


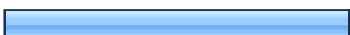

1. Are you a woodland owner, or directly employed by a woodland owner (e.g. farmer, estate owner, local authority)? NB - If you manage woodlands on behalf of this type of owner but are not directly employed by them, tick 'No' and complete the Forestry Manager/Agent survey.

		Response Percent	Response Count
Yes		32.3%	10
No		67.7%	21
answered question			31
skipped question			0




2. How much woodland do you own in the Marches? Ha - Hectare. 1 Ha = 2.48 Acres

		Response Percent	Response Count
<10		22.2%	2
10 - <20		22.2%	2
20 - <50		11.1%	1
50 - <100		11.1%	1
<100		0.0%	0
100 - <500		11.1%	1
500 and >		22.2%	2
answered question			9
skipped question			22



3. Are these woodlands?

		Response Percent	Response Count
All broadleaf		22.2%	2
Predominantly (i.e. > 80%) broadleaf		55.6%	5
Mixed broadleaf & conifer		22.2%	2
Predominantly (i.e. > 80%) conifer		0.0%	0
All conifer		0.0%	0
answered question			9
skipped question			22


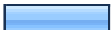
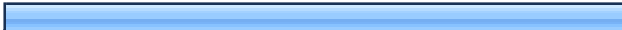
4. Which of these statements best describes your knowledge of woodland management?

		Response Percent	Response Count
I am a professional forester/land manager and/or experienced land owner with extensive knowledge of woodland management		37.5%	3
I am an enthusiastic woodland owner with a good appreciation of woodland management		50.0%	4
I have a general understanding of the principles regarding woodland management but limited knowledge of how to put these into practice		0.0%	0
I have little or no knowledge regarding woodland management		12.5%	1
answered question			8
skipped question			23

5. In the last five years how has the extent of your woodland management changed?

		Response Percent	Response Count
Increased		66.7%	6
Stayed the same		33.3%	3
Decreased		0.0%	0
answered question			9
skipped question			22

6. Is this because? Tick all that apply

		Response Percent	Response Count
Improved timber prices		0.0%	0
A new market not previously available		16.7%	1
Better grants		16.7%	1
More contractors available		0.0%	0
Personal circumstances		100.0%	6
Other (please specify)			1
answered question			6
skipped question			25

7. Is this because? Tick all that apply

	Response Percent	Response Count
Lack of market	0.0%	0
Shortage of suitable contractors	0.0%	0
Regulations	0.0%	0
Complexity of Grant Aid	0.0%	0
Personal Circumstances	0.0%	0
Other (please specify)		0
answered question		0
skipped question		31



8. Which of these markets are important to you as a timber grower?

	Not relevant	Not very important	Fairly important	Very important	Response Count
Sawmills	55.6% (5)	22.2% (2)	0.0% (0)	22.2% (2)	9
Pulp/Board Mills	62.5% (5)	12.5% (1)	12.5% (1)	12.5% (1)	8
Woodfuel - large scale (e.g. electricity production/CHP)	50.0% (4)	37.5% (3)	0.0% (0)	12.5% (1)	8
Woodfuel - small to medium scale (e.g. heat only boiler)	0.0% (0)	14.3% (1)	57.1% (4)	28.6% (2)	7
Firewood	0.0% (0)	0.0% (0)	66.7% (6)	33.3% (3)	9
Other (please specify)					3
answered question					9
skipped question					22


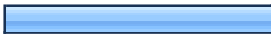


9. Which of these are currently a constraint to managing your woodland?

	Not a constraint	Minor constraint but can overcome	Significant constraint that limits management	Constraint that prevents management	Response Count
Timber prices	25.0% (2)	50.0% (4)	12.5% (1)	12.5% (1)	8
Markets	50.0% (4)	12.5% (1)	37.5% (3)	0.0% (0)	8
Suitable contractors	50.0% (4)	25.0% (2)	25.0% (2)	0.0% (0)	8
Complexity of grant aid	37.5% (3)	25.0% (2)	25.0% (2)	12.5% (1)	8
Regulations	42.9% (3)	42.9% (3)	0.0% (0)	14.3% (1)	7
Access to/within woodland	22.2% (2)	22.2% (2)	11.1% (1)	44.4% (4)	9
Public Highway access	44.4% (4)	22.2% (2)	22.2% (2)	11.1% (1)	9
				Other (please specify)	0
				answered question	9
				skipped question	22




10. Are you a forestry contractor?

		Response Percent	Response Count
Yes		25.8%	8
No		74.2%	23
		answered question	31
		skipped question	0

