



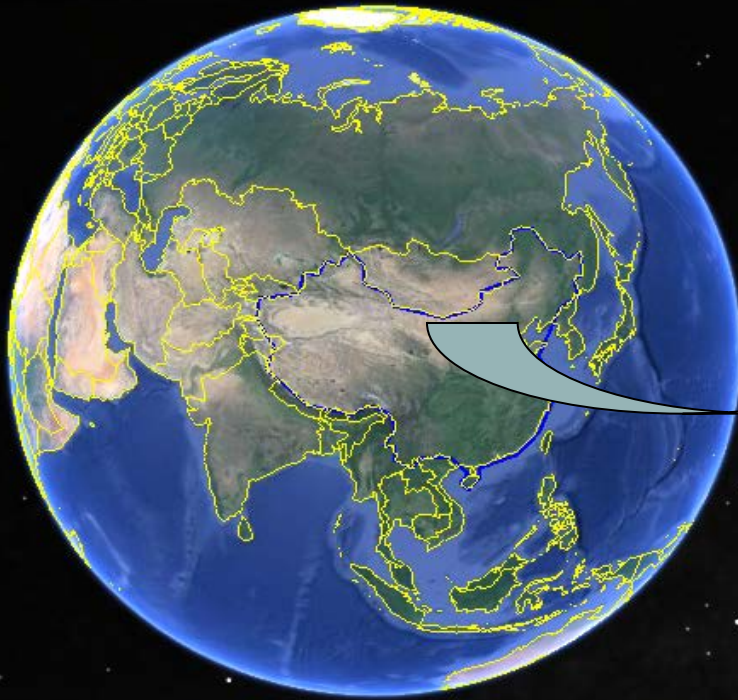
World Forest Institute



Study on New Market Opportunities of US Certified Forest Products in China

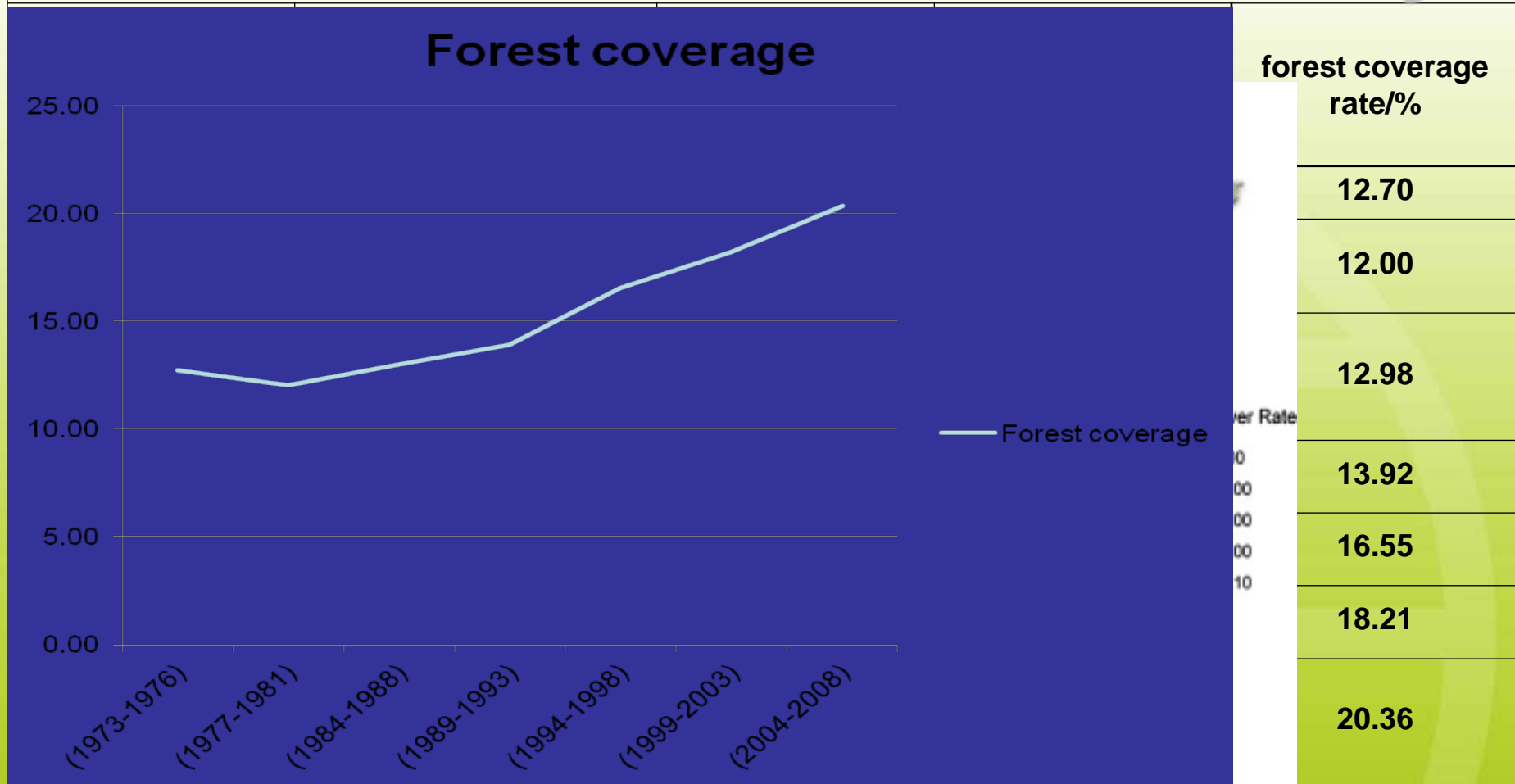
Xiaoqiong-Liang
Chinese Academy of Forestry

