



Forestry:

Fit for the 21st century



Confor
Promoting forestry and wood

Introduction

Forestry is unique – the more economic activity, the greater environmental benefit. More forests managed responsibly means more flora and fauna protected, and more potential for recreation. More sales of wood means more money to care for the forest, more rural jobs and more carbon locked up.

Growing forests act as carbon sinks, and wood products act as carbon stores. Wood from sustainably-managed forests has the lowest carbon footprint of any major building material, such as steel, brick and concrete. Investment in forestry means creating green jobs and stimulating the economy; in England, the sector supports around 110,000 green jobs and contributes £4 billion per year to the economy. ^[1]

England has a rich forest heritage – but at around 10 per cent, its woodland cover is among the lowest in Europe. ^[2] An interesting graph from respected forestry expert Gabriel Hemery (right) shows clearly how far we are behind most European countries. ^[3]

Increased planting and investment in forestry can lead to economic, environmental, recreational and social benefits. Sustainably managed forests can tick all the boxes:

Economic benefit at a time when the Westminster government most needs it. Many forestry businesses are small and/or family-run, and employ people in secure, full-time jobs in rural areas with few other large employers. In addition, the growth of the forestry industry since 1980 now displaces an estimated £1 billion of imports annually, having a very positive effect on the Government's balance of payments. ^[4]

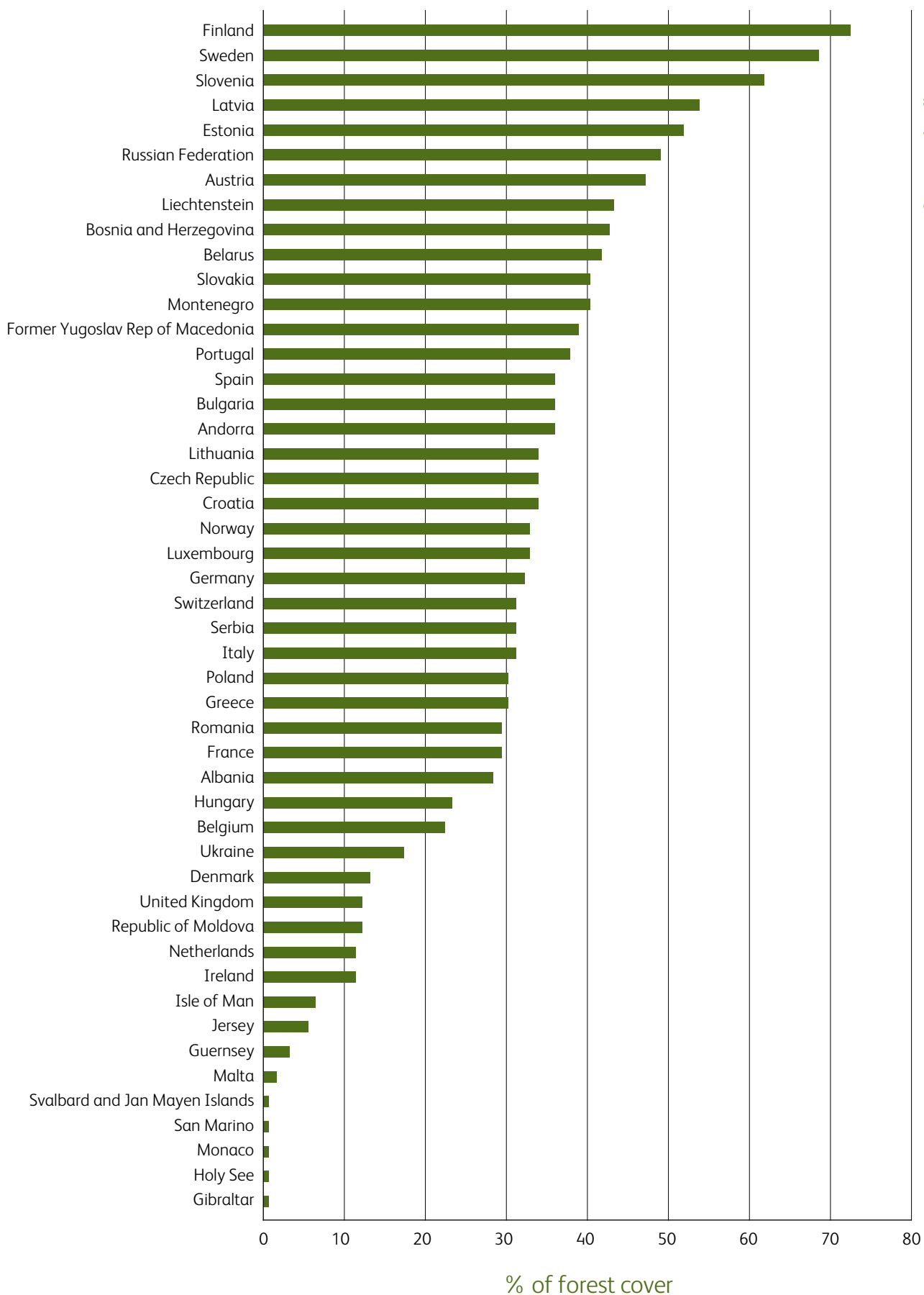
Environmental benefit at a time when there is an increasing focus on reducing our reliance on fossil fuels and carbon emissions. The authoritative report by Professor Sir David Read in 2009 said that if an extra four per cent of UK land were planted with new woodland over the next 40 years, it could be locking up ten per cent of the nation's predicted greenhouse gas emissions by the 2050s. ^[5]

Biodiversity benefit at a time when there is a significant demand to protect and enhance the flora and fauna in our forests. Sustainable and careful management of all England's varied woodlands can achieve this.


Recreational benefit at a time when there is significant pressure to ensure public access to forests. Managing forests to produce wood and support other services can help to pay for the access that the public wants – for a large range of pursuits including dog-walking, mountain-biking, bird-watching, hiking and horse-riding.

Professional foresters and active woodland owners know how to manage forests sustainably, but more must be done to support them – and to understand the complex, multi-layered nature of modern forestry.





