



BUSINESS PLAN

**ISO/TC 87
Cork**

EXECUTIVE SUMMARY

Generally speaking warrantable statistic data about the cork sector are not available what makes difficult a deep knowledge of his activity and of the market environment.

Nevertheless the partial information from the main countries producing and manufacturing cork allows stating a global economical scenery as presented hereafter.

1 INTRODUCTION

1.1 ISO technical committees and business planning

The extension of formal business planning to ISO Technical Committees (ISO/TCs) is an important measure which forms part of a major review of business. The aim is to align the ISO work programme with expressed business environment needs and trends and to allow ISO/TCs to prioritize among different projects, to identify the benefits expected from the availability of International Standards, and to ensure adequate resources for projects throughout their development.

1.2 International standardization and the role of ISO

The foremost aim of international standardization is to facilitate the exchange of goods and services through the elimination of technical barriers to trade.

Three bodies are responsible for the planning, development and adoption of International Standards: [ISO](#) (International Organization for Standardization) is responsible for all sectors excluding Electrotechnical, which is the responsibility of [IEC](#) (International Electrotechnical Committee), and most of the Telecommunications Technologies, which are largely the responsibility of [ITU](#) (International Telecommunication Union).

ISO is a legal association, the members of which are the National Standards Bodies (NSBs) of some 140 countries (organizations representing social and economic interests at the international level), supported by a Central Secretariat based in Geneva, Switzerland.

The principal deliverable of ISO is the [International Standard](#).

An International Standard embodies the essential principles of global openness and transparency, consensus and technical coherence. These are safeguarded through its development in an ISO Technical Committee (ISO/TC), representative of all interested parties, supported by a public comment phase (the ISO Technical Enquiry). ISO and its [Technical Committees](#) are also able to offer the ISO Technical Specification (ISO/TS), the ISO Public Available Specification (ISO/PAS) and the ISO Technical Report (ISO/TR) as solutions to market needs. These ISO products represent lower levels of consensus and have therefore not the same status as an International Standard.

ISO offers also the International Workshop Agreement (IWA) as a deliverable which aims to bridge the gap between the activities of consortia and the formal process of standardization represented by ISO and its national members. An important distinction is that the IWA is developed by ISO workshops and fora, comprising only participants with direct interest, and so it is not accorded the status of an International Standard.

2 BUSINESS ENVIRONMENT OF THE ISO/TC

2.1 Description of the Business Environment

The following political, economic, technical, regulatory, legal and social dynamics describe the business environment of the industry sector, products, materials, disciplines or practices related to

the scope of this ISO/TC, and they may significantly influence how the relevant standards development processes are conducted and the content of the resulting standards:

The sector is based in a product extracted from “*Quercus suber*“ a tree with a slow growing and a slow cork production which does not allow quick changes in the raw material supply. On the other hand tree needs specific ecological conditions which reduces its location to the West Mediterranean.

Cork resources are linked to an extensive and manual agricultural system.

Therefore cork is a natural product with heterogeneous components and linked to the Mediterranean wood.

The industrial sector that works this raw material is bipolar: with big and medium sized enterprises, which represent 3% of the total market and manufacture 80% of the raw material, coexist a large number of handicraft, familiar or small sized enterprises of low capital stock.

Relationship between forest producers and industrial manufactures is scarce as usually they represent closed groups with opposite interests

Manufactured product market is divided into two very different destinations, as 80% of the business is related with the drinks industry and only 20% goes to the construction and decorative sector, with completely different economical agents.

This variety and tightness inside the sub sectors requires a great characterization of products and processes and a detailed standardization in order to induce economical relationship.

2.2 Quantitative Indicators of the Business Environment

The following list of quantitative indicators describes the business environment in order to provide adequate information to support actions of the ISO/TC:

The market includes a average annual production of 320 000 T of cork in planks and 80 000 T of virgin cork what result in 800 MUS\$ for the planks and 200 MUS\$ for the virgin cork.

The final products reach 1 700 MUS\$ for stoppers and 700 MUS\$ for construction materials.

Countries producing cork are European, 85%, (Italy, France, Portugal and Spain) and, in a low scale, North African, 15%, (Morocco, Algeria and Tunisia).

Cork products consumers are spread for more than 120 countries around the world. The 20 more representative are shown in table 1.

Table 1 – Cork products consumers

Country	Total (%)
France	20,7
USA	16,5
Germany	13,2
Australia	6,1
Spain	6,1
Italy	5,8
Portugal	5,0
UK	4,4

Chile	2,9
South Africa	2,3
Austria	2,0
Switzerland	1,9
Argentina	1,3
Netherlands	1,3
Bulgaria	1,1
BENELUX	0,9
Canada	0,9
New Zealand	0,8
Greece	0,7
China	0,6

In physical terms the cork stoppers market reaches about 20 000 M units/year with the distribution ratio shown in tables 2 and 3.

