

# Forest Certification Update 2021: The Pace of Change

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## Executive Summary

The success of forest certification is apparent in positive growth trends over the past two decades. However, evolution is needed to support improved impact and measurable outcomes. Competition between certification programs can be beneficial, but it should be occurring in ways that make a meaningful difference in addressing drivers of deforestation, creating economic growth and employment opportunities, and supporting more equitable access to natural resources. Instead, marketplace behaviors have led to the expansion of double-certification and other inefficiencies. A starting place for arresting this trend is with supply chain influencers embracing a program neutral stance or at least a ranked choice approach<sup>1</sup> and allowing for alternatives rather than program exclusion.

The world gives little thought to how much forestland or wood is certified. To the extent governments, companies, conservation organizations, and others are paying attention, the questions are more along the lines of: *are forests being sustainably managed?* and *how can we responsibly source products from forests?* Certification has been able to serve as a proxy for the answers, especially as it experienced strong growth and seemed like a silver bullet solution. But the limitations of forest certification as the single answer to the diverse drivers of land use change have become increasingly clear. As a result, the past decade has seen steady growth of private and public sector alternative approaches manifested within supply chains, technology innovations, and government policies. To some degree, each of these developments pose a threat to the future of forest certification. However, this growing interest and innovation also presents the opportunity to revisit the original questions and recommit to identifying collaborative ways of securing the future of forests and forest products.

There is growing recognition that forests can be at the center of a circular bioeconomy, the structure for a healthy and more equitable built environment, and the source of global natural climate solutions. These opportunities are much bigger than the tools and solutions offered by forest certification, and they will require massive cooperation and significantly greater resources. To realize this potential for forests and forest products, relevant organizations must know how to work together to build alliances and reduce friction. Forest certification programs are going to have to double-down on their stated commitments to innovate, partner, and reach ambitious targets to stay relevant within these large-scale opportunities.

In this report, we provide an update on the major forest certification programs and benchmark their status globally and within North America. We also examine how marketplace and policy initiatives are outpacing certification and what is needed to keep these programs relevant in the years ahead.

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<sup>1</sup> A ranked choice approach would define an order of preference.

## Background

Since 2004, Dovetail Partners has been reporting on developments in forest certification. With more than fifty reports related to the topic, we have covered a lot of ground.<sup>2</sup> Our first report on third-party forest certification aimed at helping land managers determine if certification could be beneficial for them, and if so, which programs might be the best fit.<sup>3</sup> We recognized that forest certification starts with forests and that meant engaging landowners and land managers. We also released a series of “beginner’s guides” to introduce each of the emerging programs in those early years.

In 2010, our certification update highlighted growth and evolution in the various programs while emphasizing the need to support chain-of-custody adoption for manufacturer participation and supply chain development. With more and more forests getting certified, programs needed to ensure market demand and functionality. At that time, we also warned against marketplace differentiation efforts that force consumer choices and ultimately limit the power of certification to improve forest management.<sup>4</sup> In 2011, our team produced a comprehensive comparison of the SFI and FSC standards, the dominant programs in North America.<sup>5</sup>

Finally, in our most recent review of forest certification developments in 2015 we examined the latest changes in the standards and overall growth in the programs. We concluded that after twenty-years of development, the programs were at a transition point and potentially at risk of being challenged by alternative solutions.<sup>6</sup> That is where this 2021 report picks up.

## Introduction

The certification programs examined in detail in this report are:

- Forest Stewardship Council (FSC)
- Programme for the Endorsement of Forest Certification (PEFC)
- Sustainable Forestry Initiative (SFI)

These programs affect the most forest land globally and within North America. Additional reference is made to the American Tree Farm System (ATFS)<sup>7</sup> and Canadian Standards Association (CSA)<sup>8</sup>. To further understand the analysis of forest certification programs and their associated data, it is important to understand the relationships between them, as illustrated in Figure 1.

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<sup>2</sup> For Dovetail’s complete library of reports, visit: <https://dovetailinc.org/portfolio.php>

<sup>3</sup> *A Land Manager’s Guide to FSC& SFI*, available at: <https://dovetailinc.org/upload/tmp/1586445657.pdf>

<sup>4</sup> *Forest Certification: A Status Report*, available at: <https://dovetailinc.org/upload/tmp/1581778990.pdf>

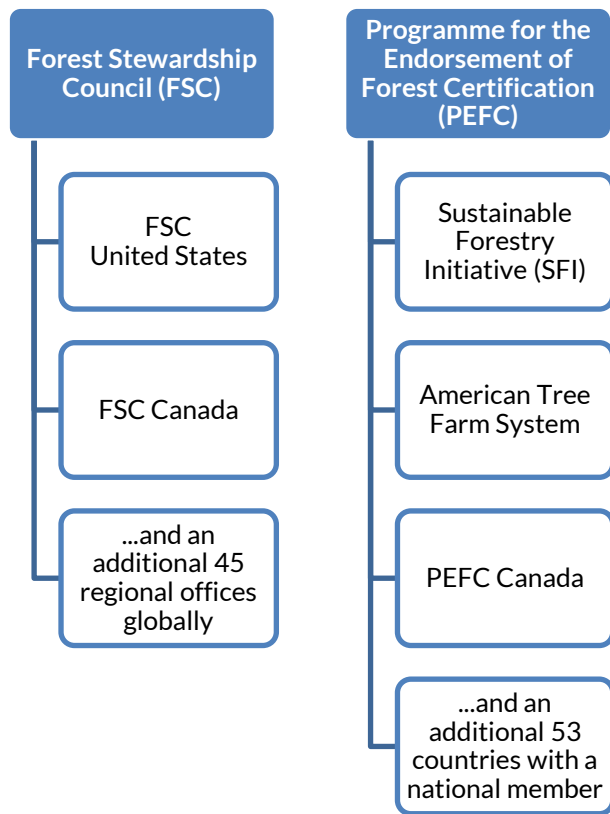
<sup>5</sup> *Differences Between the Forest Stewardship Council (FSC) and Sustainable Forestry Initiative (SFI) Certification Standards for Forest Management*, available at: <https://dovetailinc.org/upload/tmp/1581654356.pdf>