© www.gabrielhemery.com



“More woods bring more benefits. The case is strong because woods don’t just provide single benefits - they bring a package of many environmental, social and economic benefits.”

Woodland Trust submission to Independent Panel on Future of Forestry, August 2011

The modern face of forestry

Public awareness of forestry has been dominated by a media focus on conservation, negative images of 20th century plantations and people's personal experience, which is usually centred on recreation.

A lack of understanding of 21st century forestry has been very apparent in the debate about the future of Forestry Commission woodland. The popular perception is that forests are in decline and cutting down trees is damaging. Wood producing forests have often been portrayed as dark, impenetrable and devoid of wildlife. All this could not be further from the truth.

Many of England's most valued forests were originally planted purely for wood, but foresters realised long ago that these plantations were not suitable for the modern world - and have begun re-modelling and re-shaping the 20th century plantations to make them fit for the 21st century.

This involves the creation of multi-purpose forests with mixtures of species and more open space. Such forests can provide jobs and investment, as well as environmental benefit, enhanced biodiversity and recreational opportunities.

Not all woodland owners are able to offer the same level of access that publicly managed and funded forests can afford - but there are many examples of popular, well-used forests in the private sector. It is believed that up to 50 million visits are made annually to privately-owned woodlands, although figures are not collated.

Forestry has come a long way, but one thing remains constant - caring for any forest requires income, even native woodlands managed for public access or for biodiversity.

This means that **sustainability** - and especially financial sustainability - must be at the heart of modern forestry.

Supporting a virtuous cycle of forest activity by raising income means more green jobs and greater environmental benefit - and with it, the improved access and biodiversity that everyone wants.^[6]

Underpinning this must be a coherent policy framework to support forestry and wood processing and create a climate which encourages investment. There is a fundamental disconnect between political cycles of no more than five years and forestry cycles of at least 30 and up to 120 years. Forest businesses often complain that ever-changing policies, mechanisms, grants and regulations make planning exceptionally difficult and discourage sustainable management and long-term investment.

It is a regular complaint that grants are increasingly used for short-term biodiversity or recreational gain - and don't underpin long-term forest management. Perversely, this can mean biodiversity or recreational benefits are not secured in the longer term.

It is important that modern, sustainable forestry is understood if our forests are to thrive and deliver all the benefits that they can. There is a real danger of enormous lost opportunities if a coherent policy framework is not developed to underpin sustainable management - lost opportunities for jobs, carbon, biodiversity and recreation.

The real people who work at all stages of the forestry industry - and the issues that concern them - are highlighted over the next few pages.



The forestry supply chain

Forestry in England supports 110,000 jobs across an enormous range of activities. Many of those are employed by small and often family-run businesses, offering secure jobs in rural areas with few other employers of any size.

Below is a simple representation of the forestry supply chain. The true picture is much more complex, but this gives an idea of the sort of people who work in forestry, the jobs they do - and how the whole industry fits together.

Growing trees and supplying them to the market

“Well-managed forestry has a good message – it provides rural jobs, offers plenty of biodiversity and soaks up carbon.”

Charles Beaumont, Trees Please

The Nursery

Trees Please, in Northumberland, has been growing and selling trees for 25 years and can “supply practically anything the tree market requires”. It has nine permanent employees and regular seasonal staff.

www.treesplease.co.uk

Managing an estate to provide a range of products and benefits

“We like to think of ourselves as a progressive rural estate. Responsible stewardship is at the heart of how we go about our business.”

John Wilding, Head of Forestry and Environmental Economy, Clinton Devon Estates

The Woodland Owner and Manager

Clinton Devon Estates, in Devon, has 1900 hectares of commercial conifers and native broadleaf, employs 70 people and produces 10,000m³ of FSC certified timber per year.

www.clintondevon.com

Planting trees and carrying out general maintenance

“Forestry is a very long-term business – you are not planting for this generation, but the next generation. There are not enough trees going into the ground now.”

Ian MacLellan, Owner, Chapel Forestry

The Establishment Contractor

Chapel Forestry is a small business which plants hedges and trees and carries out ground maintenance on a contract basis.

**7 Chapel Lane, Walcote, Lutterworth, Leicestershire LE17 4JS
Tel: 07967 709117**

Buying and harvesting trees and delivering to the processing sector

“Currently there is an adequate supply of timber on the market, but planting policies need to be reviewed sooner rather than later to address the reduction in supply and we need to focus more on growing commercial crops for timber production. A consistent and reliable supply of raw material is essential to underpin the confidence necessary to invest.”

Cameron Smith, Managing Director, Sheffield & Co

The Harvesting Contractor (Mechanised)

Sheffield & Co is a timber harvesting and marketing company based in Carlisle, employing about 50 people. It buys and harvests trees and delivers them to clients, including sawmills.

www.sheffieldandco.co.uk

Collecting timber at roadside and hauling it to the processing sector

“Wood is a renewable resource. All the tree is used - there is no waste at all. The bark is peeled off and used for chipboard or bark chips for gardens. The sawdust goes into the hopper to make pellets for boilers.”

Dave Pickles, Owner, Dave Pickles Timber Ltd

The Haulier

Dave Pickles Ltd, based in West Yorkshire, works as a contractor to buy timber at the roadside and haul it to the processing sector.

73 Barnsley Road, Flockton, Wakefield, West Yorks

Processing timber for a range of industrial uses

“The government needs to realise what an important industry we have. Wood is a serious product and it’s saving imports and improving the balance of payments.”

Jeremy Hickman, Chairman, Pontrilas Timber

The Sawmiller ⁽¹⁾

Pontrilas Timber employs 120 people in Pontrilas, Hereford, and supplies timber for construction, fencing and pallets.

www.pontrilastimber.co.uk

Processing timber to benefit society

“Trees add to the landscape, they blend in – and they lock up carbon, and provide jobs. Our sawmills have invested heavily and provide lots of work and job security.”

Peter Irving, owner, P Irving & Sons

The Sawmiller ⁽²⁾

P Irving & Sons, based in Kirkby Lonsdale, Cumbria, employs 24 staff and supplies timber for fencing and pallets.

