



STTC conference 2018 'Using data to drive market share'

Conference report 'Data collection and coordination key to sustainable tropical timber market growth'



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The European Sustainable Tropical Timber Coalition (STTC) is an alliance of industry, business, government and NGOs dedicated to increasing European demand for verified sustainable tropical timber. The STTC's aim is to develop the market in order to incentivise the growth and spread of responsible forest management in tropical countries. Please visit www.europeansttc.com for more information.

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Introduction

The ambition of the Sustainable Tropical Timber Coalition is to see an increase in sustainably sourced material's share of European tropical timber sales from today's 30% to 50% in 2020.

This in turn, it maintains, will be a significant driver for further spread of sustainable forest management in tropical supplier countries.

And vital to achieving this objective, says the STTC, is accessibility and analysis of accurate trade statistics, hence the title of its annual conference in October – held, appropriately, in the Tropical Gardens in Paris – 'Using data to drive market share'.

To date the STTC has primarily focused, with private and public sector partners, on market education and promotion initiatives, encouraging uptake of lesser-known tropical species and supporting sustainable procurement policy implementation.

Now, with founder IDH, The Sustainable Trade Initiative, it has made the strategic move to focus increasingly on gathering and interpreting trade data; to get a better handle on sustainably sourced tropical timber volumes entering European supply chains, its origins and destinations. This aim is to facilitate more precise targeting of further market development activity.

Until now, the Coalition acknowledges, the European sustainable tropical timber market has lacked a coherent source of definitive trade figures. Some national data monitoring has proved successful, but the pan-European picture has been less clear.

However, the Conference also highlighted that this is changing. Alongside the STTC's efforts, other initiatives, some with its support, have emerged to track the wider European tropical timber market. Speakers also highlighted growing cooperation in the field between different players sharing the same objective of understanding sector trends and market development potential.

In addition the Conference featured presentations on complementary STTC-backed projects to grow European awareness of sustainable tropical timber availability and exploit its market potential. Table Talks also enabled delegates to focus in on specific topics and give feedback.

The Conference themes were clearly ones that struck a chord. The event attracted over 90 delegates from across the EU and tropical supplier countries. Led with zest by enthusiastic professional moderator Peter Woodward – now an STTC Conference regular – it also sparked lively discussion and debate.

Welcome addresses

Three welcome addresses underlined the impact and potential of effective use of data in the tropical timber sector. Emmanuel Fourmann of the French Development Agency highlighted how effective communication had underpinned a project between the International Tropical Timber Technical Association (ATIBT) and national French rail giant SNCF. Convinced by the data on its availability and sustainability, the latter opted to use azobe for sleepers rather than treated softwood on a significant part of its network.



Opening by Emmanuel Fourman

Daan Wensing of IDH held out the prospect of the timber sector working and sharing data with other forest products sectors, notably the signatories to the Amsterdam Declaration on sustainable sourcing, a theme later picked up by Jean-Manuel Bluet of the Alliance of Forest Product Industries. Such a collaboration would be a powerful force for responsible forest management and maintenance, said Mr Wensing.

ATIBT President Robert Hunink added that tropical timber sector data was also core to developing tools and market mechanisms to grow sustainable forest management, such as tax breaks for concession holders. And it was vital too for convincing decision makers that a sustainable forest is a forest that has economic value and provides a source of income.

Plenary Sessions Data collection and coordination

The data collection imperative

Sarah Storck, EU FLEGT IMM

Opening the Conference section headlined '*The data collection imperative*', EU FLEGT Independent Market Monitor Lead Consultant Sarah Storck said its role was to track EU market impacts of FLEGT licensed timber from Indonesia and trade flows from other FLEGT Voluntary Partnership Agreement-engaged countries. It also canvasses EU market views on the EU FLEGT initiative to inform its future development.

She emphasised how a lack of data can undermine a market. "It can lead to risk aversion, poor investment decisions and restricted access to finance and markets for producer groups," she said.

The IMM conceded that obtaining tropical timber market figures is challenging, hence the need for more coordination in the field.

The IMM's implementing agency, the ITTO, said Ms Storck was one organisation intent on improving tropical timber data quality and information flow between producers and consumers.

