

Confor welcomes this Timber Industry Strategy Consultation

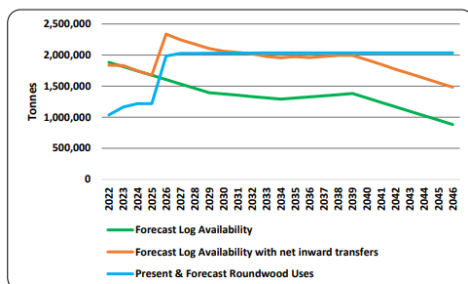
Confor (www.confor.org.uk) is the not-for-profit organisation for the UK's sustainable forestry and wood-using businesses. It has 1,500 member companies, representing the whole forestry and wood supply chain from seed to structure.

Confor welcomes and supports the ambition of the Welsh Government to have a focused strategy on timber production, recognising that there is a thriving wood industry in Wales that contributes positively to Net Zero goals as well as contributing to the Welsh economy and offering high quality green growth jobs in rural Wales.

In the context of increasing demand for wood fibre in Wales, and in fact globally, where the UK already imports around 80% of the wood products it uses annually, the Timber Industrial Strategy provides the perfect opportunity to present an ambitious roadmap that will lead to an increase in wood production and manufacturing of Welsh high value wood-based products for key industries such as construction.

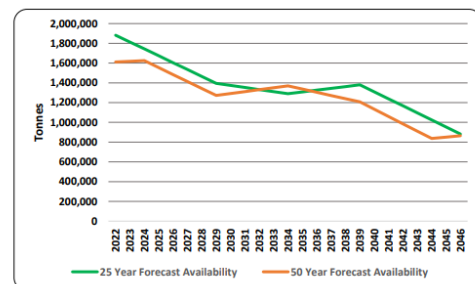
The **Wood Fibre Potential Availability and Demand in Britain and the Circular Economy 2022 – 2046** report highlights a critical issue: the negative trend in roundwood availability against a rising demand, projected to reach 2 million tonnes per year in Wales ([link](#)) by 2026.

Chart 28.4: Wales: Comparison of Coniferous Roundwood Potential Availability & Demand 2022 – 2046



Source: Forest Research, 2022 & Survey Data

Chart 28.5: Wales: Forestry Commission 25-year and 50-year Forecasts of Potential Coniferous Roundwood Availability 2022 – 2046



Source: Forest Research, 2016 and 2022

Figure 1 and 2: Charts from the *Wood Fibre Potential Availability and Demand in Britain and the Circular Economy 2022 – 2046* demonstrating 1: Potential availability and demand 2022-2046 in Wales & 2: Coniferous roundwood availability 2022-2046 in Wales

This underscores the urgency of managing existing forests effectively with timber production being a priority objective, and ensuring timber production is one of the key priorities of future new planting targets.

Addressing barriers to expansion and ensuring the industry grows to meet this increasing demand is essential. Key strategies might include:

- **Increasing productivity from existing woodlands** increasing supply of domestic wood in construction and innovation in the supply chain
- **Investing in new planting initiatives** to boost roundwood supply.

- **Promoting sustainable forestry practices** to ensure long-term viability.
- **Improving supply chain efficiency** from nursery to end product.

These steps will help balance the supply and demand for roundwood, supporting both environmental sustainability, achievement of Net Zero targets and economic growth in Wales.

Wales's commitment to progressive legislation, such as the Environment (Wales) Act 2016 and the Wellbeing of Future Generations (Wales) Act 2015, is impressive. The forestry sector's alignment with these objectives is vital for creating green jobs, enhancing ecosystem services, and promoting sustainable construction practices.

By investing in the timber industry and allowing it to reach its full potential, Wales can achieve a more prosperous, resilient, and healthier future. The benefits include:

- **Mitigating flooding** and slowing water runoff.
- **Improving soil quality** and carbon sequestration.
- **Enhancing air quality** and biodiversity.
- **Reducing the use of steel and concrete** in construction.

These efforts will not only support environmental sustainability but also contribute to economic growth and community well-being.

Addressing the "low hanging fruit" within Wales's forestry portfolio is crucial and includes:

- The **Woodlands for Wales** strategy highlights the need to bring large areas of unmanaged broadleaf and farm woodlands back into management.
- **The Welsh Government Woodland Estate**, holds the highest stake in the Welsh Timber Market and plays a pivotal role. Reviewing their plans to improve the standard of timber for high-value products is essential.
- **The review and development of effective long-term woodland management plans** can:
 - **Increase rural wealth** by boosting local economies.
 - **Enhance woodland management** practices.
 - **Increase carbon capture**, contributing to climate change mitigation.

