

FORESTRY: 7,000 GREEN JOBS AND LOW-CARBON GROWTH



Douglas fir regeneration at Stourhead Western (image: Jez Ralph)

Introduction

“I want every government department to be a growth department - and all ministers are growth ministers. All of government has a growth agenda, so every avenue of policy is about growing the economy and getting people back to work.” David Cameron on The Andrew Marr Show, BBC1, Sunday 8th January 2012.

The Prime Minister has made it clear that economic recovery and job creation is at the very centre of the Westminster coalition’s programme for government.

This view is shared by Deputy Prime Minister Nick Clegg: ***“The priority should be jobs and growth, jobs and growth,”***

England’s forestry and wood-processing sector can deliver on this jobs and growth agenda – potentially providing more than 7,000 new jobs in deprived rural areas, while reducing carbon dioxide, enhancing biodiversity and offering wider access to woodland for tourism and recreation.

This can be achieved through a combination of bringing more woodland under management, planting more trees and stimulating markets for wood. Crucially, it requires limited public expenditure, representing overwhelming value for money.

All that is needed is the carbon benefits of wood in construction to be incentivised in public procurement, building codes and standards, continued support for local-scale renewable energy, a continued reduction in counter-productive regulation and support for new planting under a reformed Common Agricultural Policy.



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The potential of the forestry sector

Coincidentally, research by the Forestry Commission shows a strong correlation between the location of privately owned woodland and rural deprivation, representing a great opportunity – see Annex 1.

While existing forestry-related activity is important in these areas, supporting fragile communities with few other sources of employment, there is potential to do much more. Forestry can succeed in revitalising rural economies where other measures have failed - a 'Heineken solution', refreshing the rural parts other sectors cannot reach.

Forestry is well-suited to making a long-term economic impact in rural areas: many businesses are small or medium-sized enterprises¹, often family-owned and with strong roots in local communities.

In addition, forestry can make a tremendous positive environmental impact. Growing trees sequesters carbon, and wood products lock that up, as well as, replacing more carbon-intensive materials in construction. At end of life, this wood can be burned for renewable energy, alongside wood sourced from currently unmanaged woodland for local-scale heat and power provision.

Forestry is an ideal sector to help fulfil the coalition government's clearly-stated aim to promote green industries².

Forestry is unique in that increased economic activity also delivers enhanced environmental benefits. In many other sectors, the converse is true, with more economic activity generally having a negative impact on the environment.

Environmental NGO the Woodland Trust has said³: ***“More woods bring more benefits. The case is strong because woods don't just provide single benefits – they bring a package of many environmental, social and economic benefits.”***

While more managed woodland creates significant economic and employment opportunities, it also brings with it a raft of additional benefits, including more biodiversity, more opportunities for public access, and greater carbon benefit. More wood being processed means more employment and less carbon in the atmosphere.

This paper focuses on employment related to woodland establishment and management, and the production and processing of wood. This is because these activities provide the greatest employment numbers, because there is data available to work with and because this is where the real scale of opportunity lies for green jobs.

Further job benefits come from forest-based tourism - a 2003 study estimated that tourism day visits to forests contributed more than £2 billion to the English economy⁴, and sporting estates and the game shooting they support contributes around £640 million to the UK economy annually⁵.



Forestry and employment – the numbers

Forestry is not alone in using a number of different figures for employment. The dispersed and rural nature of forestry makes it difficult to be absolutely clear about numbers, and there are several definitions of 'forestry'.

The Forestry Commission's published figures estimate employment in forestry and primary processing in the UK at 40,000 in 2009 (derived from 2008, the latest business survey statistics available). In recent years, the number of jobs in 'pure' forestry in the UK has risen from 12,000 to 14,000⁶. Using the proportions from Forestry Commission Employment and Business statistics, England represents about 50 per cent of the UK total – so around 20,000 jobs in forestry and primary processing and around 7,000 in forestry alone are a baseline for the sector in England.

Some much higher employment figures are quoted, reflecting the inclusion of secondary processing and the manufacture of wood products – a cebr report in 2005 suggested up to 727,000 jobs were supported by the forestry industry across the UK, an indication of the scope and significance of the sector.

Potential for growth: the big picture

The forestry sector has experienced growth since 2009 and the feeling in the sector is that current UK numbers are broadly in line with the Forestry Commission's 40,000 jobs figure. However, as emphasised by David Cameron's comments in the introduction to this paper, the focus now is not on where we have been – or where we are – but on where new employment and growth can be found.

There is no specific recent literature looking at job projections across the forestry sector as a whole, so what is the potential for growth and how do we identify it?