For the IMM itself, the focus is both trade flow analysis and market research. "Using trade data in isolation is a common pitfall," said Ms Storck. "Our market experts undertake interviews with industry insiders to interpret and contextualise trends, taking into account other supply and demand-side factors, such as fashion, policy measures like the EU Timber Regulation and competing export market demand trends."

In terms of collaboration, the IMM is working with Probos and the Global Timber Forum on a new EU Sustainable Tropical Timber Market Data Project, presented later by the GTF's George White.

"We're also working with the ITTO and GTF on the Sustainable Timber Information Exchange, STIX," said Ms Storck. "This is an open access platform based on UN Comtrade and EU Comext data, cleaned by algorithms developed under IMM and GTF/UK Department for International Development projects."

What can be done with data?

Mark van Benthem, Probos; David Hopkins, UK Timber trade Federation; Delphine Boutaud, SNCF



David Hopkins

Mark van Benthem of forest and timber sustainability analysts and advisors Probos and the STTC highlighted the part trade data played in increasing sustainably sourced material's share of the Dutch timber market from 13.3% in 2005 to 83% in 2015.

A central factor, said Mr van Benthem, was ongoing reporting, including by Probos and underpinned by detailed trade figure recording by Netherlands Timber Trade Association Members, of sustainable timber sales and market share.

"This firstly increased awareness of the need to source sustainably produced timber," said Mr van Benthem. "It has also identified bottlenecks hampering growth, and identified market opportunities and sectors where extra effort was needed to increase certification uptake."

The research has informed further development of public timber procurement policy and helped in prioritising trade initiatives through benchmarking data against procurement criteria and private sector initiatives to increase sustainable timber sales. The latter included projects to grow acceptance of lesser-known tropical species and the country's pan-industry, NTTA-backed Green Deal scheme.

"It also helped in development of tools to drive sustainable timber procurement, such as standard contract clauses and the website www.houtdatabase.nl," said Mr van Benthem.

Despite its progress, however, the Netherlands was 'not there yet'.

"The target is now 95% market share of certified and FLEGT licensed timber by 2020, with an emphasis on tropical hardwood where the current figure is still just 64%, and temperate with an even lower figure" said Mr van Benthem. "So far we've picked the low hanging fruit."

Delphine Boutaud of SNCF elaborated on the organisation's work with ATIBT, assessing the viability of using tropical timber for sleepers. "Together we established a business, environmental and technical rationale for using tropical wood with third party certification," she said. "And we will be passing on outcomes from the project to other rail organisations and business partners across Europe."



Panel discussion

Managing Director David Hopkins stressed the importance the UK Timber Trade Federation also attached to data. "Our monthly market statistics enable members to benchmark performance against the wider economy and aggregated industry data and we also look at audit returns from our obligatory Responsible Purchasing Policy due diligence system," he said. "We drill down to the granular detail, including use of certification and legality verification as means of [illegality] risk management."

Latest TTF figures show that 95% of UK total timber imports and 50% of tropical are certified. But closer analysis has revealed the picture may not be as positive as the numbers initially suggest. "Most UK imports are European softwood, explaining the overall certified total, and after closer scrutiny we feel the 50% of tropical imports certified might in reality be closer to 30%," said Mr Hopkins.

Analysis also suggests UK certified tropical imports may be in long-term decline. “Certainly current evidence indicates we won’t hit the WWF Forest Campaign goal of 100% sustainable sourcing by 2020, which we and many companies supported,” said Mr Hopkins. “More importantly it suggests that, for various reasons, we may be approaching peak certification. We hugely respect the achievements of the main two international certification companies, the FSC and PEFC, but we may be reaching their market penetration limits. This prompts the question of whether we need new sustainability metrics, which I’d suggest provides a strategic opportunity for the FLEGT VPA initiative. Moving to a new approach will also put even more onus on ensuring reliability of data, especially from tropical countries.”

Methods of data collection

Rupert Oliver, EU FLEGT IMM

IMM trade analyst and STIX co-ordinator Rupert Oliver opened with equally hard-hitting comments. Historically, he said, international timber industry and especially tropical data quality had been poor. This had contributed to short termism and ‘ineffective policy’.

“Too often policy goals drove data collection, when data should be driving policy development,” he said. “And given this industry is increasingly globalised, and undergoing critical shifts in trade patterns, notably in the tropical sector with the eclipse of Europe by China as the leading market influence, there’s never been a more important time to rectify the situation.”