These steps will ensure that Wales's woodlands are managed sustainably and effectively, supporting both environmental and economic goals.

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1. Increasing timber supply

a. How can the sustainable forest resource grown in Wales be increased to make more timber and wood fibre available for the future?

Firstly, one important piece of evidence resulting from recent Welsh (Bangor University) research strongly emphasises the potential risk to the role of wood use in Wales's net zero strategy/carbon budget if domestic softwood production is not increased to match increase in (UK) wood demand. It is now in press and should be published in the next month: Forster, E., Styles, D. & Healey, J.R. (2025).

Temperate forests can deliver future wood demand and climate-change mitigation dependent on afforestation and circularity. *Nature Communications* (in press).
<https://www.researchsquare.com/article/rs-3681726/v1>

Sustainable Wood Supplies

It would help to have a greater understanding of what sustainable level of timber/wood fibre supplies (softwood and hardwood) we require in Wales to enable our wood processing and manufacturing sectors to thrive and increase their contribution to green growth and jobs. We can then calculate what area of productive forestry and what tree species we require to achieve future resilient wood supplies and to improve Wales's future wood security. We would suggest that a realistic long term target for a sustainable annual yield of softwood from all Welsh forests should be around 2.2 million tonnes per annum. Any increase in hardwood production would be a bonus.

To achieve this sustained yield we will likely have to increase production from our existing forests and set realistic targets for productive conifers in new woodland creation projects.

Improving Forest Management

Improving the management of existing woodlands and forests and addressing potential barriers such as grants for:

- infrastructure and engineering to access the timber
- simpler management plans for long term felling licences
- encouraging the use of improved planting stock to increase productivity.

In the longer term, using modern tree breeding we should aim to increase productivity and resilience of key conifer species that will provide the timber and wood fibre for tomorrow's markets.

New Woodland Creation

New Woodland creation targets should be set to represent the ambition of the Timber Industrial Strategy. E.g. 65% of new woodland creation projects should have timber production as their

primary objective. If construction is the primary market then highly productive, suitable conifers must be the predominant species choice.

More work is required to inform landowners/farmers of the financial and environmental benefits of production forestry. Case studies could be produced to highlight the potential financial benefits from a variety of planting schemes.

Another potential incentive could be to remove permanency status for farmers who wish to try new woodland creation with timber production as the primary objective.

Other potential actions leading to improvement are:

A review into reducing the regulatory burden on new planting and speed up the process. There is evidence that there is investment money available subject to speeding up the process.

Incentivisation to enable woodland creation through adequate resourcing that has competitive rates in line with England and Scotland. The removal of barriers of hidden/added costs through the EIA process and the perceived benefits and appropriateness of surveys.

NRW: Welsh Government Woodland Estate (WGWE)

Natural Resources Wales (NRW) supplies the majority of the softwood timber supplied to the Welsh market. In recent year's NRW timber supplies to the market have been inconsistent and way below forecast availability. This has led to a reduction in confidence in NRW in the sector and potential loss of future investment in processing. Consistent and increased future timber supplies to the market are essential for the future viability of the wood processing sector in Wales. Therefore, it is essential that the Timber industrial Strategy lays out clear direction for the future management of the Welsh Government Woodland Estate (WGWE) to increase annual timber production, thereby generating much needed income, as well as delivering environmental and social benefits for Wales.

We would suggest that some KPI's are implemented for the WGWE:

- Woodland creation targets (with productive element) are set to ensure there is incentive to deliver woodland creation.
- Agree with the wood processing sector a target annual volume offered to the market to instil more confidence in the wood processing sector and provide continuity for the supply chain.
- Restocking to be completed within 3 years of harvesting to minimise delays in future wood supplies.
- Use improved planting material where possible to optimise productivity.

b. How can volumes of Welsh timber and wood fibre coming to market be increased?

Confidence and consistency are vital for the success of the forestry and timber industry.

We have already outlined above how additional volumes of timber may be increased from the WGWE. Increasing demand for wood products made from wood from Welsh forests could cause

an increase in the value of Welsh wood which would incentivise owners to bring additional fibre to the market. This may be achieved through actions described later in this response.

However, the immediate concern is how can the volumes of Welsh wood fibre coming to the market be maintained in the coming decades, before looking at how it can be increased in the longer term.

Looking forward, given the long-term nature of forestry investment, it's crucial to have **all-party political support** to mitigate the impacts of political changes and ensure sustained growth and stability.

