

Why wood is vital for a future green economy

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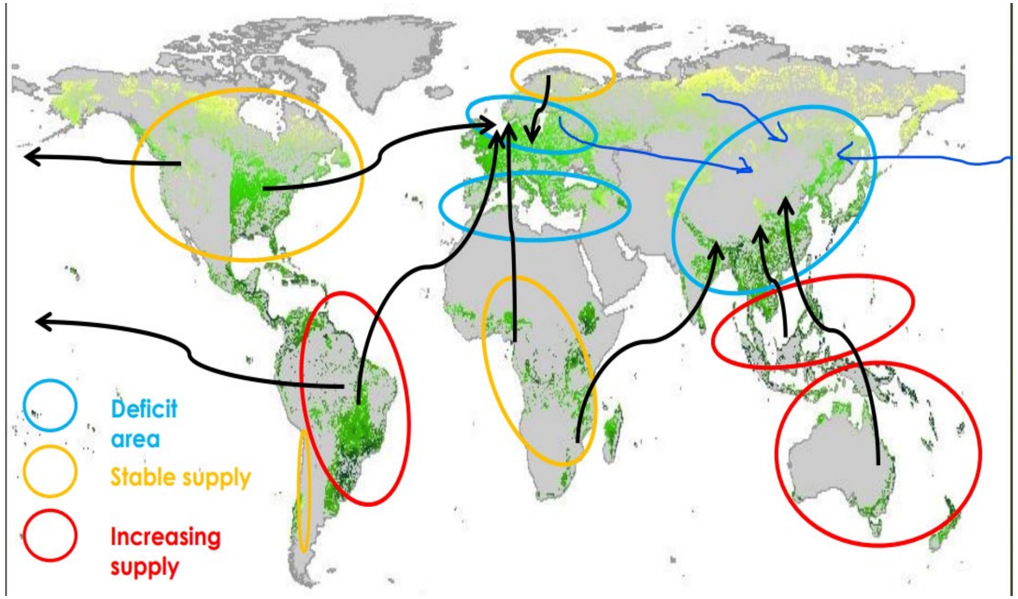
Scope of presentation

- Global and domestic drivers for wood.
- Overview of the domestic timber resource.
- Current and future opportunities for homegrown softwood in construction.

Drivers for future global scale demand for wood

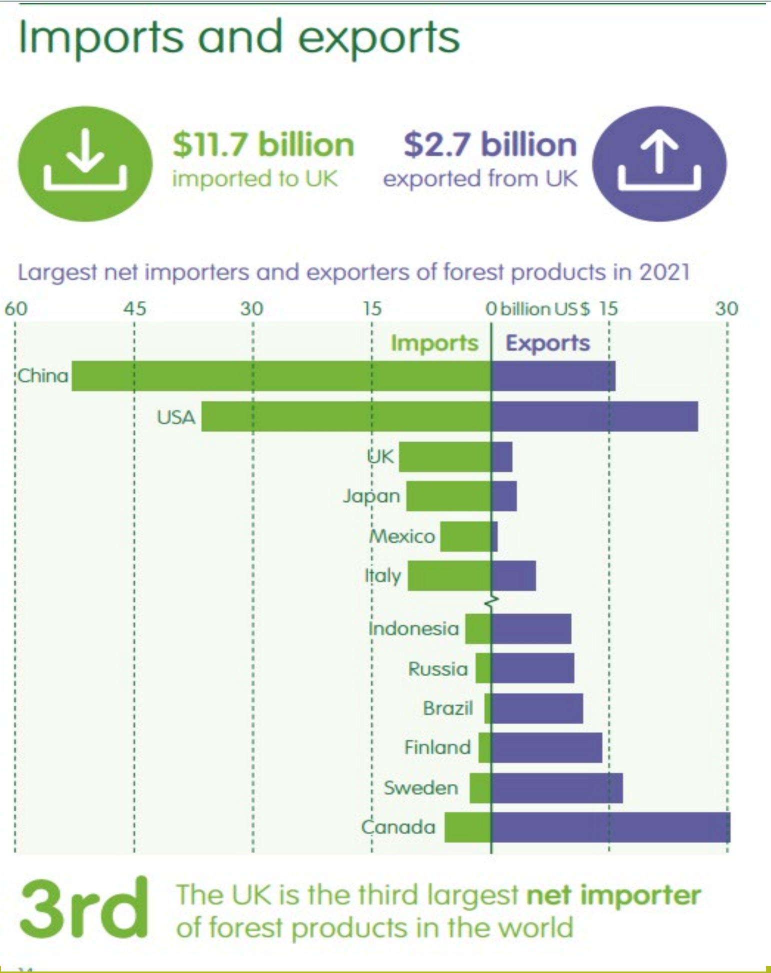


- **Population growth:**
  - 7.8bn now
  - 10bn by 2050 - ??
- Improved health, wealth & urbanisation –more housing.
- Increased undertsanding on the positive impact of **sustainably managed** trees and wood products to mitigate climate change:
  - E.g. Timber policies in France and Sweden.

