

**ECE/TIM/DP/20**

**GENEVA TIMBER AND FOREST DISCUSSION PAPERS**

**FOREST CERTIFICATION UPDATE FOR THE ECE REGION,  
SUMMER 2000**

*by*

*Eric Hansen, Keith Forsyth and Heikki Juslin*

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### **Abstract**

Forest Certification Update for the ECE Region is the third in series of Geneva Timber and Forest Discussion Papers to present developments in certification of sustainable forest management in the UN-ECE region of Europe North America and the Commonwealth of Independent States. This update from summer 2000 has chapters of major developments in each of the three subregions, as well as discussions of the marketplace for certified forest products, thoughts for the future of certification of sustainable forest management and list of references.

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**UN-ECE/FAO TIMBER AND FOREST DISCUSSION PAPERS**

The objective of the Discussion Papers is to make available to a wider audience work carried out, usually by national experts, in the course of ECE/FAO activities. They do not represent the final official output of the activity, but rather a contribution which because of its subject matter, or quality, or for other reasons, deserves to be disseminated more widely than the restricted official circles from whose work it emerged, or which is not suitable (e.g. because of technical content, narrow focus, specialised audience) for distribution in the UN-ECE/FAO Timber and Forest Study Paper series.

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In the interests of economy, Discussion Papers are issued in the original language only. They are available on request from the secretariat. They are distributed automatically to nominated forestry libraries and information centres in member countries. It is the intention to include this discussion paper on the Timber Committee website at: <http://www.unece.org/trade/timber>. Those interested in receiving these Discussion Papers on the continuing basis should contact the secretariat.

Another objective of the Discussion Papers is to stimulate dialogue and contacts among specialists. Comments or questions should be sent to the secretariat, who will transmit them to the authors.

## Preface by the secretariat

Certification of sustainable forest management has accelerated in the UN-ECE region of Europe, North America and the Commonwealth of Independent States. The ECE Timber Committee has a mandate to follow the market developments for certified forest products and this paper updates the developments in the region.

The Committee holds an annual discussion at its session on the markets for certified forest products. In preparation for that discussion, the *Forest Products Annual Market Review*, an issue of the *Timber Bulletin*, now has a regular chapter on certified forest products markets. Also in preparation for the market discussions, member countries submit market reports which include a section on certified forest products markets. The reports received in electronic format may be found on the Committee's website at the address below. Following the Timber Committee Session a press release is issued which contains a section on certified forest products markets. The press release is also on the website.

The FAO European Forestry Commission also follows developments in certification systems and is most interested on their impacts on forest management. The Commission and the Committee had a joint Team of Specialists on Certification whose final activity in 1998 was a workshop on "Certification of Sustainable Forest Management in Countries in Transition". At that workshop a "continued exchange of information both within and between countries was recommended to monitor progress in certification throughout Europe." This *Discussion Paper* serves as an important step towards that goal.

The secretariat would like to thank the authors, Dr. Eric Hansen, Mr. Keith Forsyth and Dr. Heikki Juslin for gathering the currently available information and writing this update of the many certification initiatives in the ECE region. This *Discussion Paper* is not meant to be an all-inclusive source of information on certification. For example, information in their two previous *Discussion Papers*, i.e., *The Status of Forest Certification in the ECE Region* (1998) and *Forest Certification Update for the ECE Region, Summer 1999*, is not repeated (these former papers may be found on the Timber Committee website). Rather the authors chose developments to report which have occurred since their last paper. It was through their generosity, and that of their employers, that we are able to continue to discuss and publish current, objective information regarding the status of certification of sustainable forest management and their impacts on forest products markets.

Your comments on this update will be referred to the authors. Likewise information for future updates would also be welcome.

Timber Section  
UN-Economic Commission for Europe  
Palais des Nations  
CH-1211 Geneva 10, Switzerland  
Fax: +41 22 917 0041  
E-mail: [info.timber@unece.org](mailto:info.timber@unece.org)  
<http://www.unece.org/trade/timber>

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## Chapter 1 – INTRODUCTION

Forest certification continues to evolve and develop. This Discussion Paper builds on two previous Geneva Timber and Forest Discussion Papers (Hansen & Juslin 1998, Hansen et al. 1999), is designed to provide a summary of key certification developments during the period of August 1999 to June 2000, and is based primarily on secondary data collected by the authors. The Discussion Paper assumes the reader is familiar with the content in the previous Discussion Papers on certification. For information from the ECE, see <http://www.unece.org/trade/timber/mis/cfp.htm>.

While data concerning demand for and supply of certified products is still scarce, there is a growing body of information about the various systems. For example, the Confederation of European Paper Industries recently published a comparative matrix of forest certification schemes (CEPI 2000). This paper covers only the ECE Region (Europe, North America and the Commonwealth of Independent States).

A plethora of systems describes the current state of forest certification in the ECE region. There are examples of multinational companies that have operations in different regions using the FSC, PEFC, ISO, and SFI systems. Those operations might be buying fibre from landowners that operate under other systems such as the American Tree Farm System. This growing complexity has resulted in multiple calls for mutual recognition among systems.

## Chapter 2 – STATUS OF INTERNATIONAL SYSTEMS

### International Organization for Standardization (ISO)

A number of companies in the forestry and wood products industry are using ISO14001. At the end of 1999, ISO records showed that a total of 14,106 ISO 14001 certificates had been issued, an increase of over 300% when compared to the 1997 figure of 3,454 (Graph 1). Of the total number of certificates, 10,881 were classified into industrial sectors. Certificates issued in the ‘Pulp, Paper and Paper Products’ sector totalled 232, while certificates issued in the ‘Wood and Wood Products’ sector totalled 109.

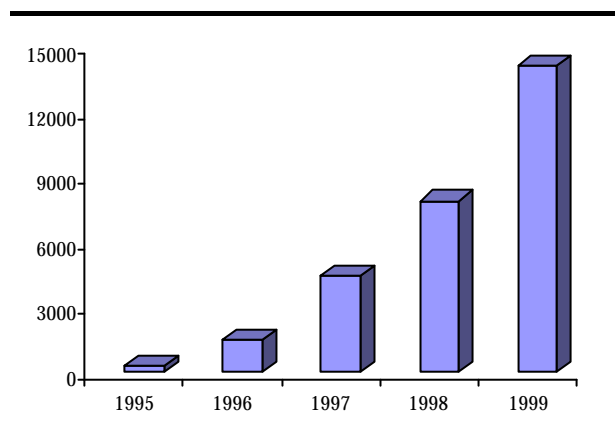
The general ISO statistics are not indicative of the significant trend within forestry corporations of using ISO 14001 not only in their manufacturing operations but also their forestry operations. The international nature and wide flexibility in designing a forest

management standard offered by the ISO system make it very attractive to multi-nationals.

