FORESTRY & TIMBER NEWS

June 2020 Issue 99

Confor
Promoting forestry and wood

Green shoots of recovery

As we emerge from lockdown

Confor
Promoting forestry and wood

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Published by Countrywide Publications, Fountain Way, Reydon, Suffolk IP18 6SZ on behalf of Confor.

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Printed by Micropress Printers Ltd

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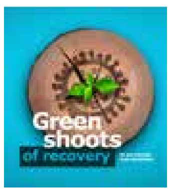
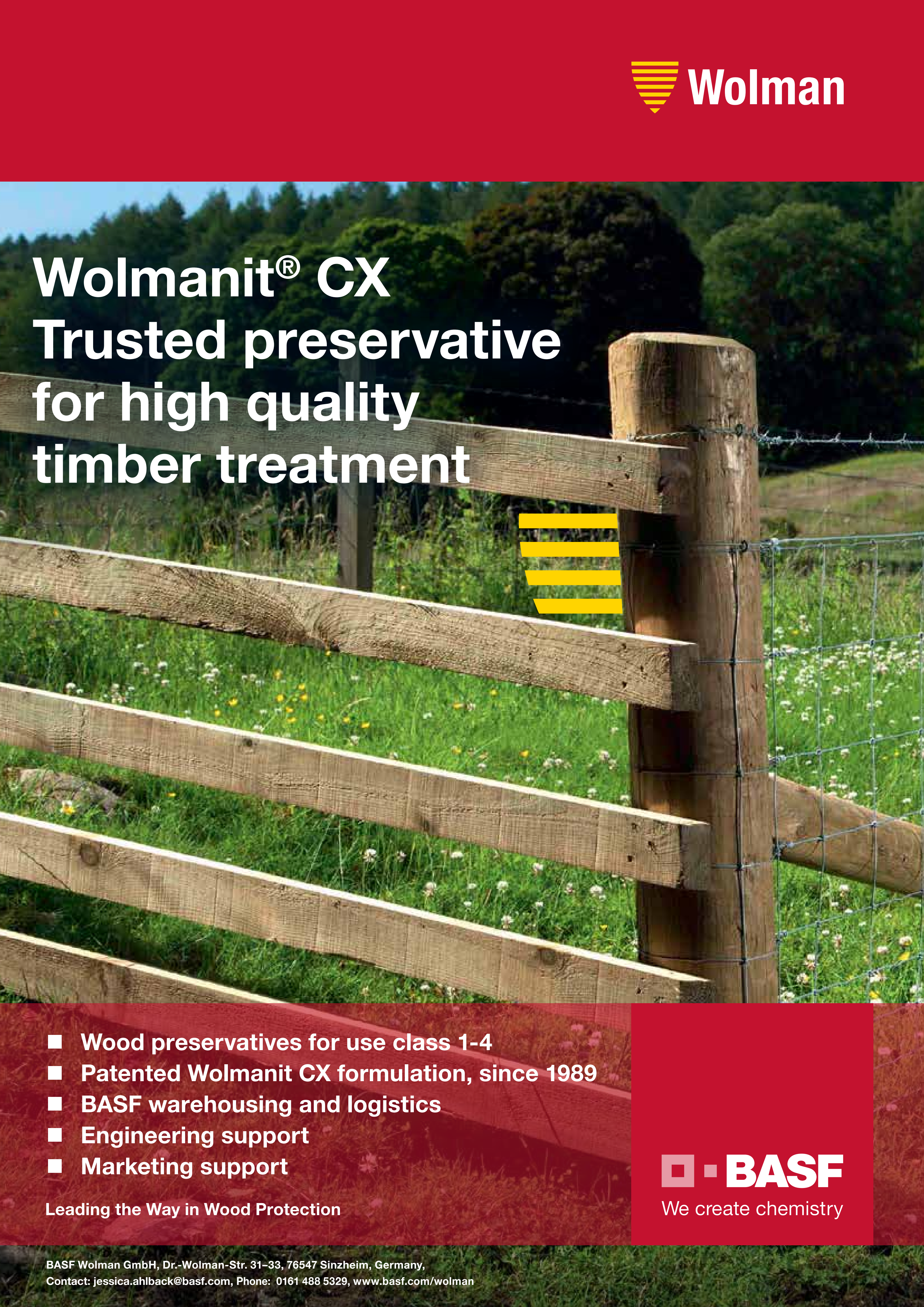
As we move into Restart and Recovery phase, the logo used for Confor's Covid-19 coverage evolved to represent our sector's resilience and its role in Green Recovery.
Design by A. Wrona

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Meeting the challenges head on

STUART GOODALL CHIEF EXECUTIVE, CONFOR

It needs no saying that it's been an extraordinary few months, and that state of affairs is set to continue as we each find our way towards some form of 'new normal'.

While it isn't clear how long this outbreak will last, I'm buoyed by the knowledge gleaned from meeting hundreds of people over 30 years that we are a resilient, practical and inventive industry.

Confor's priority during the pandemic has been to help ensure as many businesses as possible can carry on working, and to do our best to help everyone access relevant information, advice and financial support – where that's available. This is driven through our online Covid-19 Hub and continued email communications – if you aren't receiving these please do check your spam and make sure we have your up-to-date email address.

We are also supporting businesses to restart by playing a leading role in the development of safe working protocols across the supply chain and supporting FISA as it prepares a more detailed protocol for in-forest activity, following our early positive work with the Forestry Contracting Association.

We've also begun a series of well-attended webinars, which all members are encouraged to join - or view them afterwards.

I'm very grateful to the many members who have written to say how much they appreciate the continued support that the Confor team has provided. However, we all realise that there are still big challenges ahead. As ever, do get in touch if you feel there's more we could do for the sector.

There are certainly companies out there who are finding things tough, and I've spoken with some small businesses who are very worried about their medium-term viability even if markets for wood begin to pick up.

We have already been talking to governments and enterprise agencies across the UK about the need for our industry to be a key part of what is increasingly being referred to as a 'green recovery', and this will gain momentum in the coming weeks and months.

Reflecting on the past few months, it has been, and continues to be, some of the most challenging of times for all of us in both a business and a personal sense. On behalf of all at Confor I would like to wish you all our best in the coming weeks and months.

We are privileged to work with trees and wood, something that society needs and benefits from in so many ways – there is a bright future beyond this current crisis. In the meantime, I'm determined that I and Confor colleagues will do what we can to help.

Sector moves closer to a green recovery

Confor's **Andy Leitch** looks at how the Corona crisis has treated the forestry and timber supply chain and how collaborative working in a crisis can bring excellent results at pace.

When the UK government responded to the threat of Covid-19 by introducing a lockdown in early March, it soon became clear that our forest industries sector was in a great place to play an important part in supporting essential services throughout this crisis.

Confor responded quickly engaging with governments and its officials to identify which parts of our sector were required to support the supply chain of essential products and services. Part of that process has been to work closely with public sector agencies, other trade associations and industry representatives to develop safe working protocols for all forest and wood-processing operations.

Our sector continues to play its part, with a small army of people across the UK having prepared, harvested, transported and processed tens if not hundreds of thousands of tonnes of timber to date, which has been converted into products for essential services such as food distribution, packaging for medical supplies and wood energy products for care homes and hospitals.

Unfortunately, not all the sector was required to support essential services and many businesses have had to close during lockdown. Others, such as forest nurseries and establishment/maintenance operatives, managed to restart relatively quickly by introducing robust social distancing protocols, but at a greatly reduced capacity.

Restart

As we move into the formal restart phase, new FISA guidelines, endorsed by HSE, Working safely during coronavirus (COVID-19) in Forestry are expected to be published imminently. These will provide a sound platform for most forest-based operations across the private and public sector to restart very soon. It must be noted that the speed in which these guidelines were brought together by the working group, led by Jason Liggins of Forestry and Land Scotland (FLS), was outstanding. An illustration of how collaborative working in a crisis can bring excellent results at pace.

Confor are also actively working with a number of sawmills, panel board processors and the HSE to develop and publish appropriate standard guidelines for working safely with Covid for this part of the supply chain, as more mills re-open and production increases in line with demand.

As we move forward into the restart phase it might be useful to take stock of the impact to date and what might be the key issues arising across the supply chain (right).

Summary

In summary, the economic impact of this awful pandemic has been much less on our sector than others, such as aviation and hospitality. We have made a positive contribution to supporting supply chains for essential services and will continue to do so, while other parts of the sector managed to operate at some level by quickly adopted safe working protocols during lockdown. However, unfortunately, a proportion of businesses in the sector had to close.

Therefore, news of a restart phase in all parts of the UK is very welcome and is positive sign for the sector moving forward, however, a slow start is anticipated and it is important to note that issues such as cash flow and market demand are significant threats to the viability of some businesses during this phase.

Impact of the crisis

Nurseries

The impact of lockdown on plant production may not be as great as initially feared. Most of this year's stock has been dispatched, although some notable losses are predicted due to order cancellations and the following two year's production is forecast to be reduced, but interim forecasts suggest there will be sufficient production to meet forecast demand, although there may be some shortages in some non-spruce conifers and broadleaves. A more accurate position for the next two years production will not be known for a few weeks until lining out and sewing operations are complete. The public sector nurseries made the decision to close during lockdown and the true impact on their production for the next two years will not be known for some time, however, Newton is trialling a new seeding system *(see 'Innovative approach for better seed growing technologies', p52)* that could significantly mitigate the impact of their closure through lockdown on the next two years production.

Read more about nurseries during Covid-19 on page 14

across our supply chain

Establishment and maintenance

Initially, planting operations almost came to a halt, but by adopting clear social distancing and hygiene protocols planting recommenced in many parts of the country, albeit in a reduced capacity. Contractors report that finding effective methods of safe travel to site as one of the most challenging issues, the new FISA guidance should help with this. Many have also found it difficult to find accommodation during the lockdown period and this might continue to be an issue until the hospitality sector restarts.

Forest managers are reporting that planting continues, possibly through to June and back-end planting is considered as an option subject to ground conditions and availability of plants and labour. Weevil spraying has also commenced in most parts of the country.

Establishment activity in the public sector estate has been greatly reduced or stopped since lockdown and it is envisaged to recommence as we move into restart phase across the UK.

At present, it not clear how much of the planting programme (woodland creation, restock and beating-up) will not be achieved this year, but it will certainly be below what was planned and potentially have some short-term impact on carbon sequestration targets.

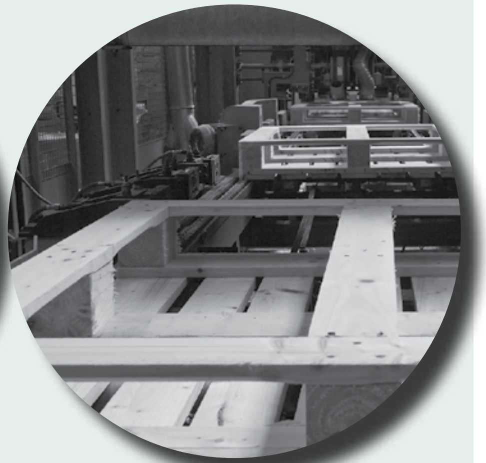
Hear more from planters during Covid19 on page 18

Harvesting and haulage

Harvesting activity has been reported at 40-70% capacity across the public and private sector estates throughout lockdown period. Where possible suppliers have worked positively with customers by bringing forward suitable parcels to meet demand for material for essential services. Many harvesting teams are currently working on a fixed quota, although activity is predicted to increase, and some haulage drivers are already being called back early from furlough. Rate of increase in harvesting operations will be most influenced by demand for end-product from the construction sector and this is an unknown quantity at this time.

Results of a recent Confor survey of contractors and small businesses highlighted cash flow and market demand being the two greatest threats to their business in the next 12 months.

Read about how Euroforest experienced the lockdown on page 23



Sawmilling and wood processing

Sawmills producing material for essential services have reportedly been running at 40-70% of capacity throughout lockdown, whilst others are just moving into restart phase.

Reports suggest that demand for fencing and garden products is very strong and the palletwood market remains good. There are signs that demand for construction timber is growing, albeit slowly, and any significant increased demand will be subject to how quickly the construction industry restarts. Demand for co-products is patchy across the country.

The panelboard sector has been particularly hit hard with the lockdown and production is running very much below capacity, but in line with demand from which was a virtually dormant construction sector through lockdown.

Looking ahead to a Green Recovery

Looking slightly further ahead, Confor are planning early discussions with government ministers and officials about how our sector can contribute positively to the longer-term recovery stage. There seems to be a lot of support developing for a ‘green recovery’ where government is being urged to focus post Covid-19 investment to support sectors that can make a positive impact on the environment, as well as the economy. Our focus will be on re-emphasising how much this sector can contribute to that agenda and we will report on our progress in due course.

Forestry and woodland events hit by Covid19 restrictions

APF postponed

NEW DATE
23-25
SEPTEMBER
2021

The directors of APF have taken the decision to postpone the event until next year. The ongoing uncertainties surrounding Covid19 left the directors of APF 2020 little option but to postpone the event this year. The revised plan is to roll forward the show to 23/24/25 September 2021 at the same venue at Ragley Estate.

"You will all be aware of the constantly changing advice as to what we are allowed, and not allowed to do and suggested dates when we might be resume some activities," said Exhibition Secretary, Ian Millward. He added that the decision was taken after carefully considering many elements including:

- The current ban on mass gatherings is still in place with no indication of if or when this restriction will be lifted.
- Recognising that exhibitors need to order stock and equipment for the show, much of which has a three month lead time and avoid the risk of exhibitors buying stock for the show which is then cancelled at short notice.
- Many businesses have been forced to close and equipment that some exhibitors would like to have for the show will not be available
- The potential lack of availability of nearby hotel accommodation for APF staff, exhibitors and visitors
- The proposed restrictions and quarantining of anyone visiting the UK will severely affect exhibitors, their staff and visitors from abroad being able to attend
- Social distancing rules making it very hard for exhibitors to engage with visitors safely
- Concerns about safety and business lockdowns affecting the number of exhibitors who attend.
- Concerns that safety issues will restrict visitor numbers and therefore badly affect trading levels for exhibitors
- Our ability to safely manage large numbers of visitors, maintain social distancing rules and provide toilets and catering.
- The need not to place an unnecessary potential burden on local emergency services by holding a mass gathering and recognising that currently police, ambulance and St John Ambulance are not attending any such events, with no indication of when they might do so.
- Concerns about our own staff's safety working at such a large event. Concerns raised by exhibitors about attending and whether it would be viable for them to do so.

Mr Millward added, "It is with a very heavy heart that we made this decision, but taking all of the above into account it became obvious that there was only one sensible option to take at this time and that was to postpone until September 2021. The show is the industry flagship event and everyone in the organising team are passionate about it and want to make it the best we possibly can. We simply cannot stage the event this year to the size and quality our exhibitors, sponsors, visitors and ourselves want in the light of the current restrictions. We sincerely hope that in 12 months time the world will have returned to something much closer to normal and we can run the event as we and everyone else want.

"We remain in a robust financial position and no exhibitor will lose their site fees. We will simply roll these forward to APF 2021. Any visitors who have already bought advance tickets can either carry forward their tickets to APF 2021 or request a refund.

"The show is a biannual event and after APF 2021 it will continue with this two-year cycle so the next event would be 2023 then 2025 etc.

"We hope that all our exhibitors, sponsors and visitors agree with our decision to postpone and that by doing so we can all have a far better event next year. We now have an extra year to plan so let's all come together to make APF 2021 a huge celebration of the forestry, arboricuture, trees and timber industry. Put the new dates in you diary now - 23/24/25 September 2021."

If you have any queries about any of the above please call 01428 723545 or email at **info@apfexhibition.co.uk**

Confor
WOODLAND SHOW 2022

Confor Woodland Show moves to 2022

As the APF gets postponed to 2021, the Confor Woodland Show, also scheduled for September 2021, gets pushed back to 2020.

Responding to the breaking APF news, Confor Woodland Show chairman Nick Hoare said: "I absolutely think that the APF team's decision of delaying the show by a year is sensible. A show this year would not have been good for exhibitors or visitors. That makes it natural for the Confor Woodland Show to move to 2022. From the earliest days as the South West Woodland Show we have always alternated years with the APF. In many ways I am quite excited and relieved. By 2022, not only will coronavirus be a bad memory, Brexit and trade deals will be sorted and we will be on the sunny uplands of ELMS possibly.

"I hope the rest of the show committee have had as much enjoyment as I have listening to people proud of how well they are managing 'distance working'. For over a decade, the Confor Woodland Show committee has been based in Devon/Wiltshire/Dorset/Suffolk/Edinburgh and it has been great."

Work goes on in forestry and policy

With the focus on managing Covid-19, attention has been diverted from other areas of forestry policy and delivery. However, although activity has slowed, grants and regulations, policy development such as rural support after Brexit, and plant health governance all remain essential. This article provides an overview of key developments.

Policy development, Brexit and consultations

Wales

Welsh Government have launched a co-design process for a post-Brexit Sustainable Farming Scheme for Wales focused on the proposed Farm Sustainability Review. Confor has been a primary reviewer on the Wales National Forest evidence review. The seven Wales Area Statements have been released on the website, outlining the key challenges facing that particular locality, how those challenges can be met, and how natural resources can be better managed.

England

The ELMS framework design consultation has been paused but the scheme is still being developed in the background. Defra wanted a richer, face-to-face, consultation which they were unable to do with lockdown restrictions. The urgent need to address the climate and biodiversity emergencies remains, and woodland creation is still seen as a key tool in any forward plans.

The Agriculture Bill, which will allow Government to introduce ambitious new land management schemes in England and provide for a seven year transition out of the CAP system, has returned to parliament. MPs voted electronically on the legislation in its last Commons stages on 13 May, meaning it is on track to pass by the summer.

A consultation on an England Tree Strategy is expected to open in June.

Scotland

The Agriculture (Retained EU Law and Data) (Scotland) Bill is at Stage 2 at Holyrood. Most of EU law, as it stands on exit day from the EU, will convert into UK law as 'retained EU Law'. The Bill ensures that on exit day, the Scottish Ministers will have the power to ensure that CAP legislation continues. This may be as it is or with any simplification or improvements they may want to make.

