

Figure 1. Percentage of woodland in active management (inc. PFE).



Figure 2: Measure of what is happening to the number and variety of species that live in woodland; using Woodland Birds data

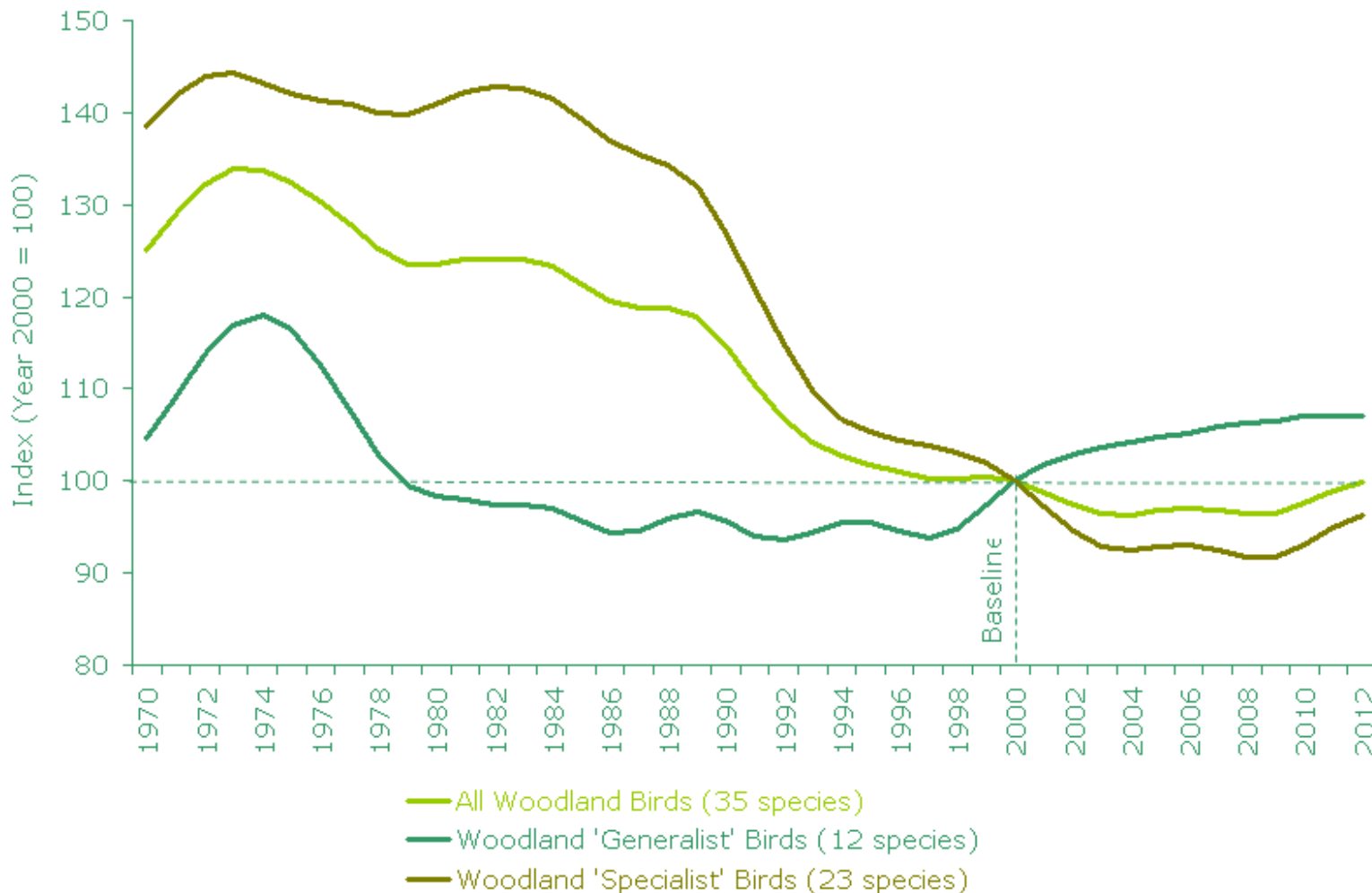




Figure 3.

Percentage of Woodland In Management excluding the Public Forest Estate

- 31% minimum to 43%
- 43% to 49% England Average
- 49% England Average to 54%
- 54% to 65% maximum

- Woodland Officer beats
- Forest Services Delivery Areas

Scale:	1:3,000,000	Date:	Oct 2014
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Strategic Development

