

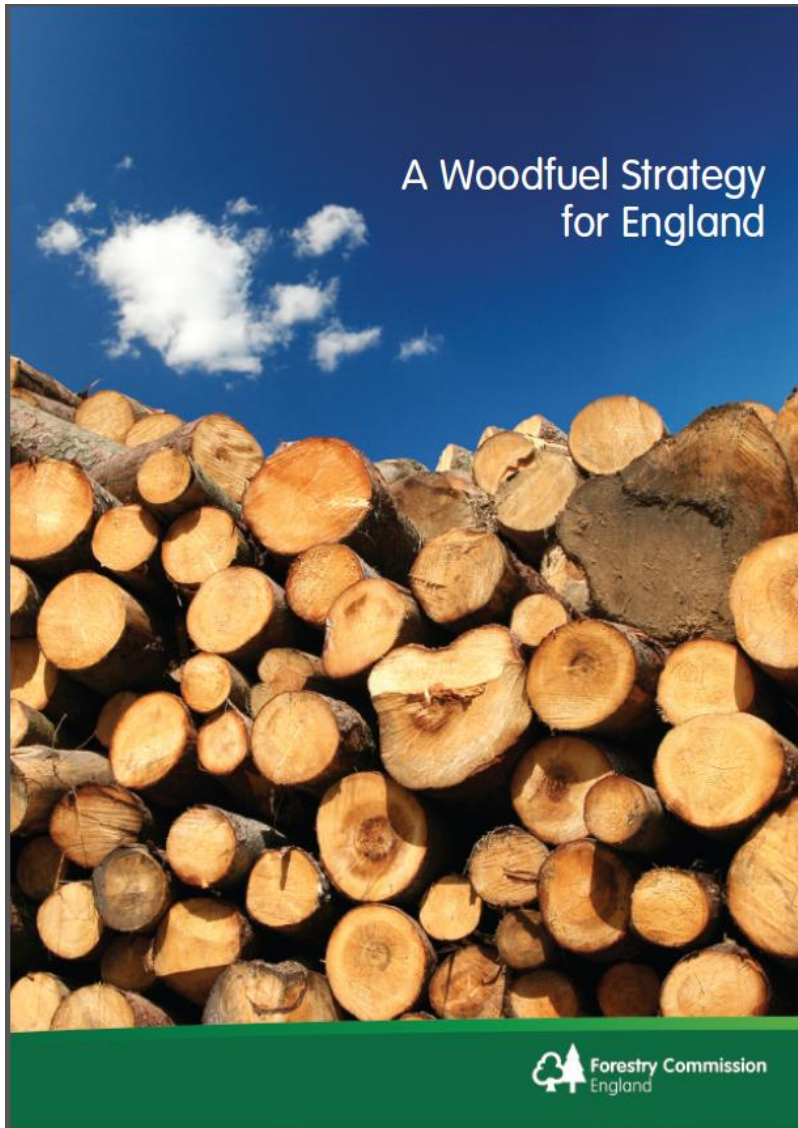
Forestry and bioenergy

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Forest Services

24/02/2020

