

THE TRUST ADVANTAGE

A global consumer insights report
on climate concern, forest protection,
and responsible purchasing

OCTOBER 2025

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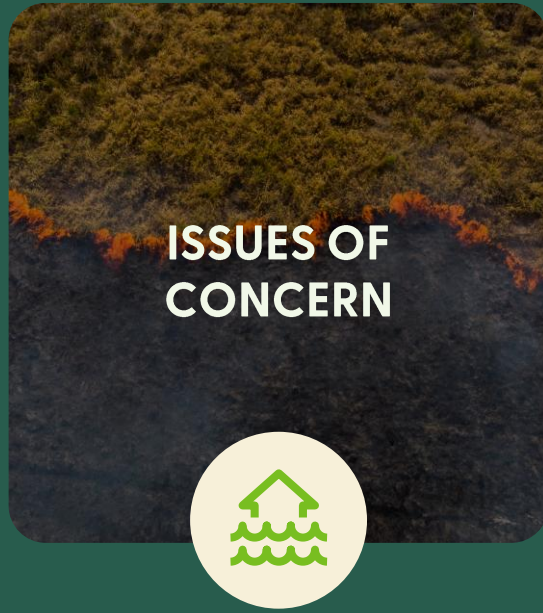


**FORESTS
FOR ALL
FOREVER**™

Research Introduction

FSC commissioned Ipsos, one of the largest market research companies in the world, to lead a global consumer research study to understand consumers attitudes towards forestry issues, how sustainability influences consumer purchase decisions, and awareness and perceptions of FSC.

In the research report, the following insights are included:





BACKGROUND

Argentina	Australia	Austria	Belgium
n=800	n=802	n=800	n=800
Bolivia	Brazil	Canada	Chile
n=800	n=800	n=800	n=800
China	Colombia	Croatia	Czech Republic
n=1200	n=800	n=800	n=800
Denmark	Ecuador	Egypt	Estonia
n=800	n=800	n=800	n=800
Finland	France	Germany	Guatemala
n=800	n=800	n=800	n=800
Honduras	India	Indonesia	Italy
n=800	n=800	n=800	n=800
Japan	Kenya	Latvia	Lithuania
n=800	n=800	n=800	n=800
Malaysia	Mexico	Netherlands	New Zealand
n=800	n=800	n=800	n=800
Norway	Peru	Poland	Portugal
n=800	n=800	n=800	n=800
Romania	Slovenia	South Africa	South Korea
n=800	n=800	n=800	n=800
Spain	Sweden	Switzerland	Thailand
n=800	n=800	n=800	n=800
Türkiye	UAE	UK	Ukraine
n=800	n=800	n=800	n=800
USA	Vietnam		
n=1200	n=800		

Full study country
 Tracking country

METHODOLOGY:

40,802 consumers across **50** markets were engaged in one of the world's largest consumer surveys on forests



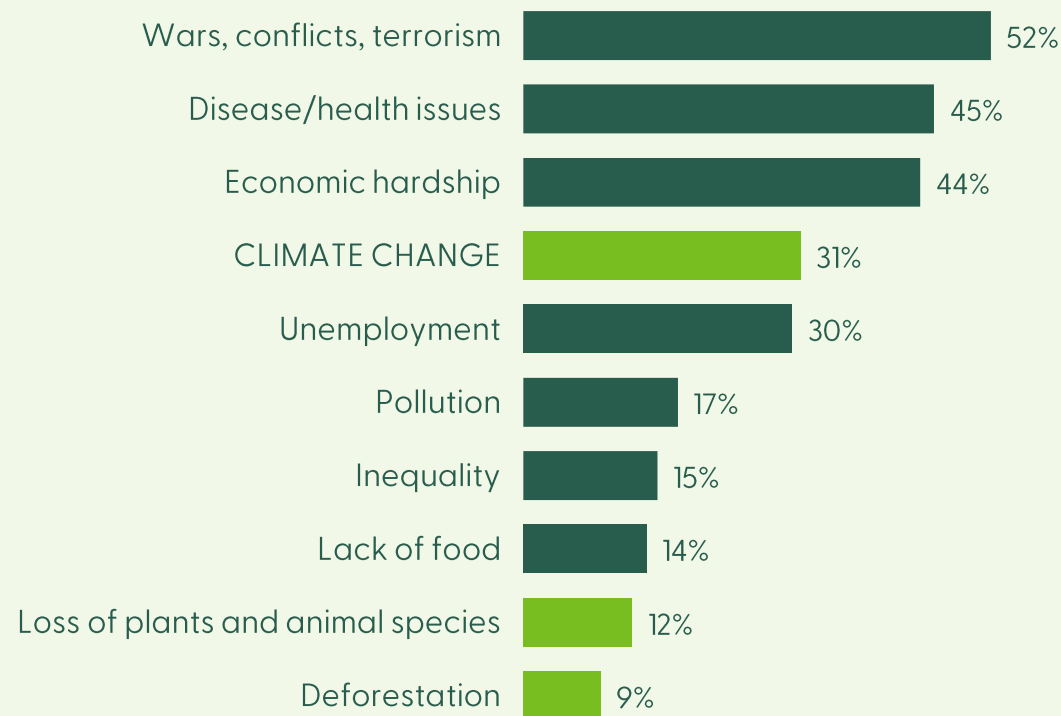
Online surveys were conducted May through July 2025. The samples were designed to be **nationally representative** as far as realistically possible using online panels.

Climate change concern holds steady but is overshadowed by immediate crises



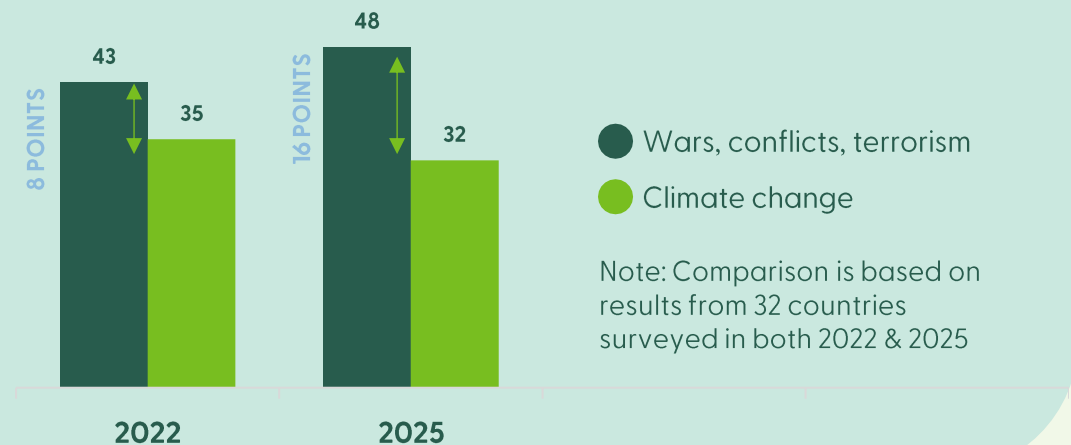
Despite rising impacts worldwide, public attention shows little shift – global concern for climate change remains in fourth place, overshadowed by rising concern of immediate crises like wars and health.

Proportion selecting each issue in top three most worrying issues



Global concern for wars, conflicts, and terrorism, as well as disease/health issues significantly increased since 2022 with economic hardship remaining a top concern.

While concern for climate change was steady, the concern gap has significantly widened since 2022.



Q1. To start with, which of the following issues worry you the most? Please select up to three issues from the list. (10 issues)
Base: Total global sample (n=40,802)
Note: Light green bars are the most relevant issues for FSC.

Important Forestry Issues

On forestry issues specifically, the loss of plant and animal species, the impact on climate change from loss of forests, and deforestation are the biggest worries.

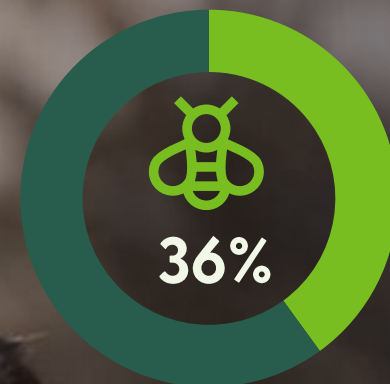
Deforestation is most often ranked top forest concern.

