FORESTRY & TIMBER NEWS

Confor
Promoting forestry and wood

June 2016 Issue 75

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CONFOR AGENDA

The elections may be over but there's still the politics... and then there's the referendum. But **Stuart Goodall** finds positive news closer to home

Uncertainty is still the only certainty

When I wrote my last leader I wondered if, when coming to write this one, we would have emerged from political uncertainty – the devolved elections would be done and dusted, and a clear majority would have emerged to leave or remain in the EU. No such luck!

At least we have a brand new Confor website to help the sector get its message over to the new parliament and assemblies. The site features new video content and a superb animation highlighting the importance of our sector. We hope to surpass the 10,000 unique visits a month that the old site received. The site is designed to work with mobile devices, so there is every reason to check it for latest news. Also, do embed our videos on your own websites and pass them around.

On the EU referendum, the polls indicate there is everything still to play for. Intriguingly, Confor's own industry poll has remained fairly steady at around 55 % remain, 45 % leave. There is still time to make your intentions known at http://conforuk.polldaddy.com/s/europe We will announce the 'result' on June 22.

In Scotland, things are quite a bit clearer, and very positive. The SNP is by far the largest party, though it did fall short of a majority. Nicola Sturgeon has made clear the SNP will run a minority government, which it has done successfully before. Of all the parties, the SNP made the strongest commitment to forestry and timber, and Confor will seek to continue to work closely with ministers and officials to deliver increased planting and a successful sector.

In Wales, Labour, in a similar position to the SNP, were less adept and let themselves be put on the back foot as Plaid, the Tories and UKIP initially blocked the appointment of Labour's Carwyn Jones as First Minister. It was always difficult, however, to see a rainbow coalition keeping Labour out of power given the mutual antagonisms that run deep amongst the 'minor' parties.

It would be nice to think that Labour will now get on with tackling restocking and new planting, but recent history shows that Confor's Martin Bishop will need all his strength to even get the ball rolling.

Northern Ireland has a complex voting system, but it threw up familiar faces with the First Minister and Deputy First Minister continuing as before. The Forest Service is also expected to continue to dominate the forestry scene for at least the next session of the Assembly.

So it's a mixed picture and an uncertain world, but hopefully one where Confor is helping to make things better for members. A new addition to the world is due very soon with Caroline Harrison, our England manager due to give birth to (perhaps) one of the next generation of foresters. If the little one arrives on June 23 will that missing vote make a difference...?

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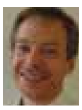

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We want to hear from you
Forestry and Timber News is your magazine, please contact us with your views and comments

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SNP runs with key points from Confor election manifesto

Confor delivered a major success for the forestry and wood sector in Scotland when key parts of its pre-election manifesto were picked up in the SNP's own manifesto ahead of the Scottish Parliament elections.

After the SNP won a third consecutive term in office, chief executive Stuart Goodall said Confor looked forward to working with the ruling party to deliver on its manifesto commitments.

Launched by First Minister Nicola Sturgeon at an event attended by 1400 people, the manifesto made a commitment to significant new tree planting and pledged to reduce bureaucracy around applications to create new woodland. It also highlighted the role that forestry can play in reducing future flood risks.

Mr Goodall said it was very encouraging that the manifesto had a significant section on forestry – and argued that this was largely down to Confor's hard work to explain the wide-ranging benefits of the forestry and timber sector to Scottish ministers and MSPs.

He added: "We launched our own manifesto, *Forestry and Timber: Growing a Resilient Scotland*, in the run-up to the party manifesto launches – and worked hard to explain why the Scottish Government had to commit to supporting a £1bn industry which employs more than 25,000 people by planting more trees."

The SNP manifesto pledged to "plant 10,000 hectares of new woodland every year to 2022" – around 22m trees per year – "and work to hasten the pace of application and approval of planting".

It continues: "We will deliver support for woodland creation and improvement through the Forestry Grant Scheme. In particular, we will support the planting of woodland which can help prevent flooding and assist in water basin management."

Mr Goodall said: "I'm very pleased to see Nicola Sturgeon confirm the SNP's determination to plant the new forests that Scotland needs to secure the future of a successful rural industry.

"It's a major step forward that the manifesto identifies the need for applications for tree planting to be speeded up as well as the recognition of the benefit that tree planting can play in mitigating the threat of floods."

Mr Goodall said Confor would work hard to ensure the other issues highlighted in its manifesto were also high up the agenda.

The manifesto called for continued support for timber transport – confirmned by the Scottish Government shortly before the May election – and for a 'Wood Equal' policy to use timber in construction to stimulate markets. In addition, it called for the re-stocking of public forests.

Mr Goodall said Confor would push for the Scottish Government to deliver in all these areas – and promised that its political engagement would go wider than the new government: "Now the election is over, we look forward to working with the new Scottish Government and the Rural Affairs, Climate Change and Environment (RACCE) committee to find the solutions needed to deliver these manifesto pledges. We will work with MSPs from all parties to secure the future of our sector for coming generations."

www.confor.org.uk/resources/publications/confor-publications/

5 action points from the Confor manifesto

1. Commit to plant 13,000ha of productive woodland a year, including 8-9,000ha of productive woodland, as part of the pledge to plant 100,000ha of woodland in the decade to 2022.

2. Deliver further improvements to the Forestry Grant Scheme – and associated computer systems – to speed up the process of approval for new woodland creation applications and to ensure the Scottish Government hits its official targets

3. The Scottish Government should deploy a 'Wood Equal' policy in all public buildings projects (new build and refurbishment) where possible and advantageous to do so.

4. The Scottish Government should work with the Forestry Commission to ensure that the national forest estate is fully restocked in the lifetime of the next Parliament.

5. The Scottish Government should continue to provide annual funding of around £3m to support investment in timber transport solutions.

From *Forestry and Timber: Growing a Resilient Scotland*

Climate change agreement in place for sawmills

When, after a huge amount of work, Confor concluded its Climate Change Agreement (CCA) for sawmills in 2014, it opened the way to an estimated 47 sawmill sites to benefit from a reduction in energy bills (through a relief on the payment of the Climate Change Levy) in return for achievable, and beneficial, action to reduce energy consumption.

Confor calculated then that, in total, sawmills could save £1.5m every year. This saving is set to rise significantly in coming years.

Two years on and 20 sites have joined the CCA, with more expressing interest. This is an excellent time for any sawmill that hasn't yet joined to consider doing so.

In the run up to the spring budget Confor, along with other relevant industry sectors, lobbied for the CCAs to continue. Confor also lobbied hard to ensure that the rules were not changed so that sawmills were excluded from a proposed tightening up of eligibility requirements for existing CCA participants.

In the budget, the Chancellor announced that CCAs would continue until March 2023, at least, with an assurance that the government "will not seek to alter the eligibility criteria for existing CCA schemes until at least 2023". He also announced that the Climate Change Levy (CCL) would rise significantly in April 2019, but that eligible sectors would remain protected from the CCL through participation in a CCA.

The CCL rates for electricity and gas will be gradually rebalanced so that they reflect the energy content of the fuel better: moving to an electricity:gas ratio of 2.5:1 from April 2019.

The cost of participating in the CCA is very modest – see panel, and sawmillers benefit from advice and a straightforward registration process that has been developed by Jacobs, an energy management advice firm that Confor has contracted with to run the Confor CCA.

The UK has some of the highest energy costs in Europe and domestic sawmillers compete daily with imports. Participating in the CCA is one way to reduce costs and improve profitability.

Mills can learn more by getting in touch with Stuart Goodall at stuartg@confor.org.uk

Turnover per site	Joining fee		Admin fee	
	Member	*Non-M*	*Member*	*Non-M*
<£10m	750	1,100	550	850
£10m-£30m	1,000	2,000	1,000	1,500
>£30m	2,000	4,000	2,000	3,000

All fees are subject to VAT at the current rate of (20%)

Confor adds more video content on new website

Confor has stepped up its leadership in the sector by launching a new website featuring more original video content to explain the wide-ranging benefits of forestry and timber.

Alongside member content and a library of key documents, the website is intended to help tackle the knowledge gap among the general public and those who influence public policy about the forestry and wood sector. This year, Confor has already produced a short film, *Our Forests Our People* – watched well over 3000 times – and *Animating Forestry*, which explains the link between wood products and local forests. This has also attracted around 3000 views on Vimeo and YouTube.

In addition, the new website features four short videos, which look at the breadth of benefits offered by forestry and wood. They are called: *Forestry and the Economy; Forestry and Climate Change; Forestry and People;* and *Forestry and the Environment*. Confor's current website received 10,000 unique visits a month, offering an excellent means to promote greater understanding of the sector – and the new site aims to build on this.

"This has been a very successful year for Confor so far and the website launch continues the positive momentum," said Confor's chief executive Stuart Goodall. "We have made real progress on highlighting the role of tree planting as part of a longer-term and more natural approach to flood prevention - and have worked hard to inform and engage members around the EU referendum.

"We have re-energised the All-Party Parlimentary Group with high-quality and well-atteneded discussions on these two subjects (flooding and the EU) and engaged constructively on numerous issues with Forestry Minister Rory Stewart."

Planting rates

Mr Goodall said Confor had also made real progress in convincing the Scottish Government that it needed to step up planting rates to protect a £1bn industry - by getting several key policy priorities into the SNP manifesto.

But he said the biggest issue of all was telling the positive forestry and timber story to a wider audience.

"We recognised some time ago that there was a clear need for simple visual materials to tell the forestry and timber story to a wider audience," he said. "We were delighted by Our Forests Our People and the positive reaction to it, and the animation has built on this. The new

The home page of the new website and, below, a still from *Forestry and the Economy*

"To be a successful sector, we need to tackle outdated misperceptions and demonstrate the significant benefits we provide to society.

videos take things a step further by appealing to different audiences and building out from the core messages.

"To be a successful sector, we need to tackle outdated misperceptions and demonstrate the significant benefits we provide to society. The videos, animation and now the new website - plus our continuing efforts to promote forestry and timber through the media - are vital to achieving that goal."

The new website was designed by Innovation Digital in Glasgow, with the initial internal work led by Confor's communications manager Stefanie Kaiser. The latter stages of the project were led by James Thomson, who is covering Stefanie's maternity leave.

Stuart Goodall said: "Stef and James have put a huge amount of work into the website and deserve great credit for delivering a more contemporary, functional and content-rich site. This reflects the way that Confor has raised its game and modernised its operations.

"This year so far, as well as the video and animation, we have produced very well-received documents on forestry and flooding, as well as gender and diversity in the sector. Our Scottish Parliament election document in Scotland led to us getting a very substantial section on forestry in the SNP's manifesto and we will be working closely with the new Scottish Government to deliver this."

Westminster

Confor has also refreshed the All-Party Parliamentary Group for Forestry at Westminster and held two very successful meetings – one on forestry and flooding, the other a debate on the EU referendum. Confor published a discussion paper on the potential implications of the referendum for the forestry and timber sector and also held a poll, which shows narrow support to remain in the European Union.

"All this activity is designed to raise the profile of the forestry and timber sector and ensure it is seen as a very significant economic sector which can also deliver substantial benefits for the environment and for society and people," said Mr Goodall. "Ultimately, if we can achieve this, our members and the whole sector will benefit greatly.

"We have had tremendous feedback about Confor's work this year from inside and outside the sector and we are determined to keep up the momentum. We hope everyone enjoys, and shares, these new short videos and further spreads the positive messages about the increasingly confident forestry and timber sector."

The new Confor website can be accessed at **www.confor.org.uk**

Confor at forefront of Europe debate

Confor has led the debate on the potential impact of the EU referendum on the forestry and timber sector by organising a meeting at Westminster, publishing a discussion paper and polling members to find out what they think about the issue.

The online poll showed 52 per cent of Confor members in favour of the UK remaining in the EU, with 48 per cent wanting to leave. When wider forestry interests beyond Confor members were included, the figures were 54:46 in favour of remain.

However, a show of hands at a meeting of the All-Party Parliamentary Group on Forestry (APPGF) to debate the EU referendum showed a 50:50 split between remain and leave.

Seven MPs and two Lords from all parts of the United Kingdom joined the passionate debate at the APPGF, with Confor members in attendance to hear the discussion and ask questions.

Chris Davies, APPGF Chair and MP for Brecon and Radnorshire, was in the chair and fellow Conservative MPs Anne-Marie Trevelyan (Berwick-upon-Tweed) and Heather Wheeler (South Derbyshire) spoke out in favour of the UK leaving the European Union.

Alex Cunningham, Labour's forestry spokesperson, was joined by Martyn Day and Calum Kerr (SNP) and Danny Kinahan (Ulster Unionist Party) in arguing the case to remain in the EU. Labour peer Lord Clark and his Conservative counterpart Lord Boswell, both vice-chairs of the APPGF, also took part.

Anne-Marie Trevelyan, also a vice-chair of the group, has taken an active role in the leave campaign. She argued that UK governments outside the EU would continue to support rural industries, including forestry. She said that "EU grants are our money" and insisted that good trade relationships with European neighbours will remain.

Alex Cunningham argued that there were lots of good examples where the EU benefited the forestry sector, including training grants for businesses. He also highlighted EU collaboration on nature and the environment, which delivered a sense of collective ownership. If the UK decided to leave, we would need to create a whole new set of laws irrespective of EU membership, he stressed.

There was also discussion around whether the UK 'gold plated' EU regulations, making them more onerous than they needed to be by taking a tougher stance than other countries. This is one of the issues covered in Confor's discussion paper on the EU referendum and the forestry and timber sector.

The paper, written by Guy Watt of John Clegg Consulting, examines six main areas where decisions made at European level have direct or indirect impacts on the forestry and timber industry. (see panel).

Stuart Goodall, Chief Executive of Confor, said: "We published the discussion paper to lay down some basic facts and to ensure that our members are well-informed about all the issues surrounding the EU referendum.

"Confor's role is to facilitate debate and provide information so our members can make an informed choice about the future of the forestry and timber sector within or outside the EU and what both alternatives mean for their business. It was also very important to make sure that politicians are considering the implications of a remain or leave vote for the forestry and timber sector."

How Europe influences the forestry and timber industry

- Direct financial support from the EU
- Regulations, red tape & bureaucracy
- Trade
- Plant health
- Labour market & Controlling UK borders
- The economy

> **Confor's role is to facilitate debate and provide information so our members can make an informed choice about the future of the forestry and timber sector within or outside the EU** Stuart Goodall

Anne-Marie Trevelyan (Conservative) and **Alex Cunningham** (Labour) were among seven MPs who took part in the debate on the EU referendum at a meeting of the All-Party Parliamentary Group on Forestry (APPGF). Here, they outline their arguments

OUT Anne-Marie Tr

I am passionate about forestry. I am calling on this Government to get 200 million trees planted during the lifetime of the current parliament, not the disappointing 11 million promised. I want 5 trees for every citizen, not 1 for every 5.

These trees will help reduce flood risks for future generations, provide employment and timber, a vital commodity for so many industries, and create attractive landscapes and opportunities for recreation.

And I would like to see them planted in an independent United Kingdom - outside an increasingly bloated and bureaucratic European Union.

As I said at the All-Party Parliamentary Group on Forestry meeting on the EU referendum recently, I think the EU is a car heading for a crash and we are stuck in the back. That's why I will be voting leave on June 23rd.

I believe wholeheartedly that the forestry and timber sector will be better outside the EU. At the moment, the UK pays around 6 billion euros into the Common Agricultural Policy and only gets 3.2 billion euros back - and it is inconceivable that UK governments outside the EU won't continue to support successful rural industries like forestry.

