




# Survey of Chain-of-custody Certification in the Countries of Central and South Europe

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# Objectives of the paper

- Present selected results of multinational study
  - Analyse the present status of COC certification in the region
  - Examine understanding of certification concept (SFM and COC)
  - Examine understanding of objectives and purpose of COC certification
  - Identify expectations and motivation for participating in CFPM
  - Define original incentives for certification
  - Highlight differences between countries
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# Forest certification

- Over 20 years operating tool to ensure SFM using an independent certification
- Incorporates SFM and COC certification to deliver sustainably sourced forest products to the markets
- Certification widely accepted in emerging issues such as governmental procurement policies, ecolabels awarding, social corporate policies, green building initiatives and prove of the legality of timber origin
- Space for diversification and new approaches to certification (e.g. sustainable biomass, GHG calculations)
- Globally by Dec 2015 - 458.4 mil. ha certified, with FSC over 186 mil. ha and PEFC 272 mil. ha estimated over (7.5 million hectares double certification estimated)
- COC certificates - FSC 29,801 and PEFC 10,744 chain of custody certificates



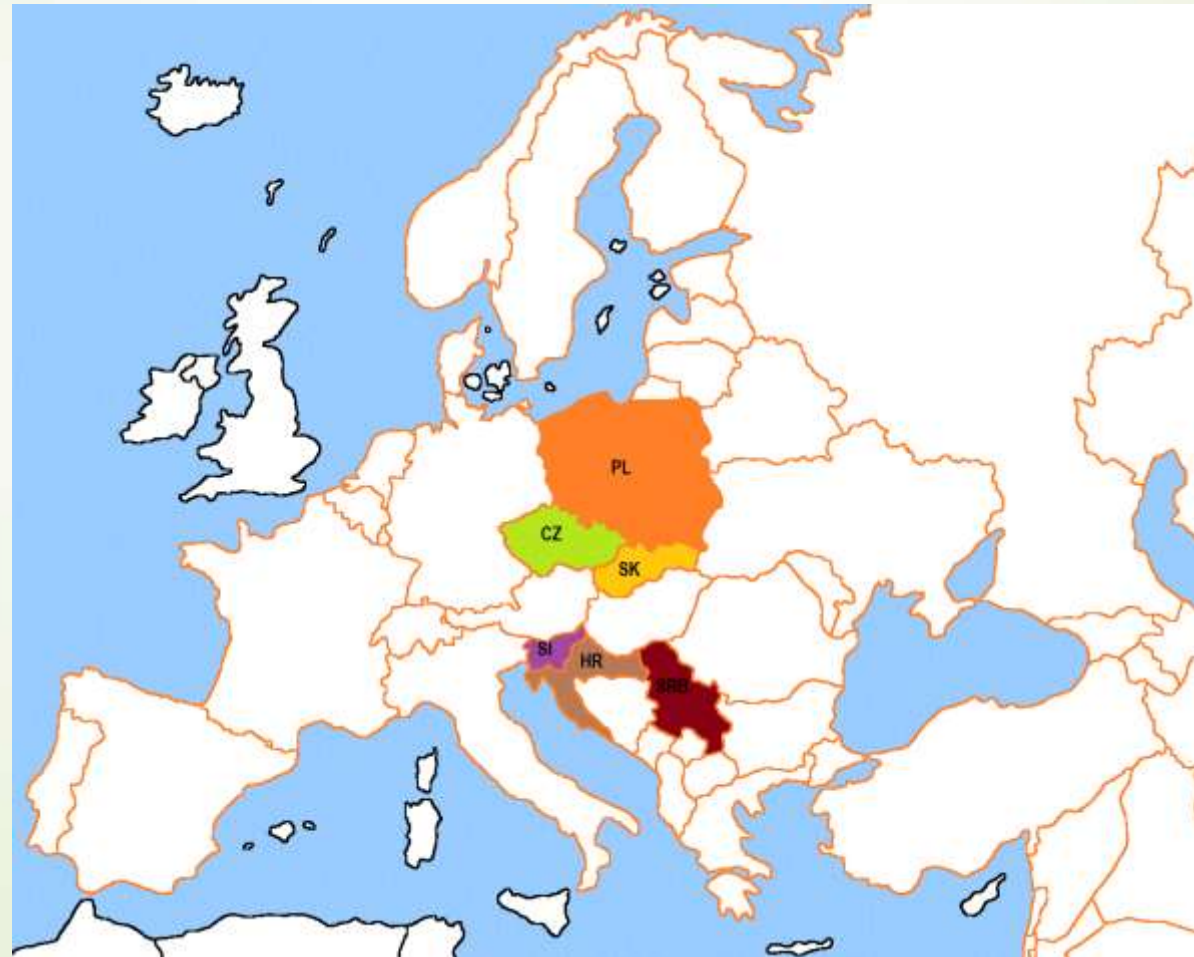
# Methodology



- Online questionnaire survey carried in Poland, Slovakia, Czech Republic, Slovenia, Croatian and Serbia in Oct and Nov 2015
- Survey implementation included pre-notification email, first and second mailing
- Database of PEFC and FSC certified entities used
- 1916 companies contacted, 744 complete responses received (38.83%)
- Questionnaire structure – (i) business profile of companies, (ii) understanding the forest certification concept, (iii) internal information on involvement in the certification process, and (iv) marketing and sales of certified wood products
- Frequency analysis, Pearson's Chi-square

# Geographical scope of research

- 6 Central and South European countries

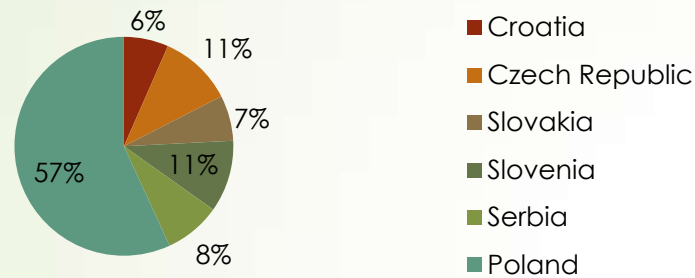


# Present status of forest certification

- ▶ Significant role of public forests in the initialisation of process of forest certification and stakeholders participation
- ▶ Croatian and Serbian forest owners use only FSC certification scheme (2.04 mil. ha and 1.00 mil. ha, respectively)
- ▶ Rest of countries utilise both the FSC and PEFC programmes.
- ▶ Slovak and Czech Republic dominated by PEFC certified areas (1.25 mil ha and 1.77 mil. ha, respectively)
- ▶ In Poland, with its area of almost 7 mil. ha of certified forests, more than 95% of the area double certified
- ▶ PEFC recognised national systems in Poland, Czech Republic, Slovenia, and Slovakia
- ▶ FSC national standards developed in Poland, Serbia and Czech Republic.
- ▶ FSC COC certificate holders dominated in all countries (over 2300 FSC COC vs. 540 PEFC COC certificates)
- ▶ FSC Control Wood program implemented more frequently in the countries with the availability of PEFC certified wood