Q11. There are many different potential threats to the world's forests, the wildlife living there and the people who live and work there. Which of these potential issues worries you the most? Please select the three issues that concern you the most, in order of importance. (13 issues)

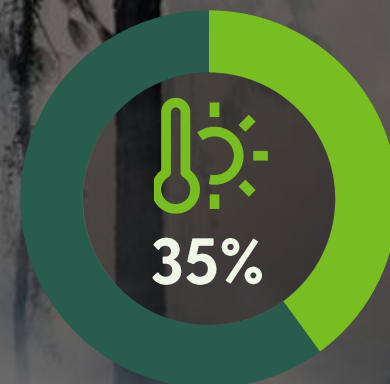
Base: Total of 29 full study countries (n=24,002)



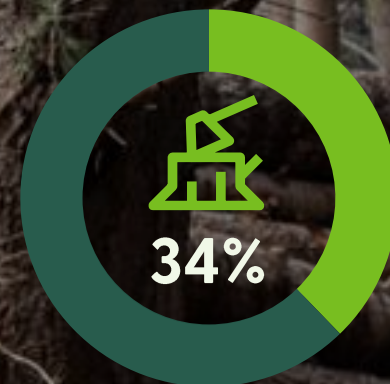
Biodiversity loss



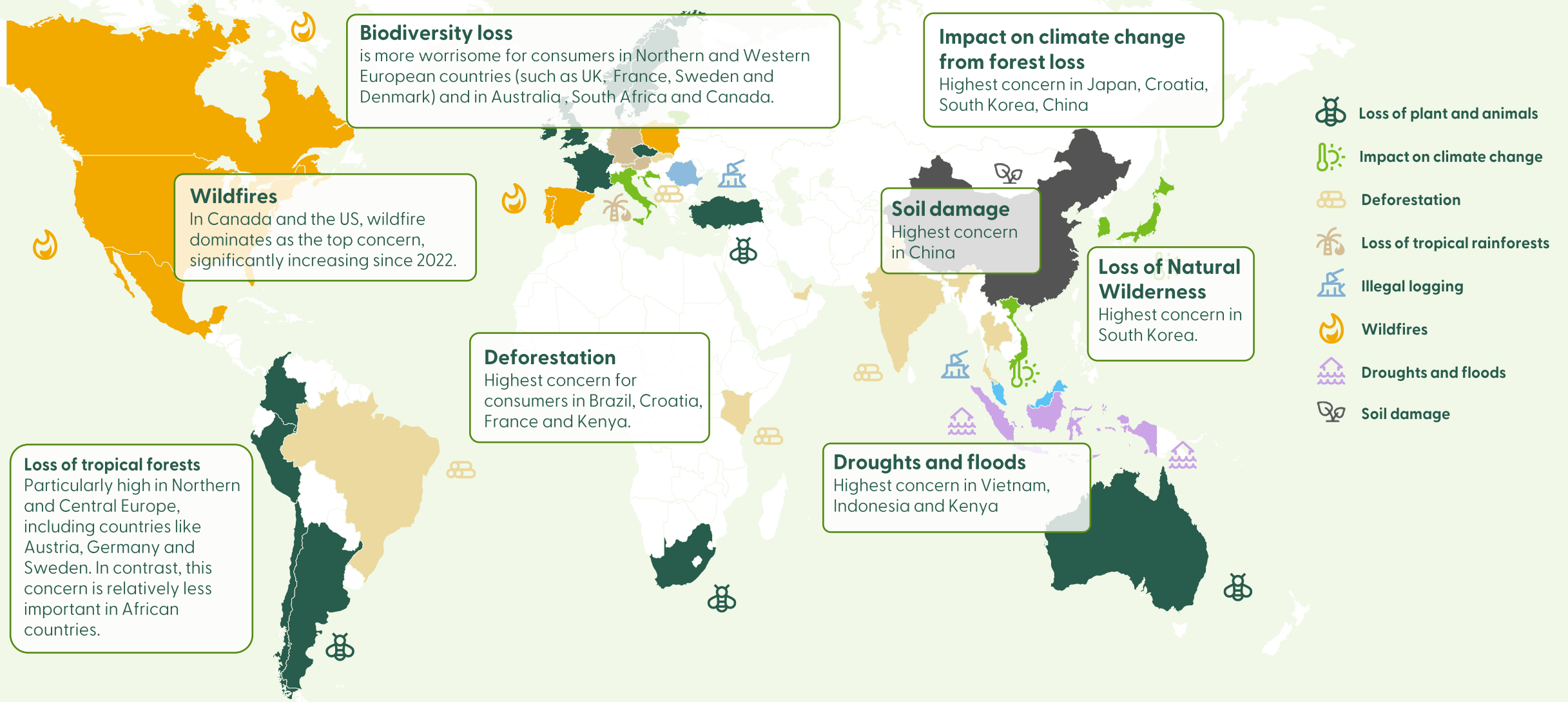
Climate change



Deforestation



#1 forest concerns around the world



Q11. There are many different potential threats to the world's forests, the wildlife living there and the people who live and work there. Which of these potential issues worries you the most?

Please select the three issues that concern you the most, in order of importance. (13 issues)

Base: Total of 29 full study countries (n=24,002)



CONSUMER ATTITUDES



Consumers still act on climate at the checkout

Across 50 countries, 31% say climate change is a top concern; while in the 29 countries asked, 72% prefer products that do not harm the planet or animals.



CONSUMER EXPECTATIONS

66%

I expect companies to ensure that the wood/paper products and packaging they sell are not contributing to deforestation

65%

Information about sustainability on products should be certified by an independent organization

CONSUMER TAKING ACTION

72%

I prefer to choose products that do not damage plants and animals

62%

I try to buy products packaged with renewable materials such as paper instead of plastic

61%

I can help to protect the forests by purchasing products that have been certified by an independent organization



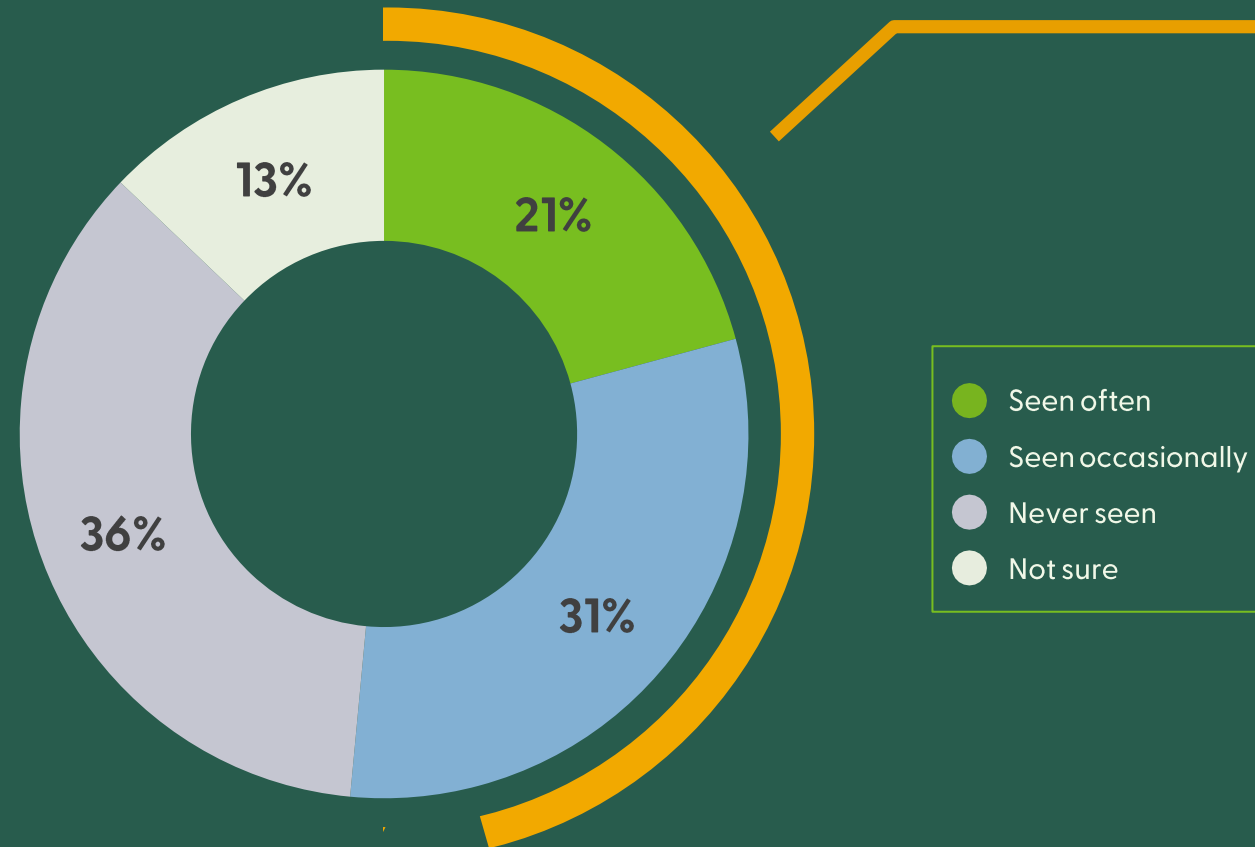
Q10. How well does each of the following statements describe your opinion?
(7-point scale: 1= Does not describe my opinion at all, 7= Describes my opinion very well)
Base: Total of 29 full study countries (n=24,002)