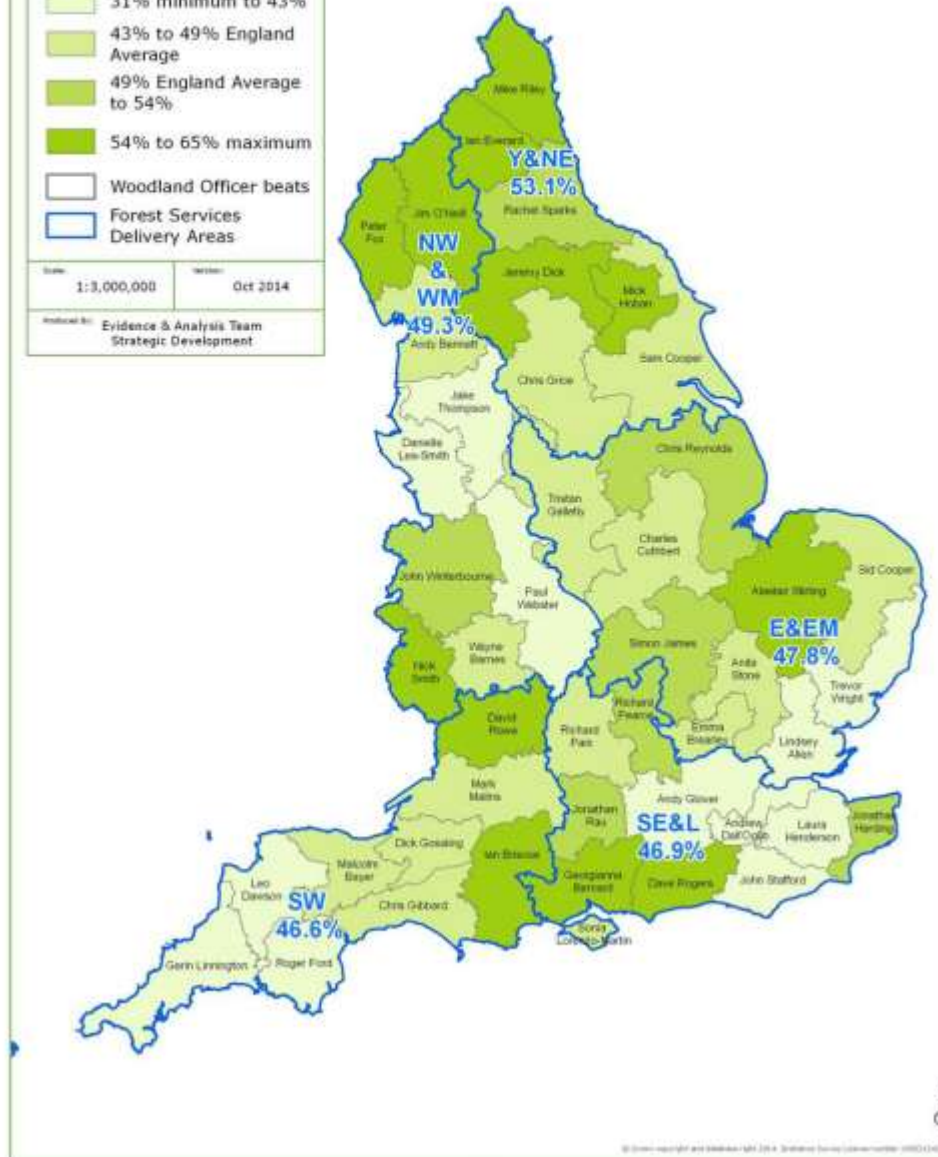
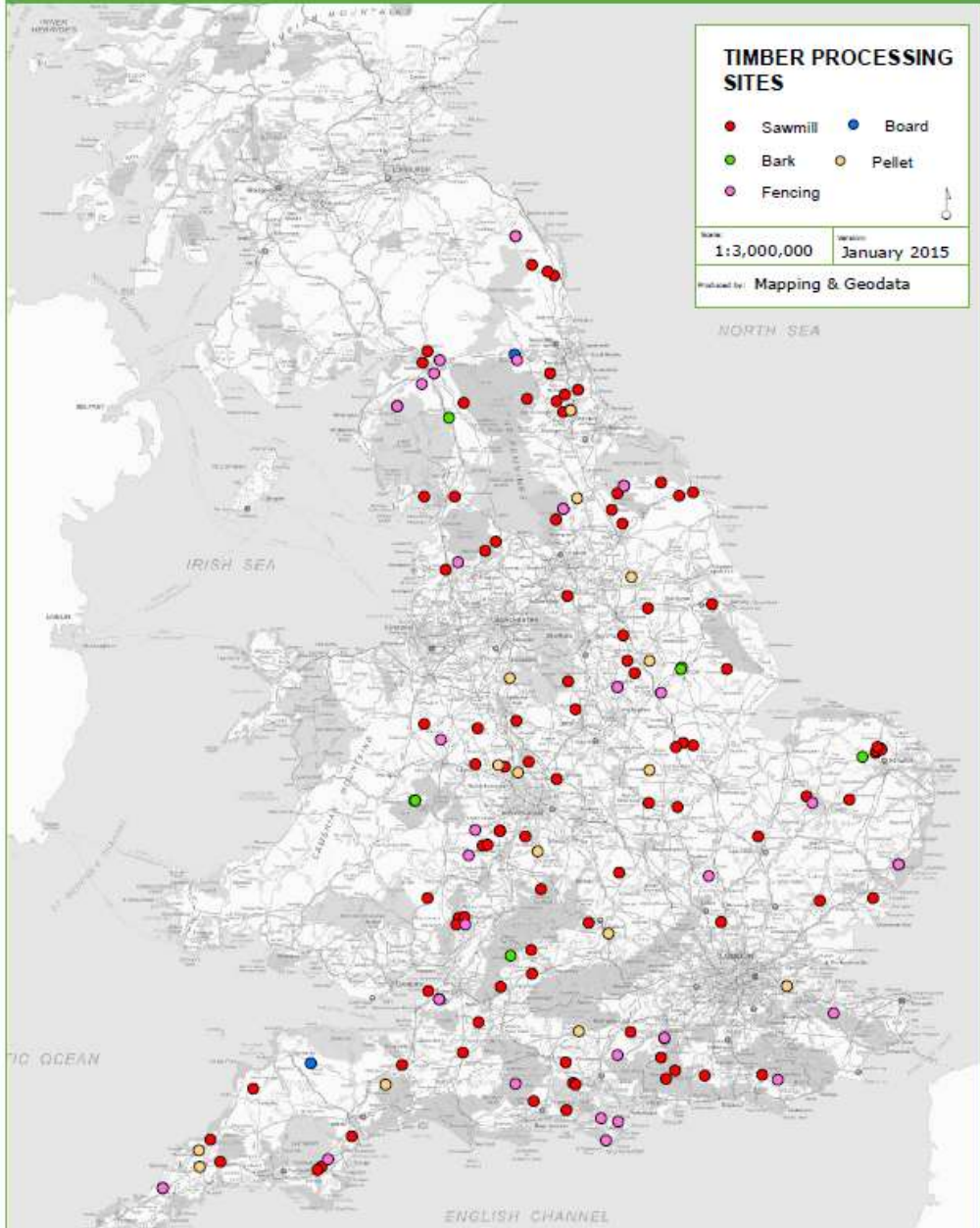
