

Trees & Timber

Andrew Heald MICFor
October 2019



Timber Resources Overview

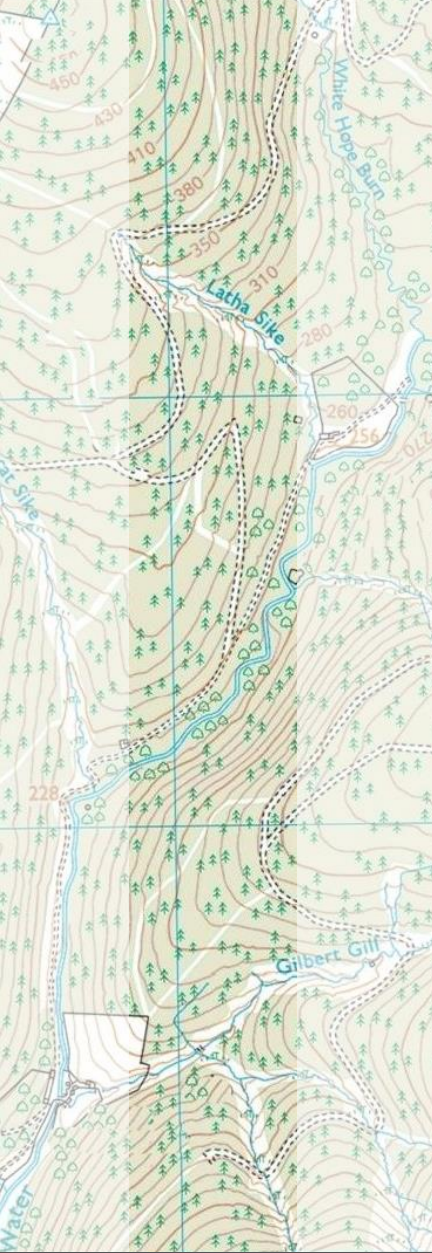
- Global demand for forest products will double by 2050
- UK 2nd biggest importer in the world
- UK has only 13% forest cover
- Over £60 Million per year invested in Scottish wood processing capacity



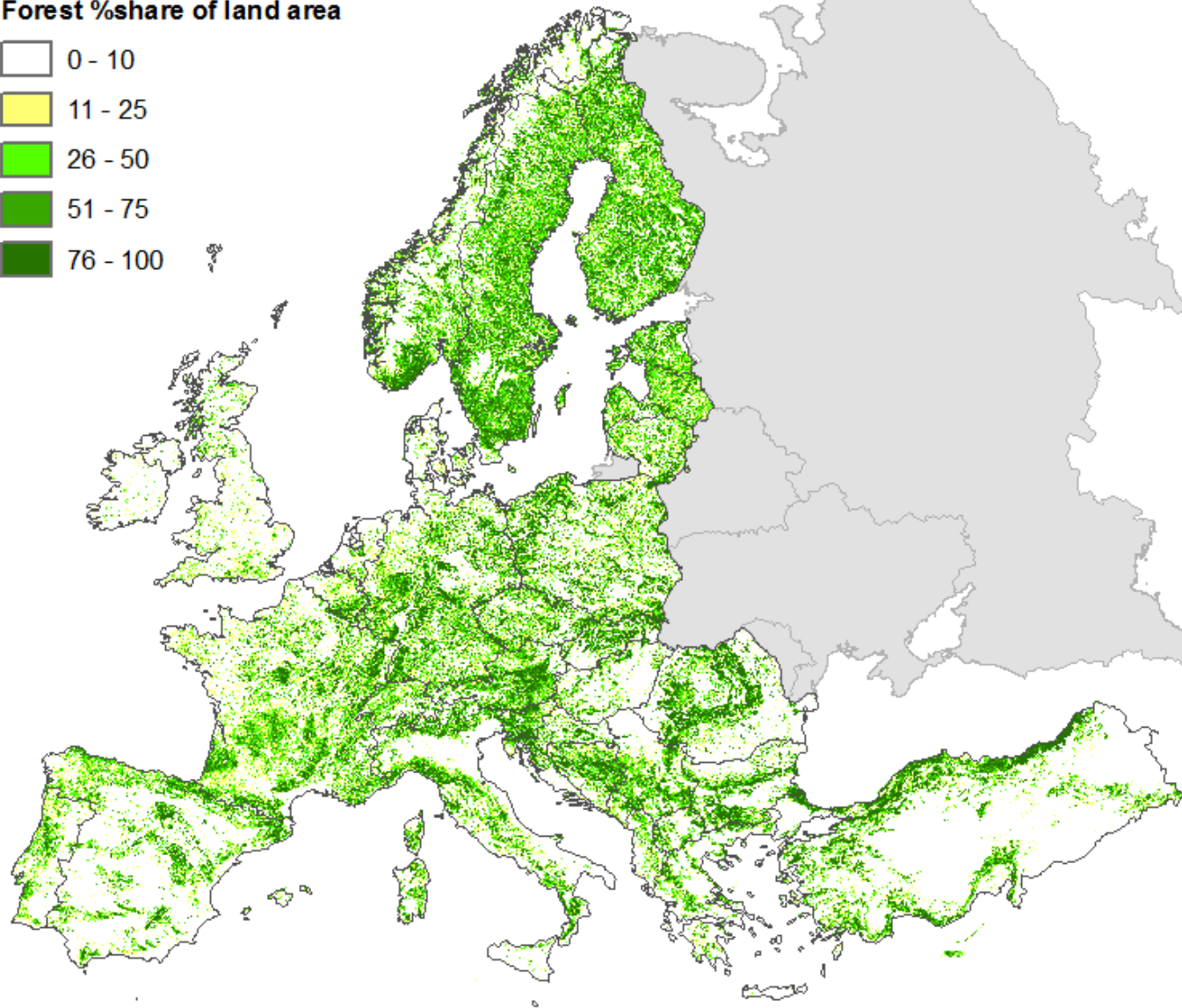
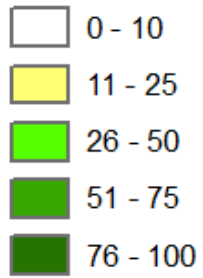
Projected annual rate of wood removals in 2030 and 2050