Plant health

New import controls

New measures have come into effect to safeguard the UK (coming in Scotland on 27 June), and our forestry and horticulture industries, from a range of plant health diseases and pests:

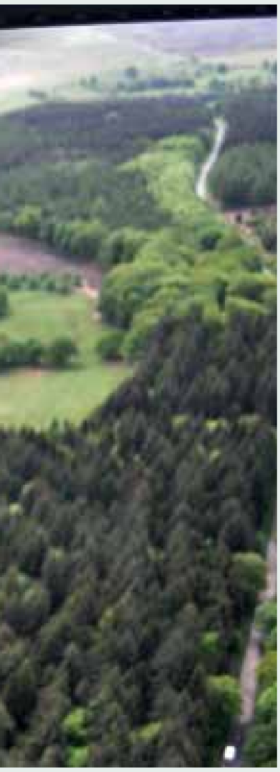
- **Xylella** – The import of *Coffea* and *Polygala myrtifolia* species is now prohibited, due to a high disease rate in these species, as well as stronger import requirements for other high-risk hosts (including Olive, Almond, Nerium Oleander, Lavender and Rosemary).
- **Emerald ash borer (beetle)** – New measures applying stronger import controls to countries within 100km of confirmed outbreak areas. This includes the removal of an option, within EU legislation, to remove the bark and sapwood to a depth of 2.5 cm for all countries regulated for emerald ash borer. This will help mitigate the risk of importing infected wood which

Grants and woodland creation

In Wales, the expression of interest window for Glastir Woodland Creation is open until 12 June 2020. There have been a number of changes to the application process explained in the on-line guidance. In England, claim times to apply for Countryside Stewardship have been extended to 15 June. In Scotland, the Forestry Grant Scheme (FGS) remains open, with demand strong for 2020 claim year, such that some options have now been closed (eg restructure regeneration) and others like tree health and forest infrastructure under budgetary pressure. All options are open for 2021 claim year.

FGS new woodland creation applications as at Feb 2020 (hectares)

Claim year	2020	2021	2022	2023+
Approved	7,114	1,147	411	534
Submitted - not yet approved	3,371	1,638	51	506
Sub-total	10,485	2,785	462	1,040
In pipeline	4,519	6,076	2,400	
Potential	**15,004**	**8,861**	**2,862**	



Aerial flights for Phytophthora ramorum and *Ips typographus* have restarted in mid-May in England. With a more precautionary approach to Covid in Scotland, other methods like drones are being used.

has not properly met the official requirements.

- **Plane tree wilt** – More stringent 'Protected Zone' requirements for the UK including measures for plane trees, intended for planting other than seeds, which must now have been grown throughout their life in a pest free area or an EU Protected Zone. The new requirements apply to imports to the UK from Albania, Armenia, Switzerland, Turkey, the United States and the EU-27.

Monitoring and control of established diseases

Oak Processionary Moth is established in southern, central and western Europe as far north as Great Britain, northern Germany and The Netherlands. In July 2019, the plant health service intercepted around 60 cases of oak processionary moth on recently planted trees in the Protected Zone imported from Europe. The Forestry Commission, Animal and Plant Health Agency (APHA) and the Devolved Administrations (Wales and Scotland) acted swiftly to deal with these findings which included the destruction of infested trees and caterpillar. In the UK, OPM is established in most of Greater London and in some surrounding counties in southeast England. The remainder of the United Kingdom (UK), during the transition period, continues to be designated a Protected Zone (PZ) with special restrictions on movements of oak plants to minimise the risk of introducing this pest to new areas. If you suspect or find OPM you must notify your local PHSI or to the Forestry Commission via TreeAlert.

Anecdotally members are reporting an increase in spread of Ash dieback. In Scotland, the Ash Dieback Risk Group are working with local authorities to incorporate ash dieback into their Corporate Risk Registers. The Welsh Government has committed to setup virtual meetings to make sure they are able to complete the ash die back strategy in the near future. Within the strategy there will be two sets of guidance for land managers, owners and regulators, focusing on high-risk and low risk ash. The health, safety and well-being of the public and those who work in the land management sector must be treated as a priority. They are hopefully that these documents can be presented for comment shortly and the sub-groups (research, communications and operations) are also being coordinated to support work in this area.

Webinar speakers

Sector uses online tools to communicate positive messages

Confor has embraced the shift to online events enforced by Covid-19, with three successful webinars engaging a wide range of members, politicians, the broader forestry industry and environmental bodies.

One common theme emerging from the webinars is that the crisis has highlighted forestry and wood processing as a significant industry in its own right - through its role in critical supply chains providing key products.

Lord Deben, Chair of the Committee on Climate Change (CCC), made this point at the first online meeting of the All-Party Parliamentary Group on Forestry and Tree Planting. He said the UK Government had to treat forestry and wood as an industry and realise the huge potential for the greater use of timber in construction. The Government had to move from words to action, he said, which included using its procurement power to ensure more wood was used in the construction of public buildings. He added: "We need to have many more buildings made of wood and that justifies the need to grow the industry to deliver that."

Stuart Goodall, Confor's CEO, told the APPG webinar that the role of the industry in helping supply critical products - pallets and packaging, biomass and agricultural fencing, as well as boards to fit out the Nightingale hospitals - had focused minds.

"I think many government officials have woken up to the fact that forestry and wood is an industry and not just a means to deliver biodiversity and leisure benefits," said Mr Goodall. . "Confor is in talks with DEFRA and counterparts around the UK to discuss what a green recovery will look like and how forestry and greater use of home-grown wood could play a role in that. I was delighted to hear Lord Deben talking about greater wood use and we will continue our regular dialogue with the CCC."

Caroline Ayre, Confor's National Manager for England, also stressed the point at the first two webinars - which looked at the industry response to Covid-19 and support for contractors during the crisis. Asked what she thought about how forestry and wood might emerge from the crisis, she said: "I'm an eternal optimist because we are a long-term business. What's come out is a recognition that we supply essential products and people are understanding how important we are in the running of their daily lives."

At the second webinar, Mrs Ayre described contractors as the "kingpin" of the sector and said Confor was doing everything possible to support them through the crisis.

Although short-term concerns about training contractors as a result of Covid-19 were expressed by Andrew Smith of the Scottish School of Forestry, benefits of the changes to work practices were also identified. Mark Curtis, a contractor who works in the Republic of Ireland, close to the border of Northern Ireland, thought the crisis had highlighted opportunities to complete paperwork online much more simply, quickly and efficiently - because it had to be done that way in the current circumstances.

The first webinar heard how Confor created the online hub to react to the unprecedented challenges of lockdown - giving members the information and guidance needed, then identifying immediate challenges.

Mr Goodall said the webinars highlighted positive new ways of working. High-quality webinars with sizeable, wide-ranging audiences could be arranged at short to discuss pressing issues and could be more inclusive than face-to-face events, as people might attend who wouldn't normally make it - for reasons of geography, cost or lack of time. "It's much easier for a busy individual to set aside an hour for a webinar than commit half a day or a full day to travel to an event," he added.

How will Confor events look like in the future?

Confor's Deputy Chief Executive Andy Leitch is exploring effective options for future virtual engagement with members and the wider sector, while understanding some members will want to meet in person as restrictions are lifted. However, Confor will definitely hold more virtual events in future, either completely online or potentially 'hybrid' events where some people meet up, but others join virtually.

Ben Lake MP, Chair of the APPG on Forestry and Tree Planting, said no-one could have imagined at Westminster in February that the next meeting would be held online. He noted the webinar was the first virtual gathering of the APPG in almost 50 years - but very unlikely to be the last!

RESOURCES

Links to all three webinars (and reports on them) are on the Confor Covid-19 hub home page:
www.confor.org.uk/covid-19/
If you have comments about Confor's future events, email Andy Leitch:
andy.leitch@confor.org.uk


STIHL

Nursery revival

Forest nurseries have continued to work tirelessly since lockdown in March, liaising closely with their clients and establishment contractors to get hundreds of thousands of trees lifted, graded and delivered out to the field for new woodland creation and restocking, all while social distancing and keeping safe. At the beginning of lockdown there were in the region of 35m trees in limbo.

The 11 Confor NPG nurseries across Scotland, Wales and England account for in excess of 90% of private sector plant supply in the UK, or in other words over a hundred million trees.

New growth popping through everywhere on this field maple seed bed banishing despair and strengthening the knowledge that there are better times ahead. Nursery sector back on its feet nursing an expensive headache but looking forwards
Picture: Trees Please

The nurseries themselves range in annual production size of one to over 25m plants per year. They also differ as to whether they grow bare root or cell grown stock, or both. They have been hit in different ways, not least with staffing numbers having reduced whether through the government furlough scheme or agencies.

What next for the sector?

With stock not moving as expected there have been impacts on space for transplanting seedlings, lining out, space in tunnels, sowing – this itself impacts on what work can be undertaken to ensure stock for future years supply. Think the relatives come to stay so everyone and everything moves rooms, but then they stay so nothing can go back to where it should be.

Confor has worked closely with NPG members and produced new safe working protocols "Forest Nursery Practices and Mitigation" demonstrating how work can be carried out safely, responsibly and in line with official guidance. This is available on the Confor website.

Nursery operations during lockdown

Early on in lockdown the practicalities of undertaking nursery work was in the spotlight:

- Grading sheds were re-configured
- Sowing for future seasons continued but at a reduced rate
- Lining out – an intensive activity normally carried out with five operators sitting on a trailer behind a tractor in a 3+2 formation – was reconfigured with reduced operators and screens.
- Getting staff to work had similar challenges across industries – a number of nurseries have household groups that work for them and this has certainly eased the logistics of travel and close working required at times.

Further work with Defra and Scottish Forestry in particular is looking at how to help nurseries move forward in the short and medium term likely through grant funding and innovation assistance.#

Looking ahead, the nurseries are largely back at work, not yet fully operational by any means, but working to these stricter protocols. They are adapting techniques to produce as many plants as they can in the coming seasons although species and provenance range and grading may be reduced. Prices are likely to be up as well due to higher operational costs.

In the spotlight
Christies of Fochabers

The Confor NPG were meant to have their summer meeting, alongside the HTA T&H Group up at Christies of Fochabers in June to help them celebrate 200 years in business. Ronald Christie, MD, gave the following thoughts:

- We have been in business, trading and growing trees for the past 200 years, throughout those times our company has survived the war years, market uncertainties and various other mountains to climb, those were difficult times to weather but with Covid19 lockdowns and restrictions hitting us hard in mid-March the next 200 days will certainly prove to be the most challenging that we have experienced.
- One positive outcome for us from all this is that although we have always worked closely with our staff, this lockdown has strengthened this bond further with the help and constructive involvement on social distancing , safety awareness and increased hygiene and housekeeping throughout the work place, with everyone showing increased and dedicated involvement in general welfare not only for themselves but for their fellow co-workers too, this will now be part of our daily life for the foreseeable future.
- We have become obsessed about plant health, let's draw breath and consider employers and management health for a change.

Grading shed at Christies (Fochabers) Ltd reconfigured with modifications made to partition workstations, clear one-way directions within sheds to ensure social distancing. Handwashing stations are more plentiful and clearly located as you enter and exit the grading shed. Picture: Christies (Fochabers) Ltd

Agility a key trait to succeed in crisis

A global pandemic cannot stop a determined **Daniel Iddon** from reaching his goal of running a tree nursery with a focus on innovation and market responsiveness.

It's just over a year since I set off on my new adventure as a small commercial woodland owner, bright eyed and bushy tailed. I had (dis)allusions on how I could somehow be part of a global timber supply chain and yet be local with low carbon initiatives, until I met an astute sawmill owner who put me straight. I've been grateful for that early exposure to the competitive industry and I have met a lot of knowledgable people who have helped me focus on what I can achieve. I started this year thinking the biggest impact to my ambitious plans for managing a small commercial woodland and starting a tree nursery in earnest was the two consecutive storms we had in January and February. Little did I know that Covid-19 would change our lives and society in a single swipe more than a typical decade just as we sowed our first seeds.

The Iddon family name has been synonymous with growing, breeding and showing rare hardy herbaceous cottage garden plants for three generations from nurseries in West Lancashire. Working with the public through open gardens, access to the working nursery and competing throughout the UK at RHS Flower Shows for over fifty years. The decision to rejuvenate the family business from growing plants to cell grown forestry tree saplings started two years ago with a vision of growing trees for my own woodland using the seeds collected from the select Sitka trees in the stand. Most people I met and shared this vision with (and to date) think I'm being too ambitious and/or naive and whilst they are probably right, I have thus far achieved that goal. The woodland is being managed with plans for a log cabin forestry building (using timber sourced from the woodland) and forest school to support outdoor education. As a family, we have collected seeds, grown and planted trees in the woodland generating great memories along the way.

The nursery has ramped up production after trials and starting to take shape as we navigate a new way of living. We are a relatively small nursery (with a capacity for 1M cell trees) compared to the larger established industry players but I believe that allows us to be more agile and challenge the way we use our nursery, resources and knowledge to develop new techniques and challenge the norm.

Variables

We have spent the last two years working within FRM and UKISG guidelines collecting seeds, developing growing techniques and researching the growing cycle variables to be more efficient to try and meet our customer needs. I'm certain that a lot of what we are trying to achieve has been tried before but I also feel that means we can keep trying as it has yet to be done working without the confines of a deadline to make the immediate savings or growth in profit. One initiative under way is to grow UK-sourced orchard Sitka spruce suitable for planting within a year. Given the right growing conditions our ambition is to meet the ever changing demand of species and provenance to suit market conditions and grow and meet customer demand within that planting year.

Working with foresters and customers in England, Wales and Scotland I have learnt that they each look for something different and trying to solve their problems has helped me focus on what customers ultimately want (rather than just healthy plants as we would typically want). The nursery was empty and without the pressure of contracts to deliver against we have had time to trial a lot of variables, including growing medium - from peat free to a reduced peat mix using wood products. We developed our medium to suit paper cells to help reduce single use plastics, waste and time/labour handling cells during on site planting operations.

I only hope I've found my niche and place within the sector so I can continue to learn, develop and contribute to a more sustainable future for our children. If you are looking for a nursery to meet your species needs, quantities and provenance for the forthcoming planting season please get in contact to find out how we can help.

www.safwoodland.management

Estate back to work after lockdown

The Grosvenor Estate's investments in local timber supply for heat and a future sawmill have allowed the business to weather the crisis.

Since the government announced lockdown on 23 March, Grosvenor Estate's Forestry and Conservation Team has only undertaken essential operations. These included an ongoing project at Eaton Estate to deal with Acute Oak Decline (AOD), which needed to be completed by the start of May, and running the biomass and firewood operations which benefit elderly and vulnerable people in our communities.

On 14 May, the team returned to work in pretty much full capacity. This followed government advice that those who cannot work from home should return to work. A lot of work was done to ensure people returned to work safely (Standard Operating Procedures, Risk Assessments and Tool Box Talks) and this continues.

The Forestry and Conservation Team works across Grosvenor Estate's UK rural estates in England, Scotland and Wales. Forestry is a large part of what we do but we also undertake arboriculture, manage parkland with associated paddocks and undertake landscape work.

Throughout the lockdown period, the estate kept contractors in employment where possible but only where they were happy to continue to do so; in some cases, bringing forward work so they could maintain their livelihoods.

Greg Vickers, Head of Forestry, said: "It's really important to work with contractors and help them out when we can – they often bend over backwards for us and we must be willing to do the same. During lockdown we got a lot of forestry work done – the weather really helped. Where we suffered was in the more public facing work such as the management of green spaces in our villages and our arboricultural work. We made a commitment some time ago to self-supply biomass boilers and we also run firewood businesses. During difficult times people still need heat – perhaps not quite so much during the past few weeks with the good weather – but we still had on outlet for our timber. We have invested in an estate sawmill to produce timber for our own needs and for sale. This isn't due to come online until the end of the year. Had we been operational I think we would have had a difficult time – I can't imagine many people were buying timber – although perhaps the DIY market may have been buoyant with everyone at home.

"Looking back on the past two months, but also looking forward, I think our investments in local timber supply for heat and in our future sawmill have been the right move. I'd be interested to hear how local sawmills have fared, but I expect those that supply local will have done better. As we move forward, I will be looking to strengthen our local supply chain. I feel people want to buy local and want to buy sustainably".

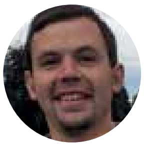
www.grosvenorestate.com

A project to control the spread of AOD was deemed essential and work continued

CONFOR WELCOMES NEW MEMBERS

Patrick Porteous MICFOR, Midlothian
Coillear Forestry Ltd, Inverness-shire
Elsoms Seeds Ltd, Lincolnshire
GSI, Midlothian
Knight Frank, Westminster
Laurence Crow Limited, Surrey
XCUT Logging Limited, EIRE

Crisis aggravating tree supply challenge



Richard Wall
RW Forestry

During these uncertain times we have adapted to working throughout the Coronavirus lockdown and have put strict measures in place to ensure everyone's safety. We are lucky to work in an industry were 90% of the time we social distance anyways - it's the nature of the job. But we made some changes to the way we operate to ensure that social distancing is possible at all times. Travelling in separate vehicles, making handwashing facilities and antibacterial wipes available, and making the extra effort to always keep the safety distance of two metres from each other.

I've been lucky to keep most of my planters going during the lock down with only two planters unable to work for personal reasons. I've had a squad join me that had been working on a contract for FLS but went out of work as FLS stopped all tree planting operations. It was a win-win, as I was able to offer them work to finish their season while they filled in the resource gaps left by the planters I lost due to the lock down.

Tree supply

Our biggest interruption was when a few of the tree nurseries closed down after the lockdown was announced, leaving us without planting stock for some of our sites; luckily, most of our trees come from nurseries that stayed open, so the impact on our operations was not too big.