FSC RECOGNITION



FSC IS THE MOST RECOGNIZED FOREST CERTIFICATION SYSTEM GLOBALLY¹



52%

of global consumers recall seeing the FSC logo.

No other forest certification tested came higher globally in all the 50 countries surveyed.¹

FSC's global brand recognition has increased by 5% points since 2022²

The recognition of FSC is highest among young consumers aged 18-24 years, followed by 25-44-year-olds.

Q3. Have you ever seen the following logos or labels? (4-point scale)

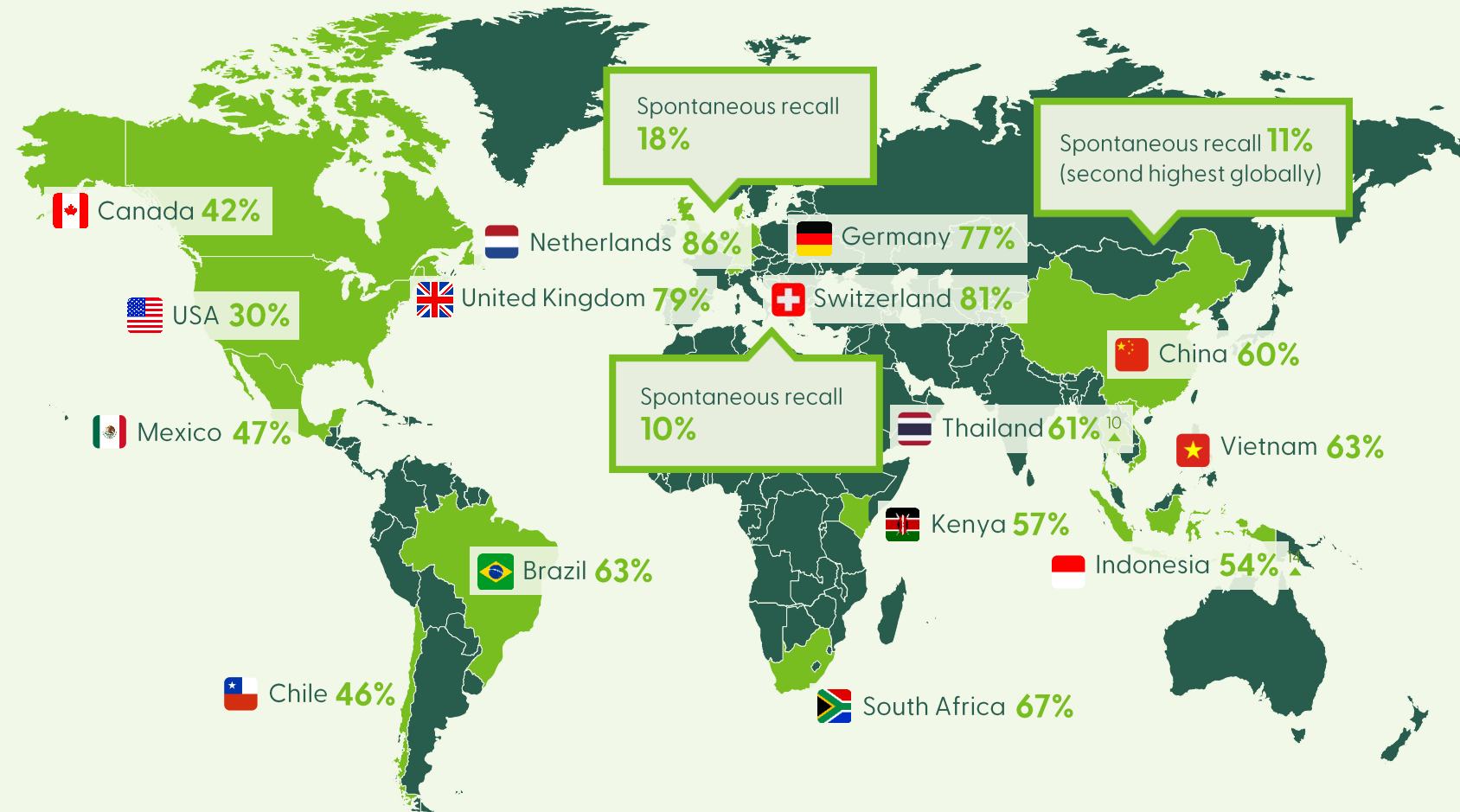
Base: Total global sample (n=40,802)

¹ Totals do not add up to 100% due to rounding off to the nearest whole number
(Seen often = 20.9%; Seen occasionally = 30.6%; Never seen = 35.8%; Not sure = 12.7%)

²This is found on comparing the results across 32 countries which were surveyed both in 2022 & 2025. FSC witnessed a recognition increase in 23 of the 32 countries surveyed in 2022.

FSC is the most recognized global system in 49 out of 50 countries surveyed

FSC is especially well recognized in the Netherlands, Switzerland, United Kingdom, and Germany



REGIONAL AVERAGES:¹

EUROPE	58%
ASIA-PACIFIC	50%
AFRICA	52%
LATIN AMERICA	42%
NORTH AMERICA	36%

Q3. Have you ever seen the following logos or labels? (4-point scale)