1.China



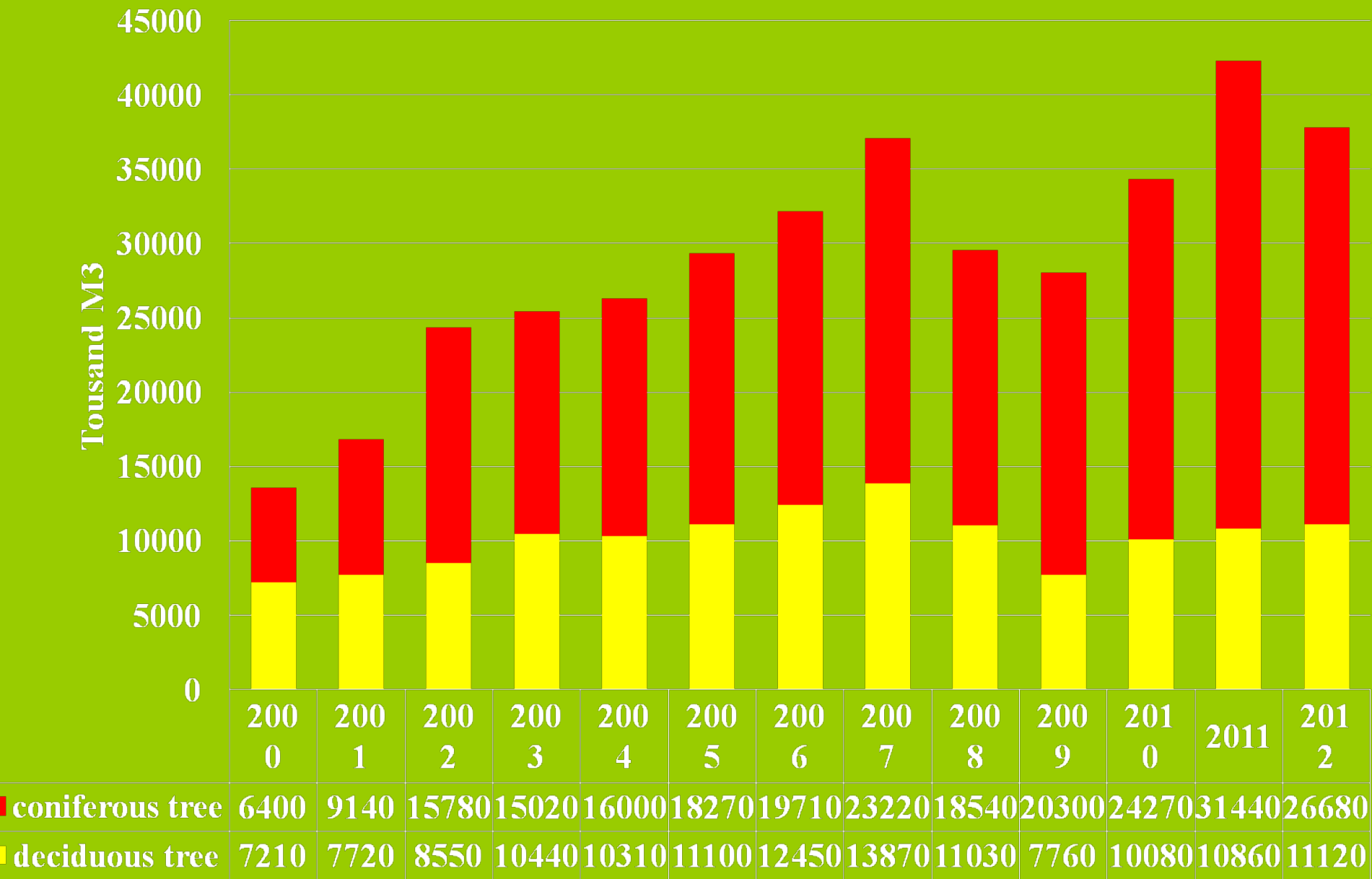
Population: 1.35 billion
Area: 960,000,000ha