Tree supply is in general an uncertainty and one of the key factors influencing whether or not we meet planting targets; the Covid-19 crisis will aggravate this. With the tree nurseries down to less staff during this time its only going to have a knock-on affect in the future. Meeting Government's increased planting targets will become unrealistic without the required tree supply. We seriously need to look into this if we are wanting to achieve planting targets.

Labour

Depending on how long travel restrictions will last, we might struggle for labour next season. I don't know the percentage of trees that are put in the ground by foreign planters that come to the UK especifically to plant trees solely; but my rough guess is that Europeans and Canadians will plant at least 40% of the trees in the UK. I'm involved with Gone West and the Princes Trust to start a training program for people that are looking for employment to have proper onsite training so they can come away with the experience and the qualifications they need to work withing the tree planting sector and hopefully can fill the gap if we need more labour in future.

Planters for RW Forestry at Glenwargen

EU forest and wood sectors unite for place in recovery plan

The European forest-based industry 'ecosystem' – including farming, bioenergy, furniture and graphic sectors – has come together to push for inclusion in the European Recovery plan

In light of the European Commission's expected announcement of which business ecosystems will be targeted by the European Recovery Plan and new Industrial Strategy for Europe, the partners of the forest-based sector (see panel) have sent a proposal to EU Commissioner for Internal Market Thierry Breton to include the European Forest-based Industries Ecosystem as one of the ecosystems eligible for support in the plan, the European Federation of Woodworking Industries (CEI-Bois) reported on 15 May.

The sector counts more than 420,000 enterprises (20% of the total EU manufacturing sector), 3.5 million of direct employees (10% of the total workforce in manufacture) and generates an annual turnover of 520 billion euros, 3% of the EU GDP.

"As key pillars in our common European resilience, we are sourced, manufactured, reused and recycled in Europe unlike any other ecosystem and based on European innovations and technology. One in five manufacturing companies in the EU belongs to the forest-based industries ecosystem and offers an important amount of jobs well distributed over all countries and regions and in particular in rural areas. We are also a fertile ecosystem for digital services and applications. We generate a significant export income to the European economy", commented Beatrice Klose, Secretary General of Intergraf.

Like most of the EU industries, the sector has been severely hit by the shock caused by the Covid-19 health crisis: the decline in domestic and foreign demand, the interruption of the supply chains and logistic problems took their toll on our industries, which expects on average 20% turnover loss in 2020; some parts of the ecosystem are more seriously hit than others. Nonetheless, the forest-based industries ecosystem is in a unique position to recover by moving forward, doing so in a way that is in line with the objectives of the EU Green Deal. Linked to most other ecosystems, it would also help other parts ofthe EU economy to bounce forward.

"Including theforest-based industries ecosystem in the European Recovery Plan would be a healthy injection of green and resilience into all other ecosystems as we are linked to renewable energy, textiles, construction, food and agriculture, low carbon manufacturing, green chemicals, health and hygiene, pharmaceuticals and key packaging solutions. Recent announcements of large investments in biorefineries by our member companies are an example of how this ecosystem can bring new life to old fossil-based sectors with renewable materials that are sustainably sourced in Europe", said Jori Ringman, Director General of Cepi.


SHUTTERSTOCK

The paper and printing industries are part of the wider 'ecosystem of forest-based industries'.

THE CO-SIGNATORIES

The co-signatories, listed below, ask that the forthcoming EU European Recovery Plan and New Industrial Strategy for Europe give a dedicated space and recognition to the Forest-based industries ecosystem.

European State Forest Association (EUSTAFOR) **eustafor.eu/**

FECOF – European Federation of organizations representing forest municipalities **www.fecof.eu**

Forest-based Sector Technology Platform **www.forestplatform.org**

Confederation of European Forest Owners (CEPF) **www.cepf-eu.org**

Committee of Professional Agricultural Organisations-General Confederation of Agricultural Cooperatives **copa-cogeca.eu**

The European Confederation of Woodworking Industries (CEI-Bois) **www.cei-bois.org**

European Panel Federation **europanels.org**

Cepi **cepi.org**

Intergraf **www.intergraf.eu**

European Furniture Industries Confederation **www.efic.eu**

Bioenergy Europe **bioenergyeurope.org/**

Covid-19 – Euroforest's story

Graeme Ralph,
Euroforest, 18 May 2020

It started with a flurry of text and WhatsApp messages from astonished staff and harvesting and haulage contractors immediately following the Prime Minister's lockdown announcement in March, all wanting to know what it meant for them. It shouldn't have been a shock, as we had already told all field managers the previous week to no longer attend the offices and work from home in an attempt to avoid unnecessary contact and potential disease spread within the organisation. Yet to be honest, we were all trying to process the effect it was likely to have on our business and our families and didn't have all the answers by a long way.

What followed the next day was the first of many video conference calls between the directors where we agreed unanimously that our primary aim was to protect our business, and in particular, our staff, so that we all came out the other end as strong as possible and able to re-build quickly. Next day the first video call with all staff on a regional basis took place advising them that, apart from the need to observe social distancing and personal hygiene, it was business as usual and that we intended to be as resilient as we could.

These calls have become weekly events, and are likely to remain part of the calendar as a way of updating everyone, wherever they are, on what is happening, but more importantly, that they are part of a team all working for the same goal, even though they may not see any of their colleagues in the flesh for quite some time. We quickly circulated what was later to be defined as key worker letters to all staff and contractors so that they were all able to continue to work as normally as possible, and have continued to support all our staff to the best of our abilities throughout.

At the end of the day, however, our business is about selling wood, so it was vital for us that customers remained open for deliveries. For at least the first month of shutdown this was such a moveable feast. Some customers have remained open throughout, producing pallet wood, biomass for heat and electricity – and to those that have managed to keep open a great big thank you from us and our suppliers, while others not producing key products were forced to close.

Infrastructure

Overall, we have managed to maintain our activity at around 70% of normal, so although not profitable, we have managed to retain all staff, and most harvesting and haulage infrastructure. It has been tremendously challenging – delivery quotas; customers open one week and closed the next for reasons completely out of their control; social and media pressures on staff , customers and contractors; overzealous police stopping lorries, staff, contractors – you name it and we have had to deal with it!

Confor have been instrumental in supporting us by providing regular updates, documentation and support across the industry. Our suppliers have been equally instrumental by responding to the market information they received; we quickly realised that whilst sawlogs were not going to move quickly due to the massive slow-down in the building industry, pallet, packaging and biomass supplies were going to be in demand. Thankfully, suppliers across the spectrum, but with particular mention for Gresham House and state forestry have been so supportive in terms of bringing suitable sales forward to provide these products at a time of need, and to them goes out another massive thank you.

We do still have challenges ahead. How quickly will the demand for wood and wood products return to normal? How long will it take for civil engineering to gear up again and start forest road and access building? How quickly will utilities re-start power outages and catch up on the backlog that has already built up? Will we still have the same harvesting and haulage capacity available? All of these questions, and many more will be answered in due course, but the most important thing is that our industry survives, is resilient, and is ready to face these challenges together.

Confor survey on Covid-19 impact on small businesses in Scotland's supply chain

On behalf of the Scottish Forest and Timber Technologies Industry Leadership Group (ILG), Confor, in collaboration with FCA, surveyed small businesses/self-employed across Scotland's wood supply chain on the impact of the Covid-19 lockdown on their business and their experiences of accessing associated support measures.

The main purpose of the survey was to help inform the public sector agencies who are partners within the ILG of:

- The uptake in the Government's Covid-19 support by small businesses in the sector.
- Identify any gaps in Government support for self-employed and small businesses in the sector now and during the recovery phase after lockdown.
- Identify the need for support for dealing with Covid-19 restrictions such as social distancing for restarting work.

We received 121 responses from small businesses, covering a wide range of forestry and timber related work and located throughout Scotland.

The results of the survey will be used by the public sector agencies and industry representatives to explore if and where additional support can be implemented. A fuller summary of the report will be made available through Confor in the coming days. Those involved in commissioning the survey, particularly Confor and the FCA, would like to thank all those who took time to respond.

KEY SURVEY RESULTS

- Level of operations: Three-quarters of businesses were still operating as of 18 May. While relatively few staff have been furloughed, only just over 10% are operating at full capacity.
- Use of financial support: Three quarters of businesses had accessed some government support mechanisms and the majority found this a straightforward process.
- Gaps in support which were mentioned included: support for businesses without commercial premises, the option to part-furlough, support for running costs other than salaries, support for costs of PPE, inadequate payment holidays on machinery, the loss of productivity causing reduced output even when working at full stretch, and lack of proactive support to open markets and businesses within social distancing guidelines.
- Key risks: Cash flow and market demand were the stand-out risks to businesses in the short and longer term.
- Additional support needs: Main areas identified where additional support for preparing for and dealing with the restart phase would be welcome:
  - Need clear concise guidance from industry, endorsed by government, on dealing with safe working within Covid-19 restrictions, ideally these would be supported by case studies.
  - Support for accessing and procuring appropriate PPE.
  - Support to ensure accommodation is available for contract bade when restart begins.
  - Clear and timely ongoing communication from contract managers on when and how restart can commence to ensure operations can re-commence as soon as possible.

Forestry machinery during Covid-19 – a view from Komatsu Forest

Per Annemalm

When COVID-19 hit Europe, Komatsu Forest was affected by the closure of suppliers of critical components, our factory producing the red Komatsu Forest machines has therefor been on a temporary shutdown for a couple of weeks. The production has started gradually after just a few weeks shutdown, and ramping of the production will work well as long as our suppliers are not too badly affected by the restrictions around in Europe.

Here in Komatsu Forest Ltd, the local British distributor, we have adapted to the new situation pretty well. It meant a lot for us that the British forest industry was declared an essential business, so we could continue running the business as part of the supply chain.

We have of course taken precautions to safeguard the health of our staff. We have for example had a few office staff working from home, our Parts collection has been from Drop boxes outside of the Parts store, and sanitary routines have been changed. It was our intention to offer technical support to machine owners despite the restrictions, and I think we have managed both supply of Spare Parts and Technical phone support well. The challenge is of course any work which is related to travelling and accommodation since almost all hotels have been closed, so those activities have been rescheduled for a period. Work is ongoing to prepare for a new reality, where we can do business as close to normal as possible and still comply with post-lockdown workplace rules.

It is too early to say how much effect the situation has on the market. We are still doing business. A lot of the wood consuming industry is running and need wood. We will maintain our part of the supply chain. Komatsu Forest commitment is long term. We even reinforce that commitment with a new product range this year, and a completely new factory for producing the machines in Umeå, Sweden, next year.

Production returns after a temporary shutdown at the Komatsu factory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Big wheels keep on turning...

Roland Stiven
Timber Transport Forum

A long, long time ago..., in the middle of March, we were wondering whether to postpone the Timber Transport Conference [Note: it was postponed], and there were rumours London might go into lockdown. Soon after, much of the country ground to a halt. Freight haulage was immediately identified as key work and Confor quickly engaged with governments to demonstrate that at least some timber supply chains were essential to keep us with power, paper, pallets and fencing.

Demand for roundwood seems to have been patchy as mills scaled back, closed, re-opened and tried to manage their workforce and various stocks. While the supply chain has been operating below normal capacity in recent weeks, hopefully this will pick up as construction in England begins to re-start.

For timber hauliers, the realisation of a nostalgic dream of dry weather, (slightly) relaxed driving time rules, cheap diesel and 1950s levels of road traffic was severely offset by reduced and fluctuating demand, furloughed drivers and, for flat -bed lorries, a lack of back loads for long journeys. Socially distant at the best of times, timber hauliers have had to quickly adapt to Covid-safe working practices. FISA has responded promptly with a Safety Bulletin Keeping HGV drivers Safe and is urging vigilance in this regard as supply chains continue to open up.

In Scotland, the lockdown failed to interrupt the processing of the Strategic Timber Transport Scheme. Applications for funding for road improvements and modal shift were assessed in an all-day Zoom panel meeting. Derek Nelson of Scottish Forestry put in a stalwart shift in his last hours before retirement to make it run smoothly. Much of the programme is for improvements to council roads. The Scottish Government has confirmed that the full £7m budget can be allocated and councils are hopeful that both the co-finance and the contractor capacity can but found to deliver the works. If it can, the funding will be a welcome boost to the rural economy.

While the roads are relatively empty, it does mean that timber lorries stand out even more, and there is no shortage of people keen to point out inappropriate behaviour. So, please continue to consult with councils and communities where required, strap up loads safely, drive carefully and follow good practice.

A biomass sector in the 'reshaping'

Neil Harrison

Like every other part of the forestry sector, biomass supply chains have also felt the impact of Covid-19, although generally speaking, biomass businesses have managed to keep the fuel flowing. As lockdown followed Europe's warmest winter since records began, and the fifth warmest on record in the UK, stocks were generally high of both chip and pellet, and widespread shortages were avoided. The closure of schools, leisure centres and hotels - big markets for biomass fuels in many parts of the country - have also played a part in ensuring pressure on supply chains was mitigated, albeit by luck rather than design.

As lockdown begins to ease, and some sort of 'new normal' begins to emerge, most observers expect biomass supply chains to adopt their previous shape as the year progresses, although the end of the RHI is likely to drive significant new demand over winter 2020/21, as new installations rush to complete before the scheme closes to new entrants on 31 March 2021. While this will certainly lead to a net increase in demand, particularly for chip, there will inevitably be some displacement, as material that would otherwise have found its way to one of the many chip drying plants that has closed over the past year or so, looks for a new home. The steady closure of chip drying plants is a trend which has been observed over the last couple of years, as significant overcapacity, lack of a genuine markets for much of the output, and the overpromised economic case of the original proposition have all taken a toll.

Like many, working exclusively from home for weeks on end has afforded me some time to reflect not only on what the future might hold for my particular slice of the forestry sector, but also on the journey that's brought us to this point. With a major policy change for renewable heat – and biomass in particular – just signalled by government in their Future Support for Low Carbon Heat consultation (**www.gov.uk/government/consultations/future-support-for-low-carbon-heat**), now

A boiler running on wood pellets heats the warehouse of department store Barkers of Northallerton .

seems like as good a time as ever to look forward while hopefully applying the lessons of the past.

What has shaped our current biomass market?

In the early noughties, when running a forestry extension programme in northeast England for the FC, one of our key workstreams was driven by their long-standing target to bring neglected woodland into management. This sat alongside providing business support and training to forestry contractors, sawmillers and the like, and generally trying to support and stimulate the regions' forestry industry in any way possible. With timber prices at historic lows, and an almost complete lack of competition for lower grade timber in the region, the use of wood in biomass boilers was seen as a potentially important new market.

However, it was nearly a decade until any meaningful demand began to appear for woodfuel, as only limited numbers of boilers were coming on line each year. A lack of coordinated support for the technology, combined with low fossil fuel prices – levels similar to those we see at present – meant that only projects driven by 'sticks', such as PFI school contracts, were appearing on the ground, and there was insufficient critical mass to spur investment in the supply chain. We developed and delivered any number of forest-centric initiatives – farmer engagement and training, producer groups and the Ignite woodfuel training programme for example, all with the aim of bringing more woodland into productive use.

Although it was slow to start, the arrival of the Renewable Heat Incentive in November 2011 began to deliver what tens of thousands of hours of time spent on forestry extension and support projects had struggled to - the long-anticipated biomass heat market and multiple local demand points for the product of undermanaged woodlands. Since its introduction, the RHI has doubled the UK demand for woodfuel by delivering over new 17,000 new installations - each one of which presents a direct or indirect market opportunity, providing competition for a raw material which previously may have had only one, or even no local market, and in doing so has supported a steady increase in timber prices; job creation in rural areas; decarbonisation and general activity across the forestry sector.

CASE STUDY

The Ncn'ean distillery on the Morvern Peninsula (www.ncnean.com) uses woodchip from the surrounding estate (the low grade part of their commercial softwood operation) to raise steam for whisky production. This is a real exemplar of what biomass can deliver – local jobs, locally-sourced energy and a local market for low grade forestry material that otherwise wouldn't be economic to put to a market. Below: The distillery boiler and, right, an aerial view of the distillery.

How will the biomass sector be supported post RHI?

While we're still some way away from seeing biomass reach anything like its market potential in the UK, the RHI has clearly made a significant contribution to establishing the technology and its supply chains as a vital part of the modern forestry

>>

Changes to the existing RHI schemes

The domestic RHI has an extension until 31 March 2022, but the non-domestic RHI will come to an end on 31 March 2021, meaning support for the sorts of schemes which have characterised biomass market growth since 2011 will cease. For larger schemes – over 1MW in size – a 12 month extension is planned to the non-domestic RHI using the tariff guarantee scheme. All projects using the tariff guarantee extension route must be commissioned by 31 March 2022.

Clean Heat Grant

The successor scheme planned for the domestic RHI – the Clean Heat Grant scheme will support biomass projects in limited applications with a £4,000 capital grant, while the picture for small and medium-scale commercial projects remains unclear, as they fall outside of the scope of the Industrial Energy Transformation Fund – the scheme intended to drive the decarbonisation of UK industry, including heat. Rather than a flat scheme which can be accessed by all parts of the economy as exists at present, support for renewable heat is being fragmented and spread across a range of different grant programmes.

>> sector. So, with a solid foundation to build on, almost 10 years of playing legislative whack-a-mole to iron out the kinks and unintended consequences of the RHI, and wood heat sectors across Europe seeing renewed government support and focus, what can we expect to succeed the RHI?

Well as it's still only a consultation, it's hard to say with absolute certainty what future support for low carbon heat will look like exactly, and therefore what it will mean for the forestry sector, but there are enough general themes in the consultation documents to give significant cause for alarm.

The most important issues are the targeting and levels of support of the proposed new schemes. The exclusion of any new project above 45kW for the Clean Heat Grant - a regression to the type of system which stymied growth before the RHI was introduced - coupled with the general presumption against biomass in all but "limited circumstances", means that market growth as a result of this scheme is likely to be little more than the replacement-rate (ie 20-40 a month) that has characterised the domestic RHI since 2016. Pellet projects will dominate, as <45kW is simply too small for woodchip to be economic in the majority of circumstances, particularly given the grant could be set as low as £4000 per installation.

