



# **James Jones & Sons Ltd**

**David S.Leslie : Senior Harvesting Manager.**

Responsible for Harvesting and Roundwood procurement for  
the companies 6 Sawmills in Scotland.





**Timber Development Programme  
Improved Conifer Timber Quality through Plant Selection and Silviculture**



**Birnam Arts and Conference centre, Dunkeld  
11<sup>th</sup> February 2009**

# ARE WE CRAZY ?

## Stephens Croft : Lockerbie

Sept 08



Dec 2008



Feb 2009





# “James Jones and Sons announce £20m Sawmill investment at Lockerbie”

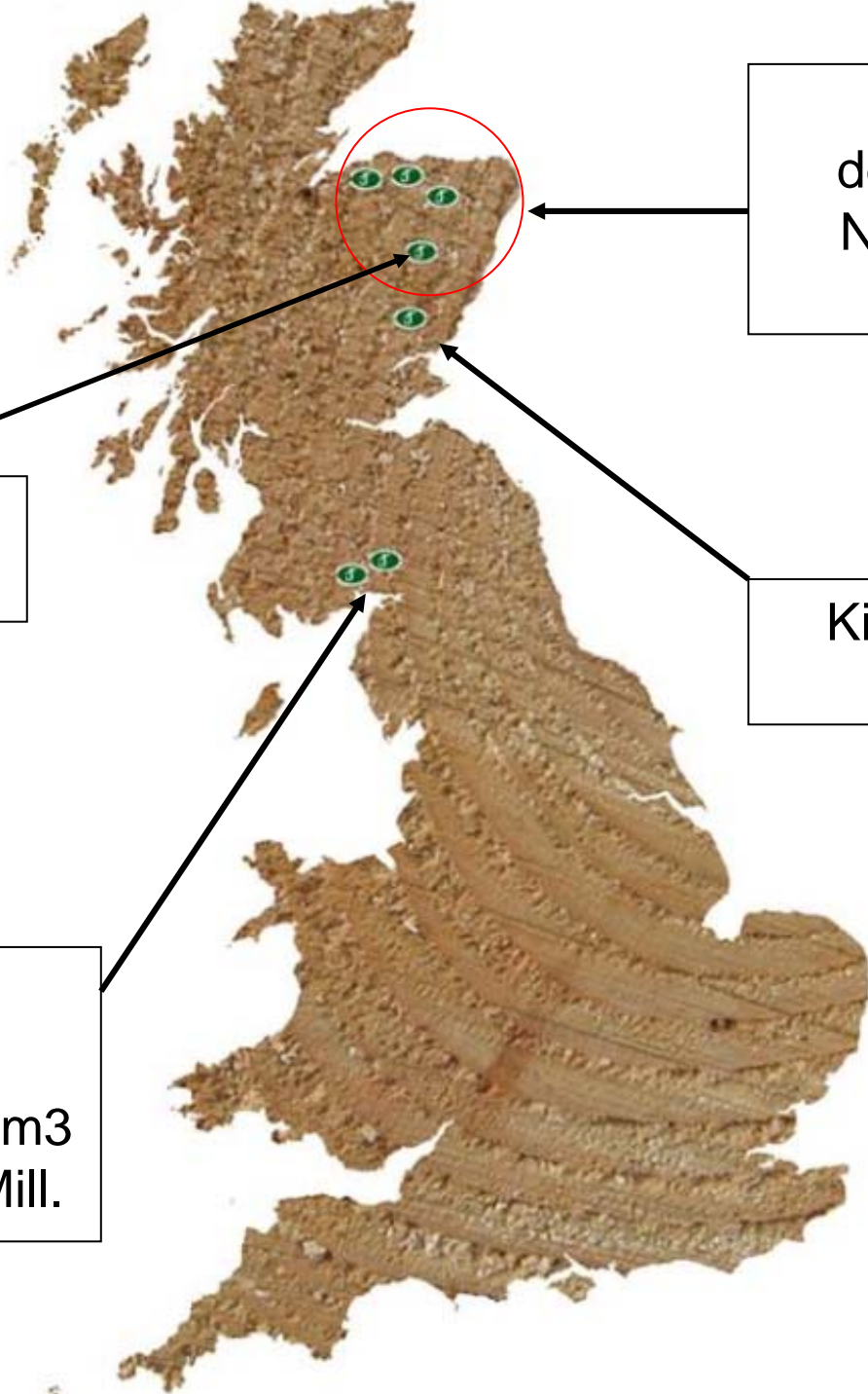
“UK House Starts fall by 50%”

“Recession may be worst for 100 years” Ed Balls.