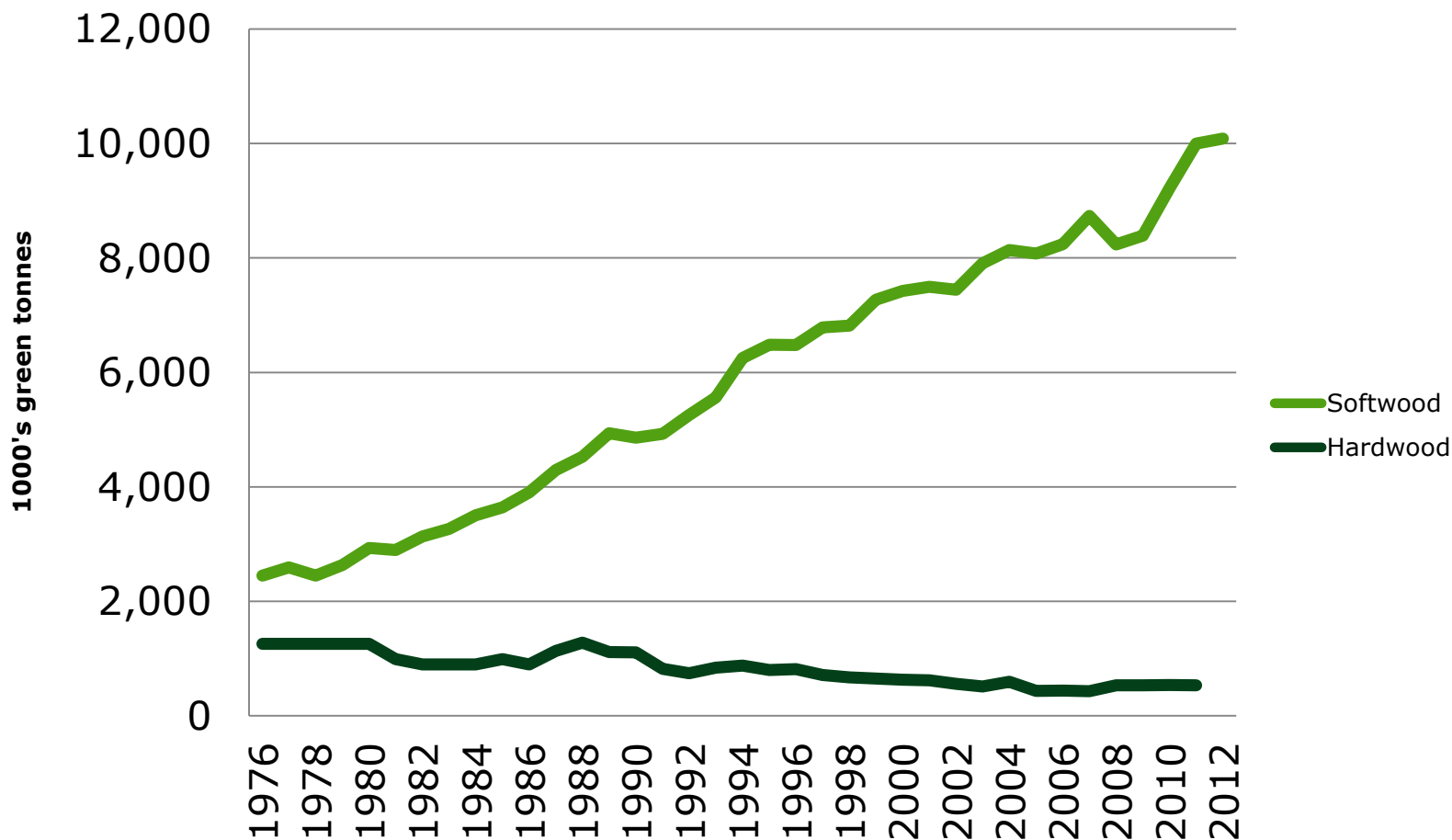