National Forest Continues Inventory

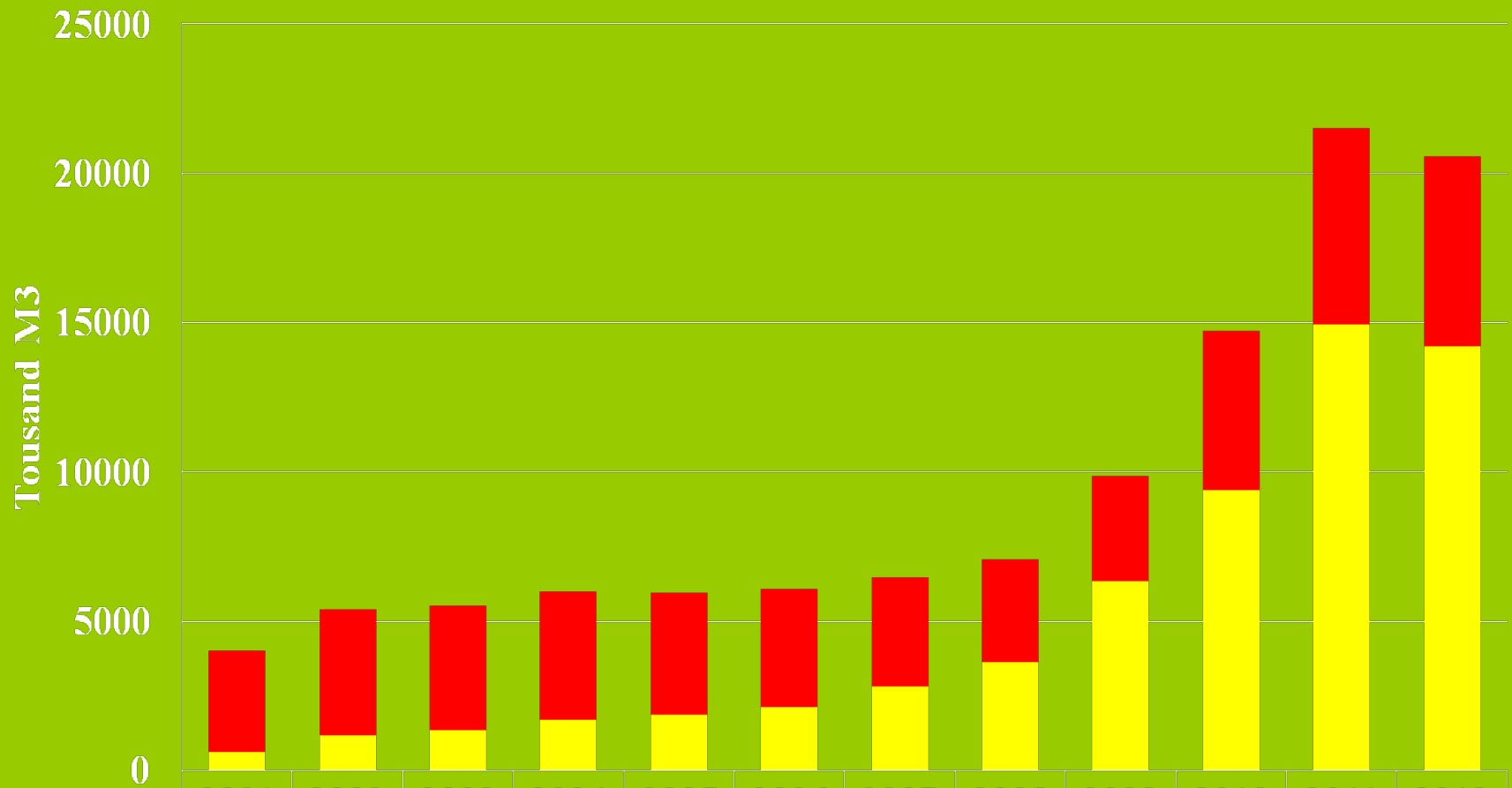


- **Plantation:62 milion ha(2004-2008)**

Global Import of Logs(2000-2012)



Global Import of Sawn Timber(2001-2012)



deciduous tree	3400	4206	4139	4304	4090	3960	3686	3408	3519	5341	6592	6346
coniferous tree	640	1189	1373	1700	1883	2108	2804	3645	6344	9371	14920	14220

Import Country(Thousand M ³)											
Country		2008		2009		2010		2011		2012	
		Quantity	Proportion %	Quantity	Proportion %	Quantity	Proportion %	Quantity	Proportion %	Quantity	Proportion %
Logs	Russia	18665.1	63.12	14811.5	52.79	1403.54	41.86	14070.9	33.24	11182.9	29.51
	New Zealand	1908.6	6.45	4413.5	15.73	5938.2	17.29	8423.3	19.48	8621.4	22.75
	U.S.	397.5	1.34	759.5	2.71	2781.4	8.1	4885.9	11.54	3639.4	9.6
	Canada	206.6	0.7	372	1.33	1178.4	3.43	2461.2	5.81	2440.8	6.44
	Australian	429.5	1.45	732.1	2.61	1056.2	3.08	1576.4	3.72	1221.2	3.22
Total of Import		29570		28059		34347.5		42325.8		37892.7	
Lumber	Russia	1968.3	27.91	3120.5	31.64	4366.9	29.68	6073.3	28.23	6215	30.22
	New Zealand	239.1	3.39	417.8	4.24	412.6	2.8	410.2	1.91	486.4	2.37
	U.S.	1042.5	14.78	929	9.42	1432.3	9.74	2680.2	12.46	2225.6	10.82
	Canada	1133.6	16.07	2437	24.71	4022	27.34	6866.1	31.91	6441.6	31.33
Total of Import		7053		9863		14711.8		21517		20562.7	

Why I am here

- Along with the increasing demand of legality and sustainability of forest products by the international communities, the market demand for certified forest products in China will be increasing rapidly.
- U.S is China's top trade partner in forest products.
- U.S has 2 national forest certification schemes which are SFI and ATFS, and both are endorsed by PEFC.