### Forest Stewardship Council (FSC)

The area of FSC certified land was above 18 million hectares at one point in the past 12 months, but was approximately 17.6 million as of the end of June 2000. This is approximately 1.4 million more than reported in last year’s Discussion Paper (Graphs 2 and 3). Sweden still dominates with approximately 9 million hectares, or over half of the total FSC certified land. According to FSC’s first quarter 2000 report, the number of chain of custody certificates was 735 in a total of 37 countries and membership of FSC had climbed to 369. A total of 9 certifiers now have FSC accreditation and 7 await approval (FSC 2000).

GRAPH 1  
ISO 14001 environmental management system certificates, 1995-1999



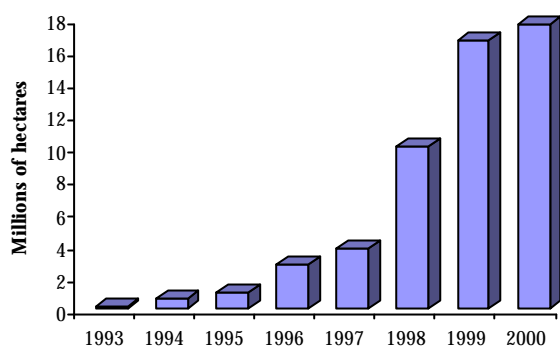
Source: ISO, 1999.

FSC has begun an advertising campaign using Pierce Brosnan (James Bond). In the U.S., the ad was seen in magazines such as People, TIME, Playboy, and others with a total circulation of over 11 million. The concept behind the advertisement was to reach the average consumer. The text of the advertisement states, “You don’t have to be a movie star to be an action hero. Help conserve the world’s forests. Look for and purchase products carrying the FSC label” (FCW 1999).

The current status and future of FSC certification was highlighted at the WWF Millennium Forests for Life Conference and FSC Trade Fair held in London in June 2000. The trade fair consisted of nearly twice as many exhibitors as a similar fair the previous year and attendance was approximately triple, estimated at 1000. WWF claimed that attendees at the conference and fair represented 50 different countries and approximately 1/3 of the total timber harvested in the world each year.

GRAPH 2

## Area of FSC-certified forestland, 1995-2000



Source: FSC, 2000.

A variety of changes are expected with FSC in the near future. The next phase of FSC development is expected to include a broadening of scope to take a leadership role in the overall certification movement, expansion from a skeletal staff, and specifically hiring someone to specialise in small owners/businesses. Sustainable funding will be a key area of concentration. There will be a new addition of an executive director to share responsibilities with the current director and concentrate on funding issues (Synnott 2000). WWF predicts a 10-fold increase in FSC certified land area by 2005 (Dixon and Falwell 2000).

Regional standards are being developed in at least 30 countries and regions. However, only four standards (Sweden, Bolivia, Canada Maritimes, United Kingdom) have received full endorsement by FSC (Amariei 2000).

FSC has changed its percentage-based claims policy. The new policy allows lower percentages of FSC certified content in some cases. The basics of the changes are outlined below.

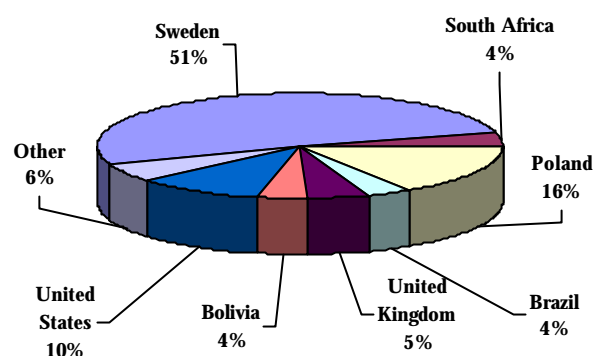
For chip and fibre products the minimum content of FSC virgin wood is 30% of the total virgin wood chip or fibre materials. This minimum will increase to 50% in 2005. Companies producing at this level will be required to develop an action plan for continuous increase in the percentage of certified material to meet the 2005 increase.

In chip and fibre products containing recycled or other neutral materials, the FSC material requirement remains at 17.5% of virgin fibre. In total, recycled or other neutral materials are allowed up to 82.5%.

For solid and assembled products, claims are possible for collections of solid wood items and for assembled components of solid wood. The percentage threshold is 70%.

GRAPH 3

## Distribution of FSC-certified forestland, 2000



Source: FSC, 2000.

To make percentage based claims, a company must operate a system to avoid unacceptable sources of uncertified wood and this will be monitored by the certifier (FSC 2000).

This new policy will likely lead to a splash of new chain-of-custody certified companies and new products on the market. For example, CSC claims to be the world's first company to offer FSC certified oriented-strandboard (Anon. 2000a).

FSC plans its next Annual Conference for November of 2000. The theme is "Certification for the People" and concentrates on social issues (FSC 2000).

### Pan European Forest Certification Scheme (PEFC)

The Pan European Forest Certification Scheme (PEFC) is a framework for the mutual recognition of national forest certification schemes. It is a common misconception that PEFC only works on certification issues in Europe. In reality, PEFC focuses on Europe but is global in its coverage and will endorse certification standards worldwide. PEFC was initiated in August 1998 and launched in Paris in June 1999. The past year has seen active development and finishing of various components of the scheme. Now PEFC has endorsed the first national certification schemes and provides chain-of-custody certification and an accompanying PEFC-logo (Hansen et al. 1999, PEFC 2000).

PEFC mainly originated from forest owner organisations in six countries and has grown to include a range of countries and the forest industry. Eleven countries signed the statutes of PEFC in Paris (1999). The following fourteen countries have their own



National PEFC Councils and are members of the international PEFC Council (PEFCC): Austria, Belgium, Czech Republic, Denmark, France, Finland, German, Ireland, Latvia, Norway, Portugal, Spain, Sweden and Switzerland. Membership is expected to grow as several countries make preparations for their own forest certification institutions and membership in PEFC (PEFC 2000).

