

Measuring Timber Certification

INDUSTRY SECTOR: TIMBER IMPORTING & TRADING

TECHNICAL NOTE

RESEARCH PURPOSE, METHODOLOGY & ANALYSIS

Background to the Research

By the middle of 2006, there still was no reliable quantification of the extent of product certification of imported timber and sheet materials. The Timber Trade Federation (TTF) wished to provide a clear understanding of the availability of certified materials for the benefit of securing more and better informed timber and sheet materials specification.

Purpose of the Research

1. To make an estimate of the quantity of certified timber available from recognised certification schemes.
2. Further, to determine the share - by scheme - of certified timber available for sale within the estimated total of UK imports.

Scope of the Research

The scope of the measurement of certified timber availability was to include the mainstream timber and sheet materials (panel products):

sawn softwood, sawn hardwood, softwood plywood, hardwood plywood, particleboard, OSB and MDF.

The schemes for which data was required were:

Programme for the Endorsement of Forest Certification (PEFC);

Forest Stewardship Council (FSC); Sustainable Forestry Initiative (SFI); Canadian Standards Association (CSA); Malaysian Timber Certification Council (MTCC).

Estimates were required for the UK as a whole.

Research Methodology & Sample

To provide the widest possible coverage of the import sector whilst keeping costs to a minimum - in this first attempt at quantification of certification in the import sector of the timber industry - it was decided to use e-mail and telephone as the prime methods of contact to a carefully selected sample of companies using a short (four question) survey form as the means to capture the required data.

The sample selected comprised three groups: twenty TTF Members (large and small companies), five timber importing non-TTF Members and the five terminal operators in the UK. Twenty two of the thirty companies contacted responded with information. This small number of companies accounted for over 44% of all import volume, after allowance was taken for potential double-counting. Each of the terminal operators was requested to estimate their volume sales to timber importers which allowed a proportion of the volume imported to be removed in order to avoid double counting.

Analysis

The analysis conducted, after taking full account of the differences between larger and smaller companies, has resulted in an estimate of the proportion of imported products that were certified in 2005, with a further estimate of progress in 2006. The research has also estimated the underlying level of demand for certified products from timber using markets.

The report, "Measuring Timber Certification - Timber Importing & Trading" is concerned solely with the importing sector of the UK timber industry.

The importing sector is defined by the volume of timber and sheet materials that originate from non-UK countries and as usually purchased by:

- timber importers,
- timber merchants,
- builders merchants,
- other distributors and terminal operators (*integrated forest products companies with stock holdings and direct sales operations to merchants, importers and manufacturers in the UK*).

The measurement of volume and consequently the volumes of certified timber and sheet materials, is made at the point of entry to the UK, before onward sale to the supply chain.

The research was carried out between August and November 2006.

Each participating company was requested to supply information on their total purchases by:

- total volume,
- the volume certified,
- the scheme under which these volumes were certified and
- the amount by which these volumes might change between the two years 2005 and 2006.

The research was conducted by *timbertrends*, an independent industry analyst, thereby guaranteeing total confidentiality for each company supplying information.

The final report on this research was issued in January 2007 and is available on request from the Timber Trade Federation.