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MASTER OF SUSTAINABLE REAL ESTATE DEVELOPMENT

Current Real Estate Development Industry Usage of Sustainable Forestry Products in the Southeast

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Executive Summary

Across an increasing number of industries, a "certification revolution" is taking place, driving industries to become more socially and environmentally responsible. In part, this revolution is being driven by independent, non-governmental organizations (NGO's) whose label can be recognized in the market place, which in turn drives a premium for sustainably produced materials. The timber industry is no exception, as the NGO Forest Stewardship Council (FSC) has created a certification system that requires the certification holder to account for its environmental and social impacts.

Implemented in 1994, the FSC has now issued certifications in over 79 countries, totaling 370,287,137 acres of certified area. In 2002, the Alexandria, Louisiana based company RoyOMartin became the first to FSC certify a Louisiana forest. Their certification covered approximately 500,000 acres of forests in over thirty Louisiana parishes. With an unquestionable commitment to sustainability, RoyOMartin is interested in the end user statistics of these ethically produced products and, more specifically, what is driving the demand for FSC labeled products.

To diagnose the market for sustainable forestry products, a survey was sent to 667 industry professionals. After receiving 95 survey responses (14% response rate), interesting patterns emerged, indicating future trends for not just FSC labeled products but sustainability as a whole.

Research findings:

- The youngest age group (20-35 Years) is more concerned with responsible environmental practices, as they are more likely to be LEED accredited, select sustainable building materials, and specify FSC products. For example, the youngest age group (20-35 Years) had a 69% LEED Accredited response rate, compared to the 37% LEED Accredited response rate from the oldest age group (51 Years and older).
- Industry professionals practicing outside of the southeast are more likely to incorporate environmentally sensitive practices, as opposed to industry professionals practicing exclusively in the southeast. In this study, 77% of the industry professionals practicing outside the southeast reported previously specifying FSC wood products, while only

48% of the industry professionals practicing solely within the southeast reported previously specifying FSC wood products.

- Industry professionals practicing within the southeast have a much higher perception of cost premiums for sustainably produced products than those practicing outside the southeast.

While on the one hand, it is disconcerting that, based on this research, the southeast appears to be lagging behind other regions in incorporating sustainable measures in the building process, this study does suggest there will be increasing future demand for sustainably produced materials, as the younger age group becomes more established in the industry. The primary research further demonstrates the potential for increased future demand for sustainable products is especially prevalent in the southeast, as the data reveals the southeast industry is lagging behind other regions in adapting sustainable practices. If this is the case, demand for FSC certified products will steadily increase at a faster rate in Louisiana and the southeast, compared to other regions in the country.

Table of Contents

Prologue **1**
Introduction **2**
Background to Forest Stewardship Council **2**
Clear Cutting: A Traditional Timber Harvesting Method 2
Forest Stewardship Council History 4
FSC Taking the Triple Bottom Line to the Timber Industry 6
FSC Certification Process **7**
RoyOMartin History **12**
Other Sustainable Forestry Certifications **13**
Discussion of Survey Findings **15**
Methods 15
Survey Respondent Demographics 16
Overall Survey Statistics 16
Statistics Based On Age 18
Statistics Based on Geography of Practice 19
Conclusion **21**
Appendices **23**
Appendix A: Sustainable Forestry Product Survey 23
Appendix B: Survey Statistics 29
Appendix C: RoyOMartin Timeline 37

List of Figures

Figure 1: FSC Panel Product Projects 18
Figure 2: LEED Accredited Respondents 19
Figure 3: Reported Experience of Cost Premiums 20
Figure 4: LEED Accredited Respondents by Geography 20

Prologue

My background in accounting impressed upon me the lesson "cash is king" as I learned how to calculate cash flows, IRR's, and NOI statements during my undergraduate coursework. At the time, I thought the bottom line of any business venture was financial profit. Several years later, as I started a Master of Sustainable Real Estate Development program, I heard the phrase "triple bottom line" repeated often. The triple bottom line approach analyzes a business venture in terms of people, planet, and profit, taking a more holistic approach by also weighing the environmental and social impacts of a business endeavor, instead of solely the financial return.

While I was extremely skeptical that the "triple bottom line" was only used inside of classrooms, I did recognize the increasing popularity of sustainability, which gave legitimacy to this new approach to business, in my mind. According to economist and Senior Research Scholar at Yale University's School of Forestry and Environmental Studies Michael Conroy, there is an increasing demand for ethically-certified products in an increasing number of industries. The growing demand has, in part, been created by non-government organizations (NGO's) whose certification systems verify compliance against a predetermined benchmark. In theory, society places a value upon this third party verification and will pay a higher premium for the endorsed product. In turn, this "certification revolution" has incentivized corporations to become more socially and environmentally conscious.

While cash may still be king, it appears market forces are driving organizations to account for social and environmental measures as well. What follows is an in-depth analysis of the NGO Forest Stewardship Council (FSC) and an analysis of the end user of FSC products, determined by a survey sent to 667 industry professionals.[1]

[1] Michael Conroy, *Branded! How the Certification Revolution is Transforming Global Corporations* (Gabriloa Island, BC: New Society Publishers, 2007).

Introduction

The Forest Stewardship Council was established following the 1992 United Nations Conference on Sustainable Development. A decade later, lumber company RoyOMartin FSC certified the first forest in Louisiana, covering 482,188 acres in over thirty Louisiana parishes.[2] With FSC's increasing market presence, RoyOMartin is interested in the end user of these products and specifically, what is driving the demand for these sustainably produced materials. The objectives of this research project are to 1) analyze the FSC history, certification process, and impact on the triple bottom line; and 2) determine which industry professionals are using FSC products and why they choose to do so. Based on a survey completed by 95 industry professionals, the results will be analyzed to determine end user statistics, specifically focusing on age of industry professionals and geography of their practices.

Background to Forest Stewardship Council

Clear Cutting: A Traditional Timber Harvesting Method

Human activity, particularly in the areas of agriculture and urbanization, poses a serious threat to biological diversity. According to Manuel C. Molles' textbook *Ecology,* "human activities… have significantly altered one-third to one-half of the ice-free land surface of the earth." From practices such as marshes being drained to build airports and subdivisions, tropical forests being converted to non-forest uses, and the courses of rivers being altered, there is a need to protect the remaining land cover. Molles claims, "the majority of old-growth temperate forests in northwestern North America has been cut, and the remaining old-growth forests are threatened by deforestation."[3] Since the majority of our North American forests have been altered, the need to manage the remaining forests in a sustainable way has never been greater. When considering forest management, timber harvesting methods merit a closer look, as traditional timber harvesting methods have historically been "economically expedient but ecologically shortsighted."[4] One such method, prevalent in the Southeastern United States, is clear cutting.

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[2] *FSC Newsletter,* Late May 2002. www.fscus.org/news/index. 15 March 2012.
[3] Manuel C. Molles Jr., *Ecology: Concepts and Applications.* Boston: Mcgrawhill, 2008, 540.
[4] Thomas R. Vale, "Clearcut Logging, Vegetation Dynamics, and Human Wisdom," *Geological Review,* Vol. 78 No 4 (Oct 1998): 375-386.

Clear cutting is the method of cutting every tree on a given tract and if unregulated, will produce major adverse ecological changes. While this practice has a controversial past, "if properly applied, it is a widely accepted forest management practice."[5] According to Louisiana State University Silviculturalist Thomas Dean, both industrial and nonindustrial forest owners in the South use clear cutting as the dominant form of harvesting timber.[6] It is not difficult to understand the rationale behind the popularity of clear cutting, as this method provides the "greatest dollar return or unit output."[7] Although unregulated clear cutting may provide the best immediate financial return for the land owner, damaging environmental impacts result from this method.

