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# The intelligent route to sustainable trade



Market analysis and monitoring is key for driving certified sustainable sales share

PHOTO: MARK VAN BENTHEM, PROBOS

Accurate market intelligence lies behind the strong development of the Netherlands' sustainably sourced timber market. And says **Mark van Benthem**, Senior Forest Management and Industries Consultant at one of the key operations involved, non-profit knowledge and innovation institute Probos, the country wants to share its experience and success in this field with others.

"The Netherlands has one of the most evolved markets for certified timber from sustainably managed forests worldwide. In fact latest figures show certified sustainably sourced products now account for 74% of all primary timber sales.

This is the outcome of combined public and NGO pressure, resulting in demanding timber procurement policies being implemented and

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## The intelligent route...continued

promoted by trade federations, national and local government and individual companies.

In addition, the Netherlands has seen wide ranging efforts to boost demand for certified timber products and remove potential obstacles to availability.

Central to the effectiveness of these measures and initiatives has been knowing which markets to target and that, in turn, has been achieved through comprehensive market intelligence and marketshare monitoring.

Over its 50 years, Probos has been at the heart of this effort; building up extensive experience in timber market study and data collection, including in our capacity as a national correspondent for bodies such as the UN Economic Council for Europe, Food and Agriculture Organisation and International Tropical Timber Organisation.

Since 2006 we've measured marketshare of sustainably sourced timber in the Netherlands four times and in Belgium, with Belgian partners, twice, .

In conjunction, we have undertaken more in-depth analysis to pinpoint market bottlenecks that hamper sales growth. The combined

results of these studies have been used to help companies accelerate development of their sustainably sourced timber trade both in the Netherlands and abroad.

Based on our experience we believe it is essential that other countries conduct similar market assessment to help make sustainably sourced timber the norm. Many governments have invested in efforts to grow sustainably sourced timber trade. But few base strategies on hard figures and this can limit effectiveness.

And the credibility gained through having sound and detailed facts and figures has clearly also assisted in development of our other initiatives and activities in the Netherlands to promote sustainable timber sourcing and sales.

Working with other partners, we established an industry group to assist chain of custody (CoC) management, when CoC certification was still a bottleneck for mainstreaming certified timber. This has over 500 members and the Netherlands now has the highest per capita total of CoC-certified companies.

We also work with the Dutch government on the operation of its timber procurement policy, running a helpdesk, training and website for procurement officers.

In conjunction, we've developed the

[www.houtdatabase.nl](http://www.houtdatabase.nl) website, giving technical and supplier data on 200 types of timber and wood panel, plus information on their availability with government procurement policy aligned sustainability certification. This includes a range of lesser-known species.

The Netherlands imports 93% of its timber, giving us both a considerable task to ensure it is sustainably sourced, but also leverage for encouraging suppliers to adopt sustainable forest management policies. And this leverage is strengthened through cooperation with partners, including the European Sustainable Tropical Timber Coalition.

We want to extend this collaboration and further share the experience and expertise we've gained in developing markets and demand in the Netherlands for timber from sustainably managed forests. Our methodology has been developed in cooperation with large numbers of stakeholders and taken time and resources. Through cooperation and best practice exchange we can help others looking to develop and promote their sustainably sourced timber markets, do so more quickly and avoid duplication of effort and reinvention of the wheel."