Long-term support can help:

- **Provide stability** for investments and planning.
- **Ensure continuity** in policies and initiatives.
- **Foster collaboration** across different sectors and stakeholders.
- **Promote sustainable practices** that benefit both the environment and the economy.

By securing broad political backing, the forestry and timber industry can thrive and contribute significantly to Wales's environmental and economic future.

Baselining the current capacity and resources is crucial for ensuring the success of the timber industry in Wales. Here are some key areas to consider:

1. **Contractors and Hauliers:** Ensuring there are enough contractors to cut timber and hauliers to transport it is essential.
2. **Planners and Foresters:** Adequate numbers of planners and foresters are needed to bring the timber that is available to market. The forestry sector in Wales employs between 8,500 and 11,300 people, but ensuring these roles are filled with skilled professionals is vital.
3. **Support for Woodlands in Production:** Prioritising woodlands that are actively providing timber over those that are not is important for meeting demand. Strategies to support productive woodlands include sustainable forest management practices and incentives for high-value timber production.

By addressing these areas, Wales can ensure a robust and sustainable timber industry that meets both current and future demands.

Simplifying the process for submitting management plans is important. It could incentivise a broader range of operators to engage in longer-term and more strategic felling and restocking programs. By making the process more accessible, it can encourage:

- **Greater participation** from diverse operators.
- **More comprehensive management plans** that consider long-term sustainability and offer an opportunity to accurately forecast private sector timber volumes.

- **Holistic approaches** to felling and restocking, ensuring balanced and productive forest ecosystems.

This could lead to more effective forest management, increased timber supply, and enhanced environmental benefits.

Coordinated and sustainable herbivore and squirrel management programs are crucial for the successful establishment of broadleaf woodlands. Effective management can help:

- **Protect young trees** from damage caused by herbivores and squirrels.
- **Enhance biodiversity** by maintaining balanced ecosystems.
- **Promote healthy forest growth** and ensure the long-term sustainability of broadleaf woodlands.

Incentives for productive broadleaf establishment and management, such as financial support for forest management activities, can further encourage landowners to participate in these programs.

2. Increasing resilience in our forests

a. What actions can be taken in Wales to reduce the risks to our forests posed by climate change and pests and diseases?

Confor would suggest the development of a Welsh strategy for resilient forests, not unlike that recently published in Scotland. The strategy would cover mitigation against the various threats posed to Welsh forests by climate change and pests and diseases. The key to a successful strategy will be working closely with key stakeholders. Some key areas this might cover are:

Species diversity for timber production

It is accepted that species diversity is important for future resilience against pest and disease. However, it is imperative that future species choice is taken through a logical and evidenced process taking full account of productivity, economic return and future market demand. We need to avoid planting large areas of species without full silvicultural knowledge for successful establishment and their timber properties.

We would anticipate a small number of additional/alternative species to be identified for improved tree breeding programmes to maximise future productivity. We would also support further research to improve resilience of our key productive species, particularly Sitka spruce.

Further work is required to establish what potential species mixtures would be most effective for resilience and productivity.

Managing Pests and disease.

We should learn from previous experience to identify where we can improve protection policy and practices to avoid pests and diseases where possible, and implement improved monitoring techniques to identify them earlier, and implement timely contingency plans.

Managing Windblow

We believe that the management of windblow requires to be more prescriptive. If windblown areas are not cleared up quickly it could cause favourable conditions for pests such as Ips Typographus and/or heavy fuel loads for wildfires.

Improving our knowledge of productivity of alternative silvicultural systems.

It is important that if we are to adopt alternative silvicultural systems at scale, we fully evaluate the long term impact on future wood supplies.

Wildfire

Preventing forest fires and managing summer heat in future years will be critical for maintaining healthy forests. Creating regional plans to identify strategies for minimising the threat of wildfire and ensuring adequate resourcing and skilled personnel in conjunction with the Fire Service.

Managing all Woodlands

Actively managing woodlands helps reduce risks from pests and diseases, and enables any outbreaks to be identified quickly and action taken. Woodland created and managed for timber production will be managed, whereas not all other woodland types are managed.

Support for Establishment and Sustaining Woodland Cover:

- **Incentives and Funding:** Providing financial support and incentives for landowners to establish and maintain diverse woodlands.
- **Training and Resources:** Offering training programs and resources to help landowners and forest managers implement best practices.

By focusing on this we can create more resilient and sustainable woodlands that support biodiversity, ecosystem services, and long-term economic benefits.