Interest in PEFC is high inside and outside Europe as indicated by participation of 32 countries in the second General Assembly and international seminar of PEFC at the end of 1999. The strength of PEFC is that it has the support of European forest owners and the potential for 100 million hectares of certified land within the next five years. The weakness of and a possible threat to PEFC is the lack of support of Environmental NGOs. How the markets will react is not yet known but preliminary reactions from industrial customers have been positive or neutral.

PEFC works through its:

- General assembly of PEFC Council
- Board of Directors
- Working groups

The issues under preparation for the decision-making bodies can be seen from the names of the Working groups:

- Technical Working Group
- Chain of Custody Working Group
- Mutual Recognition Working Group
- Non-Wood products Working Group (PEFC 2000)

The PEFC Technical Document and Statutes define the basic requirements of forest certification and set up of institutional arrangements at the Pan-European, national and sub-national levels. For example, the following central documents have been completed during the past year:

- Procedures for assessment of national certification schemes and procedures
- Certification criteria and procedures
- Rules for verification of chain of custody
- Rules and guidelines concerning the PEFC trademark and logo

PEFC has been an active advocate of mutual recognition. Conditions are different in various parts of the world and it is natural that worldwide there are an

increasing number of forest certification schemes. However, markets are global and global compatibility of various schemes is needed. The PEFC strategy includes an open dialogue and contact and network building with other important certification systems. The ultimate goal is to arrive at an international framework system of mutual recognition, which will link the different credible SFM standards and certification systems developed independently around the world (PEFC 2000).

Outside observers (e.g. USA, Canada, Malaysia, New Zealand and several countries in Eastern Europe) have been invited to participate in PEFC meetings. This is in accordance with the aim of mutual recognition amongst various certification schemes. In the Prague meeting, after analysis of Helsinki, ITTO and Montreal process principles and criteria, it was noted that there are no principled obstacles in the way of mutual recognition of the schemes from respective countries (Lintunen 1999). PEFC organised the First Global Forest Certification Mutual Recognition Seminar in June 2000 and a follow up seminar will be held in November 2000. Work for mutual recognition systems and further national schemes are in progress.

Communication, sharing experience and education have been an integral part of PEFC's and its member countries' activities during the previous year. Seminars have been arranged in eastern European countries where SFM standards and forest certification schemes are now being developed.

The first national certification schemes for conformity assessment with the PEFC Framework came from the three Nordic countries Finland, Norway and Sweden. After an official public consultation period and rigorous assessment by independent consultants, it was concluded that they met the requirements of the PEFCC. After a vote the forest certification schemes were endorsed by the PEFCC. These three Nordic national schemes account for 18 million hectares of independently certified forests and this area is forecast to increase to 27 million hectares by the end of the year (PEFC 2000).

The national forest certification schemes of Germany and Austria are under official public consultation and a couple of other members have announced that they will apply for the assessment and endorsement in the near future.



## Chapter 3 – PROGRESS IN EUROPE

The following discussion does not comprehensively cover the whole of Europe. For example, the state owned forests in Ireland (Coillte) are currently undergoing an FSC certification process (summer 2000) of just over 435,000 hectares. Coillte anticipates the ability to market certified logs as soon as the end of 2000. This will be significant for several multi-national companies producing panels in that country. The discussion does address the most significant developments during the past year.

### Sweden

In Sweden, different types of owners are adopting different certification schemes. The large forest industry companies have FSC certified their forests and non-industrial private forestland (NIPF) owners have adopted PEFC. There are currently about 9 million hectares of FSC certified forests and the area has remained about the same since January 1999 (FSC-Sverige 2000). About 75 % of the area is owned by the three largest forest industry companies in Sweden (Assi Domän, SCA Skog and Stora Enso) (Hornborg 2000). Only minor areas of NIPF owned forestlands have been FSC certified.

After leaving the FSC Working Group in 1997, the regional forest owner organisations began development of forest certification based on ISO 14000 standards or EMAS. This work has been a base and background for the Swedish PEFC Scheme.

In June 1999, the Swedish PEFC Council was formed for the national PEFC process. The forest owners associations and private independent sawmills were behind the initiative. Relevant stakeholders were invited to participate in the process. The performance standard and the environmental management system models were based on experiences from certification of Swedish Family Forestry that started in 1998. This certification has included more than 1 million hectares and is based on group certification. A typical Umbrella for group certification is comprised of 5,000–10,000 forest owners. Organisations providing forest services in handling the chain of custody from stump to roadside must also be certified. Accreditation practices have been elaborated in close contact with the Swedish accreditation institute SWEDAC (PEFC 2000).

In December 1999, the national PEFC scheme was submitted to the Board of Directors of PEFC for conformity assessment and endorsement. In March

2000 the PEFC Council announced an official public consultation period. Based on the assessment made by independent consultants the PEFC's Board recommended the approval of the Swedish PEFC Scheme and it was endorsed by the PEFC in May (PEFC 2000).

### Norway

Forest certification in Norway is based on the Living Forest (LF) project initiated in 1995. The Norwegian process is different from many others since all relevant stakeholders have co-operated throughout the process, researchers have actively participated in the process, and the education of forest owners has been intensive. The Norwegian standards of SFM were agreed on in March 1998 and the scheme is based on ISO 14000 standards.

In Norway, more than 80 % of the forests are owned by NIPF owners. They sign a commitment to comply with the LF standards in all forest operations. These contracts are between the single forest owners and the Forest Owner's Associations to which forest owners sell their timber. Over 53% of the annual 7 million m<sup>3</sup> of timber harvested is certified and this figure is expected to rise to 90% by the end of the year 2000 (PEFC 2000).

The Norwegian Governing Body of PEFC, named PEFC-Norway, was founded on the 21<sup>st</sup> of June 1999. The objective of PEFC-Norway is to organise the implementation of forest certification based on LF standards for SFM, in accordance with the PEFC Scheme.

Norway's application for conformity assessment of the LF standards and certification scheme with the requirements of PEFC was dated the 30<sup>th</sup> of November. In March 2000, the PEFC Council announced an official public consultation period. Based on the assessment made by independent consultants, the PEFC's Board recommended the approval of the Norwegian Scheme and it was endorsed by the PEFC in May of 2000 (PEFC 2000).

### Finland

After preliminary study in 1994 and an effort at Nordic Forest Certification in 1995-96, the Finnish Forest Certification System (FFCS) has been developed. The work has aimed at a system suitable for small-scale family forestry. FFCS is a national, independent forest certification system without a logo for product labelling, but has been developed bearing in

mind compatibility with the international certification schemes (FSC, PEFC) and environmental management systems (ISO).

