



Llywodraeth Cymru  
Welsh Government



# Making Wood Work for Wales

## The Welsh Government's Timber Industrial Strategy

## **Ministerial Foreword and Introduction**

Managing forests sustainably, for timber production, helps reduce net carbon dioxide emissions. When the trees are harvested, carbon locked up while they were growing remains stored in the timber. Using timber in buildings and other long-term uses, such as furniture, keeps that carbon locked away. Meanwhile the harvested crop of trees is replanted, locking up more carbon and the cycle continues.

There is real potential for Wales to increase and add value to our home-grown supply of timber and to reuse and recycle more timber and wood fibre. This creates opportunity for foresters, timber processors and manufacturers in Wales to contribute to a 'wood economy'. Opportunities can flow right across the supply chain, from forest nurseries through planting, management, harvesting, milling to designing and constructing end products that continue to lock-up carbon for years after the timber has left the forest.

I am proud to be publishing Wales's first Timber Industrial Strategy which will boost planting, harvesting, restocking and increase processing capacity, alongside growing the skilled workforce needed to rapidly scale up supply. There is a real momentum to drive forwards and increase the scale and value of timber grown in Wales and timber products produced in Wales. As the world looks to achieve net zero, timber and wood fibre can make an immediate and important contribution to the materials transition needed to decarbonise.

This strategy is focussed on increasing timber production from Welsh forests and increasing added value through processing and manufacture of wood products. We have good examples of this in practice in Wales with initiatives like Tai ar y Cyd, which promote standardised, offsite-manufactured net-zero timber homes, providing a major opportunity to mainstream C16 and other Welsh-grown timber products. Public procurement, combined with design innovation and performance validation, can shift perception and catalyse demand. The more timber is specified into construction, the more secure the forest industries' future becomes – supporting new investment, jobs, and carbon outcomes.

With demand for timber globally expected to quadruple by 2050 we need to secure a reliable and sustainable future timber supply requiring us to grow more Welsh timber, alongside increasing re-use and circular uses, balanced with importing in a globally responsible way. Wales's remarkable recycling progress since devolution means that we are already world class in capturing materials to go back into the economy. There is already a healthy market for recycled wood fibre and potential to reclaim more timber than currently retrieved, for example from demolished buildings.

In delivering this strategy we need to face up to the twin challenges of a climate and nature emergency and risks posed by more frequent extreme weather events such as the storms we experienced over the winter, drought, flooding and wildfire. Trees are also threatened by pests and pathogens. It is important that the forestry sector plans for these areas of risk to ensure sustainability of the sector, especially given the relatively long-term planning cycles involved.

The Timber Industrial Strategy sets out actions to future-proof our forests including through choosing species that will be productive in the future and ensuring access to genetically diverse and climate-appropriate stock. We need a reliable supply of forest

genetic materials, including seed orchards, and sufficient capacity in forest nurseries. This way, we can ensure our timber forests, and all the jobs that rely on them, are secure and resilient.

With more skilled workers needed to meet woodland creation targets and expand the production of quality Welsh timber to fulfil the growing demand for low carbon timber-framed social homes, prompt action is required to address the shortfall. The forestry, timber and advanced manufacturing sectors offer a huge range of opportunities for varied careers and high-paid jobs. Urgent action is needed to support industry to improve recruitment and retention of an appropriately skilled, diverse and flexible workforce that can adapt to change. Our expanded Flexible Skills Programme includes the Forestry and Timber sectors, meaning that businesses are better able to address skills gaps and upskill their workforce. This strategy proposes further actions to grow a strong, resilient and progressive forestry sector.

At the core of this strategy is a sense of working together to overcome the challenges and to seize the opportunities to support local supply chains to boost the potential value we gain from our timber, all the way from forest to product. I am keen for our forests to be in active, sustainable and diverse use, providing economic, environmental, social and cultural benefits to the people of Wales for many centuries to come and this strategy will play a key role in that.

Huw Irranca-Davies, MS, Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs, July 2025.

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## 1. Priority 1 – Increasing Timber Supply

### 1.1. Where are we now

- 1.1.1. The UK currently imports much of our timber. Wales offers favourable growing conditions for many productive species, both softwood and hardwood. However, the resources provided by our Welsh woodlands are currently underutilised. Demand is increasing with the drive to deliver low-carbon, high-performance materials needed to meet Welsh housing needs, yet Welsh timber processing is currently misaligned with demand, particularly for structural construction products.
- 1.1.2. To secure a reliable source that is fit for purpose for the future, in the face of increasing pressure on global markets, Wales must take steps to increase sustainable yields of Welsh-grown timber and wood fibre. Current forecasts<sup>1</sup> are showing a continued drop in future timber yields, therefore we need to use a combination of afforestation and increasing productivity from existing forests to increase sustainable yields of timber to meet future demand and mitigate risks to timber security.
- 1.1.3. Under the Well-being of Future Generations (Wales) Act 2015<sup>2</sup>, the statutory description of the ‘Prosperous Wales’ goal specifically refers to ‘innovative, productive and low carbon’ and a Wales that ‘uses resources efficiently’ and ‘recognises the limits of the global environment’. Continuing the momentum we already have in Wales towards circularity of use will expand the lifespan of our timber and wood fibre resource. Our home-grown resource will be balanced by importing in a globally responsible way.

### 1.2. Overview

- 1.2.1. Trees offer a wide range of benefits beyond carbon sequestration and storage and timber production. Our woodlands provide vital ecosystem services that deliver measurable public and ecological benefits. These include enhancing biodiversity, connecting habitats, stabilising soils and reducing erosion, improving soil filtration and regulating water flows helping prevent flooding. Trees achieve health benefits through improving local air quality and cooling effects. Woodlands are enjoyed by many for leisure and recreation, offering locations for physical exercise and access to nature, which can bring mental health and wellbeing benefits<sup>3</sup>.
- 1.2.2. Trees provide shelter and shade for livestock and provide an additional source of income for farmers through the sustainable harvesting of timber and non-wood forest products and via applications such as agroforestry.

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<sup>1</sup> [Timber Industrial Strategy Data Annex](#) (p24)

<sup>2</sup> [Well-being of Future Generations \(Wales\) Act 2015](#)

<sup>3</sup> [Valuing mental health benefits of forests - Forest Research](#)

- 1.2.3. Forest Research prepared an Evidence Annex<sup>4</sup> to support this strategy, collating the available data for Wales. Here is some headline information, further detail and tables can be accessed in the Evidence Annex.
- 1.2.4. Woodland area, as defined by the National Forest Inventory (NFI), has increased in Wales since 1990, now standing at 15% of land cover in Wales in 2024. As of 2024, broadleaf woodland in Wales exceeds coniferous, representing 55.4% of total woodland area.
- 1.2.5. The Welsh Government Woodland Estate (WGWE) is managed on behalf of the Welsh Minsters, by Natural Resources Wales (NRW). The area of public woodland has decreased since 1990 to 115 thousand hectares, remaining consistent in recent years, including provisional figures for 2024. Privately owned woodland has increased to 197 thousand hectares, according to 2024 provisional figures. The increase is due to both planting and purchase of woodland previously under public ownership.
- 1.2.6. By 2023, softwood production in Wales has increased by nearly 65% since 1990, however production has been higher than it is currently in some intervening years. Hardwood production in Wales, at 2023, has decreased by 47.1% since 1990 but is currently higher than in some intervening years.
- 1.2.7. As of 2023, approximately 95% of timber produced in Wales comes from conifers. In 2023, 42% of the softwood timber produced in Wales went directly to sawmills and fencing within Wales. Softwood availability is expected to decrease and hardwood timber available from broadleaf trees to increase in Wales from 2022 to 2046. Forest Research is currently preparing the next release of their 50-year production forecast.

