

# The Woodknowledge Wales Manifesto for Wood

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Front cover image: Burry Port School ©Architype/Leigh Simpson Photographer

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WALES

# Foreword

A thriving wood industry is an essential cornerstone of a sustainable society. That was true in the past and it is certainly true today. The sector provides a valuable low carbon resource for industry and rewarding employment for many thousands of people. Well managed woodlands contribute to climate change mitigation, flood prevention, soil health, clean air, biodiversity and enables many forms of recreation necessary for our health and well-being.

Using more wood, using more homegrown wood and growing more trees is good for our economy, our environment and our people. Expansion of the forest sector is not simply an opportunity; we believe it to be a necessity.

The characterisation of sector expansion as being a battle between industry and a healthy environment is false. Trees and wood are necessary for both. Our challenge is to communicate a compelling vision of the possible and help inspire a durable movement capable of delivering the necessary change.

Wales has a strong cultural and practical heritage in forest products. We have a structurally diverse processing sector across the value chain from wood-based panels to fence posts and everything in between.

We have many joinery companies and a growing timber frame sector. Bangor University educated wood scientists and foresters are in senior positions all over the world. Our wet and warm climate is ideal for growing many commercially desirable types of timber.

We have a solid foundation to build upon, but there is a lot more we can do. Our forest cover is only 40% of the European average and we are struggling to plant sufficient trees to maintain existing processing let alone grow the sector. Only 15% of the timber we use in construction is grown in the UK. The UK is the third largest importer of wood in the world. We urgently need to build many more houses and most of the efficient, low carbon and high performance housing throughout the world is based upon wood.

Woodknowledge Wales will harness the collective spirit of business and sector organisations to put trees, timber processing and wood products at the heart of the green growth agenda in Wales. Our ambition is to help increase the market for wood, find ways to use wood better, and increase the supply and value of the homegrown resource.

We believe that no opportunity should be left unexplored in the pursuit of sustainable sector growth. This ambitious manifesto seeks to describe what needs to be done and some of the benefits we believe we can deliver.

Not everything can be achieved overnight. But we must challenge ourselves to work together to move from an industry shaped by the needs and context of the past and embrace the substantial and ever evolving opportunity for the future.

## Our mission

*To champion the development of wood-based industries for increased prosperity and well-being in Wales*



## Wood – the big opportunity

The forest products sector is a high value, high growth opportunity. It's not widely understood that the value of all wood-based businesses in the UK is around £25 billion making it the UK's 5th largest industrial sector. It is an industry worthy of sustained policy focus. In terms of our forests, the economic contribution from recreation and tourism are increasingly valued. But what value should we attach to the contribution of trees to flood management, health, air pollution, water management, climate change mitigation and biodiversity?

## A forum for collaboration and action

By bringing a diverse range of organisations together within a single alliance, Woodknowledge Wales will create a collaborative network of organisations, from growers to customers, to facilitate information exchange, joint ventures and collective action.

We seek to attract membership, supporters and delivery partners from throughout the forestry and timber value network – including architects, clients, developers, engineers, processors, product manufacturers, distributors, contractors, growers, government agencies, academia and trade bodies as well as sustainability and charitable organisations.

## Our forest industries

Scotland has set a target to double the value of their forest sector over the next 10 years. Our research suggests that we can be equally ambitious in Wales. But whatever target we set ourselves, it will be our forest industries and rural businesses that will be responsible for delivery. It is therefore vital that the sector is valued and appropriately resourced. This means a focus on markets, skills, technical capacity and innovation.

Woodknowledge Wales supports the call for a new study on the economic impact of forestry and forest products in Wales, to capture the scale of the opportunity and reinforce the case for strategic sector expansion. In short, we need an industrial strategy for wood

Woodknowledge Wales will create and inspire a collaborative network of members, supporters and delivery partners through development projects, conferences, workshops, CPDs, an informative website, a monthly e-newsletter and an active social media presence

Woodknowledge Wales exists to support the whole wood sector from forest to customer. The new funding model will enable us to work closely with member organisations to provide support services which will include training, technical advice, knowledge transfer and trade visits



## Wales - a great place to grow trees

The wet and warm Welsh climate is great for growing trees. Previous Woodknowledge Wales reports describe what's possible and highlights the opportunity. In recognition of the environmental and economic benefits of woodland expansion the Welsh Government has proposed a target of planting 100,000 new hectares of forest by 2030.

If this ambitious target is reached it would increase the area of woodland in Wales from 14.8% to 20% - which is still only just over half of the European average forest cover of 37%. A radical change of pace of new planting is required.