For the larger projects which deliver the most renewable heat per £ invested, these will need to find their way through the new Industrial Energy Transformation Fund – a competitive grant programme which only addresses certain sectors of the economy, specifically those with SIC codes in the range 10-33. This is mainly manufacturing activity, in which sawmilling is thankfully included. Applying the same SIC codes to the 17,000 non-domestic RHI schemes delivered to date would have excluded over 90% of existing installations, meaning a substantial number of schemes, and therefore potential market, will be excluded from future support.

The RHI mechanism has undoubtedly delivered a step-change in the deployment of renewable heat and contributed to positive changes across the forestry sector. With a return to the grant-based schemes that characterised the stop-start nature of the sector previously, the near future will see growth in biomass markets becoming sporadic at best, while further consolidation across the supply chain will become inevitable, and business and skills loss will continue across the installation side of the industry. All of which will make the challenge of decarbonisation harder to meet when we come full circle once again, and like our cousins on the continent continue to do, we back biomass.

Neil Harrison is a director of re:heat, chairman of the Wood Heat Forum of the REA and a member of Confor's North of England Committee

Drax launches biomass carbon calculator

In May, Drax launched the Biomass Carbon Calculator – a new tool to more accurately measure supply chain emissions, enabling the industry to identify where emissions can be reduced and make a greater contribution to tackling climate change.

Drax is seeking views from a wide range of experts, including academics, non-governmental organisations and the biomass-for-energy industry, in a consultation running until June 12 on the Biomass Carbon Calculator to ensure the methodology is as accurate and transparent as possible so it is more effective.

Drax Group's head of climate change, Rebecca Heaton said: "Drax announced a world-leading ambition to become carbon negative by 2030 by pioneering the groundbreaking negative emissions technology, bioenergy with carbon capture and storage (BECCS). As part of this commitment to support the UK's net zero target, Drax is also ensuring that the supply chain for the sustainable biomass pellets we use to generate renewable electricity is as low carbon as possible.

"To do that, it's vital that Drax and the biomass industry has the clearest picture of emissions in the production and transportation of the pellets, by using actual supply chain data to help raise the quality of carbon accounting for biomass. That's why we've called on academics, scientists, regulators and non-governmental organisations, as well as those in the biomass industry, to participate in the consultation to help further improve the modelling for this new calculator and create a higher industry standard for emissions reporting."

Drax's Biomass Carbon Calculator has already been independently reviewed against the greenhouse gas calculation methodology in the Renewables Obligation, one of the UK's main support mechanisms for renewable electricity projects. The review also verified the calculator complied with the EU's Renewable Energy Directive II.

The calculator is one of several Drax initiatives to develop world-leading policies and tools to create greater clarity and transparency across the biomass industry.

Funding for greenhouse gas removal demonstration projects

In 2018, Confor welcomed the report by the Royal Society and Royal Academy of Engineering which highlighted the potential for greenhouse gas removal (GGR) of growing forests, building with wood, and wood-based technologies like biochar and bioenergy with carbon capture and storage.

Now, funding is being provided to develop demonstration projects which deliver GGR. The National Environment Research Council (NERC) are developing a Directorate Hub for GGR demonstrators which will co-ordinate projects with business and research institutions, including commissioning small grants. **https://nerc.ukri.org/research/funded/programmes/ggrd/news/ao-ggrd-dhub/**

- In addition, the Biotechnology and Biological Sciences Research Council is calling for research proposals for large-scale GGR. **https://bbsrc.ukri.org/funding/filter/2019-greenhouse-gas-removal-demonstrators/**

PALMS

Timber trailers and cranes supplied by Riko UK.

Europe's largest manufacturer of forestry trailers & cranes.
That is quite a claim and some might question it, but if we are talking about trailers & cranes that are truly made in the EU, rather than in a far east suppliers' factory, then it is pretty sure that with over 25,000 cranes and 23,000 trailers produced, Palms probably does comes out on top.

With a family manufacturing history going back many years, co-founder Mr Anti Puusepp started the company Palmse Mehaanikakoda LLC in 1995 to produce forestry trailers and cranes. PALMS is founded on 4 core values: • Passion for building the best equipment. • Innovation to make forestry easier for our customers. • Uncompromising product quality. • Value of long-lasting customer relationships. The factory is over now over 9000 square meters and the 63 staff created a 2019 turnover of €28.6 Million.

The success of Palms is further backed up by the passion and commitment to using European materials. Such as STRENX steel from the renowned Swedish company SSAB. This steel is specifically manufactured to stand the stresses and strains exerted on trailers and cranes. And is why Palms come with a 3-year warranty on the trailer frame and the crane 'Kingpost' and booms. A 3-stage treatment and painting process ensures the product looks good its whole life.

Palms trailer range now cover single beam, ladder chassis and 'forwarder' chassis with a gross capacity from 8 to 18 tons. Many of the trailer are available with driven wheels with either Black Bruin hydraulic wheel motors, that can provide 2wd or 4wd or the traditional Hydraulic 'cage drive' 4wd. Palms is one of the few manufactures producing 4wd trailers using 'forwarder style' axles. Here there is a choice of mechanical drive using the tractors 'ground speed' PTO drive, or a variable flow hydraulic motor in the trailer chassis that is powered by the tractor PTO and uses sensors to match the trailer speed to the tractor speed.

Palms cranes come in 5 categories to suit the semi-professional to fully professional customers. Maximum reaches vary from 5.4 to 9.4 meters with a wide range of hydraulic control valves and choices of control levers, pilot operated mini joysticks and even full radio remote. Valves can be set up for open centre, closed centre or load sensing.

It is fair to say that Palms should have a trailer and crane combination to suit every user.

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Habitat restoration through large-scale woodland creation

Anthony Ellotson describes the development of a commercial forestry scheme into something more than rewilding

What started as an estate diversification plan to plant a couple of hundred acres of commercial woodland turned into a completely different, larger and more complex project. The Strath Carnaig Woodland Creation Scheme has resulted in EIA consent for the planting of 1095 hectares, much of it within a Special Protection Area (SPA).

Cambusmore lies midway between Dornoch and Golspie. The estate is bisected by the A9 Inverness Thurso road, with open hill predominating to the west and good stock and arable land to the east and south of Loch Fleet at The Mound.

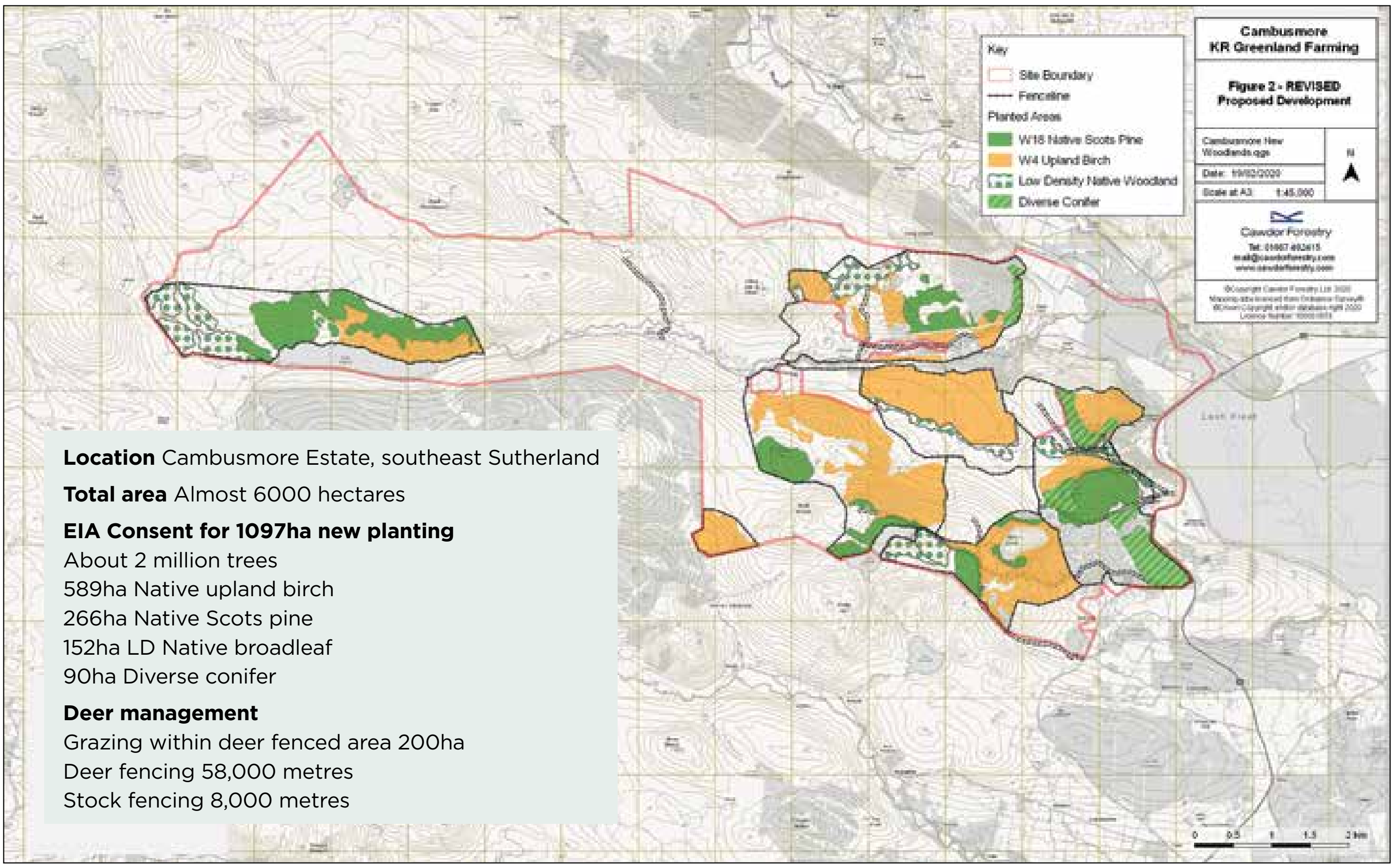
Ken Greenland, the estate owner, was looking not only for possible additional income streams but also to consolidate the move from a sporting estate to a farming and conservation operation. Forestry Commission Scotland (as then was) were contacted in early 2017 to establish whether they would look favourably on a planting scheme. We were further encouraged to consider a much larger and more ambitious proposal. This fitted very well with Ken's wish to see the hill ground enhanced and to bring more wildlife back. Hill management has proven difficult with a very short heather burning window of opportunity, often only a couple of weeks. This was compounded by a fire a few years ago which spread out of control from a neighbour and burnt about 2000ha at Cambusmore.

What was put forward for a Screening Opinion amounted to a little over 3000ha, after taking out all the areas of deep peat and other unplantable ground together with those areas which could be used as pastures for the hill flock and summer grazing for the cattle.

This gave us a base from which to work knowing that we would inevitably be scaled back as we collected historic hen harrier breeding data and prepared the EIA under the Forestry (Environmental Impact Assessment) (Scotland) Regulations 2017. Much of the area identified as being suitable for planting lies within a hen harrier SPA. This created a considerable problem but one which we were able to work around.

Tremendous team

We have been fortunate in that we have had a tremendous team from the start. Felix Karthaus set us down the path with his first outline of what was plantable. In preparing the EIA



Location Cambusmore Estate, southeast Sutherland

Total area Almost 6000 hectares

EIA Consent for 1097ha new planting
About 2 million trees
589ha Native upland birch
266ha Native Scots pine
152ha LD Native broadleaf
90ha Diverse conifer

Deer management
Grazing within deer fenced area 200ha
Deer fencing 58,000 metres
Stock fencing 8,000 metres

we have drawn together a small team pretty much all drawn from the far north covering a wide range of disciplines including: Andy Kennedy who helps us with soils (and is a great GIS tutor) and more recently Steve Connolly and Sarah Toulson at Cawdor Forestry, whose experience has been invaluable.

Unsurprisingly SNH and RSPB had concerns about hen harriers in a woodland environment. Sadly, Paul Haworth (the acknowledged woodland hen harrier expert) died not long after we had started talking to him; however we were fortunate that our friends at ATMOS Consulting were able to step into the breach.

One of the biggest challenges we faced was in having to deal with the Birds Directive, which highlighted problems that can arise from focusing on a single species (hen harrier).

By concentrating on a single species it becomes all too easy to take one's eye off the bigger picture and remember that all these creatures on the hill are interdependent. By planting the right types of trees to suit the varying ground conditions we are trying to meet that objective. One of the joys of Cambusmore is the huge variety of wildlife.

All planting within the SPA will be of native species and the general planting design is seeking to recreate as natural a woodland landscape as practicable with birch, Scots pine, willow, rowan and a variety of other trees and shrubs which will support prey species and add to the diversity on the hill, as well as protecting key hen harrier areas.

The majority of the planting will be at low densities with large open ground areas which will continue to afford hen harriers nesting and foraging habitat. In total we are looking at planting almost two million trees over the next couple of planting seasons.

Historic pastures

Large mammals present their own problems. Three species of deer are present, not in huge numbers but sufficient to do untold damage, which has led us to incorporate a fence design which will permit a relatively free movement of deer to the four points of the compass. At the same time, with support from Scottish Forestry, we have been encouraged to retain a number of historic pastures within the deer fenced area which will incorporate habitat for waders and other woodland margin birds.

In putting this scheme together, we have looked at other schemes, and Ken wants to get away from the idea of rewilding in favour of actively managed habitat restoration; we want to see as great a variety of wildlife as possible, even if it does mean having deer fencing for a limited time.

There is an area incorporated within the scheme which lies outwith the SPA, which will be planted so as to afford some future income generation as well as, hopefully, being tailored to what local processors will need in the future (Norbord and pine). The aim is to incorporate a crop which is climate resilient and adaptable to change which is likely to provide and support local employment opportunities in the future and provide an economic basis for ongoing management of the SPA.

Medieval settlement

Though we are a long way from large population centres, we are extremely fortunate in being able work with HistoryLinks in Dornoch who have an archaeological programme ongoing with a local school on the site of a medieval settlement within one of the identified pasture areas as well. There is also interest from a civil engineering historical society in restoring one of the earliest Victorian salmon ladders at Torboll.

In an effort to minimise our footprint we will not be creating any new roading but will rely on a network of existing tracks.

To allay concerns about the management of unplanted areas and to meet the concerns of SNH arising from their Natura 2000 assessment a Habitat Management Plan will be entered into along with regular monitoring of a number of key indicators.

We believe that this scheme will bring landscape scale wildlife benefits to Strath Carnaig ,as well as making a small contribution to climate change mitigation through carbon sequestration.

Ken Greenland and I are extremely grateful to all those who helped bring this scheme to the point where we can move forward to the final and detailed planning stage including Scottish Forestry, Highland Conservancy, for their support, SNH for their hard work in reconciling our objectives with unduly prescriptive legislation and all those whose hard work has resulted in EIA consent being granted.

Mixed messages

TIMBER AUCTIONS MARKET REPORT
Oliver Combe
Timber Auctions

It is early May, the sun is shining, the land is dry again and we have had a glorious spring but our world has been darkened sadly by the global Covid 19 pandemic. The lockdown has been imposed in the peak of the spring market causing significant disruption to demand whilst in most areas the supply side has been able to keep going leading to high forest stocks but lower stocks further up the supply chain.

Whilst there are signs of price improvements in the US sawn timber market there is an oversupply of timber currently in Europe and Scandinavia.

The UK scene

Prior to the Covid19 outbreak the chancellor's spring budget presented a positive outlook for the UK timber market, we wait to see how delivery of this budget package will be influenced by the cost of supporting the economy through the lockdown.

Covid has pushed most economies into recession and a global slowdown is forecast to last until 2021 and cost the global economy around £7 trillion. The UK Government has signalled that it will significantly increase borrowing to fund support but may well have to look carefully at postponing some of its major infrastructure commitments from the budget until tax revenues pick up post slowdown

UK Government policies will influence demand levels in the short term but the key influence on price is exchange rates and supply levels. Exchange rates had settled following the Brexit decision and allowed a period of stability, the recent disruption to prices had come from sudden increases in suppliers of beetle damaged timber from central Europe. For the near future the clearance of beetle damaged timber will continue to influence the UK market but we should also watch carefully the German Constitutional Courts ongoing spat with the European Central Bank over the Quantitative easing and its impact on the value of the Euro.

The forestry and timber products industry has seen varied impacts from Covid depending on sector and markets.

Softwoods

The panel sector (chipboard and MDF) has borne the brunt of the pain in the UK with widespread mill closures, little or no demand for finished product during the Covid outbreak and serious pressure on prices from cheap European board. As they gradually reopen and wind up production levels their minds will be increasingly focused on reducing costs so they can effectively compete in the market.

With full round wood stock yards, improving availability of sawmill co-products and the seasonal reduction in biomass demand round prices will inevitably come under scrutiny.

The main carcassing sawmills have shared the pain with the board producers as they operate in very similar markets. They were already under price pressure prior to the outbreak which removed then demand overnight as merchants and end user businesses were shutdown. These mills are now slowly coming back on stream with single shifts initially and now some moving onto double shifts.

So demand for raw material is slowly picking up again but there are very high stocks of spruce logs in the forest and considerable uncertainty over future demand levels.

The sudden closure of carcassing mills removed a large supply of sawmills co-products from the biomass market and forced them to look for small round wood to fill gaps in their supply inventories.

The biomass market has held up well and initially provided a boost to the market as biomass processors sought small round wood to replace reduced availability of sawmill co-products.

