



Timber in Construction Roadmap 2025

Andy Leitch, Deputy Chief Executive, Confor

26/11/2025





BACKGROUND to TICS



- The Government has previously committed to expanding timber construction in the Net Zero Strategy and England Trees Action Plan.
- Timber recognised as essential to net zero by the Environmental Audit Committee and Climate Change Committee.
- The Government created the Timber in Construction Working Group (TiCWG) to outline a roadmap for timber expansion. Revised and relaunched in 2025.
- Fits in with wider policy objectives such as the Future Homes Hub
- National Wood Strategy shares 24 actions with TiC.

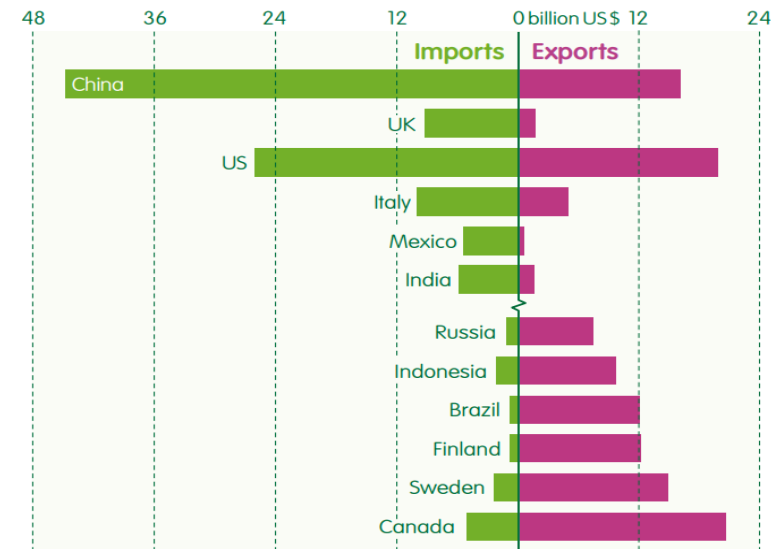
UK Timber Security

- UK is the 2nd largest net importer of wood products in the world.
- ~80% of our wood derived products is imported.
- Forest cover:
 - Europe 46%
 - UK 13% (3.25M hectares)

Imports and exports



Largest net importers and exporters of forest products in 2023



2nd The UK was the 2nd largest **net importer** of forest products in the world in 2023

Values are expressed in US dollars. Source: Food and Agriculture Organization (2025).

THE OBJECTIVES OF THE TIMBER IN CONSTRUCTION ROADMAP



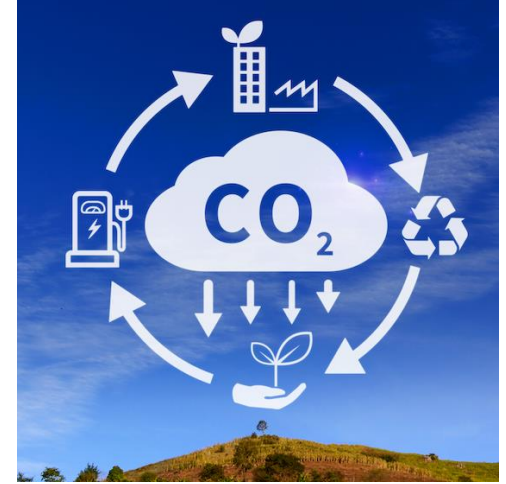
To safely increase the amount of timber used in construction



To increase the amount of homegrown timber used in construction, and increase the timber grown in the UK for construction



To help the UK meet its net zero target by 2050



To grow the economy through decarbonization

SUPPLY CHAIN COLLABORATION

The collaboration of STA, TDUK & Confor under the banner of the CTI acting as TICR25 secretariat