	FAO 2010	LIVING FORESTS MODEL			
		2030		2050	
		Do Nothing	Bioenergy Plus	Do Nothing	Bioenergy Plus
Saw logs & veneer logs	853	1,444	1,444	1,763	1,773
Pulpwood*	527	754	754	905	893
Other industrial roundwood ¹⁹	153	153	153	153	153
Energy wood	1,868	2,753	3,138	6,317	8,209
Household fuelwood		2,064	2,064	2,218	2,054
Total wood supply	3,401	7,168	7,553	11,356	13,082

Units: millions of cubic metres (roundwood equivalent)

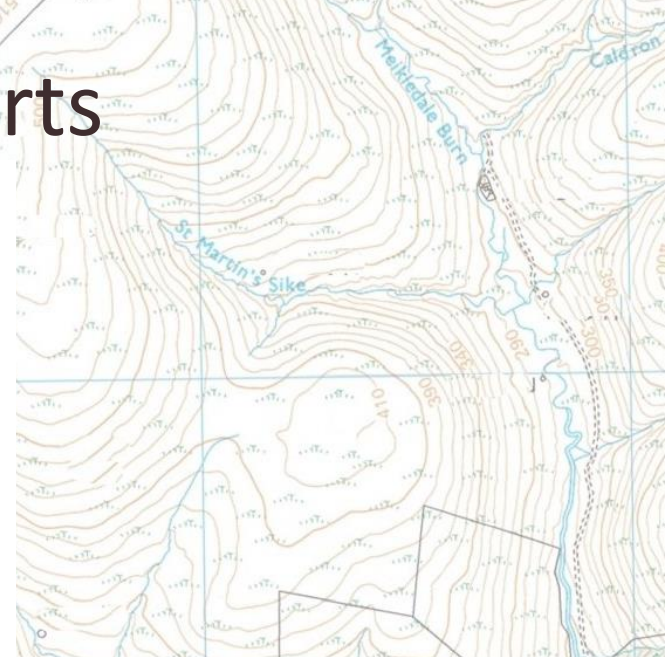
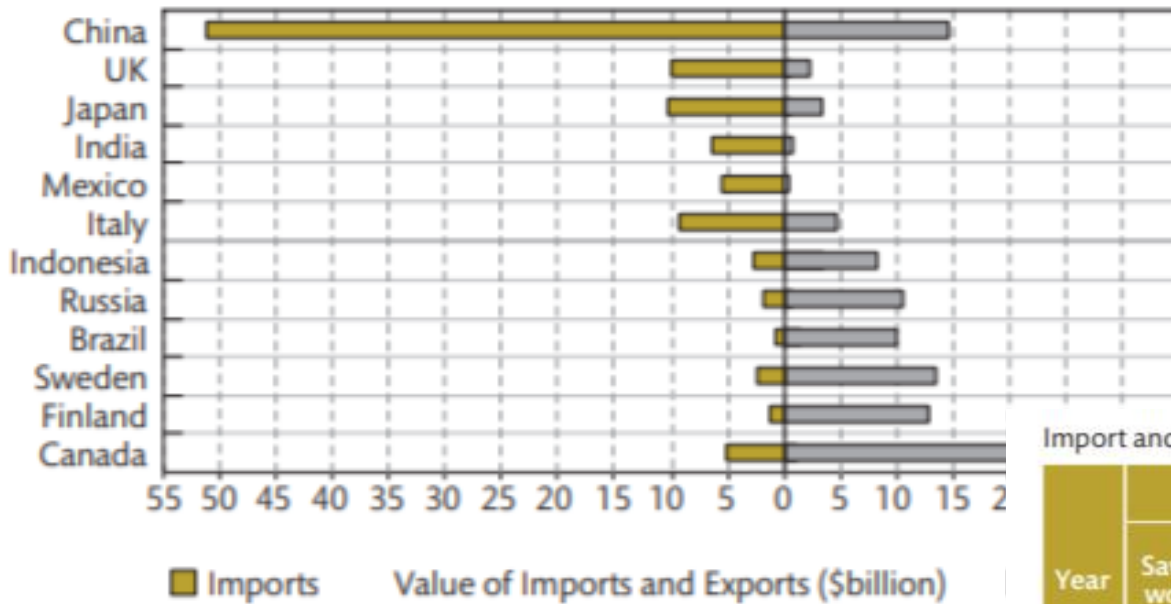