First, there is genuine optimism in the sector that the opportunities to increase employment in the next few years are good – "at the very worst, business as usual" is how one analyst describes things. The sector has weathered the economic storm relatively well, due in no small part to the weakness of the pound compared to the countries from which the UK imports its timber - Finland, Latvia and Sweden account for about 70 per cent of the volume of timber imports to the UK⁷. Economic forecasts all suggest the pound will remain weak.

The market for English round wood is relatively buoyant. The Forestry Commission standing sales index⁸ indicates a 35 per cent price increase in real terms in the year to March 2011 compared with the previous year. The wood-processing industry is relatively positive about the medium-term prospects, with a predicted healthy demand for timber in 2012⁹.

At the moment, 70-80 per cent of UK timber (and products) consumption is imported, with a value approaching £7 billion, so there is a big opportunity for substitution. Capturing just a small proportion of this would have a significant positive impact on the industry, and on the balance of payments.



Extracting hardwood logs.

Bringing woodland into management delivers jobs and much more.



It is estimated that the value of the growth of the forestry industry in recent years has displaced the equivalent of around £1 billion of imports annually, with further expansion opportunities available¹⁰.

There is certainly timber available in England to increase supply to domestic markets significantly – a report in 2006 suggested less than 40 per cent of England’s annual timber increment is harvested¹¹.

There has been a gradual increase in the timber harvest in England over the last five years¹², largely due to increased wood-processing activity and the ability of the English processing industry to displace foreign imports. However, there is still timber available in unmanaged woodland, both softwood and hardwood and this could find new, sustainable markets. This is where the big opportunities for employment lie.

Potential growth areas: woodfuel

The area with greatest growth potential is woodfuel, or more accurately, the increasing use of wood as a renewable energy source. This falls into three broad categories: the growing firewood market, largely for domestic use; the wider woodfuel market, including chips and pellets for small to medium-sized biomass boilers, often combined heat and power (CHP) boilers; and the contentious area of large-scale biomass boilers for electricity generation.

Small to medium-sized, local applications of biomass boilers are much more efficient (generally estimated at around 90 per cent) than large biomass plants producing electricity only, which generally run at around 30 per cent efficiency – consequently, smaller boilers have the greatest relative carbon benefit. They also offer additional benefits to the local economy, creating both a local heat supply and more jobs, because the raw material is sourced locally and helps to create supply chains in the area.

It is expected that large electricity biomass boilers will displace other businesses rather than

create new opportunities. They could destroy jobs and have a negative carbon impact through displacing more carbon-efficient uses of wood.

New firewood markets have been described as ‘a saviour’ to smaller woodlands producing hardwood, which have struggled to find markets in recent years. Installations of wood-burning stoves have increased rapidly, fuelling an increase in hardwood production from 384,000 green tonnes in 2006 to around 470,000 green tonnes in 2010¹³.

Prices for lower grade hardwoods in England have risen substantially over the last five years, which has helped stimulate increasing woodland management as the economics of forestry become more attractive for owners. This also encourages the necessary operations to produce quality hardwood timber in the future.

Potential growth areas: wood-processing

There is optimism in the sector that forestry and wood-processing has performed well during very challenging economic times, and that a future upturn in struggling sectors, such as construction, will have a positive jobs impact.

According to one respected forest analyst: “Forestry has held its own while the construction market has struggled and there are significant market opportunities when that sector picks up again. It would not be unreasonable to see volumes of timber being harvested from woodlands in England and going into the processing sector to rise by about 20 per cent.” Other analysts put the potential increase considerably higher and an average increase of 30 per cent – an additional 750,000 tonnes on a baseline of 2.5 million tonnes harvested annually - is used in this report.

Wood is increasingly popular in construction and other purposes. It is versatile, attractive, infinitely renewable and recyclable.





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There are also positive technological developments that are offering new and diverse markets for wood and wood fibre, for example using low-value wood in cross-laminated timber (softwood glued in layers to create strong timber for construction). The market for home-produced wood is far greater than the country's capacity to supply, meaning the only limits on growth are competitiveness and supplies of wood.

*Cross-laminated timber panels being used in construction.
Image: Peter Wilson, Napier University.*



The extraordinary carbon properties of wood make it an obvious material for low-carbon construction. There are political drivers from Europe, and internationally, that have incentivised the UK government to encourage the use of home-grown wood in construction.

Unmanaged woodland

Unmanaged woodland is a real problem in England. Forestry Commission figures suggest there is around 1.3 million hectares of woodland in England, made up of 214,000ha under the control of Forestry Commission England (FCE) and 1,083,000ha non-state woodland¹⁴.

FCE data indicate that 52 per cent of woodland was in 'active management' in September 2011. This equates to just under 675,000ha in management – leaving more than 600,000ha of woodland unmanaged in England.