Hutton Roof Saw Mills, Kirkby Lonsdale, Carnforth, Lancashire LA6 2PE

T: 01524 271510

Making specialist timber products for the construction industry

“Forestry is very highly-regulated with huge costs and a serious administrative burden, even for a small firm like ours. The forestry industry should shout louder.”

Edward Stenhouse, Director, InWood Developments

The Finger Jointers

Inwood Developments employs six people making innovative green-glued, finger-jointed timber components for the construction industry.

www.in-wood.co.uk

Providing mdf, osb & chipboards to a wide range of businesses

“The impact of a drop in planting will be simple – stagnation of capital expenditure.”

Karl Morris, Head of European Operations, Norbord

The Panel Producer

Norbord is an international panel producer with annual global sales of \$1bn, and employs 800 in the UK.

www.norbord.com

Providing wood chips to the local biomass industry

“We have pioneered work in sweet chestnut and also worked in oak, Douglas fir, larch, ash – but we are finding trouble with wood supplies because of the biomass market.”

Gary Battell, Suffolk County Council & Co-Founder of Anglia Woodfuels

The Biomass Chipper

Anglia Woodfuels Ltd offers a chipping and advisory service for clients who have installed, or are considering installing, a wood-fuelled biomass boiler.

www.angliawoodfuels.co.uk

Real issues affecting real people

The businesses quoted on the preceding pages work right across the forestry sector and have different concerns and aspirations. However, as these detailed quotes show, there are some key areas affecting the whole sector – and if action is taken, very significant benefits can accrue.

Charles Beaumont is director of Trees Please, which grows and supplies around 80 different species of tree from seed to forest businesses across the UK. It has nine permanent employees on a 100-acre site near Corbridge, Northumberland, and can have a staff of up to 25 at peak times:

“We can spend a year or even two treating a seed so it is ready to germinate, then it can take up to four years before we can harvest the tree. Starting the process so long before

we supply the trees means there is a lot of guesswork - it's impossible to know what the market needs so far out. Business is above average at the moment but it's difficult to predict. Forestry is a long-term business – and politics doesn't fit with that. We want consistent regulation and support for our customers, instead of chopping and changing.

“Well-managed forestry has a good message – it provides rural jobs, offers plenty of biodiversity and soaks up carbon. Yet the

only thing that will bring derelict woodland back into management is the ability to make money from it – a better price or carbon offsetting payments. The money earned over the life of the crop has to be better than it currently is for owners to want to get in there and manage a woodland. All nurseries would like to see more woodland being managed, more planting and higher prices – that would rub off and benefit us.”

Cameron Smith is managing director of timber merchants & timber haulage company Sheffield & Co Ltd, near Carlisle. It employs around 50 people and was established in 1947:

“We buy timber from the private sector and the Forestry Commission across the north of England and into southern Scotland. Once harvested, the timber is used to supply sawmills which are best placed to optimize its value. Demand for timber is strong at the moment and prices have risen throughout the early part of the year. I think forestry is well-placed generally to benefit from any improvement in the economy.

“One of the biggest problems we face is that the forestry workforce is ageing and we need a higher intake of new blood. Costs are very high too – the price of fuel and new equipment rise steadily whereas rates are constantly under pressure, so we must look at ways of improving efficiencies.

“Currently there is an adequate supply of timber on the market, but this availability reduces as we approach the next decade. Planting policies need to be reviewed sooner rather than later in order to address the reduction in supply and we need to focus more on growing commercial crops for timber production. Continual investment

is needed in both the harvesting and processing sectors and a consistent and reliable supply of raw material is essential to underpin the confidence necessary to invest. Forestry needs to raise its voice and shout. It is not well-understood by the general public.”

Jeremy Hickman is chairman of Pontrilas Timber, which employs 120 at a sawmill in Herefordshire and has a packaging and palleting plant in north Wales:

“We are very busy; the market is reasonably strong. We supply timber for construction, fencing and pallets – and all are doing well.

“However, there is a total lack of understanding of the industry by government. If you look at Ireland, it has had problems but it has a proper forestry policy.

“We have got to start planting and pretty quickly – there is lots of derelict woodland that should be brought back into use. But it needs to be policed – people need to realise if they get a grant, they need to provide a decent crop of timber. Planting could be ramped up 10-15 per cent. Wood is a serious product and it's saving imports and improving the balance of payments.

“I think big biomass will create a supply problem because firms are buying up forests and putting sawmilling logs into a furnace. Most large-scale biomass plants proposed are on the coast and will rely on imports. It's not very green to bring timber from Canada to put it on a bonfire. Big biomass will screw up the supply chain; even now, there is not enough timber to go around.”

Dave Pickles is the owner of Dave Pickles Timber Ltd, in Flockton, West Yorkshire. There is a family link to the firm going back 60 years:

"I buy trees and sell them - I'm a middle man. Most of my business is in North Notts and North Lincolnshire but I go down to Corby and up to Middlesbrough and Durham. I have quite a few customers that I deal with regularly.

"At the moment, I am absolutely flat out. There is a demand if you have the timber, if it's good-quality and you can get it when people need it. You have to understand how important your customers are. I could sell more wood if we could cut it quickly enough. There is a big demand for logs, for bars and for chipwood.

"Wood is a renewable resource. All the tree is used - there is no waste at all. The bark that is peeled off is used for chipboard or bark chips for gardens - and the sawdust goes into the hopper to make pellets for boilers."

Ian MacLellan is director of Chapel Forestry, an establishment contractor based near Lutterworth, Leicestershire. The firm has been operating for 20 years:

"My expertise is knowing the job and doing it to a high standard. Sometimes the trees are on site and sometimes I have to supply everything - the trees, the guards, etc.

"I think government could do a lot more. They are not planting enough trees to sustain the industry. Forestry is a very long-term business - you are not planting for this generation but the next generation. There are just not enough trees going into the ground. It was very different when I first started 20 years ago.

"I think we need to make the public more aware. People just don't realise the potential of trees. Forestry is quite an insular industry and does not shout about itself enough."

