

New value from multi-functional forests

Jez Ralph reports from the EIPAgri workshop on NTFP supply chains



Like agroforestry and tourism, non-timber forest products (NTFPs) are usually considered fringe economic activities of forestry that are talked about more than their potential is ever realised. Yet over 90% of us regularly use and purchase forest-derived products. Think foliage and moss in floristry, wild mushroom packs in supermarkets, decorative cones, holly and mistletoe, the cork in last night's bottle of wine.

In an effort to drive forward technological advances that may create a growing industry, EIPAgri (The European Commission's agricultural innovation body) recently invited a group of forest supply chain experts to a workshop in Vienna to consider mechanisms for the development of serious NTFP supply chains.

It has always seemed a loss of potential that the vast volume of empty space and forest floor within a forest remains unused and under-

utilised. However, without good precedents that show how NTFPs can provide a real profitable product line, it will always be difficult to justify the investment needed to develop business ideas. At the workshop, amongst the usual case studies of wild mushroom markets and the highlighted benefits of extensive grazing of livestock in woodland and woodland for leisure activities - all of which offer relevant and interesting development opportunities - a number of new potential value chains stood out.

In particular those concentrating on technological advances to open up markets: a new drive towards bio-distillation of pine needles for resins, pharmaceuticals etc; the pulping of waste bark to create bio-composites for use in the burgeoning 3D printing sector; shade-tolerant herb and flower horticulture under canopy cover; grafting from plus trees to create pine orchards for the pine kernel industry on infertile land.

A helping hand from technology: from traceability to redistributed manufacturing

Technology is providing a mechanism to develop products where previously the usual risk of NTFP development - lack of scale, low volume, niche markets, high costs - created a high level of vulnerability for businesses. This is especially true in the case of food products from

forests where a raft of legislation and also customer requirements demand traceability that can now be provided through use of now standard GPS enabled phones, apps and GIS software in a similar way to timber traceability. Likewise, issues of consistency in quality and supply, whether it be for niche fungus or bike trails, can be offset through digital aggregation of stocks and common selling through the web. Furthermore, advances in processing, such as small-scale distillation, is allowing localized producers to bring product to market cost-effectively.

This new world of "redistributed manufacturing" is taking hold in a huge variety of industries, not least of which agriculture, making use of relatively cheap digital technologies and both the timber and non-timber forest products are ripe for development and digital take up.



Market the product, sell the story behind it

Whilst market assessments for new products can be difficult and legislation (especially in the case of producing and selling food crops) could make the timber world of felling licences seem child's play, in one area at least it seems forest products have a distinct promotional advantage over agricultural production. The idea of the traditional, the cultural and the wild connection to the forest can be harnessed in the same way the local food movement harness concepts of localness that draw in relatively high-spending demographics and small-volume niche products.

Potentially we are seeing a coming-of-age for non-timber products from our forests using technology to create production efficiencies and find markets within an increasing affluent population. Volume and niche markets, end use and part processed markets are beginning to be serviced from a maturing sector across Europe. And of course, the point of the workshop, European aid in the form of collaborative ventures and capital investment funding is available for development of these new products and services.

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Do you exploit NTFPs as part of your business? Share your experience with us!
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Moss is a widely used NTFP. It is used for decorative purposes, and dyed varieties are available. Credit: gardeners.com



Some web resources on non-timber forest products

ForestHarvest is a website dedicated to Scotland's wild and woodland products. It includes a directory of some of the businesses which are trading in wild harvested and woodland products.
www.forestharvest.org.uk

StarTree is a pan-European project to support the sustainable exploitation of forest resources for rural development. The webpage features regional case studies for West Wales and Scotland.
<http://star-tree.eu/>

The **Forestry Commission** has a webpage on non-timber forest products:
www.forestry.gov.uk/fr/infd-5xney5