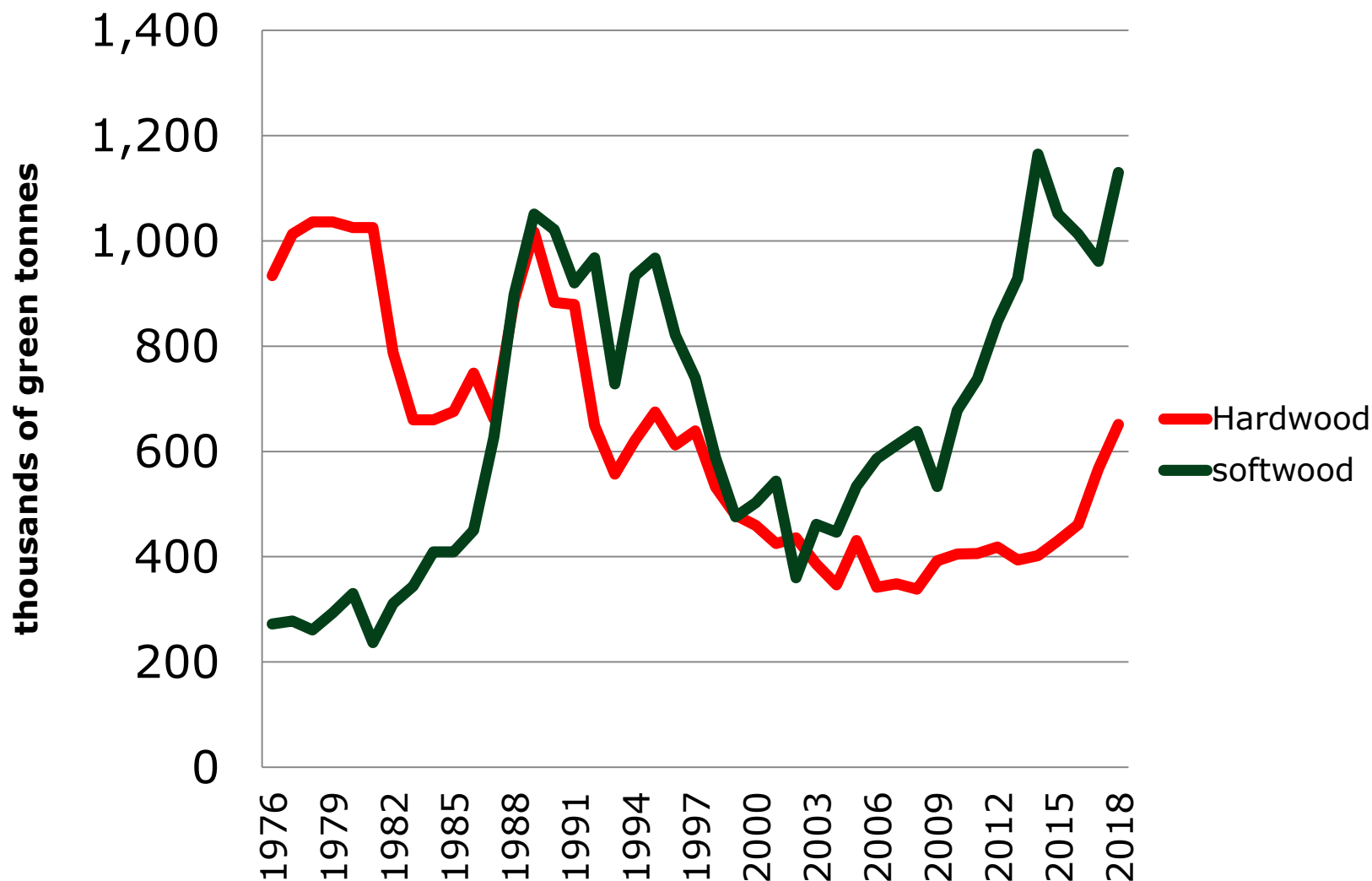
- Hardwood deliveries up?
- Softwood deliveries up?
- Employment up?
- GVA steady?
- Timber prices up?