<sup>6</sup> *Forest Certification Update: Changes to the SFI and FSC Standards in 2015*, available at: <https://dovetailinc.org/upload/tmp/1579886382.pdf>

<sup>7</sup> The American Forest Foundation (AFF) is the parent organization for ATFS. The lead author of this report, K. Fernholz, was chair of the AFF Board of Trustees at the time this report was written in December 2020.

<sup>8</sup> PEFC Canada represents organizations in Canada that have certified their forestry operations to the PEFC-endorsed Canadian Standards Association (CSA) Sustainable Forest Management (SFM) standard, as well as organizations and businesses that are certified to the PEFC International Chain of Custody Standard: <https://www.pefccanada.org/>

**Figure 1. Forest Certification Program Relationships**



As shown in Figure 1, the two umbrella organizations are the FSC and PEFC that operate globally and which have their respective EU-based headquarters; Bonn, Germany in the case of FSC<sup>9</sup> and Geneva, Switzerland for PEFC.<sup>10</sup>

The sub-programs listed in Figure 1 operate within a single country, except for SFI that operates in the US and Canada. For the listing of all countries where FSC and PEFC have offices or country members, see Table A-1 in the Appendix. When examining the data for each program, it is important to recognize that information is aggregated through this layered structure and care must be taken to avoid double counting national and global reporting.

In addition to providing a structure for national level involvement, the FSC and PEFC global programs also provide a membership structure for stakeholders.<sup>11</sup> Certificate holders (i.e., forest owners, land managers, and forest product companies) are an additional category of participation in each program. Certificate holders have been audited and certified to the forest management and/or chain-of-custody standards of

one or more programs.<sup>12</sup> The following table (Table 1) provides information about each of these elements, including the offices and country members, certificate holders, and certified area globally for the FSC and PEFC programs based upon publicly available information as of December 2020.



<sup>9</sup> FSC’s structure is self-described as: “The Forest Stewardship Council International (FSC International) consists of the entities FSC Asociación Civil (FSC AC), FSC International Center GmbH (FSC IC) and FSC Global Development GmbH (FSC GD). FSC GD and FSC IC are subsidiaries of FSC AC. FSC has a number of regional offices, sub-regional offices and independent national offices around the globe.” <https://fsc.org/en/worldwide/locations>

<sup>10</sup> PEFC’s description of their national members: “Our national members are independent, national organizations that develop and run the national forest certification system in their country.” <https://pefc.org/discover-pefc/our-pefc-members/national-members>

<sup>11</sup> PEFC has 31 stakeholder members, <https://pefc.org/discover-pefc/our-pefc-members/international-stakeholders> ; FSC has 1,175 global members (organizations and individuals) in their three chamber system, <https://fsc.org/en/members>

<sup>12</sup> Listings of valid certificates are available at the program websites, for example: <https://info.fsc.org/certificate.php> ; <https://pefc.org/find-certified>

**Table 1. Summary of FSC and PEFC Program Structures and Certification Activity**

Program	North American Offices/ Members	Global Offices/Country Members	Certificate Holders, Forest Management (c)	Certificate Holders, Chain-of-Custody (c)	Certified area (hectares/acres), as of December 2020
FSC*	2	49	1,777 (a)	44,934 (a)	222 million hectares (548 million acres)
PEFC**	3	55	11,875 (b)	23,478 (b)	320 million hectares (790 million acres)

\* FSC Facts and Figures, <https://fsc.org/en/facts-figures>

\*\* PEFC Facts and Figures, <https://pefc.org/discover-pefc/facts-and-figures>

(a) Derived from database searches for valid certificates <https://info.fsc.org/certificate.php>

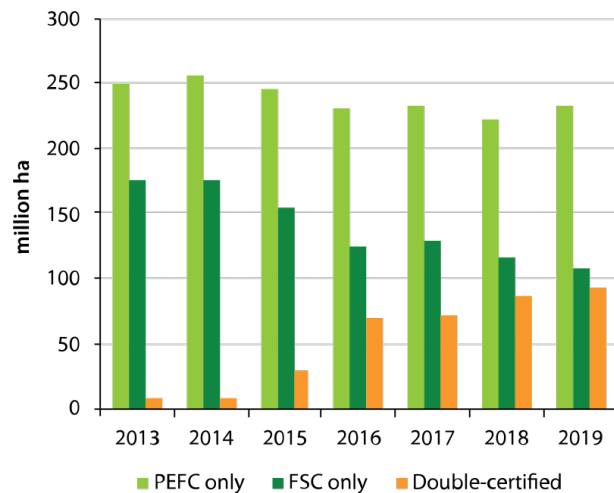
(b) Derived from database searches for valid certificates <https://pefc.org/find-certified>

(c) Certificate holders have been audited and certified to the forest management and/or chain-of-custody standards of one or more programs.

