

Sustainable Forestry and Forest Product Promotion: A North American Perspective



World Forest Institute fellowship project
Nathan Trushell



Sustainable Forestry and Forest Product Promotion: A North American Perspective

- **Introduction**
- **A Perspective on Forest Management in Australia**
 - Background
 - Public Perception
 - A challenge
- **North America**
 - Themes
 - Examples
 - Strategies
- **Conclusion and questions**



Who am I?



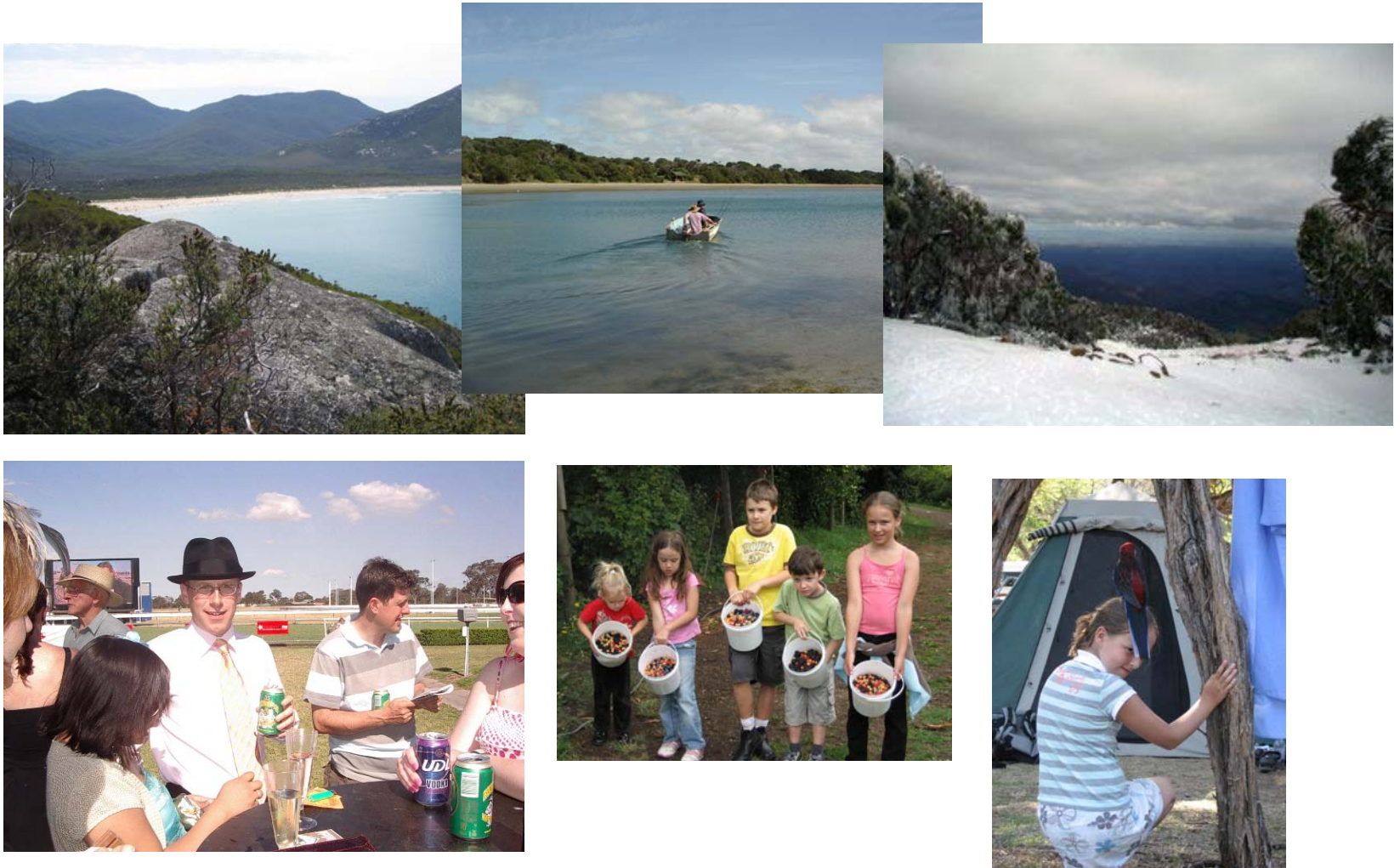
Where I live



Where I live



Local Area



Local Forest Industry



About VicForests



- A Victorian government business established in August 2004.
- We are primarily responsible for the harvest and sale of State forest timber and regeneration following harvest, in eastern Victoria.
- Our central role is to ensure the best possible return on the harvest of State timber resources, harvested sustainably.
- We were created as part of the separation of commercial forestry policy and public land stewardship.

Our Mission

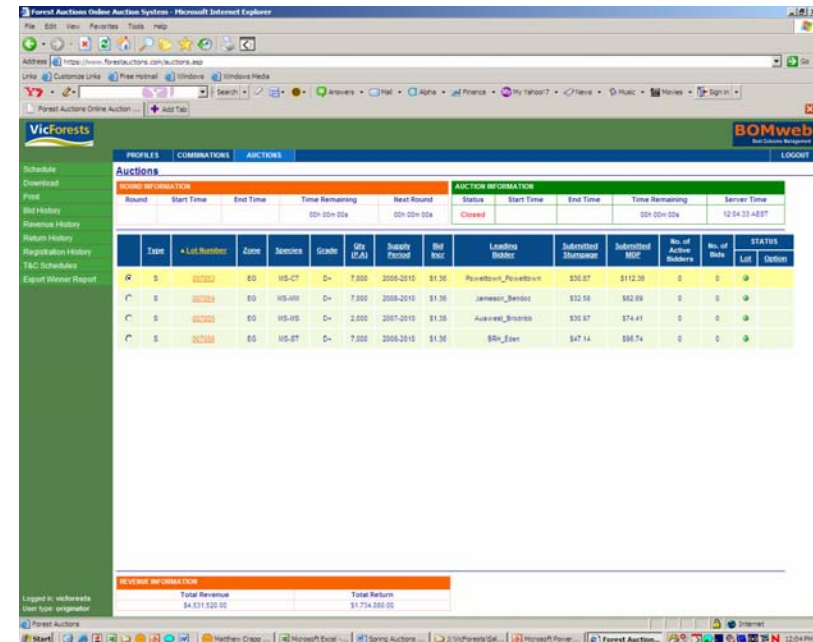
To build a responsible business that generates the best community value from harvesting Victoria's State forests.