### 1.3. Woodland Creation

- 1.3.1. The UK Tree-planting Taskforce<sup>5</sup>, chaired by UK Forestry Minister, Mary Creagh, met for the first time in November 2024. Ministers from all four UK nations sit on the taskforce, with Wales being represented by Huw Irranca-Davies MS, Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs.
- 1.3.2. The Taskforce will strengthen collaborative working across the UK to improve tree planting and ensure the long-term survival of woodlands, ensuring their benefits for future generations. Although trees and forestry are devolved matters, there are some shared challenges. This forum provides an opportunity to work together, share good practice and solve common issues in support of our tree planting targets and tackling the climate emergency.

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<sup>4</sup> [Timber Industrial Strategy Data Annex](#)

<sup>5</sup> [Written Statement: First Meeting of the UK Tree Planting Taskforce \(19 December 2024\) | GOV.WALES](#)

1.3.3. Wales has a Trees and Hedges Stakeholder Group. It is a voluntary group providing advice and support to Welsh Government on delivery of targets for tree planting and hedgerow creation in Wales, balanced against other key land-use and wider socio-economic and cultural objectives. The group will also consider approaches to the on-going maintenance and management of trees and hedges as key elements of Wales' natural capital. Members include representatives from government, the farming industry, the forestry sector, environmental non-governmental organisations, the scientific community, and other major landowners.

1.3.4. Welsh Government is committed to delivering the Sustainable Land Management Objectives set out in the Agriculture (Wales) Act 2023<sup>6</sup>. Wales also has significant commitments in relation to the nature and biodiversity crisis under the Global Biodiversity Framework<sup>7</sup> and through the forthcoming Environmental Governance, Principles and Biodiversity Targets Bill<sup>8</sup>.

1.3.5. In 2018, the Ministerial foreword of "Purpose and Role of the Welsh Government Woodland Estate"<sup>9</sup> set out key principles including that the woodland area on the estate should be bigger in 25 years. This document identifies the importance of maintaining, and where appropriate enhancing, the overall productive potential of the WGWE. It also prioritises the need to carry out compensatory planting to mitigate permanent loss of woodland due to management actions. NRW is currently successfully delivering against targets for compensatory planting.

1.3.6. Done in the right way, tree planting and hedgerow creation can positively support all the objectives and commitments set out above.

#### 1.4. Woodland Management

1.4.1. Forest management optimises tree growth and when it adapts to current and future site and environmental conditions, can support forest health and the resilience of the timber supply<sup>10</sup>. It also provides good, long-term jobs in rural areas.

1.4.2. Maintaining our existing woodlands is a crucial area of opportunity. There are large areas of currently unmanaged broadleaf and farm woodland in Wales. Although not all of this woodland is suitable for market-orientated management, collectively it represents a real opportunity to increase production of usable timber in response to

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<sup>6</sup> [Agriculture \(Wales\) Act 2023](#)

<sup>7</sup> [Kunming-Montreal Global Biodiversity Framework](#)

<sup>8</sup> [Introduction of the Environment \(Principles, Governance and Biodiversity Targets\) \(Wales\) Bill \(2 June 2025\) | GOV.WALES](#)

<sup>9</sup> [Purpose and Role of the WGWE](#) 2018, p.2

<sup>10</sup> [Timber and Decarbonising Wales - Woodknowledge Wales 2025](#)

increasing demand and thereby support the development of smaller businesses<sup>11</sup>.

- 1.4.3. Under the Sustainable Farming Scheme (SFS) all farmers will be paid to maintain their existing woodland as a Universal Action according to certain management requirements. If they wish to go further there will be support for more proactive woodland management under both the Optional and Collaborative layers of the scheme. Similar support will be available for other landowners outside the scheme.

## 1.5. Restocking

- 1.5.1. Restocking is the replacement of trees on areas of felled woodland by both replanting and natural regeneration. Looking only at the restocking of publicly owned woodland and grant aided restocking of private woodland, 1.58 thousand hectares of woodland was restocked in Wales in 2023/24<sup>12</sup>.
- 1.5.2. We need to ensure that restocking, of private and public forests, maximises production whilst delivering other UKFS criteria. Maximising production in our existing forest structure could have a significant impact on future timber supplies, bringing quicker results to complement longer-term woodland creation.
- 1.5.3. On the WGWE the restocking and woodland creation programme being carried out by NRW requires a reliable supply of young trees. In 2021, NRW entered a long-term contract with Maelor Forest Nurseries Ltd to guarantee appropriate supply of an estimated 30 million trees for re-stocking and woodland creation on the WGWE between 2022/23 – 2030/31<sup>13</sup>. This provides much needed certainty of supply to facilitate timely and appropriate restocking.
- 1.5.4. Assumptions based on performance to date inform the length of time for fallow periods as part of Forest Research's work on the 50-year production forecast to be published in 2025. The assumption for the private sector is 12 months and NRW has set it at 3 yrs for the WGWE. Decisions are site-specific, with fallow periods determined after considering a balance of factors, including NRW's overall chemical reduction strategy (pest and weed control), the ground preparation programme, plant supply and contractor availability.

## 1.6. Health and Safety

- 1.6.1. The combined agriculture, forestry, and fishing sector has the highest rate of workplace injury in Great Britain, with a fatality rate 21 times

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<sup>11</sup> [Woodlands for Wales](#) 2018, p.33

<sup>12</sup> [Timber Industrial Strategy Data Annex](#)

<sup>13</sup> [Natural Resources Wales / NRW announces new tree supply contract](#)



higher than the workplace all -industry rate <sup>14</sup>. Improving health and safety is therefore of paramount importance.

1.6.2. Reducing risk is driven by a hierarchy of controls: removing or replacing the hazard, isolating people from the hazard, changing the way people work (including training), and Protective Personal Equipment (National Institute for Occupational Safety and Health, 2023). Technology is driving improvements in all these areas for the forestry sector.

1.6.3. There is an established industry forum the Forest Industry Safety Accord<sup>15</sup> (FISA). The Accord states that the UK Forest Industry:

- Believes that all fatalities and injuries are preventable.
- Supports development of a new safety culture where the health, safety and welfare of all those working in the forest industry is a fundamental priority.
- Believes that through strong and committed leadership we can work collaboratively to significantly improve the health and safety performance of our industry.

1.6.4. FISA's Steering Group has members from 28 company CEOs and directors, including large contracting businesses and trade associations. NRW is represented on the, alongside industry representatives including Confor and the Forestry Contractors Association.

## 1.7. Where we want to be

1.7.1. We will increase woodland cover in Wales to bring all the multiple benefits associated with woodlands, including planting for future timber production. In managing existing woodlands, it will be important to undertake timely thinning and harvesting to optimise the market. To ensure sufficient and appropriate timber supply for the future, the work to restock trees after timber has been extracted must keep pace with demand. There is an opportunity to increase the amount of brash collected. Brash and offcuts, rather than being left unused after felling, can be fed into the supply chain, for example being converted into biochar, providing increased resource efficiency and additional value from forestry operations.

1.7.2. As well as afforestation, we will concentrate resources to improve the current management of existing woodlands, supporting landowners and farmers to increase timber and wood fibre supply, as well as reduce risks to forests posed by climate change, pests and diseases.