I am confident good trade relationships with our European neighbours will continue in the event of a vote to leave - and that the forestry and timber industry will thrive outside the European Union.

At the moment, the EU grants system favours farmers rather than foresters and my view is that the opportunities to persuade hill farmers to turn over part of their land to forestry are significantly greater outside the EU. We would be able to encourage mixed farming and forestry which the CAP does not. In terms of regulation, too, I think forestry would be better off in the event of a vote to leave. Complaints about the over-bureaucratic nature of the woodland creation process are frequent and the way that the UK tends to 'gold-plate' EU regulations certainly does not help.

The UK has been very poor at being there at the start of the legislative process to ensure effective regulations which suit the UK emerge at

evelyan

Anne-Maries Tevelyan during a recent visit to EGGER's Hexham factory

the end. I have much more faith in a sovereign UK parliament, stripped of the dead hand and high costs of EU membership, making the right decisions for our forestry and timber sector.

Quite simply, David Cameron's deal with the EU bureaucrats isn't good enough for the UK and the EU is not being reformed at all. So I think it's time to vote leave. For the forestry sector, that means voting for opportunity, not bureaucracy, and voting for progress and flexibility, determined by ourselves, not ever-increasing regulation and market stagnation.

Anne-Marie Trevelyan is Conservative MP for Berwick-upon-Tweed and Vice-Chair of the All-Party Parliamentaty Group on Forestry.

IN Alex Cunningham

The future of our country will be on the line when people go to the polls to decide whether Britain ought to remain strong in the European Union or risk isolation on the outside. The political, economic and social arguments for remaining are clear, but the environmental case cannot be overlooked.

Forests feature prominently in EU policies ranging from agriculture and rural development to climate and environment, industry and energy. We must consider this broad picture when we make our analysis, much as the EU Commission's new Forest Strategy has since its introduction in 2013 to meet the growing challenges foresters face.

The strategy leads the way for a more proactive EU, promoting sustainable forest management worldwide, combating deforestation and forest degradation as well as illegal logging. And it is through EU mechanisms such as the Timber Regulations that the import of illegal timber has been banned, with due diligence schemes guaranteeing that imported timber and wood products do not contribute to illegal deforestation or undermine legitimate European industry.

The Commission's strategy also highlights the important role of forests as carbon sinks and moderators of extreme weather events, including flooding. We need look no further than Pickering to see nature's potential in this regard, whilst the €2.6 billion in European Rural Development Programme funding for afforestation and forest management the UK stands to receive between 2014 and 2020 is key to unlocking this capacity.

With the Programme's core objectives including planting 14,000 hectares of new woodland, boosting productivity and competitiveness in farming and forestry, and creating jobs, it is clear that being part of Europe makes our forestry industry more robust.

The UK's forestry industry relies on the single market to procure vital raw materials, as well as for exports of UK-manufactured wood products. Only by voting to remain in the EU can we guarantee access to the single market and a

competitive trading environment.

Research, too, is critical and the EU Horizon 2020 programme finances the research into wood technologies and manufacturing that keeps us at the forefront and helps enable us to be a world leader.

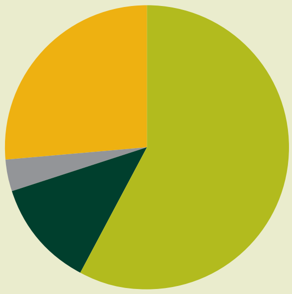
People in the forestry industry have a simple decision to make – to remain part of one of the world's biggest communities with an international strategy, or to vote for segregation and uncertainty.

Alex Cunningham MP is the Labour spokesperson on forestry and MP for Stockton North.

Stats confirm last year's double dip

by Confor Technical Director **Andrew Heald**

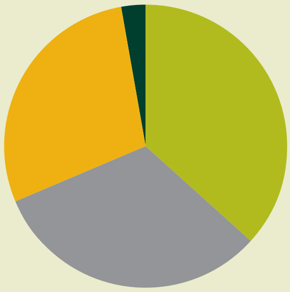
Fig 1: UK deliveries



Total: 10.8m green tonnes of roundwood (softwood and hardwood) (-6%), of which:

- Sawmills: 6.2m green tonnes (-8 %);
- Wood-based panels: 1.3m green tonnes (+4 %);
- Integrated pulp and paper mills: 0.4m green tonnes (-6 %);
- Other uses*: 2.8m green tonnes (-4 %).

Fig 2: production



- 4.0m tonnes of paper and paperboard (-10 %);
- 3.5m m^3 of sawnwood (-7 %);
- 3.1m m^3 of wood-based panels (no change);
- 0.3m tonnes of wood pellets and briquettes (-3 %)

Fig 3: wood imports

- 6.3m m^3 of sawnwood (-2 %);
- 3.2m m^3 of wood-based panels (-1 %);
- 9.7m m^3 of wood pellets (+38 %);
- 7.4m tonnes of pulp and paper (+1 %);

* includes round fencing, woodfuel, shavings and exports of roundwood

May is always an important month for those of us interested in forestry statistics, with both the National Statistics on UK Wood Production and Trade and the Timber Price Indices published.

The statistics and tables reveal much of what we already knew, that the market went back in 2015 compared to 2014, and that production and prices dropped.

Some key headlines are that:

"The average price for coniferous standing sales was £16.79 per m^3 over-bark standing in nominal terms in the year to March 2016, a decrease from £18.48 in the year to March 2015."

But this covers up some volatility in the market particularly for larger diameter material for example:

"The average price for softwood sawlog sales was £41.34 per m^3 overbark in nominal terms in the six-month period to March 2016, an increase from £38.63 in the six months to September 2015 but a decrease from £49.55 in the six months to March 2015."

One of the causes for this is fluctuation in the strength of Sterling against the Euro and Swedish Krona; as the pound strengthens imported sawn timber becomes cheaper and the demand for sawlog material decreases. Allied to some general economic nervousness, particularly impacting confidence in the construction sector, all helped to flatten the market.

In terms of products delivered in, this impacted all sectors apart from wood panels which actually increased by 4 % *(see fig 1)*.

This figure may also include some roundwood being used as fuel.

It is worth unpicking the figures a little further and looking at the wood import figures *(see fig 3)* and that the actual overall importation of sawnwood also decreased, which confirms the overall decline in the market. The standout figure is obviously the huge increase in the importation of wood pellets up by 38 %. It is worth noting that whilst the overall value of pellets is still significantly less than that of pulp and paper imports, it has risen from a very low level very rapidly.

The total value of wood product imports was £7.5bn (+5 %), of which £4.4bn was pulp and paper (+4 %).

Whilst these statistics tell us what happened in the past, most people in the sector are interested in the future, markets in late 2015 and early 2016 have definitely started to firm up. The value of Sterling vs the Euro and Swedish Krona has also weakened, due to uncertainty over the EU referendum. What happens on 23 June still seems unclear, but could market uncertainty over the referendum result be replaced by uncertainty over leadership in the Tory party, and potentially a change in PM?

Full copies of the stats are available at:
www.forestry.gov.uk/forestry/beeh-a9zjnu

Timber conference delegates learn market potential

More than 250 delegates attended the 2016 ICF National Conference: The Timber Supply Chain: Dynamics and Opportunities on 27-28 April in Newcastle. Keynote speaker Dr Peter Bonfield OBE, founder of Grown in Britain, challenged the conference delegates not to passively listen to the discussion, but to really "think what you can give". These sentiments were taken literally by many, as the conference saw a stimulating debate on the challenges and opportunities facing the sector.

One of the early discussions was whether the elephant in the room's name was 'monoculture', or 'cost'. Delegates learned that on one hand, the timber sector's dependence on Sitka spruce was creating an imbalance, one that threatened both adaption and market potential. Forest Research's Gary Kerr FICFor advocated that the strapline of the event should be 'Don't be afraid to diversify.' Meanwhile Session 2 Chair Tim Liddon FICFor, Forestry Director at Tilhill Forestry, put forward that there was little that could currently rival Sitka from a cost, social and environmental perspective. This feeling was echoed by both Elspeth McDonald MICFor, Scottish School of Forestry and Dr Dan Ridley Ellis, Edinburgh Napier University, who reminded us of the work that has gone into Sitka and the fact that our knowledge of the species' UK performance was so great.

Delegates appeared to agree that Britain is putting insufficient funds into research in this area, with the need for long-term experiments to assess new and existing species for market potential. The conference benefitted from overseas perspectives, with Professor John MacKay, Wood Professor of Forest Science at Oxford University, discussing American and Australian case studies and the potential of genomics to inform tree selection and breeding value.

Keynote speaker Dr Peter Bonfield OBE, Founder of Grown in Britain

Plans unveiled for 300m London timber skyscraper

Conceptual plans for what could become London's first timber skyscraper were presented in April to former Mayor of London Boris Johnson. The plans are for an 80-storey, 300m high wooden building integrated within the Barbican.

Researchers from Cambridge University's Department of Architecture are working with PLP Architecture and engineers Smith and Wallwork on the future development of tall timber buildings in central London.

The use of timber as a structural material in tall buildings is an area of emerging interest for its variety of potential benefits, the most obvious being that it is a renewable resource, unlike prevailing construction methods which use concrete and steel. The research is also investigating other potential benefits, such as reduced costs and improved construction timescales, increased fire resistance, and significant reduction in the overall weight of buildings.

The conceptual proposals being developed would create over 1,000 new residential units in a 1m sq ft mixed-use tower and mid-rise terraces in central London, integrated within the Barbican.

Dr Michael Ramage, Director of Cambridge's Centre for Natural Material Innovation, said: "If London is going to survive it needs to increasingly densify. One way is taller buildings. We believe people have a greater affinity for taller buildings in natural materials rather than steel and concrete towers. The fundamental premise is that timber and other natural materials are vastly underused and we don't give them nearly enough credit. Nearly every historic building, from King's College Chapel to Westminster Hall, has made extensive use of timber."

The tall timber buildings research also looks towards creating new design potentials with timber buildings, rather than simply copying the forms of steel and concrete construction. The transition to timber construction may have a wider positive impact on urban environments and built form, and offers opportunities not only to rethink the aesthetics of buildings, but also the structural methodologies informing their design as well, say the designers.

Dr Ramage added: "We've designed the architecture and engineering and demonstrated it will stand, but this is at a scale no one has attempted to build before. We are developing a new understanding of primary challenges in structure and construction. There is a lot of work ahead, but we are confident of meeting all the challenges before us."

The world's tallest timber building is currently a 14-storey apartment block in Bergen, Norway.

> **"The fundamental premise is that timber and other natural materials are vastly underused and we don't give them nearly enough credit.**

Creative woodworkers 'in praise of Slow'

Evergreen, a Scottish creative enterprise based in the heart of Edinburgh's old town, specialises in woodwork and in sourcing Scottish hardwoods to create beautiful commissions. The comapny also works with many other makers, forming part of larger trend towards creating more local sustainable business models, says Evergreen's Simon Baker.

Mr Baker said, "Evergreen embraces today's Slow Movement, which has at its heart the philosophy 'Think Global, Act Local' – a phrase first coined by cultural ecologist Patrick Geddes. As a society we are overscheduled, stressed and rushing towards the next task. This isn't restricted to our work environment – we rush our food, our family time and our leisure. Our fast-paced life has weakened the connections we have between people, place and culture.

"'Slow' can manifest itself in any design, object, space or image that supports local artisans, local designers, and local flavours. The main tenet of the Slow Movement is that by giving ourselves enough time to experience the various activities of our lives, we're able to get in touch with what is deeply satisfying and fulfilling.

"Evergreen works exclusively with Scottish hardwoods which we source from a number of hardwood timber mills around Scotland, making good use of the Association of Scottish Hardwood Sawmillers website (www.ashs.co.uk). Some of our wood is sourced directly through occasional tree work and wind fall.

"When commissions arrive we walk the client through various timber characteristics and finishes. Typically most work is done in house using a combination of handmade elements and an industrial laser and cutting machines.

"We're just starting to experiment with CNC routers and small Brettstapel style pieces in conjunction with our other maker friends. It's definitely an exciting time for small scale manufacturing as technology and tradition are creating endless new possibilities."

www.evergreen.scot

Norbord invests £95m in Inverness OSB mill

Confor member Norbord has announced one of the largest investments in Scotland for many years – and perhaps the biggest ever single investment in wood manufacturing in the UK.

The announcement in January of a £95m modernisation and expansion of the oriented strand board (OSB) mill in Inverness will nearly double mill capacity and secure the future of a key local employer.

There is growing demand for OSB in markets across the UK and Europe. The investment will upgrade the mill to continuous press technology and nearly double its production capacity, further securing Norbord's position as the largest global producer of OSB.

Norbord's investment on site will also see the construction of a biomass heat plant to utilise the biomass wood residue that is a by-product of the production process.

Announcing the investment, Karl Morris, managing director, Norbord Europe and a senior vice president of the company said, "Demand for OSB is increasing rapidly and this investment will ensure we can continue to meet customers' needs and remain at the forefront of the European industry".

Norbord is a significant local employer and it also plays a strategic role in the region's forestry sector as well as being a major user of haulage companies and port infrastructure.

The investment has been welcomed by local businesses operating in the forest sector. Neil Stoddart, regional harvesting and marketing manager in the north for Scottish Woodlands, commented "The recent news from Norbord about expansion plans is extremely positive. For over 25 years the plant at Dalcross has been the cornerstone of the local forest economy in the Highlands, with nearly every forest grower having supplied the mill either directly or indirectly.

"This investment will safeguard this position and kick on to provide the ongoing baseline confidence that a long term industry like forestry needs.

"I have heard from Highlands' based harvesting and haulage contractors, many of who, after the last shaky ten months in the trade, regard this level of decision from a multinational as a massively positive indicator. It has provided them with renewed hope and vision for their own futures".

The expanded mill is expected to come online in the second half of 2017, with no disruption to production in the interim.

Housebuilding boosts timber frame market in 2016

A new report on the 2016 timber frame market from MTW Research suggests the industry continues to outperform the UK economy, despite slowing slightly from recent double digit growth.

Based on data from 80 % of the timber frame market, the research found that 2016 profitability continues to strengthen as demand rises from housebuilding and commercial construction. However, MTW notes that there is some evidence of likely deceleration in growth for timber frame sales in H2 2016, though healthy trading patterns are forecast for 2017 and beyond.

According to the 200 page report, rising volume demand for timber frame homes over the last few years has sustained optimism with increasing market opportunities at both lower and higher value ends of the market in 2016. This has underpinned the timber frame market with MTW reporting some 80 % of timber frame suppliers having good or excellent credit ratings in 2016.

Discussing future prospects, MTW's research executive James Taylor commented, "Sustained demand for new housing, coupled with advances in timber frame technologies are set to stimulate growth in the timber frame market in the medium to longer term." Identifying a number of positive factors, the report forecasts sales growth of more than 30 % by 2020, underlining healthy opportunities and a promising future for the timber frame market.

www.marketresearchreports.co.uk

New campaign director joins Wood for Good

Wood for Good has appointed Christiane Lellig as its new campaign director. The organisation, which is jointly owned by Confor and Swedish Wood, aims to increase the use of timber across all potential markets in the UK. Christiane will be driving forward its new housing market campaign.

Based at the Building Centre in London, Christiane will work closely with industry bodies such as the Timber Trade Federation, British Woodworking Federation, Forestry Commission Scotland, the Structural Timber Association and with Wood for Good's supporting business partners to promote the greater use of timber.