One obvious environmental impact is the loss of wildlife habitat. With the complete deforestation of tracts of land with clear cutting, additional stress is added to a presumably balanced ecosystem. While some animals thrive in areas dominated by the edges created from a clear cut, the clear cut area undoubtedly alters the overall balance of a natural ecosystem where wildlife depends on shade tree habitats. In the Pacific Northwest, the Northern spotted owl is an example of a bird that has been adversely impacted by clear cutting, as the owl's habitat requires large swaths of undisturbed forest.[8] Cutting large tracts of land also impacts the reptile and amphibian population. This is evident in a study done on salamanders in the Eastern United States. According to Biologist James Petranka, a study in the Southern Appalachians proved salamander populations are almost completely eliminated during the following two years of a clear cut. The study further showed that salamander populations in the eastern United States would take 30-60 years to recover from the impact caused by clear cutting.[9]

Along with the wildlife impacts, clear cutting affects nearby streams. In a study of the Hubbard Brook Experimental Forest in the White Mountains of New Hampshire, when the annual stream-flow was measured after cutting, a 39% increase was estimated in the first year following the cut and a 28% increase was estimated for the second year. Along with the increased stream-flow, the gross export of dissolved solids increased 6 to 8 times over what an undisturbed watershed would be expected to export. The stream water temperature was also

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[5] J. Hammer, *Forest Policy.* Editorial research reports 1975 (Vol. II). Washington, DC: CQ Press. http://library.cqpress.com/cqresearcher/cqresrre1975112800. (18 March 2012).
[6] Thomas Dean, interview by Stephen Strohschein. 13 March 2012.
[7] J. Hammer.
[8] Hammer
[9] James W. Petranka, "Recovery of Salamanders after Clearcutting in the Southern Appalachians: A Critique of Ash's Estimates." *Conservation Biology* 13, No. 1 (February 1999): 203.

found have increased for both the summer and winter, exhibiting greater temperature volatility during the day as well.[10] Yet another effect on the streams is the potential for increased turbidity as "erosion and transport of particulate matter may be accelerated."[11]

The diversity of age and species of trees within the forest are unnaturally impacted by clear cutting. Following a clear cut, primary succession tree species are the first to naturally be regenerated. This produces a forest that is composed of an even aged stand. A study on the Appalachian herbaceous understories compared 9 areas of old growth with 9 areas of secondary forest and their accompanying herbaceous understories. The 9 secondary growth areas ranged from 45-87 years following the clear cut. The results of the study revealed that neither the cover nor richness increased with age in the secondary forests. The study suggests two possible explanations: the recovery period is very slow and longer than the 45-87 year timeframe or, due to changing climatic conditions, clear cut forests will never recover to their primary forest state.[12] In essence, the natural diversity of timber age and species is destroyed by clear cutting and will take many years, if ever, to recover to the natural state.

Given the adverse environmental impact caused by clear cutting and the increasing emphasis on ethically-certified products, it is necessary to consider alternative timber harvesting practices. As Thomas Vale, geography professor at the University of Wisconsin, notes, "A crucial question about the wisdom of clearcut logging thus becomes not only whether such logging is ecologically acceptable but also whether it is consistent with the diverse purposes of American society."[13] As an alternative to detrimental logging practices, several third party certification organizations have formed to set standards by which harvesting practices can be sustainably measured. One of the most prominent of these is the Forest Stewardship Council.

Forest Stewardship Council History

Following the United Nations Conference on Sustainable Development in 1992, an effort was made to provide a system designed to improve forest management worldwide. This effort was spearheaded by a coalition of environmental groups, grassroots social organizations, and

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[10] Gene E. Likens et al., "Effects of Forest Cutting and Herbicide Treatment on Nutrient Budgets in the Hubbard Brook Watershed-Ecosystem." *Ecological Monographs* 40, No. 1 (July 1969): 24.
[11] Gene E. Likens et al. "Recovery of a Deforested Ecosystem." *Science* 199 (February 1978): 492.
[12] D.C. Duffy and F. Kraus, "Do Appalachian herbaceous understories ever recover from clearcutting?" *Conservation Biology* 6 (1992): 196-201.
[13] Vale, 386.

industry representatives. The result was the Forest Stewardship Council (FSC), implemented in 1994. Since 1994, FSC certifications have been issued in over 79 countries, having a total of 149,849,888 hectares of certified area.[14]

Based in Bonn, Germany, FSC is an independent, not for profit, non-government organization, with a mission to "promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests."[15] With a mission statement like this, FSC truly takes the triple bottom line approach in its certification process. In fact, FSC has developed a set of 10 principles that is the basis for all FSC forest management standards, deliberately focusing on social, economic, ecological, cultural, and spiritual needs of present and future generations.[16] To ensure independent and credible certification, FSC does not act as a certifier itself but relies on privately run certifying organizations to confirm that the strict forest managing standards are being met by those parties who wish to become certified or keep their certification current. While FSC is not responsible for certifying, FSC does accredit, evaluate, and monitor certifying organizations.[17]

A market study conducted by FSC in 2010 helps outline some statistics on the end users of the FSC label. According to FSC, this survey was sent out in 13 different languages, receiving responses from over 3,500 companies in 29 countries. The survey showed that over 50% of the FSC certification holders are in the paper industry, focusing on print or publishing services. Of the businesses surveyed, over 50% of the certified businesses were smaller companies, comprised of less than 50 employees.[18] A more recent poll, March 2012, shows that 83.89% of the FSC certified forest area comes from North America and Europe, while the remaining 16.11% of FSC certified forests can be found in South America, Africa, Asia, and other Oceania countries.[19] With a reach as wide as FSC claims to have, it is not surprising their organization professes to be "the largest, oldest, strongest, and most visible system ever devised for linking responsible forestry to markets."[20]

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[14] "Global FSC certificates: type and distribution ." Forest Stewardship Council: March 2012.
[15] "Our Vision and Mission ." Forest Stewardship Council. http://www.fsc.org/vision_mission.html 15 March 2012.
[16] "FSC International Standard." Forest Stewardship Council. 1996.
[17] "New Council makes the Search for Wood Easier ." *Strad* 106, No. 1265 (Sep 1995): 865, http://ehis.ebscohost.comlibzp.lib.lsu.edu (14 March 2012).
[18] "FSC Business value and growth ." Forest Stewardship Council. Market Survey 2010.
[19] "Global FSC certificates ."
[20] "Fact Sheet ." Forest Stewardship Council 1996.

FSC Taking the Triple Bottom Line to the Timber Industry

FSC's mission is to "promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests."[21] Through FSC's 10 Principles and Criteria, managerial aspects, environmental and social standards, and other requirements are detailed to ensure their certification adheres to their overall mission. A closer look at how the FSC certification affects the people, planet, and profit follows.