# Demographic data

## Respondents by countries



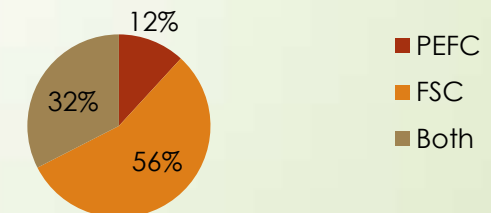
## Respondents by company size



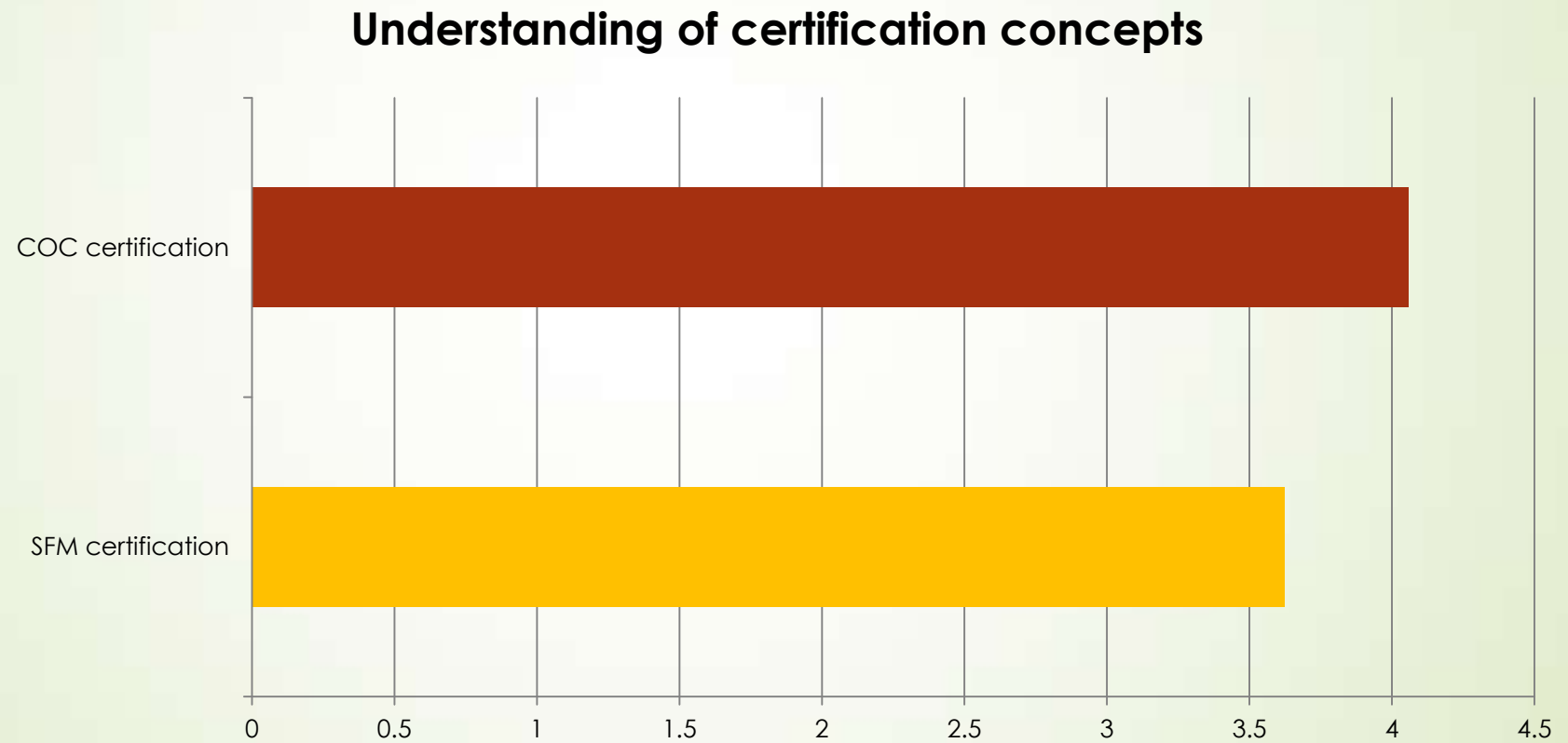