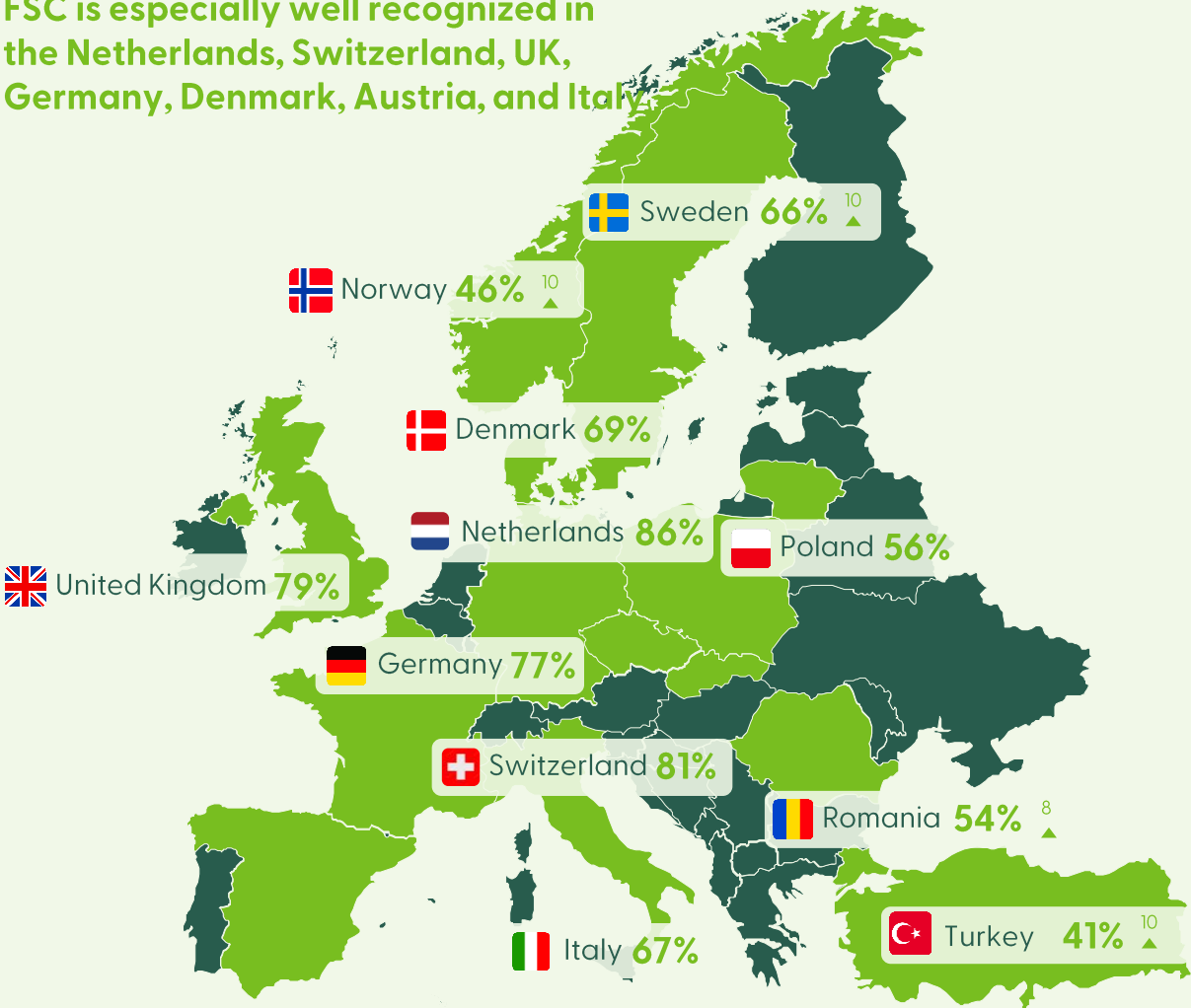
Base: Total global sample (n= 40.802).

1. Note: that the regional averages take into account only those countries that have been surveyed in each region. E.g in Africa this includes 3 countries while in APAC 10 countries

Within Europe, 19,200 consumers were surveyed covering 24 countries



FSC is especially well recognized in the Netherlands, Switzerland, UK, Germany, Denmark, Austria, and Italy



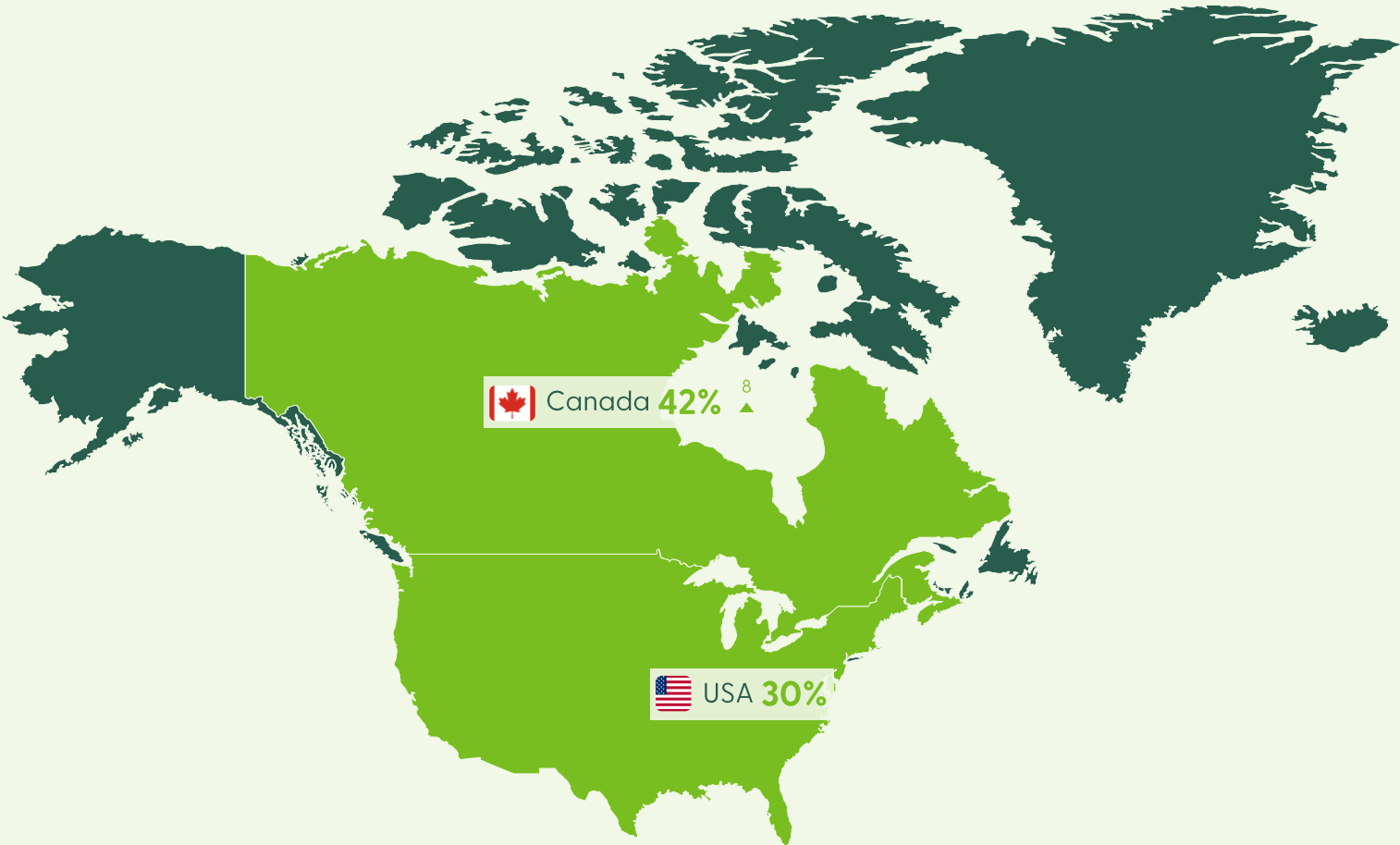
FSC AWARENESS

EUROPEAN AVERAGE **58%**

Netherlands	86%	Poland	56%
Switzerland	81%	Romania	54%
UK	79%	Croatia	53%
Germany	77%	Spain	51%
Denmark	69%	Portugal	49%
Austria	68%	Norway	46%
Italy	67%	Latvia	44%
Belgium	67%	Estonia	44%
Sweden	66%	Lithuania	41%
Finland	65%	Turkey	41%
France	61%	Czech Republic	39%
Slovenia	57%	Ukraine	30%

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n=40802; 24 countries surveyed in Europe, n=800 per market totaling to 19,200 consumers)

In North America, 2,000 consumers were surveyed covering Canada and the USA



FSC AWARENESS

NORTH AMERICAN AVERAGE	36%
CANADA	42%
USA*	30%

*1,200 consumers were surveyed in the USA with a distribution of n=200 in each of the following regions: West Coast, Rocky Mountains, Midwest, Northeast, Southwest, Southeast

In Latin America, 8,000 consumers were surveyed covering 10 countries



FSC is especially well recognized in Brazil but has also strong levels in Chile and Argentina