Our Vision

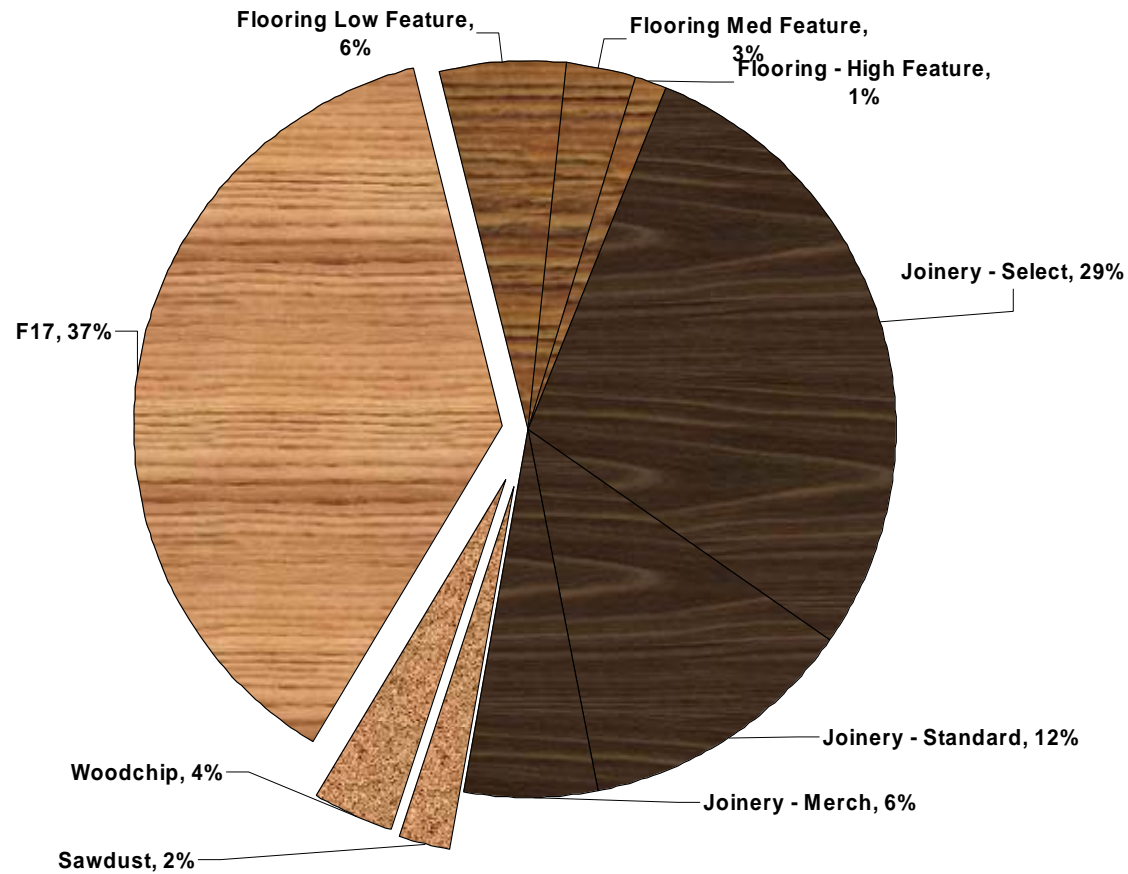
To be a leader in a sustainable Victorian timber industry.

About VicForests

- Largest producers of hardwood sawlog in Australia.
- Electronic on-line timber sales.
- Undertake own harvest and haul.
All sales at the mill gate.
- Highly regulated industry.



More than 50% of Victorian Hardwood Sawn Output is at the High End



Forestry In Australia - Resource

resource base

2 Land areas, by vegetation cover ^a

	NSW	Vic.	Qld	WA	SA	Tas.	NT	ACT	Aust.
	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha	'000 ha
Closed forest	486	18	2 952	169	15	598	406	0	4 644
(% of land area)	0.61	0.08	1.71	0.07	0.02	8.82	0.30	0.00	0.60
Open forest	19 240	19 240	19 240	19 240	19 240	19 240	19 240	96	45 603
(% of land area)	24.41	24.41	24.41	24.41	24.41	24.41	24.41	39.92	5.94
Woodland	2 720	2 720	2 720	2 720	2 720	2 720	2 720	22	102 526
(% of land area)	3.40	3.40	3.40	3.40	3.40	3.40	3.40	9.03	13.35
Plantation ^b	0	0	0	0	0	0	0	10	1 818
(% of land area)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	3.96	0.24
Unknown	3 632	3 632	6 275	3 632	3 632	3 632	3 632		9 907
(% of land area)	4.53	4.53	3.63	4.53	4.53	4.53	4.53		1.29
Total forest									
vegetation cover ^c	27 004	8 330	55 967	25 753	11 038	3 417	32 862	127	164 498
(% of land area)	33.69	36.60	32.40	10.20	11.22	50.40	24.41	52.91	21.41
Total land area	80 160	22 760	172 720	252 550	98 400	6 780	134 620	240	768 230

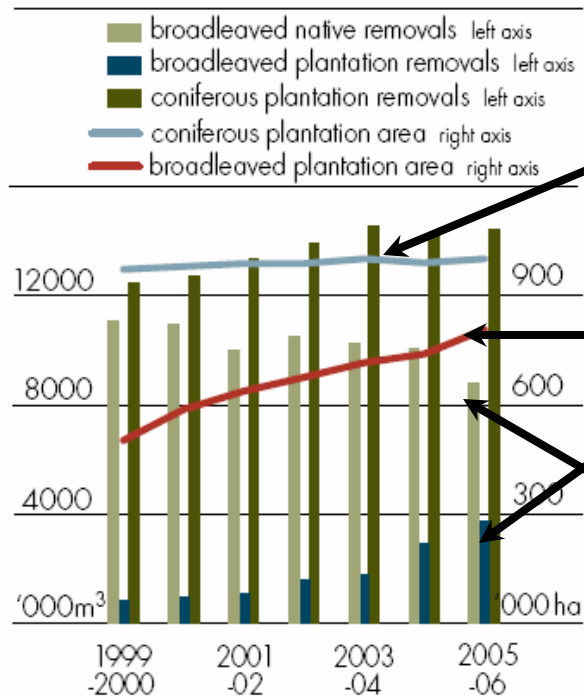
Australia 164 million hectares
 United States 304 million hectares
 Canada 402 million hectares

^a NFI 2003. ^b As at June 2006. ^c Native forest area from NFI 2003 and plantation area as at June 2006.

Source: National Forest Inventory 2003, National Plantation Inventory 2007, Bureau of Rural Sciences, Canberra.

Forestry In Australia - Production

figA forest area and log removals
Australia



Note: Data for plantation areas are reported on a calendar year basis. In this graph, data for 2006 appears in the 2005-06 column.

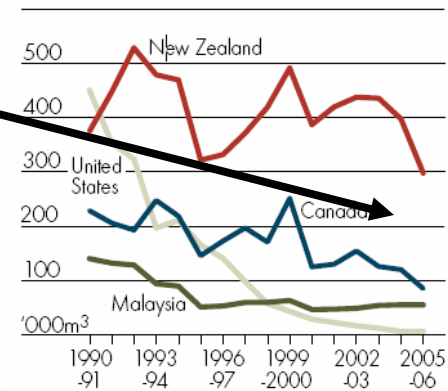
- Plantation softwood area remained steady and production increased moderately.
- Both Eucalypt plantation area and production increasing dramatically.
- Native hardwood removals declined.