A German national, Christiane comes with a wealth of international experience in marketing and communications in the civil engineering and environmental sector. She has previously worked with the Swiss Federal Office for Energy promoting energy efficient building construction and with building insurers marketing better structural protection against natural hazards.

Stuart Goodall, Confor chief executive and a director of Wood for Good, said "We are genuinely excited about Christiane coming on board. She has the skills, experience and strategic approach necessary to lead the campaign as well as the confidence to engage with all relevant partners in promoting the wonders of wood.

"Christiane joins us as we concentrate on the role of timber in meeting the housing challenge – the need for a million new homes by 2020, which can only realistically be achieved by embracing timber and in the development of off-site construction methods. The campaign kicks off with a series of four inspirational conferences across Britain and the publication of 'The Modern Timber House' by esteemed architect Peter Wilson covering the use of timber in a range of buildings."

www.woodforgood.com

The Norwegian way: a model for Scotland?

Dr Duncan Haley, Norwegian Institute of Nature Research (NINA), says we should look to Norway as Scotland debates woodland expansion

Apart from fjords, one of the few things most people in Scotland know about the landscape of Norway is that it's well wooded and always has been.

But this is one of those cases where most people know wrong – 100 years ago "it was commonly believed that our (Norwegian) forests would soon no longer exist, and initiatives were implemented to counteract the deforestation" according to *Statistics Norway, introduction to forestry statistics.*

Since that time the forest resource of Norway has more than tripled by most forms of measurement. In 2004-2014 alone the total area of forest increased by 18%. Deciduous and mixed woodland has more than doubled in volume in the last 20 years alone – all of it through natural regeneration and all of it 'for free' (our statistics don't tell us the proportion of pure conifer woodland in which regeneration is actively managed for forestry).

In a time where the Scottish Government and many communities, landowners and conservation groups wish to expand Scotland's woodlands for reasons including forestry, nature restoration, carbon sequestration, soil conservation, flood prevention, stabilizing slopes against landslips, and public enjoyment, it's worth taking a look at how this happened in a place which is so similar in the basic conditions of life – geology, landforms and climate – to the Highlands of Scotland.

For those purposes, we need to look at what has happened in south west Norway in particular. Norway is a large place, the size of Britain and Ireland, and parts of it are colder and/or drier than the Highlands. Foresters from Britain usually visit the large forestry operations of eastern Norway, near the Swedish border. It is the driest and coldest part of Norway; the terrain is broad and rolling. This can give a very misleading impression if taken as the norm for all of Norway in climate, in landforms, or in forestry practices. South west Norway is at the same latitudes as the north mainland of Scotland to Shetland. Like the Highlands its climate is dominated by the Gulf Stream and weather systems from the south west. This produces very similar rainfall, wind, and temperature patterns. The geology and landforms are also very like the Highlands. Detailed comparisons can be found at www.nina.no/english/News/News-article/ArticleId/3941 or you can investigate the climate of south west Norway for yourself in very great detail at www.senorge.no (and of the Highlands at www.metoffice.gov.uk/).

Ice Age and deforestation

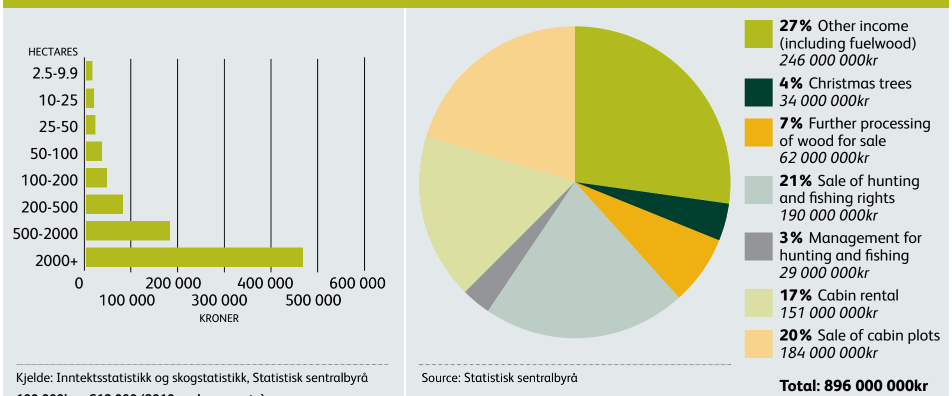
People arrived in south west Norway at about the same time as in the Highlands, at the end of the last Ice Age and they introduced agriculture and domestic animals, and started using metal tools, at about the same times. In the very similar climate and landforms, the effect was also very similar: deforestation was mostly complete in coastal areas by the Bronze Age, and continued inland for many centuries. By the 19th century, both south west Norway and the Highlands had been strongly deforested for a long time. As in the Highlands, peat was the main fuel in south west Norway, and drystane dykes were built for miles across the treeless glens and hillsides. Wood for fuel or fencing was unavailable locally, and too expensive to import. Photographs from the late 19th and early 20th centuries look strikingly like many parts of the Highlands.

But since then the landscape histories of the two areas have diverged radically.

In the Highlands, apart from commercial forests which started to be established after the First World War, no significant expansion of woodland occurred in the 20th century, and in general the state of remaining seminatural woodlands continued to decline.

In south west Norway, new woodlands began naturally regenerating from the 1860s on. In recent decades the landscape has

Average income from forestry for private individuals owning woodland by woodland area, kroner and (right) Income streams from samewoodland by percentage



Kjelde: Inntektsstatistikk og skogstatistikk, Statistisk sentralbyrå
100 000kr = €12 000 (2010 exchange rate)

Source: Statistisk sentralbyrå

Kirkehamn (left) is on the same latitude as Stornoway, though the exposure is like the west coast of Harris – direct exposure to open ocean with no intervening islands. Storm force winds are experienced every year, force 11 every other year, and force 12 twice in the last 10 years. Pollen data indicates treeless for over 4000 years before regrowth started last century.

Peat cutting (below) could have been an accurate depiction of Norway any time between the 1920s and 1950s before regeneration of woodland took hold

changed from one which was mainly unwooded within living memory, to one where most of the land below the treeline is now wooded once again. This process is continuing at a very rapid rate. In Rogaland, the most deforested province of all, in the far south west, woodland cover is predicted to increase from 24% in 2007 to 52% over the next few decades, with most of the remaining area being either arable farmland or high mountains above the natural tree line. In the region as a whole, at present 2.6% of the land area is changing from open ground to woodland every five years.

What caused this? Much research has been done, and the answer is clear: reductions in grazing pressure, and associated land use practices such as muirburn. This was because of two main waves of reduction in the intensity of grazing on the land. The first was from the 1860s to 1914, due to mass voluntary emigration to the United States; the second from the 1950s on as other ways of making a living other than hill farming became widely available, and were considered more attractive.

Berdalen is in the Bykle mountains, same latitude as Fair Isle with same climate and geology as the Cairngorms. Point of shot is about 900m, with highest peaks 1300m, and valley floor running left to right in distance about 700m. Old maps and open-ground place names indicate Berdalen was almost wholly deforested for a long time; almost everything in shot grew back in the 20th century.

Much of this regeneration has happened on peat soils, often wet and deep, which formed during the period of deforestation; trees will regenerate strongly (and start to form a new, non-peat, soil layer) so long as the peat is not permanently waterlogged. Birch in particular likes wet peat, and is often the pioneer species. Even on blanket bogs, trees are usual on any slightly raised or slightly drier patch.

Woodland of this sort is variable in density and composition on small-medium scales. Pole stands of conifer are common, but much is more open in character – many plants in Scotland often thought to be 'moorland' species like heather and bearberry are really plants of the understory of open woodland that can tolerate wholly open ground. Sheep and cows are still grazed, at moderate densities and gain both valuable shelter, and better quality forage from ground layer grasses and forbs. It is, and always has been, a landscape used by people.

Nowadays, wood has completely replaced peat as fuel (wood is about one third better than the same weight of sod peat as a heat source), and is widely sold; the average Norwegian household consumed 816kg in 2009. In many areas conifers are harvested for timber in small coups

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Fidjadalen, which 60 years back was treeless (inset)
Main photo David Hetherington

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or even as individual trees, and marketed, through private forestry cooperatives.

This landscape contains a diverse wildlife – among game species, an important income stream in rural Norway, red and roe deer, blue hare, capercaillie, black and willow (the local form of red) grouse, and woodcock among others are all common and carefully managed as part of the mix of forestry uses.

Woodland of this type is thus a very significant economic resource to rural communities in Norway, exploited in diverse ways. The pie chart indicates income streams from woodland, not including timber and also excluding the important livestock use (because sheep and cattle are free range in these areas, so statistics can't say to what extent they used woodland). Figure one shows forestry income for private individuals, who own 80 % of the Norwegian forest resource by area. It is both significant in itself, and additional to the income streams from the same woodland shown in the pie chart.

Broader view

The experience of south west Norway shows clearly that woodland could regenerate very widely in the Highlands – the climate and landforms are very similar, as has been the history of the landscape until very recently. Planting, to provide a local seed source, would probably accelerate the process greatly; in Norway regeneration seems to have started slowly and then accelerated, probably for this reason.

Norway also shows that this land is in no sense 'lost' for economic purposes. A broader view of what woodland is for, and how it can be managed to produce optimal economic and other outcomes, can therefore be gained by study of practice in Norway or – dare one say it – parts of southern England.

Storms and flooding

Another benefit may be reductions in damage from extreme rain events. Storm Desmond hit north England and south Scotland on 4 December last year, and south west Norway the following day. Rainfall was even higher in south west Norway than in the worst affected parts of Britain and, like Britain, followed a wet November. The estimate of insurance claims for damage caused by Desmond, expressed per capita of the main affected areas, was €289 in Britain; and €30 in Norway (in absolute terms, €834m to €32m). This would need further research, but more than a nine fold difference per capita is striking.

South west Norway is no longer expensive to visit; the recent decline in oil prices has led to a 30 % increase in the value of the pound against the krone. Rental cabins are inexpensive and car rental prices much as the UK. Why not go and see for yourself, and draw your own conclusions?

Download a copy of Duncan's presentation:
www.confor.org.uk/resources/publications/reference-publications/

Conference will focus on economics of forestry

Confor has joined forces with the Royal Forestry Society to organise a major conference on the economics of forest ownership this autumn.

The event – *Making Woodlands Pay* – will see a range of expert speakers in forestry and finance address the perennial challenge of how to make money out of woodlands.

The economics of forest management have changed dramatically in recent years and the event, jointly hosted by Confor and the Royal Forestry Society, will advise owners how to tap into new and emerging opportunities.

Expert speakers will discuss what the market wants, compare and contrast silviculture systems and suggest how owners can add value to their woodlands – using timber and non-timber products - to achieve financial sustainability.

The event, sponsored by Tilhill Forestry and supported by the NDG James Memorial Fund, takes place at the National Memorial Arboretum in Staffordshire on 1st November.

Sir Harry Studholme, Chairman of the Forestry Commission and a highly experienced adviser on forest investment, will deliver an overview of the key issues to consider to achieve profitable woodland management.

Other confirmed speakers include: Oliver Combe (Timber Auctions), Justin Mumford (Lockhart Garratt), Jason Sinden (Tilhill Forestry), Dr Steve Lee and Dr Gary Kerr (both Forest Research). Dr Jenny Wong from the University of Bangor will look at the opportunities for woodland owners presented by non-timber products. Three case studies, covering both wood and non-wood products, will also feature in the conference.

The event will be co-chaired by the RFS President Sophie Churchill and Confor's event and communications specialist David Lee.

Stuart Goodall, Chief Executive of Confor, said: "Active woodland management is key to the future health of our rural economy – and active management depends upon woodland owners making well-informed decisions. This event is all about delivering the information and intelligence needed to make those decisions. Confor is pleased to be partnering with the RFS and I look forward to a very relevant and useful event."

Royal Forestry Society Chief Executive Simon Lloyd said: "It is vital that landowners and managers have a good understanding of the economics of woodland management. A profitable woodland is more likely to be managed. That is good not only for the owner and the local economy, but also for the health and vigour of trees and wildlife.

"The RFS is delighted to be partnering with Confor to host a conference on this important topic. The conference showcases many recent developments in woodland management practice and markets for wood products which provide opportunities for woodland owners to improve returns and add value to their woodlands."

Full details and tickets (priced at £80 plus VAT) are available at www.rfs.org.uk with limited early bird availability.

Chairman of the Forestry Commission Sir Harry Studholme will deliver an overview of the key issues in profitable woodland management

SAVE THE DATE 1 NOVEMBER 2016

Market starts to creep up

Timber Auctions market report by **Oliver Combe**

The spring of 2016 has seen a gradual improvement in market conditions throughout the mainland of UK. I have looked at three main market areas to try and identify the market trends in each area.

After a harsh downturn in late 2015 the market has stabilised over the winter and now started to slowly creep back upwards, this is largely supply driven. There has been a steady weakening of the pound against the euro over the first half of 2016. This is now making the importers look to increase their UK selling prices, there is however still a lot of imported carcassing timber in the supply chain. The outlook for the UK timber market hopefully remains one of modest recovery.

If you wish to discuss parcels of timber or for further information please contact Oliver Combe on 07771 958975, oliver.combe@timberauctions.co.uk for free independent marketing advice.

Wales & south England

Supply Again in Wales and the South of England it appears that the private sector has been cautious in bringing timber to the market in 2016. This coupled with NRW's new marketing concept has led to less timber available to buy and has translated into a very tight supply situation currently.
April and May have seen an increase in offerings from the private sector (FIM, Tilhill and independent managers) which is at last giving buyers the chance to fill the gaps in their forward supplies.

Demand Wales and the South of England have a very diverse range of markets many of which are versatile.
Many of the processors operate either in niche markets or a number of different market sectors; this coupled with being close to the major markets has meant demand has remained pretty constant. This has given the market great resilience and has meant whilst the prices did not hit the peaks that the North saw 12 to 24 months ago it has not seen the slump that they have experienced in the last 6 months.
Competition to buy timber has remained strong from board mills, sawmills, fencing manufacturers and energy wood users all of whom have seen a seasonal upturn in demand over the last few months.
Sawmills specialising in fencing products had a late start to the fencing season but the good weather since mid April has kick started this market and has quickly lead to reduced yard stocks and increased order lead times. Some mills are now quoting a four week lead time on new enquiries which is a sudden and welcome "ex stock "situation of two months ago.
Prices have remained strong in Wales for most crop types but especially sawlog crops. Good large parcels of easily worked sawlog crops close to sawmills have been seeing prices pushing towards £40 per tonne standing.

Summary Strong demand for good quality crops especially FSC certified spruce and Douglas fir with excellent prices being achieved.

North Scotland

Supply Whilst the Forestry Commission have marketed their planned volumes this year the offerings from the private sector appear to be lower than in previous years. Maybe this is a response to the fall in prices seen in the second half of 2015. Sawlogs and small roundwood prices fell back by approximately 20 %; this meant that a lot of marginal crops and lower value thinning have been put on the back burner so restricting the overall volume offered to the market. Supply has stabilised now at a lower level than a year ago as growers adjust their plans to the lower price levels.

Demand Although the falling pound against the euro has led the timber importers to look for price increases and finally given the domestic producers an opportunity to try and push their prices up, the market is currently steady and strongly resisting price increases. There are still high stocks of carcassing timber and most pallet and fencing customers have good stocks, lead times on orders are increasing, processors are starting to see some space in their stock yards but the spring rush is really just getting going. Market conditions have meant that most processors have been running in 3rd and 4th gear this spring and have not had to shift into higher gears yet so intake of sawlogs is also steady.
Export of small roundwood has virtually stopped although there is some export of sawlog material from the west coast to Ireland currently so the market demand is dependent on activity levels of domestic processors.
There are signs in early May that demand for sawlog material is picking up and forest stocks are now declining. As the days get longer and the weather improves output from the forests will increase but it will not take a big upturn in demand to create shortages of prime sawlogs in some areas.