Illustrating problems analysts face, he added, that “a quarter of tropical countries supply the same data year in year out” to ITTO trade surveys.

However, on a more positive note CIRAD is now focused on increasing understanding of Africa’s key growing domestic timber markets and there are new tools and a new impetus behind data gathering and analysis overall.

“We’ve seen massive improvements in information and communications technology and data visualisation systems,” said Mr Oliver. “There are also tremendous opportunities under the FLEGT initiative to develop new data sources and also for the FSC and PEFC to build on the work they’ve already done – in fact they are now starting to include dual certification within their data set.”

The IMM project could also play a key role in improving trade data quality and use, including in understanding the market relationship of the EU FLEGT initiative and certification.



Rupert Oliver

Towards international collaboration

George White, GTF

Looking at the latest departure in tropical timber market analysis, George White said the new IDH/STTC backed project mentioned earlier by Ms Storck involved a partnership of Probos and the GTF in collaboration with IMM and the STIX platform. And it was announced at the conference that it would also include data gathering in Congo producer countries by the ATIBT.

The study is measuring tropical timber market share taken by PEFC and FSC-certified, FLEGT-licensed and FSC controlled wood, plus timber from FLEGT VPA engaged countries and other sources. It will also include fresh assessment of forest area under sustainable management and its carbon impacts.

The objective is to make recommendations to IDH/STTC and policy makers for certified and verified timber market development. The project will also use 'exposure to certification' analysis to calculate market share figures. Essentially this takes the percentage of certified forest area in a supplier country and applies the figure to import flows from that country into specific markets.

"The method has its limits," said Mr White. "But we believe it can be refined by, for instance, using percentage of certified timber produced rather than forest area, and targeted trade interviews."

The way ahead

Jean-Manuel Bluet, Alliance of Forest Product Industries (AFPI); Nienke Stam, IDH/STTC

Mr Bluet of the Alliance of Forest Product Industries echoed Mr Wensing's call for even wider coordination and data sharing in sustainable forest products sourcing. The AFPI proposes cooperation across European forest commodity sectors, including timber, soy, palm oil, coffee and cocoa. "We want to see a federation of these actors working towards 100% verified procurement to preserve tropical forests," said Mr Bluet.

Meanwhile Nienke Stam, IDH Tropical Timber Programme Manager, highlighted that further data research to steer market development would be a core element of the STTC's 2018-20 roadmap. And among new data-based reports by GTF/Probos Mr White presented earlier would be a 2018 sequel to its 2016 publication '*How Sustainable are Europe's Tropical Timber Products?*'. This highlighted the bottom line of growing the market for responsibly sourced tropical timber. If Europe's seven leading timber-consuming countries sourced exclusively verified sustainable primary tropical timber, it concluded, 5.3 million ha more tropical forest would be brought under sustainable management.



Delegates at the conference

Table discussions

Experiences in tropical timber data gathering

In the STTC Conference Table Talks session, delegates could choose to participate in three of 10 different discussions around the theme of data and tropical timber trade hosted by figures from across the EU trade. The result was highly animated conversation.

Gathering data as part of policy to increase market share of verified sustainable timber among trade federation members

Alberto Romero, AEIM

According to members of Spanish federation AEIM, said General Secretary Alberto Romero, ensuring accuracy and transparency were critical in using data to help increase verified sustainable tropical timber market share. And underlining the urgency of that task, it currently estimates that figure for Spain at just 5% in terms of lumber.

Questions emerging from discussions included how best to track intra-EU trade in sustainable tropical timber and to source up to date and accurate production data. A suggestion from delegates was also that European federations use a common template for data collection and analysis to ensure figures can be compared on a like for like basis.



Sharing experiences

How NTTA members achieved market 64% verified sustainable tropical timber market share

André de Boer, ETTF

European Timber Trade Federation Secretary General André de Boer led a conversation on the Netherland Timber Trade Federation's requirement for members to submit figures on sustainable tropical timber sourcing. Some initially left in protest. However, they returned and the NTTA's focus, combined with the influence of NGOs and government procurement policy, has since helped members achieve 64% of tropical timber imports sustainably sourced.

Mr de Boer said that, while FSC and PEFC certification is not officially a pass through EUTR due diligence, it is recognised by the industry as an effective risk mitigation tool and sourcing certified wood makes the further due diligence required under EUTR less onerous.