### Forest certification program trends and benchmarking, globally

Although it is tempting to do some simple addition and conclude from Table 1 that more than 540 million hectares (1.3 billion acres) are now certified globally, this is an overestimate. Double counting occurs when forestland is certified to both an FSC and PEFC standard. As shown in Figure 2, double-certified area has been growing in recent years and now represents about 18% of the total certified area. The total global certified area after adjusting for double counting is approximately 430 million hectares (1.06 billion acres). The area of certified forest reported in 2019 increased by 1.4% over the prior year and was slightly below the amount reported in 2017. The area of certified forest is equivalent to approximately 11% of the global forest area. The area of double-certified forests increased to 93 million ha (+8%) in 2019.<sup>13, 14</sup>

**Figure 2. Global Certified Forest Area, Adjusted for Double-Certified Area**



Sources: PEFC, 2020b; UNECE/FAO, 2019.

### Forest certification program trends and benchmarking, North America

Table 2 and Figure 3 further illustrate the growth in certified forest area. The data include FSC and PEFC global certified areas from 2005 to 2020. The data from FSC US, FSC Canada, and SFI show growth in certified forest area in North America for the same time period.

<sup>13</sup> Additional discussion available at: <http://www.unographics.org/fpamr/chapter-1.html>

<sup>14</sup> As of 2018, 16.5%, or 71.1 million hectares of forests were double certified. <https://www.pefc.org/news/double-certification-continues-to-grow-joint-pefc-fsc-data-shows>

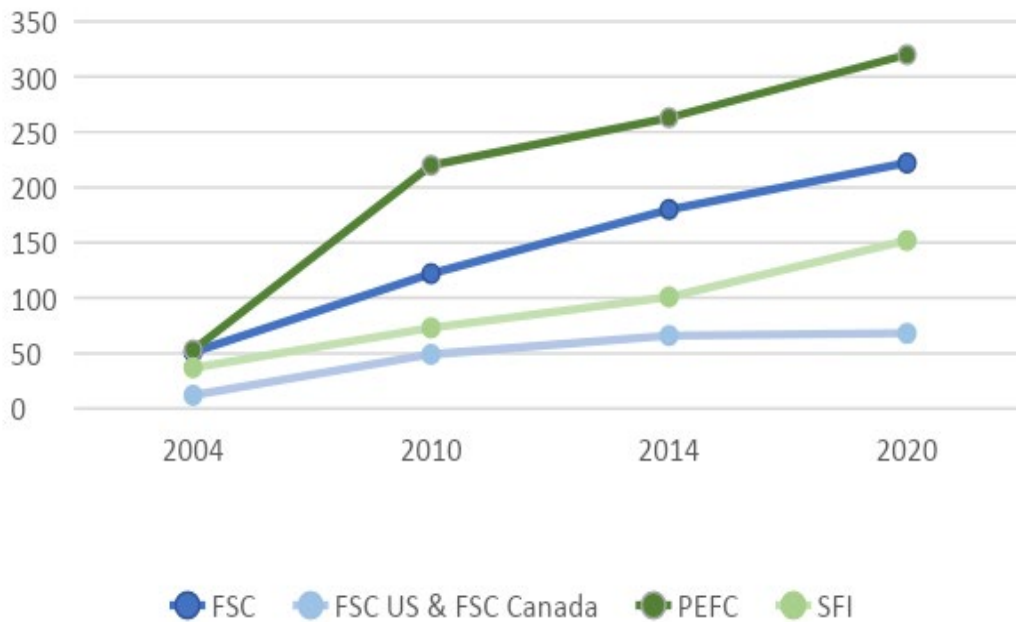
**Table 2. Growth in Major Forest Certification Programs Globally and in North America, 2004 - 2020**

Program	Certified Area hectares (ha) (acres)			
	2004	2010	2014	2020
FSC International	51 million ha (125 million acres)	122 million ha (300 million acres)	180 million ha (450 million acres)	222 million ha (548 million acres)
FSC US & FSC Canada	12 million ha (30 million acres)	49 million ha (121 million acres)	66 million ha (163 million acres)	68 million ha (168 million acres)
PEFC	53 million ha (130 million acres)	220 million ha (544 million acres)	263 million ha (649 million acres)	320 million ha (790 million acres)
SFI	37 million ha (91 million acres)	73 million ha (180 million acres)	101 million ha (250 million acres)	152 million ha (375 million acres)

Data compiled by Dovetail Partners.

As shown, both FSC and PEFC have grown consistently since 2000. In the first few years of the century, the two global certification schemes represented near equal amounts of certified area, until PEFC began to grow at a greater rate compared to FSC. The addition of North American certification programs (SFI, ATFS, and CSA) as PEFC members and endorsed programs between 2005 and 2008 drove this trend.<sup>15</sup>