FFCS is based on regional group certification. The areas of the first seven Forestry Centres were audited during summer and early fall of 1999. Both foreign and domestic independent certifiers were used (Det Norske Veritas and SFS Certification). After dealing with some corrective actions, all seven Forestry Centres received a certificate. It meant that some 13.5 million hectares of Finnish forests were certified before the end of 1999. Around 180,000 Finnish forest owners have already committed themselves to certification. The certified forest area is expected to be 22 million by the end of 2000 making Finland the largest holder of certified forests in the world (FFCS 2000).

In November 1999, FFCS submitted an application to the Board of Directors of the Pan European Forest Certification Council (PEFCC) for conformity assessment and endorsement. In March 2000, the PEFC Council announced an official public consultation period. Based on the assessment made by independent consultants, the PEFC's Board recommended the approval of the FFCS and it was endorsed by the PEFCC in May (PEFC 2000).

Demand for certified forest products is still seen as low and targeted to low-volume speciality products. Very few customers ask for labelled products. However, the demand is estimated to increase in the future (Valtanen 2000). After endorsement of the FFCS the reactions of the industries have been neutral or passive. Generally, it is claimed that telling industrial customers about the certification is sufficient and thus far the label is not that important (Valtanen 2000). Paper companies have not hurried to get chain-of-custody certification. Thus far, one chain-of-custody certificate has been granted to a sawmilling company.

Most Finnish forest industry companies have adopted ISO-based environmental management systems to cover the manufacturing operations and broadened them to also cover forestry operations.

## Denmark

Since the establishment of the FSC working group in 1996, one forest area (36 hectares of private natural forest) has been certified according to the FSC standard. Relatively more success has been achieved with regard to chain of custody certification. An increasing number of Danish wood products companies have achieved FSC chain of custody certification. The list includes furniture manufacturers, window and door manufacturers and a timber trader. With a relatively

small area of forest certified domestically, many of these companies utilise FSC certified timber imported from Sweden and other countries.

Six Danish companies, including IKEA International, are members of the Nordic Forest and Trade Network group (part of WWF's Global Forest and Trade Network). The Nordic group has a total membership of 33 and represents companies in Denmark, Norway, Sweden and Finland (Table 3). Five out of the six Danish companies trade primarily in garden furniture made from tropical timbers. Interest amongst wood processing companies is said to be growing and a number of additional Danish companies are likely to join the group by the end of 2000 (Rainey 2000).

The founding meeting of the Danish PEFC group took place in September 1999. Since then, two Working Groups have been established: Working Group 1 is currently designing the certification system and process, while Working Group 2 is formulating the forest standard. The standards that are being developed are based on SFM guidelines, which were developed during a national process involving a range of stakeholders.

## United Kingdom

The UK Woodland Assurance Scheme (UKWAS) and the FSC standard have dominated forest certification developments in the UK over the past year. UKWAS – the national voluntary certification initiative that is supported by the Government, wood processing companies, private forest owners and environmental groups - was launched in June 1999 and was formally endorsed by the FSC in November 1999. This endorsement enables forests, which are audited according to UKWAS by FSC accredited certifiers to use the FSC logo.

In May 2000, almost 877,000 hectares of forest had been certified according to the UKWAS/FSC standard, making the UK the fourth largest holder of FSC certified forests in the world. Forest Enterprise, the agency that manages public forests in the UK, has achieved UKWAS/FSC certification for 833,000 hectares under its management. Certification of this area is estimated to have brought 5-6 million m<sup>3</sup> of certified wood into the market.

While there has been a rapid increase in the production of certified wood, chain of custody certification has not taken place at a comparable rate. This has caused missing links to appear in the supply chain and resulted in certified wood not being labelled as such when it comes to the market. This problem is

currently being addressed with a significant increase in the number of chain of custody certificates expected.

Although endorsed by the FSC, UKWAS is not exclusively tied to the FSC. A key issue regards the possibility of UKWAS being endorsed by PEFC. The inaugural meeting of PEFC UK took place in May 2000 and it is planned that the option of PEFC endorsing UKWAS will be discussed at future PEFC UK and UKWAS Steering Group meetings. This may lead to a national certification initiative (UKWAS) being endorsed by two international initiatives (FSC and PEFC). That said, it is not a foregone conclusion that UKWAS will seek PEFC endorsement.

ISO14001 has become increasingly popular in the UK. More than 100 companies (in all industry sectors) have achieved ISO 14001 certification, with more than 12 companies in the wood products sector gaining certification (BSI 2000). During 1999, a large increase in the number of timber and furniture companies adopting ISO14001 was reported (Anonb 2000). Club Green, which has over 100 members, has helped many companies in their efforts to become certified. Some of the leading companies in the wood products industry in the UK have now achieved ISO14001 certification: James Jones & Son, Kimberly-Clark, Smurfit, FW Mason & Sons and Stewart Milne Timber Systems.

## Germany

There are two main certification initiatives developing in Germany: the FSC standard and the German Forest Certification System (GFCS). More than 1.5 million hectares have been certified according to the GFCS, which is supported by forest owners, the national forest service, timber industry organisations, environmental groups and PEFC Germany. The GFCS was submitted to the PEFC for endorsement in March 2000 and is expected to be PEFC endorsed later in 2000. It is estimated that 7.5 million hectares (70% of the wooded area in Germany) will be certified according to GFCS/PEFC within two years (Teegelbeekers 2000).

Approximately 120,000 hectares have been certified according to the FSC standard (May 2000). This represents a five-fold increase when compared to the area certified in mid-1999.

The German organisation that is part of WWF's Global Forest and Trade Network (Gruppe 98) was established in 1997 and in June 2000 had 58 members, an increase of 17 members (29%) when compared to the same time last year.

## Austria

A PEFC working group was formed in June of 1999. The group is made up of 34 member organisations representing approximately 80,000 members (Weinfurter 2000). In April of 2000, PEFC Austria submitted an application for conformity assessment and endorsement by the PEFC Board. Public comment was requested up until July 5, 2000. There are over 200,000 forest owners in Austria accounting for approximately 4 million hectares (PEFC 2000). For PEFC certification, Austria is divided into nine regions (Czamutzián 2000).

Three Austrian forest owners are currently pursuing FSC certification (approximately 3,500 hectares) and there is some expectation that the next year could see over 50,000 hectares certified according to FSC (Katjejsky 2000).