## Respondents by type of operation



## Respondents by certification scheme



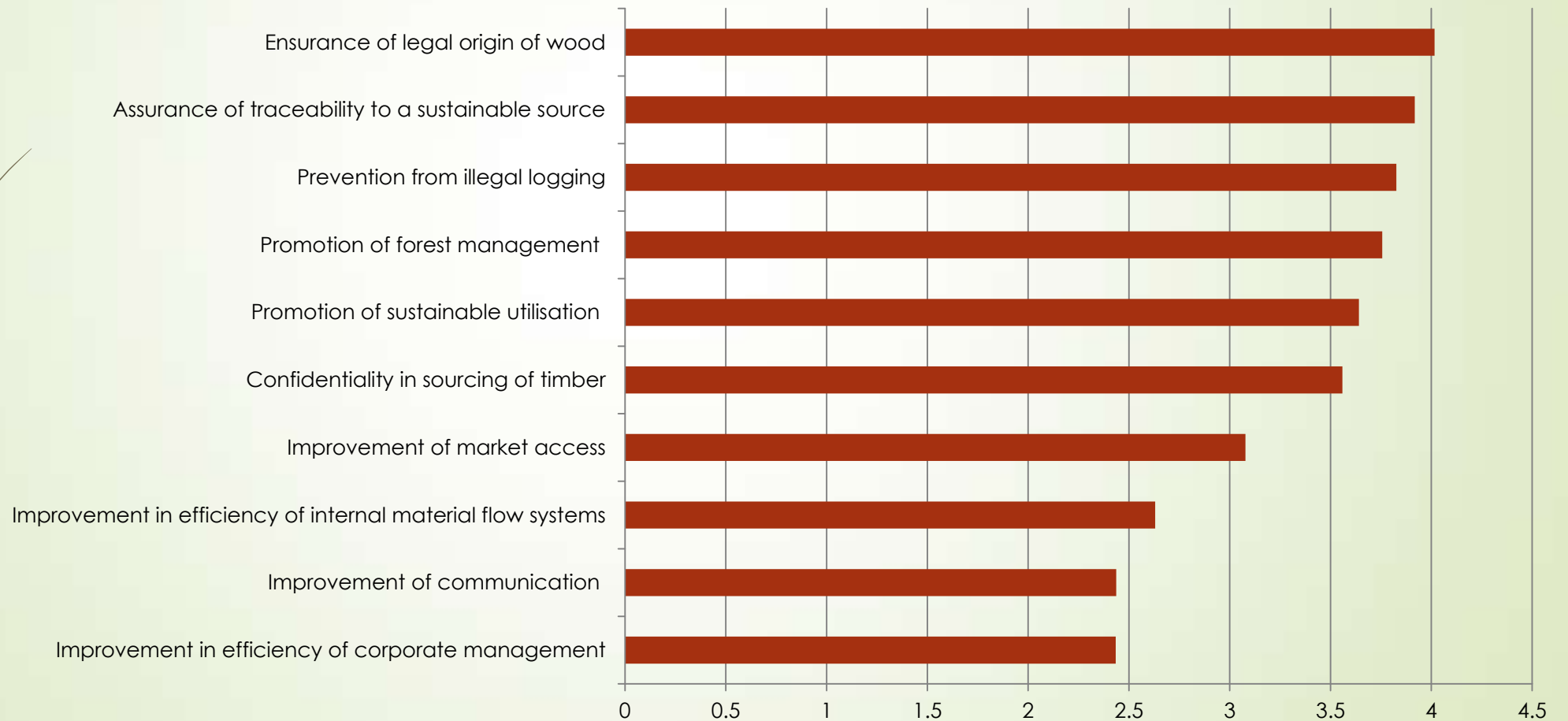
# Understanding of certification concept