11. Including yourself, how many people do you employ? Include sub-contractors if they work only for you.

		Response Percent	Response Count
1		14.3%	1
2 - 5		42.9%	3
6 - 10		28.6%	2
11 - 20		14.3%	1
21 - 50		0.0%	0
50 +		0.0%	0
answered question			7
skipped question			24

12. What proportion of your work (by % turnover) is within the Marches?

		Response Percent	Response Count
All or nearly all (i.e. >80%)		42.9%	3
Most (i.e. > 50%)		0.0%	0
Some (i.e. < 50%)		28.6%	2
None or very little (<20%)		28.6%	2
answered question			7
skipped question			24

13. What proportion of your work (by % turnover) is spent on the following activities

	> 90%	50% - 89%	20 - 49%	<20%	Response Count
Forest Establishment (planting, weeding etc)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (1)	1
Forest Management (maintenance)	0.0% (0)	40.0% (2)	20.0% (1)	40.0% (2)	5
Harvesting (thinning and clear fell)	16.7% (1)	50.0% (3)	16.7% (1)	16.7% (1)	6
Tree Surgery	33.3% (1)	0.0% (0)	33.3% (1)	33.3% (1)	3
Non-forestry activities	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (3)	3
answered question					7
skipped question					24

14. Which are the most important markets, in terms of volume, for the timber you harvest from woodlands in the Marches?

	Very important	Quite important	Not very important	Not at all important	Response Count
Firewood (for use in open fires or stoves)	28.6% (2)	42.9% (3)	14.3% (1)	14.3% (1)	7
Woodfuel (for use as chip, logs or pellets in boilers)	0.0% (0)	20.0% (1)	20.0% (1)	60.0% (3)	5
Energy (CHP or bio-energy plants)	0.0% (0)	0.0% (0)	0.0% (0)	100.0% (4)	4
Panel board manufacturing	20.0% (1)	0.0% (0)	0.0% (0)	80.0% (4)	5
Sawmills	40.0% (2)	0.0% (0)	20.0% (1)	40.0% (2)	5
Other	75.0% (3)	0.0% (0)	0.0% (0)	25.0% (1)	4
Other (please specify)					3
answered question					7
skipped question					24

15. How do you see your forestry related business progressing in the next five years?

	Increase	Stay about the same	Decrease	Response Count
Turnover	71.4% (5)	14.3% (1)	14.3% (1)	7
Profitability	33.3% (2)	50.0% (3)	16.7% (1)	6
Investment (new machinery, processes etc)	80.0% (4)	20.0% (1)	0.0% (0)	5
Employees	50.0% (3)	33.3% (2)	16.7% (1)	6
			answered question	7
			skipped question	24

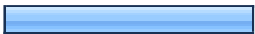

16. Where do the main opportunities lie for your business?

	Very important	Quite important	Not very important	Not at all important	Response Count
Growing your existing business i.e. more of the same	57.1% (4)	28.6% (2)	14.3% (1)	0.0% (0)	7
Diversifying into new types of work i.e. new services offered to existing or new clients	66.7% (4)	33.3% (2)	0.0% (0)	0.0% (0)	6
Adding value to the products and/or services you currently provide e.g. processing roundwood into firewood	83.3% (5)	16.7% (1)	0.0% (0)	0.0% (0)	6
Extending the geographic area you serve	20.0% (1)	20.0% (1)	40.0% (2)	20.0% (1)	5
			Other (please specify)		0
			answered question		7
			skipped question		24

17. What are the main barriers to growing your business

	Very important	Important	Quite important	Not at all important	N/A	Rating Average	Response Count	
Finding suitable woodlands to work in	33.3% (2)	33.3% (2)	0.0% (0)	16.7% (1)	16.7% (1)	2.00	6	
Lack of markets for timber	20.0% (1)	20.0% (1)	20.0% (1)	20.0% (1)	20.0% (1)	2.50	5	
Suitable skilled labour	28.6% (2)	42.9% (3)	28.6% (2)	0.0% (0)	0.0% (0)	2.00	7	
Finance to invest in new machinery	42.9% (3)	28.6% (2)	28.6% (2)	0.0% (0)	0.0% (0)	1.86	7	
Personal preference - you're comfortable as things are now	25.0% (1)	0.0% (0)	50.0% (2)	25.0% (1)	0.0% (0)	2.75	4	
Other (please describe below)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.00	0	
					Other		0	
							answered question	7
							skipped question	24

18. Are you a forestry manager and/or agent?

		Response Percent	Response Count	
Yes		40.0%	12	
No		60.0%	18	
			answered question	30
			skipped question	1



19. What proportion of the area you manage is within the Marches?

		Response Percent	Response Count
All or nearly all (i.e. >80%)		70.0%	7
Most (i.e. > 50%)		0.0%	0
Some (i.e. < 50%)		20.0%	2
None or very little (<20%)		10.0%	1
answered question			10
skipped question			21

20. Evidence suggests that a significant proportion of woodland in the Marches is undermanaged. In relation to timber harvesting, where do you think the main opportunities lie for improving the area of woodland under sustainable management?