- Reported that global demand for **certified** forest products will double, possibly **quadruple**, by 2050.

Overview of domestic demand for wood products

- UK is the 3rd largest net importer of wood products in the world.
- ~81% of our wood derived products is imported.
- Forest cover:
  - Europe 46%
  - UK 13%



Climate change drivers for growing domestic supply and demand

All GB administrations exploring how to encourage the increased use of sustainably sourced wood products in construction for carbon **storage** and **substitution** for higher embodied energy materials.

- Valuing Timber in Construction Policy Roadmap.
- National Wood Strategy
- Wales Timber Industrial Strategy.

Future focus on reuse and recycling to extend life of wood fibre– circular economy and added economic activity.

Economic drivers for growing domestic supply and demand

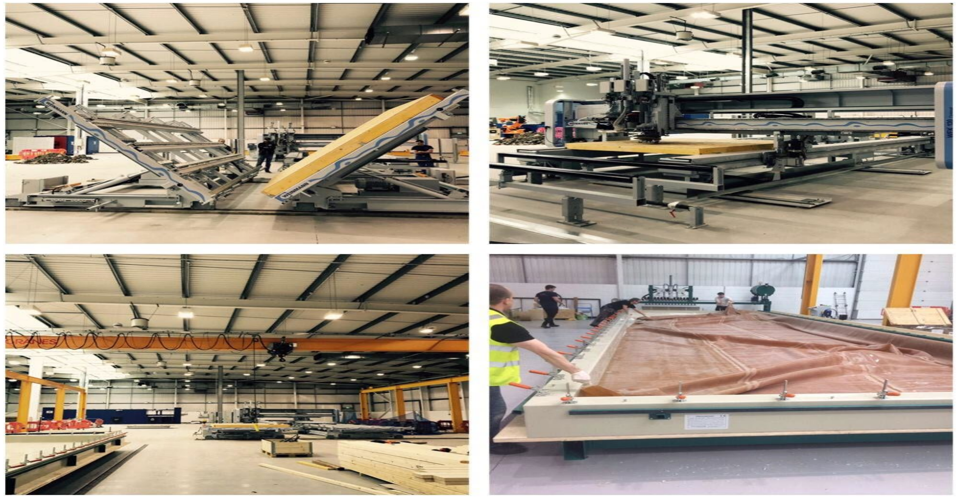
ECONOMIC GROWTH

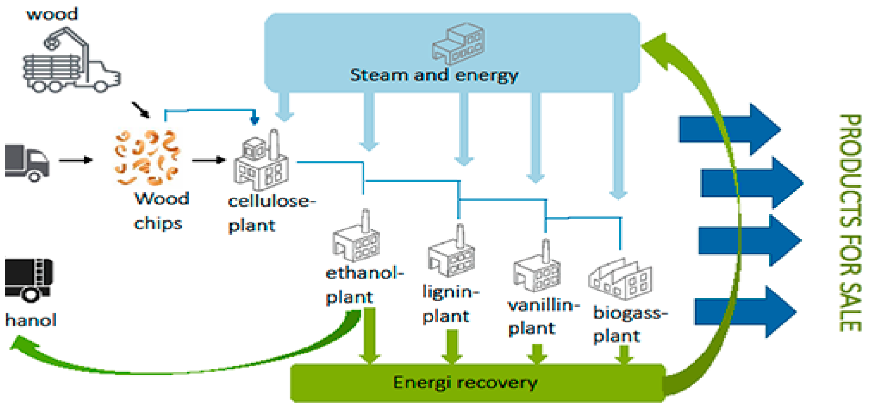
Reduced dependence on imports.

Onshoring processing, manufacturing and added value activity.