Forestry In Australia – Sawn Trade

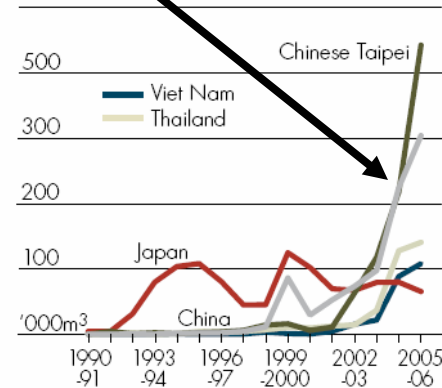
- Sawnwood imports have declined 9% over the last ten years.
- Exports have increased dramatically during the same period.
- ~\$300M deficit in sawn products.



figC Australian sawnwood imports, by source



figD Australian sawnwood exports, by destination



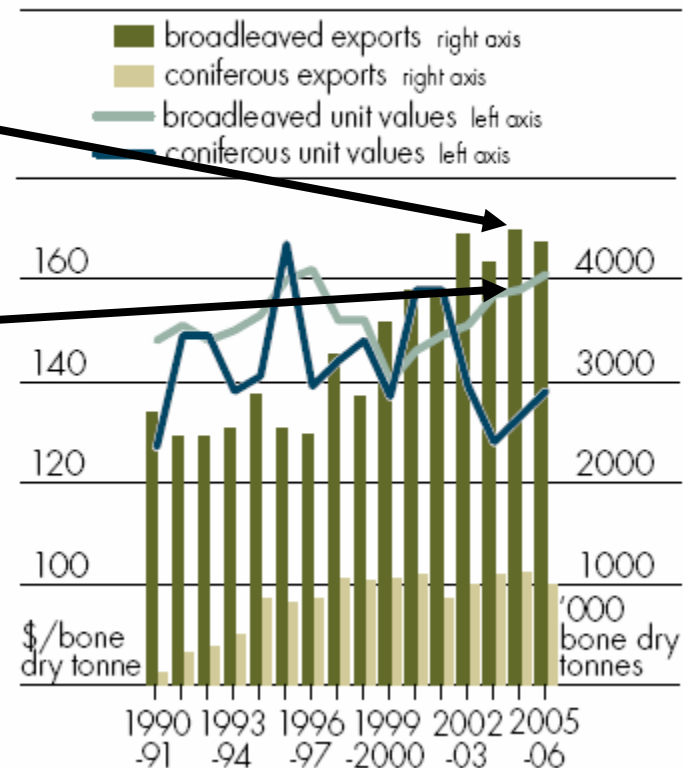
Forestry In Australia - Fiber

➤ Woodchip exports for both softwoods and hardwoods have increased.

➤ Commodity prices for export hardwood woodchip have been attractive.

➤ Still a wood product deficit of almost \$2 billion, mainly due to imports of paper and paperboard.

figE woodchip export volumes and unit values



Australia's growth in forestry has come at a cost

Australia ranked third in the United Nations' 2006 Human Development Index



Changing demographics and culture.....

A changing Australia

Similar to many developed nations....

- Urbanization
- Aging population
- Multiculturalism
- Social Justice
- Economy
- Environmentalism

Anti-windfarm campaigners welcome parrot funding

Anti-windfarm campaigners have welcomed Federal Government money to save an endangered parrot species.

The federal Environment Minister, Senator Ian Campbell, has announced more than \$3 million to preserve the habitat of the orange bellied parrot.

Senator Campbell recently overturned planning approval for the Bald Hills windfarm in south Gippsland, saying it would harm the parrot, but is now reconsidering his decision.

Tim LeRoy from the Tarwin Valley Coastal Guardians says the bird is critically endangered.

"People need to realise there's only 200 of these birds left on the planet, now there may be small parrots but imagine if there are only 200 elephants left in the world, there'd be an enormous outcry," he said.

"So I think the Minister's showing a lot of fortitude in making this decision."



Australia ranked third in the United Nations' 2006 Human Development Index



Changing demographics and culture.....

Forestry In Australia Is Changing too!

Forestry is an idea, a concept resulting from human thought and experience; it has no other reality.Forestry as an idea can only survive if it is relevant and meets community aspirations.

Foresters have had to face a paradigm shift in which production of timber is no longer paramount and an ecosystem management is more appropriate.

Increased involvement of foresters, as agents of communication.....will be important to the outcomes of SFM ideals.....If foresters are seen as champions of SFM by the wider community and prepared to accommodate community needs, their stature and respect will be enhanced.

Forestry far from dead but who killed the forester?

- Who are Foresters in Australia anyway?
 - What's forestry??
 - Plantation growers or timber producers only?
 - Agents of destruction in natural forests!
- Environmental Non Government Organizations have ran the environmental agenda.....and claim the morale high ground on change to the environment including forest management.



Why?

- In the past native forest management dominant and controlled by government and industry.
- Industry and government seen in collusion and slow to keep pace with change in community attitudes.
- Lack of sustained commitment from government and industry to education and communication.
- Foresters and policy makers thought they new best.
- Inability to shift from a polarized debate.



Environmental NGO's

- No longer seen as the radical fringe but part of the mainstream.
- Companies eager to join in partnerships with major ENGO's and have their logo's side by side in order to improve their own environmental and social credentials.
- Politics within and between NGO's sometimes constrains sound environmental, economic and social policy.



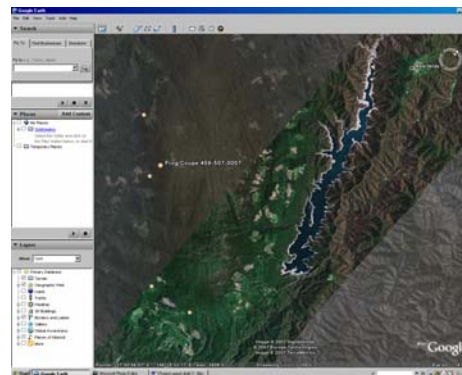
Trends in Public Debate

- Ongoing popular debate around issues involving nuclear power, whaling and forests continue to exist but have taken a back seat in Australia to broader aspects of the environment, mainly climate change, water use and biodiversity.
- By broadening the discussion it has ensured that all industries that may impact on such aspects have need to consider their environmental footprint.
- Anti-logging ENGO's have been quick to recognize this and attempt to tie forestry in a negative light to each of these aspects.



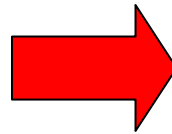
The Age of Digital Information

- Traditional media still used effectively.
- Easy and effective methods of disseminating information to what would generally be a younger audience at little or no real cost.
- Facts not important but images and emotion paramount.



Market Based Campaigns

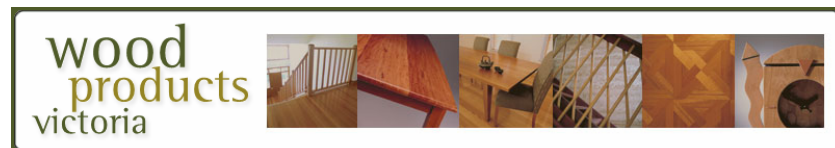
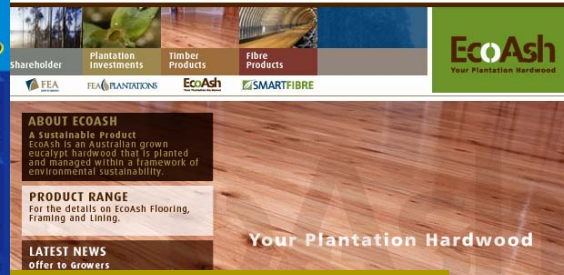
- Level of sophistication and influence of ENGO's has grown as they have become more experienced at campaigning and richer in funds.
- Focus has tended to shift towards the customers or business partners of target companies in an effort to persuade or pressure organizations



The Evils of Big Business and Government



Lots out there.....



A Confused Market for Wood?

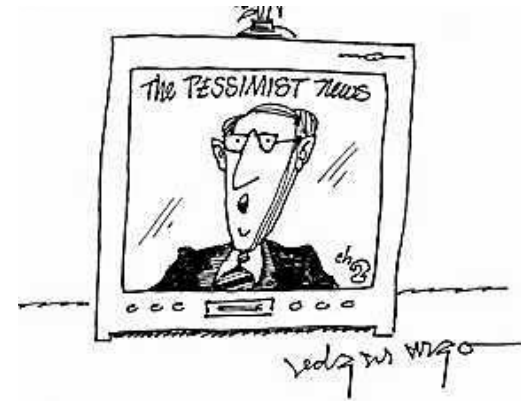
- Wood is bad! Wood is good!
- Green building...everything is green
- FSC or AFS – what does all this mean?
- Procurement policies
- Paper, paper and paper – imports, recycled, partly recycled, bleached, unbleached?
- Maybe substitutes are better
- Price and quality

Forest are managed very differently but did we remember to tell anyone?