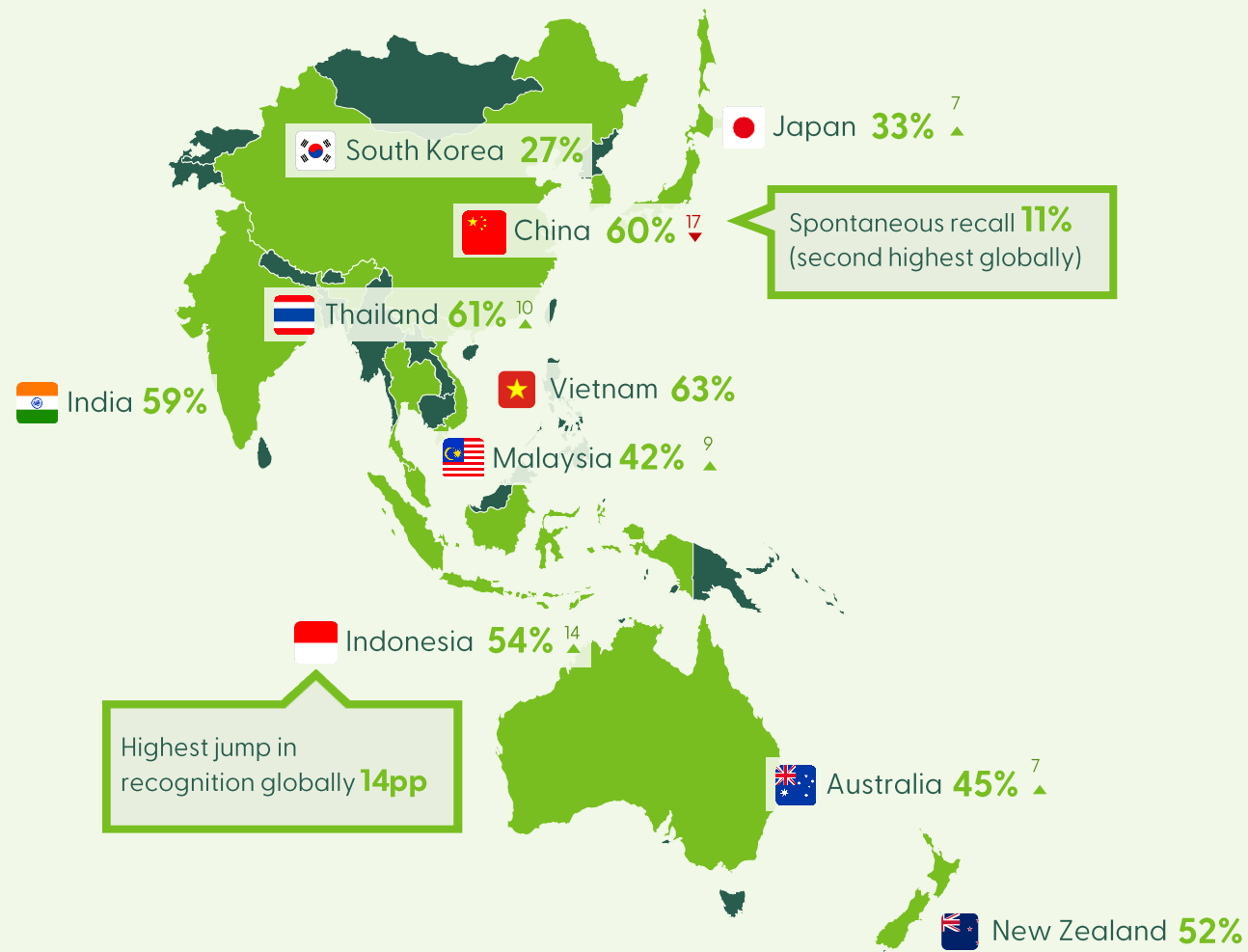
FSC AWARENESS	
LATIN AMERICAN AVERAGE	42%
BRAZIL	63%
MEXICO	47%
CHILE	46%
ARGENTINA	43%
GUATEMALA	42%
PERU	42%
ECUADOR	40%
COLUMBIA	38%
HONDURAS	33%
BOLIVIA	30%

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample n= 40,802; 10 countries surveyed in Latin America, n=800 per market totaling to 8,000 consumers

In Asia Pacific, 8,400 consumers were surveyed covering 10 countries



FSC is especially well recognized in Vietnam and Thailand

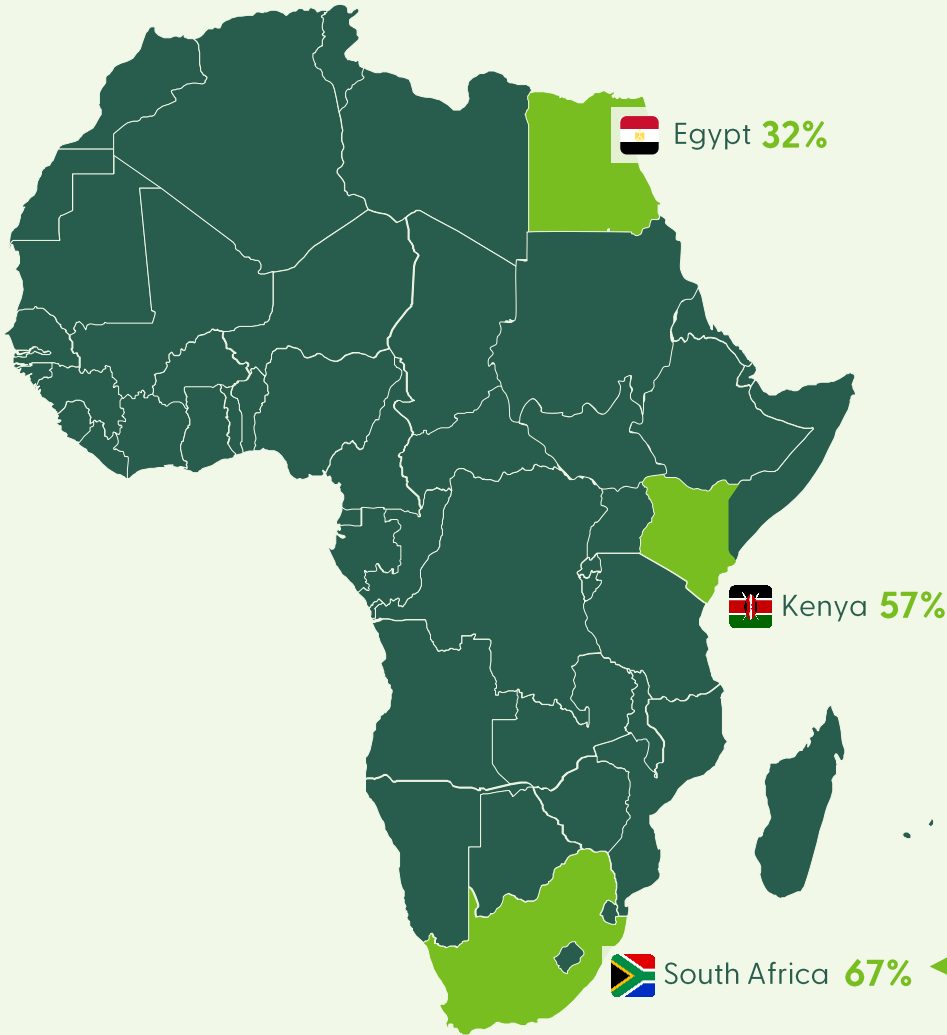


FSC AWARENESS

APAC AVERAGE	50%
VIETNAM	63%
CHINA	60%
THAILAND	61%
INDIA	59%
INDONESIA	54%
NEW ZEALAND	52%
AUSTRALIA	45%
MALAYSIA	42%
JAPAN	33%
SOUTH KOREA	27%

Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample (n=40,802; n=800 per market, except Australia with n=802 and China and USA with n=1,200)
Note: PP = Percentage points

In the African continent, 2,400 consumers were surveyed in Kenya, South Africa, and Egypt