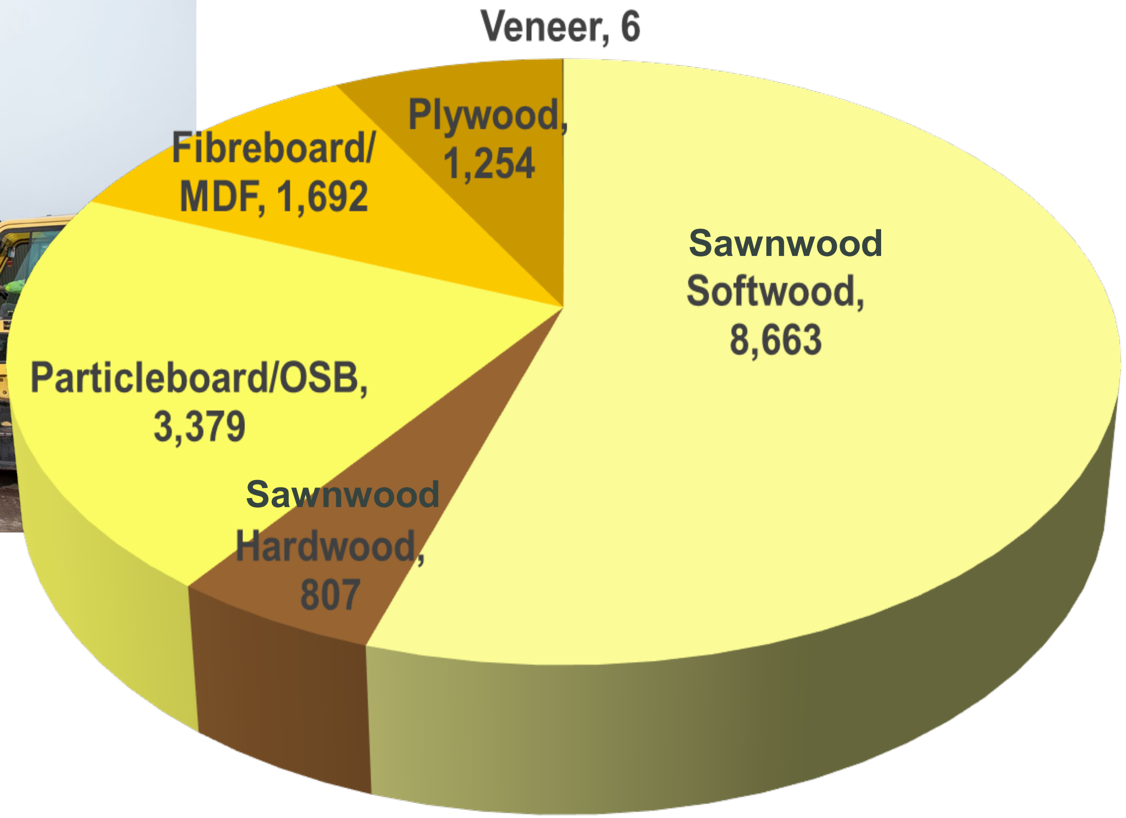
Potential future demand for feedstock to replace petro-chemical-based products.

All leading to more well-paid secure jobs supporting the rural economy.

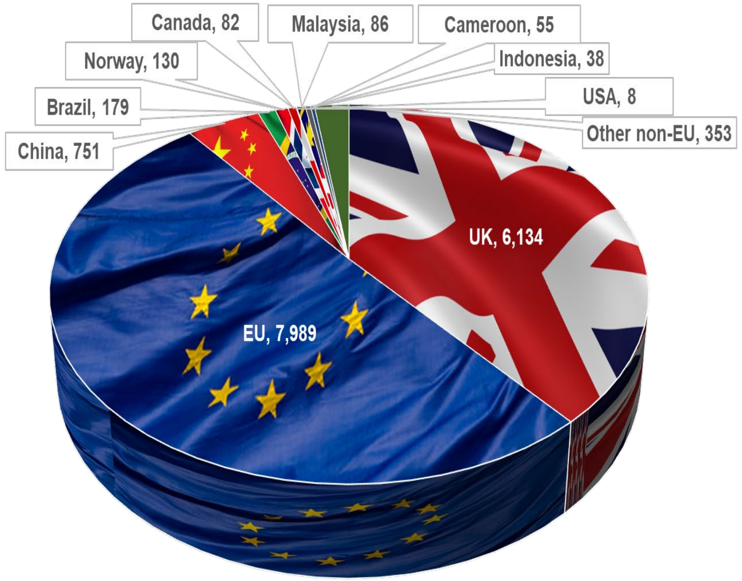




UK construction related timber consumption 2022 (Thousand m3*)