- Regulation and regulation
- World class practices
- World class reserve system (60% native forest where production forestry occurs)
- Third party certification and auditing
- Technology driven
- Sustainability reporting
- Increased transparency
- Competitive sales

But.....with change comes opportunity!

- Industry rationalization and consolidation, less players
- A mood amongst leaders within the industry to structure effort
- Developing a coordinated approach to generic promotion
- Recognized need for consistent information (from local to global)
- Opportunity to lead direction



"THERE WAS A MILD OUTBREAK OF OPTIMISM ALL OVER THE WORLD TODAY.... BUT IT'S NOT EXPECTED TO LAST."

It is not necessary to change. Survival is not mandatory. ~W. Edwards Deming

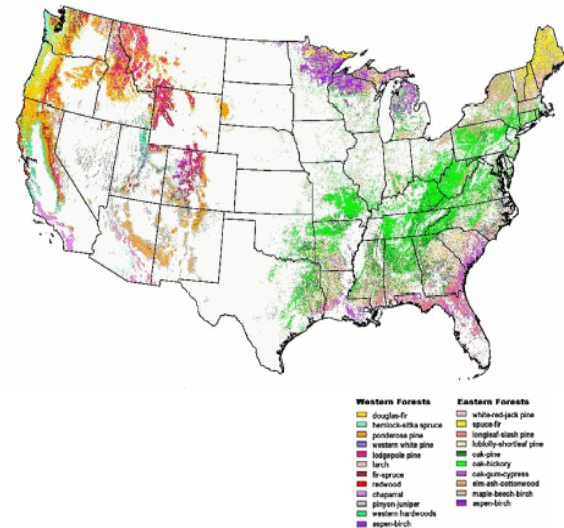


“In an environment of changing community views and expectations, I was interested in gaining an understanding of how forest industries in North America utilize timber and forestry promotional activities to maintain or improve market advantage and the ‘social license’ to operate.”

A Diverse and Immense Forest Sector

United States

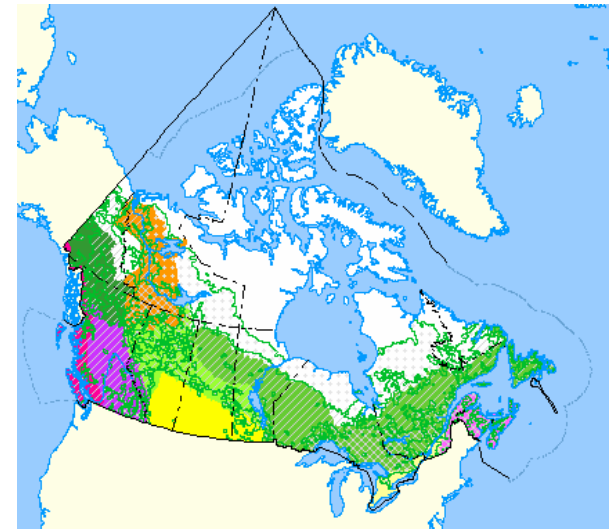
- Forest land is estimated at approximately 749 million acres or 304 million hectares.
- US the worlds largest producer...more than 200 million tons of wood and paper products per year or approximately 27% of global wood production.
- 1% towards a United States GDP valued at over \$10 trillion.
- Highly diverse forest ownership structure with differing management objectives.
- Wood products supply and distribution chain that employs approximately 1.7 million people.
- Over 130 million National Forest visits per year and high stakeholder interest characterizes the United States forestry sector.



An Diverse and Immense Forest Sector

Canada

- 402.1 million hectares of forest and other wooded land, representing 10% of the world's forest cover and 30% of the world's boreal forest.
- While the United States is a net importer of wood products, Canada exports approximately 54% of its wood products valued at \$41.9 billion in 2005.
- Canada is the world's largest exporter of forest products with the United States by far the largest buyer of Canadian forest products.
- Most of Canada's forest land (93%) is publicly owned with 77% under provincial or territorial jurisdiction and 16% under federal purview.
- Contributes 3% to GDP. Canada's forest sector supports about 800 000 direct and indirect jobs, almost 5% of all jobs in Canada.



Trends in North America

- Australia, the US and Canada are facing many similar issues in both the management of forest and the wood products industry.....
 - Ecosystem management
 - Increased forest regulation
 - Forest certification
 - Green building.....life cycle analysis
 - Climate change
 - Fire
 - Globalization
 - Consumer guilt about using forest products
 - Corporate Social Responsibility.....triple bottom line
 - Policies on forestry and forest product procurement
 - Environmental offsets

Plant A Forest For Me
Frequently Asked Questions



Can everything be green?

“Save a tree use PVC”

“As a tree, timber does symbolize environmental goodness. However, the processes necessary to make it a viable building material removes much of it's assumed green credentials.” www.concretecentre.com



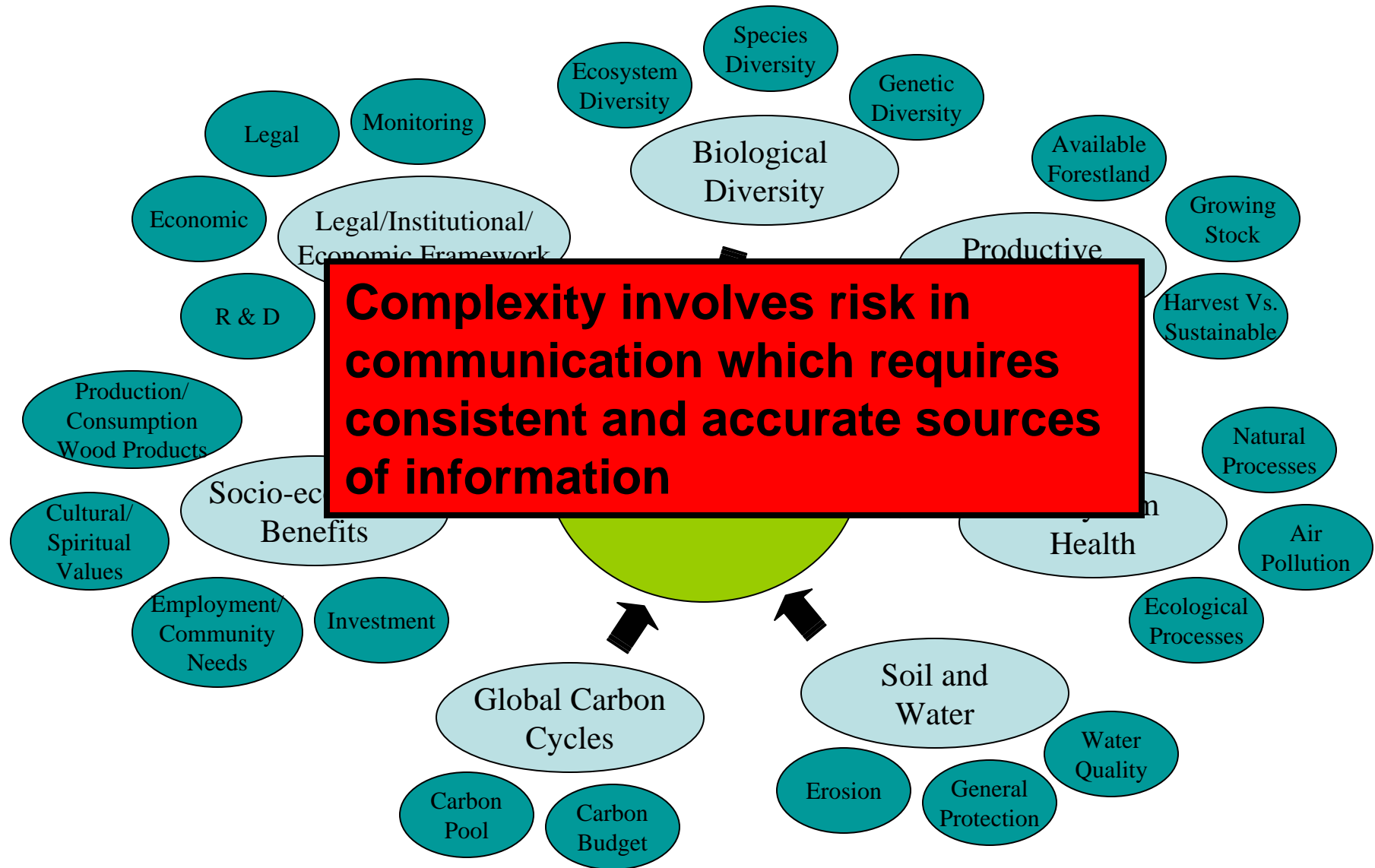
"Steel distribution poles require less maintenance and are much more reliable than other materials."

