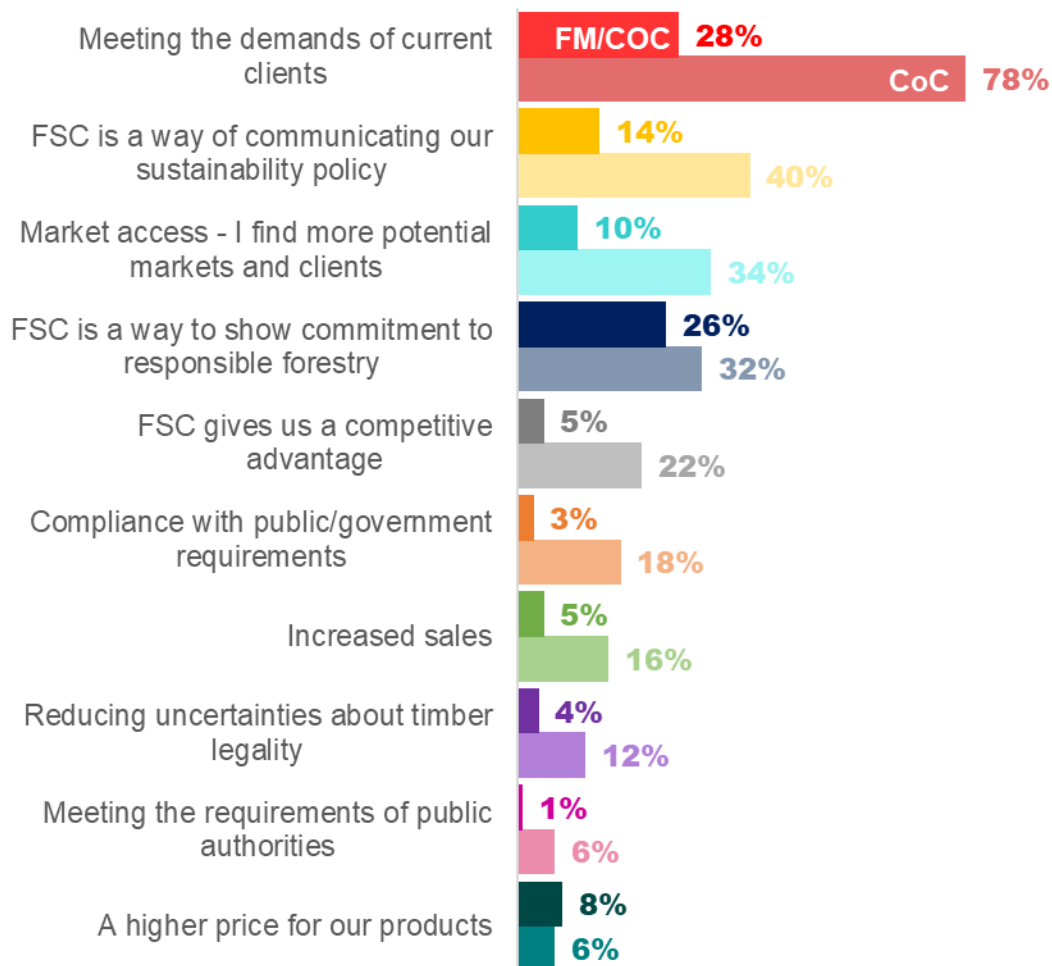
FM/CoC participants also chose **knowledge that the materials come from responsibly managed forests as a main reason** for engaging with FSC, **matching improved market access** (36 per cent each). In contrast, fewer CoC respondents selected it as a main reason (17 per cent), instead they considered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