**Figure 3. Growth in Forest Certification Programs, 2005-2020 (million hectares)**

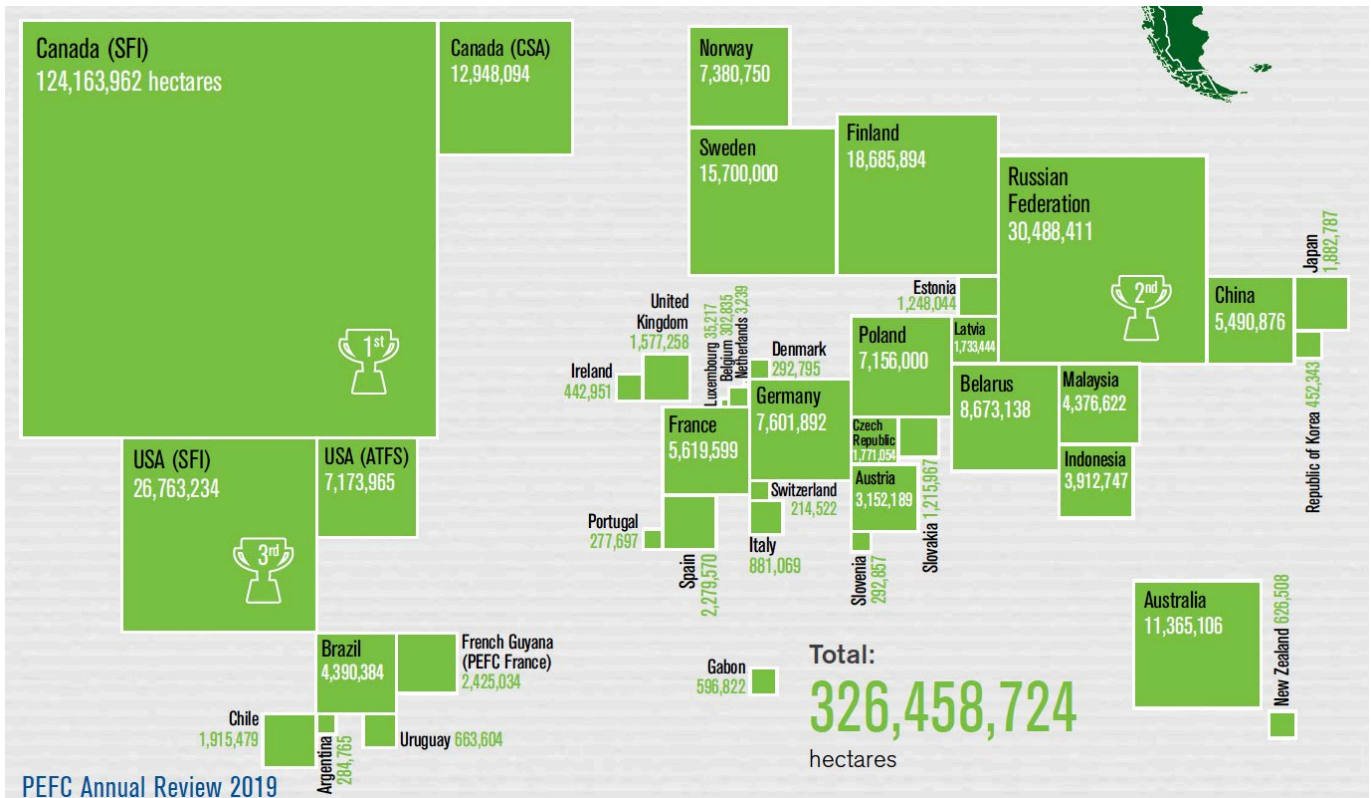


<sup>15</sup> SFI, ATFS, and CSA became PEFC members in 2001. CSA and SFI became PEFC endorsed programs in 2005. ATFS became a PEFC endorsed program in 2008.



Most certified forests are certified under PEFC, representing about 75% of the world’s certified forest area. The area of PEFC certified land is concentrated in North America, which represents about 52% of the total certified area for PEFC (Figure 4). An additional 36% is in Europe for a total of 88% of PEFC certified land being located within these two regions.<sup>16</sup> The SFI, ATFS and PEFC Canada<sup>17</sup> programs are included within PEFC, and thus contribute to the majority of PEFC certified land located in North America.

Figure 4. PEFC-Certified Forest Area Per Country (as of 31 Dec 2019)



Source: [PEFC Annual Review, 2019](#)

The distribution of certified area for FSC is similar but reversed with 33% of the FSC-certified area in North America and 51% in Europe for a total of 84% in these two regions (Figure 5).<sup>18,19</sup>