Peter Irving is owner of P Irving & Sons, Hutton Roof Sawmills, Kirkby Lonsdale, Cumbria, and employs 24 staff:

"My dad started off in firewood more than 50 years ago. We started cutting chocks (pit props for coal mines) and built up on hardwoods, then since the late 90s, we have got into softwoods. Our main line now is fencing and pallets and business hasn't been too bad. We cut timber to order and work at near-capacity all year round.

"But there is a longer-term problem. The past and present governments haven't done any planting. There is a shortage of timber. If we

don't plant quickly, it will be too late. It's the future we're talking about and if we don't plant, we don't have a future.

"The Forestry Commission is more focussed on the amenity side - but that aspect [social, recreational and biodiversity] should be able to operate side by side with commercial forestry. Trees add to the landscape, they blend in - and they lock up carbon, and provide jobs. We used to have so much more tree cover, but we haven't cared for our forests like France and Germany.

"Our sawmills have invested heavily and provide lots of work and job security. We can match the quality of imported timber and home-grown timber is good for the balance of payments. We should change the rules to open up land for planting. Planting trees can benefit the country economically and environmentally. There is no waste from a tree - everything is used. More planting will generate more work."

Edward Stenhouse is a director of InWood Developments, in East Sussex, which employs six people making green-glued, finger-jointed timber components for the construction industry:

"We have a hell of a lot of work on; there seems to be money for specific projects. We have pioneered work in sweet chestnut and also worked in oak, Douglas fir, larch, ash - but we are finding trouble with wood supplies because of the biomass market."



Karl Morris is Head of European Operations for Norbord, which makes MDF, chipboard and OSB. It employs 800 people in the UK.

“We could not operate without long-term security of supply. It’s the first question our management board will ask - do you have the supply? Wood supply is central to what we do and ten-year contracts are common. This is a highly capital intensive industry and all our investment is geared around an

understanding of and comfort with wood supply. There is a general consensus in the industry that more woodland planting needs to be coming through - and it seems to be on the political agenda, but just doesn’t seem to be happening.

“All sectors are affected. The thicker parts of trees are used by sawmillers, while board companies are almost waste users – we take the thinner parts of tree and by-products

from sawmills. We mop up what isn’t much use to other folks. The tree is important at all these stages in the chain. We are located in rural areas where there aren’t many major employers - and provide good, well-paid jobs; they are not temporary or low-paid.”

Gary Battell - Suffolk County Council & Co-Founder of Anglia Woodfuels, a chipping and advisory service for the biomass industry

“The Government needs to encourage more landowners to get their woods into active management and more wood to market. We also have to do a lot more about using the heat load from big CHP biomass for district heating. We can do that through planning, design, legislation, incentives and contracts. Ultimately that’s got to happen as we cannot afford the heat just to go up a chimney.

“Forestry and recycling are exciting growth industries. I see wood and wood waste beginning to have a value and being treated on par with metals in the future. We need

to get our act together and the Forestry Commission, private sector and processing sectors have to come together to create a more integrated industry.

“I care passionately about the forestry industry and hope that we can continue to build on our partnership working. There is a good economic and environmental message to be heard. Jack Westby’s (former Director for Programme Coordination and Operations in the Dept. Of Forestry in FAO) said “the challenge to the forestry world was that forestry is not about trees, it is about people; and it is about trees only insofar as trees can serve the needs of people”. Today the forestry sector is aware that the environment, society and culture fit together in our industry, like no other.

It is perhaps a sad indictment that public access and recreation always seems top the list of benefits that forests bring to society in England, when perhaps the most significant benefit is the sustainable resource that is brought to market, both now and for future generations. The challenge for forestry today is to make sure that society is fully aware that wood will always be one of our most important and precious resources that underpins and ultimately contributes to recreation and conservation in our forests.

Key Issues



Key issues emerging from these interviews with real people in the forestry sector are:

- » Business is good – but could be better with a greater understanding by government
- » Forestry can make a very positive impact on the UK's balance of payments
- » It can provide secure jobs in fragile rural economies
- » More value needs to be placed on forestry and its range of benefits
- » Forestry is a long-term business and more planting is needed to guarantee its future
- » Investment won't happen unless a secure supply of timber can be guaranteed
- » Forestry is a truly renewable industry
- » **The industry can have economic and environmental benefits at the same time as providing public access and biodiversity**
- » Big biomass plants are a threat to the industry as they could starve it of timber
- » Forestry doesn't shout enough about itself – it gets on with its business
- » Unmanaged forests are an enormous missed opportunity

The most important point of all (highlighted in bold) is the lack of public awareness of the variety of England's forests and how managing them, including to harvest trees is a benefit not a threat.

Forests are not uniform and unchanging – despite the romantic image of historic forests that have existed forever. All our forests have been shaped to some degree by human interaction. This interaction, when undertaken by knowledgeable and able people can help our forests deliver the enormous range of benefits they are capable of. The income from wood sales allows significant investment in our forests – the wood sales pay for greater recreational opportunities and enhanced biodiversity, and deliver enormous environmental benefits along the way. However, there is a real missed opportunity in England– unmanaged forests.

Unmanaged forests – a major missed opportunity

Forestry can provide a virtuous cycle of green jobs, significant environmental benefits and attractive woodland that people can enjoy all year round. However, almost 500,000 hectares – around 45 per cent of England’s forests – are unmanaged at present, including some areas of Forestry Commission land. A report by government countryside agencies in 2005 concluded that a lack of management of forests was playing a significant part in the decline of key woodland flora and fauna.^[7]

Sustainable forest management is not an enemy of public access and biodiversity – it is the means to improve them, and to make our forests better. Managing woodlands in a controlled and sensitive way supports a sustainable balance of economic and environmental benefit and improved access and biodiversity. Unmanaged forests are bad news – bad for biodiversity, bad for access and recreation opportunities, bad for green jobs and bad for the environment. Everyone involved in forestry supports sustainable, active management – and this involves raising income. This is the same whether you are the Woodland Trust, National Trust or a small forest owner.