FSC AWARENESS

AFRICAN AVERAGE	52%
SOUTH AFRICA	67%
KENYA	57%
EGYPT	32%

Recognition increased by 8% points since 2022

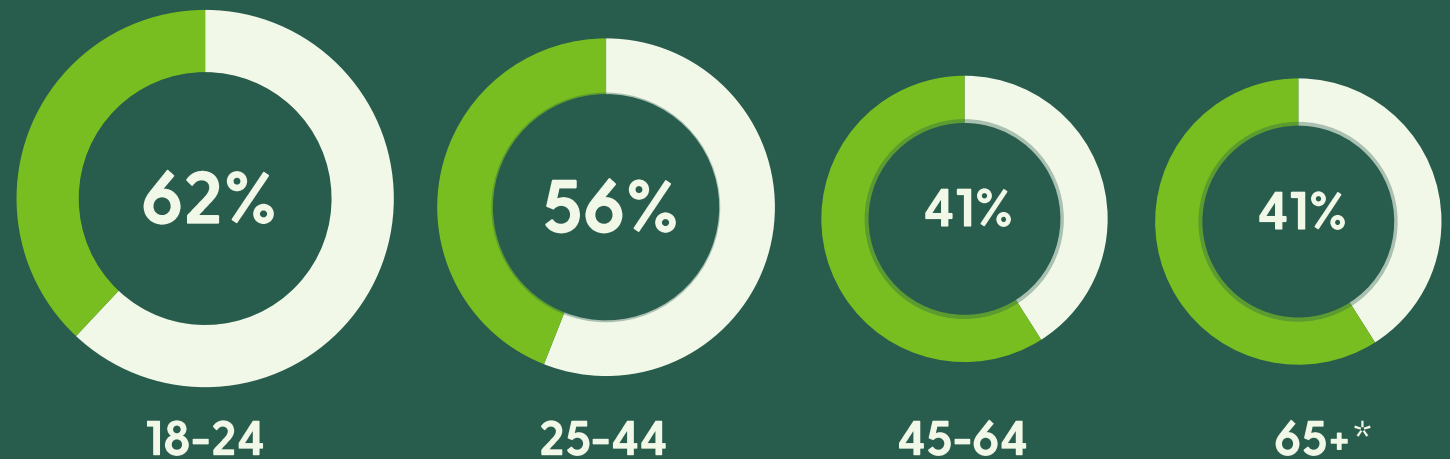
Q3. Have you ever seen the following logos or labels? (4-point scale)
Base: Total global sample (n=40,802; n=800 per market: 3 countries surveyed in Africa, n=800 per market)



FSC has the highest connection with the younger generation



Prompted awareness of the FSC label is highest among young consumers aged 18-24, followed by those aged 25-44, with awareness notably exceeding 50%.



Prompted Awareness of Labels “Seen Often” plus “Occasionally”

Q3. Have you ever seen the following logos or labels? (4-point scale)

Base: Total global sample (n=40,802; 18-24 n=6,297; 25-44 n=19,736; 45-64 n=14,003; 65+ n=766)

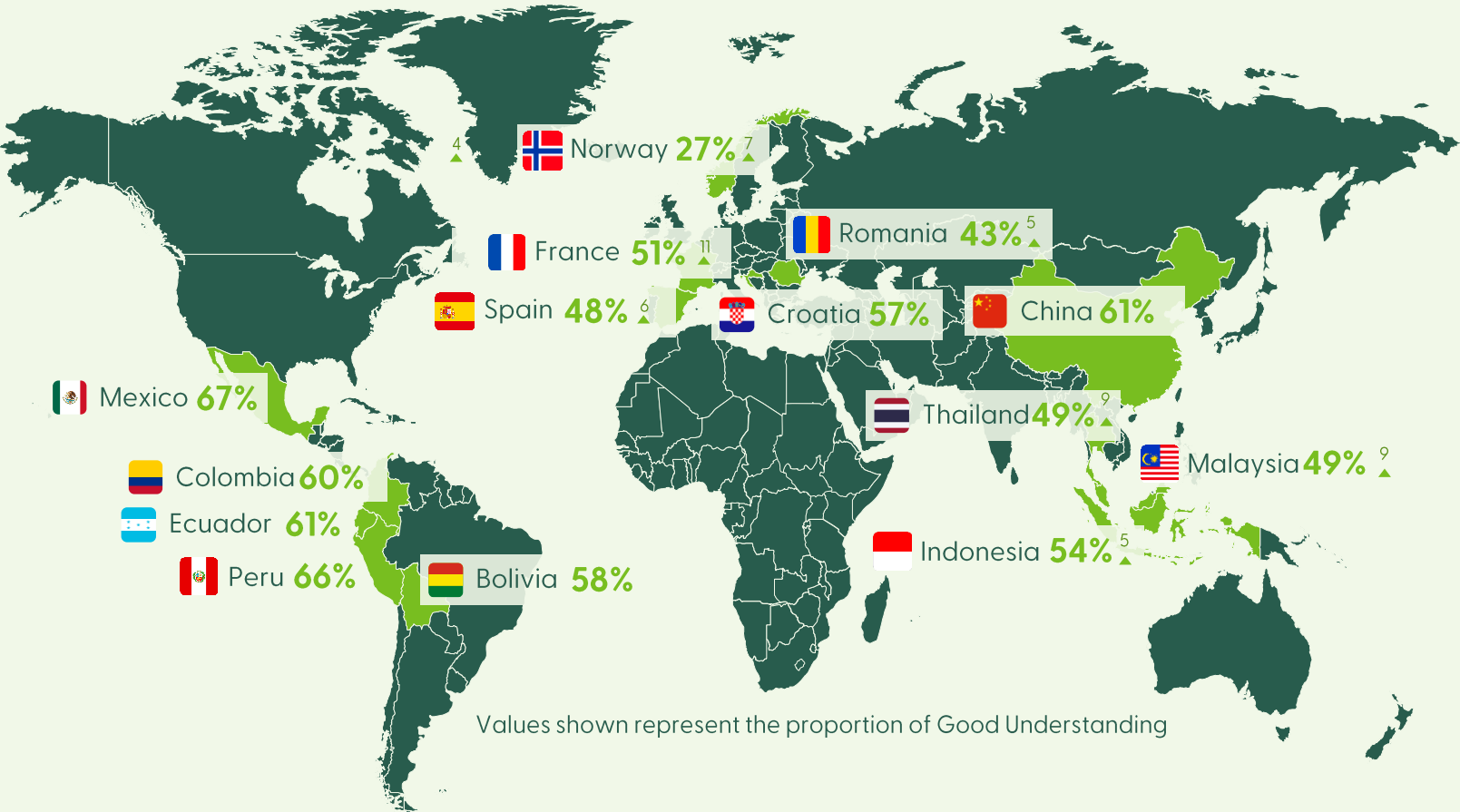
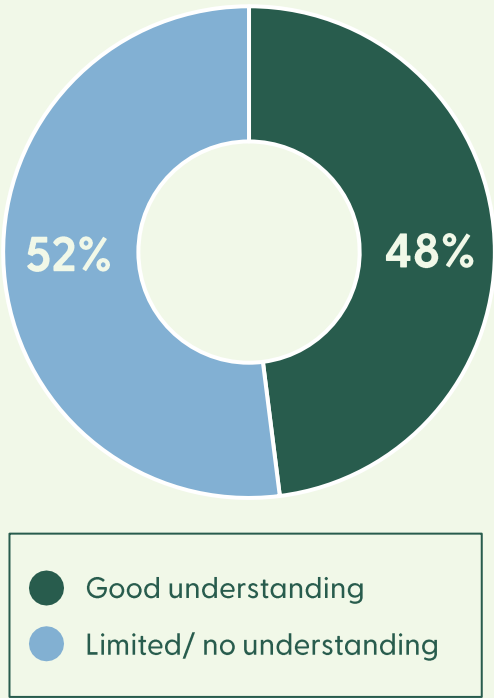
*Not all countries are included in this age group

Understanding of FSC



In the surveyed markets, nearly half of the consumers have at least one association with the FSC logo, which shows a good understanding of FSC. Others have a slightly different understanding, which is not necessarily incorrect.