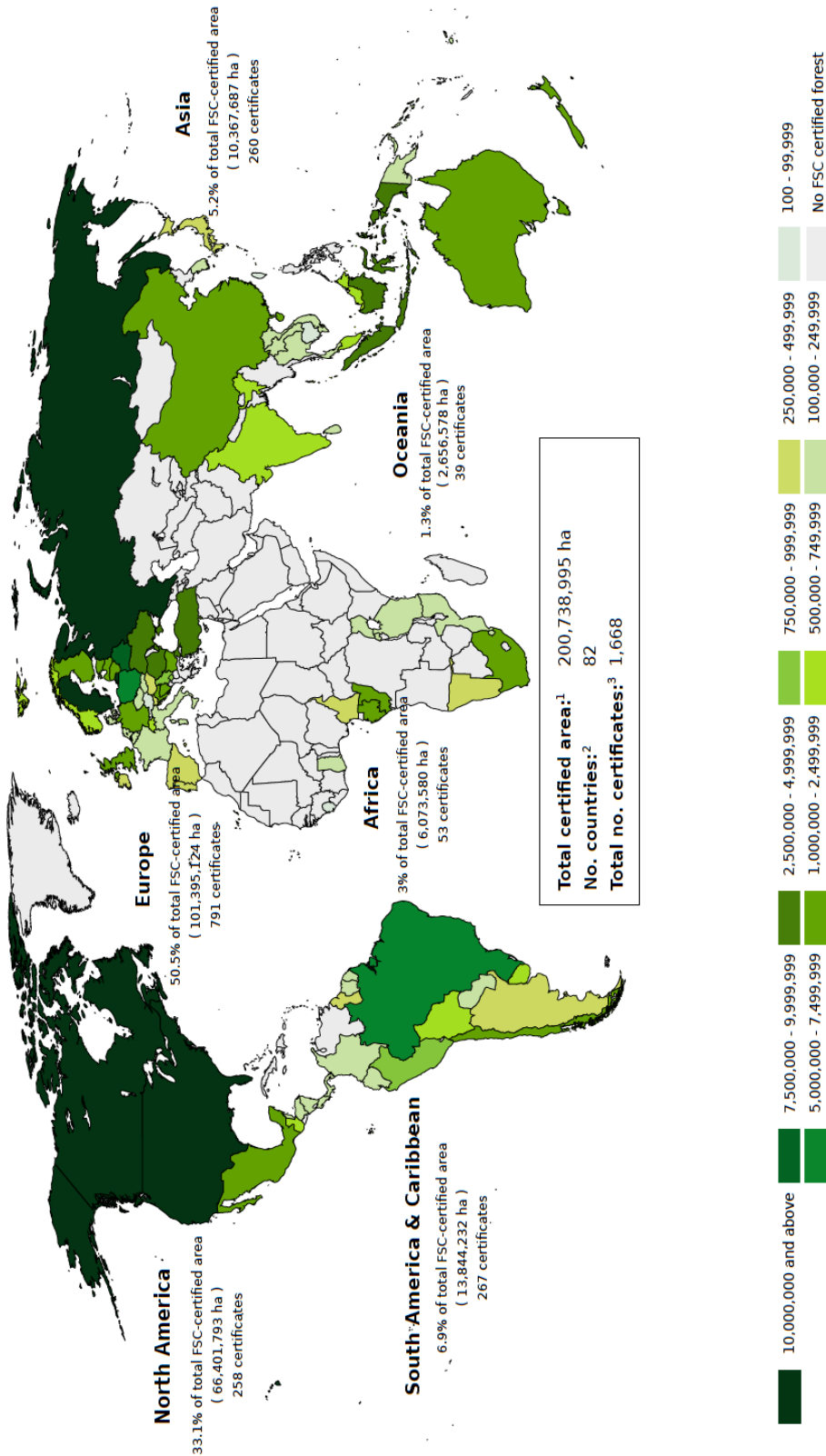
<sup>16</sup> [PEFC Global Statistics](#), September 2020

<sup>17</sup> PEFC Canada represents organizations in Canada that have certified their forestry operations to the PEFC-endorsed Canadian Standards Association (CSA) Sustainable Forest Management (SFM) standard, as well as organizations and businesses that are certified to the PEFC International Chain of Custody Standard. <https://www.pefccanada.org/>

<sup>18</sup> FSC Facts and Figures, <https://fsc.org/en/facts-figures>

<sup>19</sup> The need for extensive tropical forest certification has existed since the beginning of certification, and it is still a challenge. The continued lack of significant progress could be considered one of the failures of the current approaches. For further discussion of how tropical forest certification is lacking in comparison to temperate forest certification and the associated debate, see: *Forest Certification in the Tropics: Is the Glass Half Full or Half Empty?* <https://dovetailinc.org/portfoliodetail.php?id=5e907940bb47b>

Figure 5. FSC-Certified Forest Area Per Region (as of Dec 2019, source [FSC Facts and Figures, December 2019](#))



The FSC and PEFC programs both have large amounts of certified land in Canada, representing about 48 million ha for FSC (22%) and 134 million ha for PEFC (42%). Although both Canada and the US have significant forest regions,<sup>20</sup> the area of certified forest in North America is not evenly distributed between the US and Canada (Figure 4). Approximately 71% of the FSC certified forest area and about 80% of the PEFC certified area in North America is in Canada. Land ownership differences between Canada and the US contribute to this distribution pattern. Most forests in Canada are in large, public land holdings administered by provincial governments. These lands are controlled by governmental decision-making authority and the process of certifying a large land base can be accomplished relatively efficiently. The total area of certified forest in Canada is 168 million hectares, close to the theoretical maximum of 175 million hectares that are likely to be certified in the country based upon ownership patterns and other factors.<sup>21</sup> In the US, a large portion of forestlands (58%) are privately owned and commonly in smaller parcel sizes that are less likely to engage in certification. Additionally, the FSC program implemented significant policy restrictions on the certification of the large federally managed forests in the US and these barriers have only recently been mitigated.<sup>22</sup> Where large public land holdings exist in the US under state or local governmental control, forest certification has been adopted in a pattern that is not dissimilar to the Canadian experience.<sup>23</sup>

The area of FSC certified land in Canada is down 23% from a peak of 62 million ha reported in 2014.<sup>24</sup> As can be seen in Figure 3, certification by FSC US and FSC Canada has not been growing at the same rate as SFI certification in North America. The recent reduction in the area of FSC certified land in Canada is largely attributable to certificates not being continued due to controversies in boreal forest management and caribou habitat protections,<sup>25</sup> as well as adoption of a revised national forest standard.<sup>26</sup> The continued growth of SFI can be attributed to investments in Indigenous relations<sup>27</sup> and the SFI Forest Partners Program® that has resulted in increased certification, particularly with state forests.<sup>28</sup> With this continued growth, SFI is now 68% of the size of the FSC global program, even though SFI has only certified forestlands in two countries compared to the more than 80 countries for FSC. The SFI program has certified about 9% of the forests in North America and FSC has certified about 4%.<sup>29</sup>

## Recent FSC and SFI program activities in the US

The FSC US office recently engaged in a national strategic planning process spurring several related efforts. Current areas of activity and associated strategic goals include revision of the national standard to be completed in 2022,<sup>30</sup> implementation of effectiveness monitoring for the Controlled Wood National Risk Assessment (US NRA),<sup>31</sup> and