Project Purpose

- Share China forest certification information
- To understand the current trade status of un-certified and certified forest product between China and U.S
- To analyze the future trade perspectives of un-certified and certified forest products between China and U.S





2.China Forest Certification Scheme and International Schemes in China

Overview of forest certification schemes in the world

- Forest certification started around UNCED in 1992
- The first forest certification scheme was established in 1993

FM certification: to enhance forest management level



COC certification: to ensure sources of certified raw materials



Overview of forest certification schemes



American Tree Farm System
We grow stewardship from the roots.

- Currently, there are 2 categories of forest certification schemes



CSA Group
Groupe CSA



育てよう日本の森
 使おう日本の木

「一般社団法人 緑の循環認証会議」
 Sustainable Green Ecosystem Council



**SUSTAINABLE
 FORESTRY
 INITIATIVE**

SFI-00001

Endorsement of Forest Certification Schemes)

- FSC Scheme (Forest Stewardship Council)

- (2) National Endorsement Schemes



mtcc

Over 30 national schemes, including China

Forest certification in China

- China Forest Certification Council (CFCC) 
- PEFC Scheme 
- FSC Scheme 

- Certification standard
 - Two certification standards both for FM and COC
 - Forest Certification in China --- Plantation Management (nearly finished)
 - Forest Certification in China --- Bamboo Plantation Management (nearly finished)
 - Carbon forest management certification (certification standard is going to be developed)

CFCC

- Also:

- Non-wood forest products certification (certification standard is under development)
- Forest eco-service certification (certification standard is under development)
- Certification for commercially managed precious, rare and endangered species (certification standard is under development)



CFCC progress --- certification



- Only one certification body
 - Some applicants are waiting for approval
- Current progress of certification
 - Issued 10 certificates: 8 for FMUs with 420,000 ha; 2 for COC



certified forest management units



中林天合（北京）森林认证中心
Zhonglin Tianhe (Beijing) Forest Certification Center (ZTFC)

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FSC



- Established in November 1993
- Headquarters: Now in Bonn, Germany
- Mainly initiated by ENGOs, such as WWF and the Greenpeace
- Accredited certification standards and certification bodies by itself
- Certification bodies: 30 accredited

FSC



International standard:

- Before: 10 principles and 56 criteria
- Currently: 10 principles and 70 criteria
- Each country may develop its own national standard, but with FSC requirements and accredited by FSC
- National Initiatives/National Working Groups, now transferring to National Offices

PEFC



- Established in June 1999 in Paris, with headquarters now in Geneva
- Mainly initiated by private forest owners in Europe
- Changed from regional scheme into international scheme in 2003, with the same abbreviation of PEFC
- Consists of PEFC Council and Board of Directors, and national governing bodies are its members
- 36 national members, including China

PEFC

Certification standard:

- Same as Helsinki Process (6 criteria and 27 indicators)
- Each country may develop its own standard but should be endorsed by PEFC)

Certification bodies: Accredited by national accreditation bodies



Development of international schemes in China

- as of July 2013
- FSC
 - 3.13 million ha by 59 FMUs
 - 2,956 COC certificates, excluding 140 from Taiwan and 572 from Hong Kong
- PEFC
 - No forest certified by PEFC due to no endorsement yet
 - 190 COC certificates, excluding 7 from Taiwan

FSC and PEFC relationship with Chinese Government

- FSC :
 - The first forest certification scheme in the world and the first forest certification scheme entering China
 - Now the relationship is complicated due to: (1) that it can not be mutually endorsed; (2) We already have CFCC; (3) Certification body register;

FSC and PEFC relationship with Chinese Government

- PEFC
 - Its China Office was established in 2007
 - Currently, China Forest Certification Scheme is seeking endorsement by PEFC
 - the relationship will reach peak stage once the endorsement is made

Perspective of CFCC

- Government side
 - Help wood companies to access the international market
 - Help to improve forest management level
 - Green-wood products public procurement policy
- ⑩ Enterprise side
 - Need certification for int'l trade
 - China wants own system (more cost-effective than FSC)

