



Welsh Softwood Timber Supplies and Our Green Economy

International Pavilion, Royal Welsh Showground, Llanelwedd
14th October 2014

Summary

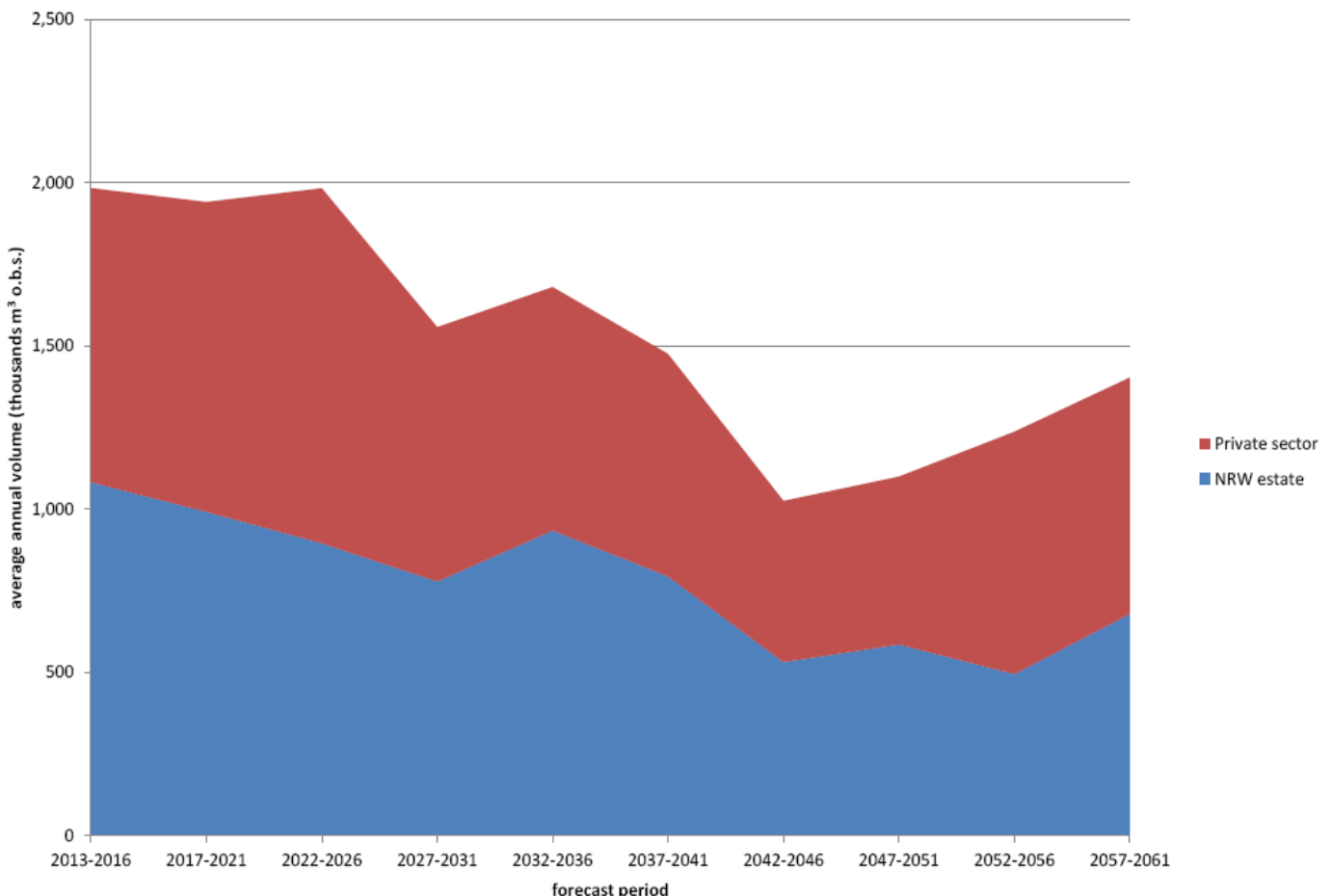
The publication of the 50 year timber supply forecast has highlighted a sharp decline in the supply of Welsh timber in the medium term.

As the Welsh Government (WG) is committed to developing the Welsh economy based on “green growth” it called upon the forest industry in Wales to consider and evaluate the problem and report back to WG with advice on how to respond. Consequently Confor and the Wales Forest Business Partnership organised an event on behalf of WG at which the forest industry could collectively consider the implications of the supply forecast and advise WG on the necessary actions it could take to prevent the industry falling into decline with the adverse effect that would have for the Welsh “green economy”.

The event attracted 60 representatives from across the whole forest industry sector including growers, processors, research academics, WG policy advisors and the managers of the WG forest estate.

Presentations were made on the supply forecast, the likely demand for timber and the implications for the forest industry.

Wales – Softwood Availability by Sector (Graph of availability by courtesy of NFI Forestry Commission)



With regard to the forecast itself, there was unanimous agreement that there would be a significant dip in the supply of timber in the medium term (commencing circa 2025) which will significantly impact on the Welsh economy. The length and size of the dip is less predictable and work needs to be done to improve the quality of the data; but it was stressed that such work should not delay urgent remedial action as the mitigating effect of such actions will decrease exponentially over time.

To safeguard the industry and employment action needs to be taken now to restore confidence.

The forecast for timber demand is an upward curve driven by two significant factors:

1. The pressure on wood supplies world-wide as wood is recognised as a sustainable alternative to materials that are derived from high carbon producing processes such as bricks, concrete and steel.
2. In Wales the requirement for wood fuel is forecast to increase from 100,000 tonnes per annum in 2009 to 546,000 in 2020.

[Source: Forestry Statistics 2009](#)

On considering the implications for the forest industry it was pointed out that just to replace the productive forested area that has been lost by not being restocked with commercial conifers would require the compensatory planting of an estimated 35,000 hectares. It is considered that there are only approximately 200,000 hectares of land available for productive forestry in Wales which will not be contested by other interest groups.

[Source: WFBP](#)

The conference Chair, Roger Cooper, set a challenge to the conference workshops; to agree on conclusions and recommendations that the forest industry could present to Welsh Government which would help to alleviate the consequences of the forecast decline in supply.

The key conclusions and recommendations that the workshops made were:

Conclusions

- Overwhelming conclusion of all workshops was the need to substantially increase the planting of commercial conifer species in the short term.
- The reduction in timber supply is due to reduced levels of productive conifers at restock and virtually no conifer planted under woodland creation.
- The falloff in projected supply will deter wood processors from investing in Wales and threaten jobs.
- The Welsh public and NGO's are poorly educated as to the benefits of commercial forestry managed under the UK Forestry Standard (UKFS); benefits that enhance native biodiversity, mitigate against climate change, create recreational facilities and provides a renewable resource with the economically sustainable use of marginal land.
- Woodlands for Wales the WG strategy for forestry in Wales is not being delivered.

Recommendations

- WG should place emphasis on educating the wider society to the benefits of commercial forestry.
- Ensure that felling in Wales is conducted sustainably i.e. that productive forests are sustainably restocked with productive species supported by Glastir.
- Promote and facilitate commercial woodland creation (under UKFS) on marginal land using a quicker and simplified approval process.
- Ensure that in the management of commercial woodlands on the WG forest estate the value of productive woodland is recognised and protected.
- Woodlands for Wales must be delivered in a balanced way without bias towards the elements which threaten the future of sustainable forestry in Wales.