Summary The market has stabilised at a level approximately 20 % lower than its peak 12 to 24 months ago, domestic demand is starting to increase thanks to exchange rates and seasonal upturn in demand.

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South Scotland & north England

Supply It appears that less timber has been offered to the market in the Borders this spring than in recent years and that which has been offered has hit the market one to two months later than normal. Again growers have seen the decline in the market by anything up to 20 % in the second half of 2015 and adjusted their plans accordingly leading to reduced overall supply.

The February offerings attracted good interest and saw some good prices whilst those offered in March and April have seen further modest price increases due to improved exchange rates and domestic demand. As the prices have improved this spring we have seen more timber coming to the market in April and May which has allowed buyers to purchase their requirements for the second and third quarters.

Demand Whilst the sawlog market in the Borders slowed down noticeably in the second half of 2015 for the same reasons as the North of Scotland the small roundwood demand remained strong. Sawlog prices did fall back by about 20 % in the second half of 2015 but stabilised in December and January and began to show modest increases in February of around 5 %. Small round wood and energy wood prices did not fall back by the same amount and demand remained strong throughout winter. Standing prices for small roundwood crops remained good and allowed merchants to redeploy contractor resources into lower grade crops and reduce supplies of sawlogs to balance with the lower demand. Whereas the sawlog market in the North of Scotland is heavily dependent on kiln dried carcassing sales the Borders has a more diverse customer range selling into the fencing and pallet markets. February and March saw signs of improvement in these markets and led these mills to look to secure raw material supplies for the second quarter and in doing so pushed prices up.

May has seen an improvement in the market in general which has lead to an increased production and uplift of sawlogs from the forest

Despite planned shutdowns at Land Energy in Girvan, Caledonian paper, Iggesund and the Lockerbie power plant, demand for small roundwood and energy wood remains good in the Borders. The shutdowns have seen a temporary build up of roadside stocks but the material is still moving through the supply chain.

Summary After positive developments in February, March and April of between 5 and 10 % the market has stabilised again in the Borders during May as supply and demand have come back into balance.

Apparent uplift but underlying economic data is still poor

Timber market report by **Peter Whitfield** Timber Operations Director Tilhill Forestry

On the face of it a weaker sterling and increased demand from the sawmills would appear to be good news. It has begun to encourage forest owners to push more standing timber to the market after a relative dearth of standing sales over the winter. However the underlying drivers are not encouraging; Howard Archer, chief UK and European economist at IHS Global Insight, is quoted as saying: “There is now compelling evidence that heightened uncertainty ahead of June’s referendum on EU membership is taking an increasing toll on economic activity.” So is it Brexit alone that creates all this uncertainty? Probably not, as I indicated in my last piece earlier in the year there are a number of other global factors that bear on the health of the UK and indeed world economies.

Construction sector data for April 2016 signalled a further loss of momentum across the UK, with new order volumes stagnating and optimism starting to dampen. Commercial building was the strongest performing broad category of activity in April, although the latest upturn was the slowest since July 2013. Residential construction growth rebounded only slightly from March’s 38-month low, while civil engineering activity expanded at its weakest pace so far in 2016. The overall slowdown in construction output growth largely reflected stagnating new business volumes in April. Moreover, the latest survey signalled the weakest momentum for exactly three years. Construction firms signalled a renewed decline in confidence about the year-ahead business outlook in April, thereby resuming the general downward trend seen since June 2015. The latest reading pointed to the weakest degree of positive sentiment for almost three years, which survey respondents mainly linked to stagnating new business volumes and a lack of new invitations to tender.

The latest PMI survey indicated the UK’s services sector grew at its slowest pace in three years in April. The services PMI reading fell to 52.3 from 53.7 in March. A reading above 50 indicates growth. Research firm Markit said its Purchasing Managers’ Index (PMI) surveys for April pointed to growth of just 0.1 % in the month.

The increased sawmill demand mentioned above has been substantially driven by demand for sawn fencing rather than carcassing timber. The good news has been that there are very few harvesting sites with any stock of logs at roadside and mills are chasing every available log. Some mills have found it challenging to keep log stocks at a manageable level to allow for the mix of products they are cutting. Imports still continue despite a weaker sterling, and in particular there still appears to be a strong flow of Swedish sawn timber landing in the UK. For the most part this is due to a continued lack of demand from Asia and N Africa. The UK remains the default export destination for Swedish sawn goods due to location and well established shipping and marketing links. Capacity in Sweden continues to grow both in sawmilling and pulp production. Ireland also continues to push in cheap fencing products that compete head on with our domestic offering.

Nothing in forestry and timber is ever straightforward and as we see an uplift in log demand we have seen a significant decline in small roundwood demand in the first half of the year. If only our customers would understand, we have to sell the whole of the tree not just one end or the other! Some of this was known and planned as a number of major biomass markets have taken long maintenance shuts in the first part of the year. In the north Balcas’s Invergordon pellet plant has a breakdown which may take it off line for a number of weeks and Landenergy’s Girvan plant is running up to a modification shut that will last through June, although re-opening thereafter with increased capacity.

> **“ Nothing in forestry and timber is ever straightforward and as we see an uplift in log demand we have seen a significant decline in small roundwood demand**

Demand for biomass has been reasonable, but the milder winter has yet again had a negative impact on firewood demand. The continuous review by government and associated uncertainty around subsidies for biomass has clearly slowed development of both medium and large scale projects. The only ones that have happened are using waste wood and there is likely to be a shortage of this as a result by the end of 2017.

So no stability for the market in the near future, but that is nothing new and we seem to be able to face and deal with the challenges in a manner that works but is far from ideal.

Market holds steady but tinged with caution

Forest market report by **Fenning Welstead**, of John Clegg & Co

It is amazing how quickly we forget the dark and wet of winter; with leaf burst and the energy of spring, everything takes on a much brighter optimism. However, it has been a slow spring with little to report other than steady interest in the market tinged by some caution about investing in Scotland where, of course, the bulk of commercial forests are located.

Perhaps there has been an element of taking stock after the very significant growth in values over the last decade but also a need to consider what the future holds in the light of various elections and referenda in the immediate future. The timber trade has seen fluctuations in price driven by exchange rate movements and the level of general economic activity, particularly in the construction industry. The demand from the biomass sector has undoubtedly been of significant help to some harvesting operations.

Reflecting on activity towards the end of last year and the first quarter of 2016, there were a number of interesting sales. The largest of these of course was the sale of The Barracks by John Clegg & Co on behalf of the Forestry Commission in Scotland. Extending to almost 4,500ha, this extensive block of commercial forestry sits astride the West Highland Railway Line, close to Rannoch Moor. This has been acquired by a private investor at a sale price of £9.5m. This is a large investment in forestry, but on a hectare basis the price is relatively modest at just over £2,100 per ha. There are unlikely to be any new disposals from FCS as a result of the Land Reform Bill and community empowerment; therefore, private sales will dominate the market from hereon in.

At the other end of the age scale, a modest area of clear-felled land to the south of Edinburgh amounting to 27ha in total, which now carries a liability to replant, achieved a sale price of £3,000 per ha. This price reflects better quality land, proximity to the capital and the fact that the total price is within the budget of many more people.

Commercial strength

The first property of really solid commercial spruce that John Clegg & Co marketed in 2016 was Black Stockarton Forest near Castle Douglas. This extended to 144ha with a guide price of £1.285m. At a competitive closing date it sold at comfortably over 25% above guide. Strong interest was exhibited in this property, which hopefully reflects continued strength in the demand for commercial coniferous forestry with relatively predictable production forecast.

At the time of writing, John Clegg & Co has just put on to the market Hartside Hill Forest, 394ha of coniferous forestry to the south-east of Edinburgh. Planted between 1984 and 1990 and with a guide price of £3.45m, this is already attracting interest. The website marketing of this property includes video footage shot from a drone flying above the forest.

Bidwells is in the process of preparing for market two extensive properties. Knockower Forest in Galloway extends to 748ha in total but only 131ha is planted. The mixed conifers laid out in scalloped blocks with wide rides are growing well and there may be scope to extend planting. The guide price is £1.2m.

A more conventional forest but on a much larger scale is Glen Massan in the hills behind Dunoon. Bidwells will be asking over £9m for this extensive commercial forest, which includes a 4-bedroom cottage and an Approved Site for a new main house. Only a few minutes by helicopter from Glasgow Airport, this promises to be an interesting sale.

At the amenity end of the spectrum, Bandodle Wood to the west of Aberdeen, generated reasonable interest. Only 21ha in size and about 15 years old, this Farm Woodland Scheme project is entirely of broadleaved trees and is very much an amenity woodland that could, in the future, produce firewood and the odd hardwood stick. The sale price equates to about £3,600 per ha.

Savills have Tomchrasky on the market. Just over 200ha of mixed Scots and Lodgepole pine, this attractive forest should be a popular buy but it has access limitations and the species content is less productive than the site could carry. With a reduced guide price of £625,000, it now has potential and, being set in stunning scenery, is worth a look.

The same agents now have Monachyle Wood under offer (probably settled by the time you read this). 647ha in total and with some excellent crops situated in Rob Roy country, it forms its own glen with waterfalls and pano-

Continued on p22

Black Stockarton Wood near Castle Douglas, 144ha of commercial spruce, sold for "comfortably over 25%" above a guide price £1.285m.

Continued from p20

ramic views. The minor public road is, again, the real issue as it was not built with timber wagons in mind.

Further south, the burst of bluebells has prompted the usual flurry of properties on to the market in time for the "carpet of blue". John Clegg & Co's Buckinghamshire office has released 19 new properties to the market over the past six weeks. Many of these are commercial and, unusually, several are clustered in South Wales.

Surrey prize

Since November, there have been several notable woodlands sold in England and Wales. Of most significance was the sale of a large, principally pine and native broadleave woodland in deepest Surrey, where urban and amenity pressures are high. The Hurtwood, totalling over 120ha in five small lots, with a further two larger woodland parcels of 84ha and 37ha, was sold to two private buyers at a price in excess of £1.3m. This sale showed just how well a large area in rural Surrey could sell when priced and lotted correctly.

Travelling further west, there have also been a number of good commercial woodlands sold in Wales, which included 55ha known as Nant Efail, a maturing spruce plantation situated almost on the roof of Wales, close to the edge of Snowdonia. This sold for well above the guide of £310,000. Dolberthog, 16ha on the edge of Rhyader, where a combination of replanted crops and mature Douglas fir served to attract people with various objectives, eventually sold nicely in excess of the £140,000 guide price.

Moving south and into Devon, of particular significance was South Hayne Woodland, over 36 hectares of half and half commercial conifers and replanted broadleaves, where government policy and commercial requirements prompted good debate on the future of a large area of native broadleaved replanting. This did not quite make the guide of £260,000.

Quality counts

The general summary seems to be that good commercial forests are still sought after and attract competitive bidding but that secondary quality or remote forests are viewed with more caution. Issues with minor public roads have become more relevant as harvesting increases the pressure from timber traffic and council budgets are stretched. Further south in the country, demand for woodland remains strong with supply and demand in reasonable balance.

Disease issues seem to have receded somewhat and do not appear to be a major factor in investment decisions. At the time of writing, there are a number of properties being readied for marketing. These include solid blocks of Sitka spruce in the south of Scotland and also a range of woodlands across the country. With the Scottish Election now behind us and a more balanced Parliament taking shape, we move forward to the EU Referendum. We could ponder on the ramifications of that for a good while – just remember the trees will still be growing!

Don't panic over land reform

COMMENT
That's the view of **David Hall**, of Hall Baird Solicitors

Land reform has been a hot topic in Scotland for quite some time and many connotations have sprung up around the phrase. It's time for a brief look at what the impact may actually be on forestry ownership.

The Land Reform Act is split into 12 parts covering such diverse topics as small land ownings, deer management, Common Good land and additions to the agricultural holdings legislation in Scotland among others.

An obsession seems to have sprung up regarding transparency of land ownership and the Act has a part dealing with this. For the most part this will be of an irrelevance with only an extremely small number of people concerned about cloaking ownership. The parts of the Act that I believe will be of most interest to forest owners are the parts dealing with community engagement and the right to buy for sustainable development.

The devil is always in the detail and much of the detail regarding the legislation will be flushed out in secondary legislation but in basic terms communities require to be engaged in any decisions relating to the land that may affect the community.

Standards of practice will be established and providing these are adhered to and followed in an appropriate manner then the obligation will have been complied with. Much of this quite probably already takes place albeit under a different guise with the Forestry Commission and other bodies.

Of more concern is the right to buy by community bodies where current land ownership is hindering sustainable development. All very noble aspirations some might say. Of critical importance is the requirement that sustainable community development is being stifled. In my experience the vast majority of landowners are open and alive to development opportunities and as such these provisions are perhaps not the terror they may appear.

There will be quite specific definitions of community, sustainable development and the manner in which a landowner is acting as a barrier. There are also quite specific provisions regarding a significant community benefit. There are compensation provisions and there is an appeals procedure virtually every step of the way. The situation is somewhat more akin to a compulsory purchase as opposed to an unknown entity cherry picking the best of a landowner's ownership.

It is probable there will be a challenge of the legislation by some of the significant land holding interest in Scotland as being a breach of the European Convention protocols – the right to peaceful enjoyment of your possessions.

All in all the spectre of land reform should not be taken as a discouragement to forestry investment in Scotland.

David Hall, of Hall Baird Solicitors, is a member of The Law Society of Scotland rural affairs sub-Committee which advised on and inputted to content on the final legislation of the Land Reform Bill. The committee also advises on other legal issues affecting rural affairs in Scotland. He is also a member of Royal Scottish Forestry Society (RSFS), a member of Agricultural Law Association and a member of South West Agricultural Valuers Association.

Final Draft of UKWAS 4th Edition

A Final Draft of the UKWAS 4th Edition has been completed by the UKWAS Steering Group following more than two years of work. Forestry interests were well represented in the drafting group by Ewan McIntosh of Tilhill, Andrew Heald of Confor and especially by Stuart Wilkie of Scottish Woodlands who attended every meeting.

UKWAS Executive Chair, Peter Wilson said: "I am absolutely delighted that the Steering Group has now concluded a Final Draft: UKWAS 4 represents the most comprehensive review of UKWAS since its 1999 launch. The draft has been formally presented to FSC UK and PEFC UK which are the two schemes using the UKWAS as a basis for their national certification standards in the UK. Both will now prepare the documentation and submit the UKWAS 4 to their international parent bodies for approval.

Peter added that "Users should be aware that some further changes might be requested by FSC or PEFC to meet their scheme requirements but the target is for UKWAS 4 to be confirmed and published in late 2016."

Andrew Heald of Confor stated that he was broadly happy with the revision, particularly now that all the requirements are clearly identified as requirements, and that there is a much logical approach to the ordering the sections. "Obviously we would have liked to have achieved more but the process is about building consensus; we hope that both FSC and PEFC international will recognize that consensus and balanced input, and quickly process UKWAS."

Andrew would like to thank the many Confor members who helped work on this revision, especially to Ewan and Stuart.

"Any revision process is not only great opportunity to improve the standard but also to build dialogue and understanding with organisations such as RSPB and the Woodland Trust."