## France

In comparison to other countries, the FSC has seen limited development in terms of forest certification in France. In May 2000, one forest area (1,050 hectares of private plantations) had been certified according to the FSC standard. This certification was reportedly driven by pressure from export markets, primarily the UK.

The French Forest Certification Scheme appears to be gathering momentum. Based on ISO 9000 and ISO 14001, the French Forest Certification Scheme was unanimously adopted by the French Forest Certification Association in March 2000. To date, 12 out of the 22 regions have committed to the scheme. It is planned that the scheme will be submitted to the PEFC for assessment and it is anticipated that the first certified wood will be available under the scheme in 2001 (PEFC 2000).

In the marketplace, certification is becoming increasingly important and a number of retailers are now asking suppliers to provide information regarding the source of wood and paper products. One retailer, Carrefour (the world's second largest retailer after Walmart), is encouraging suppliers to supply certified materials. Carrefour prefers FSC certified products, although it will accept products certified according to other certification standards. A number of major retailers have not publicly made a commitment to any certification standard.

Club PROFORETS (the organisation representing WWF's Global Forest and Trade Network in France) has ten members, including Carrefour and Kinnarps (Europe's fifth largest furniture manufacturer). In mid-

1999, Club PROFORETS was under development. In the future, Club PROFORETS will focus on promoting certification amongst French concessionaire holders in Africa and distributors of tropical wood in France (Deletain 2000).

## Italy

Italy has 11,000 hectares of natural forest certified according to the FSC standard. In comparison, there were no FSC certified forests in Italy in mid-1999. The organisation that will represent the WWF's Global Forest and Trade Network in Italy is currently under development.

PEFC is in the early stages of development in Italy. PEFC documentation has been translated into Italian and the process has been initiated to establish a PEFC Board (Gunneberg 2000). FEDER-FORESTE, the national organisation representing woodland owners and forest municipalities, is in the process of becoming a member of PEFC. FEDERFORESTE is also a member of the European Federation of Forest Municipalities and has requested status as an extraordinary member of PEFC (Brun 2000).

It is understood that it is mostly organisations in the northern regions of Italy that are actively taking part in the certification process. A working group has started work on sustainable management criteria for northern Italy using FSC's criteria as its basis.

With regard to ISO14001, the number of certificates issued has increased from 106 (at the end of 1998) to 410 (May 2000). Although ISO14001 has proved popular in Italy, only two of the certificates issued have been to wood products companies.

## Hungary

As of June 2000, no forests had been certified according to the FSC standard in Hungary. Initial discussions have taken place between some Hungarian forestry organisations and the PEFC with a view to establishing a PEFC Board in Hungary (Gunneberg 2000).

## Poland

Poland has the second largest area of FSC certified forest – after Sweden – in the world. In mid-2000, over 2.7 million hectares were certified according to the FSC standard, equivalent to 30% of Poland's total forest and wooded land area. The area

certified has increased by around 0.5 million hectares when compared to figures for mid-1999. Six out of the existing seventeen Regional Divisions of State Forests have achieved FSC certification.

Preparatory work has started in an effort to develop PEFC in Poland and the State Forest Service has confirmed its interest in establishing a PEFC governing body and becoming a member of the PEFC Council (Gunneberg 2000). It is planned that a national certification scheme will be developed and this may be endorsed by PEFC.

With regard to the market, demand for certified products in Poland appears weak (Ratajczak 2000). However, certified wood products are being exported to markets where demand is stronger, including the UK.

## Baltics

Forest policies in Estonia, Latvia and Lithuania are being updated and the privatisation of forestland is under progress. In Estonia and Latvia the State owns about half of the forestland but in Lithuania the State owns a larger proportion, approximately 80 %. In each of the countries, financial challenges make it difficult to effectively implement forest policy or develop certification schemes. Lack of information adds to these challenges (Lintunen 2000).

Each country emphasises that the Standards of SFM under development are planned to comply with both the FSC and PEFC schemes. FSC is stronger in Estonia and PEFC in Latvia. It seems that at least in Estonia there will be competition between FSC and PEFC. PEFC and its member countries have helped arrange seminars to assist in developing the systems of SFM and forest certification. An example of this kind of assistance was the PEFC seminar on certification of SFM, which was held in Riga (capital of Latvia) on the 29<sup>th</sup> and 30<sup>th</sup> of May 2000. This seminar was designed to address questions concerning SFM, forest certification and also the PEFC process.

## Estonia

Work to develop the Estonian National Sustainable Forestry Standard started in 1998. Since then, a National Forest Certification Working Group has been established to develop a national certification standard.

Development of the FSC Scheme has been most prominent. A proposal to take FSC Principles and Criteria as the basis for the Estonian National Standard has been discussed. Formal connections to FSC have



also been developed. At the same time, the development of PEFC is being monitored (Oja 2000).

Plans for the year 2000 include institutionalising the relationship with FSC. This means an official Estonian FSC contact person, and FSC endorsed National Working Group, will be established. Plans have also been made to develop and test the SFM standards. After the testing period, an application could be sent to FSC for endorsement.

## Latvia

The necessary infrastructure for forest certification in Latvia is under development. The main actors behind the forest certification initiative are the Association of Forest Management and the Latvian Forest Owners Association, which were only recently founded. The Council of PEFC Latvia was formed at the end of 1999 (Zakis 2000).

PEFC Latvia has been active in the development of the PEFC certification scheme for Latvia and providing information and training to all those involved in the certification process. A program of education and training on SFM issues and environmental protection issues is currently being undertaken for those involved in certification including forest owners, chain of custody members and the leaders of forest owner certification groups (PEFC 2000).

## Lithuania

The State forest authorities and one particleboard producer have, since the beginning of this year, pushed for certification. As a first stage, a decision has been made to pursue FSC certification for 70,000 hectares of State forest. SGS Forestry has completed a pre-assessment and a report was expected by the end of July. There is potential for successful certification of the area by the end of 2000 (Lebedys 2000).

The Association of Private Forest Owners has been active in developing a PEFC process (Lebedys 2000).

## Chapter 4 – PROGRESS IN RUSSIA

Although certification is in its early stages of development in Russia, a number of significant developments have taken place over recent months. In April 2000, the first FSC certificate was issued for a 32,800 hectare area (annual allowable cut approximately 44,000 m<sup>3</sup>) in the Altai region. Further

certification assessments are planned and one FSC accredited certifier recently completed an assessment of the 800,000 hectare Pechorolych Model Forest in the Komi Republic (Tickell and WWF 2000).