Biosecurity measures are crucial across the forestry sector, especially with the potential increase in plant imports due to the broadening of species and stock choices for non-native forestry purposes. This can elevate the risk of introducing new pests and diseases.

Here are some key points to consider:

1. **Enhanced Biosecurity Measures:** Implementing stringent biosecurity protocols can help prevent the introduction and spread of harmful organisms. This includes measures such as cleaning equipment, monitoring imports, and ensuring proper quarantine procedures.
2. **Control of Horticulture Plant Imports:** Better regulation and control of horticulture plant imports are essential to mitigate biosecurity risks. This involves thorough inspections, improved detection technologies, and stricter import standards.

3. **Collaboration with Research Organizations:** Working with organizations like Forest Research, the Future Trees Trust, and the Conifer Breeding Coop can help develop resilient tree species and improve biosecurity practices.
4. **Public Awareness and Training:** Educating industry professionals and the public about biosecurity measures can significantly reduce the risk of pest and disease spread.

Adapting woodland management to enhance resilience against extreme weather events and climate impacts is crucial. E.g.

1. **Downstream Flooding:**
 - **Catchment Woodland:** Planting trees in strategic locations within catchments can reduce peak flows and enhance soil infiltration.
 - **Floodplain Woodland:** These woodlands can slow down and hold back flood flows, reducing downstream siltation and flood risk.

b. How can growers and nurseries accelerate the implementation of adaptation measures?

Creating an action plan for sourcing seeds and continued development and adoption of modern tree breeding methods is crucial for increasing resilience and adaptation into Welsh production forests. Here are some key points to consider for growers and nurseries to be successful in accelerating the implementation of adaption measures:

1. **Identifying Key Species:** As explained above it is important to identify any new species to be adopted for large scale planting across Wales using a logical and informed process.
2. **Sourcing Seeds:** This is a critical issue when choosing key species. Seed availability of new diverse species and timescales/challenges for scaling up should be considered carefully before finalising any shortlist of species.
3. **Modern Tree Breeding techniques:** Where appropriate, modern tree breeding techniques should be encouraged and incentivised to improve productivity and resilience of future forests.
4. **Collaboration and further research** between key organisations should be explored and encouraged to accelerate the enhancement of tree breeding technologies and improve the resilience of key species to pests, diseases, and climate threats. Organisations such as Forest Research, Conifer Breeding Co-op, Oxford University, Future Trees Trust and Maelor Nurseries have all been active in this area in recent years.
5. **Long-Term Investment:** Tree breeding, genomics, and growing new tree species is an expensive and often speculative process. Therefore, this will require consistent funding from various public and private sources.
6. **International Collaboration:** It would it be worth exploring opportunities to collaborate with international organisations that are leading in this field.

By focusing on these steps, Wales can ensure a sustainable and productive forestry sector that meets future timber demands and contributes to environmental and economic goals.

3. Resource efficiency and circular economy

a. What actions could be taken in Wales to encourage reuse and recycling of wood to minimise waste?

The wood industry has made great strides over the last number of years in almost eliminating wood waste from our wood processing. There are successful case studies in Wales, such as the pallet recycling at BSW mill and Kronospan's use of recycled wood for chipboard and MDF lines. These initiatives significantly extend the life of timber products and contribute to a circular economy.

To further enhance these efforts, it's important to:

1. **Work in Partnership with the Wood Recycling Association:** Collaborating with the Wood Recycling Association can help share expertise and resources, promoting best practices in wood recycling.
2. **Introduce Incentives for Innovative Products:** Providing incentives for developing new products using post-use wood can drive innovation and create long-life products.
3. **Encourage R&D into Long-Life Reuse of Post-Use Wood:** Supporting research and development in this area can lead to new technologies and methods for reusing wood, enhancing sustainability.
4. **Encourage design for efficient deconstruction:** Encourage architects and structural engineers to design for efficient deconstruction of building materials so that they can be reused.
5. **Wood cascading:** Explore policies that encourage cascading of wood starting with long life high, value products in construction and furniture at the top of the hierarchy of use.

The timber processing sector in Wales is increasingly focusing on reuse and recycling to create a more sustainable and circular economy. By prioritising non-carbon renewables and reducing reliance on burning timber for energy, Wales can significantly contribute to decarbonization efforts. This approach not only helps in reducing carbon emissions but also supports green job creation and sustainable housing.

Support and financial support is needed for start-up businesses, as well as innovation grants to kick start research, not just to universities but businesses too. Additionally, the end user should be considered. How do they access this new product in an affordable way?

b. How could Wales promote innovation to design and manufacture wood-based products with increased value, extended durability and climate resilience?