People

FSC strives to promote forest management plans that are socially beneficial, gaining the recognition and support in the community. According to FSC, their "unique, democratic, and transparent structure prioritizes access and benefits to small and community producers, recognition and respect of indigenous rights, endorsement of the rights of forest workers, and effective stakeholder consultation."[22] For example, FSC has aided the Sami people and their traditional livelihood of reindeer herding. In northwestern Sweden, many of the Sami people depend on reindeer herding to support their livelihood. Having customary rights to graze their reindeer in the forests, some Sami have encountered grazing rights disputes with private forest owners. According to Olof Johansson, reindeer herder, none of the grazing rights disputes have been with FSC certified forest owners, as the FSC certification requires the recognition and respect of indigenous people's rights. Johansson further credits FSC for the standard of stipulating consultation with the local Sami community before a logging operation is planned. Johansson claims these consultations have led to saving more trees, which helps produce more lichens for the reindeer to eat.[23]

Planet

FSC certification is acclaimed "environmentally appropriate," for ensuring that the harvest of timber and non-timber products maintains the forest's biodiversity, productivity, and ecological processes. Seen in practice, FSC certified forests in the Maya Biosphere Reserve in Guatemala are saved at a rate of 20 times greater than non-certified protected forest areas. Two

[21] "FSC user-friendly guide to FSC certification for smallholders ." Forest Stewardship Council. FSC Technical Series No. 2009-T003.
[22] "FSC Certification and Social Issues ." Forest Stewardship Council. December 2010.
[23] "FSC user friendly guide to FSC ."

notable environmental benefits from the FSC certification system include the protection of rare, threatened, and endangered species and the establishment of management plans for forest products of commercial importance. Another example of FSC's environmental impacts can be seen in Acre, Brazil. Many families in Acre depend on fishing and hunting to provide a source of protein but prior to becoming FSC certified, there was no monitoring of the hunting and fishing levels in the forests. After Acre forests become certified, a "hunting calendar" was established, helping the community to record game harvesting data. Community members are now monitoring the impact of hunting and are better able to address wild game issues as they arise.[24]

Profit

With the additional certification cost of becoming FSC certified and the forgone profit not being realized from more environmentally sound forestry practices, the FSC label must derive a premium on the market place if FSC hopes to gain market share. A Rainforest Alliance report analyzed the Pennsylvania State Forest timber sales from 2001-2006 to determine if there were economic benefits from the FSC certification. The report revealed that the FSC-certified buyers of the state forest timber sale paid approximately $7.7 million more than would have been paid if the buyers would have been non-certified. The additional $7.7 million equated to approximately 10% higher revenues than would have been received without the certification.[25]

FSC Certification Process

The FSC certification process is completely voluntary but timber companies who attain the FSC certification publicly show that their company's practices comply with the highest social and environmental standards in the timber industry. Essentially, the FSC label helps brand companies as responsible, while providing them access to environmentally sensitive markets. As previously mentioned, FSC oversees the auditing standards but relies on independent accreditation from certification bodies. Based on the type of certification– Forest Management, Chain of Custody, or Controlled Wood– and the geography, different certification bodies are available to provide FSC certificates. According to FSC, for obtaining any certification, the steps

[24] "FSC user friendly guide to FSC ."
[25] Terrence Bensel et al., "Are There Economic Benefits from FSC Certification? An analysis of Pennsylvania State Forest Timber Sales ." Rainforest Alliance (8 April 2008). Permission to quote granted to author on 10 May 2012.

are the same: contact FSC accredited certification bodies, choose one certification body to work with, certification audit is conducted, audit report is issued, FSC certification is received or further instructions are given to help the client get in compliance and gain the certification. FSC certifications are valid for a period of five years but an annual surveillance audit will take place to ensure compliance is being maintained with the FSC requirements.[26]

One of the largest FSC certifiers is The Rainforest Alliance, with over 20 years of certification experience in over 70 countries. The Rainforest Alliance was one of the founders of the FSC and has now "certified the greatest number of community and indigenous operations to FSC standards."[27] While some certification bodies are restricted to certification types or geographies, The Rainforest Alliance can issue Forest Management, Controlled Wood, and Chain of Custody certifications worldwide. On the other hand, certifier PricewaterhouseCoopers LLP can only issue Chain of Custody certification for Canada and United States.[28] Regardless of the certifier, all FSC Forest Management certification reports are available to the public, providing complete transparency throughout the entire certification process.[29]

According to The Rainforest Alliance, certification costs vary considerably. The total certification cost depends on the auditor's time for the on-site evaluation, reports, and travel cost. These factors will vary greatly with the complexity and scope of the audit and the businesses location. Since certification costs are project specific, The Rainforest Alliance provides a budget proposal for potential clients once they have completed an application.[30] An in depth look into both Chain of Custody, Forest Management and Controlled Wood certifications follows.

Chain of Custody (CoC) Certification

The FSC Chain-of-Custody (CoC) certification tracks the FSC certified material through the entire production process, until the final product is packaged and delivered to the store. This certification assures the end user that the wood product came from a sustainably managed forest. Before an FSC-certified product is manufactured or a retailer is able to make a claim that a product is FSC-certified, the product must first be FSC CoC certified. Typical candidates for CoC certification include sawmills, secondary manufacturers, timber brokers, wholesalers,

[26] "FSC International Standard ."
[27] Rainforest Alliance. www.rainforest-allaince.org/forestry 20 March 2012
[28] Accreditation Services International, www.accreditation–services.com/archives/standards/fsc . 24 March 2012.
[29] Rainforest Alliance.
[30] Rainforest Alliance.

retailers, and paper merchants. According to The Rainforest Alliance, "Products made from FSC CoC operations include lumber, paper, flooring, musical instruments and non-timber forest products such as maple syrup and Brazil nuts."[31]

Based on a March 2012 Report, "Global FSC certificates: type and distribution", there have been 22,466 FSC Chain-of-Custody certificates issued in 105 countries. Europe has received the most CoC certificates, totaling 11,287. Asia and North America follow with 4,789 and 4,713 CoC certificates issued respectively.[32] With such a far reach, there is no doubt FSC impacts forests throughout the world.

In order to help reduce auditing costs associated with CoC certification, both Multi-Site Certification and Group Certification are available. Companies who operate several facilities are allowed a multi-site certification, allowing the different facilities to be managed under one certificate. For smaller, independent operations, a group certification is offered. Under this certification, a group of smaller operations are allowed to join together under a common association and designate a "Group Manager" to oversee the Group Certificate.[33]

To address the issue of non-FSC materials being mixed with FSC-certified materials, several different FSC labels exist. Products that are made entirely from materials from FSC-certified forests are given the FSC Pure claim and the FSC 100 percent label. For products made with a combination of FSC-certified and non-FSC inputs, an FSC Mixed label is applied. For all FSC mixed products, the percentage or credit claim must be included on the invoice, allowing the end user to know the correct proportion of FSC materials that went into the final product. A third FSC label that is available is the FSC recycled label. This label is reserved for products containing reclaimed inputs, which can be a combination of post-consumer inputs and pre-consumer inputs.[34]

[31] Rainforest Alliance.
[32] "Global FSC Certificates ."
[33] "FSC User Friendly Guide to FSC ."
[34] "FSC User Friendly Guide to FSC ."

Forest Management (FM) Certification

FSC offers Forest Management (FM) certification to operations involved in growing and harvesting trees, in order to help protect forests from destructive logging practices.[35] The certification process is similar to CoC certification, as independent certification bodies are charged with accrediting the forests. While the certification process is similar to CoC certification, the typical candidates for FM certification differ, as the typical companies pursuing FM certifications include forest companies, government forestry agencies, mid-sized forest managers, indigenous peoples and groups of small landowners.[36] Before FSC labeled forest products can be traded from the FM certified forest, the forest manager or owner must also obtain FSC CoC certification.