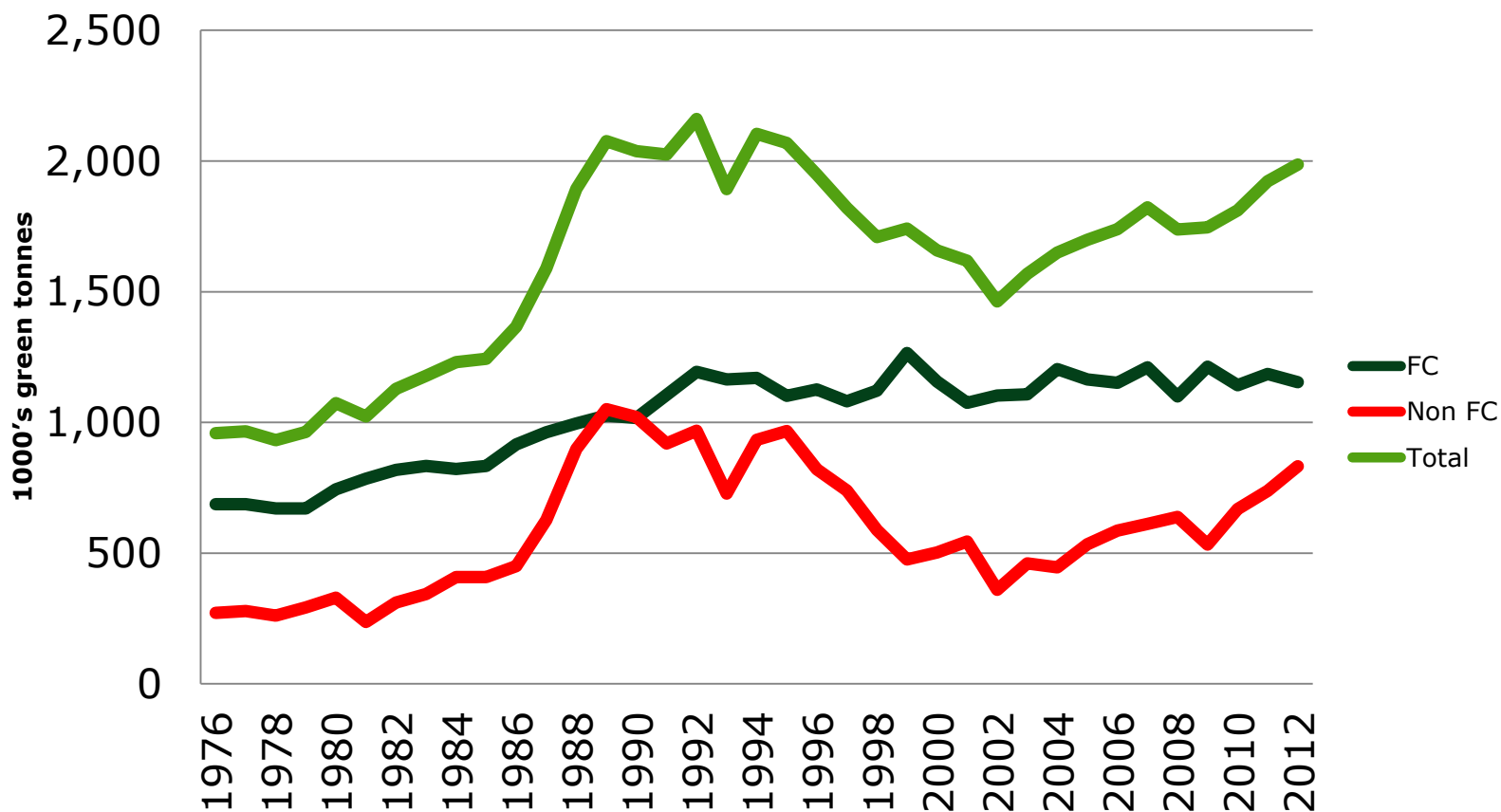
Figure 4.