- Consider policies and/or incentives to create demand for such products. Without demand there will be no incentive for businesses to innovate and invest.
- Support innovation and commercialisation of new products such as wood fibre insulation.
- Create opportunities to showcase case studies of best practice of the above.
- Create design and build competitions for early stage professionals.
- Offer a fund where SMEs can bid to commercialise innovative designs and manufacturing processes using Welsh wood fibre which will increase value, extend durability and climate resilience.

This is happening internationally, we need to resource and promote the companies within Wales who have these connections and support these processes.

4. Instilling confidence in demand

a) What actions could be taken in Wales to increase the use of timber and wood fibre in long-term uses, such as construction?

Stabilise the supply chain, break the above barriers, promote C16 rather than C24 and educate architects and the greater supply chain.

- Work in collaboration with industry to identify any key barriers to achieving above and then create a promotion campaign to address these barriers.
- Consider implementing a Wood First Policy. Welsh Government have led from the front in terms of social housing and should do likewise for all publicly funded buildings through a Wood First or regenerative materials (biogenic and recycled) first policy.
- Alternatively, introduce new building regulations such as the proposed Part Z to account for the embodied energy in a construction project.
- Use public procurement to showcase how homegrown timber can be used safely in construction. E.g. Like the Gen Zero project currently being undertaken by the Department of Education.
- Welsh government could work in partnership with the forestry and wood industry to promote the greater use of timber and wood fibre in construction.
- Support innovation and commercialisation of new products such as wood fibre insulation. In addition, encourage and support further investment by existing Welsh businesses like Kronospan to manufacture additional wood products for construction such as OSB (Oriented Strand Board).

b) How can we use home-grown timber and wood fibre to maximise local supply chain opportunities?

Some key actions to address this question could include:

- Create a collaborative campaign between WG and the forestry industry. Promoting the benefits of using UK timber, including Welsh timber, to construction decision makers such as structural engineers, quantity surveyors and architects.
- WG to work with the new ILG (Industry Leadership Group) to encourage trade between local businesses along the wood and construction supply chain.
- Use public procurement policies to incentivise the use of local biogenic materials in construction.

c) How can Wales better align timber supply with market demand?

As stated earlier in our response. A recent Confor [report](#) highlights that timber demand is forecast to outstrip supply in Wales in the very near future. In fact, wood processing businesses in Wales are already importing wood fibre from Scotland and Ireland, as well as England. There is a real “timber security” issue for Wales, which has to be addressed.

That is why we need to adopt strategies that will increase future timber production from Welsh forests. This should include maximising the sustainable volume of timber brought to market from the WGWE and considering shorter rotations and continued use of improved stock Sitka spruce until suitable improved alternatives are available.

If this question is more specifically relating to timber supply from the wood processing activity to downstream users or use in construction, for example, Welsh Government could introduce local planning and/or procurement policies that favour the use of biogenic material in construction materials. Also see response to previous question.

5. Developing sector capacity

a. What challenges need to be addressed to improve recruitment and retention in forestry and timber industries in Wales?

This is a long-term industry which needs consistency and a future vision, much of this is linked to Question 1.

Awareness of forestry as a career and then access to suitable local courses as young people don't tend to travel far. There needs to be more availability within the college systems for rural crafts to include commercial forestry and the wide variety of roles that are available. Retention is important to make the industry stable. Along with further education, higher education

opportunities also need to be acknowledged. Bangor University are important in sustaining and growing university-level education of forestry at both BSc and MSc level in Wales. This includes both full-time and part-time distance learning, and Wales currently has the greatest strength of this provision of any nation within the UK. It is important to show the vision, that the provision of skills needs to go all the way through the spectrum up to the levels of forest management and planning, and research to meet the needs of the industry.

In terms of **sector capacity**, Forest Works Manager skills are required. There is an opportunity and demand to develop a larger and highly trained contractor base who have the skills, equipment and entrepreneurship to develop productive and sensitive models for a range of forest types, equipping the processing sector and beyond to make use of the wider range of species and timber sizes, that potentially will come into the market.

As identified, there is a need to increase the quantity of entrants to the career, but this also needs to be paired with the need to address EDI (equality, diversity and inclusion) issues, and to increase the diversity of entrants, including those from deprived urban communities. This research needs to be acknowledged and supported. There is work currently being undertaken by the RFS and indeed Bangor University, under Bid Webb in the area of research.

There is also a need to further develop work-based learning opportunities for all levels of education to attract potential students that cannot afford full-time education and/or are already in employment.