“Euro at parity with Sterling!”

THE CROP – Quality, Availability, Sustainability.

**Ongoing Developments**



Focus on developments for North East Mills : 2009-2014

Aboyne Biomass Plant : 2008

Kirriemuir Edger. 2008

2009.  
Lockerbie 3.  
Additional 140,000m3  
New Carcassing Mill.



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# Lockerbie Sawmill.

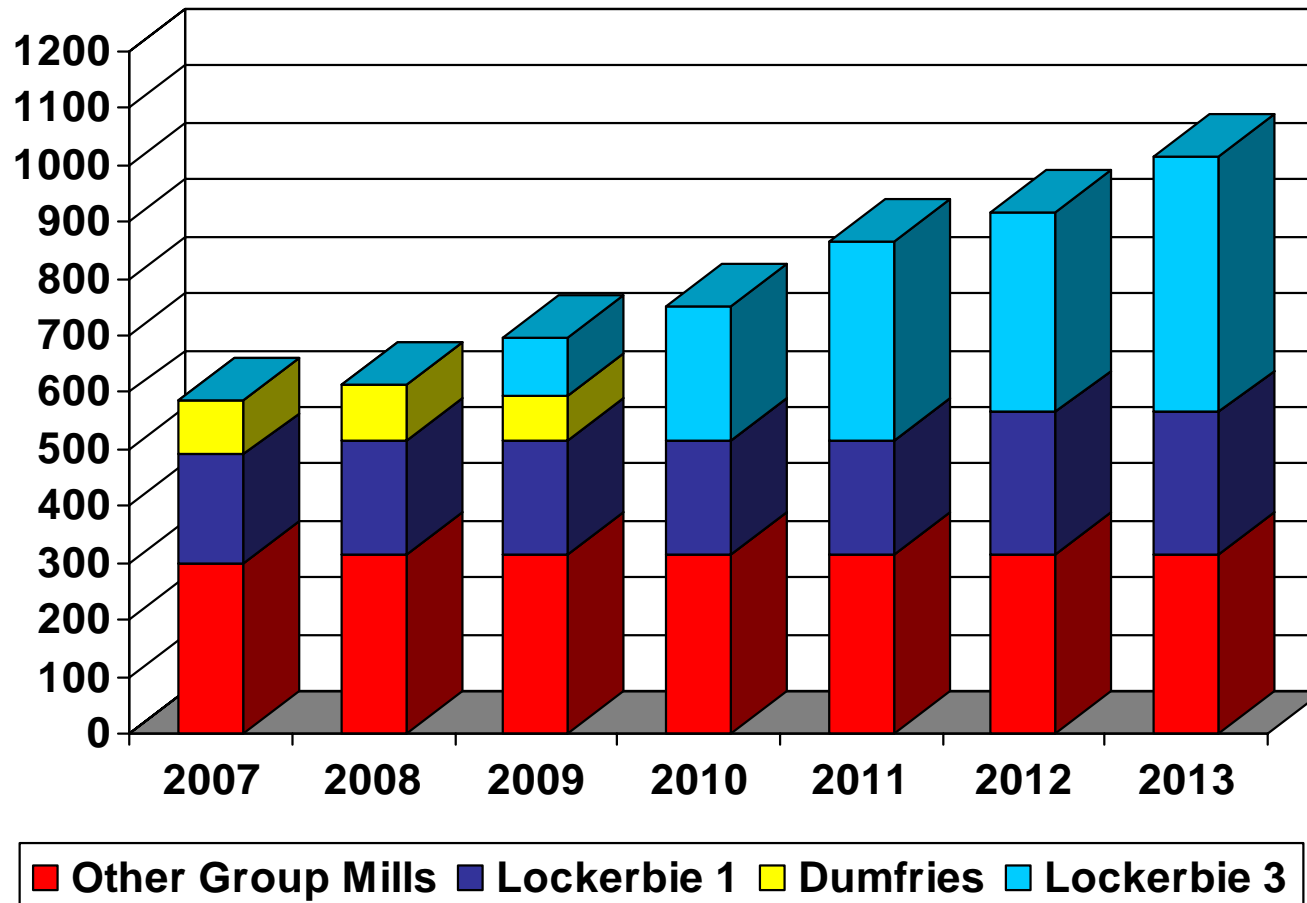


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- Total capex to date: £15M
- Lockerbie 3 : New Carcassing Mill
- Capacity:
  - 140K m3 (single shift)
  - 235K m3 (roundwood requirement)
- Estimated capex: ~~£20M~~ £22m!
- Estimated start up: Sept 2009



# JJSL Group Roundwood Demand



# The Crop.

## Problems? What Problems?

**S**traightness.

**I**ntegrity.

**R**oughness.

**T**aper.



# Straightness.

- Sweep.
- Crook.
- Corkscrew



# Integrity.

- Rot/Degrade
- Stiffness
- Grain angle



# Roughness.

- Knot size
- Knot frequency
- Included bark
- Flairs/Distortion



# Taper.

- Excessive taper
- Inconsistent taper
- Ovality



# Processing stages.

1. Harvesting
2. Haulage and handling
3. Sawing
4. Secondary processing
5. Sales



# 1. Harvesting



- Timber Recovery S I R T
- Wear and Tear S I R T
- Cost £/T S I R T
- Crop information S I R T
- Availability S I R T





# 3. Secondary processing



- Kilning
- Grading
- Planing/Resawing
- Treating

S I R T

S I R T

S I R T

S I R T

### 3. Other issues



- **Reputation** - Poor product reaching market
- **Morale** - Reduced efficiency and issues!
- **Availability** - Output expectation by category.
- **Return** - Increased net sawmill costs.
- **Competition** - Substitution by others.