Similar to CoC certification, FM certification insures that the ten FSC global principles are met. Several key environmental issues that FM certification addresses are issues such as "minimizing clear-cuts, striving to eliminate pesticide use, and the protection of forests with high conservation value (ones that contain rare and endangered species)."[37] An example of a general plan for FM certification, from the FM public summary for Tembec Industries Inc., includes, among others:

- A description of the territory, its socio-economic conditions, and sectors to protect;
- An evaluation of sustained yield AAC (Annual Allowable Cut);
- The forest management strategy for 25 years to meet the determined yields and objectives;
- Prevention and possible suppression measures to minimize insect and disease impacts.[38]

Unlike CoC, FM certification standards are more heavily influenced by the particular forest's region. To ensure that FSC's ten global principles are applied properly, regional standards have been created for different forest types: tropical, temperate, and boreal. The

[35] "Good Wood: How Forest Certification Helps the Environment ." Natural Resources Defense Council. http://www.nrdc.org/land/forests/cqcert.asp . 25 March 2012.
[36] "Rainforest Alliance ."
[37] "Responsible Forest Management ." Certified Wood Products Incorporated. http://www.certifiedwoodproducts.net. 25 March 2012.
[38] "Forest Management Public Summary for Tembec Industries." SmartWood Program of Rainforest-Alliance. (August 2005): 12.

regional standards are created by groups comprised of scientists, foresters, landowners, environmentalists, and other stakeholders.[39] One example of a standard that is heavily influenced by the region and forest type is the annual allowable cut (AAC). The AAC limits that total harvest volume a landowner is allowed to cut in a given year. The local forestry administration strictly controls the AAC , which must be established prior to FM certification implementation.[40]

There are several models of FM certification available to landowners: Group certification, Non-Timber Forest Products (NTFP), and Small and Low Intensity Managed Forests (SLIMF). The group certification is similar to the CoC group certification, allowing multiple parties to be certified under one certificate, lowering the certification cost per user. It is not uncommon that an individual landowner can join an existing group.[41] The Non-Timber Forest Products certification is available to landowners wishing to adopt sustainable forestry practices on their land. Typical Non-Timber Forest Products with relatively large markets include, palm hearts, rattan, spices, and some medical plants.[42]

The third model of FM certification is for small and low intensity managed forests (SLIMF). According to FSC, "A top priority for FSC is to ensure that it embraces smallholder forestry. Currently, smallholders collectively manage nearly one fifth (18%) of the total area globally certified to the FSC Principles and Criteria."[43] Financing the costs of becoming FSC certified can be challenging for smaller and less intensive operations, so FSC has created special rules for SLIMF eligible applicants, reducing the certification costs and streamlining the procedures for getting certified. To qualify as a "small forest", the forest management unit must be under 100 ha (exceptions do apply, listed in the SLIMF Addendum). For a forest to qualify as "low intensity managed," the forest must either be managed for the production of only NTFP's or the rate of harvesting timber is less than 20% of the mean annual increment within the total production forest area and the harvest from the total production forest area is less than

[39] "Rainforest-Alliance ."
[40] "Public Evaluation Report: FSC-Forest Management ." Institut fur Marktokologie. Prepared for Taizhou Wanfeng Forestry Company, Zhejiang. China. (21 May 2011).
[41] "Rainforest Alliance"
[42] Alan Pierce et al., "Certification of non-timber forest products: Limitations and implications of a market-based conservation tool" (paper presented at The International Conference on Rural Livelihoods, Forests and Biodiversity, Bonn, Germany, 19-23 May 2003).
[43] "FSC User Friendly Guide ."

5,000m3/year or the average harvest from the total production forest is less than 5,000 m3/year during the period of validity of the certification.[44]

Controlled Wood (CW) Certification

To aid in the additional supply of FSC material, the Controlled Wood (CW) certification is available. Under the certification, non-certified FSC material may be mixed with FSC certified material, resulting in a 'MIX' label. While non-certified FSC material is allowed to be mixed with FSC certified material, the non-certified portion must comply with the FSC Controlled Wood standards. For non-certified materials, CW standards state the material's origin must not be from one of the following places:

- Illegally harvested wood
- Wood harvested in violation of traditional and civil rights
- Wood harvested in forests in which High Conservation Values (areas particularly worthy of protection) are threatened through management activities
- Wood harvested from conversion of natural forests
- Wood harvested from areas where genetically modified trees are planted

Before the FSC mixed label is awarded, the non FSC certified products must be independently verified before they are mixed with the FSC certified material.

RoyOMartin History

Founded in 1923, Louisiana based company RoyOMartin is now one of the largest independently owned wood product companies in the southeast, with an unquestionable commitment to sustainability. Operating out of Alexandria, Louisiana, RoyOMartin owns tracts of land ranging in size from 20 acres to 10,000 acres, totaling approximately 600,000 acres, across Louisiana. According to an FSC Newsletter article from May 2002, RoyOMartin earned five credits from the FSC-accredited SmartWood program of the Rainforest Alliance. The certificates awarded covered 482,188 acres in over thirty Louisiana parishes and monumentally marked FSC's first certified forest in Louisiana.[45]

[44] "FSC User Friendly Guide ."
[45] *FSC Newsletter*.

The 2002 FSC Newsletter article also states that RoyOMartin is the first in the world to manufacture utility poles and Oriented Strand Board (OSB) with wood from FSC-certified forests. RoyOMartin's annual allowable cuts from their forests are as follows: 45 million board feet of pine sawtimber, 18 million board feet of hardwood timber, 810,000 tons of pine pulpwood, and 210,000 tons of hardwood pulpwood. With these AAC, RoyOMartin's mill annually produces 280 million feet of OSB. ROM also maintains a stock of 20,000 utility poles available to its customers for emergencies.[46]

According to RoyOMartin's FSC Chain of Custody certification coordinator Scott Bertrand, all of ROM FSC certifications have been provided through the Certifying Body Smartwood, the auditing entity for the Rainforest Alliance. While Bertrand acknowledges that the certification costs have varied throughout the years, he estimates on average the CoC audits cost between $3,000-3,500 annually per mill. For the combined FM/CoC audits and the FSC Annual Accreditation Fee, Bertrand estimates the annual cost to be between $20,000-$30,000. Additionally, Annual Accreditation Fees for each mill range from $1,500-$2,500 annually, although these costs fluctuate based on total sales volume and market conditions. Bertrand detailed a timeline establishing Roy O Martin's major FSC certification activities, from the original FSC certification in 2002 until the present (Appendix C).

Presently their FSC certified products include Oriented Strand Board, Pine Plywood, Lumber and Timbers, Landscape Timbers, and Poles and Piling.[47] Clearly, Roy O Martin incorporates environmentally conscious practices in every stage of their operations.

Other Sustainable Forestry Certifications

While this paper has focused entirely on FSC and its practices, it is important to note that there are several other recognized sustainable forestry labeling systems. In addition to FSC, other "green" wood labeling systems include Sustainable Forestry Initiative (SFI), American Tree Farm System (ATFS), Canadian Standards Association (CSA), and the European Programme for the Endorsement of Forest Certification schemes (PEFC). Currently, the two most recognizable forestry eco-labels are the Forest Stewardship Council (FSC) and the Sustainable Forestry Initiative (SFI). Although there is a current "market share battle" between these two labeling

[46] *FSC Newsletter.*
[47] RoyOMartin. http://royomartin.com. 11 March 2012.

systems, this paper is not meant to take sides in the debate, but rather to briefly discuss the situation and highlight the differences between the two organizations.