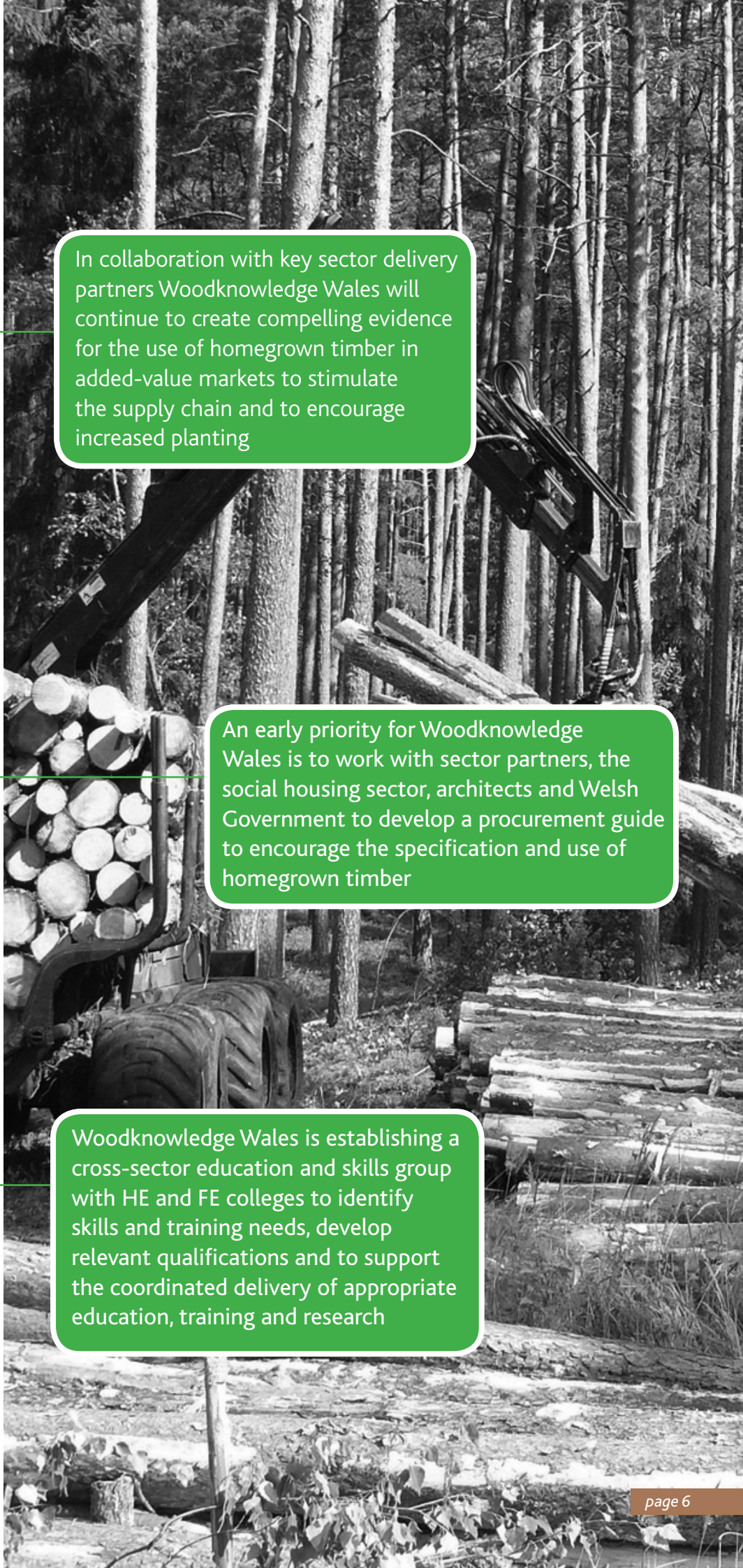
## Wood and the urgent need to build

Different and better development models are urgently needed to ensure that we get the number, diversity and quality of new homes we desperately need through public, private and third sector provision. New approaches such as 'custom build' can create real choice for the consumer and lead to better outcomes. But timber housing in Wales is currently less than 25% of new build. Woodknowledge Wales has adopted the aspiration to match that of Scotland where timber frame accounts for over 75% of the new build market.

A regulatory and planning focus upon higher performance, healthier internal environments, embodied carbon reduction and social value will all help stimulate demand for wood.

## People and skills

Skilled people are required to deliver the high performance, low carbon buildings we need. Modern timber building is increasingly a high skill manufacturing and assembly industry. Given the accelerating pace of change and the UK's poor recent history in skills development when compared to continental best practice, we believe that a new approach is necessary. Woodknowledge Wales believes that a timber training academy is urgently needed to provide business support, promotion of the sector, education and training through the entire supply chain from the forest to the product.



In collaboration with key sector delivery partners Woodknowledge Wales will continue to create compelling evidence for the use of homegrown timber in added-value markets to stimulate the supply chain and to encourage increased planting

An early priority for Woodknowledge Wales is to work with sector partners, the social housing sector, architects and Welsh Government to develop a procurement guide to encourage the specification and use of homegrown timber

Woodknowledge Wales is establishing a cross-sector education and skills group with HE and FE colleges to identify skills and training needs, develop relevant qualifications and to support the coordinated delivery of appropriate education, training and research



## Innovation and capacity building

In recent years, there has been insufficient investment in timber research and development in the UK. The technical possibilities of wood and the demand and context for trees does not stand still, and nor should we. Guided by our commitment to innovation and wood science, Woodknowledge Wales has supported the development of many new products from homegrown timber - such as Brettstapel structural panels and PassivHaus windows.