Forest %share of land area



Timber Imports

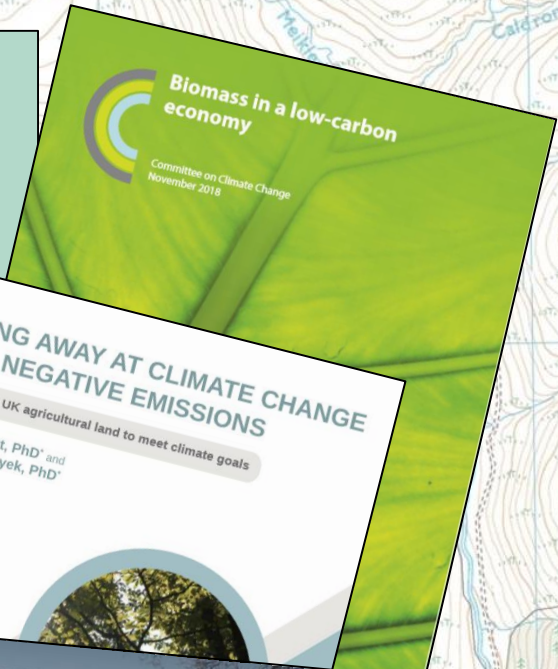
Largest net importers and exporters of forest products 2017



Import and export volumes

Year	Imports				Exports		
	Sawn-wood	Other wood	Wood-based panels	Pulp & paper	Wood (sawn & other)	Wood-based panels	Pulp & paper
	(000 m ³)			(000 t)	(000 m ³)		(000 t)
2014	6425	8393	3260	7319	1403	404	5467
2015	6323	11107	3215	7560	1335	286	5712
2016	6794	11158	3410	7092	1034	314	5700
2017	7663	11569	3800	6798	1044	374	5528
2018	7213	13595	3878	6711	925	295	5326





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Why doubling t climate chaos

Offsite Construction

A – Panelised Construction 2-dimensional (2)
 B – Modular/Volumetric 3D
 C – Hybrid 2D + 3D
 D – Sub-assemblies and components

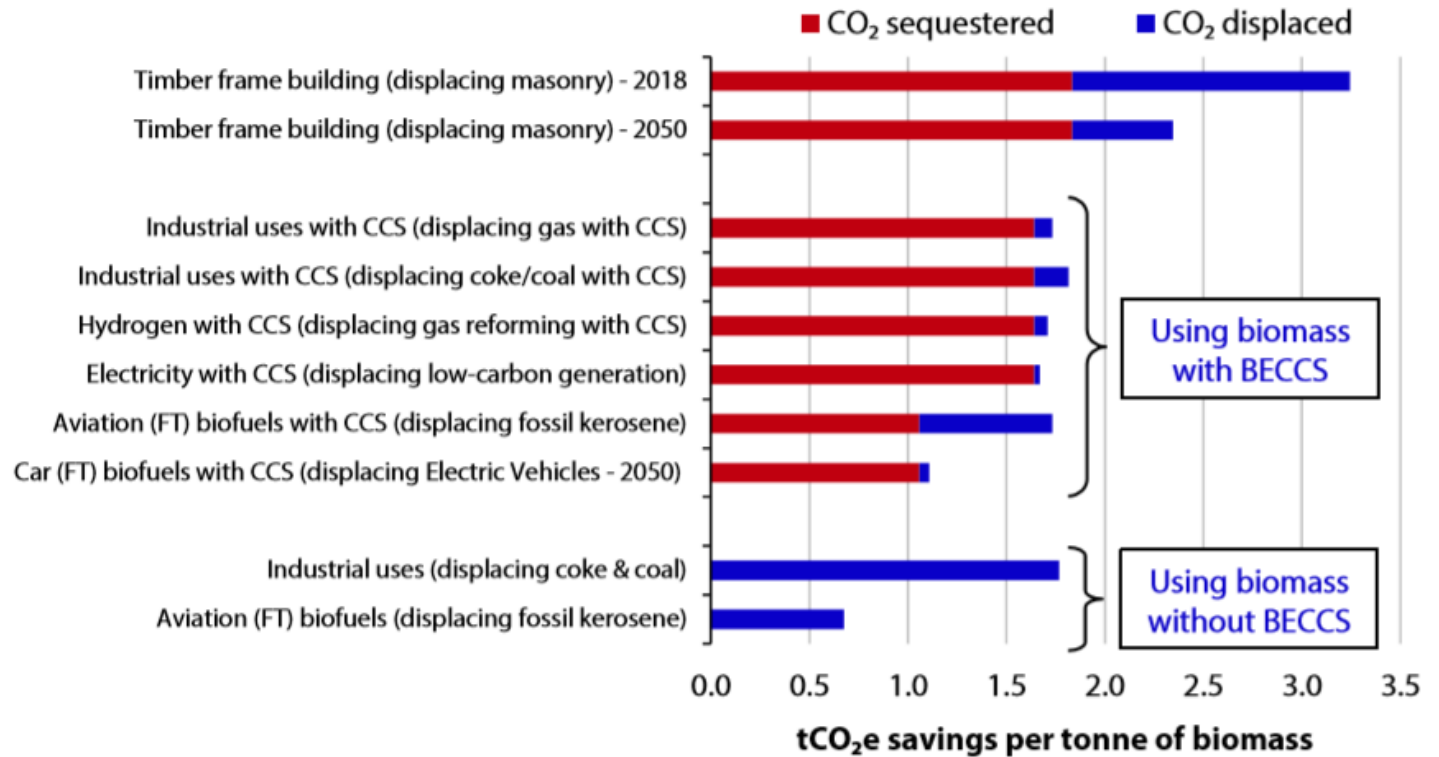
Hairstans, R. (2016) "Building Offsite" Journal of the National Institute of Building Sciences, Vol. 4, No. 2

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Figure B5.4. Estimated GHG abatement across different biomass applications



Source: CCC (2018) *Biomass in a low-carbon economy*.