Association with FSC logo, Open-ended question



Values shown represent the proportion of Good Understanding

Q5. Imagine you saw this image while shopping. What does it mean to you?
Note: Each respondent usually gives more than one answer to an open question. This is the reason why the answers do not add up to 100 per cent.
Base: Total global sample (n=40,802)

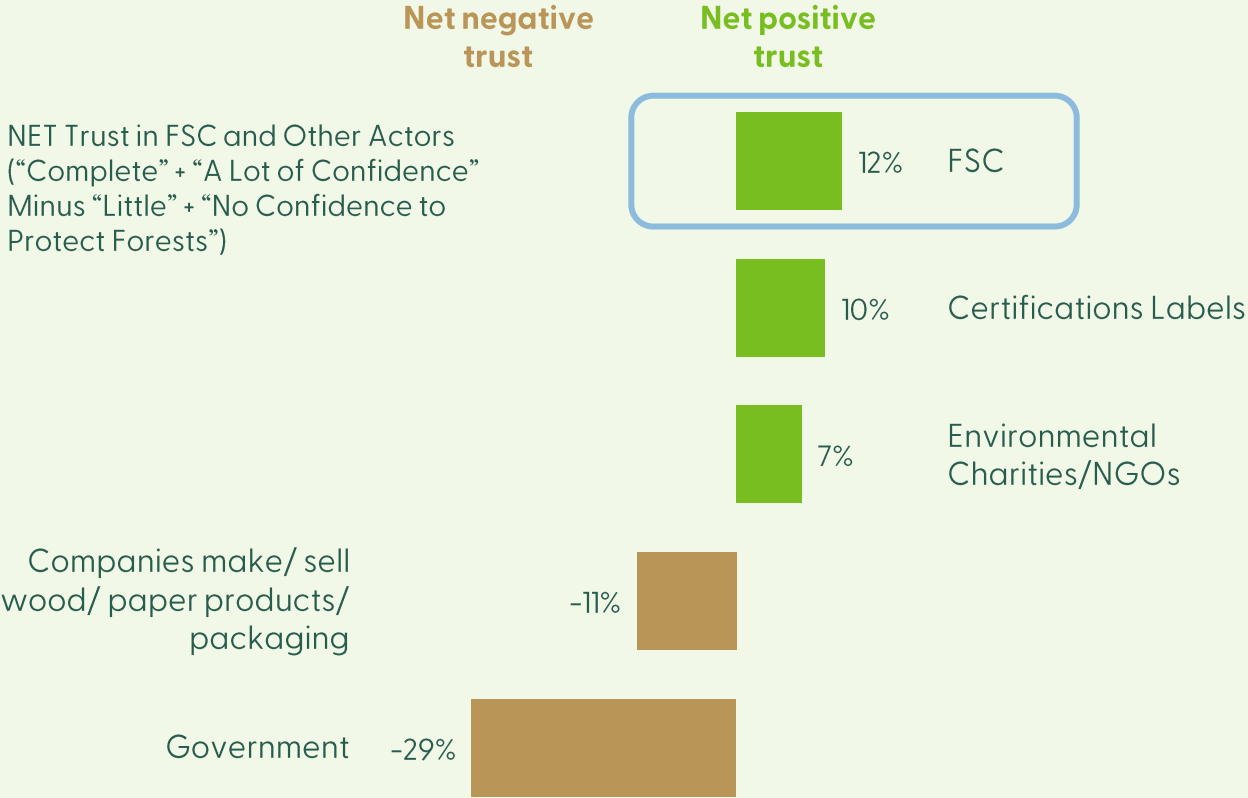


TRUST IN FSC



FSC is the most trusted to protect forests

When compared to other organizations, consumers have the highest confidence in FSC, which is considerably higher than their trust in businesses or governments.

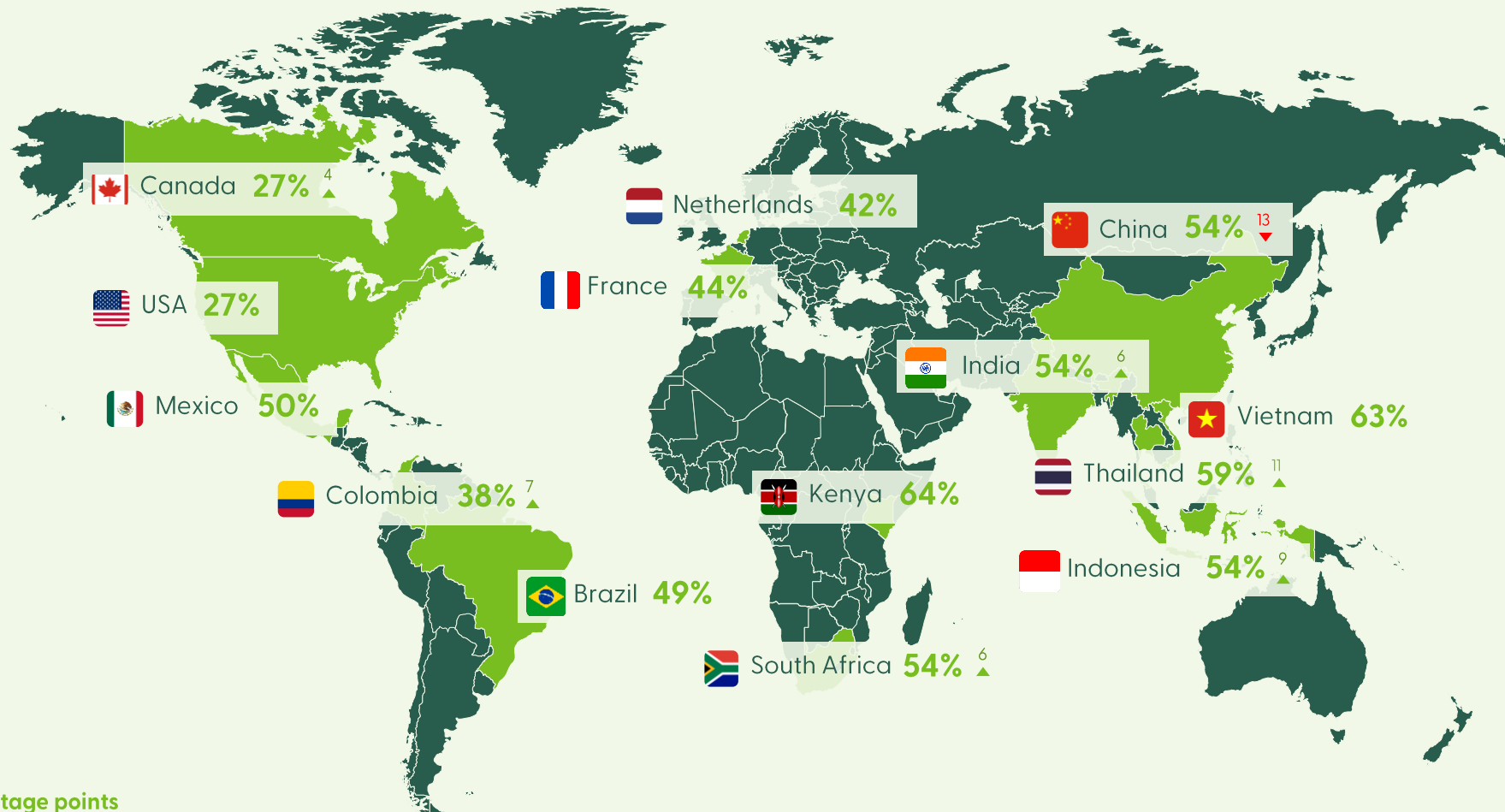


Q8. How much confidence do you have in each of the following types of organizations to protect forests? (5-point scale)
Base: Total global sample (n=40,802)
Trust calculation: (4+5) minus (1+2); positive = greater than zero, negative = less than zero



Consumer confidence in FSC to protect forests has held steady

Trust in FSC has increased significantly in most countries such as Thailand (+11pp*), Indonesia (+9pp), Colombia (+7pp), South Africa (+6pp), and Canada (+4pp)



* PP = percentage points

Q8. How much confidence do you have in each of the following types of organizations to protect forests? (5-point scale)

Base: Total global sample (n=40,802)

Trust calculation: (4+5) minus (1+2); positive = greater than zero, negative = less than zero

High levels of advocacy and purchase impact among those who know FSC



Q6. Based on your knowledge of FSC, how likely are you to do the following?