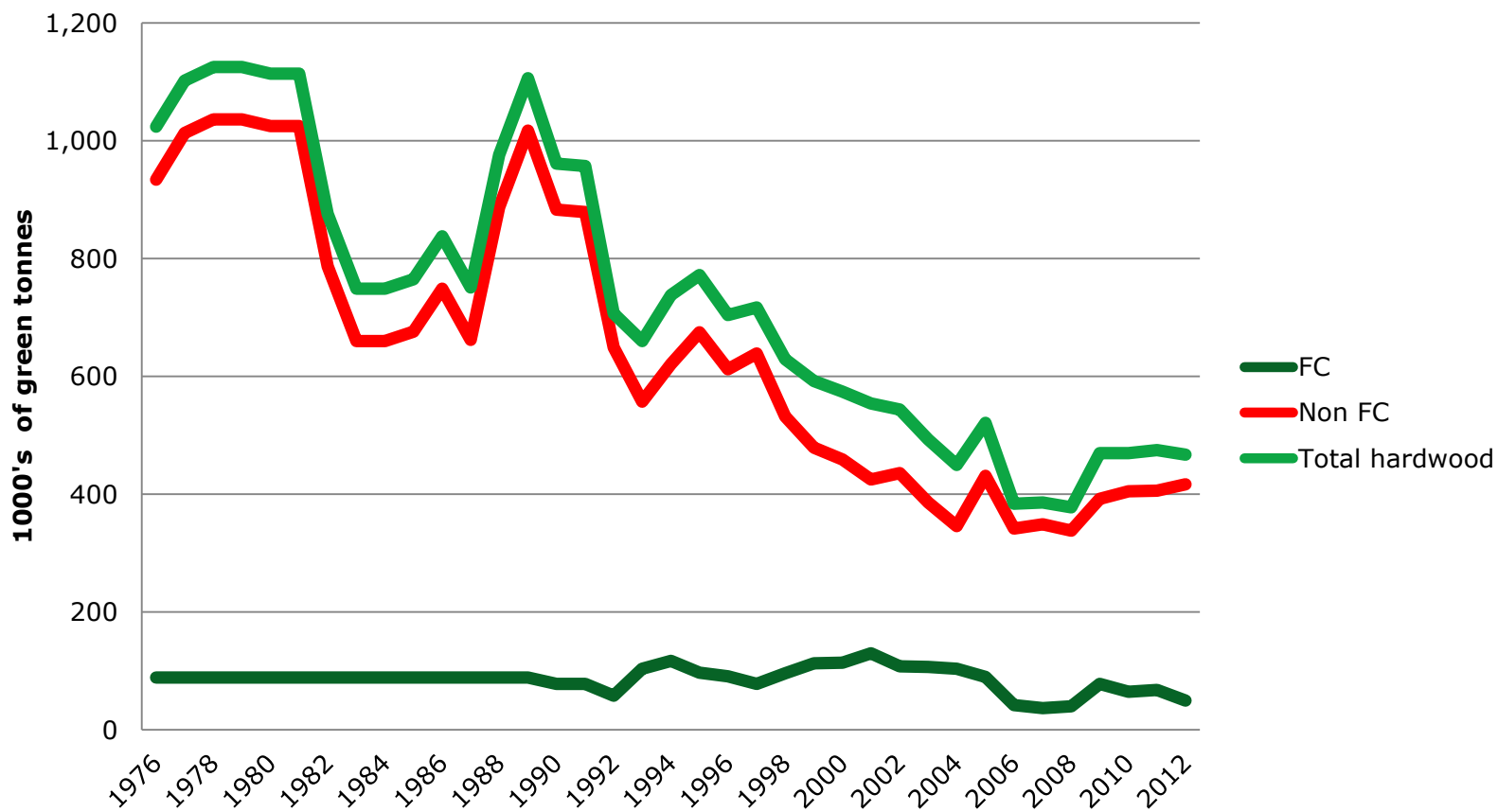
UK Timber deliveries 1976 - 2012



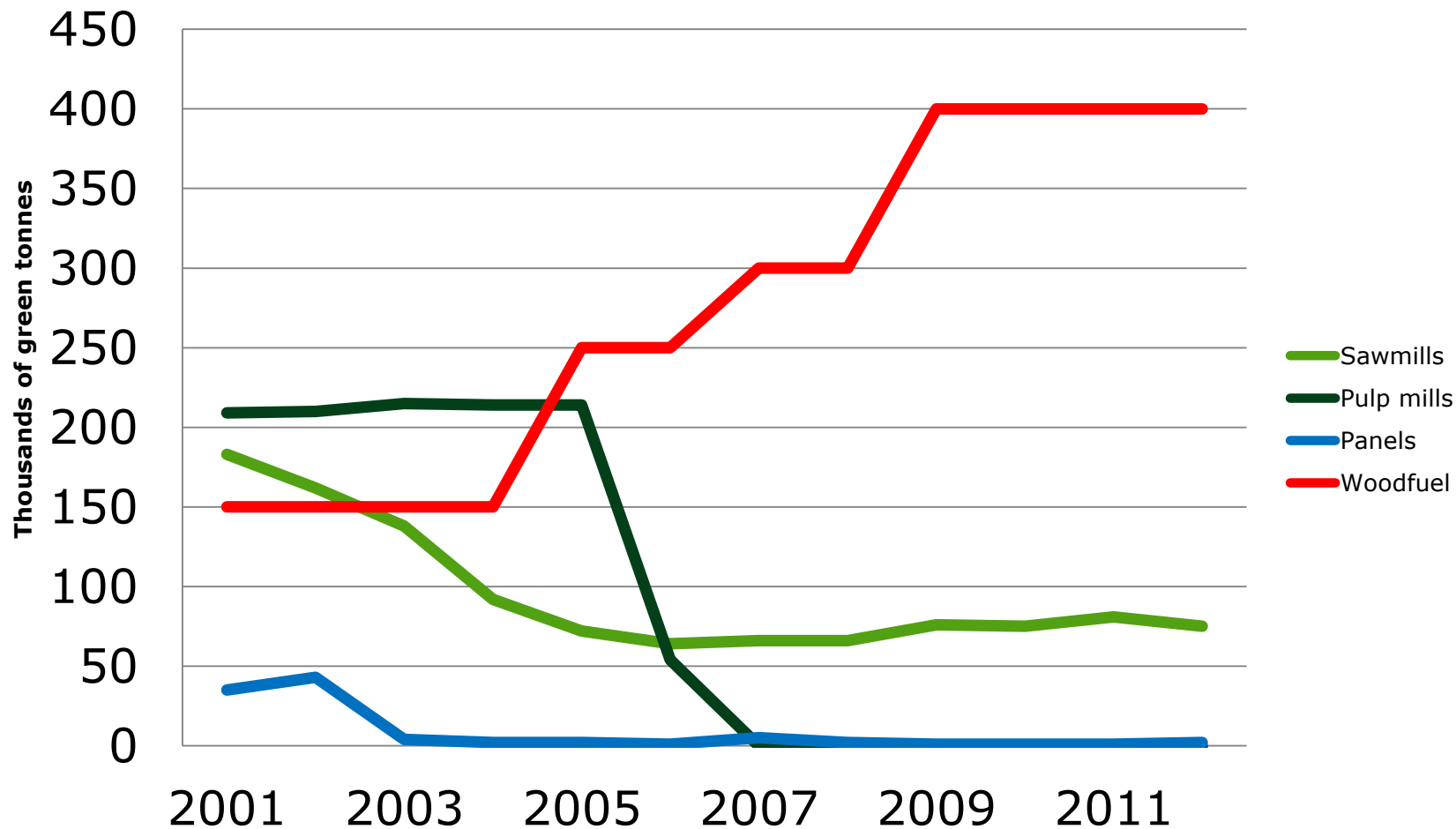
Softwood deliveries in England 1976 – 2012



