

# Home Grown Homes: 2050 Vision for Welsh Timber

## Workshops Report

### Introduction

This report summarises the results of a series of workshops which assessed the desirability, feasibility and actions required for a future in which Wales achieves a step change in wood based housing, wood processing and home grown timber supply.

The Workshops, delivered in May June and July 2017, as part of the Powys driven Home Grown Homes project, engaged with 70 decision makers from across the timber supply chain, from housing providers and architects, through wood processors and builders, to foresters, land owners and farmers.

Using its “future-casting approach”, Forum for the Future (and Welsh consultancy RES) helped Woodknowledge Wales to guide delegates through a future scenario where 75% of houses in Wales are based upon wood, with 75% of that wood processed within Wales and sourced from Welsh forests or woodlands. In each case, this represents at least a doubling of current capacity, with benefits across the economic, environmental and social fabric of Wales. Across the workshops, this vision was embraced as both possible and highly desirable, with widespread engagement identifying key actions required to achieve this positive change and to overcome a range of challenges along the way.

### Current Situation

Forestry is a key part of the identity of Wales, a land of lakes, mountains, forests and independent communities. Wood increasingly represents a key, renewable, resource for building, fuel employment and the rural economy. After a sustained period of house building characterised by “brick and block”, the challenges of adequate housing supply are increasingly being met in Wales by timber frame housing which has increased from a quarter of housebuilding to a third, in the last five years.

The picture for domestic supply is currently less rosy, with the UK as a whole, being the third largest timber importer in the world, and availability of commercial softwoods in Wales forecast to fall by 45% over the next 30 years. This is likely to exert unwelcome pressure on the processing sector in Wales, with imported wood products capturing an increased share of volume in addition to their current higher unit values.

### The Case for Change - Trends

The workshops considered both the ample evidence of rapid changes in society and direct impacts on housing needs, rural economy and technology. The emerging challenges, for housing of an ageing population and climate change are increasingly conducted under the spotlight of social media and “radical transparency”, often un-curated. Alongside rural depopulation and a decline in traditional skills, these challenges will require fresh approaches from the wood supply chain. Examples from Scotland, where wood based construction, accounts for 76% of new housing, together with rapid adoption of both new technologies (including automated production, remote monitoring and new wood technologies) and business models (Uber, AirBnB, L&G wood based rental property) suggest that future options may be more widely available than current and past practice might sometimes suggest.

### 2050 Vision - Opportunity

The vision of a vibrant Welsh timber supply chain in 2050, was presented by Woodknowledge Wales, with healthy high-quality housing delivered by locally sourced and processed timber. This was subsequently tested against wider evidence and delegates experience, with an overwhelming view that the vision was achievable and that the ambition might be usefully delivered in a shorter timescale, subject timber supply responding in time.

## 2050 vision (continued)

The availability of new wood technologies and markets (including engineered timber, wood based co-products such as insulation, wood fuel and wood based chemicals) is expected to create new options for an efficient “systems based” approach, collaboratively optimising the value of wood products and in turn, the trees that they come from. This in turn delivers value to national and regional economies and employment, encouraging more processing and woodland creation with additional benefits for flood control and climate management. These benefits, recognised in re-balanced procurement, also contribute to a wider wood culture, supported by education, demonstration projects and research accessible to the Welsh public.

## Challenges

The road to this bright future will not be without its challenges, with delegates pointing to a fragmented industry, overly reliant upon support from the public sector, to which it struggles to argue its case against a backdrop of public attitudes to forestry which appear to presume that commercial forestry is at odds with their priorities of conservation, amenity and biodiversity. Supply capacity, is threatened by pests, diseases and lack of investment in infrastructure, with supply of sufficient labour, particularly skilled dwindling, in part due to rural de-population. These multiple uncertainties, weigh heavily upon a supply chain with a high percentage of SMEs and act as a discouragement to new investment, with further barriers to growth and innovation from a range of regulation which inhibits new planting and plays to “business as usual” from large suppliers in products and building.

## Actions

The workshops identified specific actions, across building procurement, timber supply and optimising the supply chain, incumbent upon the participants and others, required to deliver the compelling vision of 2050.

- **Enhanced Procurement of Wood Based Buildings**
  - Revised weightings, more 3 and 4 storey buildings, and “innovative housing”.
  - Driven by fabric first, material performance, health and value/quality standards
  - Address skills availability and supply agendas for housebuilding
  - Drive investment in timber, processing and skills
  - Regional targets and engagement with end users (estate agents/buyers)
- **Improved Supply Chain - R&D, Delivery and Demonstration**
  - Centre of Excellence – delivering R&D, education and demonstration
  - Supply hubs – collaborative working and strengthen role of SMEs
  - National Housebuilding competition and demonstrations
  - Best practice guides including pattern books and standardised approaches
  - Natural Capital protocols
- **Improved Timber supply**
  - Encourage more planting – post Brexit better use of land, including farms and less obstacles
  - Financial Innovation – integrated model investing in quality supply at landscape scale
  - More management –of unmanaged and local authorities, including new community woodlands (for both amenity and useable timber output, for community use)
  - Resilience of Woodland – species to sustain supply, water management and biodiversity
- **Public Engagement**
  - Hearts and Minds campaign to demonstrate benefits of Forestry to public, government and NGOs
  - Forestry and wood on curriculum from school to universities and industry apprenticeships.

## Next Steps

Woodknowledge Wales will convene a series of follow up meetings to address the actions above, with those proposing them or upon whom they are incumbent. A road map for their delivery, will be created and integrated with other current initiatives and any additional opportunities as they evolve.