Growth in markets for woodfuel and wood in construction will help release the massive potential in England's unmanaged woodland and create more jobs in our woods and forests.

As Confor's paper ***Forests and Financial Sustainability (2011)***¹⁵ states: "While there can be many reasons for the lack of management, by far the main obstacle is funding and the 'wood that pays is the wood that stays' maxim can be extended to include responsible management. If a forest costs money to manage and there is no income, especially in the immediate or short-term, a woodland owner is unlikely to take care of the forest." The 2010 cebr report supports this view: "Currently under-managed woodlands are more likely to be



brought back into sustainable management when there is a commercial incentive to do so”.

Potential growth areas: woodland establishment

Woodland covers less than 10 per cent of the land surface of England, well below the UK average of 13 per cent and one of the lowest percentages in Europe. The average across the EU27 member states is 37 per cent.

There is significant potential to increase the proportion of forest cover through the establishment of new woodland, and in turn to deliver a major increase in the economic and employment contribution of forestry. New planting should be regionally sensitive. Planting productive conifers for low-carbon business growth and green jobs is likely to take place in areas such as north and south-west England and the Marches (along the English-Welsh border), whereas planting broadleaves primarily for recreation and health is particularly important near towns and cities. In practice, most woodland can and should have a mixture of broadleaves and conifers.



The landmark report by Sir David Read¹⁶ in 2009 highlighted the significance and cost-effectiveness of woodland establishment (by creating carbon sinks) – as well as the subsequent making of wood products (which act as carbon stores) – in helping to reduce carbon dioxide.

The Read Report said: “Measurements in a coniferous forest in Scotland show average annual removal from the atmosphere of around 24 tonnes of CO₂ per hectare per year. Comparable measurements made in an oak forest in southern England indicate that it removes 15 tonnes of CO₂ per hectare per year.”

Therefore, if an additional 10,000ha of woodland were planted annually (the 10,000 figure is achievable, and used later in this report), this would remove between 150,000 and 240,000 tonnes of CO₂ from the atmosphere per year, depending on the type of woodland.

A study by Forest Research is more cautious, putting the maximum rate of carbon accumulation during the peak growing phase of commercial woodland at around 10 tonnes of carbon per hectare per year (tC/ha/yr), but cautions that “a realistic average over a full commercial rotation may be no more than 3tC/ha/yr”.¹⁷

The accepted conversion rate from carbon to CO₂ is 3.67, so 3tC/ha/yr equates to 11tCO₂/yr. Therefore, even using this most cautious of estimates, planting 10,000ha of new woodland would take out 110,000 tonnes of CO₂ - and possibly much more according to the (more recent) Read calculations.

This reinforces the twin economic and environmental benefits of forestry and the unique nature of the sector – but how can the economic and more specifically, the employment, benefits of woodland establishment be calculated?

Before looking at this in more detail, it is important to stress that any new woodland created must be financially sustainable in perpetuity. Confor highlighted this fundamental point in a discussion paper in 2011¹⁸. Its introduction said: “When forests are actively managed in a sustainable way, it helps realise their potential and delivers a diverse range of benefits – for the economy, the environment, for recreation and for biodiversity.

“UK forests have been subject to human intervention for thousands of years, and it is their continued usefulness, in particular as an infinitely renewable supply of wood, that has helped ensure their survival. Oliver Rackham’s maxim “The wood that pays is the wood that stays”, is well known in forestry circles - we have woodland because someone has placed a value on it. While responsible management is beneficial, it has to be paid for. Harvesting trees, providing facilities for visitors and protecting wildlife all have a cost. Addressing this point is at the heart of sustainability.”

Creating new green jobs

There are no agreed methodologies for calculating the impacts on forestry job numbers of a percentage increase in the establishment of new woodland, or the area of forest under management, or the quantity of timber produced. Apart from the section on woodfuel, where numbers are taken from previous research, this section of the paper applies simple methodologies to a range of scenarios, to produce a conservative estimate of job numbers that might be created. The methodologies were agreed to be reasonable by several members of the forestry community contacted during the preparation of this paper.

New green jobs: woodfuel

A key report produced by cebr in 2010¹⁹, says the development and growth of the local woodfuel resource could lead to the creation and support of 15,300 jobs in the UK economy by 2020, through direct and indirect effects.

Demand for traditional hardwood firewood logs, as well as, modern woodchip and pellets, has increased dramatically as oil and gas prices have proved volatile.



In England, the report estimates that the number of full-time equivalent jobs (FTEs) in direct



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woodfuel production will increase from 256 in 2010 to 782 and that the number of indirect jobs within the sector will rise from 270 to 826 FTEs – a total increase of 1082 jobs.