English hardwood deliveries 1976 - 2012



UK hardwood deliveries 2001 - 2012



Annual RHI fuel requirement in England

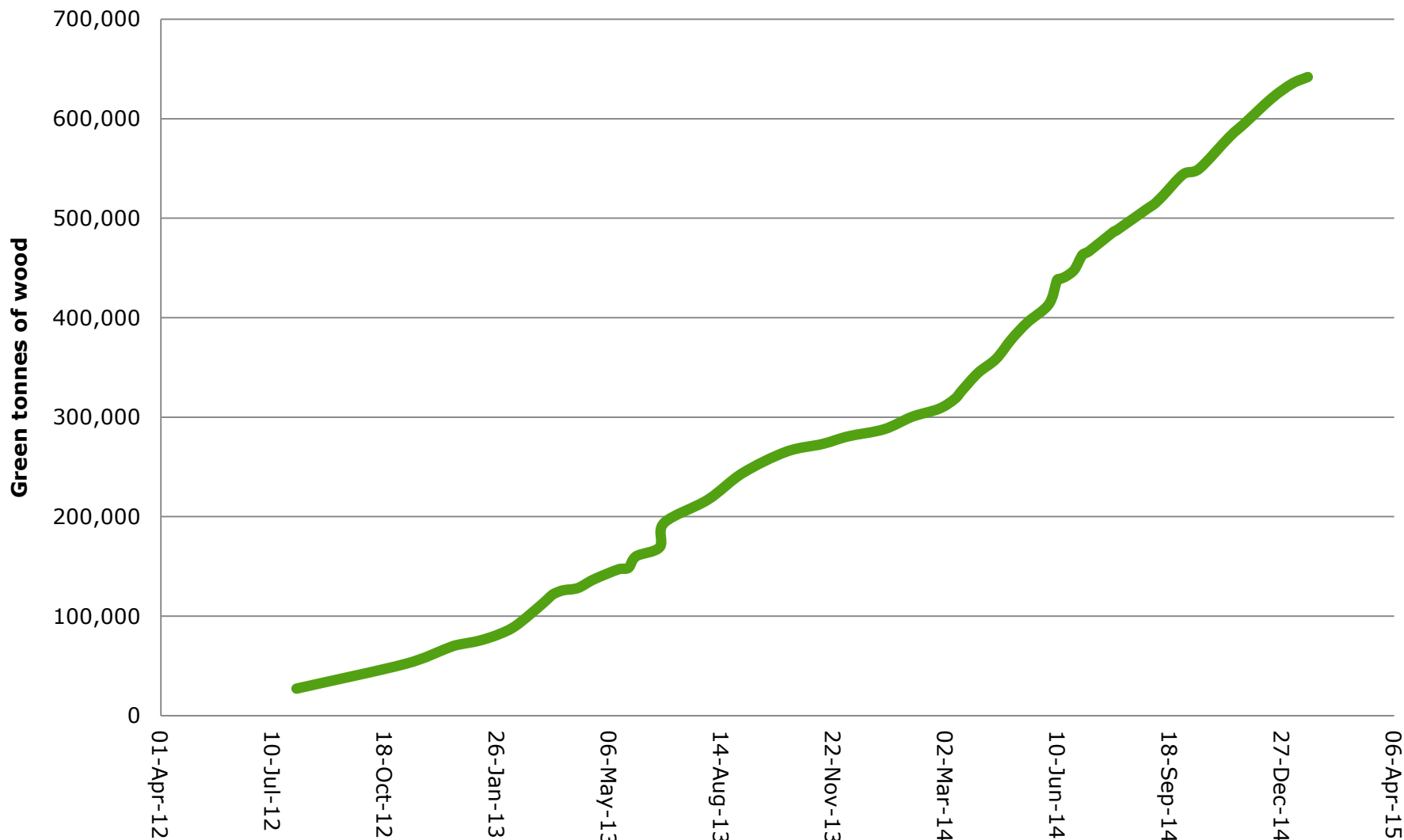
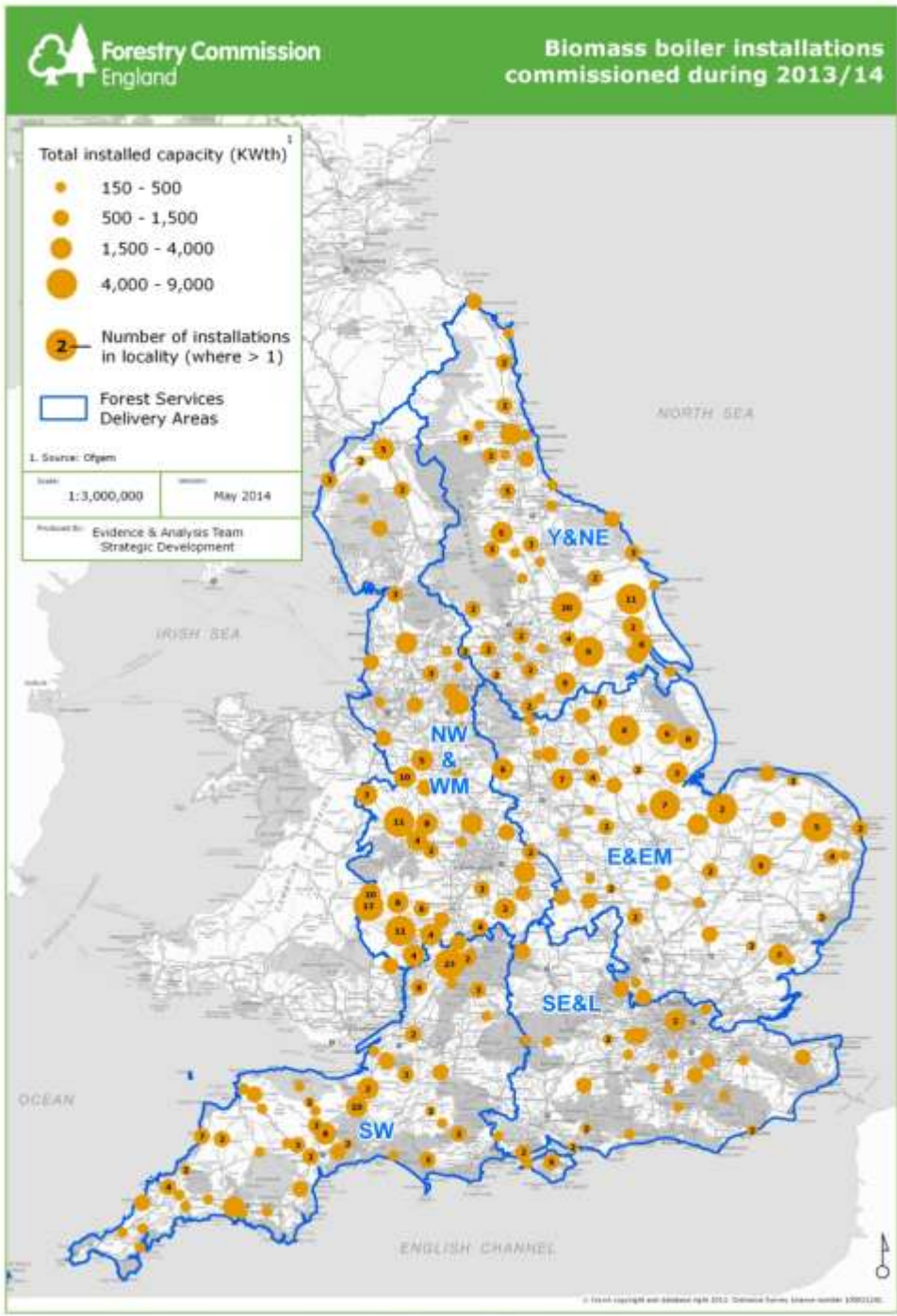
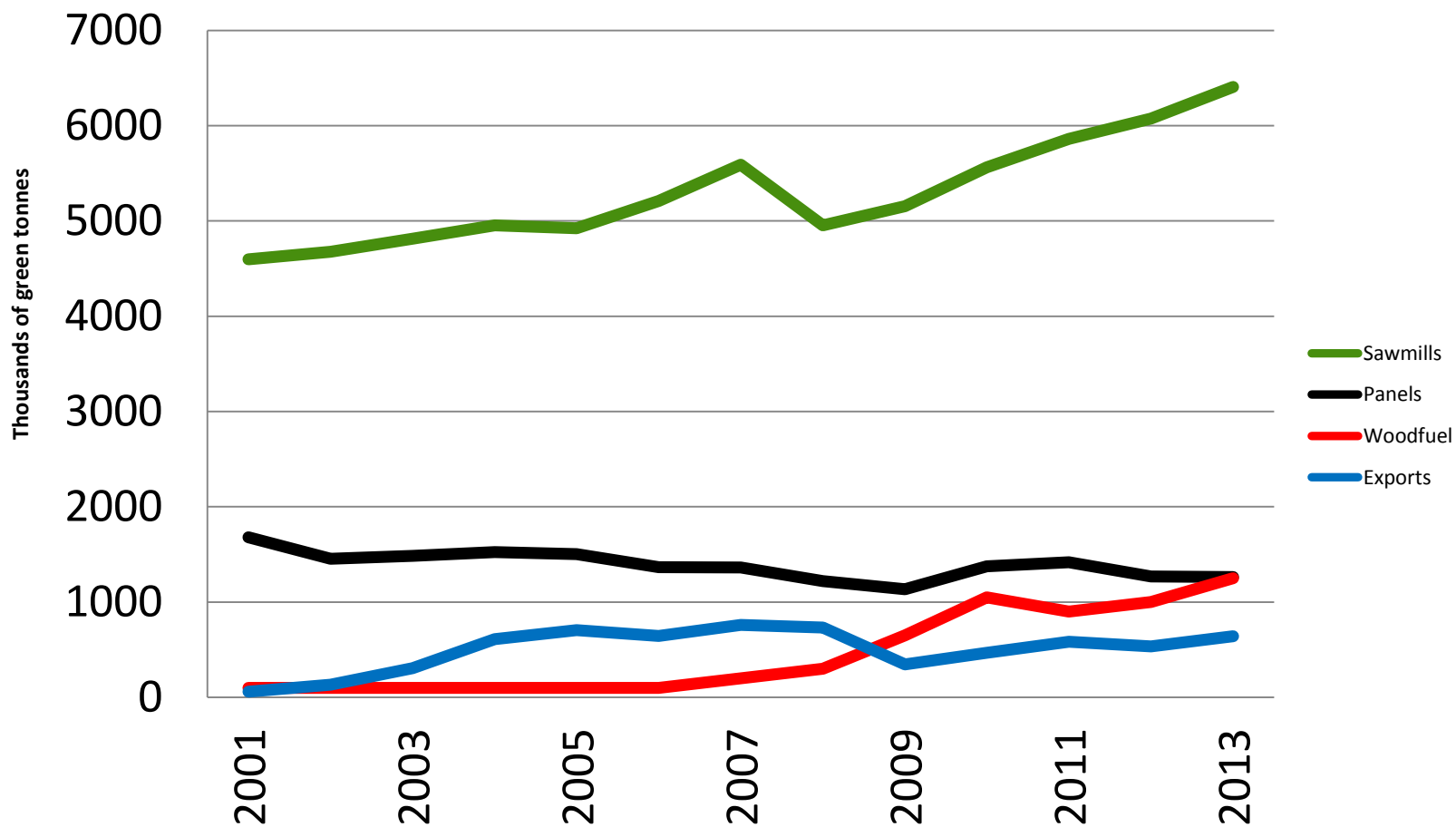


Figure 10.