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Importance of biomass sector must be recognised

Edward Billington, Strategy Director, Billington Bioenergy, calls for a strategy to bring stability to a vital part of the renewables sector

The Department of Energy and Climate Change (DECC) is currently reviewing the Renewable Heat Incentive (RHI) Scheme. Its decision will have a huge effect on more than just our carbon emissions.

Launched in November 2011 the RHI has already proved its worth. Some 65,000 properties in the UK have converted to renewable heating, with biomass boilers generating the lion's share of the heat. This is important because heat is one of the most difficult markets for us to decarbonise (the others being transport and the generation of electricity).

This is leading to significant carbon savings, especially when you consider that most of these properties are converting to renewables from heating oil and LPG.

And the RHI isn't only reducing emissions. In the case of biomass, a new industry has sprung up to meet demand. It's created an entirely new supply chain from forest to pellet mill to customer.

Nine ENplus certified compressed wood pellet mills have opened, and 33 ENplus pellet trading businesses and hundreds of biomass boiler installer business have been set up, creating thousands of jobs – the majority of which are in rural areas of the UK.

As a result of this new demand, woody material from the forest industry (like thinnings and woodchip) now has a healthy market. In turn, that's encouraging more efficient forest management and productivity. This is not a threat as there are many undermanaged woodlands which conservationists and foresters alike agree will benefit from having a market for otherwise unsaleable harvest.

At the same time, compressed wood pellets are also being imported for use in biomass boilers from sustainably managed working forests in the US, Canada, Sweden and beyond. This is good for the UK's energy security.

In many of these countries, biomass heating is part of the heritage. Sweden has provided much of its energy needs from working forests for many years, as have other neighbours of ours. It's at the heart of their strategic plan for a low carbon future. The UK is lagging far behind every European country in this regard, other than Malta. This situation might be funny for Eurovision, but is more serious when it involves renewable energy.

Not because sustainable biomass is scarce. Far from it. In fact, there is a secure substantial global supply of sustainable biomass that can replace some of our fossil fuel dependence.

We simply need a clear overarching and stable strategy for renewables such as compressed wood pellets to take their proper place in our energy mix. All in all, a vast amount of progress has been made in this field since the RHI was launched.

That's why it's so important that the RHI review does not draw the wrong conclusions. DECC has already made it clear that it wants to promote heat technologies that haven't yet achieved significant take up. But it is proposing to do this by effectively shutting down a nascent industry of small- and medium-sized biomass producers, suppliers and boiler installers. Not only would this destroy jobs and businesses along the whole supply chain, it will also reduce the UK's ability to meet its renewable heat targets in 2020.

A 'coming of age' for woodfuel

Following its acquisition by AMP, Forest Fuels's Managing Director **Peter Solly** highlights its role in consolidating the woodfuel supply chain and developing the market for low-grade softwood

Since the commercial Renewable Heat Incentive (RHI) was launched in the UK in 2011, the woodfuel industry has grown quickly. While this has created new markets for softwood chipwood and helped to drive up roadside prices for growers, it has also grown a new industry of businesses supplying wood chip and wood pellet fuel to the end customer.

Over the past five years, the market has quickly evolved, with many new businesses starting to supply wood chip to the end customer. Some of these have been forestry and estate businesses diversifying, looking to add value to timber by supplying wood chip for customers' boilers.

The growth in the market is driven by the government RHI subsidies, which encourage new boiler installation; as the subsidy for new entrants is reduced, growth in the fuel supply market slows.

Now that the fast growth in the market over the last few years looks to be slowing, many players in the industry are looking at the future and making decisions on the best way forward. For some, their businesses have grown bigger than they had planned and have become slightly unwieldy, while others are not large enough to yet be commercially viable.

Forest Fuels has recently linked up with Anglia Biofuels, which is based on the Sotterly Estate in Suffolk. Anglia Biofuels grew from the estate's diversification into woodfuel supply, and had a customer base of local biomass boilers it was supplying to. It had grown to a size that was too large to manage with the existing resources, but too small to warrant the overhead of being a stand-alone business.

Having worked closely together for a while, Forest Fuels has now purchased the business and taken on the customer base. We rent a depot on the estate and buy estate timber – thus giving Sotterley the benefits of the added-value they originally set out to achieve, but without the costs and hassle of dealing with end-user customers.

Our model at Forest Fuels is to have specialist local managers looking after local depots and customers, backed up by head office support and dedicated logistics. Combining this with Sotterley's customer base, and the new depot on the estate, brings the best from both organisations.

This consolidation of the industry has been happening for a while, and at Forest Fuels we have bought small businesses in the Lake District and Liverpool in the last year. Bringing together smaller operators – retaining the local depots and staff, but spreading the overheads of the increasingly complicated regulation – is a way that the industry can be profitable, and therefore sustainable.

The team at Forest Fuels and, top, Peter Solley in front of the company's new blower lorry

Investment

Long-term sustainability – and with it long-term markets for timber, reliable fuel supply for customers, and increasing employment – needs stable and secure businesses. Such stability requires significant financial investment – something lots of independent operators can't provide – so in March this year Forest Fuels entered the next stage of the wood fuel industry's evolution, when it was purchased by Aggregated Micro Power (AMP). AMP's purchase of Forest Fuels is part of the industry's consolidation, and I see it as a real "coming of age" for woodfuel. As far as I know, AMP is the first plc to enter the small-scale woodfuel industry.

This gives a clear indication that investors are confident in the future of the woodfuel industry for at least the next 20 years. It gives us resources to continue our growth, both organically and by acquisition or partnerships and link-ups.

Forest Fuels has a range of long-term relationships with woodland owners, sawmillers and operators of wood chip drying sites – working together for mutual benefit. Coming from a forestry background ourselves we value the long term relationships, and are looking to develop more of them as the business grows. For example, we have recently agreed to work with a farmer in the south west who is installing a wood chip drying facility: he will dry the wood chip, and we will distribute it to customers. We'll work closely together, each concentrating on what we do well and not treading on each other's toes.

www.forestfuels.co.uk

The tides of change

Peter de la Haye, Managing Director of de la Haye Engineering Ltd, reflects on his experiences in the biomass industry with Ruth Allerstorfer

Recent years have seen a vast increase in the popularity of biomass boilers, with a corresponding increase in both the number of installers and the range of products. But where did this spring from?

I first became involved with biomass heating 20 years ago through a local landowner/forester who imported woodchip boilers from Finland.

At that time, the technologies we know today were in their infancy and the number of businesses supplying woodchip boilers was small, with all UK suppliers known to one another. Those who installed woodchip heating mostly did so independently, without grants or incentives.

In 2003 the Clear Skies grant scheme was introduced for small-scale renewables, coupled with an accreditation scheme for installers and products. This gave an initial boost to the industry, and I started selling and commissioning biomass systems. Even then the number of registered installers remained small; in 2005 there were only five companies accredited in Scotland.

However, as with most government schemes, Clear Skies was short lived. Funds ran out relatively quickly each year, with uncertainties over future funding. Most installers found this a nightmare because customers were delaying orders for up to four months so they could benefit from next year's grants.

Funding for Clear Skies dried up in 2009 when the Renewable Heat Incentive (RHI) was first announced, although the latter was not introduced until November 2011. Despite its short lived and stop-start history, Clear Skies created an awareness of wood heating which, alongside rising oil prices, helped the industry to grow.

As Clear Skies wound down, MCS accreditation was introduced, with separate schemes for boilers and installers. This was initially unpopular with existing suppliers and installers, introducing considerable bureaucracy and expense. Despite being EU members, the UK did not consider European test standards for wood boilers as sufficient for the MCS scheme, demanding onerous additional prerequisites for product accreditation.

That said, the MCS accreditation of installers introduced consumer protection and forced installers to follow proper procedures, which has benefited both parties in the long run.

The RHI gave a huge boost to the biomass industry – there are now 399 accredited installers in Scotland. However, businesses need a degree of continuity and stability which the RHI did not provide. The scheme had barely started when payments were reduced by quarterly 'degression' (a government invention which appears to combine 'digressing' from the scheme's intentions and 'depressing' the industry).

Over the last six months (following two years of relentless degressions), many companies have experienced a sudden decline in interest, suggesting either that customers no longer think RHI payments are worthwhile, or that they fear the scheme ending before their installation is completed. This rapid decline has left many suppliers floundering, and created severe competition.

However, the reality is that the RHI is currently still worth far more than any previous grant schemes. As quarterly degressions are announced thirty days in advance, tariffs are guaranteed for four months – long enough for domestic installations and most small non-domestic schemes.

Looking ahead, it seems that the industry will return to more realistic levels, away from the artificial boost of the RHI, as people observe that biomass heating is worth installing even without grants or incentives. The first page of one log boiler manual states: "It is important that the user has the right attitude to their boiler". This is true. Biomass heating does require a positive attitude, but like many things that require commitment, it is hugely rewarding.

Solo-Innova

From May 2016 the Solo-Innova MK2 log boiler has been available to buy here in the UK from de la Haye Engineering. It is manufactured in Denmark by HS Tarm, the owners of Baxi Denmark, and like its predecessor, this boiler is set to raise the bar across the industry by redefining what a log boiler can be, *writes Ruth Allerstorfer.*

The original Baxi Solo-Innova was one of the most popular gasifying log boilers in the UK in its day, with hundreds of units installed across the country (many of which are still giving sterling service). For the last four years however, not much has been heard about it, and other manufacturers have rapidly spilled into the vacuum its absence left behind. This could be about to change.

The Solo-Innova MK2 is a cutting edge boiler, available as a 30 and 50kw model. It has several distinguishing features, including a separate ignition door, a large log chamber, and 100mm of insulation. On testing, it was awarded EN303-5 Class 5 certification – the highest European standard for boiler emissions and efficiency. The standard 30kw model is available for under £4500 (ex-VAT).

www.woodfuelboilers.co.uk

Grown in Britain

Safe and warm with woodfuel

Woodfuel assured as homegrown is becoming an increasingly important part of our defence against an array of pests and diseases that threaten our trees, woods and forests.

One of the most threatening pests on our doorstep, is the Emerald Ash Borer that is causing extensive damage to the woods of North America and has been recently recorded west of Moscow, and for a beast that can fly strongly, that feels very close indeed!

Studies for the US have shown that this ‘wee beasty’ has been moved around in consignments of woodfuel logs and so we must learn these lessons quickly in order to stay EAB free.

At the forefront of this defence, are companies like Certainly Wood, the Woodfuel Barn and Notts Logs who have successfully achieved the Grown in Britain woodfuel licence and can therefore sell logs branded and assured as 100 % UK sourced.

We have the resources in the UK to potentially provide all the wood fuel logs we need, as more than 40 % of our woods are under managed and stocks are increasing every day. Indeed the whole of the current annual UK woodfuel harvest is replaced in only 40 days!

We know that active woodland management and even things like deer control are vital for maintaining carbon and fuel stocks. Plantlife and others recognise that the woodfuel market represents the single most important economic activity to reinvigorate our woodland wildlife.

Vital statistics: How much wood is used as fuel?

1.5m green tonnes softwood roundwood
0.4m green tonnes of hardwood
Around 17% of total harvest goes to energy
Annual increment in UK woods is around 20m tonnes (and woodland cover increasing)
40 days growth to replace annual woodfuel harvest
Even broadleaved woodland produces equivalent of 1000l of oil per ha per year
FC stats do not capture arboricultural arisings and other activity below felling licence threshold
Source FC

The Grown in Britain brand identifies wood that has been grown in Britain and assured through a licensing scheme. It is a proud mark that shows where that timber has come from and provides assurance that it doesn’t just come from Britain but that the forests and woods are managed to the government’s UK Forestry and public procurement standards.
enquires@growninbritain.org
www.growninbritain.org

Reducing emissions

The UK is committed to reducing emissions by at least 80 % in 2050 from 1990 levels and the Renewable Heat Incentive and associated feed in tariffs all emirate from this objective. Bioenergy makes up about 44 % of our renewables and biomass about 8 % of the UK’s electricity.

So Grown in Britain is a very positive part of the biosecurity bigger picture, helping more woods back into management, increasing local jobs and helping the government and its agencies to reduce the risk of importing some pretty nasty pests (such as the Emerald Ash Borer *above*) and diseases by increasing homegrown alternatives.

Diary date: The National Woodfuel Conference is part of Grown in Britain Week and this year it will be on 13 October at Epsom Racecourse.

Contact: carol@surreyhillsenterprises.co.uk

CALL FOR VOLUNTEERS AT APF

Confor's Fiona Angier writes: What better place to introduce children to our industry, with you, the professionals, showing them what happens in a modern working forest and bringing it all to life. Those who have volunteered in the past can, I am sure, vouch for the enjoyable time they had, as well as answering those tricky questions!

There are several hundred children coming from a number of local primary schools due to attend the show over the Thursday and Friday. Each group will be accompanied by a teacher/adult who is entirely responsible for the children. We are looking for volunteers to accompany each group to explain and interpret what the group is seeing at each stop.

From experience the tours take 2-3 hours to complete and generally leave between 9.30 and 10.30. More information on briefing times, suggested routes, an introductory talk to each group/school on forestry and what to expect on the tour, as well as some health and safety issues to bear in mind, will all be dealt with in the run up to the date.

I hope that many of you are able to come to the APF 2016 at Ragley, and I would be delighted if you can spare some time to inspire the next generation in forestry and all its aspects.

If you know of anyone else who is going to the Exhibition please pass this on to them as a prospective volunteer.

Thank you for taking the time to add to the vital education of the next generation.

If you are interested in volunteering to take a group around the show please let me know by phone 0131 240 1419 (please leave a message) or email fiona.angier@confor.org.uk.


An aerial view of the 2014 Exhibition

APF 2016 hosts 'huge range of new exhibitors'

Exhibition secretary **Ian Millward** looks forward to the UK's leading forestry event

More than 260 exhibitors have already booked sites for Confor's APF 2016 Exhibition on 15-17 September at Ragley Estate, Alcester, Warwickshire, and more space has had to be found for static stands as the original static display area has already sold out.

Exhibitors from over 12 countries as far afield as America and Japan have booked with many exhibiting at the show for the first time. Many machines will be seen for the first time in the UK, including Ohashi and Albach. A full list of current exhibitors can be found on the visitor section of the website.

The levels of bookings to date has been fantastic, well ahead of APF 2014. We have 260 confirmed bookings so far, which is only 10 fewer than the total for APF 2014 with still four months to go. The static display area has never sold out so early before. We have had to create extra static space on the demonstration circuit to cope with the demand and demonstration sites are becoming very limited. There is a real possibility we will sell out of stand space before September and I urge any exhibitors still considering attending to book soon before it is too late.

Machinery for both large and small scale woodlands will be strongly represented and over 300 tonnes of timber will be harvested over the three days of the show.

Plant health continues to be ever more important and the Forestry Commission will be promoting its 'Keep It Clean' campaign and holding a series of topical seminars to bring you up to date with current research and news on the latest pests and diseases.

For the first time we will have a Forest Worker Zone. Organised by The National Coppice Federation and specifically aimed at the forest worker, there will be a range of daily practical drop-in discussions and demonstrations on a variety of subjects from ergonomic and efficient felling techniques, managing back pain, the new forest apprenticeship scheme to payment through the head. The draft programme for this can be found on the events page of the website.

What's new

There are new features even when you want to relax and enjoy a well-earned pint or lunch with old friends and colleagues. Both the main catering areas will have large covered seating areas in case the weather turns inclement and both will have free wi-fi available.