In addition we need to:

- **Carry out a detailed labour market intelligence analysis** to assess the scale of the challenge.
- **Government needs to work with industry to promote forestry and wood processing as** an essential part in the Welsh economy and its contribution to Net Zero.
- **Government and industry to work together to develop and promote clear recruitment gateways for these sectors.**
- Ideally it would be beneficial to include **an element of forestry in the school curriculum.**

b. What gaps are there in forestry and timber training and skills provision in Wales?

There is no overarching narrative with political support in Wales that is agreed by politicians e.g. https://youtu.be/q_dhXbLj9mE?si=ONi5fLVR2lCjf69w (Video explaining the supply chain).

A similar video is needed to illustrate to farmers the opportunity of planting shelterbelts and or fields of 5-20ha with productive timber trees along with a cash flow illustration.

The gaps are geographic. There are courses available, but they are not always easy to get to. Providing funding for travel or accommodation could help or even opening new centres. It is hard to deliver courses which are high cost and low numbers such as FMO (forest machine operator) and this supports the need for the Forestry Training Service UK (FTSUK). This includes the need for additional contractors, machine operators, skilled steep ground operators, advanced

chainsaw and winch operators, mechanised harvesting operators and planters. We also require upskilling within the current workforce e.g. Forest Works Managers and mental well-being. We need access to good quality trainers to train this anticipated demand.

Farming Connect needs to be incorporated into this as it signposts, advises and provides training to rural landowners.

Gaps:

- FMOs (forest machine operators) learn about the health and safety aspects of managing their machinery **but do not learn in detail about silviculture and site management** so there is a knowledge gap here.
- **Support (financial and mentorship) for startup businesses would** help meet anticipated market demand.

Regarding the challenges and opportunities in forestry education and training, here are some key areas to address:

1. **Steering Students into Commercial Forestry:**

- **Curriculum Review:** Colleges could review and update their teaching modules to include more content on commercial forestry, emphasising its importance and career opportunities, along with ensuring topics are covered with all agricultural and rural land based courses.
- **Industry Partnerships:** Strengthening partnerships between colleges and commercial forestry businesses can provide students with practical experience and clearer career pathways.

2. **Funding and Support for Training Providers:**

- **Economic Support:** Training providers often have less support compared to colleges. Increased funding and grants for training providers can help them offer more comprehensive post-college support.
- **Focus on Forestry First:** The cessation of funding for Focus on Forestry First has impacted the support available. Renewing or finding alternative funding sources for such initiatives is crucial in supporting the need for training.

3. **Data Feedback and Continuous Professional Development (CPD):**

- **Feedback Mechanisms:** Collecting data from training providers can help identify gaps and areas for improvement in forestry education and training.
- **CPD Events and Mentorship:** Training providers can organize CPD events, mentorship programs, and provide guidance to ensure graduates are ready to enter the profession.

4. **Promoting Commercial Forestry Careers:**

- **Awareness Campaigns:** Conducting awareness campaigns to highlight the benefits and opportunities in commercial forestry can attract more students to this field.

- **Support and Guidance:** Providing clear career guidance and support to students can help them navigate their options and choose commercial forestry as a viable career path.

Much of this is market led, and the demand for these skills needs to increase to create the demand for training in Wales. It is important to work collaboratively across GB countries as many within the sector work cross border.

c. What actions are needed to support the development and adoption of new products, processes and/or technologies?

To create the confidence for investment, it is essential to have a consistent long-term commitment to the development of the sector across all government departments as indicated in the consultation.

Financial support is required for site development and for the purchase of capital equipment in the wood processing sector, especially at micro and SME level where most of the innovative activity takes place.

Confor recommends a strategic forward-thinking approach:

1. Conducting Studies:

- **Identify New Products, Processes, and Technologies:** The Welsh Government's Co-operation and Supply Chain Development Scheme supports pilot projects and the development of new products, practices, processes, and technologies. This scheme can be a valuable resource for identifying innovations that add value to the Welsh supply chain.
- **Supply Chain Mapping:** Detailed supply chain maps can help identify opportunities to localize supply chains, increase the capability of indigenous businesses, and attract targeted inward investment.

2. Development and Adoption:

- **Support for Innovation:** initiatives needs to be developed to support the industry to commercialise successful innovative products and systems.
- **Flexible Contract Changes:** Flexibility in contract clauses can facilitate the adoption/exploration of new technologies and processes.