Now with full yards and very, very low oil prices end users are bound to start to look at the cost of wood fuel. The low oil prices

£ per tonne delivered to customers in Wales, central and south England (May 2020)

Product	*Lower price*	*Upper price*	*Trend*
Log 18	£65.00	£70.00	=
Bar 14	£63.00	£68.00	=
SRW	£53.00	£58.00	=
Fencing	£60.00	£65.00	=
H Wood firewood	£60.00	£65.00	=

£ per tonne delivered to customers in north England and Scotland (May 2020)

Product	*Lower price*	*Upper price*	*Trend*
Log 16	£65.00	£75.00	=
Bar / pallet 14	£60.00	£65.00	=
SRW	£55.00	£60.00	=
Fencing	£60.00	£65.00	=
H Wood firewood	£55.00	£65.00	=

THE GLOBAL SCENE

The pandemic has impacted across the world and whilst Asia and Europe are beginning to come out of lockdown the situation remains very serious in the Americas and in particular in some parts of the USA, Mexico and Brazil.

As global trade moves into the recovery phase it is becoming evident that the impact has been very varied with some real hot-spots and large areas with limited impact where after the initial shock business started to resume fairly promptly but at a lower level than previously.

Whilst Europe and Scandinavia have very high round wood stocks and falling round wood prices due to increased felling activity (beetle damaged timber) and slowing demand (Covid 19) there are signs that sawn timber prices have stabilised and lead times are starting to increase.

The US and Canadian market is showing signs of improving prices as the construction industry opens up again

Demand is picking up for prime material from US and Canadian markets and 2nd grades from China but production is lagging behind due to considerable downscaling over the last 18 months and the further impact of Covid on current production.

Stocks are low of most carcassing lumber both in the mills and merchants yards and buyers are searching to fulfil orders and having to extend lead times.

The net result has been a steady increase in prices during April and into May with weekly rises of 7 and 8% for prime carcassing and studding material. Prices have now increased above the 2018 levels for the same month but are still some way off the heady peaks of 2018.

The outlook is improving and as demand hopefully continues to increase the positive trend should continue.

As governments move to thinking about economic stimulus packages the million dollar questions will be "Are we going to see a green recovery or a grey recovery package?" Will governments focus the stimulus on sustainable products and innovative construction using low carbon solutions such as timber or will they revert to pouring concrete into runways, railways and motorways to stimulate the economy?

are a product of the destruction of demand due to the lockdown which is estimated to be a 30% plus drop. Frantic efforts are being made to reduce production and stabilise the price. As we come out of lockdown demand will increase and prices will start to track upwards again.

The pallet and packaging sector has battled on and most processors have been able to keep running at near normal levels, the harvesting sector has reacted quickly to targeting material for these sectors so raw material supply has been good. Hopefully as lockdown is scaled back these mills will see an increase in demand and be able to increase activity levels

The Fencing sector has been helped by the excellent weather and after an initial disruption to production most mills have resumed cutting and reported good sales activity. The fine weather and lockdown have encouraged domestic activity whilst the dry ground conditions have seen an upturn in agricultural activity after the prolonged wet winter. Yard stocks have fallen and lead times are now increasing for some key fencing products from the Southern mills.

Looking forward there would appear to be some short term disruption to forest production comes to terms with high forest and roadside stocks and reduced demand and looks for ways to regulate production.

Demand from the processors will take time to return to 2019 levels and it is likely to be a long time before we return to 2018 levels but the good news is we will see demand increasing.

The supply side in terms of wood coming to market is an interesting one, whilst there is a reduced offering in Wales from major investment managers there is an increased offer from Natural Resource Wales so supply appears to be in balance with demand for the moment.

In England there has been a drop in timber offered to the market this spring although there has been a little more activity this month with owners and managers looking to get work planned for the second half of the year.

Scotland has also seen reduced offering this spring from major investment managers but this was against a background of reduced demand prior to the pandemic, a number of other parcels have been postponed until there is more certainty in the bulk markets.

Hardwoods

The hardwood export market has resumed after a short interruption to container and shipping availability, demand has held up throughout the crisis and has now started to keep pickup.

Poplar demand has reduced and buying is in balance with demand, prices are stable at £43 to £48m^3 at roadside

Ash demand is very good and has increased recently and is reported to be "all systems go". Experiments with using "S" hooks to control splitting have been good and experience is being developed in best practice for summer felling of ash to enable this market to capitalise on better ground conditions in the summer, current prices are £90 to 95m^3 at roadside

Beech demand has strengthened but the quality requirements remain a challenge and currently buyers are struggling to find enough good quality beech to meet demand in workable parcels of 4 to 5 lorry loads. Prices have firmed to £75 to £82m^3 at roadside.

The domestic hardwood market is more patchy.

Oak demand has dropped off during the lockdown, most of the larger mills currently have enough stock and are wary about committing to more stock given uncertainty in economy.

Some of the smaller mills are still looking for material to fulfil specific orders but overall the domestic oak market is uncertain at the moment. If you have a good oak parcel it would probably be wise to postpone marketing it until this autumn.

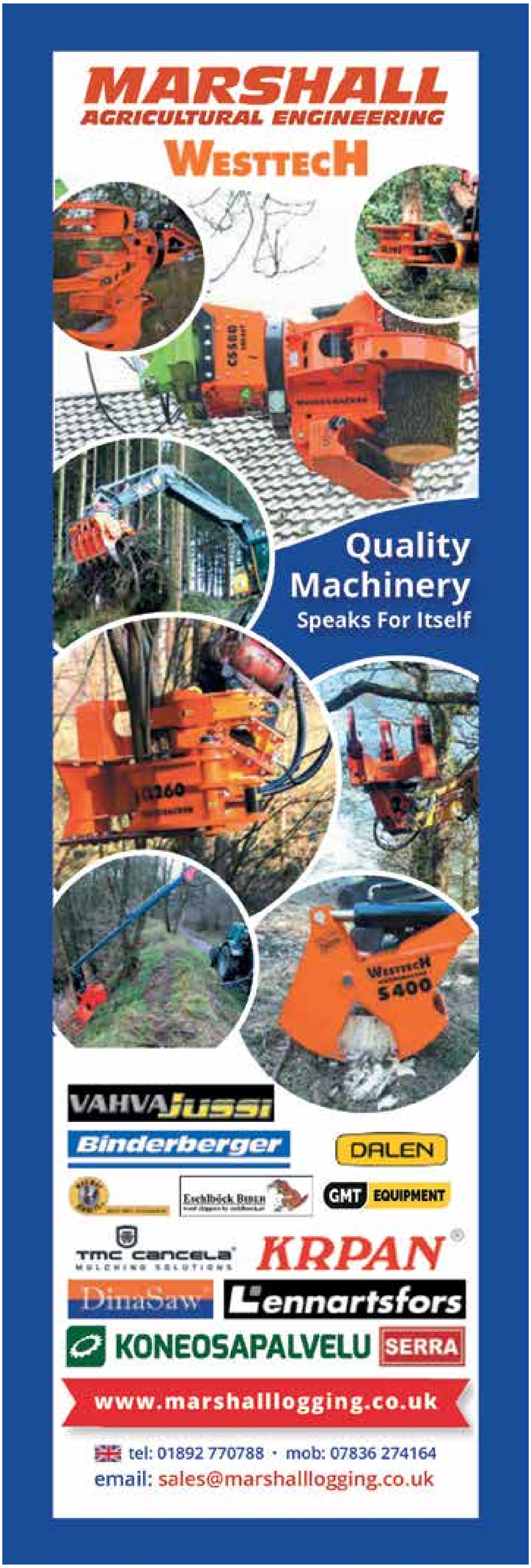
Domestic beech and ash is OK but at a price level slightly below the export price levels.

Of the minor species, Cedar is in de- >>

Roadside hardwood prices (£ hft) May 2020

	Oak planking	Oak beam	Oak fencing	Export ash & beech	White ash sawlogs	Export sycamore	Large Douglas fir and Larch
High price	£14.00	£10.00	£6.00	£3.25	£4.00	£5.00	£3.30
Mid price	£12.00	£9.00	£5.00	£2.75	£3.50	£4.00	£2.90
Low price	£10.00	£8.00	£4.00	£2.00	£3.25	£3.00	£2.90

These prices are for guidance purposes only and are based on historic market information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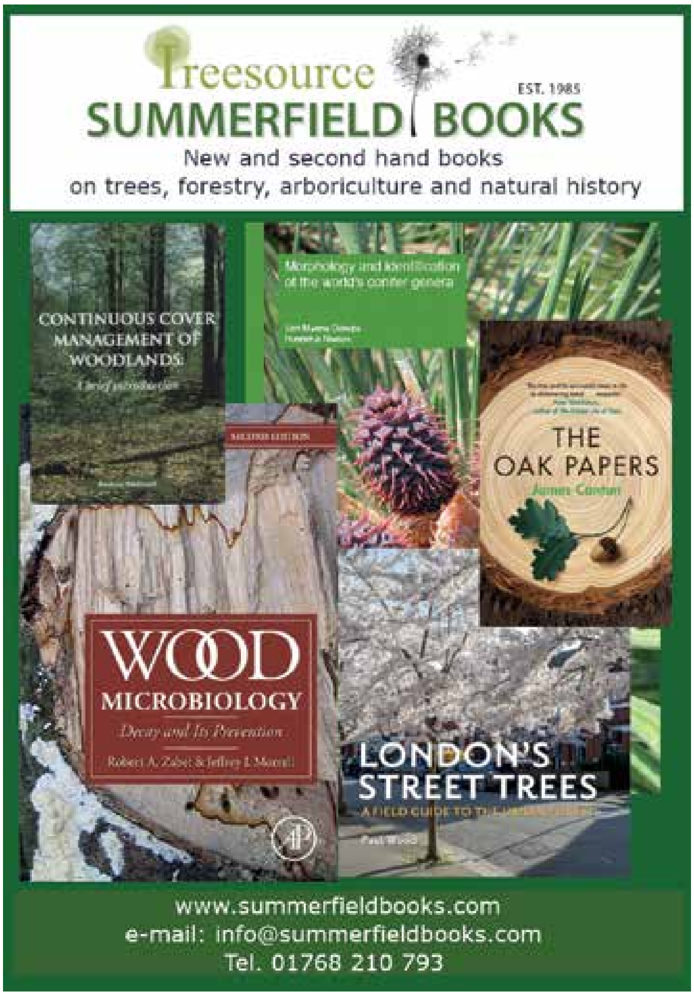
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>> mand currently for buildings, cladding and shingles, European larch for cladding and log homes and there is also some demand for Sweet Chesnut all on account of the natural durability of these species.

Firewood demand has held up surprisingly well with the recent frosty nights and people staying at home making a moderate year turn into a good year for many sellers. Despite cheap oil and increased supply of diseased ash firewood, competition from biomass buyers has meant prices have remained stable and currently there are not high stocks in the supply chains. The dry spring and efforts to divert harvesting capacity away from softwood jobs should see firewood production increase over the rest of the summer and may lead to an easing of prices.

There is now an emerging trend of landowners looking to replace lost "recreation and leisure" revenue elsewhere with income from timber sales during the second half of the year. Maybe the opportunity here is to focus on thinning woodlands and small scale felling rather than larger clear fells and use the opportunity to improve existing crops. With continuing uncertainty over commercial game shooting this autumn some landowners have either reduced or cancelled shooting for the year which presents another opportunity for work to be carried out in woodlands which have previously been ruled by gamekeepers. This includes felling or thinning to improve drives and bring woodland back into management.

Whilst current price levels are below the peaks of 2018 they are still good relative to the last 20 years and are strong enough to allow even the most difficult sites to be worked and produce a cash positive for the owner. These more difficult and lower production jobs help keep the harvesting and haulage infrastructure going whilst also regulating forest production until the market outlook is more certain.

In summary we have seen huge disruption to the industry and increased uncertainty but the industry has proved once again to be highly adaptable and resilient. The outlook remains uncertain in the short term but there are some positive signs.

TIMBER AUCTIONS

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PANDEMIC PERSPECTIVES

Potential economic impact of coronavirus on sector

Naomi Mervin and **Daniel O'Callaghan**, Forestry Commission

The global economy has been significantly affected by the coronavirus pandemic; however, we are yet to see how this will play out in the medium to long-term. This note sets out what the impacts may be in the short-term in key areas of interest, which may arise depending on consumer and business behaviour, alongside government decisions relating to changes in the infection rate, R.

Construction

The construction industry plays a significant role on the demand for sawn wood. Although accounting for the consumption of a third of UK produced sawn wood, it is a high value market for UK sawmill supply. As such, impacts on the construction sector will pass onto the sawmilling industry.

It is unlikely that the construction industry will return to the levels of activity seen at the start of the year anytime soon, however, there are positive movements in that restrictions have started to be eased for construction work. How confident consumers feel to start to make investment decisions (such as purchasing property or making home improvements) will have an impact on the pace at which the construction industry recovers. Consumer confidence levels are tracked by the OECD and can be found here.(search for Consumer Confidence Index).

Panel products

The slowdown in construction and wood waste recycling is likely to have a knock on effect on feedstock availability. The order in which businesses reopen, in response to consumer demand, will have a bearing on harvesting patterns (sawlog or small roundwood) and the flow of coproducts from sawmills to the energy and panel markets.

Wood pallets

Wood pallets have remained a critical part of the supply chain for the delivery of essential items from food to medicines and as such demand remains. However, like sawmills, the construction industry consumes a significant proportion of pallets (an estimated 40% of pallets go into the construction industry). Therefore, slowdown in the construction industry will continue to affect demand.

Biomass and woodfuel

There has been a reduction in use of biomass since the introduction of the lockdown as many commercial users shutdown their businesses, with supply meeting demand since. As these commercial premises begin to reopen as with lockdown restrictions are loosening, demand for biomass products is likely to increase. The sector faces a pressure to source material in the medium to long term from UK sources as throughput at sawmills has reduced and as such less co-product and also recycled wood material will be available. The lower oil price may also influence the price of other energy sources, including biomass.

The outbreak of coronavirus and subsequent lockdown coincided with the period of the year when demand for domestic use firewood reduces due to rising temperatures and thus hasn't had a real effect this market. If lockdown restrictions continue into the winter months and harvesting of smaller products for domestic use is reduced, there could be an impact on a lack of domestic supply of firewood. If other countries are better able to continue such supply then there may be an increase in firewood imports, which has biosecurity implications.

Nurseries

Many nurseries have been able to adapt to social distancing requirements. As outlined earlier, changes in consumer confidence and demand are what will have impact in the medium and long term. Given planting targets across the UK continue to exist, demand should continue. Land use change decision-making may be affected by the uncertainty in the economy. Nevertheless forestry remains a stable asset to invest in and as such woodland creation schemes should continue to be encouraged.

Timber trade lockdown learnings

TIMBER MARKET REPORT

Harry Stevens

Whether you have been self-isolating, furloughed or working on through, I am sure you, like me, have experienced a constant bombardment of lists of things to either do, buy, or as time has gone on, see.

When I was asked to write this article, I reflected on my own time in lockdown. I decided to see past all the lists that have been made across my household and create the ultimate 'list'. In theory, the most important list, namely, 'My Lockdown Learnings.'

So, without any further ado, here's my ten things I have learnt during lockdown:

1 The view from the window at home is much better than work. I watched a heron patrolling the river yesterday.

2 I don't want to be a primary school teacher.

3 We all have something other than Brexit to talk about now.

4 My wife is good at cutting hair especially, when assisted by my teenage daughters.

5 Things move fast in lockdown.

6, 7, 8, 9, 10... er that's it except ... predicting the future is a definitely a mug's game.

How did our sector experience lockdown?

However, once again I must take on the task of making some predictions and if it has all changed by the time you read this then forgive me as a week is a long time in lockdown as I have learnt and duly 'listed'.

In late winter, seemingly a lifetime ago now, the sector was anticipating a reasonably strong demand for fencing, uncertainty in the construction market, and 'steady as she goes' in pallet and packaging, co-products and small roundwood.

As Lockdown started and we saw the rush to build toilet roll mountains at home and pasta and rice being utilised as sandbags, demand for pallet and packaging went through the roof and, for a period, this was the part of the sector that was showing the strongest demand.

By contrast, we saw building sites shut down, and the demand for construction timber almost completely cease overnight, particularly as most of the distribution centres and builder's merchants had already closed their doors.

However, as time moved on and more of us found time on our hands due to furloughing, the better weather came and with it the strong increase in demand for fencing, already stimulated by storm damage in the south of England.

Fairly quickly, large parts of the timber processing sector also shut down with sawmills, particularly the further north you went, closing and furloughing staff. However, those that were focusing on fencing, particularly further south, continued to operate at some level.

Similarly, the particle board sector almost completely closed in response to concerns from their own staff, declining demand for end product, reducing supplies of co-products and very high inventories of finished goods.

What lies ahead of us?

So, what picture do we see as of 20th of May? Well, pleasingly, a sector that is starting to build up (in some cases quite rapidly) towards full production. But it is a very lumpy process as some parts of the sector come on stream before others.

Small roundwood is also starting to build at roadside and, whilst this traditionally happens at this time of year, it appears this time to be more pronounced and potentially longer lasting. If this is the case it could be an issue that inhibits production of sawlogs as producers will only tolerate so much build of roundwood at roadside.

So, here is where I once again pick up my crystal ball, with the last of my learnings ringing in my ears: What do the drivers look like over the next few months?

Covid-19 has not driven away the issues in Central Europe. They have not gone away. All reports indicate that the mild dry winter experienced predict a bad year for Spruce bark beetle outbreaks, perhaps as many as three broods rather than the two of last year. Already, the supply chain is badly choked with oversupply of all products and some growers are reported to be asking harvesting agents to take the wood away for no payment just to clear the sites. Sawmills are reported to be sawing dead wood and a two-stage market has arisen with reasonable prices paid for fresh logs but almost nothing for beetle damage product.

In Britain, undoubtedly, the short term will see variable demand that will be product specific and uncertain, particularly with regard to construction market as the sector comes out of lockdown. Building sites restarting will help with this in the short term.

Fencing is likely to remain in demand as people staycation and carry on working in the garden, while palletwood demand should remain at current levels as we all carry on ordering off the internet, and buy more food in the supermarket thanks to online ordering.