1.7.3. The sustainable management of natural resources is our guiding principle, meeting the needs of the present without compromising the ability of future generations to meet their own needs. We will manage our woodlands appropriately to attain high levels of environmental

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<sup>14</sup> [Fatal injuries in agriculture, forestry and fishing in Great Britain 2022/23 - HSE](#)

<sup>15</sup> [The Accord](#)

protection, maintaining and enhancing the resilience of ecosystems and the benefits they provide, mitigating and adapting to climate change and contributing to halting and reversing the decline in biodiversity.

1.7.4. The UK Woodland Assurance Standard (UKWAS)<sup>16</sup>, first published in 2000, provides a common audit standard for independent certification that woodlands in the UK are in sustainable management. NRW manages the WGWE to UKWAS standard. There is an opportunity to do more to attract the private sector to meet the UKWAS standard. Confor represents the sector on the UKWAS steering group and will work with the certification bodies to make UKWAS accreditation more attractive to small woodland owners.

1.7.5. NRW's current Timber Sales and Marketing Plan<sup>17</sup> communicates their approach to the harvesting and marketing of timber from the WGWE for the period 2021-2026. The current plan sets out that the volume of timber NRW brings to market each year will be within the range 735,000m<sup>3</sup> to 835,000m<sup>3</sup>.

1.7.6. Considering the future role of the WGWE in contributing to ongoing timber production, we will work with NRW to maximise the volumes of timber that can come to market. We will consider whether investment in building harvesting capacity and infrastructure is needed. Such investment could include roading to reduce the risk of future failure of forest roads and to support the thinning of difficult to access crops, making regular thinning interventions more achievable.

## 1.8. What do we need to do

Welsh Government will:

- Introduce a new capital grant scheme in 2025/2026 for the forestry and timber sectors to apply for up to 40% grant contribution for purchases of equipment, machinery and small-scale infrastructure. Eligible activities will include mobilising (harvesting), processing and adding value to forest products, squirrel and deer control in the maintenance of existing woodland.
- Support woodland creation both within and outside the Sustainable Farming Scheme through flexible options and provision of advice to ensure appropriate planting takes place and giving farmers the tools to make informed decisions through a Trees and Hedges Planting Opportunity Plan
- Develop options to present to Ministers around potential models for increasing the size of the WGWE and associated forestry resource, whilst ensuring impacts on other land use priorities are managed.

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<sup>16</sup> [Home - UKWAS](#)

<sup>17</sup> [Natural Resources Wales / Timber sales and marketing plan 2021-2026](#)

- Work with NRW, Forest Research and other stakeholders to improve forest data and mensuration (the precise measurement and quantification of forest resources) to enable better long-term forecasting, giving confidence in future timber harvesting and facilitating a more strategic approach, positively impacting on the whole supply chain.
- Collaborate with Forest Research and NRW to see whether remote sensing could be used to give more accurate data regarding existing forest resource, including “overdue” stands<sup>18</sup>, to improve estimates of timber on the WGWE.
- Liaise with NRW to monitor the effects of all permanent removals (as well as other factors) that could threaten the productive timber resource, taking mitigating actions to maintain or increase levels on the WGWE. Gather information from the private sector also, liaising with Confor about their survey(s) of members around permanent removals.
- Continue to sit on Forest Research's Working Group for the 50-year Production Forecast (to be published in 2025). Promote it under our knowledge exchange programme as key data for Wales which can facilitate coordinated, long-term investment in planting and harvesting infrastructure.

NRW will:

- Implement their Forest Resource Plan review programme to ensure that timber producing potential is considered together with the requirements of UKFS, certification schemes and delivery of SMNR to balance all the demands on WGWE.
- Use the 50-year forecast to develop their 5-year timber sales and marketing plan. NRW will continue to work with Welsh Government to help identify required investment in the WGWE to increase the harvest to maximise available timber volumes.
- Provide information regarding Environmental Impact Assessments for deforestation, illegal felling and other known removals on non-WGWE woodlands.
- Use models such as Hylobius support system to aid decision making on fallow periods and reduce reliance on chemicals.
- Continue to use industry standards for mensuration and to support FR with access to data from the WGWE to help them to report and to develop new approaches.

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<sup>18</sup> “Overdue” denotes crops that were not felled within their allocated felling period. N.B. this doesn’t necessarily indicate crops are beyond maturity/utilisation/stability.

- Contribute to industry safety fora, through membership of key working groups, working in partnership with FISA, Confor, Forestry Contracting Association and others. The WGWE may offer opportunities to innovate and research safe forest practices to achieve a sustainable increase in supply across Wales.

## 2. Priority 2 - Increasing resilience in our forests

### 2.1 Where are we now

- 2.1.1 The Climate Change Committee's 2021 UK climate risk evidence (CCRA3-IA) highlights risks to forestry arising from extreme weather events and changing climatic conditions (including temperature change, water scarcity, wildfire, flooding, coastal erosion, wind and saline intrusion) and from pests, pathogens and invasive species. Forestry productivity may also be affected by climate-related impacts to soils due to seasonal aridity and wetness<sup>19</sup>.
- 2.1.2 Welsh Government supports research programmes, including Forest Research's delivery of the Science and Innovation Strategy for forestry in Great Britain<sup>20</sup>, which includes research into alternative tree species and adaptation of forest management practices to improve forest resilience to climate change. Forest Research has set up a Climate Change Hub<sup>21</sup>, which provides resources and tools to help forest managers adapt management practices to better cope with climate change.
- 2.1.3 Forests need to be healthy and resilient to environmental change if they are to maintain and enhance their capability to produce timber, provide other benefits to society and a high-quality habitat for wildlife. This is reflected in the updated version of the UK Forestry Standard<sup>22</sup> (UKFS), which says that to maintain or establish a diverse composition across the forest management unit, no more than 65% of the area is to be allocated to a single species.
- 2.1.4 Welsh Government encourages continued efforts to promote diversification to improve resilience to climate change, pests and diseases. Careful planning and use of appropriate alternative species, by both private and public sectors, will be needed to avoid an overall reduction in future timber production in Wales.
- 2.1.5 The UK Woodland Assurance Standard (UKWAS)<sup>23</sup>, first published in 2000, provides a common audit standard for independent certification that woodlands in the UK are in sustainable management. The UKWAS standard is used as the basis for the two accredited forest certification schemes operating in the UK: the Forest Stewardship Council®<sup>24</sup> (FSC®) and the Programme for the Endorsement of Forest Certification<sup>25</sup> (PEFC). Certification under one or both of these schemes assures the buyers and users of wood and wood products that they come from sustainably managed woodlands.
- 2.1.6 The woodlands that NRW manage on behalf of Welsh Ministers are the largest timber supplier with dual-certification status in Wales. The sustainable management of the WGWE means the land is managed in such a way as to

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<sup>19</sup> [Climate Adaptation Strategy for Wales](#) 2024, p.37

<sup>20</sup> [Science and innovation strategy for forestry in Great Britain | GOV.WALES](#)

<sup>21</sup> [Welcome to the Climate Change Hub - Forest Research](#)

<sup>22</sup> [The UK Forestry Standard - GOV.UK](#)

<sup>23</sup> [Home - UKWAS](#)

<sup>24</sup> [Home | Forest Stewardship Council](#)

<sup>25</sup> [PEFC - Programme for the Endorsement of Forest Certification](#)



maintain biodiversity and natural ecological processes, as well as being socially and economically beneficial<sup>26</sup>.