In April 2000, the first meeting of the Association of Environmentally Responsible Timber Producers of Russia was held. Organised by WWF, the Association includes several large Russian producers (the annual average production of members is 600,000 m<sup>3</sup>) and is part of WWF's Global Forest and Trade Network. The Russian Association aims to connect its members with Western companies committed to buying certified products. Association members include Volga (one of Russia's largest paper mills) as well as producers of sawnwood, pulpwood and plywood.

A National FSC Working Group and four regional Working Groups (in Karelia, Khabarovskiy Kray, Komi Republic and Krasnoyarskiy Kray) have been established. To date, the FSC has approved regional criteria and indicators of SFM, at the forest management unit level, in the Central and Southern parts of Khabarovskiy Kray (WWF 2000). The first regional standards are likely to be endorsed by FSC in Khabarovskiy and Komi at the end of 2000 (Ptichnikov and Voropaev 2000).

WWF is currently focusing its certification efforts on North Eastern and Far Eastern Russia (Tickell and WWF 2000). These regions are key producers and exporters of wood products, supplying Western Europe as well as Japan and China. WWF is using Certification Centres to stimulate development in these regions. Certification Centres aim to promote certification through raising awareness, providing information and supporting companies interested in pursuing certification. Centres have been established in Novgorod and Khabarovsk with additional centres planned to open in 2000 and 2001.

PEFC has received some support in Russia. The Ministry of the Economy of the Russian Federation, which is responsible for supervising the Russian timber industry, supports voluntary certification, including PEFC and FSC (Ptichnikov and Voropaev 2000).

There are a number of barriers affecting the development of certification in Russia, including a lack of information and the lack of an economic incentive. While this is the case, WWF and other organisations are focusing their efforts on Russia and we are likely to see a significant increase in certification activity in Russia.

## **Chapter 5 – PROGRESS IN NORTH AMERICA**

Environmental groups in North America have recently seen significant success in steering companies away from old growth wood and toward certification. In August of 1999, The Home Depot announced that it would stop selling wood products from environmentally sensitive areas and give preference to certified wood. In its announcement the company challenged its competitors to follow its lead. Several major competitors have done so. The Home Depot supports FSC as the only system that meets its requirements, but is also pressuring FSC to take a leadership role in developing collaboration among systems (Apple 2000). Other large DIY retailers in North America have not aligned so closely with FSC, rather declaring that they will look for products that have been certified as well managed by a credible, independent third party.

Building on the success in the DIY retail sector, Rainforest Action Network (RAN) next targeted the homebuilding industry. April 1, 2000 was to be a day of action against Centex Corporation and Kaufman & Broad Home Corporation, the first and second largest single-family homebuilders in the U.S. Both companies declared new purchasing policies prior to the April 1 deadline, thus avoiding any public actions from RAN.

The actions of these major forest products consuming companies have given certification a higher profile in North America and suppliers are assessing what if any certification they may need in order to maintain their customer base.

### **United States**

The American Tree Farm System was recently restructured. The system covers some 36 million hectares and has been in operation since the early 1940s. The Sustainable Forestry Initiative from the American Forest & Paper Association and the American Tree Farm System recently announced mutual recognition between the two systems. Lands certified through the American Tree Farm System represent a significant source of supply to many AF&PA companies.

Significant areas of FSC certified forestland have been added in New York and Maine. FSC regional standards development is progressing under a slightly modified structure. The FSC has nine active regional working groups in the U.S. Two of the groups were nearing approval of their standard by FSC

International. However, FSC U.S. made the decision to withhold approval of those standards until an extensive process of harmonisation among the U.S. regions could be conducted. Accordingly, a Technical Standards Committee has been formed. The Committee is developing guide indicators and review parameters to use in the harmonisation of the various regional standards (Brown 2000).

### **American Forest & Paper Association's Sustainable Forestry Initiative (SFI)**

The SFI recently celebrated its fifth anniversary. A new SFI standard was introduced in early 2000. It includes five principles, eleven objectives, and 37 performance measures. The membership of AF&PA controls approximately 90 % of the industrial forestland in the U.S., or just over 23 million hectares. In addition, licensees such as state and county management agencies amount to approximately 1.3 million hectares.

As reported in the last year's Discussion Paper, SFI has developed a third-party verification option for the system. As of the end of 1999, approximately 8 million hectares had been either committed to or completed the verification process. Many of the major corporate members have chosen to undergo verification.

According to the 2000 Annual Report, SFI will begin to move the program to Canada, Central and South America, and even other areas of the world. The Report states that there is a need to work with the other certification systems to “. . . create a system of mutual recognition between international sustainable forestry certification programs” and that “. . . we must ensure that there is consistency and mutual recognition between different standards”. The report also lists the following future tasks:

1. “Further expand the practice of sustainable forestry to encompass even more forest acreage by both attracting new SFI program licensees and expanding AF&PA membership;
2. Establish consistent application of independent third party certification for SFI program compliance among our member companies;
3. Establish a consistent, credible system for international mutual recognition of sustainable forestry certification programs;

4. Increase public awareness of the importance of sustainable forestry certification, with both consumers and forest products industry customers;
5. Establish consistent procedures at the local level to address the reporting and review of inconsistent practices and SFI program violations” (AF&PA 2000).

Work is ongoing to develop a product label and to move towards a form of external governance. A new SFI multi-stakeholder board will meet for the first time in July and is expected to be fully staffed by the end of 2000. Representation on the board will be 60% members outside the industry such as conservation groups and 40% industry representatives. The board will eventually control management of the SFI standard, the verification process, and issues of non-compliance or inconsistent practices. Considerable consumer and legal research is currently being done regarding product labelling. The goal is to determine if labelling is currently possible and what if any provision of the SFI program may have to change in order to allow use of a label (Cantrell 2000).

## Canada

As predicted in last year’s Discussion Paper, significant certification developments have taken place in Canada.

TABLE 1  
Certification status in Canada, May 2000

Standard	Area Covered	
	May 1999	May 2000
CSA	230000	480000
FSC	Not available	212,189*
ISO14001	2550000	15960000
<b>Total</b>	<b>2780000</b>	<b>16652189</b>

Source: CSA 2000 and FSC 2000. \* includes 190,000 hectares later withdrawn.

