


Market Sectors

Opportunities, Challenges and Drivers

March 27, 2018

	Who Are the Market Drivers	Challenges	Opportunities	Events
Packaging	<p>Large multi-national brand owners and retailers.</p> <ul style="list-style-type: none"> • Unilever • Nestle • Mars • Walmart • P&G 	<ul style="list-style-type: none"> • Multi-national organizations with preference to FSC. • Drivers typically come from Europe. • While activist groups have been quiet, there is always a threat. This too is a challenge to get some brands and retailers to support SFI publicly. 	<ul style="list-style-type: none"> • The majority of packaging manufacturers in the U.S. are certified to the SFI standard. • SFI can position itself as low risk in the supply chain. • ALDI's recent packaging policy can help set a blueprint for other brands on recognizing fiber sourcing, and all forest certification programs equally. <div style="text-align: center;">  <p>Forestry Policy for Packaging - Supplie</p> </div> <ul style="list-style-type: none"> • The Sustainability Consortium can also provide a roadmap for companies as they take an inclusive approach. 	<ul style="list-style-type: none"> • SustPackUS • Sustainable Packaging Coalition • GreenBiz • Sustainable Brands
Lumber/Solid Wood	<p>Green building markets</p> <ul style="list-style-type: none"> • LEED • Architects who spec certified wood • BREEAM 	<ul style="list-style-type: none"> • 20 plus years of not being recognized by LEED has been a challenge to move architects away from FSC. • Obtaining the certified wood point in LEED v4 is a very challenging credit to obtain. Even for FSC. • Hardwood markets rely on small family forest landowners, of which are not certified. 	<ul style="list-style-type: none"> • SFI is recognized in the LEED Alternative Compliance Path. We need to leverage this opportunity with architects and builders. • SFI is recognized in almost every other green building rating tool (BREEAM, GreenGlobes). • SFI's new partnership with UL Environment will make it easier for architects and designers to source SFI certified products. 	<ul style="list-style-type: none"> • Window Door Manufactures Association • Mass Timber • Canadian Hardwood Bureau • Southern Timber Innovations Conference • GreenBuild • AIA

<p>Textile</p>	<p>Leading textile manufacturers (Lenzing, Birla, Sateri), as well as clothing companies, create FSC preferences and ultimately demand for FSC pulp.</p>	<ul style="list-style-type: none"> • Almost all of the manufacturers are global, thus very limited knowledge on SFI. • This is a sector we haven't worked with, so it's getting to know who the key players are. • Canopy has been effective in getting clothing brands to adopt FSC preferences. 	<ul style="list-style-type: none"> • PEFC is becoming more active with this file. We need to ensure PEFC is talking and meeting with the influencers in this sector. • The industry association (CELCO) seems to be open to multiple forest certification programs. 	<ul style="list-style-type: none"> • Sustainable Apparel Coalition • Outdoor Industry Association • Textile Exchange
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