- 2.1.7 Silvicultural methods will also need to adapt to meet the challenges and opportunities arising, with a greater diversity, including continuous cover techniques and riparian planting. Forest design will consider preventative measures such as designing forest edges to improve wind stability, creating different canopy layers, building in firebreaks, thinning and increasing the removal of all combustible materials including brash.
- 2.1.8 It is important to understand the potential of different silvicultural approaches to achieve different objectives, over different timescales. A mixture of short-term actions is required, to accelerate carbon sequestration and increase available supplies of timber, alongside planting for longer-term diversity, resilience and carbon sequestration.

## 2.2 Where we want to be

- 2.2.1 Under the Well-being of Future Generations (Wales) Act 2015<sup>27</sup>, the statutory description of the 'Resilient Wales' goal sets out our aim to be 'A nation which maintains and enhances a biodiverse natural environment with healthy functioning ecosystems that support social, economic and ecological resilience and the capacity to adapt to change'.
- 2.2.2 We want to have flourishing woodlands and to expand our woodland cover in Wales. We aim to maximise the benefits they provide by bringing more woodlands under effective management. These benefits include environmental, amenity, biodiversity, carbon sequestration and sustainable timber production. To do this, our woodlands will be suitably adapted to climate change, with greater diversity and appropriate species mixes for future resilience.
- 2.2.3 We will support continuing research and development efforts to improve resilience in our woodlands. We will continue to use improved stock, both conifers and broadleaves, following the work of the Conifer Breeding Cooperative and Future Trees Trust. At the same time, we will push for wider and faster paced species and genetic diversification. We will support the industry in continuing to seek improved plant stock for yield, strength and resilience and to make adjustments throughout the supply chain to support the more widespread use of alternative species.
- 2.2.4 It is essential for everyone involved in forestry to increase knowledge and skills, leading to better informed decisions on climate change adaptation practices. We will continue to engage with Forest Research on the delivery of their Science and Innovation Strategy, which includes research into alternative tree species and adaptation of forest management practices to improve forest resilience to climate change.
- 2.2.5 For new tree planting to respond appropriately to climate change, it is important to have access to genetically diverse and climate-appropriate stock,

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<sup>26</sup> [Natural Resources Wales / Our forest and woodland certification](#)

<sup>27</sup> [Well-being of Future Generations \(Wales\) Act 2015](#)

in sufficient quantities. We will secure the necessary supply of forest genetic materials, including seed orchards, as well as sufficient capacity in forest nurseries.

- 2.2.6 Forest Nurseries require at least a three-year lead-in time to supply the plants needed for woodland creation and restocking. To minimise risk for nurseries, long-term contracts will be offered where possible, such as the tree supply contract entered into by NRW for 2022/23 – 2030/31 for restocking and woodland creation on the WGWE<sup>28</sup>.
- 2.2.7 We will build on our existing plant health and biosecurity measures to ensure highly effective protection of plant species and associated ecosystems from new and existing pests and/or pathogens.
- 2.2.8 The UK horticulture and forestry sectors led the development of the Plant Health Management Standard, which is regarded as the benchmark biosecurity standard and forms the basis of the Plant Healthy Certification Scheme. We will increase land managers confidence that trees sourced from UK suppliers are better protected against pests and disease by adopting the standard in Wales.
- 2.2.9 In the future, under our woodland creation grant schemes, we will introduce the requirement for land managers to obtain their trees from suppliers who can provide evidence they are either Plant Healthy<sup>29</sup> certified or have a valid Ready to Plant Assessment<sup>30</sup> at the time they supply the trees. Until we introduce the requirement, we strongly recommend that people acquiring trees for the purposes of planting under a Welsh Government-funded scheme ensure they are sourcing planting stock from a supplier that is part of a Plant Healthy Certification Scheme or equivalent.

## 2.3 What do we need to do?

Welsh Government will:

- Support research, through programmes such as the Science and Innovation Strategy for Forestry in Great Britain<sup>31</sup>, to identify alternative species and provenances and better understand the genetic basis of resilience of a range of tree species, including establishing more trial plots and the collection of seeds from high-quality trees.

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<sup>28</sup> [Natural Resources Wales / NRW announces new tree supply contract](#)

<sup>29</sup> [Welcome to Plant Healthy - Plant Healthy](#)

<sup>30</sup> [Ready to Plant - Home](#)

<sup>31</sup> [Core research programmes 2021-26 - Forest Research](#)

- Work with Forest Research and other partners to create a future productive species selection tool for Wales, building on the tool created for Scotland. The tool establishes criteria to assess each species (broadleaf and conifer) against and can be weighted according to the priorities of the user, producing a short-list of highest-ranked species. This will feed into the work of the UK Forest Genetic Resources Group and inform future decisions, including prioritising future tree improvement strategies.
- Introduce a new capital grant scheme in 2025/2026 for the forestry and timber sectors, including forest nurseries, to apply for up to 40% grant contribution for purchases of equipment, machinery and small-scale infrastructure.
- Work with the sector to scope options for possible financial underpinning to minimise the risk for nurseries in providing alternative productive species to help speed up transition towards offering a genetically diverse range of suitable tree species for future timber production.
- Work with partners to increase availability of nursery biosecurity training, bringing it into syllabuses and industry best practice wherever possible.
- Increase monitoring and reporting of pests and pathogens to enable early identification and prevent spread.
- Update our Welsh Government *Phytophthora ramorum* strategy<sup>32</sup>, with NRW and the *Phytophthora* Operational Response Team, responding to a review from Forest Research which made suggestions about changes in approach to what remains of this quarantined pathogen.
- Review our contingency planning for extreme weather events. This will include the introduction of a windblow contingency plan detailing the approach to informing ourselves, taking preventative measures and then the processes to be followed when dealing with major windblow events in Welsh forests.
- Continue, via knowledge exchange, increased government guidance and stakeholder engagement, to encourage improved woodland management and acceleration of adaptation measures.
- Foster collaboration between key organisations, including facilitating knowledge transfer between nurseries, growers and policymakers, and making use of best practice, including from other countries.

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<sup>32</sup> [Phytophthora ramorum: disease management strategy | GOV.WALES](#)

### 3. Priority 3 – Resource Efficiency and Circular Economy

#### 3.1 Where are we now

- 3.1.1 A circular economy keeps resources and materials in use for as long as possible and avoids all waste. To decarbonise at scale, moving away from high embodied carbon materials and substituting them for more sustainable alternatives is essential. The transition to a circular economy (a ‘materials transition’) is one of the biggest areas of opportunity to grow the green economy. This is essential to meet international climate change obligations and to tackling the climate and nature emergency. In addition, access to resilient supplies of critical raw materials is becoming and will continue to become more and more important.
- 3.1.2 Regenerative materials are bio-based materials such as timber, straw or hemp, and/or reclaimed or recycled building materials that are produced and used in ways that have a positive impact on the natural environment and society. Their responsible choice and application can help restore natural resources, enhance biodiversity and wellbeing, and contribute positively to the local economy.<sup>33</sup>
- 3.1.3 In terms of resource efficiency, it is crucial to make the most of our available Welsh timber, producing no waste, maximising yields and adding value to products. Sawmillers are already very adept at using all of the tree, including bark and sawdust, to create saleable products.
- 3.1.4 At the end of first life, the potential to re-use and re-manufacture should be fully explored, before resorting to recycling. Smaller volumes of wood can be reused or repurposed to create household items and construction materials. An example of a community initiative already doing this, in combination with offering training, is the Reseiclo<sup>34</sup> social enterprise in Newport, South Wales.
- 3.1.5 There is potential to reclaim more timber than is currently retrieved, for example from demolished buildings. One of the Sustainable Schools Challenge<sup>35</sup> winners, Ysgol Bontnewydd and Community Centre in Gwynedd, will be zero carbon in operation, uses recycled materials from two buildings on site that were due to be demolished, and sources construction materials as close as possible to the site, including timber and sheep wool insulation.
- 3.1.6 Wales’s remarkable recycling progress since devolution means that we are already world class in capturing materials to go back into the economy. In April 2024, the Workplace Recycling Regulations<sup>36</sup> introduced a ban on all wood waste going to landfill as part of a set of complementary bans put in place alongside the workplace recycling separation requirements. This should help drive the trend towards more wood reuse or recycling.