However, dark clouds are on the horizon. If the prediction of a major downturn is proved correct then all areas of the sector, construction, palletwood, fencing, and panelboard will undoubtedly be hit. Strangely enough though, experience teaches me that often the sector performs better at these times as we outcompete the imports. We will see...

Harry Stevens is timber buying director, Tilhill/BSW

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Navigating the way forward for rural estates

Experts from Savills look at the impact of Covid-19 on different aspects of rural estate management and how diversified business models might need reshaping.

The Missing Season - sporting

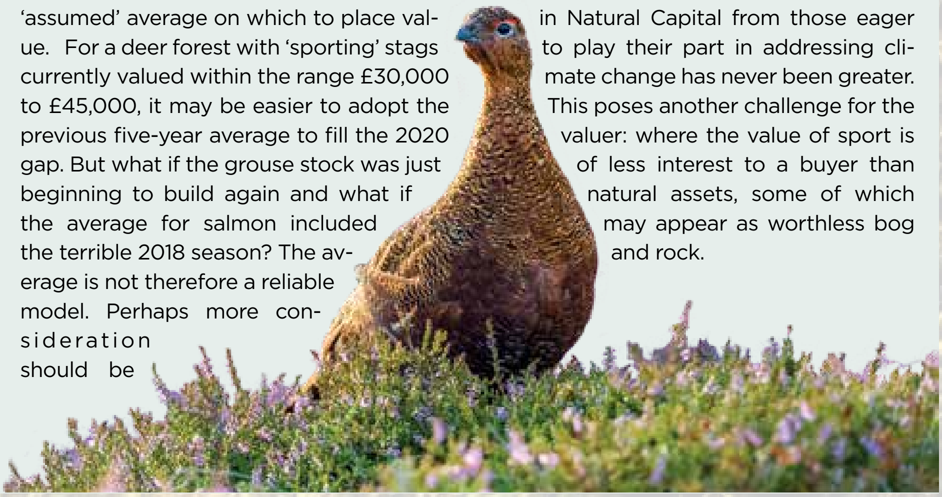
The value of sporting estates has traditionally been based on the bag, the cull and the catch. It is common practice to swither between a five and ten year average, but it is the sporting average that counts.

With continued lockdown it is not unreasonable to predict 2020 being a missing (or at least disrupted) season.

With the value of grouse currently ranging between £3500 and £4500+ per brace, the impact on the missing season could be significant. Likewise, a season when salmon are prolific in our rivers but are missing from the record books can have a devastating effect; a valuer may place a value of £4,500 to £6,000+ on a salmon (these values being rather less than at their peak of £14,000 per fish 15 years ago).

Roddy Willis of Savills said: "Perhaps the solution would be to replace a blank bag, cull and catch for 2020 with the previous five-year average to calculate a new 'assumed' average on which to place value. For a deer forest with 'sporting' stags currently valued within the range £30,000 to £45,000, it may be easier to adopt the previous five-year average to fill the 2020 gap. But what if the grouse stock was just beginning to build again and what if the average for salmon included the terrible 2018 season? The average is not therefore a reliable model. Perhaps more consideration should be given to future potential rather than past performance?"

Fortunately, previously underrated assets are coming to the fore. The interest in Natural Capital from those eager to play their part in addressing climate change has never been greater. This poses another challenge for the valuer: where the value of sport is of less interest to a buyer than natural assets, some of which may appear as worthless bog and rock.



Resilience in the forestry investment market

While there is uncertainty regarding many investment markets in the short term due to the fall-out of the coronavirus pandemic, Savills research reveals the resilience of forestry, with market activity continuing throughout April. Indeed, recent stock market falls may encourage further investment in various land and property assets, and the evidence from the last three major recessions has shown a 'flight to safety' into forestry as investors seek alternatives. Looking at longer term trends, the value of forestry sold in the UK investment market has grown from £58 million in 2011 to £121 million in 2019, with the average value increasing by 17% over the twelve months to October 2019 to £9,900 per gross hectare. Head of Savills Forestry James Adamson said: "New buyers are entering the market attracted by the recent performance of the asset class, but also drawn to the environmental benefits. The longer term outlook remains positive too – once the construction industry restarts after Covid-19, the UK Government's pledge for net zero carbon emissions is likely to drive the shift towards more sustainable timber-based construction methods, which will underpin timber markets and therefore asset values over the medium to long-term."

The cross party consensus for woodland creation has not gone away which is evidenced in Savills latest Spotlight on the Forestry Market, read here. Adamson continued: "Land for planting is still in strong demand and owners of suitable ground are continuing to progress their own plans to increase forestry holdings."

There was relatively strong demand for lower end timber products such as pallet wood, fencing and biomass at the outset of the crisis, despite the restrictions facing other parts of the property sector. This was fuelled, in part, by early forces such as the increased pallets required for food and medical supplies logistics and distribution. However, this has been set off against a slowing panel board sector. Demand for higher-end products such as saw logs is still low due to the construction hiatus. There is real uncertainty as to when demand will increase again but harvesting operations are still being planned to ensure landowners are ready to respond.

As with other markets, Covid-19 creates supply distribution issues, with sawmill operations unable to uplift timber from some active sites. This has led to delayed income and concerns that product weight will be lost at roadside in the warming summer weather. Some of the larger mills have confirmed that they will be increasing processing again over the coming weeks.

Diverse range of buyers sustain rural property market during lockdown

Prior to the outbreak of Covid-19 there was optimism in the market, which often accompanies Spring. Evelyn Channing, Head of Savills rural agency team in Scotland said: "Buyers had been ready to commit to the market following the General Election result, and those previously frustrated by the lack of stock to consider had been eagerly anticipating new farms and estates coming to the market. However, despite the lack of new properties and the inability to view, there has been a surprising amount of transactional activity in the rural land market during lockdown. A number of sales have been agreed with parties who viewed prior to lockdown or progressed where negotiations were ongoing at the end of March.

"The dramatic fall in the stock market may encourage those with funds readily available to invest in land and property. When life does returns to normal we may see an increased focus on Scottish rural property in particular for lifestyle and wellbeing reasons which have been brought sharply into focus during the pandemic. Interest in land for its natural capital and woodland planting potential is no less reduced by recent events. If anything, this non-traditional investment motivation is now more prominent in the market and may underwrite the long-term prospects for land values."

> The non-traditional investment motivation of acquiring land for its natural capital and woodland planting potential seems more prominent now than ever.

TIM M / SHUTTERSTOCK.COM

Future domestic holidaymakers likely to be drawn to secluded rural accommodation

Although Visit Britain has estimated Covid-19 will cost the tourism industry approximately £15 billion in 2020 and result in 22 million fewer visitors to the UK, it's not all bad news. The longer term outlook for UK domestic tourism is strong as overseas travel remains less appealing and in some cases impossible.

In the current challenging market, holiday accommodation providers are already trying to capture future bookings through offering heavily discounted vouchers that can be purchased now and redeemed in up to 18 months' time. We are also seeing a rise in 'no penalty for booking changes' offers.

These initiatives will be partly in response to concerns by owners that they may lose their Furnished Holiday Letting (FHL) status, which provides some tax advantages. The criteria for FHL status includes a requirement to let for at least 105 days per year and this will prove difficult or impossible in the current lockdown conditions.

Thankfully, HMRC permits holiday property owners to 'make a period of grace election' whereby FHL status can be retained if you can show that you genuinely intended to meet the letting condition in a given year, but were unable to do so due to unforeseen circumstances, such as Covid-19.

However, when restrictions are lifted, people will want to get out and about again and we firmly believe that the self-catering holiday accommodation market will thrive in a 'new normal' market.

> "We firmly believe that the self-catering holiday accommodation market will thrive in a 'new normal' market

Simon Foster, Savills expert in tourism, leisure and event said: "While domestic consumers may shy away from large hotels and resorts, it is likely that they will be drawn instead to rural and secluded holiday accommodation where guests can hunker down and feel safe.

"Owners of holiday cottages and glamping on rural estates should consider capitalising on the potential growing market demand and perhaps think about converting estate properties from long-term lets to shorter-term holiday accommodation.

Average annual occupancy rates in England of 60 per cent and 55 per cent in Scotland may well increase across the board during the short to medium term and to a far greater extent in prime tourism areas.

Savills diversification expert in Scotland Kenny Munn said: "For owners of holiday accommodation and those thinking of offering it for the first time, high standards and a broad range of facilities and added value services will be even more important than usual in terms of achieving high occupancy rates. Furthermore, rigorous hygiene measures will be essential and where these were taken for granted before, it is likely that these measures will need to be emphasised and heavily promoted in the future.

"The Instagram effect can't be underestimated in terms of attracting customers and maintaining occupancy rates. Run-of-the-mill properties have their place, but it's about exciting the customer and making them want to book. A unique property that also offers added value, with extras such as a hot tub and outdoor pizza oven, will help your property stand out as well as enabling premium prices to be charged."

Scotland: a fluid situation for rating

While there has not been any change to sporting rates liabilities themselves, there have been changes to additional relief and grant assistance (see box out below), and it would be fair to say that the situation continues to be a fluid one.

Peter Wilkinson, Savills ratings expert explains: "In the light of Covid-19, and since the original relief packages were published, several updates have been made and most ratepayers will now be receiving a relief of some kind. Lobbying continues with a view to securing 100% relief for the current financial year from ALL sporting rate liabilities.

"Another option for a ratepayer where relief options are not available is to submit an appeal on the basis of there being a 'material change in circumstances' (MCC), a previous example being the impact of extensive tram development works on businesses within Edinburgh city centre. Such an appeal must be submitted within six months of the MCC coming to an end. This is not a relief-driven process but aims to mitigate the base entry £NAV/RV value on which the liability is calculated and any adjustment will only be applied to the relevant period. Iit can take a year or more to achieve a resolution with the Assessor.

"It would certainly be fair to say that the pandemic, and resulting pause to shooting activities, constitutes a material change in circumstances. Whether that might be as much as 100% relief, or in step with any loss of income or agreed rental adjustments remains deed a rental holiday agreement remains to be determined."

In the meantime the original outstanding new base entry appeals continue, with agreements incorporating the updated commercial forestry provisions gathering pace. These are securing an average -50% reductions on commercial forestry entries.

The national prohibition of deer management due to Covid-19 restrictions has been met with some frustration as traditional vermin and pest control activities have been allowed to continue, albeit within social distancing restrictions. However one cannot ignore the fact that there has been a drop in demand for expensive meat cuts, with the resulting pause in business for game dealers who have lost their key markets for the time being.

The current prohibition also has a direct impact on sporting lease liabilities and renewals. Sporting tenants have paid rents for rights which they cannot exercise. Wilkinson concludes: "Parties are finding a workable solution particularly in relation to renewals during this period, but it would be fair to say the landowner will ultimately be the loser in rental terms."

TARGETS KEPT UNDER REVIEW

The Scottish Government has reported that Scottish Natural Heritage (SNH) and Scottish Forestry are keeping the impact of Covid-19 on deer management targets under regular review, and have provided the following update:

- Where targets form part of contractual leases, Scottish Rural Development Programme (SRDP) commitments, Management Arrangements or agreements under the Deer (Scotland) Act 1996, SNH and Scottish Forestry expect to show flexibility with any grant payments and will continue to provide advice and guidance in order to support land managers.
- Owners, tenants and occupiers of Deer Forests and Shooting Rights will be able to benefit from the 1.6% universal non-domestic rates relief in 2020-21, which will apply automatically to their non-domestic rates bills and may apply for different reliefs.
- The majority will be eligible for 100% rates relief through the Small Business Bonus Scheme, and unutilised shooting rights may qualify for Empty Rates Relief.
- **Financial support measures**
  The Scottish government's aspiration to support businesses during Covid-19, via a support package in excess of £2.3 billion, was welcome news for rural business owners. This includes a £100m fund to help SME businesses, meanwhile the UK Government's Self-Employment Income Support Scheme (SEISS) provides a grant to those whose income has been negatively impacted, worth 80% of their profits, capped at 2,500 per month.

Forestry: an asset to interest ESG investors?

There has been a growing trend linking an asset's ESG rating (Environmental, Social, and Governance) with good financial performance, and a lower cost of capital, *writes Savills forestry manager Tom Black.* Over a quarter of US assets under management now have an ESG rating.

Adoption of these metrics has not been solely altruistic but has pragmatic drivers. Businesses that have a better ESG proposition have more success in attracting top talent (generational employee values), creating novel markets (new consumer values), reducing waste (smaller bills) and lowering down-side risks (both regulatory and in their supply chains). Although these links could well be more correlation than causation, investors have appeared happy to accept the positive effects rather than spending time proving them.

For those of us in the rural world, the rise of ESG has begged the question of whether new income streams can be found for our Natural Capital services (see Savills Natural Capital Spotlight 2020). Productive Forestry has been well-placed to benefit from this trend as an asset that has both healthy returns, and solid sustainability credentials – including carbon sequestration.

There are, however, many disconnections and first-mover issues in this emerging market. Change does not just happen and often needs innovative contract mechanisms and agreed standards to lower friction. For this reason, we've started working internally with our Savills commercial colleagues – finding new tools to remove the barriers between our rural natural capital supply, and our urban clients' ESG demands.

But, while we are still seeing interest in ESG-related projects during the COVID 19 disruption, we must also be realistic. Many businesses will be licking their wounds for some time to come. Smaller clients have put projects on hold and larger ones may cap their levels of investment.

In short, the ESG trend shows that, more and more, having a sustainable footing is just good business. This realisation is good news for forestry and the rural sector in the long run, but businesses may have less room for manoeuvre in the short term.

For more insight, search for 'Savills Natural Capital Spotlight 2020'

More focus on natural capital and tree planting in post-Brexit, post-Covid-19 investment

Clive Hopkins, Head of Farms and Estates and Forestry Investments, Knight Frank

At the time of writing (22 May) – thanks to last week's relaxation in movement restrictions - we are once again out and about visiting farms and estates conducting viewings or preparing them for sale.

Well, in England at least. Tighter restrictions remain in place in Scotland and Wales. These are expected to be relaxed sometime in June.

To all intents and purposes the first half of 2020 will be seen as the six months that never happened in the UK's rural property market.

Some deals that were in the pipeline pre-Covid limped over the finishing line and a few new properties were advertised. But at the height of the lockdown the amount of land launched publicly was down by as much as 75% year on year.

So in which direction do we expect the market for farms and estates to head as it emerges from lockdown?

If we rewind back a few months, expectations for 2020 were high - much of the uncertainty dogging the market for the past few years had been resolved following the decisive general election result and our eventual departure from the EU.

A lot of that pent-up appetite from both buyers and vendors remains. Our phones were ringing as soon as it became known that the lockdown restrictions in England were being eased.

By the time you are reading this, we will probably have launched, or be well on the way to launching, several new farms and estates, and I know my colleagues in Scotland have some properties that will be of interest from a forestry perspective waiting in the wings.

According to our research, land suitable for afforestation in Scotland has seen some of the strongest price growth over the past 10 years – 68% compared with an average of 35% for all land types.

In terms of wider values, I don't foresee that there will be enough market evidence for our benchmark farmland index to shift in the second quarter of 2020, but come the third quarter some of the pent-up demand I mentioned earlier could push average prices up slightly.

However, as with any major period of uncertainty, the Covid-19 crisis will encourage some buyers to reassess their offers in light of the much talked about 'new normal'. How vendors react remains to be seen, but with few forced sales I cannot see this being the time to pick up a bargain.

From past experience, crises tend to send investors in the direction of tangible assets – we certainly saw that in the farmland market following the 2008 financial crisis – and our Forestry Investment team has a growing number of mandates from investors keen to access the long-term benefits of woodland ownership.

A sneak preview from the latest results of our annual Rural Sentiment also reveals that tree planting is high on the agenda of rural property owners. When asked what plans they had for the future almost half of those taking the survey said they were planning to plant more trees – the most popular response.

The full results will be available in the soon-to-be-released 2020 edition of The Rural Report, which includes a focus on forestry and provides more details of our new Forestry service line. This was set up to serve the growing interest from our clients in all aspects of woodland ownership.

One of the most interesting trends that we are seeing is rising demand from 'legacy' or 'moral' investors. They are less concerned about timber prices and annualised returns on investment, but improving the natural capital of an estate.

A good example of this was the recent sale of the 28,202-acre Auch & Invermearan Estate in Argyll and Perthshire. When we last sold the property a number of years ago much of the interest was in its hydroelectric potential, this time around it was the potential for landscape restoration on a massive scale that was a key driver.

Post-Brexit, in the brave new world of "public money for public goods", the entire concept of land use, particularly in the uplands, will come under much-needed scrutiny. Without the basic payment scheme, traditional farming may no longer make sense and the role of woodland, especially its contribution to mitigating climate change, will become more widely recognised.

When I started selling estates, the comment about the woodland component of a sale was invariably a slightly resigned "what on earth can I do with it?". People ask the same question now, but the tone of the question is entirely different because there are so many more options available. It's seen as an asset not a liability.

For further information please email **forestry@knightfrank.com**

Invermearan Estate in Argyll and Perthshire

Something for Everyone

The John Clegg & Co Summer Launch 2020 will see over 2,200 Ha of woodland and forestry properties across the UK come to the market; featuring a variety of forests of different sizes and locations. The properties are scheduled to be released online mid-June: johnclegg.co.uk/sign-up

Jon Lambert, Senior Director, comments "We are pleased to present the Summer Launch 2020, with over 2,200 Ha of UK forestry to suit a range of requirements. The forestry market continues to be strong and resilient, even in the face of a global pandemic. From amenity woodlands through to commercial plantations, woodland investment has continued to be a sound, inflationary-proof investment."

Featured Property...

Badvoon Forest

Ardgay | Sutherland
716.35 Hectares / 1,770.10 Acres

An extensive and productive commercial conifer forest with an extremely large reserve of maturing timber. Sporting rights included.

Offers Over £5,750,000

It's also good time to talk to us about buying and selling land for planting. Whether you're seeking independent advice on investment appraisals, valuations or new planting schemes, please contact one of our team.