Some income comes from recreational use and fundraising by organisations like the Woodland Trust, but by far the biggest source of income is from wood sales. Around two million tonnes are harvested annually, raising more than £50m for England’s forests. This is far more than the government puts in. Without this money, few forests would be positively managed. If we can build long-term markets, simplify regulation and bureaucracy, and target grant support to bring forests under management we can make major in-roads into unmanaged forests – and deliver those enormous benefits.

Forests and wood markets are inter-dependent. If there is no market, there is no income from sales of wood, and if there is no supply, the market will disappear. A stable long-term policy framework can help to create a virtuous circle of growth, supporting green jobs ‘downstream’ and creating a ready market for wood. Success will deliver huge environmental, green job and carbon benefits. Continuing failure will damage biodiversity and recreation and threaten livelihoods

“While so many emissions reduction measures have negative connotations, tree planting can be a win, win, win solution: people love trees, we benefit from them in so many different ways, and now we know they could play a significant part in reducing the UK’s carbon dioxide emissions.”

Professor Sir David Read launching his report, November 2009
www.forestry.gov.uk/forestry/infd-7y4gn9

Clinton Devon Estates Modern Forestry At Its Best ^[8]

Clinton Devon Estates is a superb example of integrated land management on a vast scale, combining farming, forestry and other rural businesses with conservation, public recreation and social participation. Its mission statement is to “secure the long-term prosperity of the Estates and the people who live and work on them in ways which care for the countryside and assist the wider community”. The statement also says: “We like to think of ourselves as a progressive rural Estate with a rich, colourful history. Responsible stewardship is at the heart of how we go about our business.”

Clinton Devon Estates is a complex countryside organisation which directly employs around 70 local people, as well as, contractors and professionals. The Estates’ businesses directly boost the local economy, spending over £3.5m with 1000 local suppliers. Woodland cover is around 17 per cent, twice the English average, with 1900 hectares of commercial conifers and native broadleaved species.

The woodlands provide environmental, recreational and landscape benefits, as well as, a sustainable supply of timber for the wood-processing industry. Clinton Devon was one of the first estates to achieve Forest Stewardship Council certification to the UK Woodland Assurance Standard.

The Estates’ woodlands produce around 10,000m³ of certified timber per year. This is increasing, as conifers planted in the 1960s reach maturity and approach sustained production. This timber is sold to wood-processing industries locally, regionally and nationally, for fencing and construction. Broadleaf woodland produces ash poles for furniture and oak for fencing and planks. Traditional firewood logs are in high demand

and the Estates’ woodfuel business processes suitable wood into woodchip for boilers, supplying it through Forest Fuels Ltd to customers like Devon County Council and Paignton Zoo. Christmas trees provide valuable seasonal business.

Active forest management benefits biodiversity, achieving a complex environment with a rich diversity of tree species and age structure. For example, the rare nightjar thrives on the rotational conifer felling and replanted sites that adjoin the heathland. The ‘deadwood’ policy and areas of non-intervention safeguard bat roosts and have led directly to an increase in greater spotted woodpecker numbers.

The Estates manage significant Sites of Special Scientific Interest, including the East Devon Pebblebed Heaths, River Otter Estuary and western oak woods in North Devon. Commercial plantations occupy prominent hilltop positions within East Devon where the Area of Outstanding Natural Beauty designation is testament to the long family history of sensitive stewardship.

The estate woodlands offer a range of other benefits including:

- » Public access is provided to 90 per cent of the East Devon woodland including horse-riding and mountain biking. More mountain bike access is being discussed.
- » Screening of radio masts and recycling centres.
- » Providing clean and renewable energy, as an alternative to using finite fossil fuels.
- » Absorbing over 6000 tonnes of carbon dioxide, from the atmosphere each year.



Bringing an unmanaged forest back into use

After some 50 years of unmanaged private ownership a 10-hectare traditional oak woodland in Herefordshire came to the market and was purchased by a retired international timber broker. His objective was to bring the woodland into management to give the woods a future for generations to come.

Suffering seriously from a lack of thinning, the woods had become over-stocked and the undergrowth was impenetrable. The trees had grown straight up “like gun barrels” with little girth, no regeneration and no wildlife or flowers. The wood was choking itself.

An appraisal revealed a five-year programme of sympathetic thinning to give the trees room to grow to proper maturity and to allow the stifled carpets of wild daffodils, wood anemones and bluebell walks to flourish again. In tandem, birds and wildlife were encouraged, with walks and points of interest created.

This required considerable cost and investment.

With the object of making the venture self-supporting, and falling back on his commercial experience within the timber trade, the new owner built a dedicated timber-drying shed. Working with two self-employed forestry contractors, he bought specialist mobile equipment and converted felled trees on site to beams, planks and boards for local builders and craft industries. The ‘leftovers’ were sold into the growing firewood markets, with unusable twigs and branches piled to bio-degrade as habitat for insects and wildlife to thrive in.

The woods are now managed as a bio-diverse environment, where wildlife and flowers thrive. In conjunction with this, the woods pay for themselves as they grow to future maturity. Ongoing local employment has been created, local businesses are supported with eco-friendly supplies and visitors enjoy the attractive environmentally sustainable woodland.

Well-managed private woodland ownership is not only viable but is beneficial for the environment and its neighbourhood residents.

Security of supply

To deliver the full benefits of sustainable forestry, the businesses that rely upon it need to be guaranteed a secure, long-term supply of wood.

Confor has campaigned vigorously in the last few years to increase levels of new planting and to support sustainable management, to ensure more trees are going into the ground than are coming out – to create a virtuous cycle of economic and environmental benefit, with all the spin-offs in terms of access and biodiversity outlined above.

Planting has fallen dramatically since its UK peak of 30,000ha in 1989. It is vital that new planting picks up pace – and Confor supports the Read recommendations which suggest 23,000ha of planting per year is needed, which translates to around 10,000ha in England, against the current planting of 2,500ha in 2010-11. Even the Read recommendations

would only take England’s forest cover up to around 12 per cent – against a current European average of 37 per cent.