The cebr report also looks more widely at the potential for further jobs created by the “production and supply of woodfuel energy, including the transformation (via combustion), conversion and application of energy produced from woodfuel, including investment in woodfuel energy installations, such as boilers”.

The report says: “The incomes of direct and indirect employees will stimulate final demand in the wider economy, generating spillover employment effects”. A diagram on page 19 of the report shows the enormous range of jobs available.

Indirect jobs supported in other sectors by demand from growing woodfuel energy production and boiler plant manufacturing are estimated to rise in England from 2058 in 2010 to 6238 by 2020 – a rise of 4180 FTE jobs. However, this includes all manufacture of biomass plant in the UK, which will not happen. A second calculation, based on none of the biomass plant being manufactured in the UK, suggests a smaller increase of 1286 indirect jobs. For the purposes of this report, we have taken a midpoint between the two increased figures of 2894 FTEs. Added to the 1082 direct and indirect jobs already mentioned, this gives a total of 3976 new FTE jobs that could be created by the growing woodfuel industry in England.

There are a number of examples of local projects looking to stimulate woodfuel markets – such as the Kent Downs Woodfuel Pathfinder. It is described thus: “The aim is to establish markets for locally grown wood, which will bring local woods into management and provide new habitats for wildlife. The scheme will also support the creation of ‘green’ jobs and new opportunities for people to get involved with their local woodlands through enterprise and conservation.”²⁰

The above quote, and the project, remind us again that green jobs in forestry are not just about economic benefit. This is also highlighted in FCE’s Woodfuel Strategy for England, which says that bringing an extra two million tonnes of biomass to market, annually, by 2020 will provide an opportunity to reverse the decline in woodland biodiversity by increasing the number of sustainably managed woodlands.²¹

The woodfuel report by the cebr is the only detailed analysis of the jobs potential of the forestry sector. The remainder of this report uses the best methodology available to calculate potential in other areas, while recognising the paucity of information and projections available.

New green jobs: more timber milled

With the positive conditions for forestry outlined earlier, there is also potential for enhanced job numbers by increasing the volume of timber milled from English forests. A PACEC report²² of 2000 for FCE suggested that increasing the timber harvest by 50 per cent would add 3,900 jobs and £270m to GDP, while a 20 per cent import substitution would create an additional 1,500 jobs.

Although the data are more than ten years old, the methodology of the PACEC report is still



accepted as robust. If we apply it to the estimate of a 30 per cent rise in timber volumes, if key economic areas like construction pick up, we see enormous employment potential. This estimate is not unreasonable, according to many analysts - given the increasingly favourable conditions and rapidly emerging, growing markets.

If we suggest that volumes could increase by around 750,000 tonnes, on a baseline of 2.5 million tonnes currently produced, then the following scenario is potentially achievable: The PACEC report suggests that a 50 per cent increase in the timber harvest could create 3900 jobs. This was calculated at the time using a baseline of 34,100 jobs - and 3900 new jobs represent an 11.44 per cent increase in employment.

So if a 50 per cent increase in timber volumes leads to an 11.44 per cent rise in employment, then a 30 per cent increase in volumes could reasonably be assumed to equate to a rise of three-fifths of that – a 6.87 per cent increase.

If we are working from a baseline of 20,000 forestry jobs in England (FCE figures, page 3), a 6.87 per cent increase would equate to around 1400 jobs. Again, we are looking broadly here at the period to 2020.

New green jobs: woodland establishment

Confor research carried out in 2009 offered some indication of what might be achieved by an increase in woodland establishment. It used two baseline figures – the creation of 10,000 ha of new woodland per year and the creation of 15,000 ha per year – and assumed that around 60 per cent of the new planting would be productive softwood.

All the background information used to calculate the 'best estimates' was based on the experience of real forest businesses and works with the following assumptions:

- conifer planting at 2,500 trees/ha (broadleaves at 1,100/ha)
- conifer planting of an additional 6,000ha (year 1) = 15 million trees
- broadleaf planting of 4,000ha = 4.4 million trees
- average planting rate of 1000 trees/man day = 19,400 man days working year (240 days) = 81 jobs

Container-grown conifer seedlings.

Nurseries would welcome an increase in planting, but they need notice to increase production.





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The number of 'support jobs' required – to erect fences, construct roads, prepare the ground and to provide management and business support, for example - would approximately match the planting jobs, according to companies engaged in this type of work.

It is estimated, therefore, that planting 10,000ha per year would require somewhere between 130 and 170 additional jobs. In addition, there would be work to tend and nurture the newly planted trees, which might bring the total to 250 jobs.