Dustin Olson,
Construction Supervisor,
Alameda Public Service

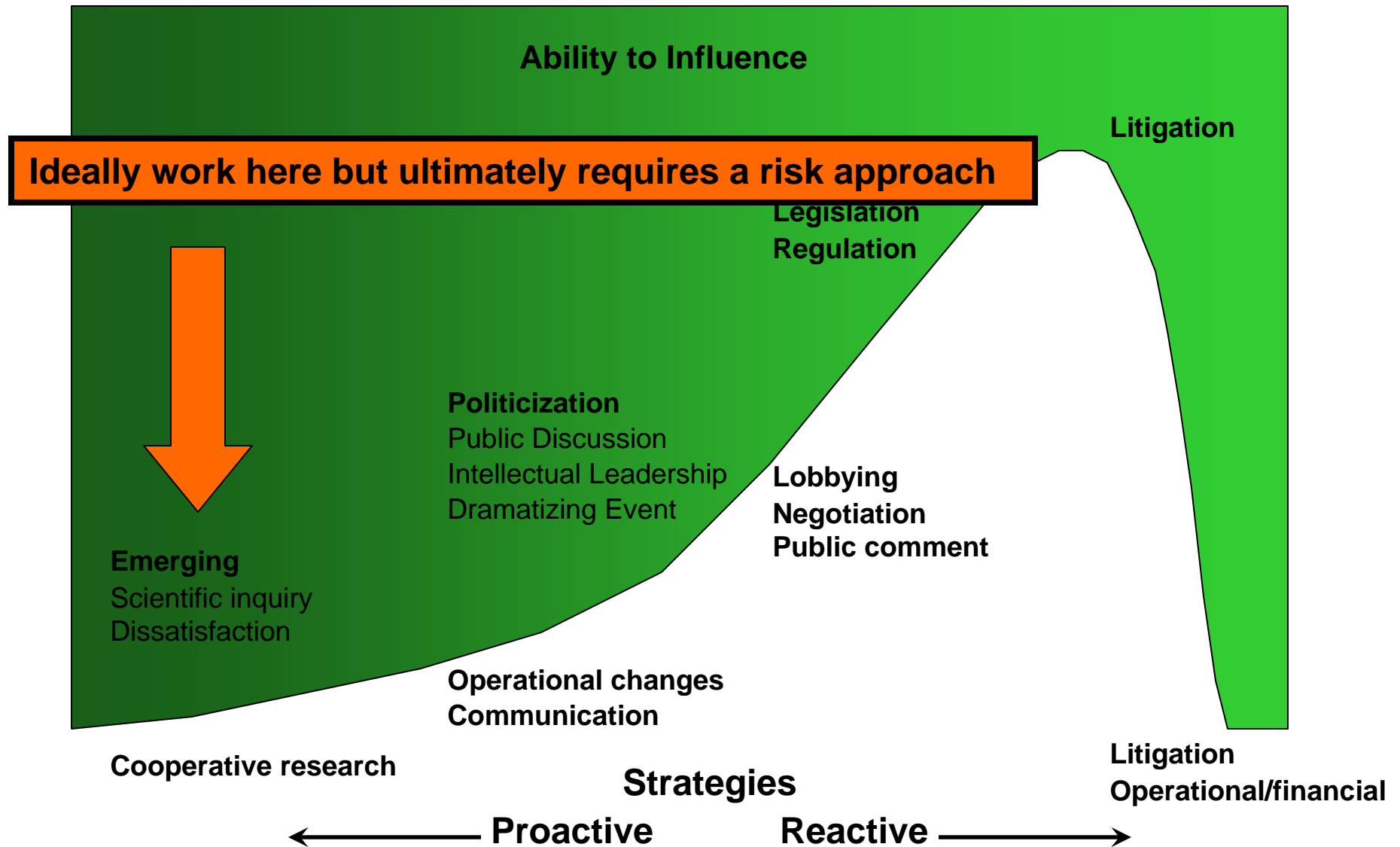
Challenges in effective communication

- Many forest owners with different management objectives.
- Highly complex supply and distribution chain when compared with other industries.tens of thousands of growers, primary and secondary processors, wholesalers, distributors and retailers.
- High level of public involvement and interest.....resources often reacting.
- So much information out there.....what to believe.
- Forestry is complex by nature and hard to articulate.....simple but meaningful messages.