Base: Total global sample; all who have seen the FSC logo very often or occasionally (n=21,013)

79%
of the consumers
who recognize
FSC trust a
brand carrying
the FSC logo

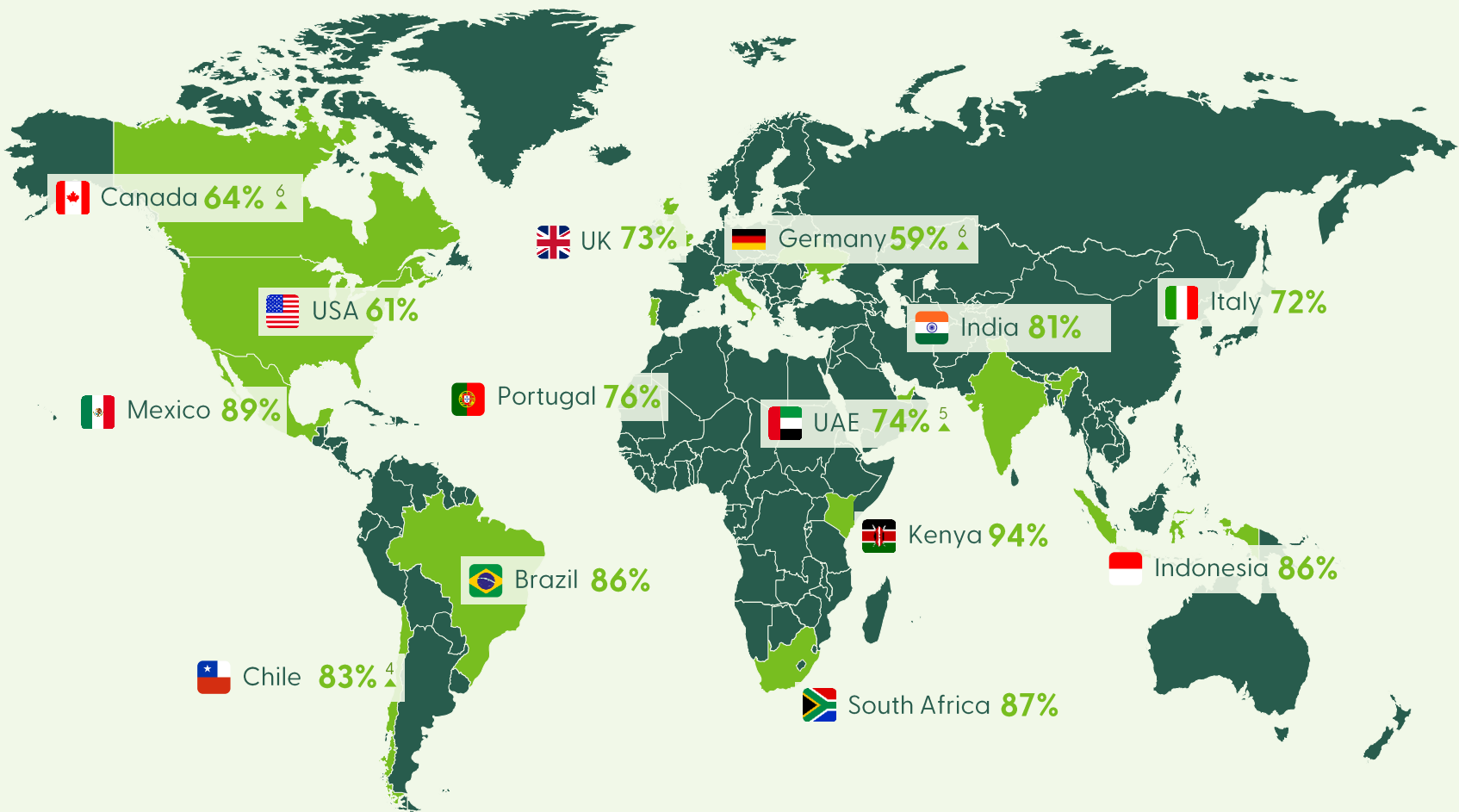
Approximately 4 in 5
consumers who recognize
FSC are more likely to trust
a brand if FSC is present.



Q9. If you learned that a brand promotes, supports or offers FSC-certified products, what influence would it have on your trust in that brand? (5-point scale)

Base: Total of 29 full study countries (n=24,002: Recognizer of FSC (seen often & seen occasionally, according to Q3) n=13,202

In the eyes of consumers, brands who associate with FSC have a clear market advantage



REGIONAL AVERAGES¹:

EUROPE	66%
ASIA-PACIFIC	74%
AFRICA	84%
LATIN AMERICA	86%
NORTH AMERICA	63%

Influence of FSC on Brand Trust, (“Very positive influence” + “Positive influence”)

Q9. If you learned that a brand promotes, supports or offers FSC-certified products, what influence would it have on your trust in that brand? (5-point scale)

Base: Total of 29 full study countries (n=24,002; n=800 per market, except Australia with n=802 and China and USA with n=1,200)

1) Based on the number of countries surveyed in each region for this survey.

Consumers see forests as climate's frontline; FSC as the trusted guide



Forests remain
generally where
people feel climate
change most directly



Consumers still
act on climate
at the checkout



Independent
sustainability
certifications are
regarded as crucial
tools for driving change



FSC is the clear global
leader as the most
recognized forest
certification system



Consumers trust FSC
more than
governments or
private companies to
protect forests



In the eyes of
consumers, brands
who associate with
FSC have a clear
market advantage



One of the world's
largest consumer
surveys about forests,
**engaging 40,802
consumers across 50
markets**, has been
conducted by globally-
renowned research
agency IPSOS on
behalf of FSC.

Summary:

Forests remain generally where people feel climate change most directly

- While “climate change” may rank lower as an abstract global issue in the 50-country snapshot, across the 29-country forestry module markets the impacts felt through forests – wildfires, droughts, floods, and biodiversity loss – rank among the top concerns within the forestry sector.
- “Loss of plant and animal species” and “deforestation” consistently appear among the most pressing forestry issues in these markets.

Consumers still act on climate at the checkout

- Consumer behavior reveals strong climate values, with 72% of global consumers across 29 markets saying they prefer products that do not harm plants or animals.
- 62% try to buy products packaged with renewable materials such as paper instead of plastic.

Independent sustainability certifications are regarded as crucial tools for driving change

- A significant proportion of consumers (65%) believe independent certification is essential to validate sustainability claims.
- 61% believe they can help to protect forests by purchasing products that have been certified by an independent organization.

FSC is the clear global leader as the most recognized forest certification system

- Recognized by one in two people globally – 52% of consumers across 50 countries recognize the FSC logo when prompted.
- FSC is #1 in forest-related products in 49 out of 50 countries surveyed.
- Brand recognition has increased by 5% points since 2022, demonstrating growing visibility and relevance.
- Recognition is highest in Europe, especially in the Netherlands (86%), Switzerland (81%), the UK (79%), and Germany (77%).
- FSC dominates among younger consumers (18–24), outperforming other certification systems tested.

Consumers trust FSC more than governments or private companies to protect forests

- 35% of consumers trust FSC to protect forests, compared to 24% for private companies and 19% for governments.
- Trust is especially high in Kenya, Vietnam, and Thailand, where at least 6 in 10 consumers show high confidence in FSC.
- In Europe, France, the Netherlands, and Switzerland lead in trust, with approximately 4 in 10 consumers expressing confidence in FSC.

Brands that associate with FSC have a clear market advantage

- Approximately 8 out of 10 consumers who recognize the FSC logo trust brands that use it
- 6 out of 10 consumers who have seen the FSC logo say they would (definitely or probably) choose an FSC certified product instead of an equivalent non-certified product.



One of the world’s largest consumer surveys about forests, **engaging 40,802 consumers across 50 markets, has been conducted by globally-renowned research agency IPSOS on behalf of FSC.**



IPSOS is your strong, globally positioned, competent partner, who has:

- expertise in coordinating such projects and knows where the methodological pitfalls lie
- access to high quality panels
- great experience in dealing with and evaluating country-specific results, and
- is highly competent in interpreting the data due to our global market research experience.

IPSOS is the third largest market research company in the world, present in 90 markets and employing more than 18,000 people. “Game Changers” – our tagline – summarizes our ambition to help our 5,000 clients to navigate more easily our deeply changing world.

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The Forest Stewardship Council® (FSC®) is a world leader in sustainable forestry and provides trusted solutions to help protect forests and tackle today’s deforestation, climate, and biodiversity challenges.

FSC operates the most rigorous forest certification system. Over 150 million hectares of forest, and 65,000+ organizations who produce or sell forest products are certified according to the FSC standards.

The “check tree” label is found on millions of products worldwide, verifying sustainable sourcing from forest to shelf.

Join our mission to protect the world's forests.

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There's more where that came from.

For regional or country insight, scan the QR code to:

 **Connect with your local FSC team for tailored insights**

 **Download assets to communicate the results**



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