When mature trees are harvested to make all the products that we take for granted – including fencing, decking, timber frames for houses and garden furniture – those trees must be re-planted, so future supplies are guaranteed and the economic and environmental benefits are maximised.

This applies to all forests. The Forestry Commission owns 18 per cent of woodland in England with 70 per cent of its land given over to productive forestry, where timber is harvested and sold to wood-using businesses to raise money to re-invest in our forests

It is also vital that productive forests are protected. These are the ‘engine rooms’ of forestry in England. As well as supporting 110,000 jobs, they make the greatest contribution to reducing carbon and, crucially, they provide the income that pays for the care of so many of England’s forests and the public access to them.

Even though action is being taken to restructure these forests to make them more attractive in the landscape, to improve biodiversity and to increase opportunities for access, these forests are being lost. Consequently, the income to pay

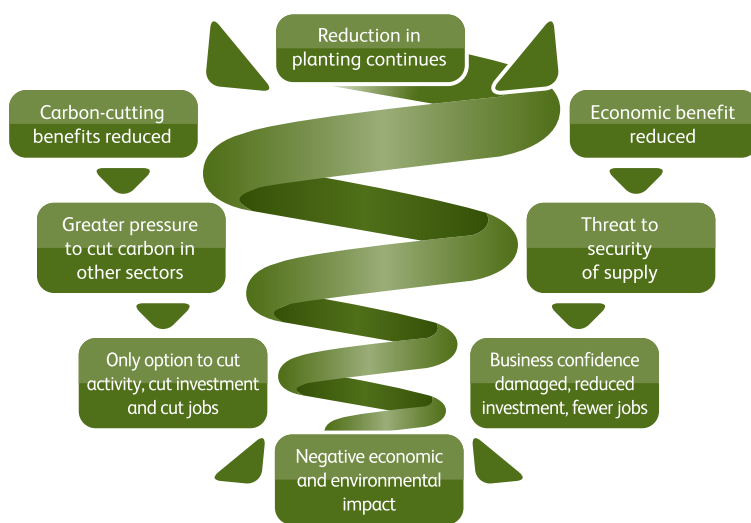
for forest management and public access will decline, as will rural employment and supplies of wood for low carbon construction and for renewable energy.

Rather than the virtuous cycle of growth, the current position threatened to lead forestry into a spiral of decline.

Forestry: The virtuous circle

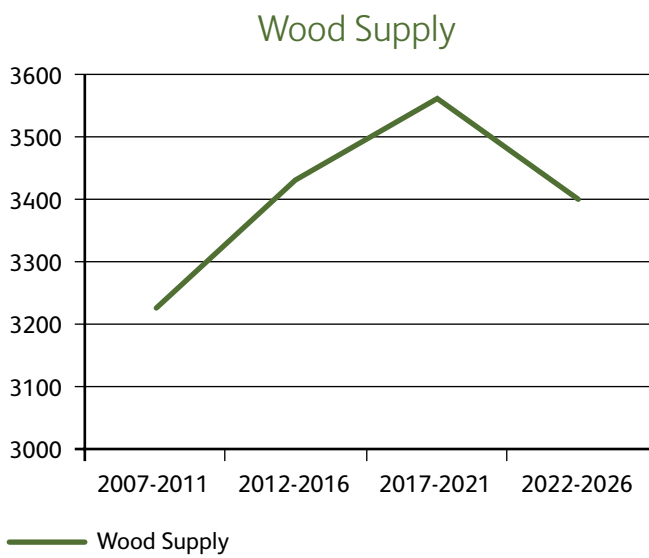


Forestry: The spiral of decline



This is why we must arrest and reverse the decline in productive forestry and stimulate significantly increased levels of new planting. This is indicated very starkly in the graph below.

2005 Forecast of Softwood Availability in England for 2007-2026 ^[10]



Left-hand column shows average annual volume of wood (thousands of cubic metres)

“Security of supply is everything. The first question everybody asks is, ‘Have you got the timber?’”

Tony Hackney, Chief Executive of BSW, the UK’s largest sawmiller ^[11]





The threat from big electricity

England’s forestry and wood sector also faces a threat from large energy companies seeking to build enormous biomass plants to generate electricity.

Government subsidies are driving big energy companies such as E.ON, Drax and SSE to pursue the biomass wood route, but the policy does not add up. Biomass plants delivering heat and power at a small-scale, local level are a good use for wood, especially at the end of its life – and could stimulate sustainable management and woodland planting at local level, helping to increase England’s forest area.

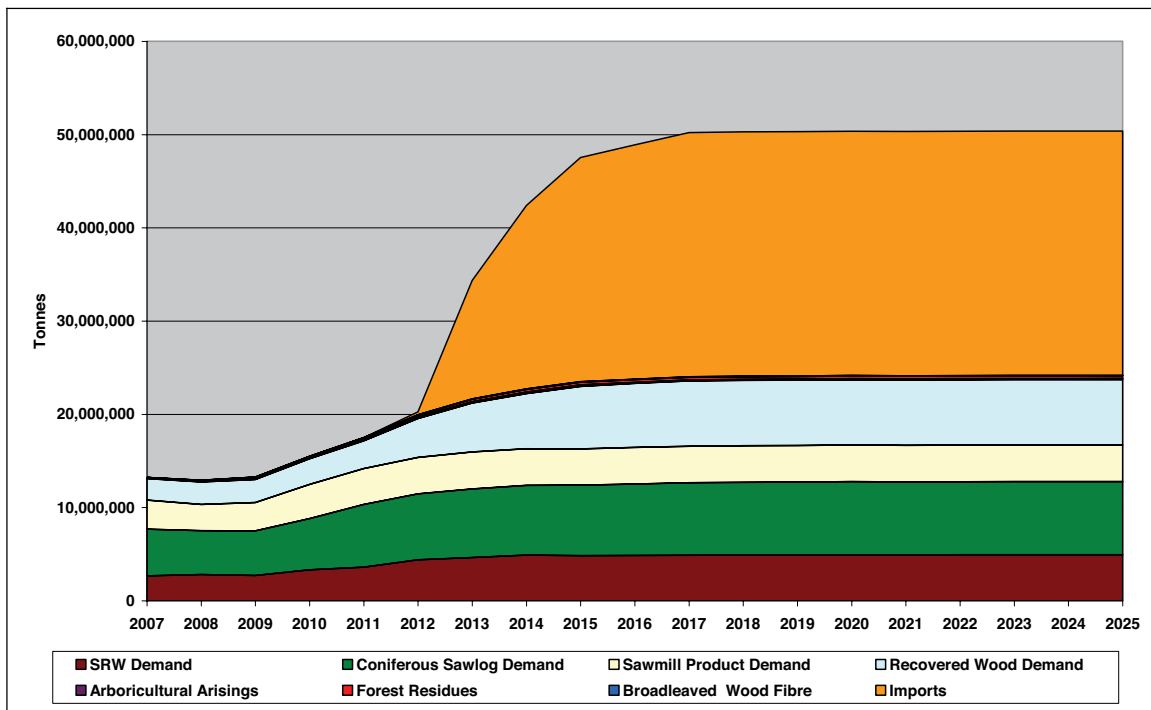
However, large biomass plants that simply generate electricity are far less efficient (experts suggest they are only 30 per cent