Another topic delegates focused on was an ongoing lack of understanding among customers of the difference between certified, legal and EUTR- compliant timber.

How to set up a responsible sourcing policy and measure progress

David Hopkins, UK Timber Trade Federation

In setting up a responsible sourcing policy industry organisations should draw on as wide a spread of stakeholders, references and data sources as possible, from FSC and PEFC national offices, to certification auditors and local NGOs, said Mr Hopkins. It was also vital that it must be both easy to implement by members, but rigorous enough to satisfy the spread of stakeholders.

Contributing the experience of FSC Denmark, Kristian Jørgensen agreed and said the watchwords for any policy should be 'trust is good, but evidence is better'.

He added that, while the role of the EUTR is to ensure timber legality, it had also act as a spur to organisations in Denmark, such as the Danish Timber Federation, and also companies to implement their own verified sustainable timber policy.

The exposed to certification analysis method explained

Rupert Oliver, EU FLEGT IMM Trade Analyst

IMM Trade Analyst Rupert Oliver looked at the developing 'exposure to certification' method to assess percentages of sustainably certified timber in international trade flows. It takes the proportion of certified forest in a supplier country and applies it to imports from that country in a consumer market. In itself it is an indicator rather than a precise measure, but it is a tool capable of refinement with further international research and input, said Mr Oliver.

The goal is in fact to build an algorithm for using it and to develop it as a "free global trade tool".

"It is a simple mathematical analysis," said Mr Rupert. "It is currently based on assumptions and there are holes in the approach. We'd like to look at ways of filling those holes and improving it."



Experiences in implementing the 'source approach' in Belgium

Dries van der Heyden, Bos+

Dries van der Heyden of Bos+ said that, following Belgium's 2011 timber sector agreement to source sustainably, a survey found that the market share of all sustainable wood in the country rose from 40% to 60% in five years.

The key to any such agreement was to encourage precompetitive collaborations in the industry and secure leading companies' support, plus total transparency and reliable data, which are needed for both accountability and credibility.

Suggestions for a new Belgian timber trade agreement included a requirement for verified sustainable timber certification, involving the certification schemes and including a legality+ definition or category for wood.

Measuring Netherlands timber market share for over a decade

Jan Oldenburger, Probos

In its market monitoring Probos used a 'source approach', recording the volume of primary timber products at entry to the market, said the organisation's Jan Oldenburger. Information was gathered from importers and also from domestic producers. The method was designed to gain acceptance from the range of stakeholders, including government, certification bodies and industry associations. With this achieved, timber companies are clearly happy to submit data. In fact of the 200 approached for Probos's 2016 survey, 60-70% responded.

A key source of data for Probos is the Netherlands Timber Trade Association. Each year it collates information on members' volume of primary products imported, product type and country of origin. Five members annually are audited by a third party to check data accuracy.

Working in partnership to drive sustainable timber trade from Asia to Europe

Julia Kozlik, PEFC International

Canvassed by Julia Kozlik on ways to increase sustainable timber trade between Asia and Europe, delegates stressed the need to engage the spectrum of key Asian industry stakeholders. They also urged adoption of fully sustainable public procurement in Europe and efforts to convince consumers of the benefits of buying sustainable tropical timber.

Measuring the market for sustainable timber; FSC's goals and challenges

Luca Costa, FSC International

Luca Costa of FSC International said its Global Market Survey was a major undertaking. It involved sending out 35,000 questionnaires, to which it got a 15% response rate. Currently the organisation is also finalising analysis of 1500 forest management audit reports. Certification bodies are not obligated to report on trade volumes, said Mr Costa, and currently tend to divide data by forest zone (boreal, temperate and tropical), by type (natural, semi-natural and plantation) and by country/region.

Despite all the data behind certified timber, however, some delegates said they were still having to sell a proportion of it as uncertified due to poor demand. It was a topic, they said, that still needed attention.