Notes: Shows estimates of GHG abatement provided by an oven dried tonne of biomass used in various sectors, considering an appropriate counterfactual (i.e. what we would expect it to be displacing, long-term).

Committee on Climate Change

Climate Change is Key

“The UK has ambition amounting to annual afforestation rates of **20,000** hectares.

Current rates are short of this ambition, at just under **15,000** hectares.

In more ambitious scenarios, we assume annual planting rates of **50,000** hectares.”

8-18
MtCO₂e Saved



Increased woodland
and hedgerow
planting

Nationally, action is required to do the following:

26-36%



Reduction in
grasslands and rough
grazing by 2050

(up to) 1.5 million
hectares



of new woodland
to store carbon
by 2050

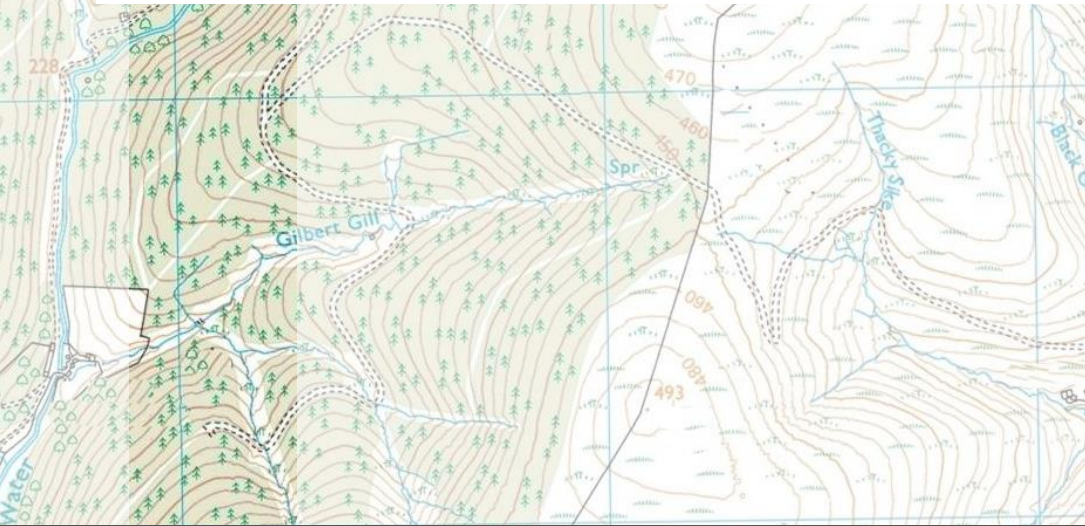
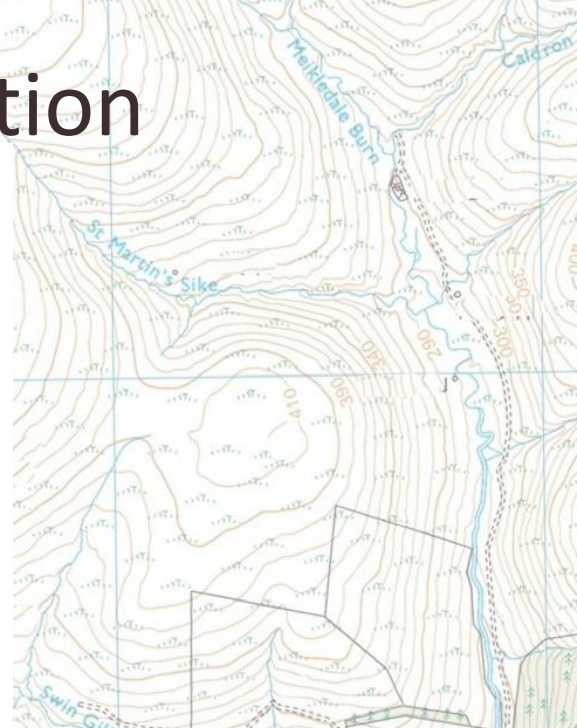
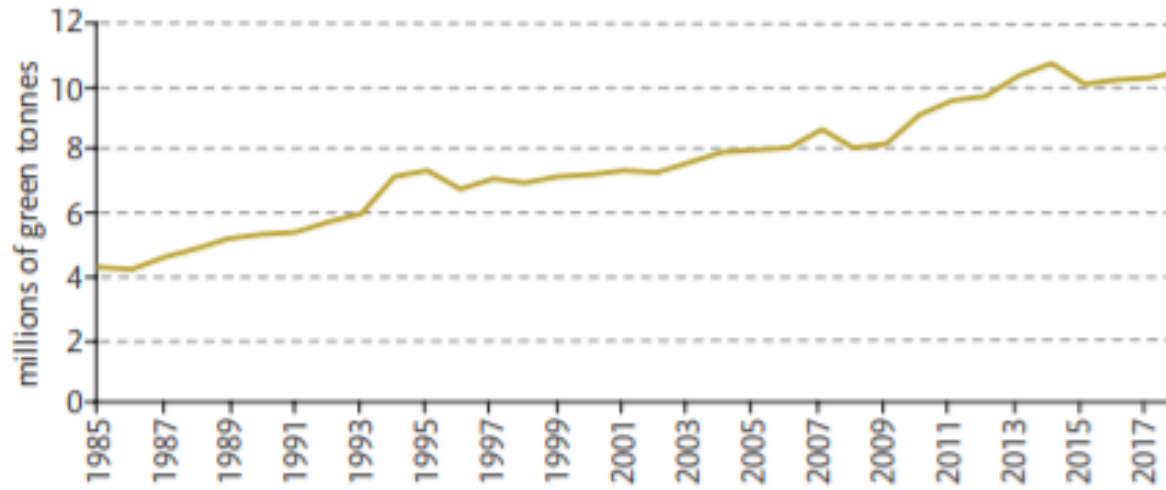
(up to) 1.2 million
hectares



for
bioenergy crops
by 2050

UK Timber Production

Softwood deliveries





Softwood deliveries (thousands of green tonnes)