New green jobs: bringing more woodland under management

The effect of an increasing market for wood in construction and local renewable energy will be to increase the area of woodland in positive management, discussed above. However, there is scope for action to bring woodland into management for personal wood supply and other activities, such as improved biodiversity, recreation, health and tourism. The area of woodland available to bring into management can only be estimated.

FC figures (March 2011) suggest there is around 1.3 million ha of woodland in England. This is made up of 214,000ha under the control of FCE and 1,083,000ha of non-state woodland.²³

FCE data indicate that 52 per cent of woodland was in 'active management' in September 2011. This equates to just under 675,000ha of the 1.3 million ha total under management. If we assume that 100 per cent of FCE woodland is under management, there is around 460,000ha of other woodland under management (675,000 minus 214,000ha controlled by FCE). This is admittedly very much a best guess.

In an attempt to assess jobs potential across the whole sector, we can look at the employment in woodland management. FC 2008 statistics²⁴ on employment in management identify 5,600 jobs. Therefore, if 675,000ha is under management, this equates to one job per 121ha or 830 jobs per 100,000ha.

So if we have 600,000ha of woodland that are not managed, this could in theory equate to almost 5000 new management jobs if all of that woodland were brought into productive use (830 jobs per 100,000ha x 6 = 4980 jobs for 600,000ha)

However, it is clearly not feasible for all unmanaged woodland to be brought under management, so we have taken a much lower figure of 200,000ha brought into management in the period to 2020 – so the figure suggested is 1660 jobs. This is ambitious, but the potential is there – and new tools, such as, myForest (see Annex 2) are starting to raise awareness and interest in the enormous possibilities and benefits of bringing woodland under management.

7,000-7500 new jobs: an achievable target

The above analysis offers a range of suggestions about the potential to create new green jobs in the forestry sector.



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If we look at all four areas mentioned, we reach the following jobs potential in the period to 2020:

Development of woodfuel industry – direct and indirect jobs	3976
Increased processing of timber – direct jobs	1400
New planting – direct jobs	250
Increased management of woodland - direct jobs	1660

This gives a total of just under 7,300 jobs. An attempt has been made to avoid ‘doubling up’ between the different categories and they do not include ‘multiplier effects’ of increased economic activity spilling over into other sectors of the economy, such as secondary production. None of the calculations of the new jobs that might be created as a result of processing more timber, new planting and increased management take into account indirect job benefits; only the woodfuel section does this, because that is the only area where detailed work has been done. In addition, as already noted, no increase in forest-related tourism or employment growth on sporting estates has been included.

More than 7,000 new jobs is an impressive number, especially in areas of relatively high unemployment where traditional means of stimulating economic growth struggle to make an impact – and as stated above, the positive knock-on effects on fragile rural economies have not been taken into account.

What is needed to deliver 7,000 green jobs?

The potential for forestry to deliver an ‘easy win’ for jobs, the wider economy and the environment is clearly there. However, this will only happen if the right conditions are created for the sector to flourish.

Forestry is a long-term business - trees take 40-100+ years to reach maturity, and confidence in the future is vital. The policy and regulatory framework surrounding forestry needs to respect and reflect these long timeframes.

As Confor said in its paper²⁵, *Are we managing our forests responsibly? Are we delivering their full potential?* published in August 2011: “Government has a hugely important role to play in protecting our forests and promoting opportunity by providing a stable and high-quality framework, rooted firmly in a long-term view”.²⁶ Policy-making needs to avoid repeated changes to short-term incentives, and instead it should analyse all proposed policies through the lens of long-term financial sustainability.

It is important not to strangle forestry with bureaucracy, as this undermines biodiversity and carbon benefits as well as jobs. There have been encouraging signs that this is understood at the highest levels of the coalition through support for Confor’s call for an exemption for forestry from onerous Gangmaster Licensing Authority regulations that demonstrate no benefit, but damage rural employment, as well as the government response to the Forestry Regulation Task Force recommendations.

The Renewable Heat Incentive is having a positive impact and this should continue alongside a reduction or removal of support to burn English wood in large electricity



biomass plants.

Government can do more to stimulate the use of wood in construction ahead of less green materials, the potential of which is highlighted earlier in the report. A 'Wood first'²⁷ rule could be adopted whereby builders should be expected to use wood ahead of other materials, where appropriate. Wood should also be more effectively incentivised in sustainability codes.

A tonne of bricks needs four times the energy to manufacture and supply it to the point of use than the same amount of sawn softwood. This rises to six times more for glass and 24 times more for steel. Every cubic metre of wood used instead of other building materials saves between 0.7 and 1.1 tonnes of carbon dioxide²⁷.

New planting can be financed through carbon trading, though this is currently insufficient in many cases. Support for new planting, and for managing woodland can be co-financed by the EU through the rural development arm of the Common Agricultural Policy.