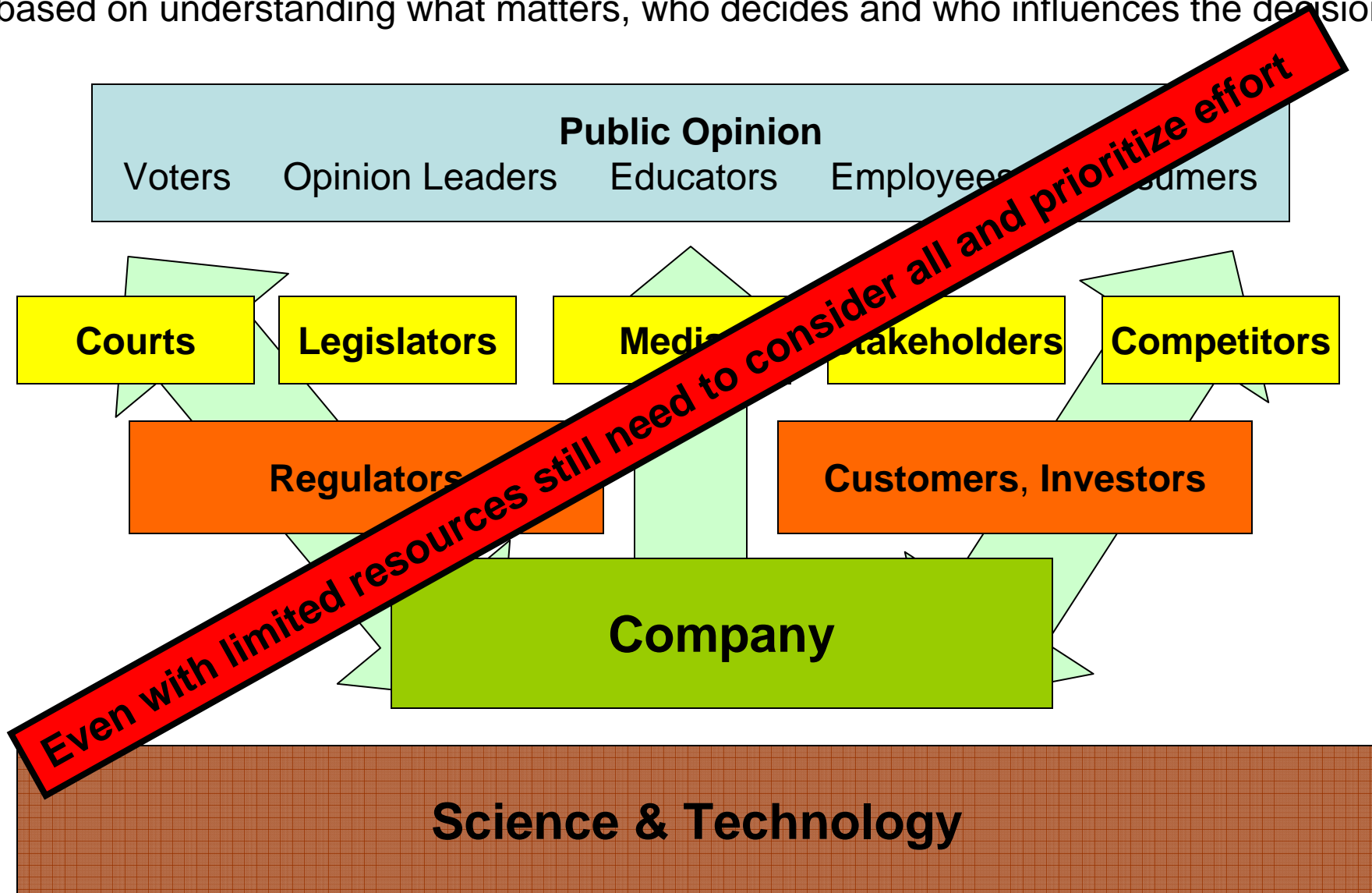
By it's very nature Sustainable Forest Management is complex



Life Cycle of a Public Policy Issue



System Architecture: Sustainable decisions are made by people – Strategies are based on understanding what matters, who decides and who influences the decisions



Science is knowledge

Strong institutional base for forestry and wood products research

Extension services aimed at getting the message out

Concern over level of future funding for forest research

Strong networks are a critical part of communication!

Enormous number of associations and conferences



Ensures relevance to members
but does it dilute effect?

Conduits for disseminating information and knowledge

Google Search [Advanced Search](#) [Partners](#)

Web

[National Hardwood Lumber Association](#)
Provides information on membership, events, publications, education, an inspection service and certification for hardwood **lumber**.
Map of 6630 Raleigh Lagoon Rd, Memphis, TN 38134
[www.nathardwood.org/](#) - 5k - [Cached](#) - [Similar pages](#)

[NAWLA - North American Wholesale Lumber Association](#)
NAWLA is the unifying force for efficient distribution within the forest products and building materials industries.
[www.lumber.org/](#) - 19k - [Cached](#) - [Similar pages](#)

[Northeastern Retail Lumber Association](#)
Provides membership information, news, regulatory information, and member services.
[www.nrla.org/](#) - 25k - [Cached](#) - [Similar pages](#)

[SLMA - Southeastern Lumber Manufacturers Association, Inc.](#)
Includes meeting schedules, new member lists, committee directorates, and press releases.
[www.slma.org/](#) - 11k - [Cached](#) - [Similar pages](#)

[Northwestern Lumber Association](#)
AN association of and for Retail Lumber Dealers and suppliers, wholesalers and distributors of products they use.
[www.nlasso.org/](#) - 17k - [Cached](#) - [Similar pages](#)

[Lake States Lumber Association](#)
Lake States Lumber Association promotes sustainable forestry initiatives, responsible stewardship of our timber resources and the multiple use of our state ...
[www.lakestateslumber.com/](#) - 6k - [Cached](#) - [Similar pages](#)

[Western Red Cedar Lumber Association](#)
A non-profit trade association representing producers of western red cedar. Participating Members have access to powerful marketing, promotional and ...
[www.wrcia.org/](#) - 21k - [Cached](#) - [Similar pages](#)

[Lumbermen's Association of Texas](#)
LAT is one of the strongest, largest and most service-oriented federates of the National Lumber & Building Material Dealers Association ...
[www.lat.org/](#) - 21k - [Cached](#) - [Similar pages](#)

[APA - The Engineered Wood Association](#)
APA - The Engineered Wood Association, a non-profit trade association with 70 years of experience, is the authoritative source for information on structural ...
[www.apawood.org/](#) - 17k - [Cached](#) - [Similar pages](#)

[American Wood Council Directory of Wood Products Industry Associations](#)
American Wood Protection Association (formerly American Wood Preservers' Association) ... Florida Wood Council / Florida Building Materials Association ...
[www.awc.org/links/directory/index.html](#) - 75k - [Cached](#) - [Similar pages](#)

[National Wood Flooring Association - Consumers Source For Wood](#)
Whether you are looking for information about prefinished wood floors, job site finished wood floors, or even tips on refinishing wood floors, the National ...
[www.woodfloors.org/](#) - 16k - [Cached](#) - [Similar pages](#)

[Western Wood Products Association > WWPA Home](#)
A trade association representing softwood lumber manufacturers in 12 western states and Alaska.
[www.wwpa.org/](#) - 53k - [Cached](#) - [Similar pages](#)

[International Wood Products Association](#)
Welcome to the International Wood Products Association. You are encouraged to use this website to learn more about IWPA's programs, its members, ...
[www.iwpa.org/](#) - 2k - [Cached](#) - [Similar pages](#)

[AWPA - The American Wood Preservers' Association](#)
An international, nonprofit technical organization founded in 1934 to provide a common forum for the exchange of information for all segments of the wood ...
[www.awpa.com/](#) - 11k - [Cached](#) - [Similar pages](#)

[Wood Products Manufacturers Association - wpma.org](#)
Wood Products Manufacturers Association (WPMA), a resource for manufacturers and wholesalers in the wood products industry.
[www.wpma.org/](#) - 20k - [Cached](#) - [Similar pages](#)

[National Wood Flooring Association - Wood Flooring Professionals](#)
Welcome to the National Wood Flooring Association's members-only web site - the ultimate source of information for wood flooring professionals.
[www.nwfa.org/](#) - 15k - [Cached](#) - [Similar pages](#)

[Ohi National Wood Carvers Association](#)
Links to woodworking websites for amateur and professional carvers and whittlers. Membership fee includes subscription to ChipChats printed magazine.
[www.chipchats.org/](#) - 3k - [Cached](#) - [Similar pages](#)

[Vermont Wood Manufacturers Association](#)
Representing companies that make lumber, flooring, millwork, furniture, housewares, toys, and components for other wood items.

Education Centers

- Tillamook Forest Center
 - Surrounded by forest
 - Forest history, wildfire, sustainable forest management.
- Weyerhaeuser's Mt St. Helens Forest Learning Center
 - Uses the rehabilitation efforts around Mt St. Helens as a background to sustainable forest management.
- World Forestry Center
 - Forests in a global context



About OFRI

The Oregon Legislature created the Oregon Forest Resources Institute (OFRI) in 1991 to improve public understanding of the state's forest resources and to encourage environmentally sound forest management through training and other educational programs for forest landowners. OFRI is funded by a dedicated harvest tax on forest products producers.