Year	Sawmills	Pulpmills	Woodbased panels	Fencing	Woodfuel	Other	Roundwood exports	Total
2014	6725	465	1283	317	1500	176	437	10903
2015	6168	435	1334	288	1600	164	276	10265
2016	6511	423	1248	277	1550	178	231	10419
2017	6572	442	1059	295	1600	170	331	10468
2018	6434	486	1210	273	1900	174	264	10741



UK TIMBER PROCESSING MILLS TIMBER INTAKE

Timber Processors

-  Pulp & paper mill
-  Softwood sawmill, Small
-  Softwood sawmill, Medium
-  Softwood sawmill, Large
-  Mixed/Hardwood sawmill, Small
-  Wood based panels, Small
-  Wood based panels, Medium
-  Wood based panels, Large
-  Round fencing, Small
-  Round fencing, Medium
-  Round fencing, Large
-  Energy, Small
-  Energy, Medium
-  Energy, Large
-  Infrastructure
-  Animal bedding, small

N Scale 1:1,250,000



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2018/12



Scottish timber and biomass investments this decade

Gordon 150
TIMBER
£20m

BSW
£63m

UPM
£75m

GLENNON BROTHERS
£14m

James Jones & Sons Limited
£65m

BSW
£6m

BALCAS
£24m

ESTOVER
£75m

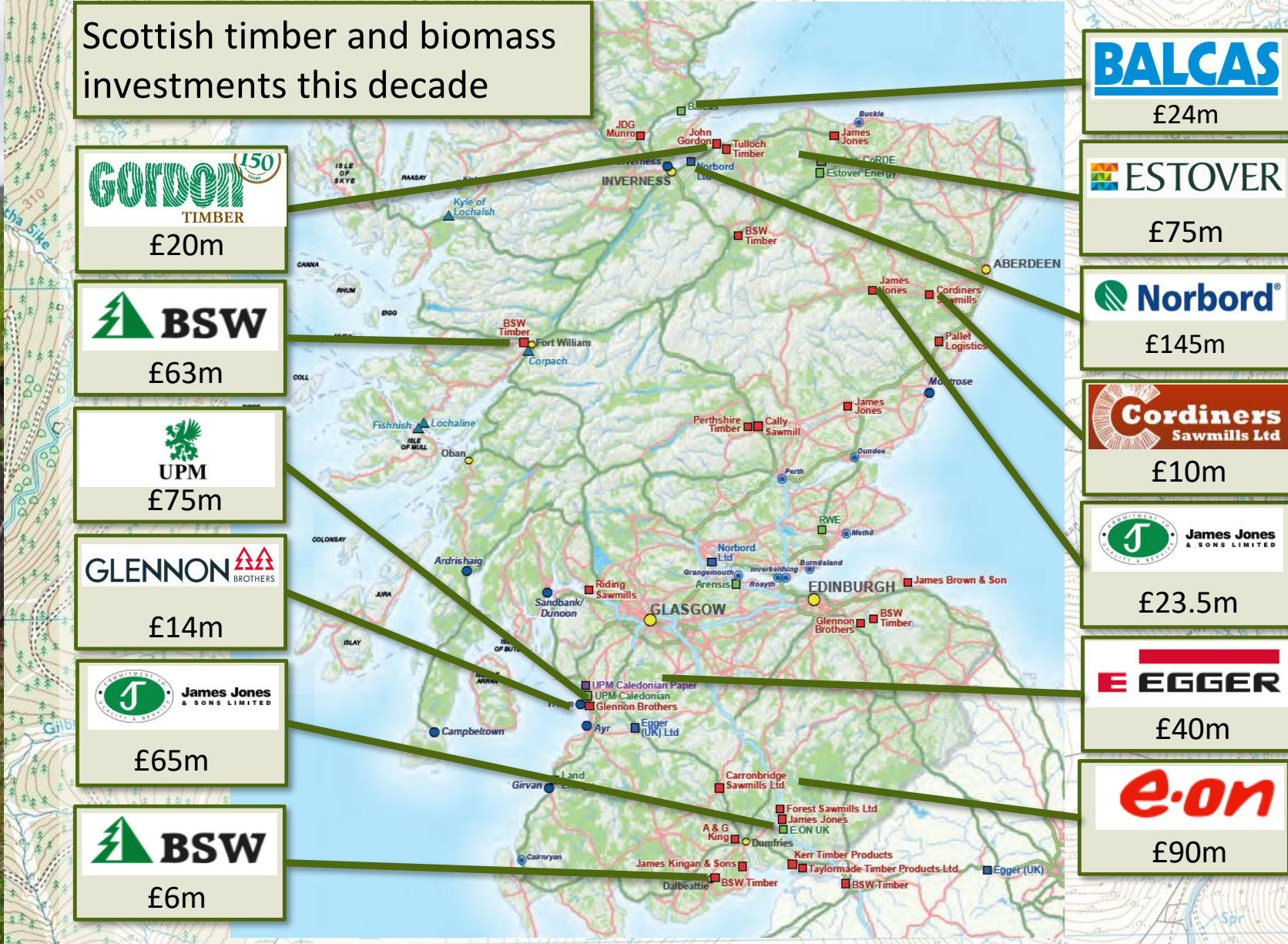
Norbord
£145m

Cordiners Sawmills Ltd
£10m

James Jones & Sons Limited
£23.5m

EGGER
£40m

e-on
£90m

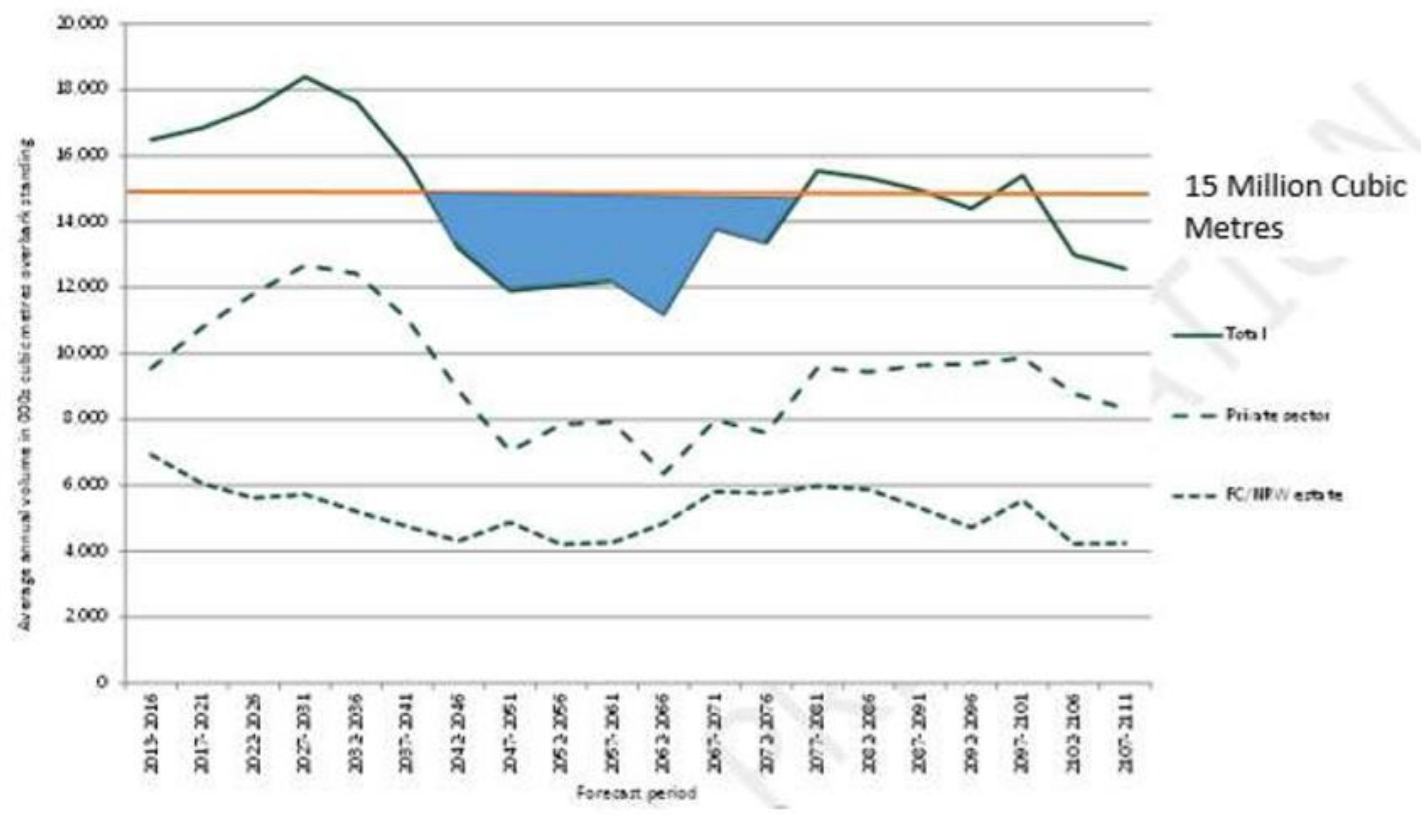


URGENT

Long term production forecast

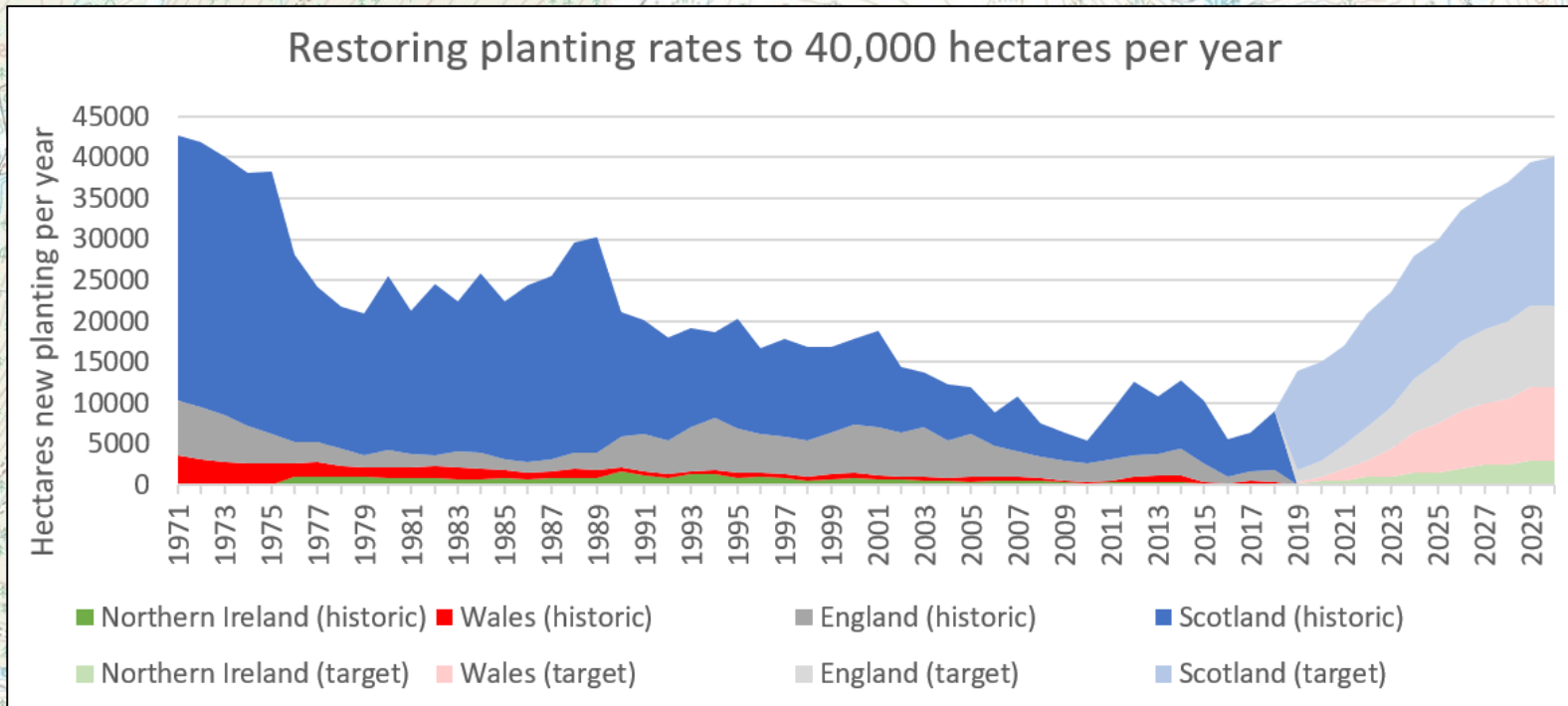
The Scottish Forestry Strategy

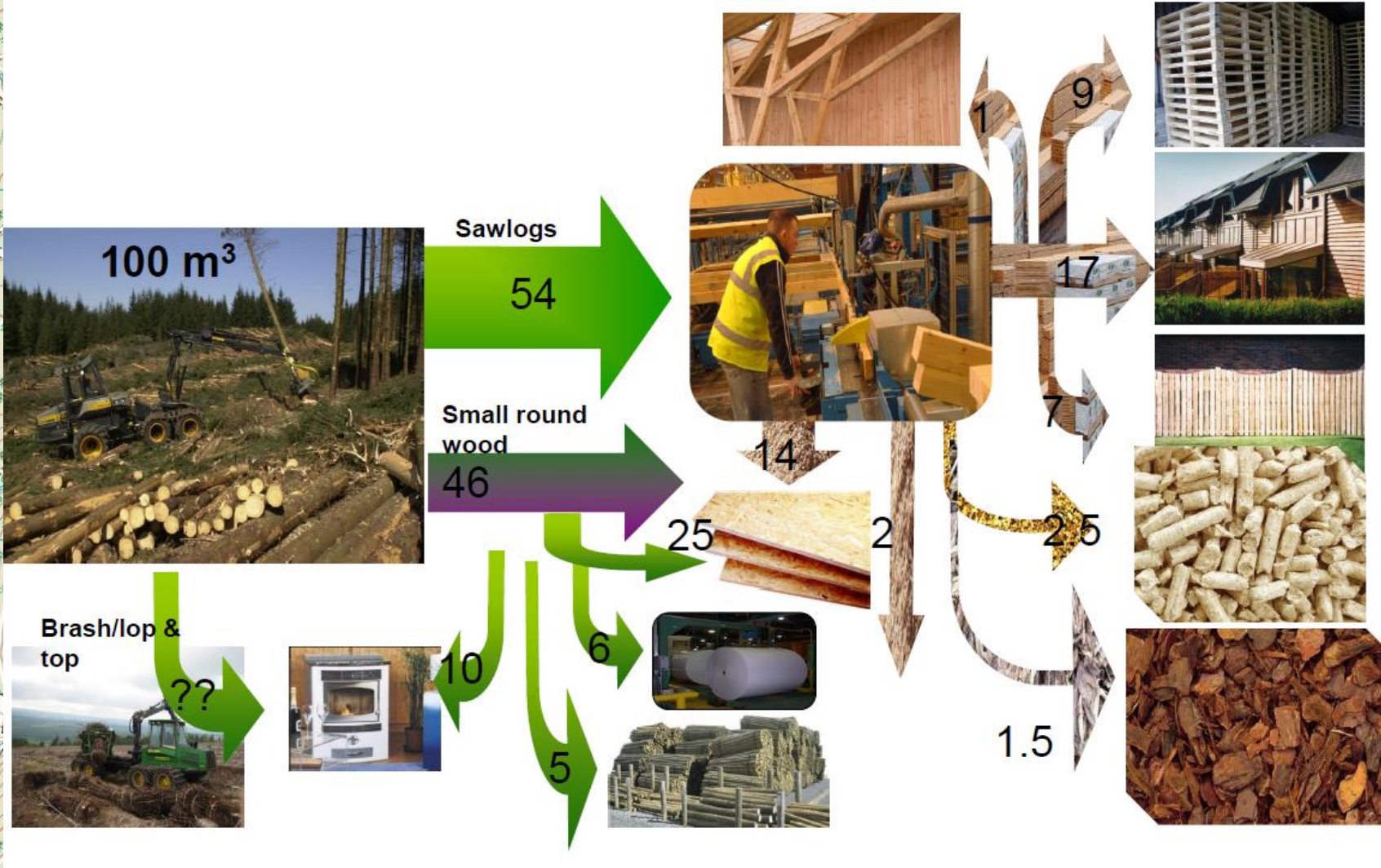
Figure 1 - 100 year forecast of GB Softwood Availability – the missing millions



