Measuring Timber Certification

Industry Sector: UK Timber Harvesting

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Over 80% of the UK Forest Harvest is Certified

The ubiquity of wood in everyday life and the usefulness to which wood and wood-based products are put, places a great responsibility upon its producers. As with the many other producers and processors of timber products, timber harvesting operations need to demonstrate responsible and ethical practices in the logging and sale of forest products. The focal point of good practice is identified through the ability of harvesting firms to be able to prove that the timber felled derives from well-managed and sustainable sources. This is often achieved through the harvesting of roundwood that is certified. In the UK, many forest owners and managers are able to assure buyers and users that wood and wood products from their forests are sustainably managed through compliance with the United Kingdom Woodland Assurance Standard (UKWAS). This standard has been designed for use in the certification of UK woodlands, providing verification of the sustainable nature of forest management practices.

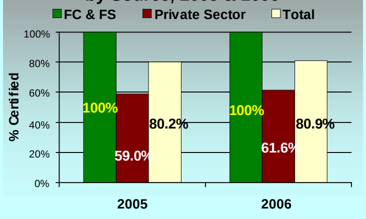
It is equally important to note that uncertified material derives from forests managed in *accordance with comprehensive Government standards* and is therefore from sustainable and well-managed sources where sound forest management and reforestation practices are in place.

In 2005, it has been estimated that around 8.26 million tonnes of softwood roundwood, were harvested from UK forests and delivered to saw mills, pulp mills, panel mills and a variety of other users.

The results of the research conducted to provide a measure of certified material harvested and delivered in the UK estimated that a little over 6.6 million tonnes, *or 80.2% of softwood roundwood harvested, met the requirements of the UK Woodland Assurance Standard and was certified under the Forest Stewardship Council (FSC) scheme in 2005.*

One of the objectives of the research conducted for this report was to determine the development of certification into 2006. Using data from the Forestry Commission publication, “United Kingdom Timber Statistics” and the information from the certification study research, it was determined that the quantity of softwood roundwood that is expected to be harvested in 2006 will be a little more than 8.63 million tonnes, representing a growth of 4.5%. Much of the increase in softwood roundwood harvested will be from the private sector. In 2005, all material from the public sector was 100% certified and it was estimated that 59.0% of private sector deliveries were certified. By the end of 2006, the certified proportion of private sector deliveries will have been expected to grow to 61.6% of all private sector deliveries, which would be sufficient *to marginally grow the overall percentage of certified harvested softwood roundwood in 2006 to 80.9%.* This would represent nearly 7 million tonnes of certified softwood roundwood delivered from UK forests in 2006.

Chart 1: Estimated % of Certified Softwood Roundwood Delivered by Source, 2005 & 2006



This report is concerned solely with:

the timber harvesting sector of the UK timber industry.

The measurement criteria used in this report are green tonnes for logs, small roundwood and roundwood chipped at the harvesting site. These products are collectively described as softwood roundwood.

Public sector woodlands are those owned and managed by the Forestry Commission of Great Britain and the Forest Service of Northern Ireland (FC & FS).

Private sector woodlands are owned and managed by private owners and management companies.

Main purpose of this initial study to ‘measure certified timber’

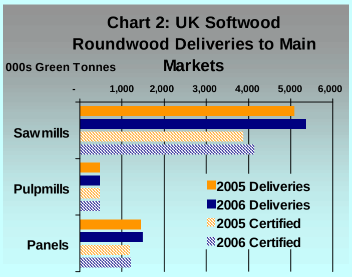
► To estimate the quantity of certified timber available for sale in the UK from recognised certification schemes.

Further content overleaf includes:
1. Consumption of certified softwood roundwood by main market
2. The projected development in 2006;
3. The demand for certified softwood roundwood;
4. Conclusions drawn and pointers to the future.

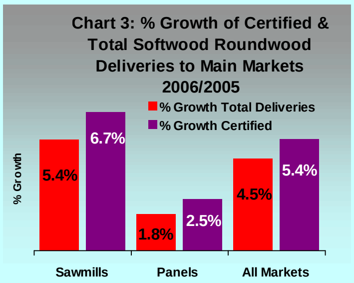
Certified Softwood Consumption by Main Markets

Parallel research into certification among sawmillers, pulpmills and panel producers has enabled estimates to be made of the quantity of softwood roundwood harvested from the private sector that was consumed by these and other markets in 2005. This information, coupled with data from the Forestry Commission and supplementary analysis, has resulted in estimates of the quantity of certified softwood roundwood consumed by these main markets, by source.

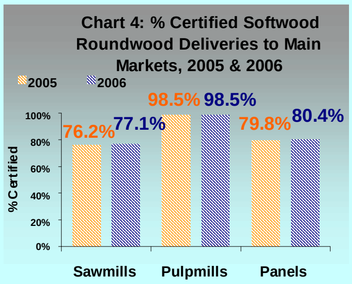
UK sawmillers comprise the largest market for UK softwood roundwood (62% of deliveries) and should growth in the proportion of certified roundwood occur in 2006, it is most likely to stem from growth in this market. The relative sizes and the amount of certified roundwood consumed by the three main markets is shown in chart 2.



As shown in chart 3, sawmill consumption is likely to have increased in 2006 by 5.4%, with growth in the amount of certified material consumed predicted to be higher at 6.7%. Also, the certified consumption of UK panel producers is expected to have shown growth in 2006, by a greater amount than overall consumption.



In 2006, for all markets combined, the rise in total consumption is expected to be 4.5%, and an increase in certified consumption of 5.4%. Quantities of all uncertified softwood roundwood will be seen to remain at similar levels to 2005, growing by only 0.6%. The continued development in the quantities of the certified consumption of UK sawmillers and panel producers will slightly raise, once more, levels of certification for these two major markets, as shown in chart 4. Already high levels of certification will result in no change for pulpmills in 2006.



Market Demand for Certified Softwood Roundwood

Quantities of certified softwood roundwood from public and private woodland is mostly *sold* as certified, according to the research conducted with harvesting firms. The difference between the amount of material supplied (as a matter of course) and that specifically demanded, has not been possible to detect from this research, but in common with research in other timber industry sectors, it appears that there is a distinction in the demand for certified material by the size of consuming company. Some larger consumers insist upon the provision of certified roundwood while generally smaller companies (but not all) e.g. smaller sawmillers, do not attach the same level of importance to certified supply.

Conclusions

The rate at which certified softwood roundwood is harvested is set to increase more slowly. As less Forestry Commission timber (all certified) is harvested, relative to private sector roundwood (not all of which is certified) the rate of increase in the harvest of certified private sector roundwood will have to be faster than the rate of overall supply. This is exampled by the predicted development for 2006, within chart 3 above, where a projected increase in the certified quantity harvested of 5.4% will have resulted from an increase in the public sector harvest of 1.8% and an increase of 11.9% from the private sector. These changes are expected to have yielded only a small overall increase in certification in 2006 to 80.9%. The ability for continued high levels of private sector growth is less certain however, without new, often smaller, private woodlands embracing certification or higher quantities becoming available from that part of the private sector already certified.

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