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<sup>20</sup> Canada has the 3rd largest forest area (990 million acres of forests) in the world and the United States has the 4th largest (747 million acres). These 2 countries are exceeded only by the Russian Federation and Brazil. [Read more here.](#)

<sup>21</sup> <https://www.woodbusiness.ca/canadas-changing-certification-landscape/>

<sup>22</sup> For further discussion of the barriers previously imposed within FSC US policy and other considerations, see: *Certification for the Management of the U.S. National Forest System*, available at: <https://dovetailinc.org/upload/tmp/1581625072.pdf>

<sup>23</sup> For further discussion, see: *The Great Lakes Region: A Forest Certification Hub*, available at: <https://dovetailinc.org/upload/tmp/1586525553.pdf>

<sup>24</sup> Russia now has the largest single country FSC certified area with 56 million hectares, up from 39 million ha in 2014. PEFC reports 31 million hectares certified in Russia.

<sup>25</sup> <https://fsc.org/en/newsfeed/fsc-launches-mediation-in-canada-to-ensure-responsible-forest-management>

<sup>26</sup> <https://ca.fsc.org/en-ca/standards/new-national-forest-management-standard>

<sup>27</sup> <https://www.forests.org/indigenous/>

<sup>28</sup> <https://www.forests.org/sfiforestpartners/>

<sup>29</sup> As of 2017, it was estimated that 23% of certified forest land in the US was double-certified. The percentage of certified forest in Canada was estimated at 51% of the total forest area and at 13% in the US after adjustment. Approximately 20% of timberland in the US was certified. For further analysis of forest certification trends in the US, [click here.](#)

<sup>30</sup> <https://www.engage.us.fsc.org/>

<sup>31</sup> <https://us.fsc.org/en-us/certification/controlled-wood/fsc-us-controlled-wood-national-risk-assessment-us-nra>



expansion of an adapted Smallholder Access Program.<sup>32</sup> There are also marketing efforts to expand demand for FSC certified solid wood in construction and furniture uses and to build stronger market connections for family forests and investing in Tribal relations.<sup>33,34</sup> FSC US has been successful in raising financial support for forest carbon impact projects to be developed further in the coming years.<sup>35</sup> FSC was recently included in the launch of the Amazon Climate Pledge Friendly Program, and BuildwithFSC.com is being developed to support FSC-certified construction products with more than 300 FSC certified companies participating.<sup>36,37</sup>

The SFI program's recent strategic planning process resulted in the identification of four priority areas of work: Standards, Conservation, Community, and Education.<sup>38</sup> The SFI Forest Management Standard is currently undergoing a revision process to be completed in 2021.<sup>39</sup> As mentioned previously, SFI has existing efforts in Indigenous Peoples engagement and goals for expanding forest certification in targeted supply chains through the SFI Forest Partners Program®.<sup>40,41</sup> SFI is also involved in environmental education through Project Learning Tree (PLT),<sup>42</sup> a green job growth program through a partnership with the Canadian government,<sup>43</sup> and promotion of the use of wood in the built environment.<sup>44</sup>

### Three Trends to Watch

Given the significant number of initiatives underway within forest certification programs today, it is clear the pace of change is not slowing down. However, there are patterns and leading trends worth watching, including the three described below.

#### *Risk Assessments as a Targeting Tool - and Potential Foothold for Harmonization?*

A growing trend in recent years has been the use of risk assessments in supply chains. Taking various forms and used for varying purposes, risk assessments provide a mechanism to evaluate the overall supply chain exposure related to a sourcing region. One example of a global approach is the Sourcing Hub that provides a Timber Risk Score.<sup>45</sup> This evaluation focuses on the risk of illegality within supply chains while other systems also evaluate additional ecological and social issues of concern. Each major forest certification program has adopted what can be characterized as a risk assessment approach.<sup>46, 47</sup> Through these approaches, potential risks in a supply chain can be identified and either avoided or addressed. Deeper insights into the challenges and needs within sourcing regions allow companies,

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<sup>32</sup> <https://fsc.org/en/newsfeed/new-smallholder-access-program-an-innovative-approach-to-forest-certification>

<sup>33</sup> <https://us.fsc.org/en-us/newsroom/newsletter/id/1115>

<sup>34</sup> <https://us.fsc.org/en-us/newsroom/newsletter/id/1130>

<sup>35</sup> <https://us.fsc.org/en-us/newsroom/newsletter/id/1168>

<sup>36</sup> <https://us.fsc.org/en-us/newsroom/newsletter/id/1158>

<sup>37</sup> <https://www.buildwithfsc.com/>

<sup>38</sup> [https://www.forests.org/wp-content/uploads/SFISummaryExternal\\_Oct2019.pdf](https://www.forests.org/wp-content/uploads/SFISummaryExternal_Oct2019.pdf)

<sup>39</sup> <https://www.forests.org/sfi-standard-revision-process/>

<sup>40</sup> <https://www.forests.org/the-yakama-nation-wins-award/>

<sup>41</sup> <https://www.forests.org/sfi-forest-partners-program-and-american-tree-farm-system/>

<sup>42</sup> <https://www.forests.org/plt/>

<sup>43</sup> <https://pltcanada.org/en/green-jobs/>

<sup>44</sup> <https://www.forests.org/better-building-solutions/>

<sup>45</sup> <https://preferredbynature.org/sourcinghub/timber>

<sup>46</sup> FSC, *Controlled Wood*; PEFC, *Due Diligence System*; SFI, *Fiber Sourcing*