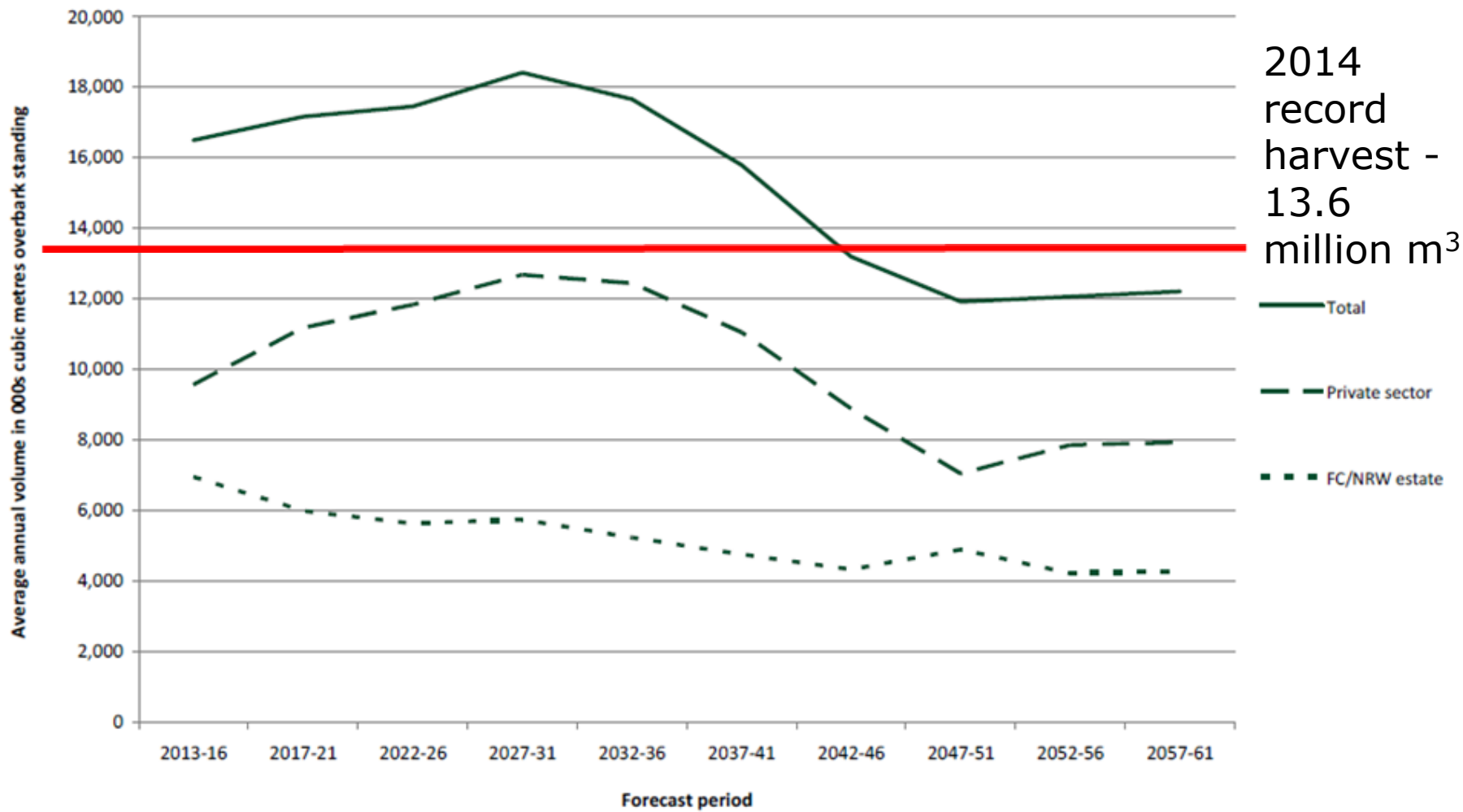
...bring an additional 2 million tonnes (Mt) to market, annually, by 2020...supported by other sources such as arboricultural arisings and recovered wood.

Timber deliveries in England



UK softwood deliveries (thousands of green tonnes)

Year	Sawmills	Woodbased panels	Woodfuel
2008	4,933	1,219	300
2009	5,133	1,135	650
2010	5,616	1,375	900
2011	5,859	1,417	900
2012	6,073	1,269	1,000
2013	6,407	1,263	1,250
2014	6,725	1,283	1,500
2015	6,168	1,334	1,600
2016	6,511	1,248	1,550
2017	6,581	1,059	1,600
2018	6,424	1,210	1,900