Known and secure source of funding enables effective building of programs

- Classroom programs and field activities for K-12 students
- Workshops and curriculum support for teachers
- Tours demonstrating modern forest practices
- Conferences, publications and scientific research on timely forest topics
- Workshops to help landowners manage according to best forest practices
- Displays, interpretive program, and the Rediscovery Forest at Oregon Garden
- Web site for forest industry employees

People are part of sustainability and ecosystems

OREGON FOREST RESOURCES INSTITUTE

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1/17/2008
AOL Annual Convention
More Info

1/23/2008
Sustainable Forestry and Forest Product Promotion
More Info

1/27/2008
Harvesting Clean Energy 2008 Conference
More Info

2/13/2008
Converting Agriculture to Forestland in Southwest China
More Info

Welcome to Oregon's Forests

The Oregon Legislature created the Oregon Forest Resources Institute to improve public understanding of the state's forest resources and to encourage environmentally sound forest management through training and other programs for forest landowners. OFRI is funded by a dedicated harvest tax on forest producers.

Oregon's Forest Protection Laws Do Great Things

They require:

- Planting after harvest
- Protection of forest streams and water
- Protection of fish and wildlife habitat

Click to view TV spots:
["Landowner"](#) ["Teacher"](#)

[Learn more from our Forest Facts Web site](#)

Landslides and Forestry

The Oregon Department of Forestry conducted a Storm Impacts and Landslides study after a series of intense storms and floods in 1996. One of the goals of this study was to determine landslide frequency and impacts as they relate to forest practices and forest stand structure.

- View the OFRI Fact Sheet: Landslides
- View the Oregon Department of Forestry Summary Sheet: Landslides and Debris Flows
- View the Oregon Department of Forestry Storm Impacts and Landslides of 1996: Final Report

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Oregon Forestry: Forest Fires...Sustainability forests Oregon wildfire fire fighting thinning Fitzgerald OFRI
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Oregon Forestry: Contributions
Contributions made by OFRI and the people of Oregon...Sustainability forests Oregon recreation habitat economy Salvasser OFRI
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Views: 254
From: [oregonforests](#)
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Oregon Forestry: Generations
A video by Oregon Forests Resources Institute about sustainability through generations...oregon forest generations sustainability
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00:32
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Lost forest
Last seen fighting climate change If found, please call: [www.kleerout.net](#)

Forestry Degrees
OSU Forestry Turns 100 Get a Forestry Degree From OSU [www.OregonState.edu/Forestry](#)

Southlake Church
A casual, contemporary Christian church in the Portland metro area! [www.southlakechurch.com](#)

Willamette Aviation
Rental - Training - AvGas - Aurora's Pilots Hang Out Here! [www.willametteair.com](#)

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MuGRAMMY Moment
Presented By CHASE 50 GRAMMY Awards

U.S. Department of Agriculture FOREST SERVICE **Black Hills National Forest** U.S.D.A. Forest Service

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Black Hills National Forest Podcast-ForestNet

The Black Hills National Forest is making Podcast available to the public as another way to deliver audio and video information. The files are easily downloaded and can be played on your office or home desktop computer, portable Mp3 player, or laptop since they are initially being distributed in Mp3 and .mov files.

These Podcast are short (usually 5-7 minutes) quick briefs of current events or issues. From time to time, we'll add programs that are longer in the form of speeches and video presentations.

New Podcast will be added periodically.

Recent Podcast

October 18, 2007 - ForestNet Podcast Topic: "Paha Sapa" - American Indian Use of the Black Hills with Donovan Sprague, Director of Learning at Crazy Horse Memorial and Executive Director of First Nations Heritage Association (Duration: 46:00)
(Click to Play Mp3 or right click and Save Target As)

ForestNet

October 16, 2007 - ForestNet Podcast Topic: Gifford Pinchot: A Life of Leadership with Char Miller, Director of Urban Studies, Trinity University, San Antonio, Texas (Duration: 1:02:00)
(Click to Play Mp3 or right click and Save Target As)

ForestNet

March 30, 2007 - ForestNet Podcast Topic: Dave Foreman, Founder of Earth First! and Director of the Rewilding Institute. ForestNet spoke with Dave while attending a U.S. Forest Service Public Affairs Conference in Santa Fe for the Rocky Mountain Region and Southwest Region.
Host: Gary C. Chancey. Guest: Dave Foreman, Founder of Earth First! and Director of the Rewilding Institute, New Mexico (Duration: 20:00)
(Click to Play Mp3 or right click and Save Target As)

ForestNet

September 25, 2006 - "Jewel Cave Today" Topic: Recent and ongoing barometric wind research at Jewel Cave. Jewel Cave National Monument, a unit of the National Park Service located west of Custer, South Dakota introduces its first Podcast. What does the wind have to do with a cave anyway? How long is Jewel Cave going to get? Can you walk through the cave like you would walk on a sidewalk? The answer to these questions and more on this edition of Jewel Cave Today.
Host: Gary C. Chancey. Guest: Mike Wiles, Jewel Cave National Monument, Cave Management Specialist, Custer, Dakota (Duration: 11:24)

Find a Forest (NF) or Grassland (NG)
Find by Map Region Get

Messages from the Forest Supervisor
[External Links to Related Sites](#)
[Evaluate Our Service](#)

USDA Forest Service Black Hills National Forest
1019 N. 5th Street
Custer, SD 57730
605-673-9200
Telephone for the hearing impaired: 605-673-9227

USDA **USFS**

Sometimes the simple thing in life are the best....getting out there and doing it.....



Linking Forests and Wood Product Use

- Aims to acknowledge that wood products are part of our everyday life.
- Need to be careful not to exacerbate guilt over using wood products.



Generic Wood Promotion Campaigns

- A trend over the last 10 years as a response to substitute product campaigns (steel, concrete, plastic) and mounting anti-wood campaigns.
- Pools resources and money into a collective effort.
- Acknowledges that substitute products and anti-wood advocates are the real competition.
- Ultimately aims to grow the wood market.



“Place of Origin” Branding

- Collective campaigns aim to differentiate based on geographic location.
- Leverages on consumers association with that place.
- Used by producers, manufacturers, retailers who conform to the brand attributes.
- Proven to be successful for some other commodities....think of the wine regions of the world.
- Real long term commitment from all involved required to be successful.
- Companies that operate over different geographic areas often not supportive.
- After 7 years additional \$40M to Californian milk campaign.

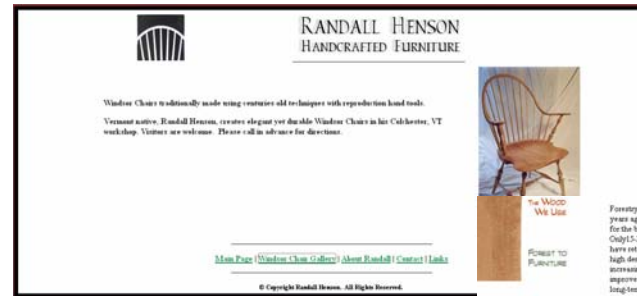


Vermont Brand



Symbolizes traditional values

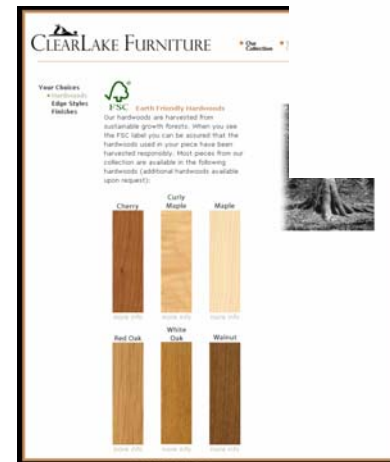
- hardworking
- handmade
- quality



Forestry also embodies sustainability, the art and science of growing trees. Over a hundred years ago, when much of this region was devoted to raising sheep for the booming woolen mills, Vermont was nearly treeless. Only 15.20% of the land remained wooded. Since then the forests have returned. Most splendid old trees are long gone and with the high demand placed upon the younger trees, silviculture is increasingly important. Selective cutting and timber stand improvement balance the present value of a harvest with the long-term value and health of the stand. Just like weeding a garden, a certain amount of what grows can be removed to strengthen, or in forestry terms release, the remainder. Many of the trees that can be taken are small in diameter or lesser in the correctness of economic valuation. It is within these trees that the answer to the question "what can we take?" is answered. It is also within these trees that we find the most interesting wood. This is the best source for character wood.