Monitoring experiences by Le Commerce du Bois members

Arnaud Hétrait, Le Commerce du Bois

Currently plenty of data is being recorded and monitored with regards to French tropical timber trade, said Arnaud Hétrait, Director of French federation Le Commerce du Bois. But currently it is a multi-faceted, fragmented scene. Collating wood import volume figures based on customs nomenclature are companies, official agencies, such as customs, certification systems, ports and trade federations. Meanwhile, another group, albeit with some overlap, is collecting data with regards to trade in certified wood, as well as assessing numbers of chain of custody certificates, certified forest areas and percentages of wood purchases accounted for by certified material; companies, certification systems, trade federations and control/monitoring bodies such as NEPCon.

The question posed is how these two data collection approaches can be aligned and coordinated to help generate an accurate data set on certified trade volumes that is agreed and accepted by this spread of different actors encompassing; evolution of certified purchases, area of certified supplier concessions and certified harvest, production and export volumes.

As a administrator of both FSC and PEFC France and with access to members' CoC information, LCB was put forward as an acceptable hub for this task, working together in a 'tripartite observatory' with public sector and NGO partners and also coordinating with data collection activities of other European Federations. A further suggestion to facilitate collection of data on certified volumes was to include certification details in mandatory documentation, such as customs forms.

Accurate data, Table Talk participants concluded, can be a vital tool for targeting efforts to drive the spread of good forest management and for steering communication on certification and verification, so ultimately helping grow supply and purchase of sustainably sourced tropical wood.

Getting more certified timber from tropical countries

Paul-Emmanuel Huet, PEFC France

Tackling the topic of how to get more certified timber from tropical countries, a discussion led by Paul-Emmanuel Huet of PEFC France, delegates recommended that the EU should recognise third party certification as meeting the requirements of the EUTR; becoming effectively a green lane through the Regulation.

To incentivise forest owners and managers to certify, it was also important to cut the costs of the certification process and make them more uniform. Due to the current lack of a price premium for certified products in the European market, this was also a course favoured by operators.



Making progress at national level

After the Table Talks, Conference delegates divided by country to discuss both next steps for industry data collection and to define activities to further drive sustainable timber market share.

The following are a few of the recommendations:

UK

- Simplify market data and make it easy to collate
- Align data criteria with EU partners
- Increase tropical timber market engagement, education and promotion activities
- Identify other metrics to measure "sustainability" or to define progress towards it

Germany

- Unify definition of sustainability in codes of conduct. And simplify!
- Ensure data has a future-related benefit, inform consumers and help grow demand
- Ensure data enquiry uniformity from certification /federal/consultant bodies

Spain

- Encourage international alignment among timber trade federations on data gathering / reporting
- Raise public awareness on the importance of sustainability
- Lobby for the Spanish government to sign the Amsterdam Declaration on forest products sustainability

Belgium

- Work for European market data uniformity
- Ensure new Belgian timber sector agreement is sufficiently resourced and wider in scope, communicated effectively and encompasses public procurement
- More support for used tropical timber

Denmark

- Define relevant trade data and ensure it has the right detail
- Agree nationally on what data is relevant to the Danish TTF, certification schemes and other relevant stakeholders
- Gauge market perceptions of tropical timber



Delegates of Denmark

Peru

- Step up data gathering and coordination
- Improve data accessibility and diffusion
- Communicate biodiversity facts

Africa

- Establish certification of origin data requirements of different authorities
- Increase customs data reliability
- Establish independent data source to pool input from customs, certification schemes, the ITTO, FAO, the Ministry of Forestry and NGOs

The Netherlands

- Ensure data is easy for the industry to understand and use and comparable between countries
- Compare and analyse the differences in performance between countries
- Set data in framework of climate agreement
- Digitise information
- Ensure accuracy of product codes at customs

France

- Improve communication on certification to business and consumers
- Communicate on global values not specific certification schemes
- Ensure sustainable procurement policy is implemented by government and specifiers
- Develop communication to architects on timber use and certification
- Develop use and valorisation of timber locally in Africa.

*Delegates of France*

Annex 1: Plenary session STTC flagship projects aim high

The Conference also heard the latest on four 'flagship projects' for sustainable tropical timber market development the STTC has supported.

Benoit Jobbé Duval, Managing Director of ATIBT (the International Tropical Timber Technical Association) described its uniquely collaborative My Tropical Timber website. This provides visitors with all the information they require to specify tropical timber species and details their potential applications. What really differentiates it, however, is its live lists of suppliers in various European countries, which are managed by collaborating national trade federations.