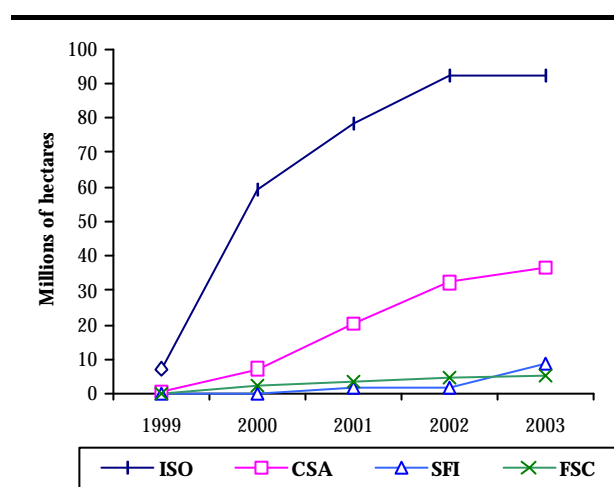
The majority of certification work has been carried out according to ISO1400. In May 2000, ISO14001 certificates had been issued to operations responsible for the management of almost 16 million hectares of forest, more than a six-fold increase when compared to May 1999. Additional ISO14001 certificates will be issued by the end of 2000. Amongst others, Weldwood of Canada is working towards

having woodlands ISO14001 certified by the end of 2000 (CSA 2000).

With regard to the Canadian Standards Association (CSA). Sustainable Forest Management System, the area certified has more than doubled since May 1999. In May 2000, 480,000 hectares had been certified. This area is likely to increase with some of Canada’s largest forestry and wood products companies – including Canfor, Interfor and Weyerhaeuser – aiming to achieve CSA certification. Weyerhaeuser plans to have all its Canadian divisions CSA certified by 2003 (Graph 4) (CSA 2000).

GRAPH 4

Potential certified forestland in Canada, 1999-2003



Source: Canadian Sustainable Forestry Certification Coalition, 2000.

Despite its significant forest area, Canada is a minor player in the FSC system. Controversy around the Maritime Region standards development resulted in J.D. Irving, Limited withdrawing its certification in New Brunswick (190,000 hectares). The Maritime Standard has been endorsed by FSC International and the standards for British Columbia and Great Lakes St.Lawrence (Ontario) regions are in draft form.

With regard to the future, a survey has been completed by the Canadian Sustainable Forestry Certification Coalition to assess the certification intentions of Canadian companies. Companies responding to the survey are responsible for managing approximately 75% of Canada’s productive forestland. According to company’s responses, ISO14001 will remain the dominant certification scheme used by forestry companies, followed by the CSA standard, the SFI and then the FSC standard. What the figure tends to hide is a tendency for Canadian companies to pursue multiple certifications.

Companies often begin with ISO and then move to CSA and finally FSC (Searle 2000).



## Chapter 6 – STATUS OF THE MARKETPLACE

As discussed above, the commitments of major industry customers in North America have taken the interest in certification to a new level in that region. The demand from retailers is clearly making its way back to producers of primary and secondary producers. Still, it is difficult to quantify demand for certified products. The system that is clearly demanded in the marketplace is FSC. In Europe, PEFC has been successful in gaining support from producers, yet little or no market reaction can be seen.

Despite the increase of interest in the marketplace, current research still shows a lack of awareness of environmental issues and certification. For example, Seppälä (2000) found that sawmills on the West Coast of North America saw little environmental awareness in their most important customers. Still, respondents in the study did see good forest management as a source of competitive advantage.

Rametsteiner (2000) provides three scenarios (High, Medium and Low) regarding the development of the market share of certified industrial roundwood in Europe. He carefully cautions against their use as forecasts. Still, they provide a basis through which to contemplate the development of the marketplace for certified products. The scenarios carry a variety of assumptions that cannot be covered here, but Table 2 outlines the potential development for each scenario (FSC and PEFC certification combined).

### The Global Forest and Trade Network

What was once termed buyers' groups has now taken a new name, The Global Forest and Trade Network. WWF has continued to work to develop this method of not only creating demand, but now also to increase production. For example, a Producers Group has been formed in Russia and others are planned. Table 3 provides an overview of network members in the ECE region. WWF estimates that by the end of 2001 there will be 1000 Network members around the world.

TABLE 2

Market share (%) scenario of certified industrial roundwood in Europe, 1999-2005

Year	Market Share		Market Share
	High Scenario	Medium Scenario	Low Scenarios
1999	2.8	2.8	2.8
2000	11.0	7.0	6.7
2001	27.3	14.5	13.8
2002	38.1	24.1	19.7
2003	43.6	29.4	21.9
2004	44.8	32.5	23.5
2005	46.7	35.2	25.3

Source: Rametsteiner, E. 2000.

The network has increased significantly over the past year, with new groups being established in Brazil, Russia, and Ireland. Overall, membership within existing groups also increased. For example, membership of the UK Group increased by 11 as compared to the number reported in the last Discussion Paper.

### The Internet

Similar to other markets, the market for certified wood products is being affected by the development of the internet. Suppliers, buyers and providers of certification services are now able to provide information, develop business relationships and trade online.

The Certified Forest Products Council currently provides an online service that enables potential buyers to search for suppliers of certified wood products. Later in 2000, it is planned that ForestWorld.com will offer online trading in certified wood products in an exclusive deal with the Certified Forest Products Council. This will enable buyers and sellers of certified wood products to trade electronically. With more than twenty sites currently trading in wood products online, ForestWorld.com see this as a way of differentiating themselves from their competitors. On a relatively small scale, other online traders are currently successfully supplying customers with certified wood products via the internet.

TABLE 3  
The global forest and trade network

Country	Group Name	Founded	Number of Members
Austria	WWF Gruppe 98	1996	25
Belgium	Club 97	1994	41
Germany	Gruppe 98	1997	58
Switzerland	WWF Woodgroup	1997	20
Netherlands	Stichting Goed Hout!	1995	41
Finland, Sweden, Denmark, Norway	WWF Skog 2000	1998	33
Spain	WWF Grupo 2000	1998	13
UK	WWF 95+ Group	1991	102
North America	Certified Forest Products Council	1997	239
France	Club PROFORETS	1999	9
Russia	Association of Responsible Producers of Russia	2000	6
Brazil	Compradores de Madeira Certificada	2000	38
Australia	WWF's Oceania Buyers' Group	1997	4
Ireland	Just Forests	2000	6

*Source: The Global Forest and Trade Network Fact Sheet, 2000. WWF Forests for Life, Global Forest and Trade Initiative. Surrey, United Kingdom.*

### Concentration of 95+ Group and 2000 commitment

The 95+ Group has had an undeniable impact on the development of and demand for certification. Given this impact, it is important to watch how the Group evolves over time. According to WWF, the Group is now made up of 94 companies and 11 local authorities. These companies make up nearly \$77 billion in total sales and \$6 billion in wood products sales. One of the reasons the Group has had such a significant impact on certification is that as a whole, the Group accesses wood products from 80 different countries, 28 of which are now supplying certified wood. The Group has a long-term goal of 75% of trade in the UK to be certified by the year 2005. Accordingly, membership will be expanded into other sectors such as specifiers, construction, small businesses, producers, forest managers, and supporters.