3. Ensuring Raw Material Supply:

- **Securing Supplies:** Identifying vital products, raw materials, and components for the supply chains and ensure a steady supply of raw materials.
- **Circular Pathways:** Demonstrating circular pathways for recycled materials through product development.

6. Underpinned by behaviour change

a. What actions are needed to improve public understanding of productive forestry?

Landowners

Develop case studies of examples of farmers successfully practising production forestry in a positive way, retaining the integrity of their farms and quashing the illusion of losing family farms.

This needs to be on the agenda for politicians, society and all public organisations, as it needs to be championed and supported to create the change needed.

Ownership: The Welsh Government Woodland Estate are our woodlands, everyone in Wales, so everyone should have a vested interest in their investment. Iolo Williams did some programmes on forestry promotion; this needs to keep happening and it needs to be funded and provided by

Welsh Government. **Welsh Government need to say with a loud clear voice, in collaboration with industry, promoting the benefits of production forestry, timber production and processing and increased use of timber in long life products such as construction is good, good for the economy, environment and for Wales.**

The publication of this strategy would go a long way to helping promote production forestry as a key contributor to the economy and society of Wales.

Education

Educating children and teachers about forestry and its unique aspects in the UK can help dispel myths and foster a deeper understanding of local ecosystems. Here are some steps to consider:

- **Integrating Forestry into the Curriculum:**
 - **Curriculum Development:** Work with educational authorities to develop modules that accurately represent UK forestry, highlighting the differences from global issues like deforestation in rainforests.
 - **Forest School Programs:** Programs like Forest School offer hands-on learning experiences in natural settings, helping children connect with nature and understand sustainable forestry practices.
- **Summer Schools for Teachers and Children:**
 - **Funding and Support:** Secure funding to run summer schools focused on climate, forestry, biodiversity, and human health. These programs can provide immersive learning experiences and foster a deeper understanding of how these elements are interconnected.
 - **Existing Models:** Look at successful models like the WAHPL (Wales Academy for Health and Physical Literacy) Summer Schools, which offer outdoor health and wellbeing programs, and the Seren Foundation's climate literacy workshops.
- **Promoting Accurate Information:**

- **Educational Resources:** Utilise resources from organisations like Forestry England, which offer curriculum-linked materials and forest visits to bring learning to life.
- **Community Engagement:** Engage with local communities and schools to promote the benefits of sustainable forestry and the importance of using local timber.

b. Do you support the proposal to establish an Industry Leadership Group (ILG) in Wales? Yes/No

Yes, but it must be industry led and supported by the public sector. It is important to bring leaders together but also to listen to them. This Forum would focus on identifying threats and opportunities for economic growth along the wood supply chain through innovation and investment. It could offer a direct link to key business leaders for the relevant Senedd Minister. We would suggest that the Minister would co-chair the group with a business leader that had been elected by ILG members. This could create a good route to identify where public sector funding could be best leveraged to deliver the Timber Industrial Strategy.

i) If yes, what contribution could it make during the implementation of the Timber Industrial Strategy?

The focus of the ILG should include the oversight of the implementation of the Timber Industrial Strategy. Membership should be focused on experienced senior business managers from across the full wood supply chain including imported and post-use wood.

The ILG would also offer a sounding board for Welsh Government and senior politicians to identify opportunities/challenges for economic growth in the supply chain. Key performance indicators need to be established along with accountability to support these actions.

c. Do you support the proposal to recruit a Chief Forester for Wales? Yes/No

Yes, we support the proposal under the remit outlined in the consultation document. We would suggest that the Chief Forester would report directly to the relevant Minister and would have a seat on the NRW board.

Care would need to be taken to avoid mission creep from the original remit. The successful candidate should be well respected across the forestry sector and have a proven positive track record in the industry.

i. If yes, what added value would the role bring to the forestry sector in Wales?

The main role of the Chief Forester would be to provide independent advice to the relevant Minister of the Senedd with regards to the forestry professionalism within NRW and to be

responsible for maintaining and ensuring professional standards are adopted and applied in NRW.

It is important this person is independent of Natural Resources Wales and Welsh Government, and they need to feed into the ILG. They need to focus on the industry, and Confor would like to be involved in developing this role to ensure the right questions are asked to obtain the right person for this role.

7. What, in your opinion, would be the likely effects of the proposals on the Welsh language? We are particularly interested in any likely effects on opportunities to use the Welsh language and on not treating the Welsh language less favourably than English.

- a. Do you think that there are opportunities to promote any positive effects?

Forestry is a part of the rural land sector in Wales, many of the foresters in Wales speak Welsh or learn Welsh. Forestry jobs are critical in supporting the language and enabling people to stay in their rural communities.