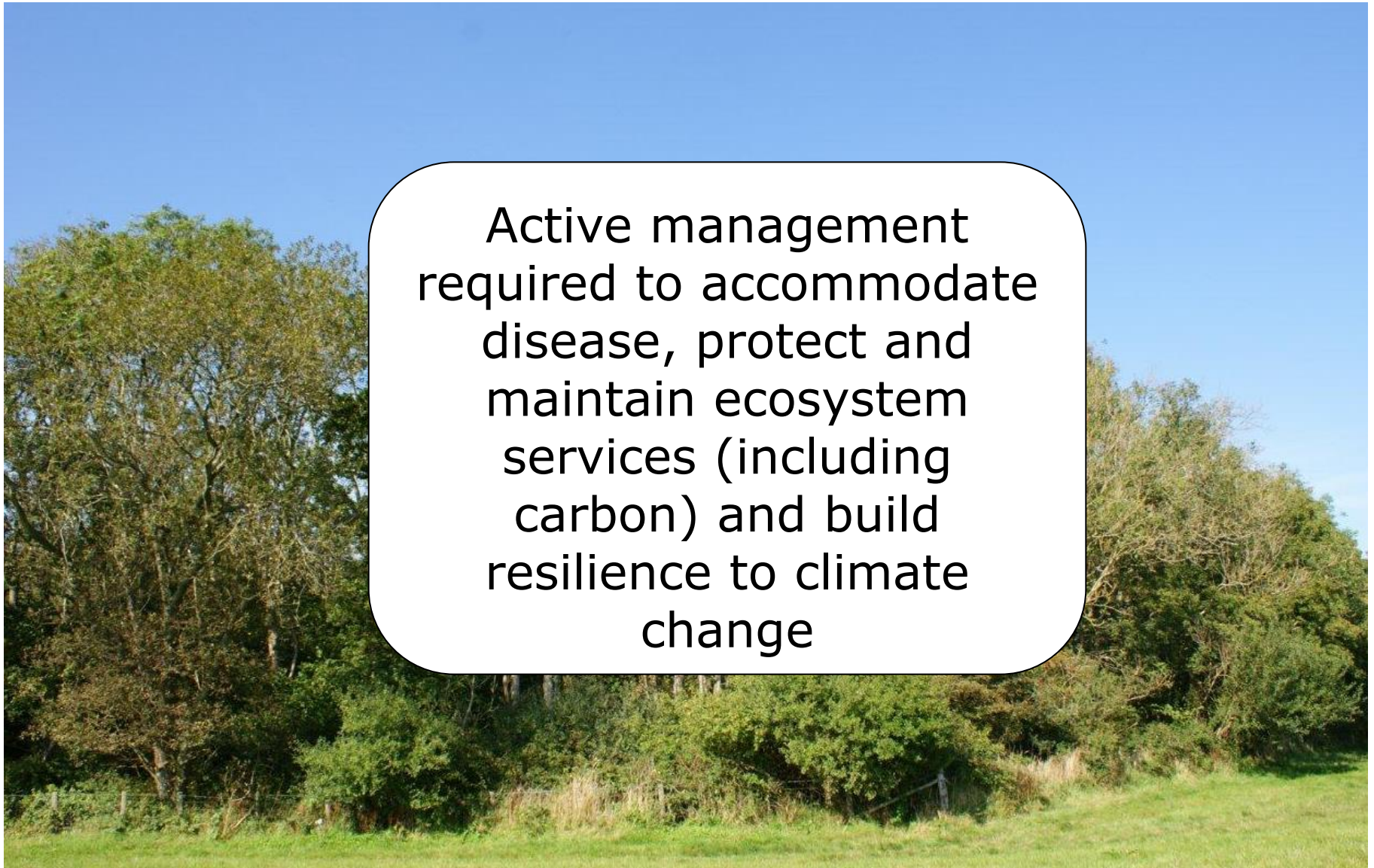


thousand cubic metres over bark standing	
Annual average in the period	England
Total softwood	
2013 - 2016	4,577
2017 - 2021	4,555
2022 - 2026	4,113
2027 - 2031	4,145

2017 softwood production in England 2,499 m³

Timber beyond MMAI

Principal species	Private sector	
	volume (000 m ³ obs)	SE%
South East England		
All conifers	3,541	12
Sitka spruce	41	57
Scots pine	767	32
Corsican pine	118	48
Norway spruce	3	92
Larches	1,231	16
Douglas fir	653	25
Lodgepole pine	0	-
Other conifers	744	27
All broadleaves	28,507	4
Oak	10,194	8
Beech	3,334	17
Sycamore	1,195	18
Ash	6,198	9
Birch	1,903	9
Sweet chestnut	934	28
Hazel	932	14
Hawthorn	24	42
Alder	1,288	18
Willow	78	46
Other broadleaves	2,581	15
All species	31,968	4