<sup>47</sup> Additional models to consider: *Sustainable Biomass Program* (SBP), *Regional Risk Assessments*; *Dutch Sustainability Criteria for Solid Biomass*, *Risk Based Approach*; *Enviva*, *Track and Trace*®; *Drax*, *Catchment Area Analysis*.

stakeholders, and affected parties to target their mitigation efforts.<sup>48</sup> To ensure there is more benefit than cost to these innovations going forward, it is recommended that harmonization be pursued between the risk assessment approaches. Mutual recognition of risk assessment procedures, forest management standards, and/or chain-of-custody systems would go a long way in reducing the existing redundancies and inefficiencies, including the pressure to double-certify. A starting point for this is in the marketplace with private and public influencers embracing a program neutral stance or at least a ranked choice approach rather than program exclusion. The greatest growth in certification has occurred when the marketplace has chosen to be inclusive of the various approaches.<sup>49</sup>

#### *Data Analysis as Part of a Growth and Impact Strategy*

In the early days of forest certification, about the only data the programs needed to report each year was the growth in certified acres. The impressive trends along with the growth in participating members and countries and expansive numbers of chain-of-custody certificates were enough to demonstrate success and impact. Today, the situation has changed. Not only is the rate of growth no longer sufficient to demonstrate progress for most programs, but stakeholders, investors, partners, and supply chain actors are looking for much greater insight into the conservation outcomes and social impacts of certification. Each forest certification program has launched innovations in data management and made commitments to further transparency.<sup>50</sup> The WoodsCamp<sup>51</sup> tool provided by the American Forest Foundation (AFF)<sup>52</sup> is a noteworthy model of using data and technology within a growth and engagement strategy. It leverages the organization's insights into certification and family forest engagement through a personalized approach that is extremely efficient (i.e., users select their property, answer five questions, and get a customized report). While forest certification programs have been gradually embracing technology, other innovators have emerged and arguably eclipsed their efforts.<sup>53</sup> Using technology to do things better, and to work with data differently than in the past, will be key to expanding the impact of certification programs and conservation efforts.

#### *Partnerships for Policy and Procurement*

In 2011, Dovetail anticipated the next major influencers on forest certification programs would be governmental interests. The role of government has been made increasingly clear in the forest sector through policies related to

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<sup>48</sup> Arguably, forest certification could be further along today if it had started with a risk assessment approach and targeted areas of greatest need while appropriately reducing the level of scrutiny in low-risk regions (i.e., more efficient distribution of resources). This approach was suggested during the formative years of certification, for example the Montreal Process beginning in 1994 included focusing the initial evaluation on the country level, for further discussion, [click here](#).

<sup>49</sup> An example of this was when Time, Inc. and other large customers made commitments to increase the use of certified paper, including recognition of all the major forest certification programs. With a deadline of December 31, 2005, the major paper supplying regions of the US saw a rash of certification activity with 13 FSC forest management certificates issued that year representing 11.4 million acres. On the SFI side, the growth of certification within the printing sector was demonstrated by the fact that of the 807 SFI chain-of-custody certificates issued at the time, 65 % (526) were printers. <https://dovetailinc.org/upload/tmp/1581778990.pdf>

<sup>50</sup> Publicly available examples include: FSC, [GIS Map \(https://fsc.org/en/certified-forests\)](https://fsc.org/en/certified-forests); PEFC [Online Platform](#); SFI, [GIS Map \(https://www.forests.org/forestmanagementstandard/\)](https://www.forests.org/forestmanagementstandard/)

<sup>51</sup> WoodsCamp is an internet tool that helps private woodland owners in the United States connect with programs, services, and professionals to help them care for their land. <https://woodscamp.com/>

<sup>52</sup> AFF is the parent organization for ATFS

<sup>53</sup> Examples include: Global Forest Watch (<https://www.globalforestwatch.org/>), FAO Global Forest Resource Assessment (<http://www.fao.org/forest-resources-assessment/2020/en/>), The State of America's Forests (<https://usaforests.org/>), Silviaterra (<https://www.silviaterra.com/basemap>)

illegal logging and trade (i.e., Lacey Act<sup>54</sup>, EUTR<sup>55</sup>), adoption of building code changes to support tall wood buildings and use of mass timber,<sup>56</sup> and commitments to planting a trillion trees.<sup>57</sup> Concurrently, the role of the private sector - participants in trade, manufacturers of building materials, and the labor force for forest restoration - has remained essential. To realize effective gains, there are opportunities for greater public-private-partnerships. A key step in this process is having clarity of purpose within the forest sector for what success looks like and being able to think and act big. A recent example of creating this kind of clarity is the Policy Platform put forth by the Forest Climate Working Group.<sup>58</sup> The work of the North American Forest Partnership (NAFP) through #forestproud has also been instrumental in engaging new audiences and increasing positive perceptions of the sector.<sup>59</sup> These types of collaborative efforts are essential for articulating the positions of diverse interests and charting a constructive approach with a higher likelihood of success. Forest certification programs potentially have significant value to add given the detailed information available within their auditing processes and the relationships they have with private interests throughout the sector. However, certificate holders are reluctant to provide permissions to release information, and relationships with some governmental interests are not as well developed as they could be.