- b. Do you think that there are opportunities to mitigate any adverse effects?

Funding support to learn Welsh in the sector.

A campaign that shows the Welsh language thriving on farms and in rural towns where timber is grown and harvested.

Translation support: FISA and forestry research guides: bilingual services/ funding to support industry guidance into the Welsh Language.

8. In your opinion, could the proposals be formulated or changed so as to: - have positive effects or more positive effects on using the Welsh language and on not treating the Welsh language less favourably than English; or - mitigate any negative effects on using the Welsh language and on not treating the Welsh language less favourably than English?



9. We have asked a number of specific questions. If you have any related issues which we have not specifically addressed, please use this space to report them. Please enter here:

Issue one:

Natural Resources Wales (NRW) plays a crucial role in managing forestry-related tasks, including regulations, permits, licenses, and the public forest estate. The challenges faced by NRW, such as budget constraints and the loss of experienced foresters, have impacted their ability to meet timber supply targets and manage forests effectively.

In collaboration with NRW, Confor is developing a discussion paper outlining high level options for alternative business models. This is a proactive approach to address these challenges.

These models aim to improve the management and productivity of public forests, ensuring they meet future timber requirements and contribute to Wales's environmental and economic goals.

Confor recommends a review of the forestry related business activities of Natural Resources Wales (NRW) to explore effective solutions, including working more closely with the private sector, to ensure that it has the resources and expertise to meet the needs of all of its stakeholders, including the wood production and processing sectors.

Priority aims of the revised model would include:

- **Reinvest profits** into forest management to ensure high-quality restocking and effective thinning operations.
- **Enhance accountability** to ensure the highest standards of silviculture and maximize returns on high-quality timber products.

If successful, this outcome could reduce NRW's financial and resource burdens and foster long-term investment in Wales's forestry sector, benefiting both the environment and the economy

Issue Two

It's concerning that no-one with forestry or wood processing related backgrounds has managed to become a **board member of Natural Resources Wales (NRW)** due to perceived conflicts of interest. This lack of representation can impact leadership, drive, and accountability in maintaining high silvicultural standards for the public forest.

Supporting forestry operations teams, regulators, and woodland creation teams from the top of the organization is crucial. Understanding why targets are failing and addressing

the under-resourcing and lack of accountability is essential for improving woodland creation and timber supply.

The remit of the NRW Forestry Regional Advisory Committee is too narrow, and there is a lack of an appropriate forum for external expertise and stakeholder perspective to effectively and proactively advise both WG and NRW on forestry issues. Confor advocates the need for a more effective external advisory forum with more continuity than the former Deputy Minister's "Deep Dive" group and a clearer forestry/woodlands focus than the "Wales Land Management Forum". What is the Welsh Government's view on the void left by the demise of the "Woodland Strategy Advisory Panel"? This is an opportunity to create good external support for NRW to enable delivery.

Confor's suggestion is to automatically include representation of the forest industry on the NRW Board. This person(s) would contribute positively to the Board by bringing insight and focus to ensure NRW are suitably resourced to achieve the highest standard of sustainable forest management and meet future timber requirements for the Welsh timber industry.

Solutions that need to be considered by Welsh Government and the Senedd: these are comprehensive and crucial for the future of forestry and the timber industry in Wales.

1. **Land Use Strategy:** Ensuring all strategies and industries, including forestry, biodiversity, farming, horticulture, managing waterways, and National Parks, complement and work together.
2. **Roadmap for Timber Industrial Strategy Delivery:** Establishing clear targets, accountability, and built-in reviews to ensure timely and effective implementation.
3. **Competitive Grant Rates:** Making grant rates competitive with those in England and Scotland to incentivize participation. Ideally a very favourable grant rate for up to 20% of a sheep farm to be planted with productive trees provided it has lorry access and or funding for infrastructure. This would limit conversion of farms to trees and incentivise farmers to think differently.
4. **Review of Priority Habitats:** Turning the system around to speed up the process of woodland creation, with greater accountability on why a forest should not be planted.
5. **Addressing Barriers to Woodland Creation:** Reviewing and overcoming barriers to meet woodland creation targets.
6. **Reviewing the permanency clause** of woodlands, as this is a perceived barrier to woodland creation

7. **Promoting Net-Zero Goals:** Clearly acknowledging and promoting the timber industry's role in helping Wales meet its net-zero targets.

These steps will help ensure a sustainable and thriving timber industry that supports both environmental and economic goals in Wales.