Connecting Markets to Landowners

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• Goal
  – Increase the amount of fiber procured from certified forestlands or through certified fiber sourcing programs in the U.S. from 2005 to 2020
  – Work to decrease illegal logging

• Progress
  – 2005 – 23% from certified forests
  – 2012 – 29% from certified forests
  – 2005 – 87% certified fiber sourcing
  – 2012 – 95% certified fiber sourcing

Source: 2014 AF&PA Sustainability Report
International Paper

• Goal
  • 35% global increase in third-party-certified fiber volume.

• Progress
  – 2011 – 6.5% above 2010 baseline (18.8 million tons)
  – 2013 – 22.8% above baseline

Source: International Paper 2013 Sustainability Report
MeadWestvaco

• Goal
  – 100% fiber procurement from responsible sources
  – 50% fiber certified by 2020

• Progress
  – 2010 – 26% certified
  – 2012 – 33% certified

Source: MWV 2012 Corporate Responsibility Report
Graphic Packaging

• Goal
  – 2016 – Increase certified fiber purchase to 25%

• Progress
  – 2011 – 20%
  – 2012 – 21%

RockTenn

• Goal
  – Increase sourcing from certified and responsible sources by encouraging forest landowners to certify lands to accredited certification programs
  – 2020 have 100% chain of custody fiber certifications

• Progress
  – 2009 – 10% COC fiber certifications
  – 2011 – 43% COC fiber certifications

Source: Rock Tenn 2012 Sustainability Report
Weyerhaeuser

• Goal
  – At least 95 percent of timberlands are certified to sustainable forestry standards

• Progress
  – 100% of timberlands are SFI certified
  – 64% of procured fiber is certified
  – Stated preference for ATFS

Source: 2013 Sustainability Report
Kimberly-Clark

• Goal
  – Global Tissue Fiber will consist of 90% FSC, recycled or alternative by 2025

• Progress
  – Virgin fiber 37.5% FSC
  – N.A. tissue fiber 44% FSC Mix and 29.5% recycled
  – Global tissue fiber 44.3% FSC Mix and 33.9% recycled

Source: Kimberly Clark 2012 Sustainability Report
Domtar

• Sustainability Goal
  – 25% increase of FSC between 2010 – 2020
• Fiber Procurement in 2012
  – 17.1% FSC
  – 7.4% SFI
  – 6.1% CSA
  – 0.3% ATFS

Source: Domtar 2012 Sustainability Report and 2013 Annual Report
ClearWater Paper

• Sustainability Goal
  – Maintain 100% FSC certified or controlled through 2017

• Fiber Procurement in 2012
  – 66% FSC certified
  – 34% FSC controlled
Tree Farm Certificate Types

- Individual Third Party Certification
- Group Certification through Independently Managed Group (IMG) Organizations
- Group Certification through ATFS Regional State Programs
What is the Difference?

State Tree Farm Program
- Regional Certificate held by AFF
- Max – 10,000 acres
- Operates with ATFS Monitoring & System
- Larger Pool, More Partners

IMG
- Unique Certificate issued to IMG Manager
- Max – 20,000 acres
- System Customized by Manager
- More Control, Less Risk
Alabama Tree Farm Project

• Double certified acres
  – Low hanging fruit
  – Mass enroll stewardship
  – Direct marketing

• One message
  – Certified preferred by industry

• One offer
  – Visit from a forester

• One touch
Social Marketing

• Marketing designed to change behavior for society’s benefit
  – Recycling
  – Seat belts
  – Anti smoking
Nutshell of Social Marketing

• Identify specific outcomes and landowner actions
• Select landowners most likely to be interested
• Determine benefits and barriers to take action
• Implement strategies to overcome those barriers
• Conduct pilot tests & full campaign
• Sustaining strategies – communications
• Evaluate, adapt and repeat
Oak Hickory in the Driftless

- Six marketing campaigns
- Segmented landowners using micro data – hunting licenses, magazine subscriptions, taxes
- Four pieces each
- Thirteen percent response
- 90% Uninvolved
- Twice as likely to accept a peer visit than a forester visit
- Sustained strategies produced 29% to take an additional step
Certification Projects

- SFI, Inc. – North Carolina
- Vermont Woodland Owners Association
- Forest Product Companies
Longleaf in the Piney Woods

- Two marketing campaigns with tax rolls only with 4 pieces each, 3 messages and 3 offers
- 7% response
- 32% uninvolved
- 62% information
- 21% forester
- 14% biologist
- Market campaign with micro data and B&B research
- Sustaining strategies
SFM and Shortleaf on the Cumberland Plateau

- Partners – AFC, NRCS, Auburn University SOFWS, Extension, AFA, Farm Bureau
- Promote sustainable forest management
- Riparian forest improvements – BMPs, invasives
- Shortleaf pine restoration – prescribed burning, reforestation
Take Home

• Engage fewer landowners and commit to them
• Identify your prospects interests, segment, design and market to them based on their interests
• Meet landowners at their level of engagement, provide intermediate steps towards the goal
• Include multiple points of contact in your campaigns
• Nurture the relationship with sustained communications and continued offers
• Track progress, evaluate, adapt and repeat
• Address trust barrier with partners