Total UK Consumption:
15.8 million m^3



*2023 Forestry Commission Statistics Report
Figures exclude CLT & Glulam

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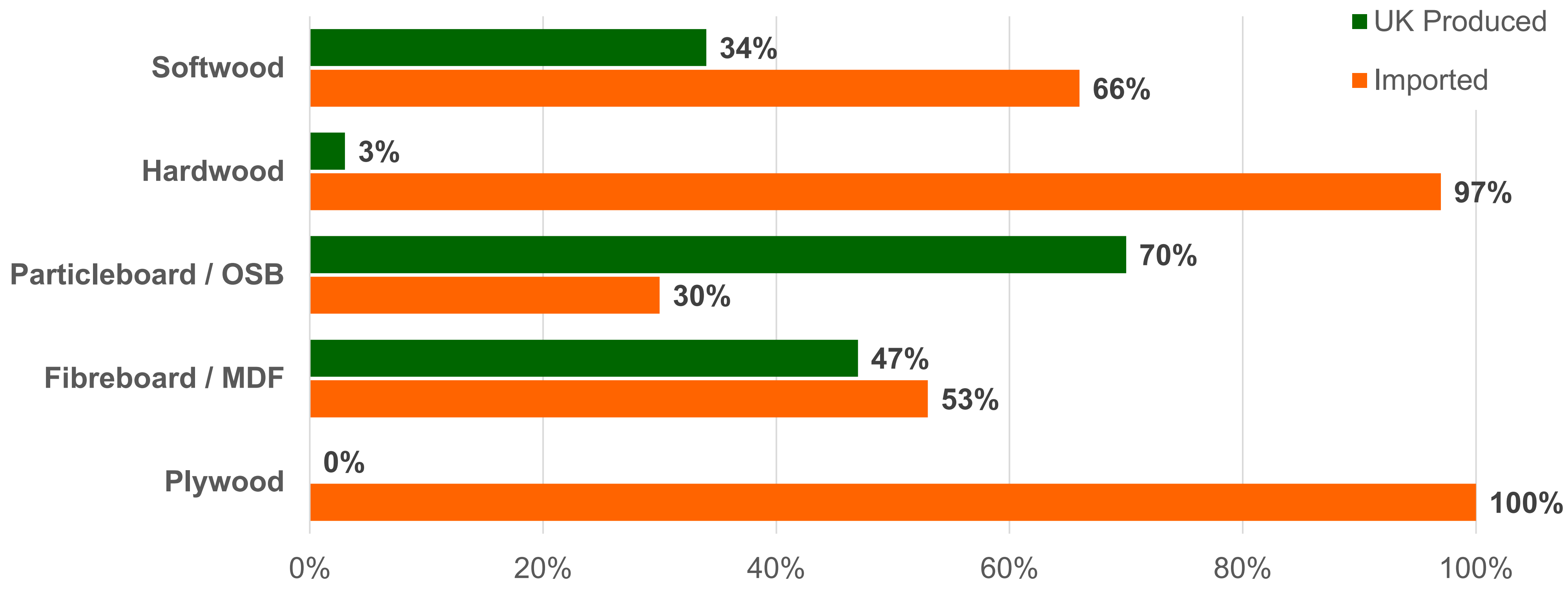
UK timber market: UK supply v imports 2022*