In the current economic climate, it is clear that the government cannot pump money into forestry. However, the investment to achieve at least 7,000 jobs is likely to be less than £20m per year for the next eight years, the bulk of that on new planting and co-funded by the EU through CAP. These figures are based on internal Confor research for a draft policy paper.

Conclusion

This paper highlights a massive opportunity for the forestry sector to deliver on the government's green jobs agenda, and on the wider environmental, social and recreational benefits that could flow from that.

It also highlights that the mechanisms needed to deliver this agenda are very much achievable. They do not require major investment, and they are within reach. A sensible, coherent and joined-up approach to forestry can deliver a wide range of benefits - including significant employment growth at a time when new jobs are badly needed to stimulate economic growth.

The conditions for job creation in forestry are favourable due to the weak pound and the emergence of new markets, especially in the woodfuel sector. These new markets are improving forestry economics and driving an increase in woodland management. This drive to increase forest management is helped by initiatives like the Woodfuel WIG and myForest project (see Annex 2).

However, the potential for new jobs reaches far beyond woodfuel: new markets afford wider opportunities for strategic planning to bring far more forests under management and puts the sector in a favourable position for an economic upturn in sectors like construction that have struggled in the last few years.

While the exact employment potential across the whole sector is hard to assess, the broad direction – of the area of woodland under management, of timber production and of jobs



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potential - is very clearly upwards, and 7,000 or more new jobs, largely in rural areas, appears achievable.

These are jobs that can help to transform areas of rural deprivation – and jobs that have a strong environmental value. The phrase ‘green jobs’ can be over-used, and is often utilised in a very loose sense, but these really are green jobs, with genuine added value for the economy and environment, and the ability to deliver the broader ‘ecosystem services’ agenda.



To grasp this enormous opportunity, England needs a vibrant forestry sector which has a guaranteed, long-term supply of timber. As Confor’s paper on forest management put it: “Wood is an infinitely renewable resource and harvesting and re-planting trees is part of a virtuous cycle that can ensure better management for all England’s forests – and allow them to reach their true potential and deliver a myriad of benefits”.²⁸

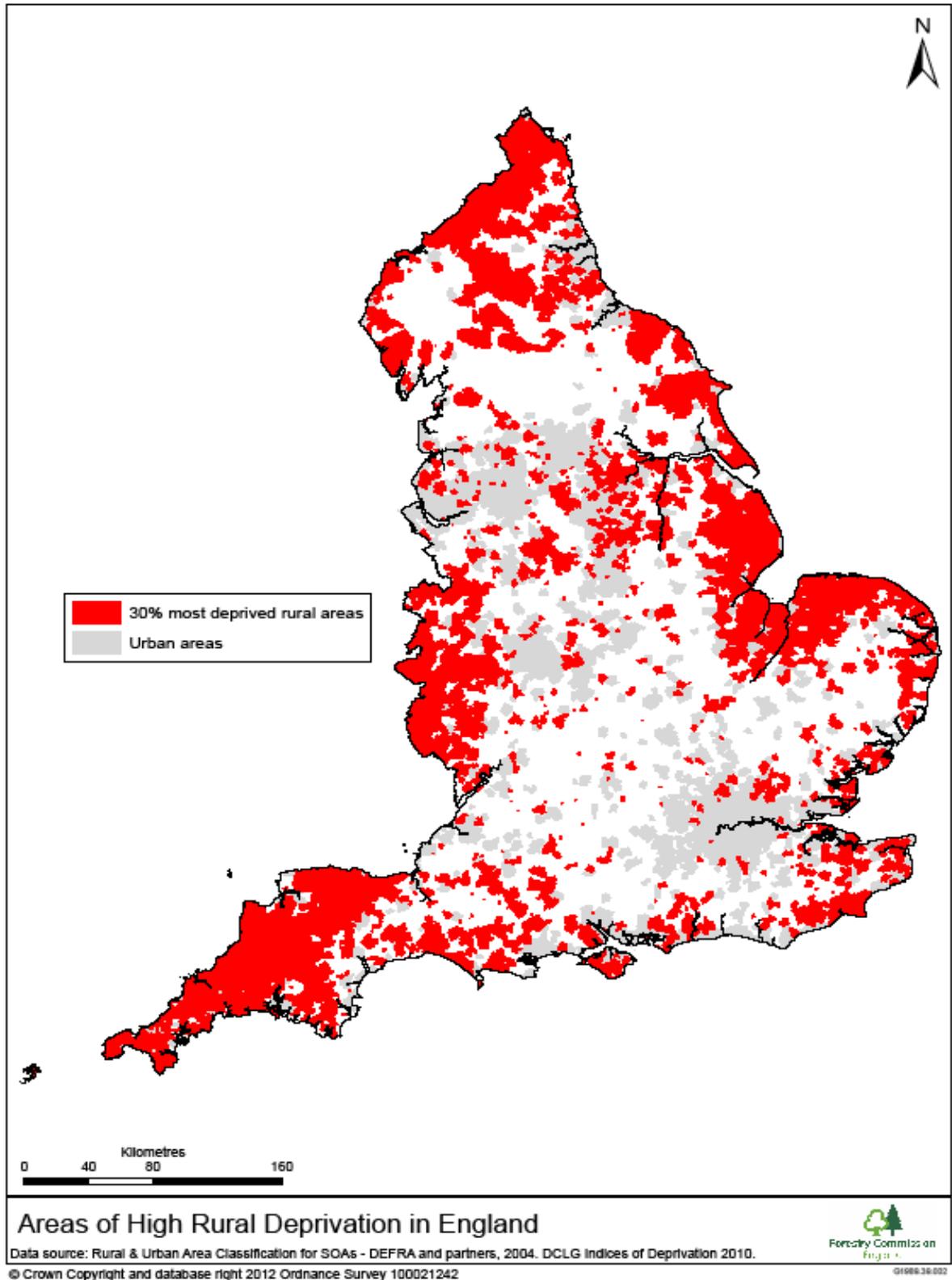
It is also worth pointing out that while this paper refers to opportunities in England, the forestry sectors in Scotland and Wales are strong and significant and there is real potential for the industry to deliver green jobs and green growth across the whole of the UK.