The Husqvarna World 25m pole climbing and the A W Jenkinson and Tilhill Forestry European Chainsaw carving competitions are both taking place again with the standard set to be higher than ever before. There will also be the Komatsu UK Forwarder Driving Competition and the popular woodland crafts area with a huge range of rarely seen crafts on display.

This really is the forestry and woodland event of the year and should not be missed. Even better **Confor members get in free!** Corporate and trade members need to apply to Confor HQ for their tickets allocation. Individual members simply need to turn up on the gate and show their current membership card to qualify for free entry. But please do bring your membership card. We do not have the facility to check your membership and without your card you will be charged the full gate price of £20 and we cannot offer subsequent refunds.

If you need to buy additional tickets or book camping you can do this online via our website and receive a discount on the gate price.

Full details of the exhibition, maps, booking forms and a list of exhibitors booked to date are on the exhibitor section of the website. **www.apfexhibition.co.uk**

Stuart Goodall, Confor Chief Executive, adds:
The APF is always a highlight of the year for the Confor team and we are really looking forward to welcoming members to this year's show. Do pop in to our tent for tea/coffee, and do please bring along any non-members who we can sign up! Please remember to bring your membership card, especially if you're coming for more than one day – otherwise you will have to pay at the gate. Contact Liz if you need a replacement card on 0131 240 1410.

We hope to see you there!

Fighting the grey: Accord is in for the long game

Adrian Vass, Project Manager of the UK Squirrel Accord, on its first year

The UK Squirrel Accord, formally launched in January 2015 with the support of 32 forestry, conservation, landowner and government organisation from across the UK, is starting to play an important role in facilitating the dissemination knowledge and information to the many local, regional and national organisations who are actively involved in both red squirrel conservation and grey squirrel control. The Squirrel Accord is well placed to speak to the government with authority about the priorities its members have identified where government can make a difference. Indeed Defra and its equivalents in Scotland, Wales and Northern Ireland are signatories to the Accord. Lord Kinnoull, Chairman of the Accord has met with Defra ministers and spoken in the House of Lords on the importance of effective measures to protect broadleaved trees from grey squirrel damage. In reply Lord Gardiner, Defra minister responsible for Non Native Invasive Species said: “There is no doubt that the grey squirrel is the greatest destroyer of trees. The arrival of this species has been a great disaster for our treescape, and we need to do something about it.”

Accord priorities include the urgent need to support the introduction of alternative methods of squirrel control, the need to support scientific research into both the squirrel pox virus and immunecontraception, facilitation of landowner cooperation to control squirrels at a landscape scale and communications and engagement of the wider public to recognise that this is a problem that must be addressed. Progress is being made on all these fronts, albeit slowly, but it is recognised that this is a long game.

My post as the Squirrel Accord’s full time project manager is currently generously funded by Natural England, a website and a regular newsletter which reports on the latest news and events in the world of squirrels. There is a thriving UK Squirrel Accord Group discussion forum with 400 members who are included in the latest issues and developments. Confor members are welcomed to register themselves on the group and should email info@squirrelaccord.uk for registration.

The loss of Warfarin as a control for grey squirrels.

Warfarin bait is no longer a legal method to control grey squirrels. From September last year landowners and managers are supposed to have disposed of any remaining stocks of warfarin. The cost of relicensing a product which has a relatively small market proved too prohibitive for the manufacturers, and Defra is unwilling to intervene. So, putting aside pine martens, this leaves trapping and shooting as the only currently available methods to control grey squirrels. This is far from satisfactory for woodland owners trying to prevent damage to their young trees.

Trapping

Traps are an effective method of squirrel control provided they are used wisely – in the right place, at the right time with an irresistible bait. Guidance on getting the best results from traps is one of a range of topics that are comprehensively covered in The Grey Squirrel Management Handbook published by the European Squirrel Initiative (ESI) and written by Charles Dutton of ESI

The problem with traps is that they must be inspected at least every 24 hours. This can be a hugely time consuming, and for some, expensive process.

There has been much excitement and anticipation about the introduction of the Goodnature trap (www.goodnature.co.nz/). This trap has been developed by entrepreneurs in New Zealand to control possums, rats and stoats. It is a lethal trap with a bolt action activated by a gas canister, similar in size to those used to inflate bike tyres. The animals are attracted by a species specific, nontoxic attractant and trigger a captive bolt as they approach, it then automatically resets after each strike. The dead animal drops to the ground, and the process repeats about 24 times before the gas canister needs to be replaced. The squirrel trap is a few steps away from being commercially available in the UK. The design needs to be adapted for grey squirrels, the resulting prototype tested in field trials to ensure it is reliable and humane with no unintended consequences, and added to the Spring Trap Approval Order before commercial distribution and sales can be established. This will take time but Goodnature expect the trap should available by July 2017. When it does it will no doubt be very popular.

Remoti (www.remotisystems.com/) is a battery operated device that attaches to the side of a spring trap and uses the mobile network to communicate with the operator’s laptop or smart phone to indicate whether the trap has been activated. It uses mobile technology to pick up the strongest network available and claims to work in remote areas even where some mobile phones have no signal. The benefit of this device is that it saves time and money checking traps every 24 hours. The intention

Continued on p37

Continued from p35

being that only those traps which have been sprung need to be visited. Following advice from Defra, the company is currently establishing scientific trials with landowners across the country in order to prove the effectiveness and reliability of the system. Crucially, in order to comply with the 2006 Animal Welfare Act, the company is intending to provide a body of evidence to demonstrate that by using the system animal welfare is protected and potentially improved.

These are two examples of emerging technologies. The UK Squirrel Accord is looking at other developments in traps but it is too early to give much detail.

Shooting

Shooting is widely accepted as an effective method of grey squirrel control especially when combined with trapping.

The National Forest has been identified as an area which is vulnerable to grey squirrel damage due to the young and uniform age of a relatively high proportion of the tree stock. BASC which has 144,000 members, has been working with the National Forest Company to pilot a project to test the effectiveness of bait stations operated by BASC volunteer groups as a landscape scale approach to grey squirrel control. Under this scheme, BASC recruit volunteers to set up bait stations in agreement with the landowner. The volunteers must attend a BASC run one day training event, undergo an accuracy assessment and receive a certificate. They must own an appropriate rifle with silencer, carry BASC indemnity insurance, notify the landowner of when and where they are shooting and record the cull. A signed agreement between the BASC member and the landowner is part of the process.

Under this scheme the landowner is assured that the bait stations will be operated responsibly and safely and will be able to track the outcomes. Other than supplying the bait, the scheme is free for the landowner and therefore potentially a very attractive alternative to trapping. BASC has set up a number of schemes across the country in collaboration with Confor, ESI and others and has agreed to establish bait station control groups in the RFS woods at Battram and Hockeridge. At Battram, the RFS has enrolled neighbouring woodland owners who have expressed an interest to participate in the scheme. The scheme will be most effective when conducted at a landscape scale.

Fertility control

As lethal control of squirrels is often opposed by the public, fertility control, based on immunocontraception, could be used to reduce the impact of grey squirrels on broadleaved trees. Immunocontraceptives are vaccines that induce antibodies to proteins or hormones essential for reproduction. Work carried out by the Animal and Plant Health Agency (APHA) and funded by Defra has demonstrated the effectiveness of singledose injectable immuno contraceptives. Modelling suggests that grey squirrels could be eradicated from an area in a few years if >70 % were rendered infertile. The use of injectable contraceptives is constrained by the need to capture animals. Therefore, developing oral contraceptives, and methods to deliver them, is now key to applications on a large scale.

APHA has developed a novel compound with potential as an oral immunocontraceptive, which now requires a formulation that elicits a better, longlasting immune response.

A UK company has created a novel, patented technology that is available for such a formulation. This is based on the shells of spores and pollen grains, used to micro encapsulate a wide spectrum of drugs. Pollen or sporebased encapsulation of drugs, including model oral vaccines, results in increased bioavailability and controlled release of these drugs. This technology has potential for the delivery of oral immunocontraceptives.

The vaccine is not species specific but the delivery mechanism clearly must be, to avoid it being taken by non target species, work is being done with a new trap which will be able to deliver the compound to a mature breeding male and female grey squirrel. The next phase of the project will be a proof of concept study in Britain. This will require two years of trials in a controlled environment followed by a further two years in the wild.

Grants

When Forestry Commission England published its updated and widely welcomed squirrel policy in 2015 some people were under the impression that Countryside Stewardship scheme would include grants for the control of grey squirrels. Grants are available but accessing them is not straightforward. If a Forestry Commission approved UK Forest Standard compliant management plan identifies a risk of squirrel damage, and if the woodland qualifies as eligible for a woodland improvement grant under Higher Tier, there is a grant of £100/ha for five years to cover a range of specified maintenance and management activities including grey squirrel control, which is deemed obligatory. This represents a step forward from the previous policy when there was no link between woodland improvement grant funding and squirrel control, but as the new grants are competitive, most broadleaved woods are likely to fall outside the Countryside Stewardship priority selection criteria.

When Forestry Commission England published the Government's updated and widely welcomed squirrel policy in December 2014, the accompanying action plan stated 'We will introduce a specific grey squirrel management prescription within the multiannual agreement for woodland management in Countryside Stewardship in addition to the funding available for grey squirrel control to support red squirrel populations'. Grants are available but accessing them is not straightforward. If a Forestry Commission approved UK Forest Standard compliant management plan identifies a risk of squirrel damage, and if the woodland qualifies as eligible for a woodland improvement grant under Higher Tier, there is a grant of £100/ha for five years to cover a range of specified maintenance and management activities including grey squirrel control, which is deemed obligatory. This represents a step forward from the previous policy when there was no link between woodland improvement grant funding and squirrel control, but as the new grants are competitive, the real challenge is how to make Stewardship have a landscape scale impact as neighbours are not guaranteed entry to the scheme.

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BRIEFING

P. ramorum on sweet chestnut

Forestry Commission are continuing to investigate cases of Ramorum disease in sweet chestnut trees (Castanea sativa) in South-West England, mostly in Devon and Cornwall. Unlike previous cases of the disease in sweet chestnut, these trees are not standing close to infected plants of other species such as rhododendron or larch.

Please therefore keep an eye out for signs of ill health in sweet chestnut trees now that they are in leaf again, and report suspected cases to FC using **www.forestry.gov.uk/treealert**

The symptoms are crown deterioration, foliage dieback, wilting and discoloured leaves, premature leaf fall (i.e. before autumn), and characteristic bushy, epicormic growth at the bases of affected trees. FC are working with Forest Research to understand the disease and its impact on sweet chestnut so that they can provide the best possible advice for growers and owners, and devise appropriate control measures. The numbers of trees affected are relatively small. FC has published a guide to symptoms and will add to this information as knowledge of the condition develops. **www.forestry.gov.uk/pramorum**

Oak Processionary Moth

The annual programme is under way to control the population, spread and impacts of oak processionary moth (OPM) larvae in London, Surrey and Berkshire. Tree, landscape and ground-care professionals and others working near oak trees are therefore strongly advised to wear personal protective equipment and to familiarise themselves with the regulations applying to movements of oak material in the affected areas. You are also ideally placed to supplement the formal surveying by reporting any OPM you see with Tree Alert. Guidance on all aspects of OPM identification and management is available at **www.forestry.gov.uk/opm**

Pests in a changing climate

A new Research Note, *Exploring future trends in pest damage to forests in a changing climate,* written by Forest Research entomologists, explores future trends in the effects of insect pests on Britain's forests as the climate changes. The Research Note can be found at **www.forestry.gov.uk/PDF/FCRN021.pdf/**

Contingency planning

Confor has recently responded to the draft Contingency Plans for the Emerald Ash Borer (*Agrilus planipennis*) and Sweet chestnut blight (*Cryphonectria parasitica*). Final Contingency Plans can be found at **www.forestry.gov.uk/pestsanddiseases** for specific pests and diseases.

Chestnut blight

Chestnut blight is a serious disease of chestnut trees caused by the fungus *Cryphonectria parasitica*. The fungus does little damage to host trees in its native range in Asia, but has devastated American chestnut when it was accidentally introduced to the USA more than 100 years ago via infected planting stock. The disease was introduced into Europe in the 1930s where it affects species such as the European or 'sweet' chestnut. It has since spread to most parts of the continent, causing serious damage in orchards and forests. Chestnut blight was detected for the first time in Britain in 2011 on planted imported trees, but is now considered eradicated. However, annual surveys and vigilence are needed to ensure that the UK remains free of the disease.

A Pest Alert can be found at **www.forestry.gov.uk/PDF/FCPH-CB.pdf/$FILE/FCPH-CB.pdf**

Sweet chestnut tree showing symptoms of infection by *Cryphonectria parasitica* fungus
© Crown Copyright
Forestry Commission / Barnaby Wylder

Italy extends *Xylella* zone

Xylella fastidiosa is a disease causing bacterium that affects a wide range of important woody plants and broadleaved trees. It invades the xylem vessels that transport water throughout plants and causes symptoms that range from leaf scorch to tree dieback and death. In the natural environment it is transmitted by xylem-fluid feeding insects such as leafhoppers. An outbreak on olive trees in southern Italy was confirmed in 2013. Affected shrubs were also found in France in 2015.

The infected zone in Italy has been extended. Beyond this area, Italy has designated the rest of its territory as a Pest Free Area and a 10km buffer zone will extend into this Area with associated movement controls, as an extra precaution, which is in line with the buffer zone requirements for all outbreak sites.

The list of plant species ('specified plants') subject to import restrictions and requirements regarding movements from demarcated areas within the EU has been updated. The list includes further species confirmed to be hosts in the EU and in response to developments elsewhere in the world. This will ensure that the import and movement requirements reflect the most up to date position.

The need for good practice and vigilance by UK nurseries and traders if purchasing plants from areas where *Xylella* is present has been reinforced. Those species known to be hosts of *Xylella* in the EU (see **http://ec.europa.eu/food/plant/plant_health_biosecurity/legislation/emergency_measures/xylella-fastidiosa/susceptible_en.htm**) must be accompanied by a Plant Passport.

See Pest Alert at **www.forestry.gov.uk/pdf/FCPH-XF.pdf**

Gall Wasp surveillance

Forestry Commission will be surveying sweet chestnut trees again this summer for any further signs of Oriental Chestnut Gall Wasp (OCGW) in the wake of last year's discovery of outbreaks in Farningham Woods, near Sevenoaks in Kent, and in St Albans in Hertfordshire.

As well as surveying in and around the outbreak areas, a sample survey of chestnut trees in high-risk areas will be carried out across South-East England and East Anglia. They ask anyone who owns or lives, works or recreates near sweet chestnut trees to keep an eye out for the tell-tale galls, or growths, which indicate the pest's presence, and report sightings to us without delay with Tree Alert. Identification guidance is available at **www.forestry.gov.uk/gallwasp**

New breakthrough on ash dieback

UK scientists have identified the country's first ash tree that shows tolerance to ash dieback, raising the possibility of using selective breeding to develop strains of trees that are tolerant to the disease. The findings, which could help ensure ash trees will thrive in UK woodlands, have been published in a report co-funded by Defra and the Biotechnology and Biological Sciences Research Council (BBSRC).

Ash dieback is spreading throughout the UK and, in one woodland in Norfolk, a great number of trees are infected. However, there are exceptions which demonstrate very low levels of infection by the ash dieback fungus and here researchers have identified one tree, nicknamed 'Betty', as having a strong tolerance to the disease.

The breakthrough comes after researchers from the government-backed Nornex project, led by the John Innes Centre in Norfolk, published the world-leading research report into ash dieback disease.