efficient, compared to around 85 per cent for local heat plants). Peter Solly, a woodchip and wood pellet supplier in south-west England, said: “Large-scale biomass could restrict the growth of local heat energy markets by hoovering up supplies, though it is the least environmentally friendly, most inefficient use of wood.”

These large power plants are also a real threat to timber supplies and to ‘downstream’ forestry businesses that relies upon them. Forest businesses provide more jobs and

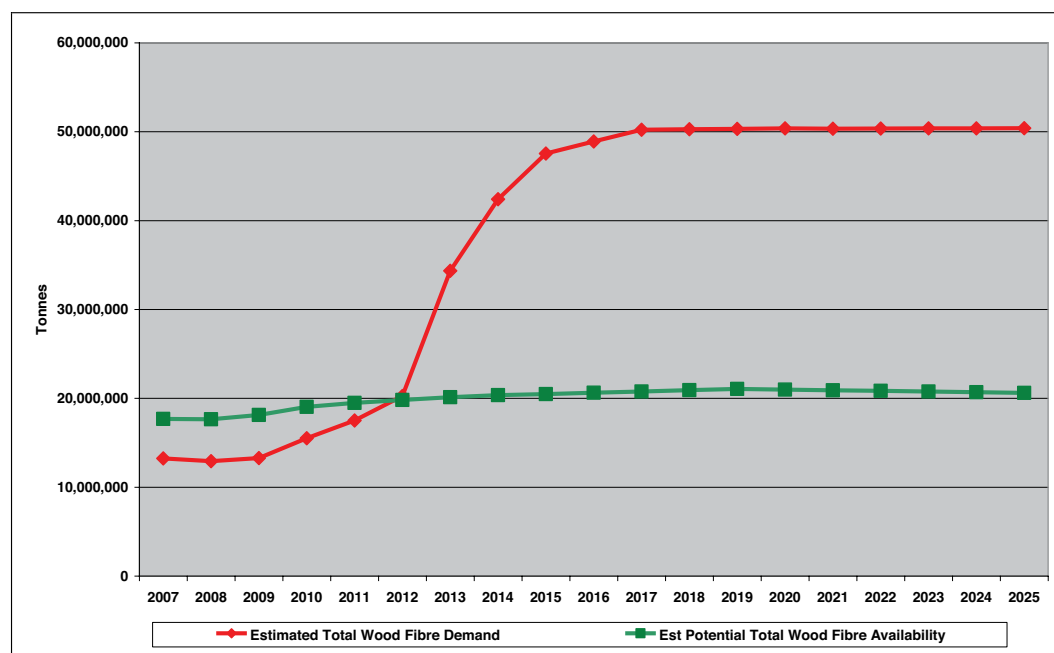
greater environmental benefit than large, electricity-generating biomass plants – and must not be starved of raw material. An independent report by John Clegg Consulting in April 2010 concluded wood supply in the UK would peak at around 20 million tonnes in 2019, with demand from existing markets at a similar level. Large-scale biomass plants proposed in the UK would need an extra 27 million tonnes of wood every year.^[12]

Forecast Total Demand for Wood Fibre in Britain by Type 2007 – 2025



The graphs above and on page 19 are from a report by by John Clegg Consulting Ltd - ‘Wood fibre availability and demand in Britain 2007 to 2025’

Forecast Total Potential Availability & Forecast Total Demand for Wood Fibre in Britain 2007 – 2025



Big energy threatens the whole supply chain. Forestry is a long-term business and wood-using businesses rely on security of supply over decades, not just a few years.

If wood is diverted away from existing users, then we will see an increase in carbon emissions and people working in fragile rural economies will lose their jobs – the opposite of what government wants to achieve.

Therefore, Government should resist planning applications for large-scale biomass plants that burn wood purely for electricity; they are an efficient use of timber and potentially destructive to the indigenous, low-carbon forestry industry.

Government should also explore removing eligibility for Renewable Obligation Certificates from new large scale biomass electricity plants that seek to burn domestically produced wood.

“If new large users of British grown wood and other wood fibre enter the marketplace, supported by subsidy, it can only be at the expense of existing users, impacting negatively and disproportionately on sustainability, employment, carbon sequestration and mitigation of climate change.”

From Foreword to Wood Fibre Availability and Demand in Britain, John Clegg Consulting Ltd, April 2010



Wood to save the world

If wood did not exist, then inventing it would be a milestone in history.