In 2000, the U.S. Green Building Council (USGBC) created the Leadership in Energy and Environmental Design (LEED) certification system. Since that time, the LEED system has become the preeminent green building standard in the US, presently having 9 billion square feet of LEED certified building space.[48] On the current LEED scorecard (the quantitative measure of a building's overall performance), one point out of 110 possible points is awarded under the "Materials and Resources" section for "certified wood." Today, the only certifying wood label LEED recognizes is the FSC label, which has created much controversy, as SFI aggressively lobbies for LEED recognition. According to FSC-US president Brinkema, the debate is "the single most controversial credit fight in LEED's nine-year history."[49] While LEED does not recognize the SFI label, according to the SFI, their label is recognized by many leading green building rating programs, such as the National Green Building Standard and the Green Building Assessment Protocol for Commercial Buildings.[50]

When analyzing both sustainable forestry labels, several major differences become apparent. One of the most obvious discrepancies between the two organizations is their origin. As previously stated, FSC was created in the wake of the United Nations Conference on Sustainable Development in 1992 by a coalition of "environmental groups, grassroots social organizations, and industry representatives."[51] On the other hand, SFI was established in 1995 by the trade group American Forest & Paper Association (AF&PA). The origin of SFI conception has led some critics to question the organization's true intentions, prompting the opposition to state SFI was created to "market US timber business-as-usual logging practices as being sustainable", going as far as calling the SFI certification "greenwashing."[52] Some of SFI's funding sources have also raised additional concern, as pulp and paper industry heavyweights International Paper, Georgia-Pacific Corporation, and Weyerhaeuser are among the list of funders.

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[48] United States Green Building Council. http://www.usgbc.org/ 13 March 2012.
[49] Christine MacDonald, "FSC Versus SFI ." 1998. http://www.architureweek.com/2009/0812/environment_1-3.html 22 March 2012.
[50] "SFI Program and Green Building ." http://www.sfiprogram.org/green_building/index.php. 1 April 2012.
[51] MacDonald.
[52] "FSC vs. SFI Forests ." Heart of Green. http://heartofgreen.typepad.com/heart_of_green/2008/05/fsc-vs-sfi.html. 1 April 2012

In addition to the two organizations' origins, there are notable differences between their certification standards. For example, certified FSC forests are not allowed to be converted into tree farms or other non-forest uses. On the other hand, SFI does not presently have such prevention in their certification standards. Another example illustrating their certifying standard differences is in their treatment of "high conservation value" tracks, or areas with high biodiversity. In accordance with FSC standards, forest managers of FSC certified forests are responsible for developing a plan for maintaining ecological functions within the forest; the plan must identify, map, and preserve these areas with high biodiversity. SFI, in contrast, calls for forest conservation but does not have concrete set-asides for preserving high conservation value tracks.[53] While there are many more differences between these organizations, the previously stated discrepancies aid in understanding the current debate LEED is facing.

Despite their differences, many environmentalists see room for improvement in both certifying organizations. According to a Senior Scientist at Consumers Union, Urvashi Ranagan, lumber industry executives contribute to both organizations' policies and rules for certification. In Ranagan's opinion, this undermines both organizations' credibility. Another criticism of both organizations is that neither certifying body is "calibrated to maintain carbon sequestration in certified forests." With respect to both organizations' similarities and differences, SFI President and CEO Kathy Abusow claims "such comparisons miss the big picture." According to Abusow, only 10% of the world's forests are certified and more attention should be focused on the remaining 90% of the world's uncertified forests.[54]

Discussion of Survey Findings

Methods

The following analysis is based off the responses of a web-based survey conducted from April 2, 2012 until April 10, 2012. The survey was sent to 667 industry professionals and received 95 completed responses, a 14.24% response rate (See Appendix A and B).

One area lacking in information is from the age group of individuals 66 years or older. Of the 95 completed surveys, only 3 surveys were completed by this age group. Another factor that may have influenced the data is the high response rate from sustainably minded individuals.

[53] MacDonald.
[54] MacDonald.

Since this survey was conducted as a "Sustainable Forestry Product Survey," it is believed more environmentally conscious professionals participated in the survey, as LEED accredited individuals accounted for 52.4% of the respondents.

Survey Respondent Demographics

The overwhelming majority (62%) of the respondents indicated working for an architectural firm. The other industry professionals that comprised the survey respondents were contractors (6%), engineers (4%), governmental workers (4%), consultants (4%), manufacturers (4%), real estate developers (1%) or firms vertically integrated with several of the professions.

Of the respondents, 42% of the firms surveyed have less than 25% of their practice in the southeast, while 45% of the firms surveyed have 75% or more of their practice in the southeast. Only 13% of the respondents reported 25%-75% of their practice being in the southeast. Only 11% of the respondents reported practicing 100% of their practice in Louisiana but 22% reported having 75% or more of their practice in Louisiana. Furthermore, 52% of the respondents reported having 25% or less of their practice in Louisiana and 15% of the respondents reported having 25%-75% of their practice in Louisiana.

The size of the firms varied considerably, with the largest sector (22%) of the firms comprised of 22-49 employees. Also, 21% of the firms surveyed reported having over 100 employees. Firms comprised of 10-19 employees accounted for 20% of the respondents. Sole practitioners (7%), 2-4 employed firms (11%), 5-9 employed firms (12%), and 50-99 employed firms (7%) also made up the survey respondents.

The age of respondents varied as well. Most of the respondents were between the ages of 51-65 years (39%), followed closely by respondents 36-50 years (38%), then ages 20-35 (19%), with only 4% of the respondents being 66 years of age or older. Of these respondents, 52% reported being LEED accredited.

Overall Survey Statistics

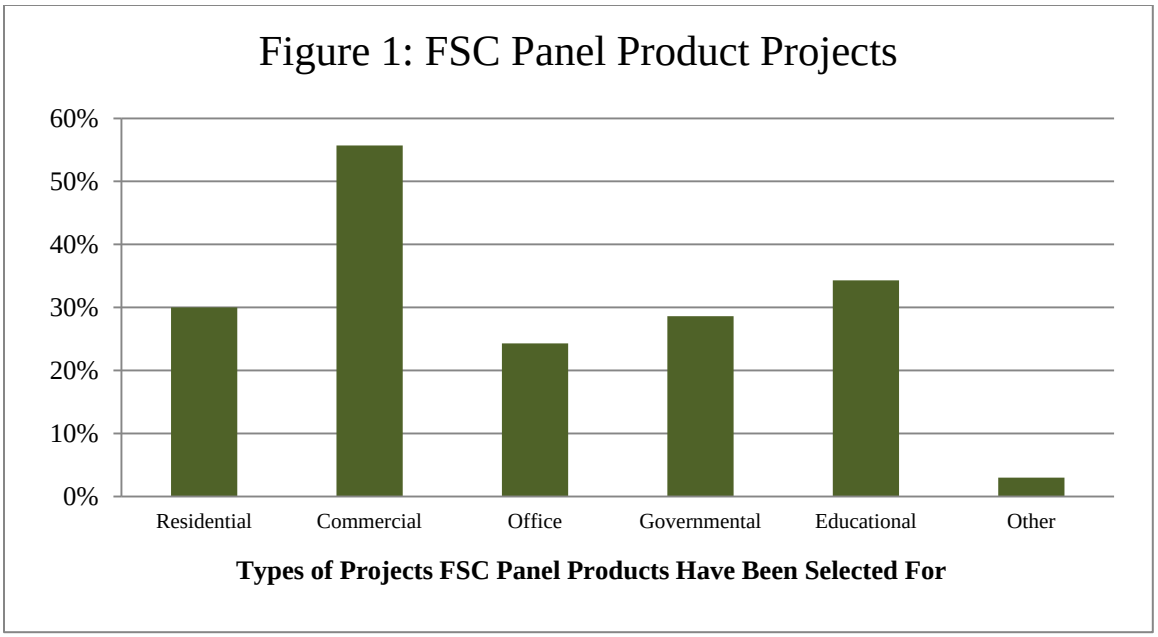
Of the surveyed professionals, 84% responded that they were aware of the Forest Stewardship Council and their mission of responsibly managing the world's forests. Similarly, 85% of the respondents reported seeking out sustainably produced materials when selecting building materials for a project. Interestingly though, only 67% of the respondents reported ever