The team compared the genetics of trees with different levels of tolerance to ash dieback disease. From there, they developed three genetic markers which enabled them to predict whether or not a tree is likely to be tolerant to the disease – even whether it is likely to be 'mildly' or 'strongly' tolerant. Betty, they discovered, was predicted to show strong tolerance.

Register lists 12 high risk pests

There are 12 high priority forest pests in the UK Plant Health Risk Register (UKPHRR), that require actions – in addition to mitigations already implemented – to prevent them having a, potentially substantial, negative impact on England's woodland.

Over the one year period to the end of March 2016 the total number of forest pests in the UKPHRR has increased from 219 to 268. Eighteen of these new pests were due to the addition of EU quarantine pests, European and Mediterranean Plant Protection Organisation (EPPO) pests recommended for regulation and EPPO Alert List pests, fifteen were identified by horizon scanning, six were added following recent outbreaks in the EU and ten were included because findings (without outbreaks) had been made in the EU or the UK.

Ten are broad-leaved tree pests, one is a pest of conifers and one affects both. Seven of the 12 pests are present in the UK, the other five are currently absent.

The 12 high priority forest pests in the UKPHRR with a relative risk rating (mitigated) of 15 or more at end March 2016

Common name	Latin name	Type of pest	Present in the UK?	Mitigated Likelihood score	Mitigated Impact rating	Mitigated Likelihood multiplied by Impact risk rating
Alder Rust	*Melampsoridium hiratsukanum*	Fungus	Present:	5	4	20
Bleeding canker of horse chestnut	*Pseudomonas syringae pv. Aesculi*	Bacterium	Present: widespread	5	4	20
Sudden oak death; ramorum dieback	*Phytophthora ramorum*	Oomycete: an algaelike fungus	Present: limited	4	4	16
Chalara ash dieback	*Hymenoscyphus fraxineus*	Fungus	Present: limited	4	4	16
Red-necked longhorn beetle	*Aromia bungii*	Insect	Absent	4	4	16
Phytophthora Disease of Alder	*Phytophthora alni*	Oomycete	Present: widespread	4	4	16
Emerald ash borer	*Agrilus planipennis*	Insect	Absent	3	5	15
Acute oak decline	-	Decline disease	Present: limited	3	5	15
Two Spotted Oak Buprestid	*Agrilus biguttatus*	Insect	Present: limited	3	5	15
Oriental chestnut gall wasp	*Dryocosmus kuriphilus*	Insect	Present: under eradication	3	5	15
Butternut canker	*Ophiognomonia clavigignenti-juglandacearum*	Fungus	Absent	3	5	15
Sakhalin fir bark beetle	*Polygraphus proximus*	Insect	Absent	3	5	15

Forest Research call to nurseries

Forest Research is inviting nursery managers and other plant traders to take part in scientific research into Phytophthora infections in the trade.

The project complements the 'Keep it Clean' campaign to promote good biosecurity practice at work to minimise the spread of plant pests and diseases.

Dr Sarah Green senior forest pathologist at Forest Research explained, "As people in the trade are well aware, our plant trade and natural environments are being affected by a range of destructive *Phytophthora* organisms which have entered Britain from different parts of the world. They arrive and are spread around the country in soil, water, equipment and in the tissues of a large number of plant species, damaging business and ecosystems alike.

"We are looking for plant nurseries and traders to take part in this project to enable us to better understand the dynamics of *Phytophthora* spread and infection, and devise effective control measures. They can do this by sharing their expertise and experiences with us, and allowing us to sample water and plants at regular intervals during the project" said Dr Green.

She added: "In return, we will provide them with information about their *Phytophthora* risk, and work with them to reduce it. Ultimately the project will provide invaluable data which will help businesses to effectively manage their risk."

All published data on nursery findings will be anonymous, and it will not be possible to identify any individual businesses from the published findings. Anyone interested in an informal discussion about ways to get involved may email sarah.green@forestry.gsi.gov.uk

www.forestry.gov.uk/fr/phytothreats

Observatree's free pest and disease guides

Citizen science initiative Observatree has made its downloadable resources and videos available from its website to help you identify priority pests and diseases and spot early outbreaks. They include a pest and disease calendar so you can check at a glance for seasonal issues you should be aware of.

Please report any indication of ill health in trees at **www.forestry.gov.uk/treealert**

www.observatree.org.uk

Risk assessments

The UK Plant Health Service publishes risk assessments for organisms which could potentially pose a risk to the natural environment, forestry/woodland and ornamental sectors. Further information can be found at **//secure.fera.defra.gov.uk/phiw/riskRegister/plant-health/pest-risk-analysis-consultations.cfm**

PESTICIDES NOTEBOOK **Colin Palmer**

Glyphosate... again

It seems that hardly a week goes by without the media reporting on yet another reaction to the inclusion of glyphosate on the WHO "probable carcinogen" list.

So is glyphosate safe to use?

Well, nothing can be described as "safe", even water, but the European Food Standards Agency has just published an in depth study of glyphosate and concludes that "it is unlikely that glyphosate is carcinogenic". This is the view of all worldwide regulatory agencies, many of which have criticised the WHO for using poor scientific data in their recent analysis.

In April we learned that MEPs were to vote on the re-registration of glyphosate in Europe, so Confor lobbied UK MEPs to stress the importance of the product. We had a good response, with the majority cross party replies indicating support of re-registration, often accompanied by well briefed explanations.

The vote to propose non-registration, organised by the Green Alliance, was taken on 13 April and was not sufficiently supported. MEPs did resolve, however, that the registration should be reduced from 15 yeas to seven years, and that amateur and amenity use should be excluded.

It should be noted that this vote is purely advisory, as the actual decision will have been made on 18/19 May by the Standing Committee on Plants, Animals, Food & Feed, (SCoPAFF), Phytopharmaceuticals Committee, made up of experts from each Member State.

The Commission is desperate for a definite decision to be made and not delayed, so it is thought that the regulation proposed will be some form of compromise – my sources suggest a 10 year registration and the exclusion of tallow amine based formulations. The latter would include popular products such as Clinic Ace and Glyphos, but not the popular Monsanto products such as Roundup Pro-Active.

Whatever happens, we will be able to use current products until the current registrations run out on in June 2018.

I'll report on the result in the next FTN.

Bramble, gorse and scrub - Broadshot

Since the loss of Timbrel and Garlon, the only specific scrub killer available in the UK was Broadshot.

Old label Broadshot may continue to be used in non FSC forests, but the new label is approved for grassland only, with no forestry approval. But even had forest approval been granted, it would have been of little value as the rate for knapsacks has been reduced from 20ml/l to 3ml/l – far too low to be effective on any perennial weed.

Consideration had been given to applying for an offlabel approval for a related herbicide containing fluroxypyr, but this is also now not feasable as a knapsack use is either prohibited, or also restricted to an ineffective 3ml/l.

Glyphosate is, of course, very effective on most scrub species (but not gorse) if aided by an effective adjuvant such as Validate. For best results use a high rate of glyphosate (most labels allow up to 9-10l/ha on difficult weeds such as rhododendron), and use a nozzle providing a medium spray such as a DT1.0 (yellow) jet.

MEMBER SERVICES **PESTICIDES HELPLINE**

If you haven't used the service to date, be assured it is a free service operated by Confor's crop protection adviser Colin Palmer on behalf of Confor members. Colin can be contacted 8am to 8pm Mondays to Fridays on 01531 633500 (leave a message if necessary) or by email to: forestry@branchline.demon.co.uk

OBITUARY

Sir David W N Landale KCVO, DL

David Landale died in March this year, just short of his 82nd birthday. He was widely known for his early career in the east with Jardine Matheson following father and grandfather 'taipans' of that great Scots-Chinese trading house, and for his stewardship of the isle of Gigha which led to his being appointed to look after the Duchy of Cornwall estates for which he was made KCVO, and for his founding of the Maggie's Centres in 1995 which now has 20 centres throughout Britain dedicated to caring for cancer sufferers.

But readers of FTN will equally recognise him as one of the leading lights of the forestry sector in the UK, especially Scotland, where he lived on the family estate at Dalswinton. He was chairman of Timber Growers UK Ltd (1985-87) but with a love of his own woodlands, and a deep interest in the success of the sector, he was involved with almost every important development of the industry for several decades.

David played a key supportive and creative role during the process of the merger of Timber Growers Organisation (TGO) and Scottish Woodland Owners Association (SWOA), and the subsequent disposal of SWOA's commercial arm SWOAC Ltd to a management buyout, creating the Scottish Woodlands Ltd of today. And he used his considerable diplomacy to use the Association's surplus funds to establish The Scottish Forestry Trust, which has helped shape forest and processing research and policy in a whole range of areas, both in Scotland and throughout the UK.

David's Chairmanship of the Trust during the 1990s played an essential and influential part in establishing the Trust's pre-eminent position, and it was David's advocacy and creativity that enabled the Trust to contribute the essential funding to establish and develop Cashel Forest on the slopes above Loch Lomond as a major forest education and research centre.

Despite his stature and all his considerable achievements, David Landale was someone you instinctively knew listened to your point of view and could prove to be the gentle and caring friend he was to so many.

SCOTLAND

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New Forestry Minister

We welcome the appointment of Fergus Ewing MSP *(below)* as Cabinet Secretary for Rural Economy and Connectivity whose portfolio includes forestry. This is a first in recent times for forestry to be a cabinet secretary's responsibility rather than that of a junior minister, and reflects the growing importance of our £1bn industry and its status in the rural economy - as opposed to sheltering under the 'environment' umbrella.

Typically though with change comes challenges, such as we will now have to deal with another minister in respect of the interface of forestry with the environment agencies SNH and SEPA - Cabinet Secretary for Environment, Climate Change and Land Reform, Roseanna Cunningham MSP.

We have already asked Fergus Ewing for an early meeting to discuss how we can help Scottish Government keep to their manifesto pledges on forestry, such as 10,000 hectares of new woodland creation each year.

Forestry Grant Scheme (FGS)

We have been pressing FCS and RPID for action on paying out 2015 Annual Recurrent Payments. Now that Scottish Government has openly admitted the problems with the new IT system and that it will be some time before said system can make ARPs, RPID has been working up an alternative manual payment method, and the last we heard they hope to have this operational by the end of May. I have repeatedly asked during the last 6 months for better and more open communication about these problems, which I am all too aware have caused members much frustration.

Forest roads – prior notification

We have already made contact with the new minister's team (Kevin Stewart, MSP, Minister for Local Government and Housing) for reaction to the independent review (carried out by Ironside Farrar) into the prior notification / prior approval procedure introduced last year. We presented enough evidence that the new process is wholly unnecessary for forest roads, and I continue to hope that common sense will prevail and forestry will be removed from this new legal obligation.

Strategic Timber Transport Scheme

The assessment panel met on 16 May to consider fifteen applications for funding during the year ending 31 March 2017. FCS will be contacting applicants as I write this. There is just over £2m available, and anyone with strategic schemes which they believe could be delivered by March next year should get in contact with Roland Stiven immediately.

Meetings and Conferences

March was a hectic month of activity culminating in three very successful regional meetings for the forestry & timber industry, and then The Scotsman Conference on 22 March, which was a sell-out and generated even more publicity. The purdah before the Scottish elections gave us time to breathe again and complete a round of Scottish Tree Health Advisory Group and sub-group meetings. The pace will pick up again as we prepare to brief the new forestry minister, though it is to be welcomed that Fergus Ewing MSP has much previous experience of our sector.

Confor website

I hope you will have had time to look at the revamped website, and remember to spread the word about the fabulous new videos and animations, all of which can be accessed from the home page at **www.confor.org.uk**

ENGLAND

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DEFRA visit to the North of England

Confor hosted DEFRA's Head of Forestry Policy, Stephen Penlington, on a visit to the North of England in April. The purpose of the visit was to show Stephen the significant barriers to new productive planting and the detrimental effect on supply chain businesses that lack of planting is having and will have. We were kindly hosted by Trees Please Nursery, AJ Scott's Sawmill, Pennine Biomass (proposed large scale planting at Doddington) and Northumberland Estates.

England National Manager takes time out to nurture new generation

There must be something in the water at Confor. This little miracle should be making an appearance in early July. I am planning to be away from June returning in the New Year. My England and regional administration and representation roles will be covered on a part-time basis by Jez Ralph.

All other activity will be addressed by Head Office. All e-mails will be read on a regular basis and forwarded to a relevant staff member to be dealt with. I am, nevertheless, planning to keep a watching brief during my maternity leave. Please continue to use caroline.harrison@confor.org.uk

Confor
Promoting forestry and wood

KEY EVENTS in 2016

14 June, Bristol – The Self-Build/Custom-Build House (part of Wood for Good's Spring 2016 conference programme)

28 June, London – The Solid Timber House (part of Wood for Good's Spring 2016 conference programme)

18-21 July – Royal Welsh Show, forestry day 19th

15-17 September – APF Show 2016, Ragley Estate

10-16 October – Grown in Britain Week

1 November – Making Woodlands Pay, major conference organised by Confor and the Royal Forestry Society

More details at **www.confor.org.uk/resources/events/**

NEW MEMBERS

Eco Prospects Ltd, Cheshire
Edinburgh Napier University, Midlothian
K Russell Consulting Ltd, Cambridgeshire
Sylvalytics Ltd, EIRE
Timber Design Initiatives Ltd, Midlothian
Woodland & Forestry Ltd, Staffordshire
Ivan Drake, Midlands
Robert Reed, London
Stephen Wombwell, Yorkshire
The Lord Napier & Ettrick, Suffolk

DEFRA review of Woodland Creation Grant and Planning Grant

Confor was contacted by DEFRA'S Implementation Unit, a team responsible for advising the Secretary of State and DEFRA Ministers on progress against the Department's top priorities. One such priority is the Government's commitment to plant 11 million trees by 2020. They are undertaking a review into the Countryside Stewardship Woodland Creation Grant. As part of this work, they would like to better understand what drives people to apply for a grant and what could be done to encourage more applicants. A geographical selection of members gave feedback on their experiences of the WCG and WCPG.

Countryside Productivity

The last round of Countryside Productivity supported 79 forestry projects. The total value of grants awarded exceeded £1million, matched by £2.7million of private investment. Most of the grant applications were for equipment to increase production of woodfuel. DEFRA plan to open another round of Countryside Productivity capital grants and training grants for forestry in the autumn. It is likely that this will closely follow the requirements of the previous round. They acknowledge that businesses would prefer an earlier launch and are looking at how this might be achieved.

Vision for the Urban Forest

A vision for the Urban Forest has been published by the Urban Forestry and Woodland Advisory Committee. See www.forestry.gov.uk/urbanforestry

Dates for the diary

South West
07 June: Wessex Committee meeting at Gasper Mill (10:30-13:00) (CH will attend)
08 June: Devon and Cornwall Committee at Great Fulford (10:30-13:00) (CH will attend)
04 October: Wessex Committee meeting at Gasper Mill (10:30-13:00)
05 October: Devon and Cornwall Committee at Great Fulford (10:30-13:00)
Oct (TBC): South West region members day - Combined Heat and Power - Taunton

West Midlands/Marches
23 June (TBC): West Midlands/Welsh borders region members day – water quality
Oct (TBC): West Midlands region members day and AGM (to include Committee meeting) - joint with RFS estate visit - Norbury

North
Oct (TBC): North region members day and AGM (to include Committee meeting) - woodland creation - Durham

East
04 August: East of England Committee meeting at Grimsthorpe Estate (13:00-16:00)
Sept (TBC): East of England members open day - estate visit - Belvoir Estate
Nov (TBC): East of England AGM and Woodland Communication Day - Horringer

WALES

Martin Bishop, Confor national manager for Wales
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martin.bishop@confor.org.uk

NRW board meeting

This was attended by Roger Cooper and myself recently where we had the opportunity to put questions to the board. We wanted to know can NRW publish more information on the costs and returns from their timber production programme and other land based operations and would they ring fence sufficient funds to replant all the areas felled on the Welsh Government woodland estate annually without delay.

