

EXPERT GROUP ON TIMBER AND TRADE STATISTICS

**Minutes of the meeting held in Silvan House, 231 Corstorphine Road,
Edinburgh, on Thursday 18 April 2013**

Present: Alan Christison, Roger Coppock, Jeremy Darot (Secretary), Chris Inglis, Cameron Maxwell, Nick Moore, Richard Palmer, John Paterson, David Sulman, Sheila Ward, George Webb, Peter Weston (Chair), Tony Willis

Apologies: Alan Corson, Neil Cowan, Michael Fairgrieve, David Leslie, Nigel Manley

1. APPROVAL OF PREVIOUS MINUTES (22 November 2012)

The minutes were agreed.

2. MATTERS ARISING

A. Actions completed since the last meeting

Jeremy Darot: "FC price data only" is now specified on the FC statistics website when referring to timber price data.

Jeremy Darot: a link to RPI and CPI data on the ONS website is now provided from the FC timber statistics page.

Statistics team: draft reports of the sawmill survey and UK wood production reviews were sent to the group.

Group: positive feedback was provided on the draft reports, which have since been published on the FC statistics website.

Statistics team: the value of the surveys to recipients was further stressed in the covering letters, in order to encourage response.

Statistics team: more follow-up phone calls were made to large non-respondents, with good results so far (8 returns resulting from 11 calls).

Statistics team: the response received for the sawmill survey long questionnaire question 4 item (d) (Furniture) was reviewed and found to be limited. The item was dropped from the questionnaire as a separate category.

Statistics team: the explanatory sentence for the sawmill survey questionnaires question 5 (Other products) was shortened.

Statistics team: the breakdown of the sawmill survey short questionnaire question 3 (Other products) is now given as percentages instead of quantities, in line with the long questionnaire.

Statistics team: the explanatory sentence for the survey of round fencing manufacturers question 2 (Production) was shortened to "This should include all of these products from the site".

Statistics team: stumps have been dropped from the brash & stumps enquiry.

Group: the survey distribution lists were reviewed, but no amendments were sent to the statistics team. See follow-up in Agenda item 3.

Jeremy Darot: an electronic version of Roger Coppock's plant health update paper was sent to the group.

B. Actions outstanding

Action: Jeremy Darot to present weighted survey response rates at the August 2013 meeting.

Action: Jeremy Darot to clarify units used in JQ return in future papers.

Action: Review of FC timber price data. The main issue relates to the treatment of long-term contracts in sale unit prices and timber price indices. HMOs have agreed that sale unit prices and timber price indices should be adjusted to reflect price adjustments in long term contracts, subject to making relevant software amendments. These changes are not difficult, but they are also not simple and getting access to resources for this work is proving problematic.

Sheila Ward / Peter Weston to update the group on progress.

3. STATISTICS (Sheila Ward / Jeremy Darot)

Sheila Ward and Jeremy Darot gave an update on the current status of the industry surveys, presented the initial estimates and sought feedback from the group. Survey response rates were similar to last year, with the exception of the pellet survey (which had a lower response rate). *UK Wood Production and Trade: 2012 provisional figures* will be published on 16 May.

A list of large non-respondents was circulated, and the pellet distribution list was reviewed by the group.

Discussion of the draft figures covered the following points:

- The increasing discrepancy between softwood removals and deliveries;
- The impact on the figures resulting from the closure of Sonae;
- The woodfuel category is likely to include some non-woodfuel uses (e.g. roundwood for pellet manufacture);
- There has been little impact on hardwood removals from chalara;
- The possible use of data from the Wood Recyclers Association in estimates of exports.

Action: Jeremy Darot to circulate the list of contact names for the industry surveys.

Action: group to check the list of contact names and send amendments to the statistics team.

Action: group to help with encouraging more responses from non-respondents.

Action: Sheila Ward and Cameron Maxwell to update the group on developments in woodfuel statistics at the August meeting.

Action: Statistic team to provide additional explanations on what the “wood fuel” category includes in Table 2 of *UK Wood Production and Trade*.

Action: Statistics team to add “and pellets” to Table 11 Note 2 of *UK Wood Production and Trade*.

Action: Statistics team to consider using Wood Recyclers Association data to estimate exports figures.

4. TIMBER PRICE INDICES (John Paterson)

John Paterson presented a paper outlining ways in which several industry timber price indices could potentially be produced. The paper acknowledged the obstacles faced, including information security, trust in the data provided, and costs. The group stressed the need to understand the exact purpose and benefits of producing such indices, whether the focus should be on end product values, and the need for a solid commitment from the most important players in the relevant market. Some members stated that they may not be willing to participate.

Action: group to give feedback to John Paterson on the paper by email.

Action: John Paterson to take on board feedback received and prepare a revised proposal and present it to the group at the August meeting.

5. TIMBER UTILISATION UPDATE (Nick Moore)

Nick Moore presented an update on his timber utilisation work, including initial estimates for 2012.

6. PLANT HEALTH UPDATE (Roger Coppock)

Roger Coppock presented a paper highlighting recent tree health developments.

7. NATIONAL FOREST INVENTORY UPDATE (Ben Ditchburn)

Ben Ditchburn updated the group on the progress of the NFI. He asked the group whether they would be willing to take on a formal quality assurance role in relation to some NFI outputs. This role is expected to be covered as part of existing EGTTTS meetings. The group agreed, and expressed particular interest in

future NFI removals estimates and how they compare to the statistics the group currently quality-assures, as well as in future removal forecasts.

8. AOB

i. David Sulman asked Roger Coppock about current work by the FC on alternative tree species in the context of climate change and industry needs. Roger Coppock said that a broad palette of species is currently being considered.

Action: Roger Coppock to present a paper on this topic at a future meeting.

ii. John Paterson recently saw some European statistics illustrating the sustainability of wood resources by expressing it in terms of the quantity regenerated per minute. He suggested that the FC statistics team could consider presenting wood production figures in this format.

iii. Peter Weston raised the issue of representation in the group by Wales, following the transfer of FC Wales functions to Natural Resources Wales and the Welsh Government.

Action: Peter Weston to seek nominations for an EGTTS representative from NRW/WG.

9. DATE OF NEXT MEETING (AND REMAINING FOR 2013)

Thursday 15 August 2013

Thursday 21 November 2013