



EFORWOOD

Sustainability Impact Assessment
of the Forestry - Wood Chain



Project no. 518128

EFORWOOD

Tools for Sustainability Impact Assessment
Instrument: IP

Thematic Priority: 6.3 Global Change and Ecosystems

Deliverable D5.2.3

Case study report containing analysis of the most relevant value chains from a FWC sustainability, consumer/market and micro-economic perspective. The report is based on a range of qualitative and quantitative methods including surveys, interviews and focus groups (Executive Summary)

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AIDIMA

Executive Summary

This document is written by the researchers of Aidima (Spain), STFI-Packforsk (Sweden) and Pöyry Forest Industry Consulting Oy (Finland), researching consumers attitudes from different aspects on different FWC product groups and sustainability (books/printed materials, packaging, furniture), at the supply side, and also at the demand side of two different purchasers profiles: end users (business to consumers, B2C) and professional purchasers (business to business, B2B), to present new trends and new requirements from markets in a straight line connected to printing and publishing, packaging, wood products/furniture, and bio-energy industries. Present document is intending to change the perspective for sustainability analysis, changing from an industry driven development to a market orientated development, and to reflect on the future evolution of forest-based business models.

The methods applied to the investigation were qualitative and quantitative; consumer surveys, face to face interviews with experts, focus groups. The markets involved in this research were specially Sweden, Spain and Finland, with some research done in Germany. In case of packaging we also examined the consumption in Slovakia and the United Kingdom according to previous extra EFORWOOD research.

The results reflect that in Europe consumers are not valuing only the price and functionality of the products, but intangible assets as well (emotional, social, experience, meta-preferences) and there is also the phenomenon of cultural homogenization, and the globalization of the markets to count with.

There were differences to be observed between perceptions of the end users (B2C) of **furniture** in Sweden and in Spain: for Spanish consumers the determining factors are price, functionality, additional services, while for Swedish consumers besides the three factors mentioned before are also determinative the design and environmental characteristics. Professional buyers (B2B) have highlighted the design, services, and adaptation to safety requirements.

The perceptions of the end consumers on the **packaging** materials are different in Spain and in Sweden, with the fact in Sweden the buyers are taking into consideration the environmental aspects of the products, not only the functionality, appearance, and price. In Spain end users were very neutral towards the fibre based packaging, and consider it to be expensive. Amongst professional purchasers there were not realized strong preferences of fibre based packaging to the other materials.

The perceptions of the end users on **books** and **other fibre based printed materials** are similar in Sweden and in Spain. Functionality, price, quality and recyclability are the most significant aspects that are important for them, but also the time that they can spend reading. The professional purchasers are also taking into consideration the emotional values that these products are carrying, and that their purchases are influenced by the price and quality.

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There are certain advantages and disadvantages of **pellets** that both B2B and B2C market players have perceived; the high one-time investment costs, the large storage capacity that pellets need, and also the time and effort that maintenance requires are considered to be disadvantageous characteristics, and the factors that are advantageous are the following: environmentally sound way of heating, low running costs, and independency from fossil fuels.

Analyzing the results of investigation on sustainability there were two major consumers' attitudes to be observed:

CONSCIOUS CONSUMERS, with knowledge about sustainability and its dimensions, who have political concerns about sustainability impact, who are ready to act (e.g. Sweden) through their habits for it,

who have trust in information labels of sustainability, and who have a certain (limited) willingness to pay extra for sustainable products.

NOT CONSCIOUS CONSUMERS, with no information about sustainability and its dimensions, scepticism about sustainability, who don't trust the communication on sustainability, who need to be educated on the topic and who are not ready to pay any extra for sustainable products. The profile of professional buyers fits into the group of not conscious buyers.

The negative impacts of globalization to economic and social sustainability on the production of wood based goods in Europe are mainly influencing the future sustainability of the industry. The forest based industry should provide education for the consumers, should bear the costs of information deficit, and build credibility.