They will discuss our questions and give us their response as soon as possible.

We are grateful for the opportunity to ask questions direct to the board.

The 2016 Royal Welsh Show Tree Felling Competition

This year saw a welcome increase in competitors with 10 new entrants taking part alongside 11 old hands at the competition. Everyone enjoyed the weekend and a particular feature of this competition is the way the experienced competitors go out of their way to help the new guys and really show them the tricks of the trade.

It would be great to see a few ladies entering as well!

The competition is organised by a small

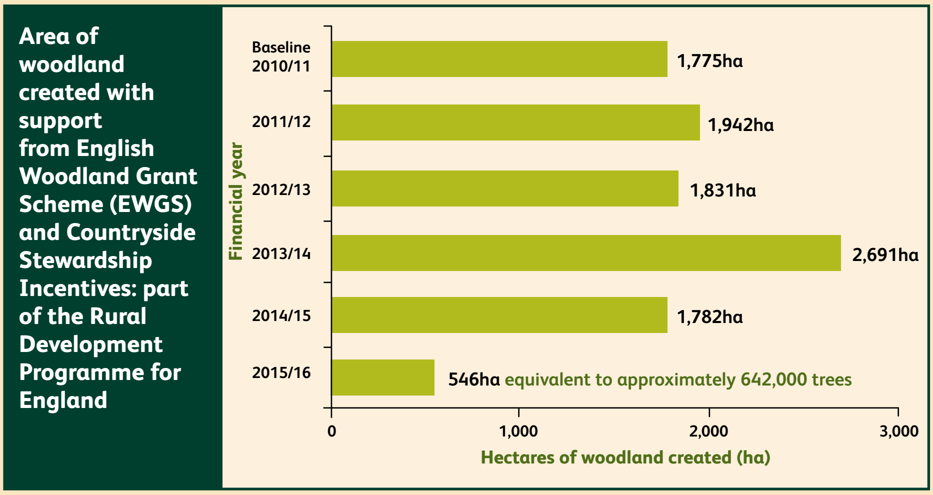
Continued on p45

FC Corporate Plan Performance

Forestry Commission England's Corporate Plan 2015-16 sets out the current key performance indicators to show their contribution towards forestry and woodlands in England. The year-end report on these headline indicators for the 2015-16 financial year has been published at **www.forestry.gov.uk/pdf/fce_headline_performance_indicators_31mar16.pdf**

Key figures

Priority forest pests: There are 12 high priority forest pests in the UK Plant Health Risk Register that require actions.
Woodland in active management: 58 % of English woodland is actively managed.
Woodland expansion: 1,304,000ha of woodland in England, an increase of 2,000ha on the previous year. This includes woodland created from all measured sources.
Woodland creation: 546ha planted with Countryside Stewardship support in 2015/16.
Cost of managing Public Forest Estate: £71.03 per hectare subject to audit and finalisation.



The woodland creation figure in this graphic is gross ha. It is assumed that at least 20 % of this area will be open ground further reducing the figure. By planting productive mixed woodland DEFRA will get more bang for their buck in ha and trees, and it's far easier to hit the pitiful planting target of 11m trees.

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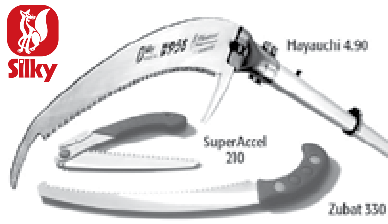

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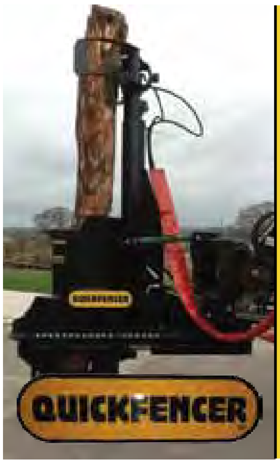

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Continued from p43

dedicated bunch of individuals who work hard to make sure it all runs smoothly, our thanks go to Richard Siddons for his work in organising the event and running it on the day.

Judges included Mr Alun R Jones, Mr Chris Hughes, Mr James Archer, Mr Jeff Jones and Mr Andrew Fletcher.

Stewards: Mr Brian Barker, Mr Tegwyn Hughes, Mr George Johnson, Mr Phil Dunford, Mr Roger Nock, Mr Ian Scheffer and Mr John Bevan.

This competition is generously sponsored by: Husqvarna, BSW Timber, MWMAC (Mid Wales & The Marches Assessment Centre), Smallwood Services Ltd. Forestry Contractors Association, Caerfagu Products Ltd. The Oregon Shop and Confor.

The competition was held on 14 and 15 May near Llandrindod Wells, by kind permission of Natural Resources Wales.

The competitors were asked to prove their skills at felling, snedding, cross-cutting and changing a bar and chain on their saw, competing in one of four categories:

- Class 1 Expert (previous competitors 25 years and over): 1- Mark Edwards; 2 - Ceri Hughes; 3 - Jo Willett
- Class 2 24 years and under: 1- Alun L Morgan
- Class 3 Newcomers: 1 - Ywain Howatson; 2 - Will Hampton; 3 - Liam Marshall
- Class 4 – Veteran Chainsaw open to anyone in class 1, 2, or 3 using a chainsaw 25 years of age or older

Institute of Welsh Affairs: Assembly Election Briefing

As 10pm on May 5 rolled around and the polls closed on the Assembly election for another five years, Welsh Labour was nervous. Against a background of projected heavy defeats for Labour in Scotland, and weeks of difficult coverage of the state of the UK Labour party, the Conservatives were predicting that gains would be in their favour at the expense of Labour. Plaid Cymru also had their eye on key Labour strongholds, and were hoping to slash Labour's number of seats.

But as the rest of the world woke up on Friday morning, Carwyn and team began to breathe a sigh of relief. Labour held all of their seats. The Tories on the other hand had a bad night, losing three seats and failing to secure any of their much talked up targets. Plaid Cymru, while celebrating Leanne Wood's Rhondda gain, must also have been disappointed at their failure to make any real traction. If anyone had a really good night, it was UKIP bringing seven new assembly members to Cardiff Bay. They replace the Liberal Democrats as the fourth largest party in the Assembly, who remain, but with only outgoing leader Kirsty Williams to represent them.

How the parties fared – number of seats

	2011	*2016*	*Change*
Labour	30	29	-1
Plaid Cymru	11	12	+1
Conservatives	14	11	-3
Liberal Democrats	5	1	-4
UKIP	0	7	+7

The Tories – When the election coverage began target seats in Wrexham, Cardiff North, the Vale of Glamorgan and even Clwyd South were apparently within the grasp of the Welsh Conservatives. But as the results began to roll in Welsh Labour's worst fears were not realised, and the Tories faced both defeat in those target seats and the loss of some of their Regional Assembly Members.

Relief for Labour – In the end Labour lost just one seat and go into the fifth assembly with 29 seats, two short of an overall majority. The party partially has the electoral system to thank for this with Welsh Labour as one of the few positive news stories for Labour nationally as they slipped to third place in Scotland and failed to make any gains of Councils across England.

Ahead of the election some were suggesting that a coalition would be inevitable. Now Labour are likely to go it alone, making deals as they are needed. The rise of UKIP actually does them a favour here, meaning a united opposition in the Senedd is unlikely.

A valley's victory for Plaid – The big story of the night, and the only constituency seat to change hands, was Rhondda. Plaid Cymru's Leanne Wood managed to convincingly win the seat from Labour heavy hitter and Government Minister for Public Services, Leighton Andrews. Plaid Cymru now become the official opposition party in the Assembly again, and while they'll be disappointed by their failure to gain target seats such as Llanelli and Aberconwy, Leanne's victory in Rhondda may make those who were suggesting it could be time for a new leader think again. Leanne Wood has shown that her national recognition and popularity can transfer to votes against one of Labour's most recognisable figures.

The lone Lib Dem – Kirsty Williams, the party's sole survivor in the Senedd, held her seat in Brecon and Radnorshire with a 9.3 % increase in her vote share. Kirsty's popularity alone was not enough despite the party maintaining relatively strong performances in both Cardiff Central and Ceredigion. The party lost four seats and will now have no group in the assembly. What Kirsty can do alone is an interesting question, Kirsty's one seat could be of great use to a Labour minority government.

UKIP – UKIP now enter the assembly with seven regional seats. While they failed to secure any constituency seats, the party will be buoyed that they continued the gains in votes shown at last year's general election.

The fifth Assembly – Labour has done remarkably well to hold on to 29 seats after 17 years in power, but its shrinking share of the vote should cause real concern in the party. The policy agenda facing this Assembly will be demanding given ongoing austerity, and the downward economic pressures. The fourth Assembly was marked by the failure of the opposition parties to work together and the arrival of seven UKIP AMs will not make cross-party cooperation any easier. However, the likely absence of formal pacts makes issue-based coalitions all the more important and the engagement of UKIP AMs will be critical if the Assembly is able to sustain itself as an institution of 60 members.

The intake of the fifth Assembly may be the strongest since the Assembly was established in 1999. There are now just nine Assembly Members left from that first intake and this term sees some big personalities join the ranks. A generation who have grown up with devolution have the opportunity to help the institution mature into a 'proper Parliament'.

Source: Institute of Welsh affairs. To have access to briefings and analysis like this, please join the Institute of Welsh Affairs. Jessica Blair, Policy and Projects Manager, T: 029 20484 387 E: jessica.blair@iwa.org.uk
Full report at **www.iwa.org.uk**

Election Updates

Martin Bishop writes

16 May 2016 – "A week is a long time in politics" someone famous once said, very true.

Labour holding 29 seats and not having an overall majority has resulted in a very interesting start to the fifth assembly.

One of the first jobs of any assembly is to elect a first minister which this time around has proved a real stumbling block. Labour and Plaid Cymru both put forward their leaders for selection, the result was a tie.

It was widely thought that there would be no unified opposition to Labour which would make a minority government possible, obviously we have to think again. A coalition government was preducted based on individual issues, hoping for an amicable consensus. If the start is anything to go by this administration is going to be nothing like that.

It is rather ironic that throughout the last assembly, and particularly in regard to the Environmental bill/act, Welsh Government continually preached the merits of consultation and co-operation. We are told we have to debate with all stakeholders and reach a unified conclusion. The lesson here must be that harmonious liaisons are not always a given and maybe, just maybe, sometimes they remain just out of reach.

20 May 2016 – The First Minister of Wales Carwyn Jones has announced his new Cabinet and Ministers. Lesley Griffiths is the new Cabinet Secretary for Environment and Rural Affairs. I await confirmation that the forestry sector will be within this portfolio.

WOODLAND OWNER

by **Professor Julian Evans OBE FICFor**

High summer

The seasons offer a never ending joy of changing scene and sights in a woodland. But this year I am experiencing disappointment: only once have I heard a cuckoo and around our home in rural Hampshire no swallows or house martins have turned up. I haven't checked for other summer visitors but these harbingers of change are disturbing.

My wife and I are all the more disappointed because we've rebuilt our garage, in part with home grown Douglas fir, with deliberate roof over-hangs to create deep eaves and a car port area both of which offer nest sites for martins and swallows. But the sky is empty, or rather it is full of pigeons though they will not have affected the absence or otherwise of summer visitors.

This unpredictability comes with woodland flora too. Three examples from my woodland are helleborines, akin to orchids, that come up some years and not others, though this may be related with slug damage; morels, that lovely edible fungus of mid-spring, is very wayward in showing itself; and yellow archangel numbers rise and fall with the cycle of coppicing.

One aim of research is to reduce unpredictability by understanding not only ecosystems but factors that influence production. Forest Research have this year made two advances in helping us. At the Institute of Chartered Foresters national conference at the end of April FR launched *Forest Yield*, the digital version of the blue book, which can be loaded on to any desktop. At your fingertips is a step change improvement in forecasting yield. The other recent release is the latest version of *Forest Gales* which helps us manage the risk of windthrow and the new version, building on all the latest info, is more cautious about cutting in anticipation and encourages longer retention of stands. Neither of these advances quite fit my title of 'high summer', but both represent a new high in managing the unmanageable or taming the untameable which is what silviculture grapples with.

Do visit FR's website for more information about these management tools and how you can obtain them at very little cost.

But back to unpredictability. Can we expect to see in the future a step change in exploitation of – or simply better use of – the untapped increment in long neglected lowland woods and forests? It is the broadleaved or hardwood element that is so under used with the potential of some millions of cubic metres coming to market sustainably each year.

As we have commented more than once before in this piece, neglect is rarely a good option. Judicious thinning or commencing regeneration brings wood to market, brings light to the dark forest floor, provides employment and is generally a win:win for all concerned. The Forestry Commission in south-east England is keen to help where it can.

Forgive the unpredictability of this article as it has jumped around from topic to topic. And I may have to take a break in the next issue as I shall be back in Swaziland in southern Africa, when FTN's editor next chases me, looking again at sustainability of plantations as rotation succeeds rotation on the same site. What is now predictable is that, by and large, plantation forestry, when carried out with sensible silviculture and due regard to the site, is wholly sustainable. We weren't so sure of this 50 years ago.

Enjoy the summer.

www.forestry.gov.uk/forestresearch

THE SHARP END

FTN contractor columnist **Norman Hall-Gardiner** on working alone

Never alone with GPS

Working in forestry is considerably safer today than when I first picked up a chainsaw in 1977. Many hitherto dangerous operations can now be carried out from the relative safety of a cab, while regulation relating to training, competence, and health and safety in general, have all contributed. Nevertheless, there is still one aspect of the industry that, by its nature, is difficult to regulate – lone working.

Forestry can be a solitary occupation; indeed, for many this is part of the attraction. However, add to lone working the dangers of a challenging physical environment and its remoteness, and one can have a situation where an otherwise non-life-threatening accident could have fatal consequences. Clearly, a total ban on lone working is unfeasible. In its absence, what can be done to ensure that the lone worker will receive help as quickly as possible, should he or she encounter some misfortune, and taking into account the fact that mobile networks are far from universal?

Some form of 'buddy' system is an option, whereby the lone worker checks-in at pre-arranged times. Failure to do so would hopefully result in an emergency procedure swinging into action. Yet if the victim is to be away from base for a day, or even an hour, the delay between an incapacitating event and the 'buddy' being aware that something is wrong could be disastrous. Consider also that a vast area of forest or hill could be involved, and the potential consequences are clear. Without a guarantee of mobile coverage, what other options are there? Technology has provided the answer, in the form of the Global Positioning System, or GPS.

There are very few places on the surface of the planet that can't receive GPS signals from satellites. It follows that there are very few places from which one can't send a signal back to a satellite, and this is where the satellite messenger comes in. In its simplest configuration, press what is in effect a panic button, and one's coordinates are almost instantly relayed to the relevant emergency services; no need to find a number, speak to anyone, or provide a location – just press a button.

The units themselves, such as the Spot Gen3 (*below*), cost around £100. To that add the subscription to the relevant messaging service, around £100 a year. This provides not only the SOS service, but also various levels of messaging to family and friends, plus remote tracking. For £2 a week, it's a bargain. The equation is simple – if, like me, you work on your own in remote locations, get one!

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