Planting targets

policy







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Confor is a membership organisation that promotes sustainable forestry and wood-using businesses.

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THINK
GLOBAL
PLANT
LOCAL

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@andyheald

THE BEST TIME
TO PLANT A TREE

— IS 20 YEARS AGO —

THE SECOND BEST TIME IS NOW

chinese proverb




HUSTLE + GRIND

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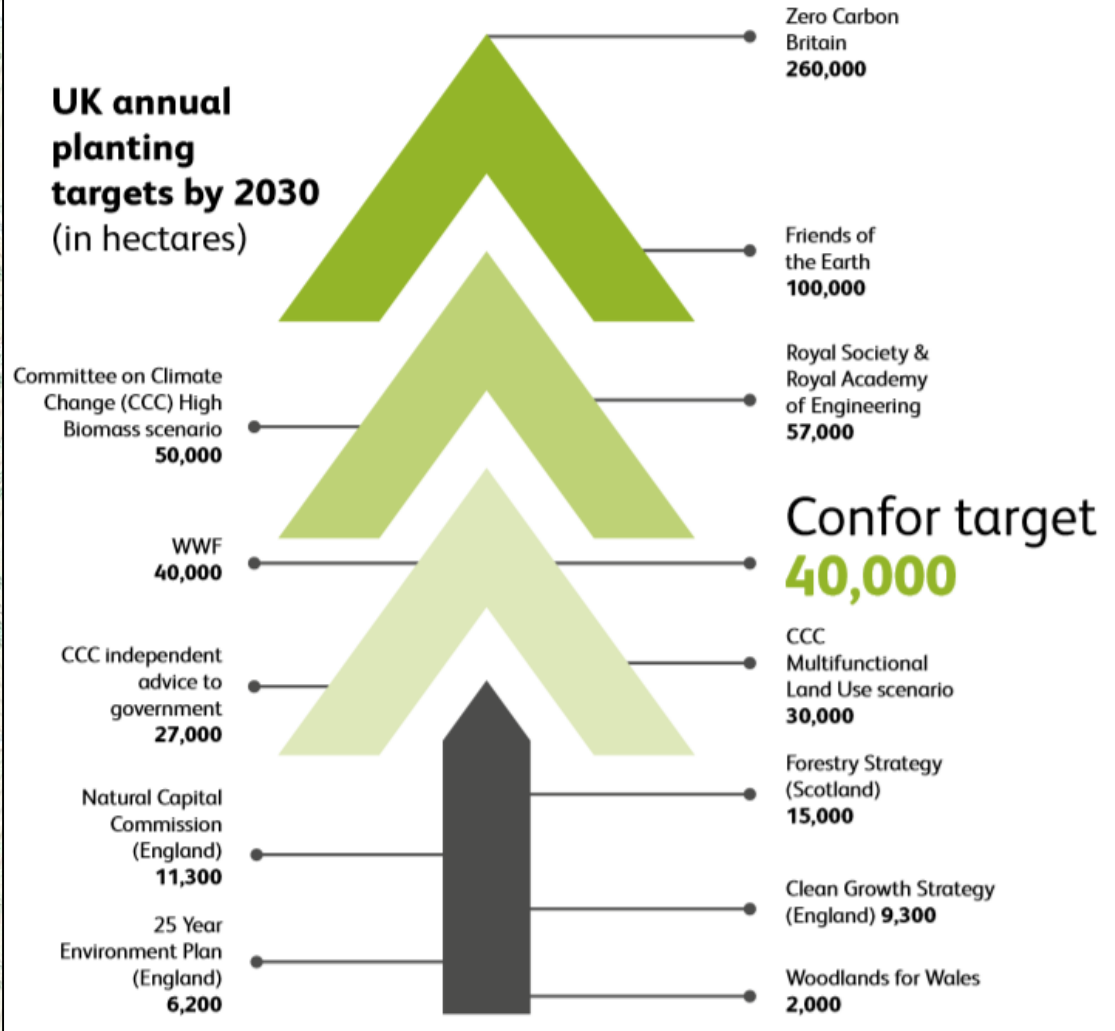
Andrew.Heald@Confor.Org.UK

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Planting targets

Confor Call

UK annual planting targets by 2030 (in hectares)



UK timber imports

Carbon displacement