	Very important	Quite important	Not very important	Not at all important	N/A	Rating Average	Response Count
New markets (e.g. engineered timber)	30.0% (3)	40.0% (4)	30.0% (3)	0.0% (0)	0.0% (0)	2.00	10
Expansion of existing markets (e.g. woodfuel)	50.0% (5)	50.0% (5)	0.0% (0)	0.0% (0)	0.0% (0)	1.50	10
Better prices paid by existing markets	70.0% (7)	30.0% (3)	0.0% (0)	0.0% (0)	0.0% (0)	1.30	10
Greater availability of suitable contractors	36.4% (4)	27.3% (3)	36.4% (4)	0.0% (0)	0.0% (0)	2.00	11
Investment in better access to/within woodlands	54.5% (6)	45.5% (5)	0.0% (0)	0.0% (0)	0.0% (0)	1.45	11
Other (please describe below)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	0.00	0
Other (please specify)							1
answered question							11
skipped question							20



21. Assuming no practical constraints, is there potential to harvest more timber than you currently do from the woodlands you manage?

		Response Percent	Response Count
Yes		90.9%	10
No		9.1%	1
answered question			11
skipped question			20

22. How important are the following issues in limiting the amount of timber you harvest from these woodlands?

	Very important	Quite important	Not very important	Not at all important	N/A	Rating Average	Response Count
Lack of markets	0.0% (0)	40.0% (4)	40.0% (4)	20.0% (2)	0.0% (0)	2.80	10
Poor prices paid by markets	27.3% (3)	36.4% (4)	18.2% (2)	18.2% (2)	0.0% (0)	2.27	11
Lack of suitable contractors	36.4% (4)	18.2% (2)	27.3% (3)	18.2% (2)	0.0% (0)	2.27	11
Poor access to/within woodlands	36.4% (4)	36.4% (4)	18.2% (2)	9.1% (1)	0.0% (0)	2.00	11
Regulations	18.2% (2)	27.3% (3)	18.2% (2)	36.4% (4)	0.0% (0)	2.73	11
Other (please describe below)	100.0% (1)	0.0% (0)	0.0% (0)	0.0% (0)	0.0% (0)	1.00	1
						Other	1
answered question							11
skipped question							20



23. Are you a timber processor (e.g. sawmill, firewood supplier, animal bedding etc.) ?

		Response Percent	Response Count
Yes		56.7%	17
No		43.3%	13
answered question			30
skipped question			1

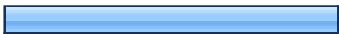



24. Which of these describes your business?

	Primary	Secondary	N/A	Rating Average	Response Count
Sawmill	33.3% (2)	33.3% (2)	33.3% (2)	1.50	6
Board manufacturer	0.0% (0)	0.0% (0)	100.0% (5)	0.00	5
Round fencing producer	16.7% (1)	16.7% (1)	66.7% (4)	1.50	6
Woodfuel producer (chips, pellets etc)	0.0% (0)	0.0% (0)	100.0% (4)	0.00	4
Firewood producer	60.0% (6)	40.0% (4)	0.0% (0)	1.40	10
Equestrian/Horticultural supplies producer	0.0% (0)	20.0% (1)	80.0% (4)	2.00	5
Other (please describe below)	57.1% (4)	0.0% (0)	42.9% (3)	1.00	7
				Other	6
answered question					13
skipped question					18




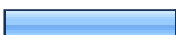
25. Is your business located within the Marches?