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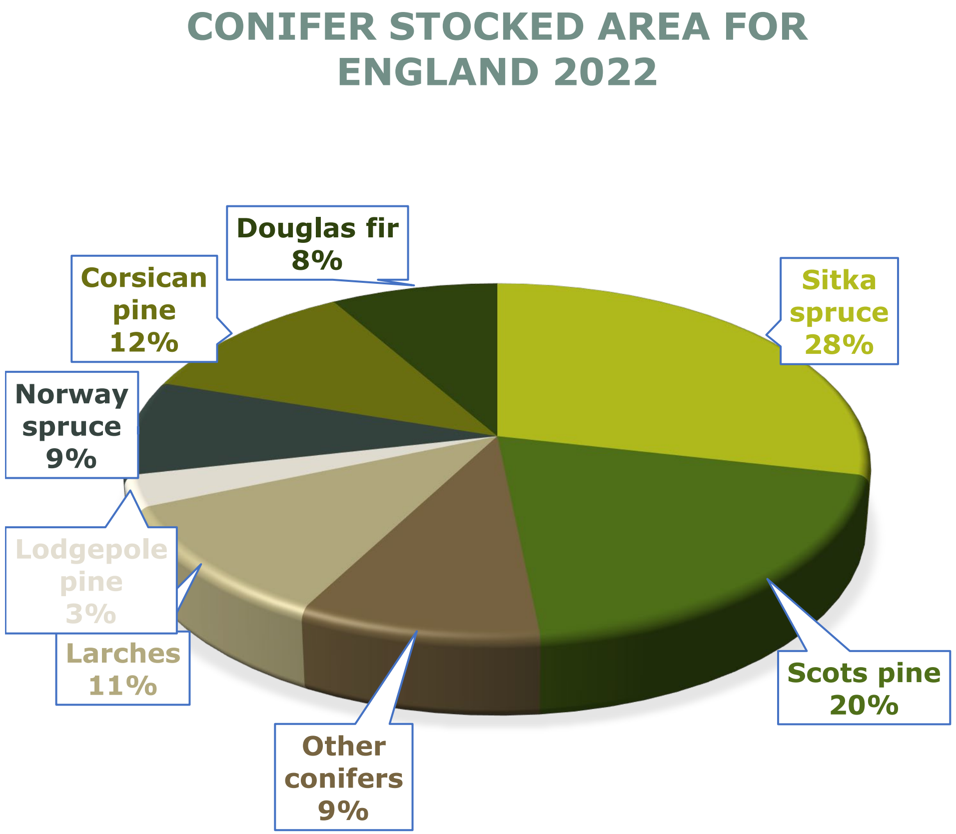
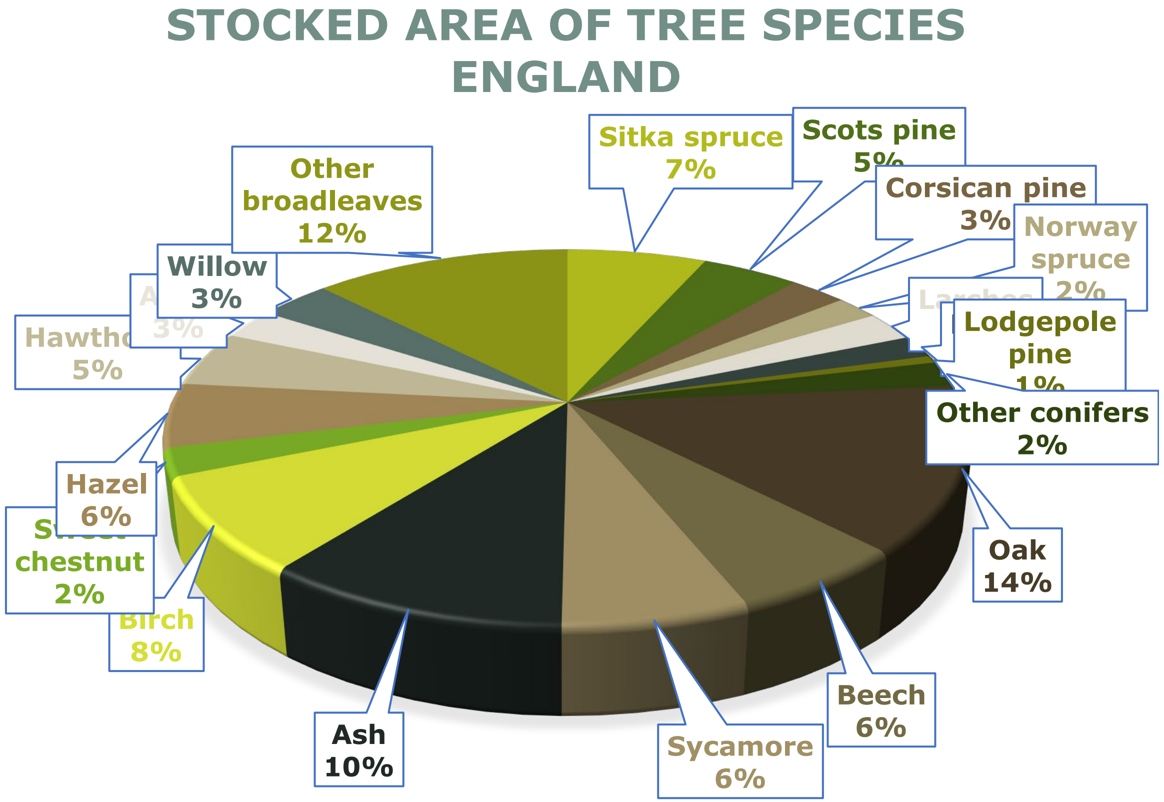
Tree species breakdown in England by area





