

# EXPERT GROUP ON TIMBER AND TRADE STATISTICS

Minutes of the meeting held in Silvan House, 231 Corstorphine Road,  
Edinburgh, on Thursday 14 August 2014

**Present:** Alan Christison, Roger Coppock, Alan Corson, Neil Cowan, Michael Fairgrieve, David Leslie, Nigel Manley, Cameron Maxwell, Nick Moore, Richard Palmer, John Paterson, David Sulman, Sheila Ward, Peter Weston (Chair), Tony Willis, Jeremy Darot (Secretary), Andrew Heald (representing Stuart Goodall), Alastair Kerr (agenda item 9), Alastair Sandels (agenda item 9)

Apologies: Stuart Goodall, George Webb

## 1. APPROVAL OF PREVIOUS MINUTES (24 April 2014)

The minutes were agreed.

## 2. MATTERS ARISING

### A. Actions completed since the last meeting

Action: Statistics team sent a draft of the user engagement survey report to the group. No comments were received. The report was published on the FC statistics website. A user implementation plan will now be prepared and circulated to the group for comment.

Action: Sheila Ward provided a verbal update on developments in woodfuel statistics. The FC has been discussing with DECC what data might be available from RHI. At an international level, a new Team of Specialists on wood energy has been set up by UNECE. The initial meeting in June indicated that the team has interest in sharing knowledge on woodfuel statistics. Conversion factors are seen as an important issue in improving the statistics.

Action: Group has provided estimates for almost all large non-respondents.

Action: Statistics team has checked woodfuel estimates (see agenda item 3 on the discrepancy between softwood removals and deliveries).

Action: Statistics team has clarified in the *UK Wood Production and Trade* release what is and is not covered in the removals under licence figures.

Action: Statistics team has included the conversion factor diagram from *Forestry Statistics* in the back of *UK Wood Production and Trade*.

Action: Statistics team has included pellets as a separate category in the trade tables of *UK Wood Production and Trade*.

Action: Statistics team has included conversion factors in the JFSQ.

Action: Jeremy Darot has circulated the Timber Utilisation Update presentation.

Action: Alastair Sandels (Fountains Forestry) will give a presentation to the group on private sector timber prices data (agenda item 9).

Action: NFI team has stressed in the beginning of the 50 year forecast report that the figures are a forecast of availability, not production.

Action: NFI team has clarified assumptions regarding hard to harvest sites, and highlight access issues in the report.

Action: NFI team has included a combined (FC plus non-FC) bar chart showing GB standing volume, increment and production.

Action: NFI team has modified references to current demand in the conclusions.

## **B. Actions outstanding**

**Action: Confor to come back to the group with a proposal about updating the UK timber industry online resource.** Statistics team will continue to provide statistics, and will provide links to the online resource from the FC web pages.

**Action: Sheila Ward / Peter Weston to update the group on progress in the review of FC timber price data.**

**Action: Statistics team to circulate draft of user engagement implementation plan to the group for comment.**

**Action: Statistics team to revisit the wording of the questionnaires regarding removals under licence for next year's survey.**

**Action: George Webb to follow up with Alistair Kerr regarding the apparent discrepancy between wood-based panels inputs and production.**

**Action: Statistics team to further investigate the use of Wood Recyclers Association data to estimate exports figures.**

## **3. STATISTICS (Jeremy Darot/Sheila Ward)**

Jeremy Darot and Sheila Ward presented a paper on near-final estimates of 2013 timber statistics, and sought feedback from the group.

Since the provisional data was published, some additional survey returns have been received, as well as estimates from the group for almost all large non-respondents.

For the past three years, estimates of softwood removals have exceeded deliveries by about 300 to 400 thousand green tonnes. The group agreed that no action was required at this stage, given that the percentage difference was relatively small. The estimate for businesses not covered by the removals survey will be kept unchanged at 15% of total removals.