The year 2000 was a significant milestone for many of the early members of the 95+ Group. Generally the goal was to be selling 100% certified products by the end of 1999. Currently, as a whole, approximately 9% of Group trade is certified.

The efforts and evolution of one of the key Group members, B&Q plc, is insightful. B&Q was possibly the most aggressive company in attempting to meet the 100% certified by 2000 deadline. However, when it became clear that the company could not meet the deadline, it chose to accept product from the Finnish Forest Certification System as Finland represented a large proportion of its supply. By the end of 1999, over 80% of the company's products reportedly met the requirements necessary to carry the FSC label. Nearly all of the remaining came from the FFCS with less than 1% not being certified (Knight 2000). Despite the apparent success, B&Q is currently revising its timber buying policy. One major issue is the ability to access sufficient volumes of FSC certified product. As stated in the proposed Policy,

"FSC's growth, whilst impressive, is not compatible with even the growth of B&Q let alone the growing demands of certified timber from around the world".

"We encourage non-FSC schemes to find ways of winning support from environmental groups and the FSC themselves continue to explore ways of recognizing other schemes and, in the meantime, will develop a method of evaluating different certification schemes. We will use FSC as the best available benchmark" (Knight 2000).

A key issue for B&Q is the ability to maintain one product label. The company would like to see a global

umbrella scheme that owns and awards a label and sees FSC as the most logical candidate. Despite the drawbacks of PEFC (lack of clear forestry standard and poor chain of custody) as seen by B&Q, it states, “. . . therefore that FSC and Pan European [PEFC] should consider mutual recognition or even merger”. Finally, the company states, “It is a political problem alone that is preventing the adoption of a single label, not a forestry or commercial problem”.

It is difficult to predict how the actions of B&Q may impact the 95+ Group. While it is clear the company is taking a position for the various certification schemes to work together, it still strongly supports FSC and recognises it as the standard with which to compare all other schemes. The company's actions are simply a reflection of the current state of the marketplace. For those companies seeking FSC certified wood products, there is often insufficient supply.

## **Chapter 7 – THOUGHTS FOR THE FUTURE**

Major retailers are increasing pressure on the various certification schemes to work together in order to find a common thread and the ability to supply sufficient volumes of product to the marketplace with a single label. We will continue to see efforts in this direction.

### **Mutual recognition and evolution of systems**

Mutual recognition has become a common term in certification circles. Each certification meeting further explores the potential for mutual recognition. For example, it was a significant topic at the WWF/World Bank meeting in November of 1999 and the WWF Forests for Life Conference in June 2000. The PEFC co-ordinated a special seminar especially on the topic in late June of 2000 in Brussels. A wide range of systems was represented at the meeting, including FSC. A report on the seminar is currently being prepared.

Mutual recognition and evolution are logical outcomes to the development of certification. Because of the politics currently involved, success largely hinges on the ability of various systems to maintain credibility in the eyes of key stakeholders. For example, if FSC and PEFC were to consider mutual recognition, FSC would risk losing the support of ENGOs. Still, it appears that these two systems may be headed for competition not only in the marketplace, but for leadership in the process of mutual recognition!

As market demand becomes more refined, systems will be forced to evolve to meet that demand. Examples include the new percentage-based claims policy of FSC and the development of a multi-stakeholder board for SFI. As these changes take place, the systems will become increasingly similar over time. At some point they become so similar that there is little to differentiate one from another. Currently, there are many strong opinions, vested interests, and simple politics that prohibit mutual recognition from moving forward quickly. In the short term, many believe it is "pie in the sky" to talk about mutual recognition amongst the key international certification initiatives.

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## SOME FACTS ABOUT THE TIMBER COMMITTEE

The Timber Committee is a principal subsidiary body of the ECE (UN Economic Commission for Europe) based in Geneva. It constitutes a forum for co-operation and consultation between member countries on forestry, forest industry and forest product matters. All countries of Europe; the former USSR; United States of America, Canada and Israel are members of the ECE and participate in its work.

The ECE Timber Committee shall, within the context of sustainable development, provide member countries with the information and services needed for policy- and decision-making regarding their forest and forest industry sector ("the sector"), including the trade and use of forest products and, when appropriate, formulate recommendations addressed to member Governments and interested organisations. To this end, it shall:

1. With the active participation of member countries, undertake short-, medium- and long-term analyses of developments in, and having an impact on, the sector, including those offering possibilities for the facilitation of international trade and for enhancing the protection of the environment;
2. In support of these analyses, collect, store and disseminate statistics relating to the sector, and carry out activities to improve their quality and comparability;
3. Provide the framework for co-operation e.g. by organising seminars, workshops and ad hoc meetings and setting up time-limited ad hoc groups, for the exchange of economic, environmental and technical information between governments and other institutions of member countries that is needed for the development and implementation of policies leading to the sustainable development of the sector and to the protection of the environment in their respective countries;
4. Carry out tasks identified by the UN/ECE or the Timber Committee as being of priority, including the facilitation of subregional co-operation and activities in support of the economies in transition of central and eastern Europe and of the countries of the region that are developing from an economic point of view;
5. It should also keep under review its structure and priorities and cooperation with other international and intergovernmental organisations active in the sector, and in particular with the FAO (Food and Agriculture Organisation of the United Nations) and its European Forestry Commission and with the ILO (International Labour Organisation), in order to ensure complementarity and to avoid duplication, thereby optimising the use of resources.

More information about the Committee's work may be obtained by writing to:

**Timber Section**

**UN/ECE Trade Division**

**Palais des Nations**

**CH - 1211 Geneva 10, Switzerland**

**Fax: + 41 22 917 0041**

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