We will continue to support the innovation needs of the sector and of our members.

## Wood for well-being

Public sector, third sector and increasingly private sector clients are interested in maximising the social value of investment. In Wales the Well-being of Future Generations (Wales) Act requires public bodies to think more about, and report on, how their decisions will improve the economic, social, environmental and cultural well-being of Wales. We believe that this new Act represents a considerable opportunity for the future development of our wood industries.

**For more jobs, higher skills, lower carbon and better homes we need a strong integrated forest industry and more wood**

To join, get involved or to find out more please complete the form on the back cover or contact us at:

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**[www.woodknowledgewales.co.uk](http://www.woodknowledgewales.co.uk)**

Woodknowledge Wales will develop formal links with research providers and other sector organisations with the aim of securing research funds from a range of national and international sources

Woodknowledge Wales will seek to capture and report the social value of the forest sector and of member companies in a way that can be understood and valued by customers in Wales and beyond

## About Woodknowledge Wales

Woodknowledge Wales was established 10 years ago as an initiative of the Wales Forest Business Partnership. We are now constituted as an independent member-funded organisation formed from an amalgamation of the Welsh Timber Forum and the Wales Forest Business Partnership. Our purpose is to support the development of companies and organisations involved in the supply, demand and use of wood in Wales.

### Woodknowledge Wales will:

- *Support the technical and market development of the forest industries sector through research, development and promotional activities*
- *Expand a collaborative network of members, supporters and delivery partners to facilitate information exchange, joint ventures and collective action*
- *Support the development of the skills base essential to drive sector growth*
- *Be an industry 'think tank' and provide a reference group for Welsh Government and agencies to identify strategic opportunities and threats to growth*
- *Create a Welsh focus for sector development activities initiated by national and international wood sector organisations*
- *Look outward to other regions of the UK, Europe and beyond to forge knowledge sharing and collaborative partnerships*
- *Undertake and communicate leading research*

## Compelling reasons to get involved

Our activities will continue to be focused upon market development, capacity building, technical support and skills provision within the sector. Guided by an expanding and collaborative network of members, supporters and delivery partners, Woodknowledge Wales will help to inspire a movement capable of leading a dramatic expansion of the forestry and wood using industries in Wales.

### The benefits of joining and supporting:

- *Show leadership and commitment to developing forestry and forest industries*
- *Promote your organisation at events, trade shows and in marketing materials*
- *Influence the organisation's strategy, actions and governance*
- *Influence government policy*
- *Network and collaborate with clients, customers and suppliers within the membership*
- *Become a partner in funded R&D projects*
- *Receive technical support and training opportunities*



## Building upon 15 years of sector development experience

It has long been understood that a strong and integrated forest and wood sector in Wales requires a leadership group drawn from within the sector.

Since the early 2000s committed Welsh companies, organisation and individuals have worked together to provide this sector development and coordination function. In recognition of the need for this activity, funds were provided from the Forestry Commission and Welsh Government.

The new member-funded Woodknowledge Wales will seek to build on past knowledge and experience whilst delivering the new activities and services outlined in this Manifesto for Wood.

Key sector development resources continue to be available on our popular website.

### Recent reports include:

Homegrown Timber in UK Construction - Case Studies  
<http://bit.ly/1Np7313>

Welsh Softwoods in Construction, revised edition  
available 21/03/2016

Welsh Softwoods in Construction, 2013  
<http://bit.ly/1RrGrbx>

Brettstapel - adapting techniques for utilisation of homegrown timbers in Britain  
<http://bit.ly/21FFKG4>

Japanese Larch and its innovative applications in construction  
<http://bit.ly/1QtpXTO>

Japanese Larch in Wales  
<http://bit.ly/1TqLHLQ>

Growing a Thousand New Forestry Jobs in Wales  
<http://bit.ly/21JbrLf>

Coed y Brenin Visitor Centre Extension - a Case Study  
<http://bit.ly/1QU53iq>

Sustainable Construction with Timber in Wales  
<http://bit.ly/1QV7emd>



# Membership form

Contact Name .....

Organisation .....

Contact details .....

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## Member rates

<i>Status / Turnover</i>	<i>Member annual rate</i>	<i>Please tick</i>
Business (>£250k)	£150	<input type="checkbox"/>
Business (> £1m)	£300	<input type="checkbox"/>
Business (>£5m)	£500	<input type="checkbox"/>
Business (> £10m)	£750	<input type="checkbox"/>
Business (£10m +)	Fees on application	<input type="checkbox"/>
HE and FE Institutions	Fees on application	<input type="checkbox"/>
Client group (LA, RSL, developer etc.)	Fees on application	<input type="checkbox"/>
Supporter	Fees on application	<input type="checkbox"/>

Please complete and return this form to your  
Woodknowledge Wales contact