# Why not mention selling?

- Fit for purpose .
- Grades/Standards (C16, BS etc)
- Information to Market.
- Ability to supply.

# What are we doing about it?

## 1) Lockerbie 3 : Scan and Set Sawmill

**S** Curve sawing technology and handling.

**I** Scanners, acoustic tools, and photography.

**R** Diameter range, butt reducers, scanners.

**T** State of the art edging systems, scanners

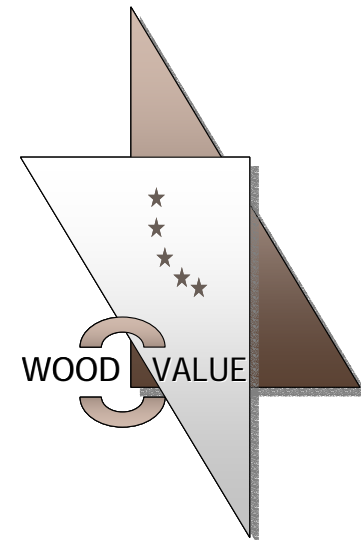
# What are we doing about it?

## 2) Research and Development

**Acoustics research/Scanner research.**

**Mill research and development.**

**European Research projects.**



# What are we doing about it?

## 3) PR, Representation, Advertising

**Product development and marketing**

**Industry groups and consultation**

**Information on products, specifications.**

# Diversification !



- Equity shareholder in forestry business



- Pallet Manufacture and repair business



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- Sawmilling
- Harvesting
- Timber Systems



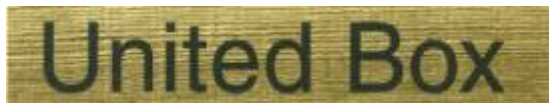
- Joint Venture in lumber business : Canada/USA
- Investments in telecoms business : Italy



- Solid wood panel distribution



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- Partner in wood product manufacturing business

# Summary

- Recovery and Yield essential.
- Maintain efficiency through investment.
- Maximise value to grower.
- Maintain reputation in the market.
- Sustainability of supply chain to market.

We have got what we've got and we must make the most of it for our family firm to be in a position to benefit from the better crops in the future.



Thank You.