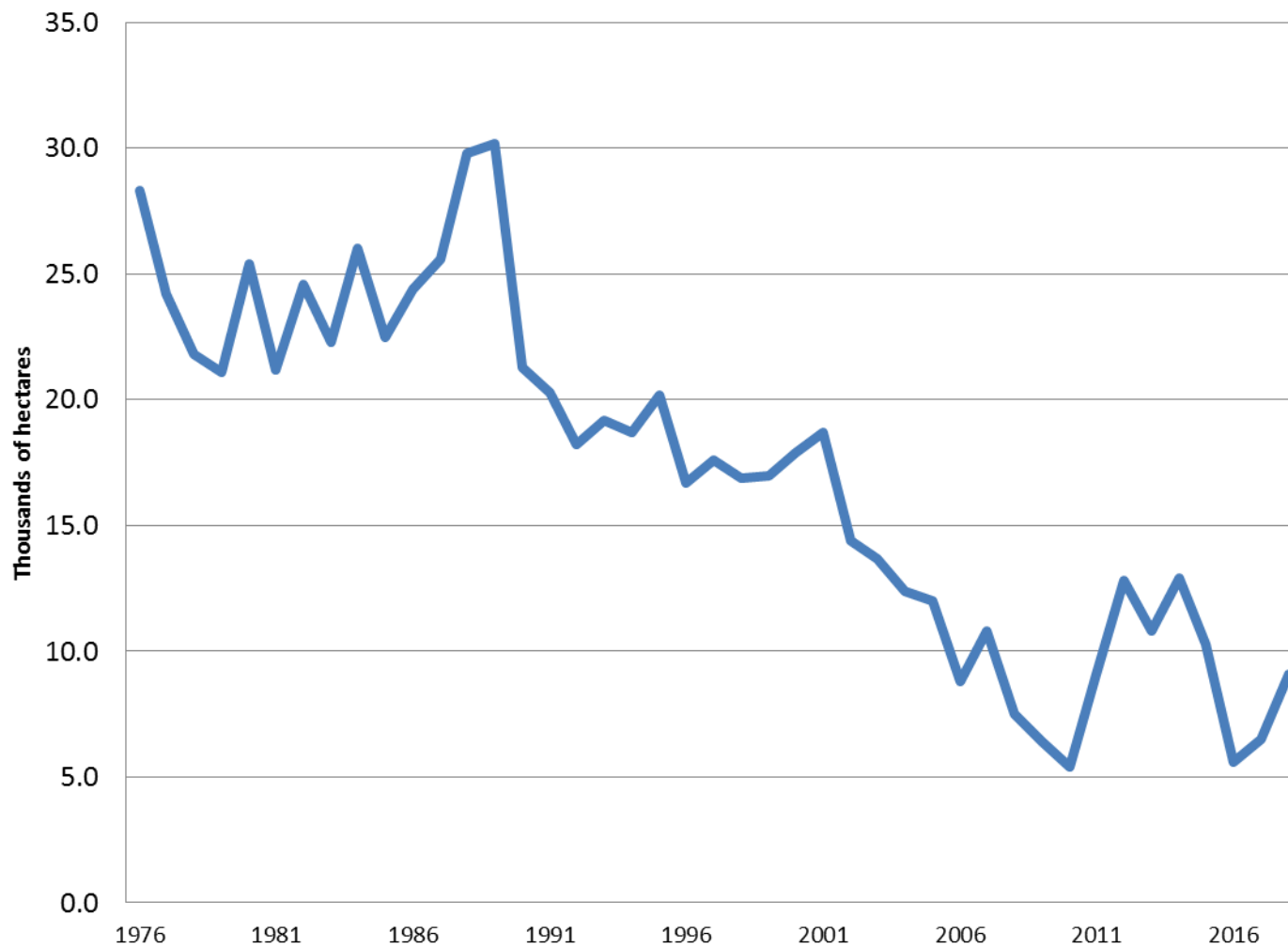
Active management
required to accommodate
disease, protect and
maintain ecosystem
services (including
carbon) and build
resilience to climate
change

Tree diseases





Afforestation 1976 - 2018







- Breeding birds
- Historic environment
- Deep peat
- Social impact
- Water quality
- Landscape/visual impact
- Designated sites
- Roading
- Economic – high proportion of broadleaf and open space



ELM Goals	Outcomes that might be bought by government
Clear Air	Reduced concentrations of particulates
Clean and plentiful water	Reduced concentrations of sediment Reduced concentrations of N+P Reduced concentrations of harmful chemicals
Thriving plants and wildlife	Enhanced status of native species Enhance quality, size and connectivity of habitats
Protection from and mitigation of environmental hazards	Enhanced resilience to flooding Enhanced resilience to wildfire Enhanced resilience to drought
Mitigation and adaptation to climate change	Increased sequestration of carbon Enhanced resilience of environment to climate change
Beauty heritage & engagement with the environment	Preserved and enhanced landscape character Preserved cultural heritage assets Enhanced access to the natural environment

Perennial energy crops to forestry

Cash flow

Investment





- Match silviculture to market – does everyone need to grow sawlogs?
- Improved cash flow and return on investment
- Regulations ready? How about permanence?