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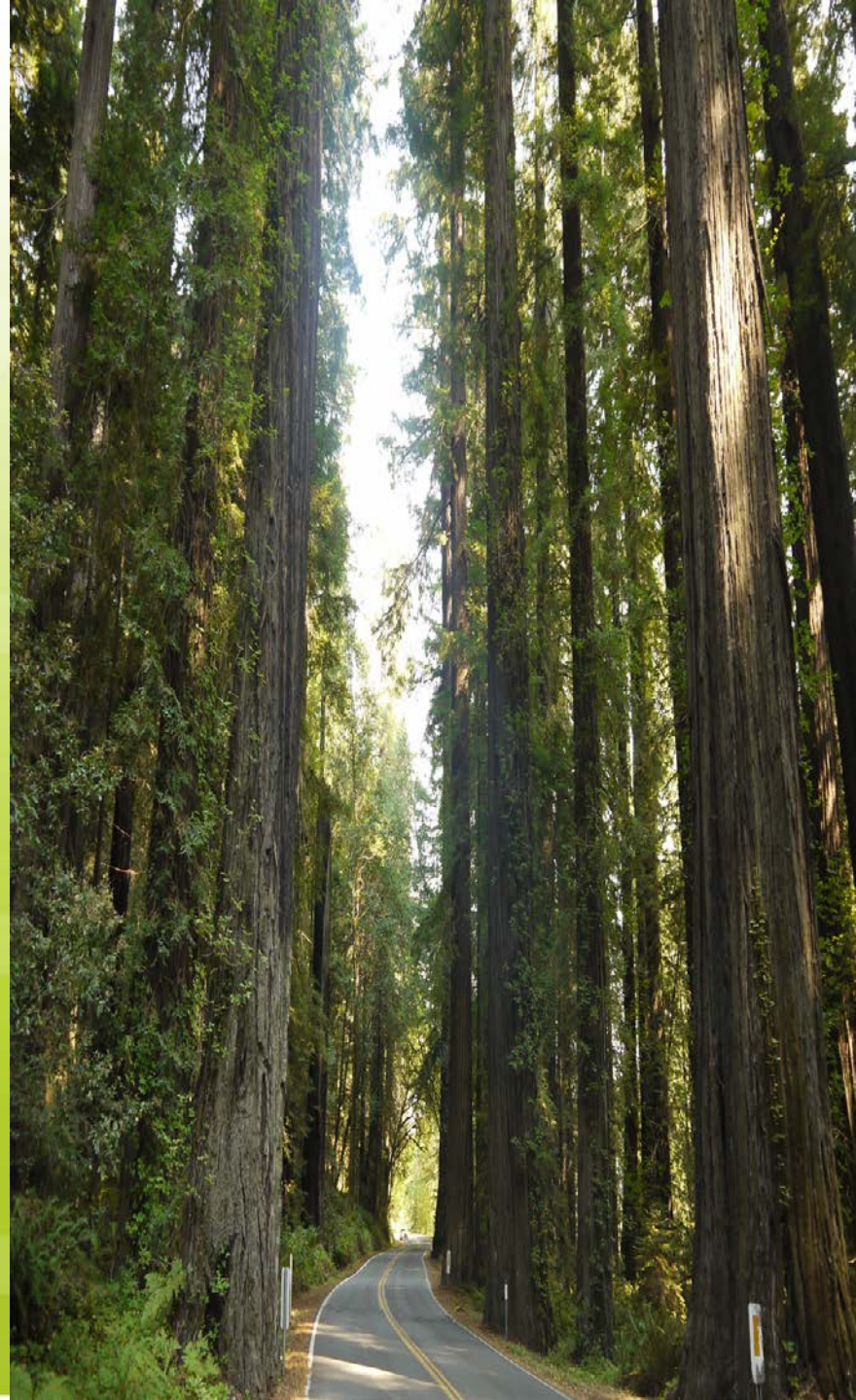
Certified Forests in Oregon and Washington

- FSC --- 7 cases, 72,617 ha
- SFI --- 18 cases, 3,987,531 ha



Questionnaire Survey

- FSC certified company:
 - Sent 7, got 4 reply
- SFI certified company:
 - Sent 15, got 10 reply



- What percentage of your forestlands and your wood product are certified?

FSC: 75% of them have all of their forest land certified by FSC, and all of them want to increase their acreage.

SFI: 90% of them have all of their forest land certified by SFI, 40% want to increase their acreage.

- Do you export to China?

FSC: 100% of them export their logs/
lumber/forest product to China. 30%;

SFI: 50% of them export their logs/lumber/forest
product to China. 25%;

- Do you think that having certification is critical to the success of your business, both domestically and internationally?

FSC: 100%

SFI: 70%

- Are you aware that China has its own forest certification system (Chinese Forest Certification Scheme), which will be endorsed by PEFC-the European certification system?

FSC: 0% know

SFI: 30% know

- Are you aware that FSC does not comply with the Chinese Certification and Accreditation Regulation, and it is likely that in the future the Chinese Government will not accept FSC certified products?

FSC: 0% know

SFI: 10% know

Conclusion

- All of FSC certified respondents sell their logs/lumber to China, and only some of SFI certified respondents sell their log/lumber to China
- The current trend will continue - the market demand for forest products in China will keep increasing
- SFI certified wood - In a short time after CFCC is endorsed by PEFC, the market demand for SFI certified forest products in China will increase rapidly
- FSC certified wood – the market demand for FSC certified wood in China will decrease
- The companies I spoke with did not know much about Chinese Forest Certification situation, we need much more information exchange

Thank you!

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List of companies I spoke with

SFI CERTIFIED COMPANIES:

Forest Investment Associates
Hampton Resources
Hancock Forest Management
Olympic Resource Management
Plum Creek Timber Company
Port Blakely Tree Farms, L.P.
Sierra Pacific Industries
Weyerhaeuser NR Company
Yakama Nation
Starker Forests

FSC CERTIFIED COMPANIES:

Collins Pine Co
GreenWood Tree Farm Fund
Hancock Forest Management
Trout Mountain Forestry