PEFC revises online certification tool

MATTHIAS KREMER AND SOIL ASSOCIATION

PEFC UK has launched a new and updated certification tool designed to help Group Scheme Managers and forest owners gain and/or maintain certification. The new online forest certification tool aims to provide a simple and cost-effective solution to help UK woodland owners become PEFC-certified. It is hoped it will also help increase the UK's certified forest area, boost the supply of certified material to the UK primary processing sector and simplify the certification process for users.

Although PEFC forest certification has been established in the UK since 2010, it has long been recognised that a cost-effective certification solution was required to enable all woodland owners to participate in certification. Certified materials are now increasingly requested by a growing number of forest product users including retailers, the construction sector, energy suppliers and public sector specifiers.

More than one and a half million hectares of UK forests have been certified to PEFC's sustainable forest management standard since the first certificate was issued in 2010. This area covers all the state-owned forests in England, Scotland, Northern Ireland and Wales and many privately owned forest estates, managed through large Group Certification schemes.

PEFC UK are confident that the online forest certification tool will enable Group Scheme managers, improve efficiency, reduce costs. It will become a user-friendly method of assessing the compatibility of existing forest management plans and procedures, with those required by UKWAS, improving audit consistency through a series of user-friendly, online checklists. Elements of the tool have been carefully designed to help Group Managers compare and identify where scheme members may be having compliance issues. Once identified, they can then be dealt with in a timely manner.

Alun Watkins, who heads up PEFC in the UK commented: "There is increasing demand for home-grown timber and we will see an increasing amount of UK wood products entering the supply chain across a range of sectors. As the market is increasingly demanding evidence of responsible sourcing, it is important that certification is a viable option for forest owners of all sizes. Our new online tool will help streamline the evidence required during the sustainable forest management audit process. It has been designed in consultation with forest management professionals to be easy to use, providing a straightforward path to PEFC certification."

www.pefc.co.uk/forestry/online-certification-system

Are you being rail-roaded by HS2?

There is no doubt that HS2 is a controversial project but whether you are for or against its rapid progression through the countryside, it is important to seek guidance if your woodland is affected, says Mike Tustin of Tustins.

There are many aspects to consider, not just the impact to timber volume as part of the route clearance but also the availability of access and the overall appeal of the woodland that remains. Other factors include how the site access will be created and whether any temporary roads used for construction, could be retained for later timber haulage, what type of route is being taken, whether this is a cutting, embankment, tunnel etc and the overall expected timeline for the construction/access.

HS2 construction work underway in Warwickshire in May 2020

In several cases along HS2's route, woods are being crossed, leaving two parcels of land with the railway slicing through them. If this happens to you, you need to ensure that you can access both halves of the woodland and that the access will be of a standard that allows machinery in to complete any harvesting operations. You will also need to know if the remaining woodland blocks will be able to meet their initial objective, either as amenity woodland or a commercial forest.

Owners need to understand the value of their woodlands and take advice on the financial impact of a compulsory purchase on the surrounding land to help determine the best path and negotiate effectively with the government.

Tustins

www.tustins.co.uk

What are the options for employing EU nationals from January 2021?

Erin McLafferty
Brodies LLP

Coronavirus has impacted almost every aspect of life, including how we work and travel. However, the UK Government has stated that the one thing the pandemic will not impact is the date that the UK's Brexit transition period will end; 31 December 2020. This means employers should be preparing now for significant changes happening at the end of this year.

Current position

The current transition arrangements, which allow EU nationals to come to the UK without restriction, are due to end on 31 December 2020. While those EU nationals who come to the UK before this date should be able to remain in the UK after the end of the Transition Period - if they qualify via the settlement scheme - EU nationals who arrive from 1 January 2021 will be subject to the 'new' points-based system. This means that employers who recruit a significant number of EU nationals should plan any future recruitment with that in mind.

EU Settlement Scheme

Employers who currently employ EU nationals (and their family members) will be familiar with the EU Settlement Scheme, which gives certain EEA and Swiss nationals and their family members the ability to apply to stay in the UK indefinitely after Brexit. While many employers will currently be focusing on COVID-19 and the impact on their workforce, it is important for EU employees to continue applying for leave under the scheme, if they are entitled to do so.

The deadline for applying for those EU nationals already in the UK is June 2021, however we are anticipating delays in applications being processed under the scheme, in light of COVID-19 and UKVI closures. Therefore, employers should bear this in mind and continue to support and encourage their staff to apply under the scheme, to avoid any issues in the future and to enable employees to evidence their right to work.

Future points-based system

New immigration rules will apply to EU nationals coming to the UK from 1 January 2021. They will, in most cases, have to be eligible for sponsorship if they want to work in the UK.

The current points-based immigration system covers 'highly skilled roles' (ie graduate level or above) and requires a minimum salary of at least £30,000 to attract sponsorship. The new system will result in a reduction in the minimum salary required for sponsorship (in most cases £25,600, but it may be £20,480 in some circumstances). The new system will also cover 'medium skilled' jobs, so long as they meet the minimum salary requirements in place. Therefore, under the new rules from 1 January 2021, employers will only be able to recruit EU nationals under the new points-based system if they are for 'medium skilled' or highly skilled jobs, and if they earn the minimum salary levels. Employers will also have to put a sponsor licence in place to sponsor such workers and should be applying for them now if they are needed from 1 January 2021.

There are also significant costs applicable to sponsorship including visa fees, the Immigration Skills Charge and the Immigration Health Surcharge. It will be important for employers to understand the limits and costs of the new rules to plan for any recruitment under this route from January 2021.

Low skilled roles

Those roles classed as 'low skilled' are noticeably absent from the future points-based system. The Government has announced that, with the exception of the current youth mobility arrangements (which allow young people from certain countries to come to the UK for up to two years) and the extension pilot scheme for seasonal workers in agriculture, there will be no route for lower-skilled workers.

What should employers be doing now?

The new points-based system is a radical departure from the current system of freedom of movement for EU workers - and there are some important differences from the current Tier 2 rules. Although there has been some relaxation of the rules for skilled workers, the fact that there will be no route for the lower-skilled is significant and will be a concern for some employers. Businesses should identify any potential recruitment gaps now and decide how best to plug them.

Employers should also budget for increased visa and associated costs (that are not currently relevant for EU workers prior to 31 December 2020). Those costs could be significant for those who recruit a significant number of overseas workers and can amount to several thousand pounds per head.

MEMBER SERVICES

Legal helpline

The teams of lawyers who provide our helpline and assist the work of Confor are experienced in all legal issues that impact on forest owners or those involved in the forest industry, including employment law, health and safety laaw, planning law, tax and property law.

If you are in Scotland get in touch with:
Brodies Solicitors
Tel: 0131 656 3795
E: **confor@brodies.com**

If you are in England / Wales call:
Atkinson Ritson Solicitors
Tel: 01228 525221
E: **info@atkinsonritson.co.uk**

Gaining forest intelligence from space

GSI Head of Forestry
Maurice LeBlanc
on advances in forest intelligence

Why are satellites growing in importance in the forestry sector?

Although satellites have been available for communications and earth observation for several years for tasks such as measuring deforestation in the Amazon, the data has been less suitable for detailed measurements of forestry and agriculture. However, by combining both satellite technology and artificial intelligence, earth observation data can now be used across wide areas spanning millions of acres of land to support the capture of forest inventory, appraisals, planning and monitoring.

What applications can satellite data bring to the UK market?

Surveying of forest land has historically been on a commissioned basis to survey one area paid for by the owner or a potential buyer. The data generally remains private and confidential to the paying client. Larger scale inventory is undertaken by a public authority such as the Forestry Commission to perform a national inventory every few years. This leaves a gap in the industry where there is a demand for current information across wider areas at the county level looking at forest assets. Demand for this has come from areas such as the real estate industry who target properties on and off the market for clients and from infrastructure companies who have assets which cross multiple property ownership boundaries.

How does this work with ground measurement plots and aerial surveys?

Ground measurement plots and aerial surveys are still very much a requirement for precise measurements that meet certification and valuation requirements. Satellite data exists to support new types of area wide decision making. With the introduction of this low cost, near-real time, area-wide view of multiple forest properties, satellite data is now a new and additional source of information for the industry to use in determining forest metrics at a macro level. Historically collected ground plots and aerial surveys are key inputs to machine learning models which will predict forest conditions, volumes and distributions. Local professionals can collect plot data that is ready for use in machine learning-based forest models and support the on-going optimisation and validation work.

An unexpected derivative of this work is that it supports the selection of better and optimal plot locations for more efficient and effective surveys.

What are some of the challenges?

Just like you cannot put crude oil into a car without refining it, you cannot put unrefined data into an information workflow. In its raw form, satellite data is unusable for measuring forest inventory. This is because 70% of the earth is covered by cloud on any given day (and more often in Scotland) it needs to be refined into a clean, analysis ready - usable form that is phenology aware.

From big data to smart data

The role of geospatial companies like GSI is to transform satellite measurements (big data) taken over the period of a year or more into usable data where it is analysed using machine learning to provide smart data on the forest metrics including species, volume, carbon and condition.

Why should forest managers and woodland owners invest in this technology?

This technology works in partnership with more traditional stand assessment methods. By using satellite data it opens forestry information out to a wider audience at a county or national level to those who require it for maintenance, planning, matching real estate with requirements on a national scale, forest and carbon investment opportunity and land use analysis.

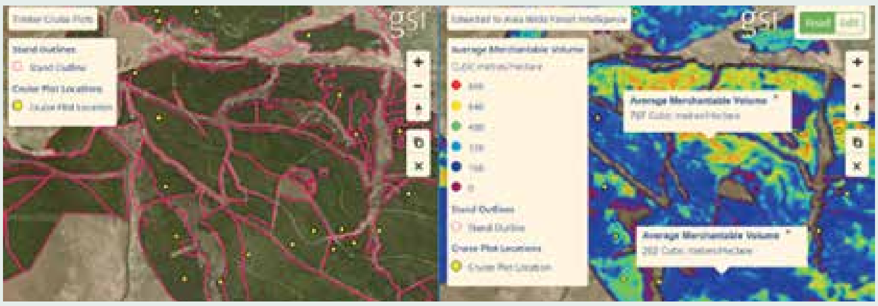
WHAT IS NOW POSSIBLE AT THE COUNTY LEVEL?

Discover
Best-value investments in property and carbon opportunities

Measure
Quantify in-stand forest volumes and carbon stocks

Manage
Monitor ongoing forestry operations and support optimal harvest operations

GSI, an Edinburgh based company, has measured over 70m acres of land in the last 12 months across the globe for landowners, investors, forest managers, real estate agents and the forest carbon market. Having developed the system initially to measure forestry, real estate and carbon in North America, GSI is now actively partnering and collaborating with the UK real estate and forest industry providing county wide and national forest intelligence maps.
surfaceintelligence.com



Extending ground plot value county wide

The above map shows a plantation forest and yellow dots indicate ground measurement plots. The picture on the right shows a wide area map extended by training GSI's AI system on the ground plots and applied to current satellite data. Revealing the within-stand volume variations at a county wide level. It shows the widely varying growth and maturity across the area.

Innovative approach for better seed growing technologies

Forestry and Land Scotland (FLS) have been trying to boost the forest nursery sector by supporting research and innovation into technologies that could improve the growing of forestry trees. Innovation manager **Josh Roberts MicFor** describes the process.

The pressure on plant and seed supply has been building in recent years. Some of the drivers of this pressure are welcome, such as the growth in woodland creation rates in Scotland and a harvesting boom on the back of high timber prices. Some are 'normal' challenges, such as the masting cycle of forestry trees, which means we can go years with very low quantities of seed produced by orchards. Others are a sign of a changing world that we must adapt to. The heatwave of 2018 resulted in 10% of the plants sown at Newton Nursery (FLS' main nursery) growing properly.

Taken together it meant we started 2019 on the back foot: seed stores almost depleted of Sitka, a fraction of the growing stock we had expected and increasingly ambitious planting targets on the horizon.

We knew we needed to do something, but what? It takes years of careful management to create a top grade Sitka orchard. How could we magically produce all the seed we needed in time to meet demand, and could it be done in a way that didn't compromise on quality or break the bank?

Instead of jumping straight into the usual brainstorming approach, I indulged in something that too often gets squeezed out of 'urgent' problem solving: trying to understand the problem itself.

I visited Alan Duncan, Head of FLS Plant and Seed Supply at Newton Nursery and we just talked about his operations. We weren't trying to solve the problem at hand, just help me understand it as a symptom of the multiple, competing trade-offs that need to be made every day. I also visited other nurseries, such as Cheviot Trees, and the seed science experts in Forest Research.

One statement from my visits redefined the way I looked at the problem: "If you grew this seed under laboratory conditions, you would get over 300,000 seedlings per kilo, but because of all these problems we usually only get around 100,000 usable plants".

We didn't need to magic up more orchards, there was huge untapped potential in the seed we already produced! That sounds completely obvious when you say it, but when you're wrapped up in the pressure of having to solve each successive crisis to come your way, missing

Newton forest nursery at Elgin, FLS's in-house nursery site

THE FIVE PARTNER ORGANISATIONS

Cumbria Tree Growers are pioneering the use of a technology that is cutting edge in the vegetable growing industry. The system combines the best aspects of cell grown and bare rooted growing systems by germinating tree seeds in glasshouses in a biodegradable tape. After 12-14 weeks of growth this tape is planted in nursery beds using rapid, automated machinery..

Elsoms, one of the top seed treatment companies in Europe, tested a range of advanced seed treatment techniques currently used in world class agriculture and horticulture. They aimed to adapt these techniques for forest trees. One of the many benefits of this work could be the ability to significantly improve lower quality seed lots, important for economic species but also for rare or difficult species.

Forestart, the UK's biggest seed trader, are developing a biodegradable matting that allows seeds to be placed out at the correct distance prior to sowing. It also suppresses weed growth from below while allowing growing trees to take root. This could have major benefits for labour savings and for reducing chemical usage.

Forest Research, the internationally renowned forest and tree research institution, developed a test that identified the vigour of individual seeds and seed lots, not just their germination potential. Other tests that attempt this usually take days and are very costly, whereas this technique can be done in a few hours and at a fraction of the price.

Silvibio, a company founded as a direct result of this initiative, are developing seed coatings that retain moisture around the seed. This will allow the seed to germinate and grow more consistently even when water is scarce. Even in northern Scotland we can lose 90% of the plants we expected in a year like 2018. Therefore a product that alleviates the problems of water availability has global appeal.

the obvious is exactly what we all do.

Identifying the right problem was only the first step. We then did something that is well-known and used by world leading companies as a way of cracking tough problems, but that is very different to the way we normally operate in FLS. We advertised a competitive tender based on the problem we had, not the solution we knew about. We described the desired outcome (more trees), a bit about the things that affected the outcome and then invited applications from anyone and everyone. Applicants simply needed to describe their idea and how they would make it work in under 2000 words. This technique is used by companies from IBM to Nike. It's based on an appreciation that no matter who you are, not all of the smartest people in the world work for you. So why rely on only that pool of people for all your creativity?

We advertised through the Scottish Government's CivTech programme, with funding support from the Scottish Enterprise Can Do fund. The CivTech programme supports public bodies to make people's lives better by solving problems with technology. We ended up working with five brilliant companies: Cumbria Tree Growers, Elsoms, Forestart, Forest Research and Silvibio *(see panel).*

Adapting to the Covid-19 lockdown

These companies presented their products at the Edinburgh International Conference Centre at the beginning of March 2020 to an audience of 500 people from all over the world. However, due to the current COVID-19 pandemic and resultant lockdown, the work we are doing to improve these technologies has had to adapt. Like every public agency, our priority is to support the Scottish Government in preventing the spread of the virus, protecting our NHS and saving lives. As a result we have had to make some serious adjustments to our work plans.

Spring sowing is a critical time of the year for nurseries. However, establishing saplings in a tree nursery is an intensely manual process that requires people to work in close proximity for long periods during the short and intense sowing season. Clearly that is not possible while maintaining required physical distancing..

Just as it was starting to look like we were going to make some progress in reversing plant supply pressure, we began to fear that 2020 would go by without a single new tree being germinated at Newton. Then we realised we could have found a solution to that problem before it even arose.

The tape system developed by Cumbria Tree Growers by-passes a lot of these problems entirely. By shifting the germination to a glasshouse, it means seedlings can be sown in the field much later in the season. The high levels of automation mean minimal staff are needed, and physical distancing can be observed throughout. The initial elements of production use existing capacity in the agricultural sector, as the technology is already used for field grown vegetables. These operators are all still running as a key industry. However, many of the operations are automated and are not running at full capacity at this time of year. The number of plants involved in forestry is comparatively small and can be easily absorbed within the agricultural capacity.

So we have taken a calculated risk. FLS has decided to plant a significant proportion of its 2020 nursery production of Sitka Spruce using this technology, approximately 4 million trees. We don't know for sure how well this will work out but we are optimistic based on what we've seen so far and compared with the alternative of no production. This could be a saving grace.

Research and innovation are unpredictable. To be done right it needs patience, technique and long term investment. However, it can sometimes yield solutions to problems that didn't even exist when you set out. People want to innovate when a crisis is already upon them which can be a recipe for disappointment if it doesn't yield results within the timeframe needed. Long-term exploration of, and support for, research into persistent problems in the forestry sector is essential to the survival of the industry. But to succeed it needs us to actively support it all the time, not just in times of urgent need.
Josh Roberts

Forests as virtual aula

Home-schooled children can learn how to manage a forest, become diet detectives or try being a farmer. Scottish research institutes are sharing educational activities and resources for teachers, parents and learners to use during the coronavirus pandemic.

Among the activities is the forest health game Caledon which enables players to discover the challenges of managing a forest and dealing with issues such as invasive diseases, grazing animals and illegal loggers.

The Royal Botanic Garden of Edinburgh website gives context information on Curriculum for Excellence Level 3 and 4 Experiences and Outcomes from this game, and specifies minimum systems requirements.

www.rbge.org.uk/learn/schools/caledon/

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A Canadian forestry and wood sector being stirred up

Peter Moonen of the Canadian Wood Council looks at some impacts of Covid19 on the sector – and finds both negatives and positives.