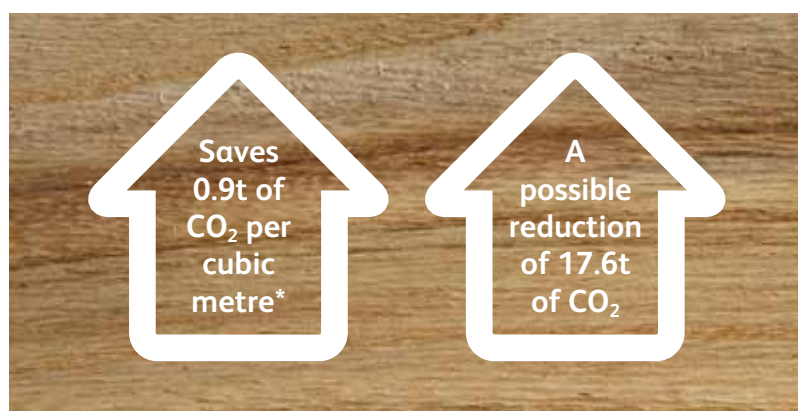
A versatile, attractive and infinitely renewable material, it has a staggering range of uses and is central to our everyday lives.

Solid wood can help lead the fight against climate change. Trees absorb CO₂ as they grow and, because of the carbon sink effect, wood from sustainably managed forests can actually

be better than carbon neutral. Some buildings using large quantities of wood have a negative carbon footprint. All new housing from 2016 must be zero-carbon and wood most easily fulfils that requirement.

Three tonnes of CO₂ can be saved by using timber frame from the 20 tonne CO₂ footprint

of a typical 3 bedroom detached house. Increasing the timber content, including softwood cladding, can reduce the footprint to 2.4 tonnes – a total reduction of 17.6 tonnes CO₂.^[13]



Wood has the best thermal insulation properties of any mainstream construction material

- » 5 times better than concrete
- » 10 times better than brick
- » 350 times better than steel

Source: www.sustainable-construction.co.uk

Using wood instead of other building materials saves on average 0.9 tonnes of carbon dioxide per cubic metre.

Source: Edinburgh Centre for Carbon Management

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Increasing the timber content, including softwood cladding, can reduce the footprint to 2.4 tonnes – a total reduction of 17.6 tonnes CO₂.

Source: Edinburgh Centre for Carbon Management Report 196, Carbon benefits of Timber in Construction, 2006

The carbon footprint of a material is identified by its 'embodied energy' – the energy required to manufacture and supply it to the point of use. A tonne of brick requires four times the amount of energy to produce than sawn softwood, for concrete it is five times, glass six times, steel 24 times and aluminium a staggering 126 times.^[14]

Wood can also help the UK rebalance its economy by strengthening its manufacturing resource as well as reduce its balance of payments deficit. As supplies of domestic wood have grown, sawmilling and panel board businesses have increased activity, displacing imports.

The UK imports more than 80 per cent of its wood requirement at a cost to the UK of about £6 billion a year. While domestic wood production will never replace all this, there is considerable scope for expansion that will create jobs, displace more carbon and, of course, deliver even more income to pay for the sustainable management of England's forests.

Trees take CO₂ from the atmosphere, capture it and produce oxygen in return. Wood provides shelter, comfort and beauty in our homes, offices, schools and public places. It protects our boundaries, opens new horizons in print and safely carries our goods around the globe.

www.woodforgood.com

Conclusion

England's forests need to be valued, understood, cared for and protected.

However, they also have to be paid for – and the best way to do this at a time of economic difficulty is through careful and sustainable management.

If our commercial forests are properly cared for, they can deliver an enormous range of benefits that will allow our woodlands to flourish through the 21st century and beyond.

The commercial forestry sector is committed to working with government to ensure we make the best use of a valuable and finite resource.

Green jobs, economic growth, lower carbon emissions, greater biodiversity, improved recreational opportunities – and a more vibrant and attractive countryside. Forestry really can deliver all of this.

“Forestry is a unique low-carbon sector which reduces carbon emissions and creates more jobs the more it produces. There is a need for joined-up government thinking, ensuring we optimise the use of wood and secure further sustainable supplies.”

Stuart Goodall, Chief Executive, Confor



Footnotes

- (1) Centre for Economics and Business Research Ltd, June 2006
- (2) Latest Forestry Commission figures show Great Britain has 2,982,000 hectares of forest, or 13 per cent of total land cover. England has 1,294,000ha (9.9 per cent), Scotland 1,385,000ha (17.8 per cent) and Wales 303,500ha (14.3 per cent)
<http://www.forestry.gov.uk/newsrele.nsf/AllByUNID/BAF13364908743718025789B005C0B66>
- (3) <http://gabrielhemery.com/2011/02/28/european-countries-and-their-forest-cover>
- (4) Figure calculated by Confor based on data from UN Economic Commission for Europe
- (5) <http://www.forestry.gov.uk/forestry/infid-7y4gn9>
- (6) The virtuous forestry cycle is explained in Scottish Forestry at The Crossroads, Confor 2010
www.confor.org.uk/Upload/.../37_ConforGreenFutureBookletNov2010.pdf
- (7) <http://naturalengland.etraderstores.com/NaturalEnglandShop/R653>
- (8) <http://www.clintondevon.com>
- (9) Forestry Commission, New planting in England, 1976-2009
- (10) [http://www.forestry.gov.uk/pdf/PF2005.pdf/\\$FILE/PF2005.pdf](http://www.forestry.gov.uk/pdf/PF2005.pdf/$FILE/PF2005.pdf)
- (11) From Scottish Forestry at The Crossroads, published by Confor, November 2010
http://www.confor.org.uk/Upload/Documents/37_ConforGreenFutureBookletNov2010.pdf
- (12) Add efficiency levels for big biomass plants if possible, plus Wood Fibre Availability and Demand in Britain, April 2010
http://www.confor.org.uk/Upload/Documents/37_WoodFibreAvailabilityDemandReportfinal.pdf
- (13) Edinburgh Centre for Carbon Management Report, Carbon Benefits of Timber in Construction, 2006
http://www.woodforgood.com/the_facts.html
- (14) TRADA: Energy Efficient Housing, A Timber Frame Approach, 1989



Confor is the voice of the UK's forestry and wood-using businesses. We aim to promote sustainable management of forests and successful wood-using businesses. Confor represents businesses all along the supply chain from nurseries and growers to wood-processing end-users.

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