selecting FSC certified wood for a project. The respondents who reported never selecting FSC wood reported their reason for never specifying FSC wood as follows: perceived added cost (36%), not aware of the FSC certification (32%), lack of availability (14%), not bring interested in sustainability (4%), and several other varied responses, like "sustainability certification is a ruse to establish just another layer of bureaucracy to generate fees for parasites."

The respondents who had reported selecting FSC certified products reported LEED certification as the main reason, as 81% provided LEED certification as their reasoning. Additionally, 15% of the respondents reported "other green building certification" as their reason for specifying FSC certified products, suggesting green building certifications systems drive a substantial part of the demand of FSC certified products. Another substantial factor indicated for driving the demand for these products is support of sustainable forestry, as 58% of the respondents reported this as one reason for specifying FSC certified products. Other factors influencing the selection of FSC products included perceived enhanced performance (10%), client's request (19%), and responses such as "Good karma, and it's better than SFI."

Respondents who have had clients request FSC certified products believed that LEED certification was the major reason, as 52% responded this way. Similarly, 11% responded "other green building certification" as their perceived reason for their client's request, further validating the assumption that green building certification system drives the demand for FSC labeled products. Other perceived reasons for clients requesting FSC labeled products include support of sustainable forestry practices (29%), perceived enhanced performance (9%), and preference for local materials.

The majority of the surveyed industry professionals reported experiencing some type of cost premium associated with sustainably produced materials. The largest number (40%) of respondents reported experiencing a >5% cost premium on sustainably produced products. Another 36% of the respondents reported experiencing cost premiums of 2%-5% for sustainably produced materials. Only 15% reported these experienced premiums less than 2% and 9% reported experiencing no premiums at all. While these figures may not seem particularly insightful, a further analysis, shown later, will demonstrate the correlation of experienced cost premiums with the respondent's region of practice.

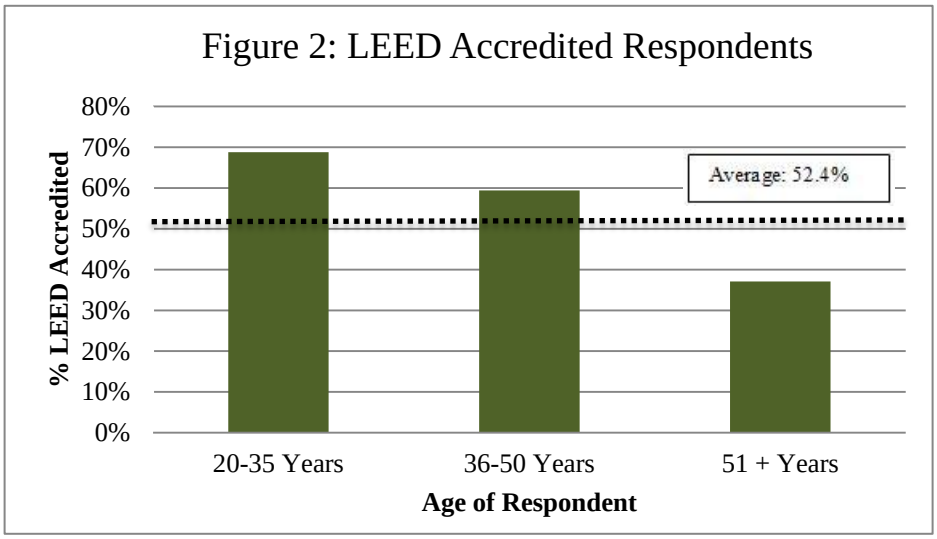


Source: Sustainable Forestry Product Survey, Spring 2012

Of the surveyed industry professionals, 49% responded that they have selected FSC panel products for a project. Moreover, 36% responded they had never selected FSC panel products and 15% were not sure if they had ever selected such products. Of the respondents who have selected FSC certified products, 56% reported selecting these products for commercial projects. Other projects for which respondents indicated using FSC panel products include educational (34%), residential (30%), governmental (29%), and office (24%). Several other projects were indicated (3% of the responses), including outdoor concert, student housing, long term care facility, and a church.

Statistics Based on Age

As previously stated, 52% of the survey respondents claimed to be LEED accredited. Once their age was cross referenced with the LEED accreditation answers, an interesting pattern emerged. The survey indicates younger professionals are more sustainably minded, and more likely to be LEED accredited, supporting the assumption that younger professionals are more concerned with environmental issues. For ages 20-35, 69% of the respondents were LEED accredited. This percentage dropped for the following age group, 36-50 years, to 59% of the respondents being LEED accredited. Another drop in LEED accreditation can be seen for the last age group, 51 years and older, to 37% LEED accreditation percentage.



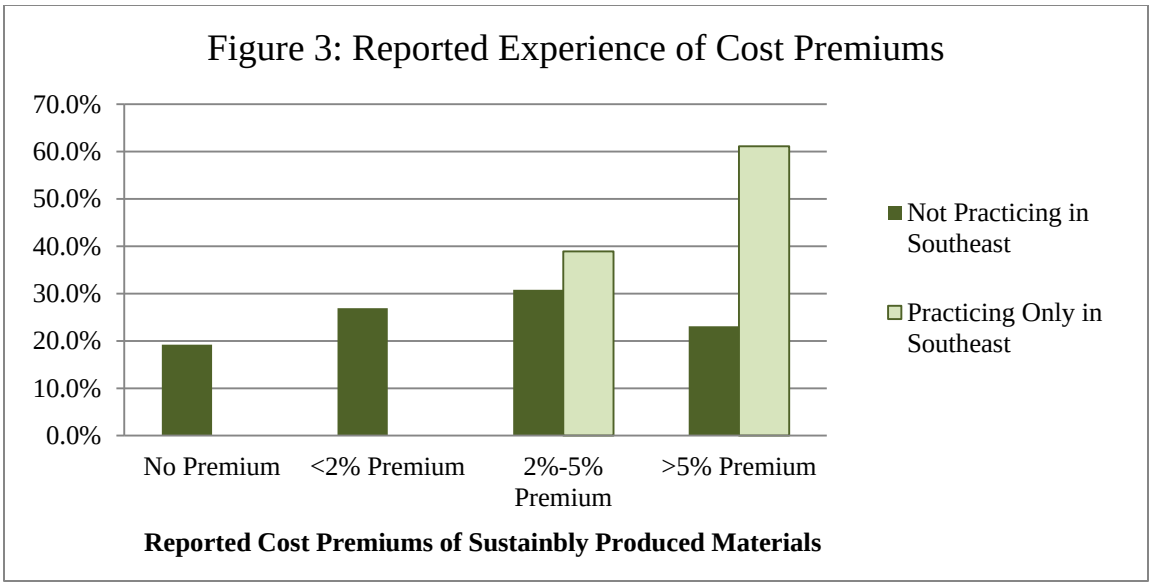
Source: Sustainable Forestry Product Survey, Spring 2012

The pattern of younger professionals being concerned with environmental concerns is strengthened when comparing the age groups' answers to several of the surveyed questions. For example, of the youngest age group, 20-35 years, 93% reported knowing the FSC label and mission (average: 83.9%), 94% reported selecting sustainably produced building materials (average: 85.1%), and 88% reported previously selecting FSC wood for a project (average: 67%).