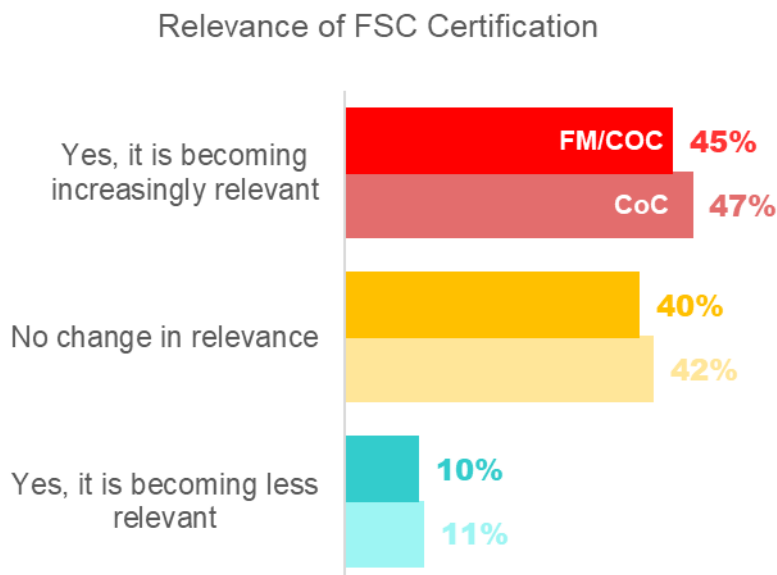


The majority of longer-term **CoC and FM/CoC** certificate holders state that **meeting the demands of their current clients is the most important benefit** of being FSC certified; followed by *FSC is a way to communicate our sustainability policy* and *market access-finding more potential markets and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



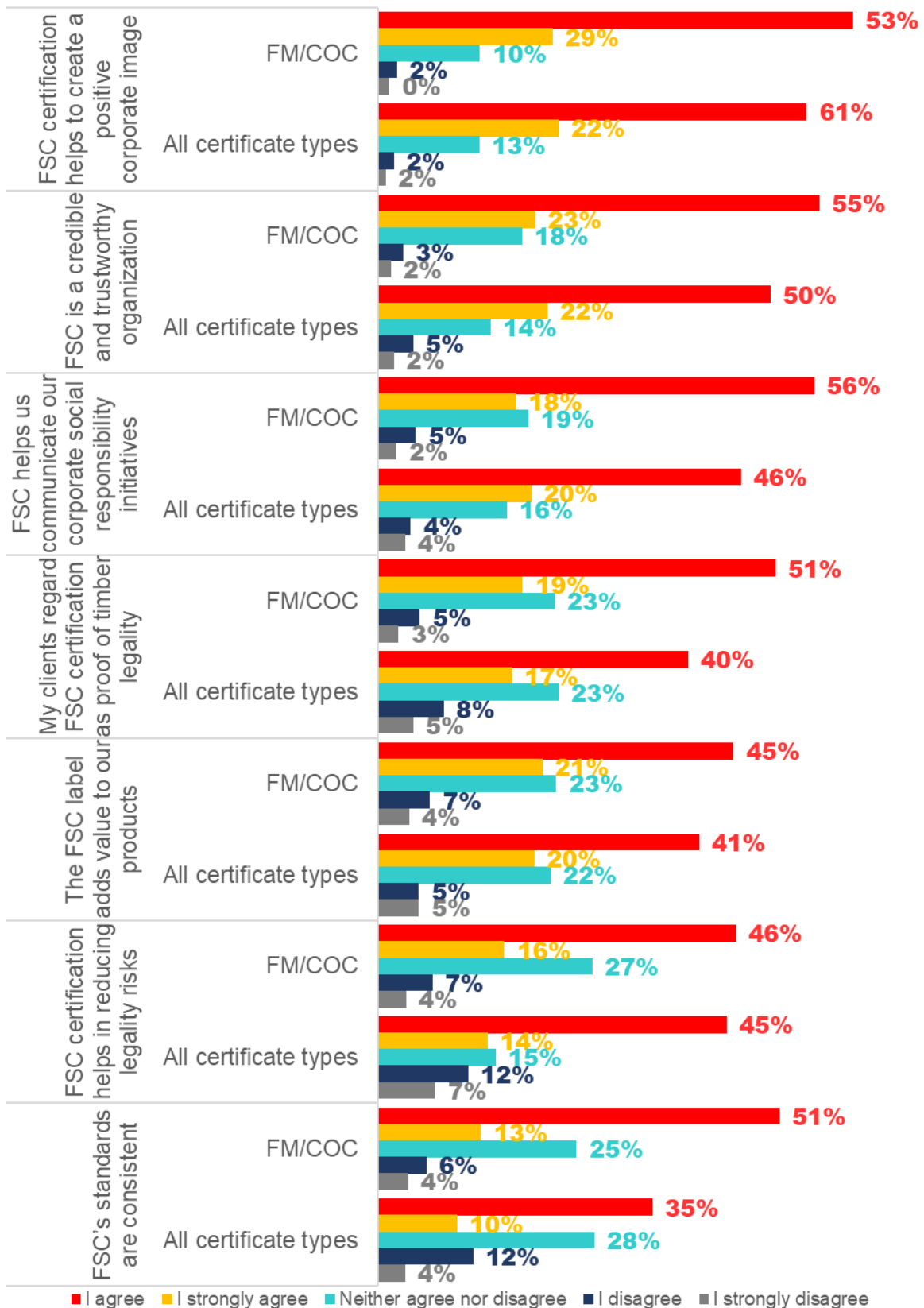
Nearly half of **FM/CoC and CoC respondents think that FSC certification will remain at least as relevant as it is currently or become increasingly relevant**. While the other majority think that FSC certification is becoming increasingly relevant in their sector. Only 10 and 11 per cent respectively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