# Attitudes towards objectives and purpose of COC certification

## Agreement with certification statements



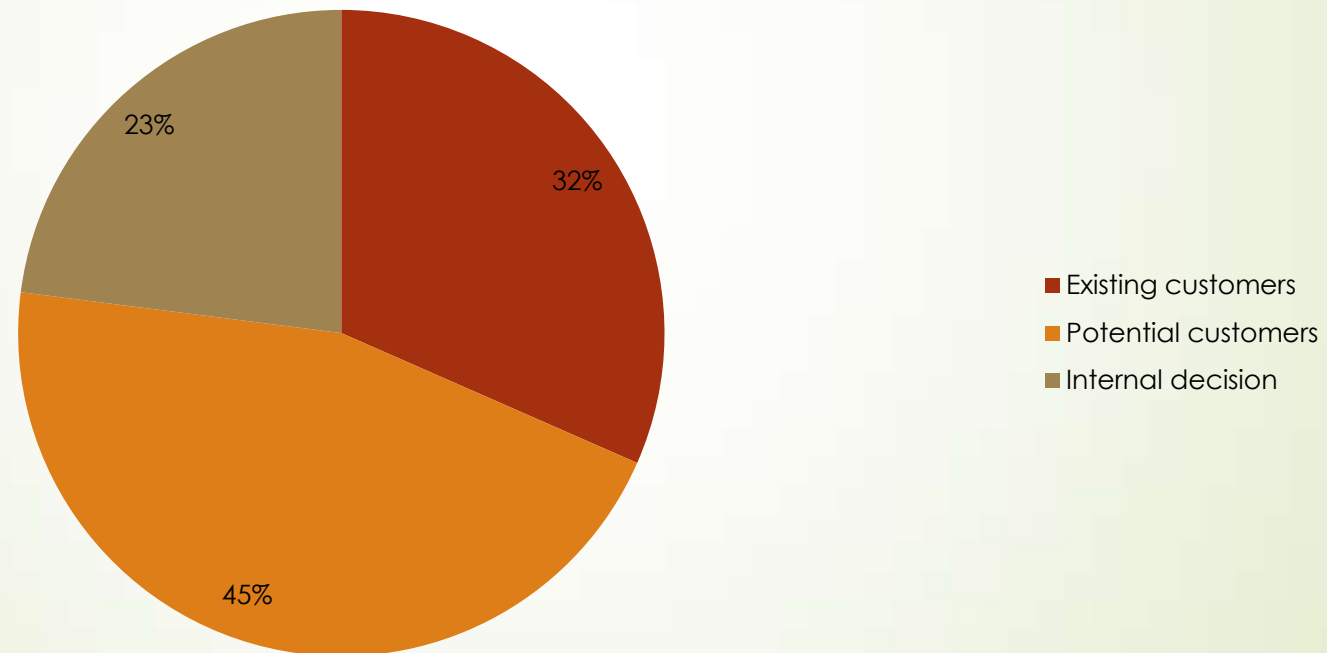
# Expectations motivating companies to enter CFPM

## Why company entered CFPM



# Original incentives for certification

Incentives to enter CFPM





# Conclusions

- ▶ There are country by country differences in proportion of certified area, certification scheme adopted and structure and number of COC certificates
- ▶ Understanding of SFM and COC certification concept is at high level
- ▶ Certification is perceived mainly as a tool to prove legality of timber rather than sustainability
- ▶ Main expected benefits following from entering CFPM are linked to the improvement of external image together with expanding market share, finding new customers and consequently increasing profit margin

# Thank you for your attention!

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