Region	Full applications	
	Number	% of total
England	6,753	73%
South West	1,525	16%
West Midlands	921	10%
Yorkshire and the Humber	971	10%
North West	880	9%
South East	639	7%
East Midlands	795	9%
East of England	646	7%
North East	329	4%
London	47	1%
Scotland	1,655	18%
Wales	877	9%
Total	9,285	

UK softwood deliveries



Principal species	volume (000 m ³ obs)
South East England	
All conifers	3,541
Sitka spruce	41
Scots pine	767
Corsican pine	118
Norway spruce	3
Larches	1,231
Douglas fir	653
Lodgepole pine	0
Other conifers	744
All broadleaves	28,507
Oak	10,194
Beech	3,334
Sycamore	1,195
Ash	6,198
Birch	1,903
Sweet chestnut	934
Hazel	932
Hawthorn	24

Figure 13. Timber beyond Maximum Mean Annual Increment in private woodlands in SE England

- Woodland management plans are a reasonably simple, well understood and flexible means to encourage owners to bring their woodlands into sustainable management.
- Better knowledge of the woodland resource following publication of National Forest Inventory enables businesses to make informed decisions about how to invest in forestry supply chains.
- Operating at a time when other government departments are subsidising forest based supply chains (RHI) and international and domestic timber prices are increasing.
- Improving economic conditions and statistics showing increased deliveries of timber to market make it easier for FS and others to promote the concept of productive woodland management to business minded landowners.
- The approach has the backing of the wider sector given it's origins in the Forestry Policy Statement and Independent Forestry Panel's recommendations.
- Grown in Britain, a business developed with input from FS and with an FC board member, has stimulated some investment from the private sector to test new ways of getting more woods into management (e.g. Westwoods). Unlike previous initiatives Grown in Britain has received funding from private business and well as from Government.
- Synergies between Grown in Britain and Woods Into Management communications strategies provide clear messages to a wide range of audience, some of which are new to FS (e.g. UK Contractors Group).

Figure 15. Weaknesses of current Wood into Management programme.

- Uncertainty over the availability of cash budgets after 2015/16 make it difficult to plan strategically.
- There is a lack of a strategic plan for how we work with external project partners to deliver the shared vision for woods in active management over the long term. Some leadership from FS is still required.
- Results from a preliminary review suggest that too much staff time is spent on the woodland management plan approval process and rather than engaging owners, businesses and monitoring UKFS compliance in the field. The management plan risks becoming a bottleneck.
- It is not clear how much woodland that has been recently brought into a management plan is managed productively.
- Information on local market opportunities, resource availability, timber prices, harvesting/operational costs and how to find reputable forest management companies is not easy for staff or non expert woodland owners to find.
- Grown in Britain funding base not yet consolidated.
- Very significant dependency on woodfuel's continued growth, which could be put at risk by any withdrawal of the RHI, air quality concerns (unfounded or not) or sustained low oil prices.
- High dependency on continued RDPE funding for woodland management plans, which cannot be guaranteed beyond the current programme, or potentially sooner should the UK's relationship with Europe significantly change.

- Real or perceived administrative burden associated with management plans and felling licences. CAP reform or UK withdrawal from the EU leads to lack of grant support for forestry.
- Sense of helplessness following a major storm or disease event cause widespread damage to forestry, leading to abandonment of managed woodland.
- Availability of cheap timber as exchange rates change or new sustainable plantations are established in the tropics where annual increment is high and return on investment can be short.
- Softwood sawmills leave UK as softwood availability declines and conifer woodland creation remains close to zero, leading to reduced market opportunity for growers and increased levels of abandoned conifer forests.
- Oil price remains low leading to reduced demand for woodfuel and increased availability of plastics and other oil based materials to replace wood. Rate of growth of woodfuel markets slows or stops following withdrawal of RHI under new government (driven by economics or air quality concerns).

- Looking ahead to 2050 the following factors that increase interest in/need for active woodland management may come into play:
- Timber demand could increase rapidly over next 35 years as the global population approaches 9 billion – WWF forecasts demand will triple by 2050.
- Increasingly erratic fossil fuels prices, on an overall upward trend, pushes up value of woodlands and timber prices. CAP reform reduces profitability of some farming land uses and makes forestry a more attractive option.
- Demand for British timber increases as Grown in Britain becomes established and developments in wood based biocomposites, wood based liquid fuels and nanocellulose accelerates.
- The frequency of extreme weather events including high wind speeds and droughts is likely to increase. The impact of tree diseases such as *Chalara* will be more visible in the landscape as mature trees die. New pests and diseases arrive or become established in the UK.
- More political effort put into reducing trade and materials deficits (the UK is the world's third biggest importer of wood behind China and Japan).
- Increasing awareness of the regulating and provisioning services provided by forests and woodlands – a 'wood culture' is developed.