Forest sectors in high-income countries also need to continue looking beyond their respective domestic issues to consider international trade conditions and advocate for cross-sectoral solutions to land use change and deforestation trends. In conservation conversations today, there is interest in landscape-scale evaluations and solutions. This situation further highlights the need for partnerships to reach critical mass. One area of recent innovation has been the development of standards that are specific to recognizing forest restoration activities.<sup>60</sup>

## Conclusion

As in any aspect of forest management, collaboration between multiple parties is often crucial; this same consideration applies to forest certification. Certification acts as a proof of sustainability, and the definition of sustainability is a common purpose across programs. The on-going level of competition within forest certification programs has resulted in less strategic efforts such as retention over recruitment and missed opportunities for collaboration and partnership that would have greater influence on forest sustainability overall. New and better systems of risk assessment, data analysis, and policy advocacy are out-pacing forest certification growth and innovation. To stay relevant, forest certification programs are going to have to double-down on their stated commitments to innovation, partnerships, and ambitious targets, and they need to make new friends in order to reach the scale of impact that is needed.

The success of forest certification is apparent in positive growth trends over the past two decades. However, evolution is needed to support improved impact and measurable outcomes. Competition between certification programs can be beneficial, but it should be occurring in ways that make a meaningful difference in addressing drivers of deforestation, creating economic growth and employment opportunities, and supporting more equitable access to

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<sup>54</sup> The 2008 amendment to the Lacey Act made the US the first country to ban the import and sale of illegal timber and plant products. For more information: <https://dovetailinc.org/portfoliodetail.php?id=5e2f101f1142f>

<sup>55</sup> In the European Union (EU), the 2003 Forest Law Enforcement, Governance and Trade (FLEGT) Action Plan, coupled with the EU Timber Regulation (EUTR) in 2013 sought to ensure EU imports of timber were legal. For more information: <https://dovetailinc.org/portfoliodetail.php?id=5e260b333c589>

<sup>56</sup> <https://awc.org/pdf/education/des/AWC-DES607A-TallWood2021IBC-190619-color.pdf>

<sup>57</sup> <https://www.1t.org/>

<sup>58</sup> <https://forestclimateworkinggroup.org/resource/forest-climate-working-group-policy-platform-for-116th-congress/>

<sup>59</sup> <https://forestproud.org/>

<sup>60</sup> For example: [Forest Ecosystem Restoration Standard](#) (Preferred by Nature, formerly NEPCo) and [Source Verified Good Wood](#)

natural resources. Instead, marketplace behaviors have led to the expansion of double-certification and other inefficiencies. A starting place for arresting this trend is with supply chain influencers embracing a program neutral stance or at least a ranked choice approach and allowing for alternatives rather than program exclusion.

The world gives little thought to how much forestland or wood is certified. To the extent governments, companies, conservation organizations, and others are paying attention, the questions are more along the lines of: *are forests being sustainably managed?* and *how can we responsibly source products from forests?* Certification has been able to serve as a proxy for the answers, especially as it experienced strong growth and seemed like a silver bullet solution. But the limitations of forest certification as the single answer to the diverse drivers of land use change have become increasingly clear. As a result, the past decade has seen steady growth of private and public sector alternative approaches manifested within supply chains, technology innovations, and government policies. To some degree, each of these developments pose a threat to the future of forest certification. However, this growing interest and innovation also presents the opportunity to revisit the original questions and recommit to identifying collaborative ways of securing the future of forests and forest products.

There is growing recognition that forests can be at the center of a circular bioeconomy, the structure for a healthy and more equitable built environment, and the source of global natural climate solutions. These opportunities are much bigger than the tools and solutions offered by forest certification, and they will require massive cooperation and significantly greater resources. To realize this potential for forests and forest products, relevant organizations must know how to work together to build alliances and reduce friction.

*Special thanks to Dovetail research interns Anna Stockstad and Phuong Nguyen*

## Appendix

**Table A-1. FSC and PEFC National Offices/Members**

Note: Not all countries are included in the table. Only countries that have FSC and/or PEFC offices are listed.

Continent	Country	FSC Regional and Sub-Regional Offices	PEFC National Members
<b>Africa</b>			
	Cameroon		X
	Republic of Congo	X	X
	Gabon	X	X
	Ghana		X
	Kenya	X	
	South Africa	X	X
	Uganda	X	
<b>Asia</b>			
	China	X	X
	India	X	X
	Indonesia	X	X
	Japan	X	X
	South Korea	X	X
	Malaysia	X	X
	Myanmar		X
	Thailand	X	X
	Viet Nam	X	X
<b>Europe</b>			
	Austria		X
	Belarus	X	X
	Belgium	X	X
	Bosnia and Herzegovina		X
	Bulgaria		X
	Czech Republic	X	X
	Denmark	X	X
	Estonia	X	X
	Finland	X	X
	France	X	X
	Germany	X	X
	Hungary		X
	Ireland		X
	Italy	X	X
	Latvia	X	X
	Lithuania	X	X
	Luxembourg	X	X
	Republic of North Macedonia		X
	Netherlands	X	X
	Norway		X



	Poland	X	X
	Portugal	X	X
	Romania		X
	Russian Federation	X	X
	Slovakia		X
	Slovenia		X
	Spain	X	X
	Sweden	X	X
	Switzerland	X	X
	Turkey		X
	Ukraine	X	X
	United Kingdom	X	X
<b>North America</b>			
	Canada	X	X
	United States	X	X
<b>Oceania</b>			
	Australia	X	X
	New Zealand	X	X
<b>Latin America</b>			
	Argentina	X	X
	Bolivia	X	
	Brazil	X	X
	Chile	X	X
	Ecuador	X	
	Guatemala	X	
	Guyana		X
	Honduras	X	
	Mexico	X	
	Nicaragua	X	
	Peru	X	
	Uruguay		X
<b>Total</b>		<b>49</b>	<b>55</b>

Information compiled by Dovetail Partners, December 2020