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<sup>33</sup> [Regenerative Materials First - Woodknowledge Wales](#)

<sup>34</sup> [Home | Reseiclo](#)

<sup>35</sup> [Three new net zero carbon schools to be built - with design help from school pupils | GOV.WALES](#)

<sup>36</sup> [Workplace recycling | GOV.WALES](#)

- 3.1.7 There is an established supply chain in Wales for recycled wood which is used to provide a feedstock for panel board, animal beddings and biomass fuel. Organisations such as the Wood Recyclers Association<sup>37</sup>, the trade association for the waste wood recycling sector, can provide information about the process and signpost to organisations who recycle waste wood.
- 3.1.8 There are already great examples in Wales. Kronospan's Chirk plant now has manufacturing processes which enable products to be made with 90% recycled content. Diverting wood-based material like unwanted furniture and pallets from landfill, enables it to be reused in another product, extending its life, ensuring the carbon captured by the growing tree and stored in the material isn't released into the atmosphere.<sup>38</sup>
- 3.1.9 Welsh Government offers funding through the SMART Flexible Innovation Support (FIS)<sup>39</sup> which helps businesses, the third sector, public sector bodies and research organisations to innovate and create new products and services. The Circular Economy Fund for Business can be accessed through SMART FIS, to help businesses take important steps like adapting their processes to use recycled material and reduce the materials they need to use.

## 3.2 Where we want to be

- 3.2.1 We want to drive implementation of a waste wood hierarchy to optimise wood recycling and ensure the burning of timber for fuel is a last resort, safeguarding the supply of raw materials for high-value manufacturing and support extended carbon sequestration
- 3.2.2 Building on progress already achieved, we want to see more wood-based material diverted from incineration and landfill, enabling the fibre to be reused in other products, extending its life and ensuring the stored carbon it contains isn't released into the atmosphere. We want to see design which means these recycled products are designed in such a way that they themselves are capable of being recycled again, retaining the carbon through several cycles of use and re-use.
- 3.2.3 We want to support innovative, scalable projects which prevent waste and value surplus materials as a resource. We want to see the development of new products, processes and technologies alongside the necessary infrastructure (such as centralised processing facilities for pulping plants, wood pellet manufacturing, and engineered wood manufacturing), to allow this waste to be turned into desirable products, creating jobs and boosting the economy.

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<sup>37</sup> [Wood Recyclers Association \(WRA\) | Wood Recycling](#)

<sup>38</sup> [Case Study: Circular economy - Woodknowledge Wales](#)

<sup>39</sup> [SMART Flexible Innovation Support \(FIS\) | Business Wales](#)



### 3.3 What do we need to do

Welsh Government will:

- Work with stakeholders to collectively grow the “wood basket” available for the future demands of all users. We will encourage greater wood use across the economy, at the end of first life, resulting in higher volumes of recycled wood available in the market.
- Work alongside Confor to: support the wood panel industry in their goal to meet more of the demand for their products currently satisfied by imports; work with the pallet industry to further improve their return, repair and reuse schemes.
- Promote innovation to expand timber and wood fibre into other usages, driving decarbonisation and helping Wales to derive far greater value from supply chains, providing economic benefit.
- Develop, in partnership with stakeholders, a clear wood cascading protocol that will account for second and potentially third operational lives for Welsh grown wood fibre.
- Support research and development into advanced wood treatments, sustainable manufacturing processes, and design technologies – using our knowledge exchange programme to highlight best practice and case studies to illustrate how to design new products with circularity in mind.
- Scope options to encourage a more circular wood economy through market development, financial incentives and explore the potential to make supportive regulatory changes.

The Welsh Government-funded Home-Grown Homes 2 project is implementing several tasks under this Priority, for delivery before 31<sup>st</sup> March 2026:

- Understanding the opportunities for the Welsh supply chain from using home-grown and reclaimed timber in retrofit repairs, maintenance and improvement. A report will be produced to highlight opportunities covering joinery elements, insulation and sawn wood products.
- Offering a series of three webinars to encourage coordination of, and buy-in for, cascading wood use ensuring wood is reused across multiple product lives, moving from primary, high-spec applications e.g. beams and load-bearing elements, into less demanding uses such as joinery, furniture, panels, or packaging and ultimately into bioenergy at the end of life.
- A report on using Tai ar y Cyd<sup>40</sup>'s demand for timber to prototype approaches to get more home-grown and reclaimed wood flowing into social housing.

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<sup>40</sup> [The project – TAYC](#)

## 4. Priority 4 – Instilling confidence in demand

### 4.1 Where are we now

- 4.1.1 Using wood in construction to displace high-carbon materials is one of the most effective ways to use limited biomass resources to mitigate climate change<sup>41</sup> and presents a significant opportunity for Wales to lead in low-carbon housing. Timber homes store carbon, reduce emissions through material substitution, and align with modern, high-performance construction methods.
- 4.1.2 Wales has increased its timber-frame share slightly, from 26% in 2019 to 28% in 2024, but total residential timber construction remains around 1400 homes per year in Wales<sup>42</sup>. The Welsh Government's Social Housing Grant is a key driver for using timber in all new-build social homes, with all schemes now incorporating a timber 'inner leaf'. Through this grant thousands of homes have been built since 2021, with many more in construction, contributing towards our target of 20,000 new, low carbon, social homes by 2026.
- 4.1.3 Public procurement provides a key opportunity to support the delivery of a net zero public sector in Wales. Public sector purchasing power can drive a wider step change in Wales, so that the procurement of sustainable goods and products, whilst phasing out the procurement of non-sustainable alternatives, becomes the norm in the public sector and beyond.
- 4.1.4 Wales has already made progress through the introduction of the Social Partnership and Public Procurement (Wales) Act 2023<sup>43</sup> and in 2023, the Waste and Resources Action Programme (WRAP) published a Low Carbon & Resource Efficient Construction Procurement Guide<sup>44</sup> to help public and private sector clients and contractors.
- 4.1.5 In May 2025, as part of the Home-Grown Homes 2 project, Woodknowledge Wales launched an Early Stage Embodied Carbon Tool (ESECT)<sup>45</sup> - a user-friendly, web-based tool, designed to assist housing professionals in assessing and reducing embodied carbon emissions at the earliest stages of low-rise housing design.
- 4.1.6 The Tai ar y Cyd project<sup>46</sup> embodies the approach we want to see applied more widely. This unique collaboration between social landlords, government, and industry experts is dedicated to tackling housing challenges in Wales, with home-grown timber a key component. The Tai ar y Cyd pattern book

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<sup>41</sup> <https://www.theccc.org.uk/wp-content/uploads/2019/02/UK-housing-Fit-for-the-future-CCC-2019.pdf> p.14

<sup>42</sup> Structural Timber Association – Structural Timber Market Update 2025

<sup>43</sup> [Social Partnership and Public Procurement \(Wales\) Act 2023](#)

<sup>44</sup> [Low Carbon & Resource Efficient Construction Procurement | WRAP - The Waste and Resources Action Programme](#)

<sup>45</sup> [New Tool Empowers Early Design Decisions to Cut Embodied Carbon in Welsh Housing - Woodknowledge Wales](#)

<sup>46</sup> [The project – TAYC](#)

designs were co-created with Welsh timber frame manufacturers to maximise opportunities to promote the use of timber in new zero carbon affordable homes and to unlock opportunities to accelerate the use Welsh timber.