Positive perception of FSC

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

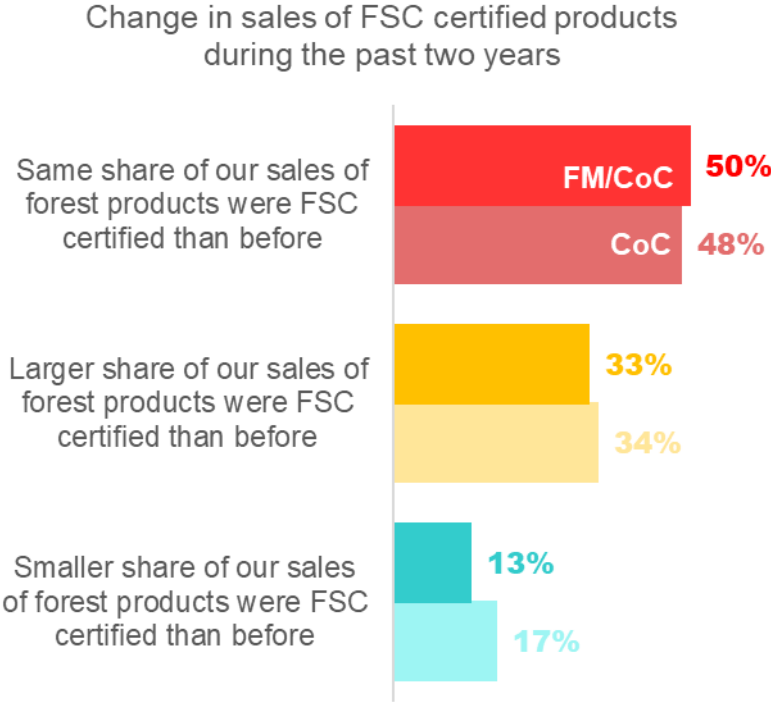
Certificate holders were asked to rate their agreement with statements about FSC, FSC certification and the FSC label. The answers revealed a favourable view on FSC. On average, both FM/CoC and CoC certificate holders chose to agree rather than disagree with all statements. The **most favourable** statements 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

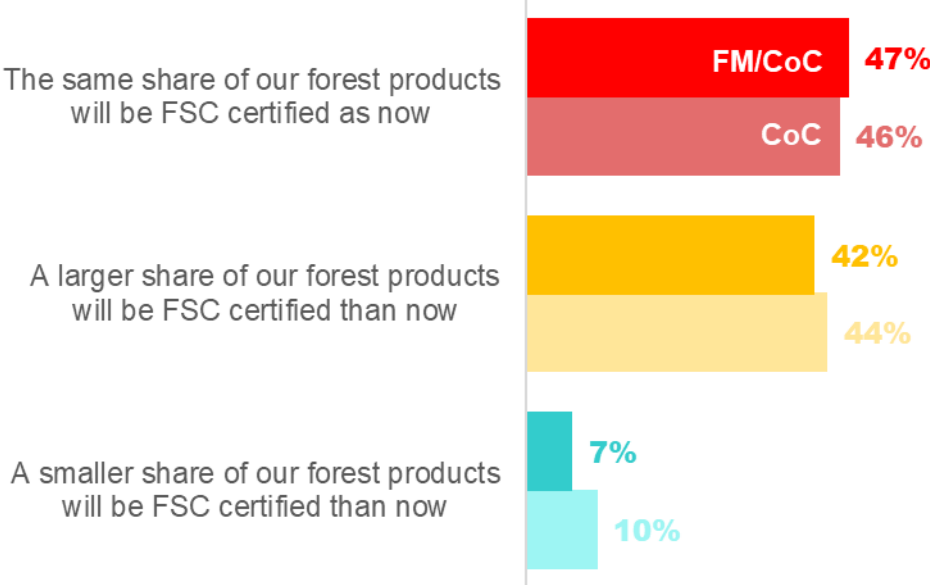
Q: How have your company's sales changed during the past two years compared to sales before?