"The goal of the website is to guide buyers on what wood to select, what to use it for and where to buy it," summed up Mr Jobbé Duval.

Julia Kozlik of PEFC International focused on her organisation's efforts to increase certified trade flows from Asia to Europe. Projects included awareness raising through industry media and conferences in Asia, building capacity, with chain of custody training and establishment of a PEFC support desk in Vietnam.

Another element was European promotion of Asian moves to grow certification. In particular, Ms Kozlik highlighted the PEFC's programme to replicate the 76.8% figure of forest certified in Peninsular Malaysia in Sabah and Sarawak. She also described latest work to help deliver a national forest certification system in Myanmar.

Anand Punja of FSC Europe described its 'Together we are FSC' market initiative, to which STTC backing had enabled it to add a 'tropical timber edge'. The campaign's aim is to use positive messaging around the use of wood, highlighting the social benefits of specifying certified sustainable material and, as NGOs had 'harnessed emotions to turn people off tropical wood', do the same to turn them back on to it.

'Backed by solid data' the campaign materials can be tailored to individual company requirements helping a 'fragmented industry come together behind a common positive message'.

Jessica Tholon, Communications Manager at French Federation Le Commerce du Bois (LCB) presented its broad ranging activities to change French market attitudes to tropical timber and to support sourcing from verified responsibly managed forests. These have included launch of a satellite website, "The good choice of tropical timber", and the campaign "I choose tropical timber", using architects' and other specifiers' personal testimonies on why they select and specify tropical.

The LCB has also developed a digital tool kit to support members' tropical timber sales, organised regional meetings for the sector and developed presentations and educational materials for architectural and vocational schools to target the specifiers of tomorrow.

Annex 2: Conference Programme

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| 9.00 | Welcome and registration |
| 9.30 | Opening |
| | <p>Welcome by hosts <i>Emmanuel Fourmann (Agence Française de Développement), Daan Wensing (IDH/STTC), Robert Hunink (ATIBT)</i></p> |
| | <p>Agenda, process and introductions <i>Peter Woodward (Moderator)</i></p> |
| 9.55 | Session 1 - STTC impact update |
| | <p>Update of STTC activities Pitches of 4 STTC flagship projects: <i>Benoit Jobbé-Duval (ATIBT), Anand Punja (FSC Europe), Julia Kozlik (PEFC International), Jessica Tholon/Arnaud Hétrait (Le Commerce du Bois)</i> <i>Participant discussion</i></p> |
| 10.50 | Coffee Break |
| 11.15 | Session 2 - The data collection imperative |
| | <p>Extended welcome <i>Sarah Storck (IMM)</i></p> |
| | <p>What can be done with data collected? Inspiring examples of data based actions to make the tropical timber market more sustainable. Presentations from governmental, federation and company level. <i>Mark van Benthem (Probos), David Hopkins (UK Timber Trade Federation), Delphine Boutaud (SNCF)</i></p> |
| | <p>Panel discussion</p> |
| | <p>Introduction to afternoon TableTalks <i>Peter Woodward</i></p> |
| 12.25 | Lunch |
| 13.25 | Session 3 - Data gathering experience |
| | <p>Methods of data collection Setting the scene by <i>Rupert Oliver (Independent Timber Market Monitoring trade analyst)</i></p> |
| | <p>TableTalks An opportunity to explore a selection of case studies and activities exemplifying data gathering. Participants are to choose 3 TableTalks. The TableTalks are held 3 times in parallel. For the list of tables p.t.o.</p> |
| 15.05 | Coffee Break |
| 15.30 | Session 4 - Making progress at (inter)national level |
| | <p>Making progress at national level An opportunity for participants from the same nation to discuss next steps for both data collection and define activities which help drive market share. For list of countries, p.t.o.</p> |
| | <p>Towards international collaboration <i>George White (Global Timber Forum), Q&A</i></p> |
| 16.40 | Session 5 - Roadmap STTC |
| | <p>The STTC road towards 50% sustainable European tropical timber imports by 2020 <i>Nienke Stam (IDH/STTC), Observations from participants</i></p> |
| 17.15 | Closing |
| | <p>Closing words by <i>Jean-Manuel Bluet (Alliance for the Preservation of Forests)</i> Wrap up by <i>Peter Woodward (Moderator)</i></p> |
| 17.20 | Invitation for drinks and bites |