TIMBER IN CONSTRUCTION ROADMAP THEMES AND WORKING GROUPS



1

Improving data on timber and whole life carbon –
Chair Charlie Law, TDUK

2

**Promoting the safe, sustainable use of timber as a
construction material –** Chair David Hopkins, TDUK

3

**Increasing skills, capacity and competency across the
supply chain –** Chair Robert Hairstans, Napier/ NMITE

4

Increasing the sustainable supply of timber –
Chair Andy Leitch, Confor

5

**Addressing fire safety and durability concerns to
safely expand the use of engineered mass timber –**
Chair Nic Clark, KLH / STA

6

**Increasing collaboration with insurers, lenders and
warranty providers –** Chair Dominic Lion, Gallaghers
Insurance /STA

7

**Promoting innovation and high performing timber
construction systems –** Chair Sam Hart, BE:ST

TIMBER IN CONSTRUCTION ROADMAP THEMES AND WORKING GROUPS

Strategic Impact

- Brought together the full wood supply chain from seed to structure, homegrown and imported to focus on a holistic goal and common messaging.
- Collectively impact could be transformational across the supply chain creating economic growth, domestic tree growth and growth in net zero contributions.
- 7 Working groups have attracted the involvement of approximately 170 individuals.
- Activity will encourage collaborative funding for key projects.



TIMBER IN CONSTRUCTION ROADMAP THEMES AND WORKING GROUPS

Progress

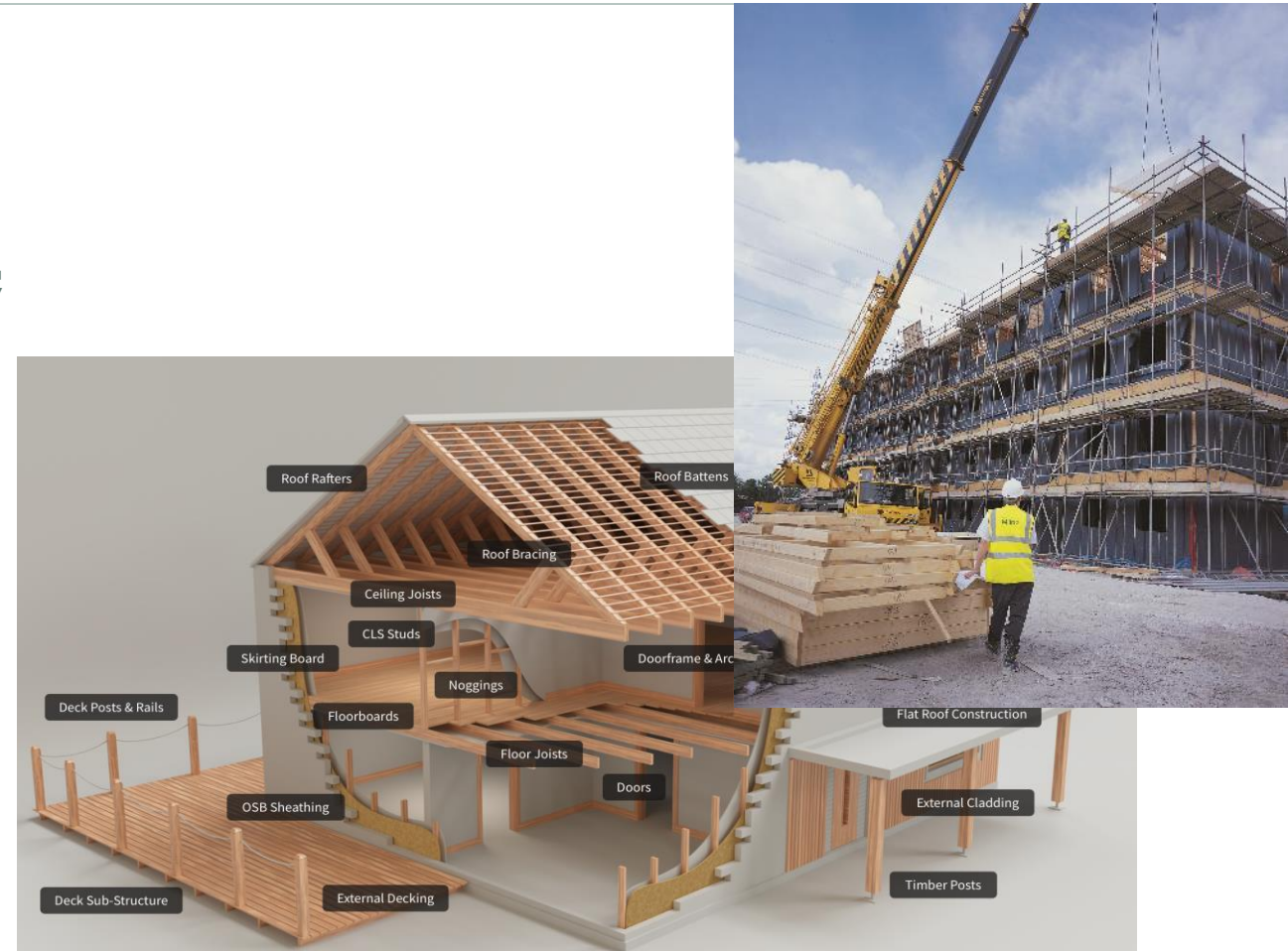
- All working groups have met at least twice.
- Some early wins:
 - **Innovation:** Gen Zero prototypes in place. Ecosystems Technologies and BE:ST increasing capacity for homegrown CLT and glulam production.
 - **Promotion:** Trust UKC16 and Trees to Timber campaigns.
 - **Future timber:** Acceleration of the 50-year wood fibre forecast.
 - **Skills:** Nearly £500k from CITB Impact Fund for skills development and investment through Forestry Sector Skills Plan.
 - **Investment:** Sawmilling, timber frame manufacture and opportunity for £100Ms for conifer planting.
- Progress is reported via [Confederation of Timber Industries](#) website and e-newsletter.
- Trade associations and other organisations will use editorial space to promote outcomes to date and in future.