- 4.1.7 The project promotes standardised, offsite-manufactured net-zero timber homes, providing a major opportunity to mainstream C16 and other Welsh-grown timber products<sup>47</sup>. The decision to maximise use of timber, particularly Welsh timber, is a real time opportunity for the 16 Tai ar y Cyd landlords who are using the pattern book on new sites to build over 400 homes as part of the prototyping phase. This 'demand led' approach will stimulate opportunities to bring more Welsh timber and timber-based insulation products into the supply chain.
- 4.1.8 The newly established Tai ar y Cyd Prototyping Community of Practice will surface learning essential to build supply chain relationships that maximise the medium to long term aggregated pipeline demand opportunities for the 24 Tai ar y Cyd social landlords.
- 4.1.9 In Wales, only around 4% of harvested Welsh timber goes directly into structural sawnwood construction markets.<sup>48</sup> Welsh timber processing, in common with the rest of the UK, is aligned to current market demands (e.g. fencing and pallet). The challenge is to increase demand for structural construction products. Most home-grown Sitka spruce does meet C16 strength-grading requirements, but specifier confidence remains low<sup>49</sup> and over-specification remains a barrier, mainly in the repairs, maintenance and improvements (RMI) market.
- 4.1.10 Large sawmills (processing >25,000m<sup>3</sup> /yr), process 42% of the total Welsh harvest – approximately 499,000 of homegrown timber each year<sup>50</sup> (including Pontrilas Sawmills – which, although in England, is close to the border, and a vital, established link in the Welsh timber supply chain). They employ around 700 people full time in total. Most of the sawn wood cut in large mills is sold into pallet and fencing markets. Importantly, only a small percentage of the large mills sawn timber output is structurally graded and directed to construction markets, due to market demand.
- 4.1.11 Many of the smaller sawmills in Wales are family-run and closely integrated into the fabric of rural communities, sourcing from local woodlands, supplying local markets and employing local people. Together, the smaller Welsh sawmills process around 30,000 tonnes annually, employing around ten times as many people per sawlog than the larger mills<sup>51</sup>.

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<sup>47</sup> C16 is strength-graded softwood used in construction. This grade is widely accepted for joists, studs, and load-bearing applications in low- to mid-rise housing.

<sup>48</sup> [Timber Industrial Strategy Data Annex](#)

<sup>49</sup> [Timber and Decarbonising Wales.pdf](#)

<sup>50</sup> (2020a) National Forest in Wales Evidence Review annex-4 cited in [Timber and Decarbonising Wales - Woodknowledge Wales 2025](#)

<sup>51</sup> [Timber and Decarbonising Wales - Woodknowledge Wales.pdf](#)

- 4.1.12 Smaller sawmills are used to processing a variety of alternative tree species, hardwood as well as softwood. Many specialise in producing bespoke timber-framing, external construction, and joinery products. The flow of larch to the smaller sawmills will not last, due to the spread of *Phytophthora ramorum*<sup>52</sup> making it important to sustain supply, as well as adapt machinery where necessary, to keep local supply chains thriving and benefiting the businesses and their communities in the future.
- 4.1.13 A Sawmillers Community of Practice (CoP)<sup>53</sup> was established in 2021, facilitated by Woodknowledge Wales. Small scale sawmillers meet every 4-6 weeks to discuss issues around log supply and demand, species selection, kiln drying, business models and technical support. The CoP recently visited the Association of Scottish Hardwood Sawmillers (ASHS) project<sup>54</sup>, which brings together many elements of the timber and forestry supply chain to promote and increase marketplace awareness of locally grown, sustainably sourced timber.

## 4.2 Where we want to be

- 4.2.1 Wales has 15% woodland cover and supplies roughly 12% of the UK's harvest<sup>55</sup>, but lacks supply chain infrastructure to reach high-value construction markets.
- 4.2.2 We need to actively encourage the increased supply of timber available for long-life uses, including graded structural timber, as well as supporting existing markets and supply chains that already rely on the steady supply of Welsh timber. We will promote production in Wales of wood-based products with increased value, extended durability and climate resilience.
- 4.2.3 More can be done to assist both the public and private sector bodies to plan for reducing whole life carbon in construction projects. Momentum is needed towards the wider application of timber-based construction products beyond timber frames, including wood-fibre insulation, timber windows, and roof shingles. Early consideration of alternative methods of construction, including off-site manufacturing, modular and panelised systems, and lightweight construction solutions can all reduce the overall carbon footprint of building works.
- 4.2.4 The opportunities for the use of timber and wood fibre as a low embodied carbon building material, as well as recycled wood fibre, are clear. However, further work is needed, in collaboration with industry and academia, to provide sufficient evidence to improve the confidence of lenders, valuers and insurers about the safety of using timber, particularly mass timber construction. The timber industry is helping to address insurance concerns through publications

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<sup>52</sup> [Ramorum disease \(Phytophthora ramorum\) - Forest Research](#)

<sup>53</sup> [Communities of Practice - Woodknowledge Wales](#)

<sup>54</sup> [Discovering how cooperation benefits small timber processing - Woodknowledge Wales](#)

<sup>55</sup> [Forestry Statistics 2024 - Forest Research](#)

such as the ASBP's Mass Timber Insurance Playbook<sup>56</sup>. It is essential to overcome barriers such as perceptions around safety, fire risk, longevity of timber and wood fibre.

- 4.2.5 In addition to new-builds, timber already plays a role in maintaining, upgrading, and decarbonising the buildings we have. We can expand this opportunity in Wales by upscaling retrofit-focused timber solutions to improve ageing, poorly performing housing stock.
- 4.2.6 A key priority for action is working with public sector partners to seek ways to improve the accessibility and visibility of the pipeline created by public sector infrastructure projects, to ensure the supply chain is in place and able to respond. Welsh Government is commissioning consultants to understand what pipeline information needs to be visible to key stakeholders – including forest estates, sawmills, timber frame manufacturers, contractors, learning institutions, lenders and insurance industry.
- 4.2.7 It is important to better align the timber being offered to the market with the needs of sawmillers, product manufacturers of all sizes and end users, with consideration given to matching the timber supplied with the intended markets and end-products. There is an opportunity to facilitate access for smaller operators to timber from the WGWE through NRW offering small parcel timber sales in lots suitable for local processors. Additional opportunity would arise from increasing timber sales from private woodlands.
- 4.2.8 Support for small sawmillers and processors can play a positive role in expanding access to timber from farm woodland, increasing responsiveness to market demand and benefiting local communities by providing rural employment opportunities. Provision of employment in rural communities can sustain and enhance the Welsh language and aid community cohesion, decreasing the need for Welsh speakers to leave their communities in search of work.
- 4.2.9 By working collaboratively, we will achieve better integration along the whole supply chain involving owners and growers, managers and contractors, primary, secondary, tertiary processors and the end user. With leadership and direction from the private sector we will foster and maximise the potential of value chains, from forest to product – to enhance the product's value as it moves along the supply chain, strategically using the Welsh resource for maximum benefit.

#### 4.3 What do we need to do

Welsh Government will:

- Introduce a new capital grant scheme in 2025/2026 for the forestry and timber sectors to receive up to 40% grant contribution for purchases of equipment, machinery and small-scale infrastructure.