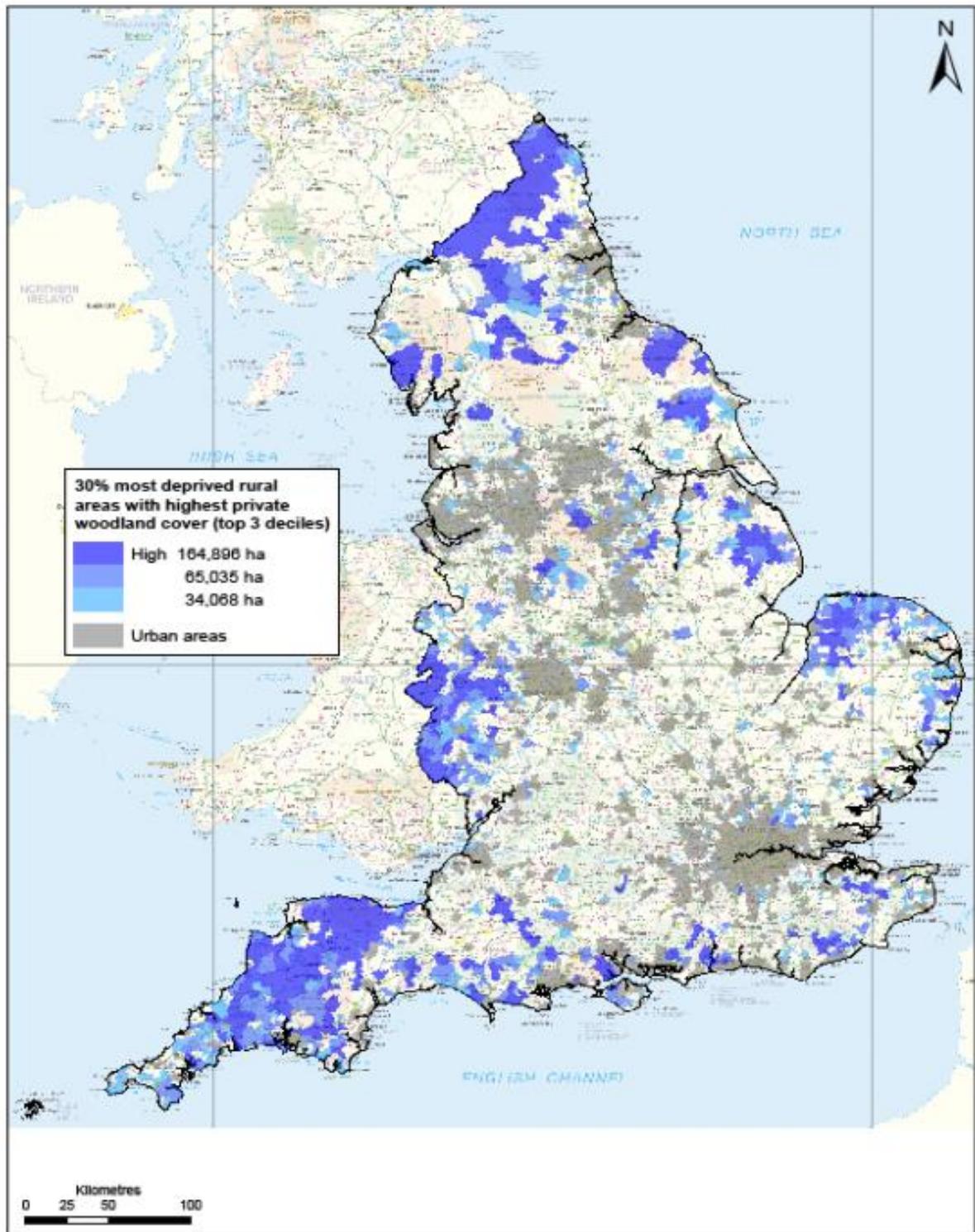
In conclusion, forestry is in an exceptionally strong position to deliver on the jobs agenda at the heart of the Westminster Government’s strategy, at a time when the country most needs sustainable employment. The right conditions and the significant opportunities are there - if we have the courage to take advantage of them.