The Forest Stewardship Council (FSC) is an independent, nonprofit, international organization that works to restore forests through responsible forestry. It demands a certification program that establishes forest management standards regionally. Certification says that the Forester's work meets environmentally sound criteria and sound business keep the process on track. Evelyn Parsons is one of a group of foresters that use wood from certified forests. Look for the FSC mark on Evelyn Parsons Furniture.

► Continue to Sawmill



Case Study: The Wood Promotion Network

- Formed in 2000 to defend wood against substitute threats from steel, concrete and plastic.....
- To promote the environmental case for wood by delivering the message that North American forests are abundant and growing.....
- To seek opportunities to grow wood markets longer term.
- Brought together a coalition of more than 330 companies and allied organizations to leverage delivery of key messages.



“The goal isn't to speak with one voice, but to have thousands of voices, all carrying a few simple messages.”

Case Study: The Wood Promotion Network

- Developed and implemented a strategy to improve builder and consumer opinion of wood as a building material.
- Recognized that builders make 80% of residential wood use decisions.
- Trade audiences wanted environmental concerns addressed with customers.
- Short-term: Aimed at reducing business risk
 - Trade effort included print advertising, partnerships and event sponsorships, builder outreach, media relations, direct mail and web-based communications
 - Consumer effort included television and print advertising, supported by high profile media and web-based communications.
- Longer-term: Growing the market
 - Based on results from short-term campaign recognised the opportunity to grow the wood market.

Case Study: The Wood Promotion Network

Some Examples

- Partnership with Ford
 - Recognizing that builders are important to both sectors. Give away Ford vehicles via trade shows and building magazines.
- Media
 - Using high profile personalities to leverage media.....Lou “Mr Fix-it” Manfredini
 - Creating media events like the “build a house in a day”
- Sponsor
 - International builders shows
 - Green building conferences
- Builders outreach
 - Technical support

Case Study: The Wood Promotion Network

Measured success

- In three years improved home builders view that wood is an all round better building material by 13%, from 62% to 75%.
- Improved builders perception that wood performs well in terms of the environment by 13%, from 75% to 88%
- The number of builders who agree that forests are abundant increased 9%, at 47%.
- The number of involved consumers who believe concerns about forests are easing increased 7%, from 33% to 40%- but the number who disagree with that statement decreased from 64% to 49%.

Case Study: The Wood Promotion Network

But.....campaign winding up and will completely finish this year.

Why?

- Shift towards issue based communication strategies.
- Paper industry moving in a different direction to solid wood industry.
- Lack of perceived need to enter the long term phase?

A Perspective

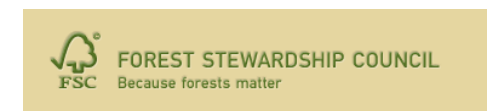
“Very difficult to create the critical mass needed to get a program going and once it is going it is a challenge to keep it going. The reasons were pretty basic, when the market is good the industry does not feel the need to promote anything and when the market is bad no one has the money to do anything. And the industry is so fragmented. In the end what the final downfall for the WPN was that the paper industry wanted to go in a different direction from the solid wood industry.”

Targeting issues of the day rather than Generic Wood Promotion

- Green globe
 - A response to the growing green building market
 - Provides competition for United States Green Building Council LEED's program.



- Sustainable Forestry Initiative
 - A response to growing awareness around forest certification.
- Wood WORKS! (Canadian Wood Council)
 - Is a national campaign to increase the use of wood in commercial, industrial and institutional construction. Growing the market.



Abundant Forest Alliance

- Alliance of 8 large wood and paper companies.
- One mission — to reassure target audience that there will always be plenty of forests.
- Renew, reuse and recycling a strong theme.

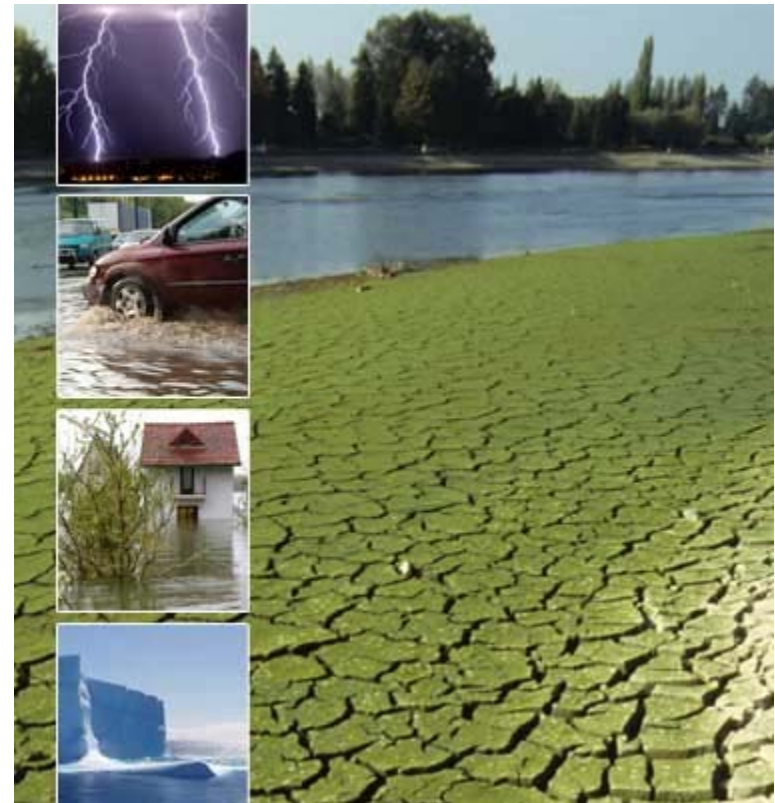


- Targeted at specific consumer groups.
- Provides consistent information to the customers of wood and paper companies.

And now for the 3 top environmental issues of the day, in order they are:

1. **Climate Change**
2. **Climate Change**
3. **Climate Change**

- Lots of discussion and research
- Science and integrity in debate crucial
- Huge risk but represents a new way of defining the industry
- Emphasizes the importance of Life Cycle Analysis
- Factual communication will be critical given the history of the issue...not to be exploited



Three final thoughts

- Well managed wood promotion campaigns can influence consumer or market views and are critical to maintaining or improving market. However, the challenge for any program to be successful is gaining the support of stakeholders and then maintaining that support.
- Social attitudes towards forestry will continue to evolve. A commitment to the science that underpins Sustainable Forestry Management is essential if foresters wish to stay relevant or contribute to the debate on how our forests are managed in the future.
- While short term marketing programs can assist in maintaining or growing the market for wood, the long term future and health of the industry will be determined by broader community views around forestry and its products. A commitment to forestry education should be seen as a long term investment in maintaining a healthy industry.

If we are interested in the long term we have to communicate our message!