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<sup>56</sup> [Mass Timber Insurance Playbook – The Alliance for Sustainable Building Products](#)



- Scope options for using the full range of public sector levers, including procurement, incentives and supportive regulatory changes, to increase the use of timber and wood fibre in long-term uses, such as construction. This will include using social housing pipeline data to stimulate demand for timber and wood fibre to deliver affordable zero carbon social housing in Wales and learning from the Tai ar y Cyd Prototyping Community of Practice.
- Sit on Forest Research's UK-wide Project Advisory Group for the new Wood Fibre Utilisation Statistics report being developed to replace the previous Timber Utilisation Statistics reports<sup>57</sup>, last published based on 2015 data.
- Commission a study to identify actions for local supply chain development, including scoping the potential for an initiative for Wales similar to ASHS, to benefit local businesses including farmers and small woodland owners, foresters, local sawmillers and furniture makers.
- Work closely with UK Government and Devolved Administrations to maximise cross-Border potential for Wales regarding flows to, through and from each side of the border, including exploring opportunities for Welsh businesses created through the English Timber in Construction Roadmap<sup>58</sup>
- Support the development of economic opportunities for timber from biodiverse, deciduous woodland, thereby expanding and diversifying the market for Welsh timber.
- Create a resource pack and pilot training for farmers about generating income from sustainable harvesting of timber and non-wood forest products from farm woodlands and trees in agroforestry systems.

NRW will:

- Develop their Timber Sales and Marketing Plan for the next 5-year period (2026 to 2031) and will engage with industry sector to establish needs and requirements. This will inform the preferred methods of sale.

The Welsh Government-funded Home-Grown Homes 2 project is implementing several tasks under this Priority, for delivery before 31<sup>st</sup> March 2026:

- Enabling home-grown and reclaimed timber supply into Tai ar y Cyd, working with all scales of sawmills to overcome barriers to supply to Tai ar y Cyd projects and other housing markets. Using Tai ar y Cyd demand for timber to prototype approaches to unlock more Welsh timber.

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<sup>57</sup> [Timber and Trade - Forest Research](#)

<sup>58</sup> [Timber in construction roadmap 2025 - GOV.UK](#)

- Framing the wood in construction Greenhouse Gas Removal opportunity using the Tai ar y Cyd pattern book. In doing this, surfacing the grade and quantity of wood required for Tai ar y Cyd to stimulate the supply chain.
- Developing markets and enabling supply of timber-based construction products, such as wood fibre insulation and timber windows.
- Designing and testing simplified embodied carbon reduction guidance.
- Supporting Local Authorities, Social Housing landlords and others to use of the ESECT embodied carbon tool e.g. training, webinars and technical support.
- Producing a report to highlight the value of small and medium sawmills in the timber value chain and to encourage their greater involvement in house construction.

## 5. Priority 5 – Developing Sector Capacity

### 5.1 Where we are now

- 5.1.1 As we transition to a stronger, fairer, greener Wales, we need an expanded, skilled workforce to manage our trees forests and woodlands. The study by the Forestry Skills Forum<sup>59</sup> predicted an increase in demand for forestry professionals in Wales until 2030. Forecasts are showing these. There is an urgent need<sup>60</sup> to recruit and retain skilled people at all levels in the industry.
- 5.1.2 New people are not joining the sector in sufficient numbers. There are low numbers of trainees on full-time forestry-related Further Education courses, as well as low Apprenticeship numbers in Wales. The sector is made up of a significantly high number of micro-enterprises and sole traders, which compounds the challenge for new entrants entering the profession as these businesses find it financially unviable to take on apprentices and untrained staff<sup>61</sup>.
- 5.1.3 For early years learning, Wales has established a good network of Eco-schools with one of the highest participation rates in the world at approximately 90% of schools engaging in the programme<sup>62</sup>.
- 5.1.4 We have both vocational and academic training routes available. Wales is introducing Vocational Certificates of Secondary Education (VCSEs) to the National 14-16 Qualifications suite<sup>63</sup>. There will be a VCSE in Agriculture, Horticulture and Forestry taught in schools for the first time from September 2027.
- 5.1.5 In 2024, Bangor University, the first University in the UK to offer a degree in forestry, celebrated 120 years of teaching forestry. Coleg Llandrillo Menai offer full time forestry training with Coleg Cambria offering a Forestry Apprenticeship.
- 5.1.6 There are barriers to entry as learners require experience and the forestry sector face challenges with employing new entrants (many micro businesses struggle with the cost of employing less experienced workers). Costs can prohibit potential students due to the distance they would have to travel to attend a Welsh college providing forestry training.
- 5.1.7 The Welsh Government's Flexible Skills Programme for Forestry and Timber Supply Chains<sup>64</sup> provides direct support for businesses as a review of training requirements and evaluation of previous schemes is undertaken and future skills needs are identified across the forestry timber and built environment sectors.

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<sup>59</sup> [forestry-workforce-research-final-report-130821.pdf](#)

<sup>60</sup> [Timber Industrial Strategy Data Annex](#)

<sup>61</sup> [The Forestry Skills Forum - Lantra](#)

<sup>62</sup> [Eco-Schools - Keep Wales Tidy - Eco-Schools](#)

<sup>63</sup> [National Qualifications: VCSEs | Qualifications Wales](#)

<sup>64</sup> [Flexible Skills Programme | Business Wales](#)

- 5.1.8 There is potential to increase the active management of existing farm woodlands and develop stronger supply chains with the network of local sawmills which are integral to the rural economy. There are opportunities for medium and large mills with the increasing demand for timber frame houses.
- 5.1.9 We have a forestry workforce with a range of qualifications and competencies. However, there is limited information available to attract new entrants to forestry and clearly visible pathways to demonstrate progression within the sector are lacking.
- 5.1.10 There is a lack of detailed, up to date data on skills in the timber industry for Wales specifically. To achieve a thriving and skilled workforce and to prepare for future demands, data collection is necessary to better understand the current position.

## 5.2 Where we want to be

- 5.2.1 We need to grow a strong, resilient and progressive forestry sector that supports the sustainable management of natural resources and the increased use of timber and wood fibre. This requires a well-informed, skilled and diverse workforce which better represents society with training and learning opportunities that are equally accessible to individuals of all backgrounds.
- 5.2.2 We want to have a clearer understanding of the current workforce within the forestry sector to identify skills levels, gaps and address pressure points
- 5.2.3 We need to take a holistic approach and provide early exposure to land-based learning, drawing young people towards this sector whilst they are still in full-time education. We will ensure there is an integrated approach to forestry knowledge and skills, alongside other land-based sectors, from the early years through to post-16 education, collaborating with other sectors to support the implementation of VCSEs in Agriculture, Horticulture and Forestry.
- 5.2.4 We need a clearer recognition of forestry as a skilled and valued profession, encouraging new entrants to join the sector. We will establish identifiable pathways to progression both to allow new entrants to develop the right skills and confidence, and to provide a clear career progression pathway for the current workforce. We will have a uniform method of recording qualifications to demonstrate continual professional development and provide a record of skills and experience.
- 5.2.5 We must also foster improved recognition of timber properties and the multiple uses of timber as a low carbon material at all levels of the supply chain, creating an environment where professionals understand the process of managing timber from seed through to sawmills and at final production stages. This will include upskilling owners of existing woodland to enable them to realise the economic value of timber and wood products.