Confor, June 2012

Annex 1

DEPRIVATION/FOREST COVER MAPS





Areas of High Rural Deprivation with Highest Private Woodland Cover

Data source: Rural & Urban Area Classification for SOAs - DEFRA and partners, 2004. DCLG Indices of Deprivation 2010.

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England

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Annex 2

Delivering more management and wood supply

The recent Woodfuel WIG (FCE Woodland Improvement Grant) is an important new approach. It is the first significant WIG to have an economic focus. Previous WIGs have been related largely to biodiversity and public access, but this one is focused on bringing a certain volume of timber out of a forest over a specified period. The £10 million pot can be used to help fund new roads and access points to bring timber out of a previously under-managed forest, and the three-year scheme is focused on the south east, south west and Cumbria. Again, this scheme offers real potential to kick-start bigger and more valuable markets.

An ongoing project to bring more woodland back into management is myForest, supported by a number of organisations, including Confor. (myforest.org.uk)

This is an attempt to map unmanaged forest - and give owners a range of tools and opportunities to bring woodland into management. In January 2012, myForest passed a significant landmark of 10,000ha mapped by almost 500 owners across the UK, the vast majority of them in England. <http://www.sylva.org.uk/myforest/blog.php?post=2455>

As well as mapping woodland, myForest offers information and advice on sustainable forestry and different income sources, including grants – as well as information on licences and the wider benefits of sustainable forestry, including carbon reduction, biodiversity and social/recreational benefits. It aims to smooth the path between woodland owners and the FCE – and to encourage management by making grants more accessible, thus raising management to the UK Forestry Standard and for certification.

Paul Orsi, Rural Enterprises Manager for Blenheim Palace, says of myForest: ***“It has the potential to be a major step forward in the regeneration of our woodland management culture”.***

The myForest project also aims to link woodland owners to potential markets by mapping where different kinds of wood are available, and creating a database to allow wood-users to search for products they need. The aim of myForest is to address this, and even a small success in bringing woodland back into management could have a substantial impact on improving both employment numbers, and the balance of payments.

With an estimated 90,000 forest owners across the UK, myForest has a long way to go, but it is an important project in creating the right environment to increase woodland management – and in so doing, deliver new jobs.

Annex 3

Footnotes

- ¹“Businesses ... have a smaller than average business size; 94 per cent have a workforce of fewer than ten staff, compared with 83 per cent across all businesses in the UK.” Lantra, the Sector Skills Council for the Land-Based and Environmental Industries.
- ² Enabling The Transition to a Green Economy: government and business working together, August 2011. <http://bit.ly/x8YzYO>.
- ³ Confor submission to the Independent Panel on Forestry.
- ⁴ Forests' Role in Tourism, The Macaulay Institute, 2003.
- ⁵ Shooting Sports: Findings of an economic & environmental survey, PACEC 2006.
- ⁶ Forestry Statistics 2011 - Employment & Businesses [online] available at: www.forestry.gov.uk/website/forstats2011.nsf/LUContents/D881D5834408C7C08025734E00312F0A
- ⁷ Forestry Statistics 2011.
- ⁸ Timber Prices Indices - Data to September 2011 <http://www.forestry.gov.uk/website/forestry.nsf/byunique/infd-7m2djr>
- ⁹ UPM Tilhill Timber Bulletin 2011.
- ¹⁰ Source: Confor calculation, used in policy papers on website, www.confor.org.uk 2011.
- ¹¹ Jaakko Poyry Consulting (2006). Woodland and Forest Sector in England, mapping study.
- ¹² Forestry Commission (2011) UK Wood Production and Trade.
- ¹³ Forestry Commission (2011) UK Wood Production and Trade.
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