Softwood sawnwood and panel production and markets

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Table 2.14 Production of sawn softwood by country, 2011-2020					thousand m^3
	England	Wales	Scotland	Northern Ireland	UK
2020	1,007	271	1,683	349	3,311
2021	1,050	293	1,859	371	3,574
2022	945	245	1,570	349	3,108

Product market	England	Wales	Scotland	Northern Ireland	UK
Construction	11	7	34	27	25
Fencing	61	27	32	36	41
Packaging / pallets	23	47	26	30	27
Other	5	18	8	7	7
Total	100	100	100	100	100

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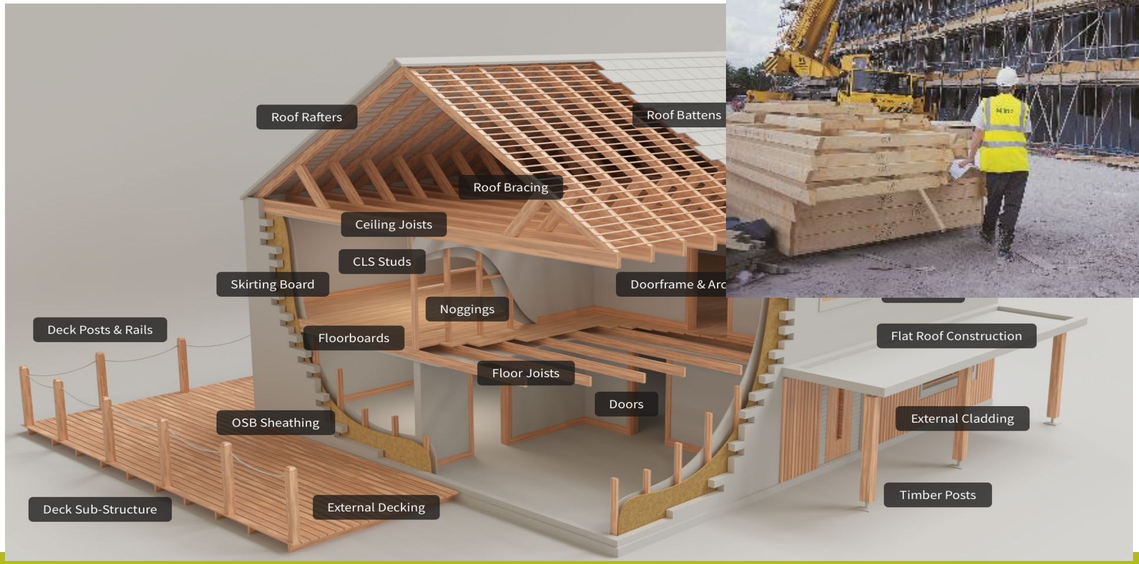
Opportunities for homegrown softwood products – Construction

New Build house starts

- Increasing the timber frame activity in England.
  - Current market share of new build 9%; Scotland @90%.
  - Increased to 40% market share in England results in potential increase in demand in
    - **Graded sawnwood ~1.3M m3**
    - **Panel board ~ 400k m3.**
    - **Wood fibre insulation ~ ??**



Opportunities for homegrown softwood products – Construction

New Build public buildings

Schools and sports halls e.g. Gen Zero

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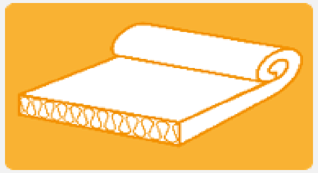
Opportunities for homegrown softwood products – retrofit

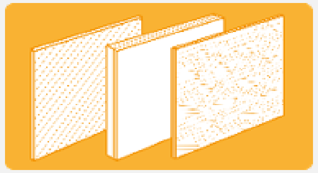
RETROFIT PRODUCTS

47 case studies were analysed to reveal the application of timber retrofit products.
Each of the **5 categories** of retrofit interventions included an in-depth case study.