**Action: Statistics team to re-label “Other” as “Private Sector” in the relevant timber tables, and to include a footnote as appropriate explaining what the category includes.**

**Action: Statistics team to include text with Tables 2.4a and 2.4b to clarify the meaning of the forecasts shown.**

**Action: Statistics team to consider adding a separate size category for mills producing over 100 thousand cubic metres of sawnwood per year in Table 2.8.**

**Action: Statistics team to investigate with relevant sawmills what is included in the “Other” product market category in Table 2.17a.**

**Action: Statistics team to draft additional accompanying text for Table 2.28, reflecting current trends in the certification of small private woodland, and circulate to the group for comment.**

**Action: Statistics team to check on FC removals that are not certified and amend table 2.28 and accompanying text, as required.**

**Action: Group to provide any further comments ASAP and by end August.**

#### **4. UNECE TIMBER SUBMISSIONS (Nick Moore/Sheila Ward)**

Nick Moore gave a short presentation on input required for the 2014 UK Market Statement.

**Action: Group to provide detailed input to Nick Moore by 4 September.**

**Action: Group to consider requirements for work on long-term demand forecasts, for discussion at the next meeting.**

The group provided estimates for 2014 and projections for 2015 for inclusion in the Timber Forecast Questionnaire for UNECE.

**Action: Statistics team to incorporate feedback from group on estimates and projections into return.**

#### **9. TIMBER PRICE INDICES (Alastair Sandels/Alastair Kerr)**

Alastair Sandels gave a presentation on the private sector standing sales timber price index currently being developed with IPD. Current industry supporters represent around 70% of the timber harvested. The sponsors aim to publish the first index in 2015.

The group then discussed the proposal, with some concerns raised over the level of detailed input required.

Alastair Kerr presented work by the WPIF and SKM Enviro on wood product price indices, which stemmed from a request by DECC and used data collected

by independent consultants. The indices are intended to be simple benchmarks, and will be updated periodically, probably next in 2016.

**Action: Jeremy Darot to circulate the Timber Price Indices presentations.**

## **7. SITKA SPRUCE RESTOCKING (Sheila Ward/Cameron Maxwell)**

Sheila Ward and Cameron Maxwell presented a paper on options for estimating the area of Sitka spruce restocking in Scotland, which is no longer grant aided. In the medium to long term, NFI data will be available. In the short term, a rough estimate could be calculated based on nursery survey data and softwood harvesting volumes, and possibly included in a footnote in FC statistics publications.

**Action: Statistics team to check availability of data on areas and volumes felled from FSC and PEFC websites.**

**Action: Cameron Maxwell/Sheila Ward to highlight the nursery statistics in the commentary accompanying restocking statistics.**

## **6. SCIENCE AND INNOVATION STRATEGY UPDATE / FMMF REVIEW (Roger Coppock/Peter Weston)**

Roger Coppock gave a brief overview of the FC Science and Innovation Strategy, and described the current and upcoming stages of the FC research commissioning process.

Peter Weston presented a draft of the research brief for Issue 5 of the Science and Innovation Strategy, which includes Forest Mensuration Modelling and Forecasting.

**Action: Group to provide any substantive comments to Roger Coppock and Peter Weston by the end of the day.**

## **5. TIMBER UTILISATION STATISTICS (Nick Moore)**

Nick Moore presented an update on his timber utilisation work, noting that 2013 estimates have been updated with firm estimates.

**Action: Jeremy Darot to circulate the Timber Utilisation Update presentation.**

## **8. AOB.**

- **NATIONAL FOREST INVENTORY UPDATE (Peter Weston)**

Peter Weston gave a short presentation on additional scenarios run by the NFI team to investigate potential ways to alleviate the future “dip” in softwood availability. Two reports (Scotland, GB) will be published, after the referendum on Scottish independence.

The group stated that they would like to check the drafts before publication.

**Action: Peter Weston to ask Ben Ditchburn to circulate drafts before publication.**

- **BIOMASS SUSTAINABILITY**

Following a brief discussion it was agreed that:

**Action: Cameron Maxwell to keep the group informed on the dialogue between the FC and DECC regarding definition issues (such as roundwood from thinning being included in residues).**

## **10. DATE OF NEXT MEETING**

Thursday 20 November 2014