Canada's forest and wood sectors have not been unscathed by Covid-19. For many sectors globally, the pandemic is highlighting the need to do some things differently. For the forest and wood sector in Canada - one of the country's most important export sectors and employers - from coast to coast Covid-19 is causing hardship for the sector in the near-term but with hope for the longer-term.

The Canadian industry is inextricably linked to the US housing market, so the industry will feel the effects of a US economy.

Housing market

The impact: Covid-19 has led to nearly two-dozen mill curtailments and some closures in British Columbia (BC). The US housing market experienced a record slump in April with residential starts down about from the previous month. The Canadian market fell by more than 50%. The residential sector, both single and multi-family, is the key market for structural lumber and panel products.

There is hope: The most recent framing index (obtained from Random Lengths) is up 6.3%; and builder confidence and home ownerships rates in the United States and home ownership rates are both on the upswing. As well, homebuyer demand is expected to rise as States begin to reopen after Covid-19.

Forestry sector and timber sales

The impact: Forest Economic Advisors, a leading forest sector analyst group, posted that there are weaker lumber and panel sales in May. Moody's also suggest the economic and housing slowdown caused by Covid-19 may not be resolved, even if interest rates are lowered.

There is hope: Challenges related to Covid-19 are spurring innovation in forestry, forest product research and forest product distribution. As well, the Mayor of Quesnel in the heart of BC's vast forest region suggests the pandemic could be an opportunity for BC forestry.

> Building codes are adapting to recognize the opportunities for wood products in tall, bigger and high performance structures.

Mass timber construction

The impact: The cancellation of Google affiliate Sidewalk Labs' ambitious vision for a tall wood waterfront development Toronto, partly in response to Covid-19, is seen as a blow to the City and to the showcase of heavy and mass timber in large urban and mixed use community densification developments.

On the other hand: A surge in interest in mass timber construction has resulted in some increased capacity in existing plants and new manufacturing coming on stream in newly announced facilities

Carbon

The impact: The virus could make Canada's bad wildfire season worse and see the forests release more CO_2.

There is hope: Building codes are adapting to recognize the opportunities for wood products in tall, bigger and high performance structures. At the same time, designers and some cities are recognizing the importance of embodied carbon impacts of materials and the role wood can play in both avoiding emissions and sequestering carbon in buildings.

Canada is gradually opening up its businesses in response to a declining number of Covid-19 cases. While the industry has aspirations and opportunities looking into the medium- and longer-term, it may need a helping hand in the near-term.

Combustibles legislation threatens structural timber industry

The UK Government's open consultation on the Fire Safety Bill which affects the use of combustible materials closed on Monday, 25th of May. The proposed legislation in England would ban the use of combustible materials in and on external walls of buildings, with changes affecting new residential buildings in England with a floor about 11m (approx. 4 storeys).

This proposed legislation would significantly impact the ability to build with timber as a primary structural material, particularly affecting the CLT and engineered timber markets. Engineered timber offers a sustainable alternative to traditional methods of construction, however, this ban is likely to slow down its demand at a time where the building industry will focused on green recovery post-lockdown.

The Fire Safety Bill

The Fire Safety Bill is part of the UK Government's response to the tragic events of Grenfell in 2017. There is recognition across the industry of the importance of and necessity for robust fire safety measures in residential buildings, however, the proposed approach to implementing a 'check box' exercise in relation to building materials does not properly consider other key factors such as design approach, building use and location.

Confor's response to the consultation

Confor calls for:

- a more holisitic approach to fire safety, citing that a **risk-based approach** is a safer way of determining overall fire safety and performance of a building as it takes in to account multiple factors such as design, use, materials and location.
- **further research**, with emphasis on international collaboration, for example, looking at case studies abroad which demonstrate the use of materials such as timber in multi-storey buildings safely.
- **recognition of the environmental and sustainable contribution that the timber and forestry sectors make**. Using sustainably sourced timber in the built environment leads to more growth of trees, which leads to greater amounts of carbon being sequestered in sustainably managed forests.

Confor's response echoes other industry voices concerns and endorses the Confederations of Timber Industries (CTI) position. Wood for Good have also been supporting the timber industry in their efforts to raise awareness of the consultation and encourage responses. Industry voices Timber Trade Federation (TTF) and the Architects Climate Action Network (ACAN) has been running a campaign within the timber and design industries to encourage responses from those who wish to see timber remain firmly on the table as a sustainable alternative for building and design.

> "The proposed ban on engineered timber is likely to slow down its demand at a time where the building industry will focus on green recovery post-lockdown.

PANDEMIC PERSPECTIVES

Forestry education during and after lockdown

Five leading education providers explain how they are delivering education and skills training under these exceptional circumstances.

NATIONAL SCHOOL OF FORESTRY

University of Cumbria, National School of Forestry

At the National School of Forestry, the implementation of the lockdown in response to the COVID-19 came at a time when we were close to the end of face-to-face teaching and students and lecturers were looking forward to the end of year study tours. All activities, practical sessions, field trips and the study tours were unavoidably cancelled. We thank those who were due to host the wide variety of visits both in Scotland and England for their understanding, most of whom had to focus their efforts on their own businesses too.

The remaining teaching sessions were moved on-line and additional resources were made available to our students to assist with the completion of their outstanding assignments. All staff had to work remotely, and we went about creating on-line presentations and arranging lectures and tutorials for our students using various platforms such as Skype and Zoom. Our students too had to make decisions regarding relocation or, in some cases, to stay in their student accommodation. Access to specific software was facilitated by using remote desktops.

Our students on placement, have either finished earlier than planned, have been furloughed or are continuing to work with appropriate mitigations in place. For our students looking for placement opportunities for the coming year in many cases these are already in place and, with other students, interviews have either been held virtually or have been delayed until there is more certainty.

We are encouraged by the number of applications and, within our specialism and the coming academic year new starters looks to on track with 2019 which was above average. Whatever the environment in September we are ready to welcome our new starters and returning students and provide them with the tools and resources to proceed with their academic work and progress their careers.

For more information contact
Mark Tomlinson
mark.tomlinson@cumbria.ac.uk

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> Some lecturers have been able to produce virtual tours of assessment sites using video while others have provided simulated survey data

>>

University of the Highlands and Islands Inverness College

Scottish School of Forestry

Forestry education and skills training in Scotland, as elsewhere, has had to adapt to the current remote working environment.

Amanda Bryan, Head of the Scottish School of Forestry, Inverness College UHI explained: "We have been able to move the vast majority of our teaching and assessment online. This has been helped by being at a point in the academic year when many of our courses were well advanced and the excellent online teaching infrastructure that UHI has. While students have missed out on field visits we have been able to adapt many of our courses.

"Some lecturers have been able to produce virtual tours of assessment sites using video while others have provided simulated survey data to enable students to complete assessments."

Commercial training offered by the Scottish School of Forestry has had to cease at present and programmes such as the International Summer School offer for Tokyo NODAI University and others has also been put on hold. Both the Scottish School of Forestry and SRUC have confirmed that scenario planning for the next Academic Year is in hand and that both institutions are continuing to accept applications to study across the full range of forestry courses that they offer.

However, Amanda continues, some of the more practical, skills-based courses such as forestry machine operation, chainsaw and tree climbing are more challenging to deliver in an online environment and they are exploring are range of solutions for training delivery.

For more information contact
Amanda Bryan
Amanda.Bryan.ic@uhi.ac.uk

PRIFYSGOL BANGOR UNIVERSITY

Bangor University

For the forestry degrees at Bangor University, it's going to be almost business as usual for the new academic year starting in September 2020. Nearly all of the teaching on our MSc degrees has been delivered simultaneously to students in Bangor, around the UK and around the world for several years already. Lectures are streamed live – we send out a weblink ahead of time for those wanting to follow live – and they're recorded, so those unable to watch in real-time can watch where and when it suits them. Even learning that is largely discussion-based is "blended", meaning that students routinely join in from wherever they are (we're all zoom-masters now), or watch the recording afterwards. These discussions are based on pre-set reading, so that even when students can't join live they can send in pre-recorded input to share if they want.

We will utilise all this successful experience of on-line learning for our BSc forestry degrees too. Of course there may be some restrictions on practicals and field trips. We'll re-organise our programmes so that practicals are focused in 2021 when we hope that students will again be able to go into the field as a group. We know that nothing beats "learning by doing", and we know that students benefit hugely from field visits facilitated by our fantastic network of alumni. So if it's humanly possible to run field practicals we will, even moving them to the summer, rather than winter (which students might be quite glad about, based on previous chilly days spend in Eskdalemuir or Clocaenog). As another option, this month we've actually run forestry field trips using Zoom, with our hosts streaming video and answering students' questions live. It's not quite David Attenborough production levels, but it works incredibly well.

It is also very much "business as usual" for the wide range of professional placements for our students during 2020-2021. All in all, Bangor University has built up considerable resilience in our teaching system, and these qualities rub off on our students.

For more information contact John Healey
j.healey@bangor.ac.uk

> We've actually run forestry field trips using Zoom, with our hosts streaming video and answering students' questions live

SRUC

Barony College

Martyn Davies, Forestry Programme Leader of SRUC, says: "The SRUC has had to adapt their forestry education and skills training. We have been able to complete a range of teaching and assessments using our online e-learning systems combined with video conferencing. Some of our courses have had 'seed and plant growth packs' sent out to students, allowing plant & soil science to continue."

While theory elements have been and are continuing to be delivered using e-learning systems, the practical teaching has been on hold and continues to be on hold for the near future. The SRUC's main challenge for delivery remains around practical based courses including activities such as chainsaws, tree climbing, pesticides and forestry machine operations. SRUC's forestry team is working closely with colleagues at the Scottish School of Forestry, to find a solution that works for the students and the wider industry. "We are continuing to explore the following: compressed block weeks of training, increasing daily teaching hours and transport of students to college campuses and practical work sites."

The Covid-19 situation has also affected our apprentices with some being furloughed and others undertaking extra or alternative duties for their employers. SRUC's forestry staff have also assisted local communities by delivering prescriptions and shopping to those in need. Martyn Davies SRUC's Senior Lecturer for forestry took part and assisted in delivering a virtual camp, full of activities, reaching over 24,000 young people.

SRUC's forestry consultants have continued to deliver the high quality of services to clients with social distancing in place.

Both SRUC and the Scottish School of Forestry continue to plan for next academic year, all be it with some continued on line delivery. Applications are strong across the full range of forestry courses on offer.

For more information contact
Martyn Davies **Martyn.Davies@sruc.ac.uk**

MWMAC Training and Assessment Centre

As a privately owned Training Provider and Assessment Centre, based in Mid Wales, we are effectively "on stop" at the current time due to the threat of COVID-19. Before March 26th we were delivering approx. 6-8 events a week (onsite and offsite), but due to the risks associated with the virus we have been forced to stop 95% of the events were deliver; the 5% that are still continuing are events for Key or Essential Workers.

Normally our training courses are made up of four (sometimes as many as twelve, depends on the course) individuals from different businesses and from different parts of the country; trainees can be with us from one day, for the likes of a Brushcutter course, to six days for a Basic Chainsaw or Climbing course. The risks associated with COVID-19 means that the bringing together of these individuals is now extremely difficult; we cannot predict if these individuals have been adhering to the current physical distancing guidance, and also based in Wales we continue to have strict travel and distancing regulations in place.

As the events we deliver are practical in nature, being able to embrace the online training movement and deliver remotely is equally as difficult. We have actively been looking at a way forward, to utilise remote learning now and in the future, and have signed up as a Lantra Remote Training Provider; this means that we can access a catalogue of courses that have been deemed appropriate to be delivered via e-learning or online learning.

The H&S@W Act states that those who are on site or at work must be competent to carry out the job they have been employed or contracted to complete; training and assessment will become increasingly important for many businesses in the coming months as they begin to recover and get back to it.

Therefore, we have looked to the future and what the "new normal" is likely to be for training and assessment provision. With COVID-19 Risk Assessments in place, it is very evident that the number of trainees on each course will need to be reduced, the number of days training will need to be flexible, and physical distancing measures during training and assessment events will need to be in place for many months to come.

For more information contact Victoria Laurie **victoria@mwmac.co.uk**

New eligibility rules for Education and Provident Fund

The Trustees of the Fund have recently reviewed the eligibility requirements of both Funds to widen access to both the Education and Provident Funds. You now simply need to be a member of Confor, or an employee, rather than having been a member for a year. They hope this will encourage more applications to both elements of the Fund.

In these uncertain Covid-19 times the Provident Fund is available in cases of hardship, for example long-term illness, personal injury or death. It has flexibility in support levels and all applications are treated in confidence by the Trustees. In the past the Trust has supported both individuals and small businesses to help cope with challenging circumstances of both a financial and/or personal nature. If uncertain about eligibility an initial application may be made to ascertain if the situation warrants a more detailed bid for support.

The Education Fund makes awards to applicants for technical and professional courses such as chainsaw competency, but also for educational trips and activities. Awards can not only cover course fees but also costs such as travel and accommodation, though not equipment. Awards are generally limited to £1000 per application.

In the last year, the Education Fund has supported a range of activities from chainsaw, tree climbing, forest certification and HGV driver training; to a scientific visit to the LUKE Institute in Finland to learn about forest organic carbon and nitrogen models; HND course study trip across the UK; and forestry college students attending the launch and "virtual" awards of Confor's #TheFutureIsForestry Essay and Video Prize.

Applying for either Provident or Education Funds is easy - just complete the short application form on the Confor website > Resources > Education & Provident Fund.

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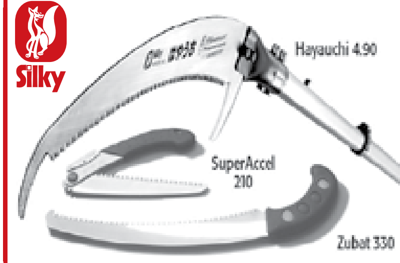

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Returning to work

Left: Bark stripping by grey squirrels becoming serious. Notice flakes of back on the ground.
Right: Squirrels not only strip bark they will open up nest boxes to access birds eggs and your chicks.

At the extremity of our daily 'lockdown' walk is a rectangular, four acre woodland of mainly mid-rotation sycamores. My wife and I have got to know it well and it seems to be managed for partridges with a couple of feeding stations. Although only one of many woods we pass, it caught our attention early on; it displayed something we had never seen before. For about three weeks from late March to mid-April the woodland floor was a carpet of violets. The whole wood was covered, not just patches: a violet monoculture! Let's hope in high summer we see plenty of fritillary butterflies which are so dependent on this lovely, delicate flower.

Now to take up our theme, what are the first matters to address when returning to a woodland neglected because of the Covid-19 restrictions? I suggest four priorities.

1 **Check boundaries, rights of way, and fences.** There have been surprisingly high winds in many areas this spring and checking on this and any other damage is a must for health and safety reasons and one's duty to the public.

2 **Check newly planted trees for weeding.** June, and even July, are not too late to control weeds around young trees. The rule of thumb is to keep largely weed-free a one-metre diameter ring. If you only have a few trees old carpet makes an excellent mulch for this job, but if you have dozens or hundreds to deal with than a single herbicide application may be best making sure the spray is kept off the seedling/small sapling itself. Both mulching and herbicide kill the weeds which is best. Much research has shown that simply cutting weeds, although ensuring the tree is not overtopped and shaded, can worsen stress in dry weather from competition for moisture by vigorous weed regrowth.

3 **Is there grey squirrel damage?** Bark stripping by squirrels occurs mostly between May and July. Only if you have widespread peeling damage on root spurs or the main stems of beech, sycamore or oak, instigating control, even in June, could be 'better late never'. I wouldn't bother if it's just the odd tree and I wouldn't bother if the damage is mostly small postage stamp size nibbles where the wretched animal seems to be testing a tree's 'strippability'. If stripping is half-hand size or larger belated squirrel control may be worthwhile.

4 **Desperate for firewood.** The government is tightening up on wood fuel and allowing only well-seasoned firewood to be used. By well seasoned is meant fully air dried where the moisture content (MC) is around 20%. Normally this means cutting firewood one winter in readiness for burning the next or the one after. So what if things have been delayed by Covid-19 and you are desperate to cut firewood for this winter? If you are starting in June, I would advise only using birch, hazel, sycamore and possibly poplar and willow. Cut logs to fit the grate and split them at least into quarters. These woods dry rapidly which is helped by being well-split. Stack them in a dry place with good airflow. They have a chance to become fully air dry in about six months.

I've not mentioned ash, often considered the best of firewoods, because although it can be burnt straight from the tree because its unseasoned MC is a low 30%, it takes a long time to dry down to >20%. Oak and hornbeam are also slow to dry out.

FORESTRY IN PICTURES

Twenty years ago western red cedar logs were almost unsellable. Now quality logs are more valuable than any conifer other than Douglas fir – hence the guard dog.

Photo: Nick Hoare

Want to see your picture here?

Forestry in Pictures is a regular feature in FTN. For every issue, we select the most impacting photograph sent by a reader. If you have a photo you would like to see published here, please send your file to **Stefanie.kaiser@confor.org**. Please include your name, brief description of yourself and the picture and a credit.

Photos should relate to forestry and timber and be of high-quality (minimum resolution 300dpi). Exceptional pictures might be considered for the front cover of a future FTN issue.

By submitting a picture to Forestry in Pictures you give Confor permission to use the file for non-commercial purposes in Forestry and Timber News or the Confor website. Photos will always be credited.

COMING UP IN AUGUST – GET INVOLVED

In August, you can expect to find our annual show review – this year for Confor's flagship event, the APF, taking place in September.

Of course, there will be more on the road to Green Recovery after the severe Covid-19 lockdowns in Spring.

Remember that FTN is your magazine – get in touch if you want to suggest editorial or give us feedback on articles we have published in the past.

Confor members, send us your company's news updates or pitches for feature articles.

Note that our general editorial deadline for August is 10 July. If you would like to pitch an article idea, please do so by the end of June.

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