### 5.3 What do we need to do?

Welsh Government will:

- Working collaboratively cross border, undertake a workforce review to understand the sector skills requirements.
- Review any gaps identified to current training programmes and liaise with training providers and the forestry and timber sectors to encourage the development of tailored programmes to provide the skills to enable rapid uptake of innovation and new technologies, co-ordinating the offer to support small and micro-enterprises to access the skills they need.
- Conduct an evaluation of the Focus on Forestry First skills delivery project
- Work with the sectors to promote the integration of forestry and timber knowledge at an early age (pre-16) across the curriculum.
- Encourage well-designed training that is fit for purpose to enable vocational learners to have a broad range of competencies to deliver ecosystem services at the landscape scale.
- Review existing mechanisms of support for post-16 training, including Apprenticeships, support needed for the development of off-site timber training, post-16 entry to forestry and the promotion of forestry to those with transferrable experience and skills.
- Support the development of higher-level professional training programmes, working with other Nations to ensure a consistent approach.
- Work to develop an integrated approach to land and natural resources management at a further and higher level of education, in particular for agriculture and environmental sciences, to include learning about sustainable wood and non-wood forest product value chains.
- Support training for farmers and landowners on woodland management and economic potential of sustainably harvested timber and non-wood forest products.
- In addition to the professional competencies developed by the Institute of Chartered Foresters, support the development of a competency framework to demonstrate career progression for entrants and those wishing to progress or evidence their level of expertise.
- Work with the sector to establish a standardised industry recognised tool allowing the workforce to record training and Continuous Professional Development.
- Promote equality, diversity and inclusion in the forestry workforce. Support initiatives to engage people from Black, Asian and Minority Ethnic groups and/or disadvantaged socio-economic backgrounds and those from urban settings with no connection to forestry but an interest and an appetite to understand the sector better and potentially access training and/or employment opportunities.



- Co-ordinate a knowledge exchange programme for forestry and timber stakeholders. Encourage communication and promote understanding between different parts of the supply chain e.g. foresters, sawmills, trades, architects, planning officials, building inspectors, construction.
- Liaise with partners such as Confor, the Institute of Chartered Foresters, Royal Forestry Society, training providers and educational institutions, and develop a complementary communications plan to promote the sector with a focus on elevating its status and showcasing the professionalism and diverse opportunities.

The Welsh Government-funded Home-Grown Homes 2 project is implementing several tasks under this Priority, for delivery before 31<sup>st</sup> March 2026:

- Deliver a series of six Timber 101 training webinars and a summary report. The aim is to increase knowledge to enable users of timber to source, specify, design and manufacture timber components more suitable for the need of clients. The project will aim to create a hub for public good information about how to use wood in a way that maximises the potential of the material to help overcome common issues associated with poor specification and incorrect use.
- Illuminate benefits of timber construction elements – to produce a report about new insights on embodied impacts for timber construction materials beyond carbon, to stimulate demand for wood and home-grown timber e.g. biodiversity and eco-system services and create procurement advice note
- Farmers and forestry – to develop a tree-growing farmers Community of Practice (CoP). Identifying and supporting tree growing champions amongst farmers.
- Support for Schools – building on the work developed with Morgan Sindall and Cwmbrogi<sup>65</sup> Home-Grown Homes 2 project will explore opportunities to embed sustainable thinking (with a focus on design and construction) into three more schools across Wales. The schools will engage with sustainability and innovation through trees, forests, timber and sustainable construction and placemaking. This will be documented in a case study report.

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<sup>65</sup> [Skills and recruitment report - Woodknowledge Wales](#)

## 6. Priority 6 – Underpinned by Behaviour Change

### 6.1 Where are we now

- 6.1.1 The Public Opinion of Forestry survey 2025 (Wales)<sup>66</sup> reported that 87% of the respondents believed the woodlands near them provide at least one benefit to the local community. However, when asked to identify these benefits, only 45% said “they help to remove carbon dioxide from the atmosphere helping to reduce the impact of climate change”, 15% said “they provide timber and other wood products” and only 14% said “they support the local economy”.
- 6.1.2 One half (51%) of respondents believed that there was at least one woodland-related issue that disadvantaged the local community. Of these 7% said “the woodlands don't provide enough local jobs”.
- 6.1.3 However, some respondents raised commercial activities associated with forestry as disadvantages:
  - 6% Timber lorries make me feel unsafe walking/driving on the roads
  - 5% Timber lorries/visitors to woodlands make the roads busy
  - 4% Woodland operations create carbon dioxide contributing to making climate change worse
- 6.1.4 Around two thirds of respondents (68%) had visited forests or woodlands in the last 12 months. 47% of them had gathered products from forests or woodlands in the last 12 months.
- 6.1.5 The survey shows there is a need to further engage the public, to raise awareness and promote wider understanding/acceptance of the benefits of productive forestry. Messaging needs to discuss productive forestry in the context of all woodlands in Wales, benefits being discussed in relation to benefits derived while the trees are growing and after they are felled (and restocked) in terms of the timber and wood fibre produced.

### 6.2 Where we want to be

- 6.2.1 Having an active and engaged Industry Leadership Group with regular access to the relevant Cabinet Ministers will aid constructive dialogue between the private sector and the Welsh Government. An ILG will provide structured opportunities to discuss the industry's needs and identify areas for public sector collaboration, where Welsh Government's actions/support/input can add value. It will enable action by identifying where, how and what industry and government can most effectively work together on to drive economic growth and prosperity.
- 6.2.2 The ILG will promote the needs, interests and voice of the industry, contributing to raising the profile and improving practice, such as through

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<sup>66</sup> [POFS Wales 2025 10jul25.pdf](#)

linking in with other UK nations or promoting international best practice, providing guidance and training, and inputting into policy.

- 6.2.3 In addition, a Chief Forester would promote and raise awareness of the sector and provide a stronger voice for the sector and independent advice to Welsh Government. The Chief Forester would be a professional with relevant experience and skills to effectively champion the sector.
- 6.2.4 Targeted communications, used effectively, to communicate with and involve the public about the role of woodland as a crop and its economic benefits to Wales. Also to contextualise forestry within topics such as biodiversity, carbon reduction and the interconnectedness of these elements with forestry, highlighting the environmental, economic, and social benefits of sustainable forest management

### 6.3 What we need to do

- Confor will lead the establishment of an Industry Leadership Group in Wales (ILG). The group's membership should include a diverse range of expertise and experience, ensuring the group covers the whole supply chain and is not dominated by one particular interest. The ILG will be led by the private sector with Welsh Government collaboration.
- We will progress the proposal to recruit a Chief Forester for Wales by convening a drafting group including representatives of Confor, NRW and ICF. This group will prepare a role description and consider governance and support for the post. Options will be put to the Deputy First Minister and Cabinet Secretary for Climate Change and Rural Affairs to consider. Subject to Ministerial approval, recruitment will take place via an open, competitive public appointment process.
- The Knowledge Exchange programme referred to under Priority 5 is primarily aimed at stakeholders already active within the forestry and timber sectors and associated supply chains. In addition, we will launch communication actions, aimed at a wider set of audiences, including the general public. The aim will be to:
  - highlight the environmental, economic, and social benefits of sustainable forest management
  - raise the visibility of the opportunities for varied careers in the sector, including high-paid jobs.
  - promote understanding of trees, timber and wood fibre's contribution to carbon sequestration and storage.
  - promote understanding of the need for the materials transition and the importance of timber in this regard.
  - encourage greater awareness of the health benefits of timber in construction.

- “myth-bust” negative perceptions about the “quality” of Welsh wood, demonstrating practical applications and uses in construction.