In all, the youngest age group of respondents was more likely to be LEED certified, more aware of sustainable forestry practices, and more likely to specify sustainably produced materials, indicating an increasing future demand for sustainably produced products.

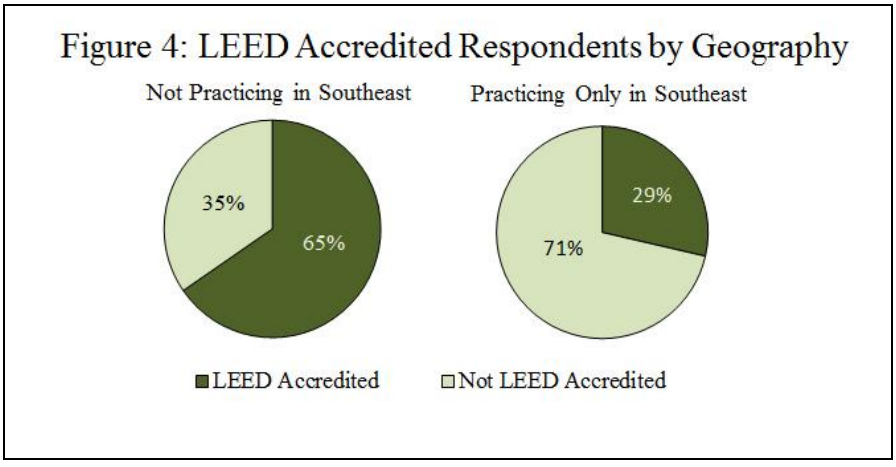
Statistics Based on Geography of Practice

Interesting patterns also emerged when answers were compared from firms who practice solely in the southeast US (21 firms) with firms who do not practice in the southeast (26 firms). Not surprising, firms practicing outside of the southeast are more sustainably minded, as 92% of firms practicing outside of the southeast reported being aware of the FSC label and their mission, but only 81% of the firms practicing within the southeast reported knowing about FSC certification. Accordingly, 92% of firms practicing outside the southeast reported selecting sustainably produced materials for projects, while 71% of firms from the southeast reported they select sustainable building materials. Additionally, 77% of the firms practicing outside the southeast reported having previously selected FSC wood for projects, compared to 48% of the southeast firms who claim to have selected FSC wood in previous projects.



Source: Sustainable Forestry Product Survey, Spring 2012

Another interesting pattern emerged when comparing the experienced cost premiums with sustainably produced materials with firms practicing in the southeast and not in the southeast. For firms practicing outside of the southeast, a very even distribution of perceived cost premium answers were given: 19% reported no cost premiums, 27% reported <2% cost premium, 31% reported 2%- 5% cost premium, and 23% reported >5% cost premium. This even distribution of experienced cost premiums for sustainably produced materials is interesting when compared to the cost premiums experienced with firms practicing in the southeast; 61% claim to have experienced >5% cost premium and the other 39% claim to have experienced a cost premium between 2%-5%.



Source: Sustainable Forestry Product Survey, Spring 2012

Another pattern emerged when analyzing the data that suggests the southeast is behind the sustainability trend. When comparing the LEED accredited results from respondents working in the southeast and respondents working outside the southeast, it is apparent that respondents were more likely to be LEED accredited if they were not practicing in the southeast. In fact, 65% of the respondents practicing outside the southeast claimed to be LEED accredited, compared to the 29% of the respondents working in the southeast who claimed to be LEED accredited (survey average 52% LEED accredited). When analyzing the data, an obvious question comes into play: are sustainably produced materials' cost premiums higher in the southeast or does the lack of LEED accredited individuals result in perceived higher cost premiums associated with sustainably produced materials?

Conclusion

The objectives of this research project were to analyze the history of FSC, the certification process, and the impact FSC is having on the triple bottom line in the industry and also to determine which industry professionals are using FSC products and why. As has been demonstrated, FSC does in fact take the triple bottom line to the timber industry; the certification process requires adherence to the highest social and environmental standards in the industry, allowing the certification holder to profit from these environmentally sound forestry practices.

With regard to the second objective, primary data obtained from survey respondents indicates the following:

- The youngest age group (20-35 Years) is more concerned with responsible environmental practices, as they are more likely to be LEED accredited, select sustainable building materials, and specify FSC products.
- Industry professionals practicing outside of the southeast are more likely to incorporate environmentally sensitive practices, as opposed to industry professionals practicing exclusively in the southeast.
- Industry professionals practicing within the southeast have a much higher perception of cost premiums for sustainably produced products than those practicing outside the southeast.

While on the one hand, it is disconcerting that, based on this research, the southeast appears to be lagging behind other regions in incorporating sustainable measures in the building process, this study does suggest there will be increasing future demand for sustainably produced materials, as the younger age group becomes more established in the industry. The primary research further demonstrates the potential for increased demand for sustainable products is especially prevalent in the southeast, as the data reveals the southeast industry is behind the national average.

Sustainable Forestry Product Survey

Thank you for participating in this survey; your input is invaluable. The results of the survey will be incorporated into a capstone research project for Tulane's Master of Sustainable Real Estate Program. The survey should take less than 5 minutes to complete.

1. Are you aware that the Forest Stewardship Council (FSC) is a not for profit organization established to promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests?

- ◯ Yes
- ◯ No

2. When selecting building materials for a project, do you seek out sustainably produced materials?

- ◯ Yes
- ◯ No

3. Have you ever selected FSC wood for a project?

- ◯ Yes
- ◯ No

4. If you have not selected FSC wood, why not? (Select all that apply)

- [ ] Not aware of FSC certification
- [ ] Not interested in sustainability
- [ ] Perceived poor performance
- [ ] Perceived added cost
- [ ] Not available
- [ ] Other (please specify)

5. If you have specified FSC wood products, why did you do so? (Select all that apply)

- [ ] LEED certification
- [ ] Support of sustainable forestry
- [ ] Other green building certification
- [ ] Perceived enhanced performance
- [ ] Client's request
- [ ] Other (please specify)

6. If a client has specifically requested FSC wood products, what was your sense of the reason for this request? (Select all that apply)

- [ ] LEED certification
- [ ] Other green building certification
- [ ] Support of sustainable forestry practices
- [ ] Perceived enhanced performance
- [ ] Client has never requested FSC products
- [ ] Other (please specify)

7. Have your ever selected FSC panel products for a project (prefabricated building components such as OSB)?

- ◯ Yes
- ◯ No
- ◯ Not sure

8. What types of projects have you selected FSC wood panel products for? (Select all that apply)

- [ ] Residential
- [ ] Commercial
- [ ] Office
- [ ] Governmental
- [ ] Education
- [ ] Other (please specify)

9. In your experience, what is the cost premium associated with sustainably produced products?

- ◯ No Premium
- ◯ <2% Premium
- ◯ 2%-5% Premium
- ◯ >5% Premium

10. Approximately what percent of your practice is in the southeast United States?

- ◯ None
- ◯ Less than 25%
- ◯ Substantial, but less than 50%
- ◯ Substantial, more than 50%
- ◯ Almost all, more than 75%
- ◯ 100%