Opportunities for homegrown softwood products – Construction

TiC Analysis: New Build house starts

- Increasing the timber frame activity in England.
 - **Market share of new build 9% in 2022; Scotland @90%+. Showing increase in recent years.**
- Increased market share in England to 40% results in potential increase in demand in
 - **Graded C16 sawnwood ~1.3M m³** (current GB grading capacity)
 - **Panel board ~ 700k m³.**
 - **Other products?**



Medium term seismic shift

Ref	Homebuilder	No. Homes	Make	Buy
1	Barratt	17,206	1	
	Redrow	5,436		
2	Persimmon	9,922	1	
3	Taylor Wimpey	10,438	1	
4	Vistry	16,118	1	
5	Bellway	10,972	1	
6	Cala	2,917	1	
7	Miller	3,585	1	
8	Bloor	4,252		1
9	Keepmoat	4,074		1
10	Crest Nicholson	2,020		1
11	Lovell	4,788		1
12	Hill Group	2,309		1
13	L&Q	4,047		1
14	Avant	1,801	1	
Note: Berkeley Homes, projects not suitable for TF		99,885	8	6



Future Supply and Demand

Chart 3.4: Forecast Potential Availability and Demand Balance for Coniferous Roundwood in Britain 2022 – 2046

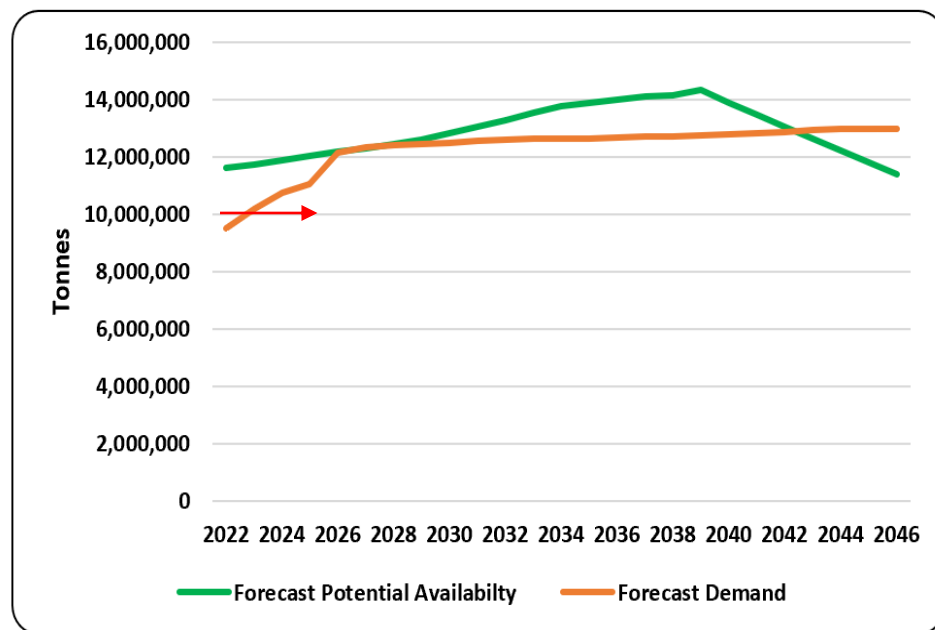
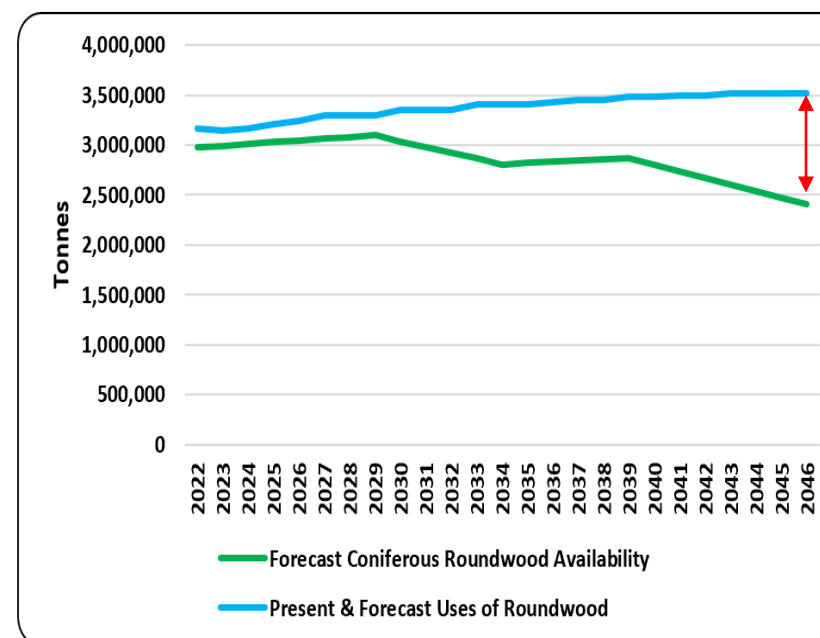


Chart 27.4: England: Comparison of Coniferous Roundwood Potential Availability & Demand 2022 – 2046



Source: Forest Research, 2022 and Survey data

TIMBER IN CONSTRUCTION NEXT ACTIONS REQUIRED SUMMARY

In summary

- There has been great progress across the themes of the TCR25.
- However, there are a few critical actions that require immediate attention to ensure the Roadmap has success and to avoid a serious future timber security issue:
 - We must work collaboratively to agree and execute a clear plan to ensure enough productive conifers are planted **now** to meet future demand(TCR25 ambitions). Is a refreshed ETAP the answer?
 - We need to develop and implement many tools to accelerate an increase in market demand in wood products e.g. in construction. Could building regulation play a part?