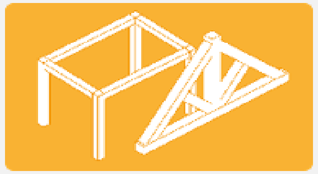
Retrofit intervention categories



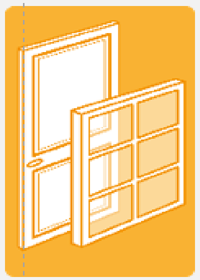
INSULATION SOLUTIONS (45%)
- Wood fibre
- Blown cellulose fibre



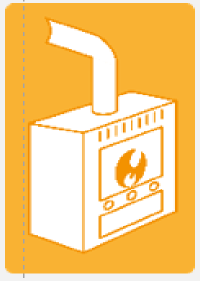
WOOD PANELS SOLUTIONS (36%)
- OSB
- Plywood
- Chipboard



OFFSITE SOLUTIONS (8%)



WINDOWS AND DOORS SOLUTIONS (47%)



FUEL SOLUTIONS (10%)
- biomass

Scottish Forestry Coilltearachd na h-Alba
Edinburgh Napier University
Centre for Offsite Construction + Innovative Structures

Opportunities for homegrown softwood products – retrofit

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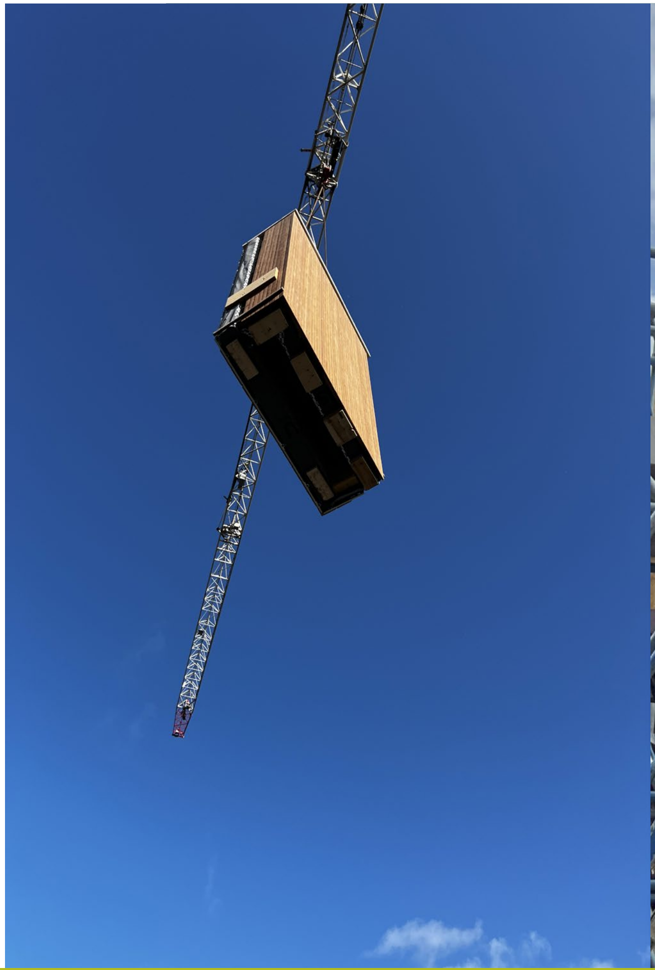
Opportunities for homegrown softwood products: Hiltingbury Primary School retrofit.



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In summary

- The UK is one the largest importers of wood products in the world.
- Global demand for wood products is forecast to quadruple in next 30 years.
- UK must plant more productive forests to minimise risk of greater competition and reduced reliance on imported wood products, and sequester carbon more quickly.
- Therefore, important to account for this when delivering new climate change targets of planting 30,000 hectares per annum by 2024-25.
- Opportunities for onshoring manufacture of some wood products such as offsite timber systems, solid laminate wood products and wood fibre insulation. This will also deliver new skilled jobs.
- This could contribute significantly to increasing the use of wood fibre in construction **storing** carbon for long periods and **substituting** higher embodied energy products.
- Continued need to research and develop new products and systems that will increase the life of woodfibre through reuse and recycling of wood fibre.
- Overall, the short to medium term future looks positive for the UK wood supply chain and it can contribute significantly to the UK Net Zero ambitions and green recovery. But, we need to secure an increase in longer term softwood supplies for further growth.

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Thanks for listening! Any Questions?