11. Approximately what percent of your practice is in Louisiana?

- ◯ None
- ◯ Less than 25%
- ◯ Substantial, but less than 50%
- ◯ Substantial, more than 50%
- ◯ Almost all, more than 75%
- ◯ 100%

12. What type of firm are you associated with?

- ◯ Architectural
- ◯ Builder/Contractor
- ◯ Engineer
- ◯ Real Estate Development
- ◯ Other (please specify)

13. What is the approximate size of the firm you work with?

- ◯ Sole Practitioner
- ◯ 2-4 Employees
- ◯ 5-9 Employees
- ◯ 10-19 Employees
- ◯ 20-49 Employees
- ◯ 50-99 Employees
- ◯ 100 + Employees

14. Are you LEED Accredited?

- ◯ Yes
- ◯ No

15. Are you responsible for specifying products for projects?

- ◯ Yes
- ◯ No

16. What is your age?

- ◯ 20-35 Years
- ◯ 36-50 Years
- ◯ 51-65 Years
- ◯ 66 + Years

Thank you for your participation in the survey.

17. Would you like to receive a copy of the research paper, including the results from this survey?

- ◯ Yes
- ◯ No

FSC Product Demand Survey

SurveyMonkey

1. Are you aware that the Forest Stewardship Council (FSC) is a not for profit organization established to promote environmentally appropriate, socially beneficial, and economically viable management of the world's forests?

	Response Percent	Response Count
Yes	83.9%	78
No	16.1%	15
answered question		93
skipped question		2

2. When selecting building materials for a project, do you seek out sustainably produced materials?

	Response Percent	Response Count
Yes	85.1%	80
No	14.9%	14
answered question		94
skipped question		1

3. Have you ever selected FSC wood for a project?

	Response Percent	Response Count
Yes	67.0%	63
No	33.0%	31
answered question		94
skipped question		1

4. If you have not selected FSC wood, why not? (Select all that apply)

	Response Percent	Response Count
Not aware of FSC certification	32.1%	9
Not interested in sustainability	3.6%	1
Perceived poor performance	0.0%	0
Perceived added cost	35.7%	10
Not available	14.3%	4
Other (please specify)	**39.3%**	**11**
	answered question	**28**
	skipped question	**67**

5. If you have specified FSC wood products, why did you do so? (Select all that apply)

	Response Percent	Response Count
LEED certification	**80.9%**	**55**
Support of sustainable forestry	58.8%	40
Other green building certification	14.7%	10
Perceived enhanced performance	10.3%	7
Client's request	19.1%	13
Other (please specify)	10.3%	7
	answered question	**68**
	skipped question	**27**

6. If a client has specifically requested FSC wood products, what was your sense of the reason for this request? (Select all that apply)

	Response Percent	Response Count
LEED certification	**51.9%**	**41**
Other green building certification	11.4%	9
Support of sustainable forestry practices	29.1%	23
Perceived enhanced performance	8.9%	7
Client has never requested FSC products	32.9%	26
Other (please specify)	5.1%	4
answered question		**79**
skipped question		**16**

7. Have your ever selected FSC panel products for a project (prefabricated building components such as OSB)?

	Response Percent	Response Count
Yes	**48.9%**	**43**
No	36.4%	32
Not sure	14.8%	13
answered question		**88**
skipped question		**7**

8. What types of projects have you selected FSC wood panel products for? (Select all that apply)

	Response Percent	Response Count
Residential	30.0%	21
Commercial	**55.7%**	**39**
Office	24.3%	17
Governmental	28.6%	20
Education	34.3%	24
Other (please specify)	15.7%	11
answered question		**70**
skipped question		**25**

9. In your experience, what is the cost premium associated with sustainably produced products?

	Response Percent	Response Count
No Premium	9.9%	8
<2% Premium	14.8%	12
2%-5% Premium	35.8%	29
>5% Premium	**39.5%**	**32**
answered question		**81**
skipped question		**14**

10. Approximately what percent of your practice is in the southeast United States?

	Response Percent	Response Count
None	**30.6%**	**26**
Less than 25%	11.8%	10
Substantial, but less than 50%	9.4%	8
Substantial, more than 50%	3.5%	3
Almost all, more than 75%	20.0%	17
100%	24.7%	21
	answered question	**85**
	skipped question	**10**

11. Approximately what percent of your practice is in Louisiana?

	Response Percent	Response Count
None	**37.6%**	**32**
Less than 25%	14.1%	12
Substantial, but less than 50%	7.1%	6
Substantial, more than 50%	8.2%	7
Almost all, more than 75%	22.4%	19
100%	10.6%	9
	answered question	**85**
	skipped question	**10**

12. What type of firm are you associated with?

	Response Percent	Response Count
Architectural	**62.4%**	**53**
Builder/Contractor	5.9%	5
Engineer	4.7%	4
Real Estate Development	1.2%	1
Other (please specify)	25.9%	22
	answered question	**85**
	skipped question	**10**

13. What is the approximate size of the firm you work with?

	Response Percent	Response Count
Sole Practitioner	7.1%	6
2-4 Employees	10.6%	9
5-9 Employees	11.8%	10
10-19 Employees	20.0%	17
20-49 Employees	**22.4%**	**19**
50-99 Employees	7.1%	6
100 + Employees	21.2%	18
	answered question	**85**
	skipped question	**10**

14. Are you LEED Accredited?

	Response Percent	Response Count
Yes	**52.4%**	**44**
No	47.6%	40
	answered question	**84**
	skipped question	**11**

15. Are you responsible for specifying products for projects?

	Response Percent	Response Count
Yes	**78.8%**	**67**
No	21.2%	18
	answered question	**85**
	skipped question	**10**

16. What is your age?

	Response Percent	Response Count
20-35 Years	19.0%	16
36-50 Years	38.1%	32
51-65 Years	**39.3%**	**33**
66 + Years	3.6%	3
	answered question	**84**
	skipped question	**11**

17. Would you like to receive a copy of the research paper, including the results from this survey?

		Response Percent	Response Count
Yes		**55.3%**	**47**
No		44.7%	38
		answered question	**85**
		skipped question	**10**

Appendix C: RoyOMartin's FSC Timeline

- 2002- ROM became certified with the following certificates
  - FM/CoC for roughly 600,000 acres of company owned timberland
  - CoC for Grade Hardwood Sawmill
  - CoC for Hardwood Oriented Strand Board (OSB) Mill
  - CoC for Pine Plywood Mill
  - CoC for Pine Pole Treating Mill
- After several years following certification, due to an apparent lack of market interest, CoC at the Pine Pole Treating facility was dropped
- April 2007, first 5-year reassessment of FSC certifications at both the mill's CoC and the FM/CoC
- 2007, Pine OSB Mill was opened, Hardwood OSB Mill was closed, transferring the Hardwoods CoC certificate to the new Pine Mill
- 2011, Pine OSB Mill CoC certificate and Pine Plywood CoC certificate were combined into a single Multi-Site CoC certificate, retaining the CoC certificate number from the OSB Mill
- 2011, newly spurred market interest in FSC products prompted ROM to include the Pine Pole Treating Mill and Pine Solid Wood Mill to be included in their Multi-Site CoC certificate.
- March 2012, ROM passed their 2nd 5-year reassessment of both the FM/CoC and Multi-Site CoC, with their final audit pending shortly.