Table 2: World estimative production of cork stoppers for still wine

Cork stopper type	Number (million of units)
Natural	4 100
Covered	5 300
Agglomerated	4 800
Agglo + natural 1+1	2 000
Special Agglo	500
Agglo + 2 natural pieces	1 000

Table 3: World estimative production of cork stoppers for sparkling and gasified wine

Cork stopper type	Number (million of units)
Compound (agglo + natural)	1 500
Agglomerated	900

Construction cork products are quoted as follows:

Floor coverings	8 000 000 m ²
Decorative rolls	1 500 000 m ²
Insulating material	25 000 m ³
Others	1 000 T

3 BENEFITS EXPECTED FROM THE WORK OF THE ISO/TC

With his work TC 87 wishes:

- to fight the misusing of the term “cork” by the plastics and the imitation of natural cork by synthetic products;
- to improve the consumers information in order to optimise the requested kind of cork stopper;
- to strengthen the cohesion among the different producing sub sectors;

- to increase the information flow and statistic studies for the cork sector;
- to promote the planting of “*Quercus suber*” as well as the protection and production of the existing cork forest;
- to make transparent the market for cork manufactured products;
- to enlarge the world knowledge of the technical and sanitary characteristics of the cork products;
- to improve the industrial production systems;
- to promote standardization in the North Africa countries;
- to elaborate specific quality monographs for each cork product;
- to state analytical test methods to each cork product;
- to state the transport, labelling and identification requirements for each cork product and its manufacturer;
- to establish the requirements related with the raw material origin;
- to prepare a Code including the best practices to produce, treat and manufacture cork products.

4 REPRESENTATION AND PARTICIPATION IN THE ISO/TC

4.1 Countries/ISO members bodies that are P and O members of the ISO committee

4.2 *Analysis of the participation*

There are 4 participating member bodies in ISO/TC 87.

Producers, manufacturers and the main consumers of cork products as well as the technical and scientific entities are represented in the national technical committees of the corresponding 4 countries.

They are developed countries.

The absence of the North Africa seems to be a result of a lack of sensibility of this world area for the activity of ISO in the cork sector. In opposition some great consumers claim economic difficulties to pay the fee to the national member body.

In some countries, with low cork culture, trade is located to enterprises with low interest for standardization, which do not support, or afford, the participation in the international or national standardization.

TC 87 is in liaison with 6 organizations, being two of them liaisons A (CE-liège, UIO, CETIE, EC, FAO, and WCO). It is felt that something more should be done.

Contacts will be developed to create new liaisons and to induce member bodies from North Africa to become participating members in TC 87.

5 OBJECTIVES OF THE ISO/TC AND STRATEGIES FOR THEIR ACHIEVEMENT

Based on the considerations above, ISO/TC 87 proposes the objectives and strategic directions for its future work hereafter stated

5.1 *Defined objectives of the ISO/TC*

ISO/TC 87 intends to develop, economising resources as much as possible, International Standards within the scope of TC , in order to:

- Facilitate the cork and cork products world trade;
- Promote the quality of the cork and its products;
- Protect the health of the cork products consumers;
- Promote the safety of the products and industrial processes in the cork field;
- Promote the application of advanced industrial technology;
- Promote the defence of the word cork against the non renewable synthetic alternative products;
- Promote the technical characteristics of cork against the synthetic products;
- Integrate the producing processes in a Good Practice Code to be used during production, manufacturing, trading and consuming of cork products.

5.2 Identified strategies to achieve the ISO/TC's defined objectives

TC 87 will use the following strategies to satisfy the preceding objectives:

- Set priorities and schedules in elaboration of the International Standards included in TC work programme and revision of this one at each plenary meeting, in order to withdraw or redefine those drafts on which no progress has been made between two meetings (planned every 18 months) and to identify items for future work (first priority to nomenclature and terminology);
- Nominate, for each work item, a project leader responsible for the drafting of the document and for including all changes agreed by TC 87 members (during the different stages until the publication of the International Standard);
- Continue liaison with:

CE-liège	Confédération Européenne du liège
UIO	Union Internationale des Oenologues
CETIE	Centre Technique Internationale de l'Embouteillage
FAO	Food and Agriculture Organization of the United Nations
EC	European Commission
WCO	World Customs Organization

- Contact some identities to settle new liaisons (OIV, Consumers associations and WWF);
- Promote, as much as possible, works by correspondence and electronic means of communication, as well as using the ISO/TC Server tool;
- Create a working group to study and draft the International Code of Good Practice;
- Create a working group to study new cork products;
- Start the studies on the waste of the industrial activity.

6 FACTORS AFFECTING COMPLETION AND IMPLEMENTATION OF THE ISO/TC WORK PROGRAMME

TC 87 considers that the following aspects affect the completion of the work programme:

- Short number of "P" members in TC 87;
- Slow process for elaboration of ISO Standards;
- High costs of the research and experimental work to support standardization;
- Lack of financial reward what results in a unavailability of experts; they have to work with benevolence;
- Enterprise passiveness for the standardization.

7 STRUCTURE, CURRENT PROJECTS AND PUBLICATIONS OF THE ISO/TC

This section gives an overview of the ISO/TC's structure, scopes of the ISO/TCs and any existing subcommittees and information on existing and planned standardization projects, publication of the ISO/TC and its subcommittees.

7.1 [Structure of the ISO committee](#)

7.2 [Current projects of the ISO technical committee and its subcommittees](#)

7.3 [Publications of the ISO technical committee and its subcommittees](#)

Reference information

[Glossary of terms and abbreviations used in ISO/TC Business Plans](#)

[General information on the principles of ISO's technical work](#)