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

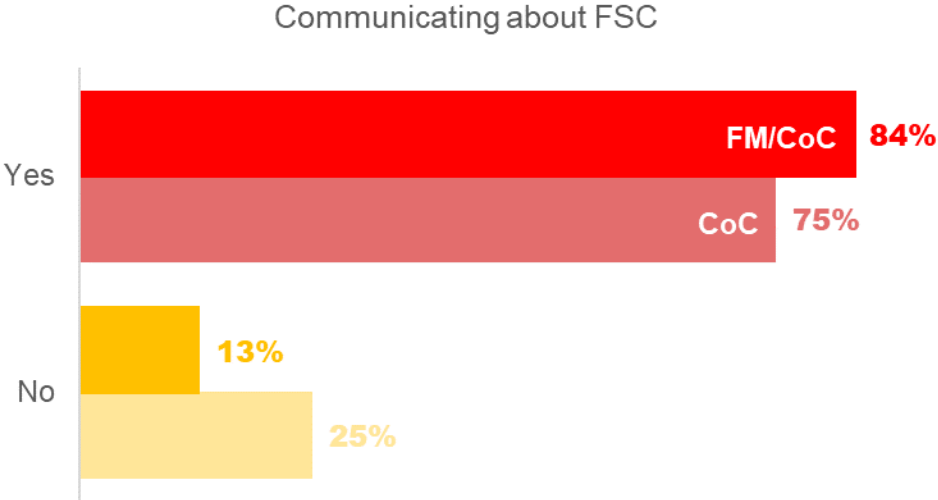


The majority of FM/CoC and CoC certificate holders expect their **share of sales of FSC-certified products** to stay the same **in the coming two years**, and a high percentage of respondents (42 and 44 per cent respectively) expect their share to rise, while only 7 and 10 per cent expect it to drop.

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.

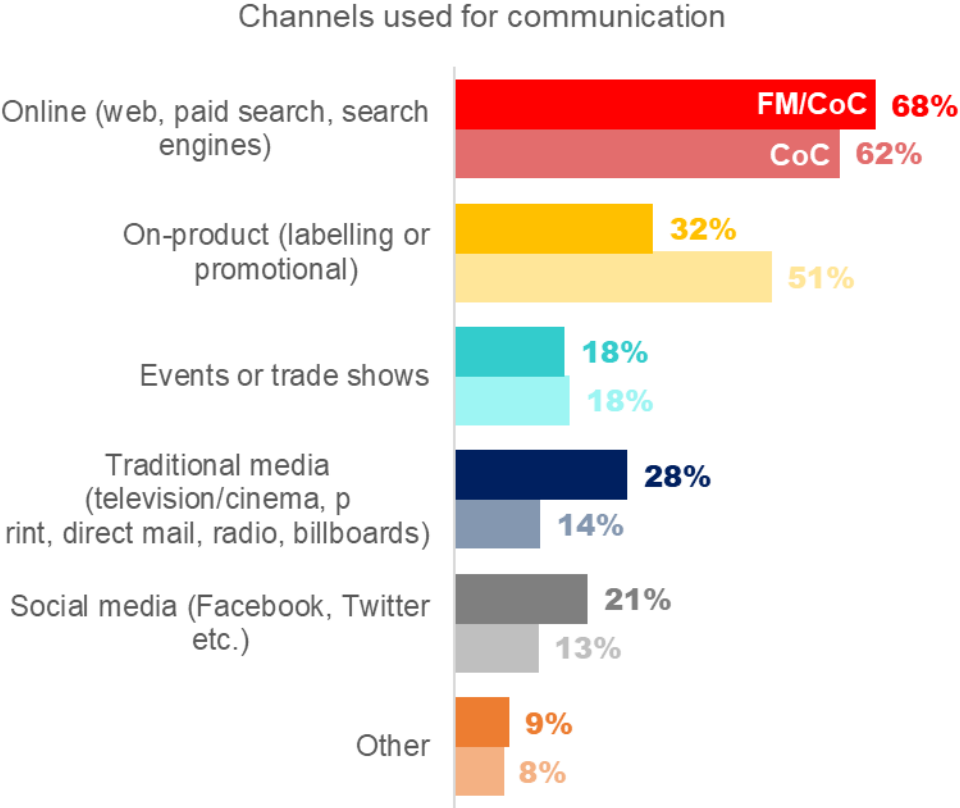
Communication is the norm

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.