		Response Percent	Response Count
Yes		76.9%	10
No - but within 20 miles		23.1%	3
No		0.0%	0
answered question			13
skipped question			18

26. How much of your timber do you source from within the Marches?

		Response Percent	Response Count
> 90%		53.8%	7
50% - 89%		7.7%	1
20% - 49%		15.4%	2
< 20%		23.1%	3
answered question			13
skipped question			18





27. Do you buy softwood or hardwood?

		Response Percent	Response Count
All softwood		0.0%	0
Mainly softwood but some hardwood		27.3%	3
A mix		9.1%	1
Mainly hardwood but some softwood		36.4%	4
All hardwood		27.3%	3
	Comment		4
answered question			11
skipped question			20

28. How do you envisage this business progressing in the next five years?

	Increase	Stay about the same	Decrease	Response Count
Turnover	69.2% (9)	30.8% (4)	0.0% (0)	13
Profitability	33.3% (4)	58.3% (7)	8.3% (1)	12
Investment (new machinery, processes etc)	61.5% (8)	30.8% (4)	7.7% (1)	13
Employees	50.0% (6)	33.3% (4)	16.7% (2)	12
	What are the reasons for your answer (optional)?			5
answered question				13
skipped question				18

29. Which of the following best describes how you envisage your timber use going in the next 5 - 10 years?

		Response Percent	Response Count
Increasing		69.2%	9
Staying the same, but adding value		15.4%	2
Staying the same		7.7%	1
Decreasing		7.7%	1
Other (please specify)			1
answered question			13
skipped question			18

30. How important would the following be in encouraging you to source more timber from the Marches?

	Very important	Quite important	Not very important	Not at all important	N/A	Rating Average	Response Count
Better information on where timber is, who owns it etc.	46.2% (6)	15.4% (2)	7.7% (1)	7.7% (1)	23.1% (3)	1.70	13
Larger sales parcels	7.7% (1)	15.4% (2)	30.8% (4)	15.4% (2)	30.8% (4)	2.78	13
Improved contractor availability	7.7% (1)	30.8% (4)	38.5% (5)	0.0% (0)	23.1% (3)	2.40	13
Better access to woodlands	46.2% (6)	15.4% (2)	15.4% (2)	7.7% (1)	15.4% (2)	1.82	13
answered question							13
skipped question							18

31. Do you have any other comments you wish to make regarding the Marches Timber Study?

**Response
Count**

9

answered question 9

skipped question 22

32. If you wish to be sent a copy of the draft report for your comments please leave your e-mail address here.

**Response
Count**

16

answered question 16

skipped question 15

33. To enter the draw for a £30 voucher to spend on tree or woodland related books at www.treesource.co.uk, please enter your e-mail address here.

**Response
Count**

18

answered question 18

skipped question 13

Page 5, Q1. Is this because?

Tick all that apply

- | | | |
|---|--|-----------------------|
| 1 | I became directly responsible for the various woodland holdings which were previously managed by a relative, now deceased. | Nov 20, 2012 12:17 PM |
|---|--|-----------------------|

Page 7, Q1. Which of these markets are important to you as a timber grower?

- | | | |
|---|---|-----------------------|
| 1 | air dried hard woods | Nov 22, 2012 2:26 PM |
| 2 | We have our own woodchip heating system | Nov 20, 2012 4:23 PM |
| 3 | We do our own sawmilling Selling to sawmills is a fools errand You clearly do not understand that as you make no provision for owners doing their own milling | Nov 16, 2012 10:49 AM |

Page 9, Q4. Which are the most important markets, in terms of volume, for the timber you harvest from woodlands in the Marches?

- | | | |
|---|--|-----------------------|
| 1 | Fencing | Nov 20, 2012 12:52 AM |
| 2 | Fencing products. | Nov 16, 2012 6:08 PM |
| 3 | Own milled and cleft timber direct to end user | Nov 16, 2012 10:39 AM |

Page 11, Q2. Evidence suggests that a significant proportion of woodland in the Marches is undermanaged. In relation to timber harvesting, where do you think the main opportunities lie for improving the area of woodland under sustainable management?

- | | | |
|---|---|----------------------|
| 1 | Land type makes many woodlands uneconomical to manage | Nov 21, 2012 3:39 PM |
|---|---|----------------------|

Page 11, Q4. How important are the following issues in limiting the amount of timber you harvest from these woodlands?

- | | | |
|---|--|----------------------|
| 1 | Access and Weather Farm crops and Shooting interests | Nov 20, 2012 4:26 PM |
|---|--|----------------------|

Page 13, Q1. Which of these describes your business?

1	Timber engineers	Nov 22, 2012 3:29 PM
2	mobile treksaw that we use to produce hardwood yimber	Nov 22, 2012 2:28 PM
3	Craft woodworker	Nov 22, 2012 11:25 AM
4	Sell dirct to sawmills	Nov 20, 2012 4:31 PM
5	Groundwork merchant	Nov 20, 2012 12:57 AM
6	we use mobile sawmills to produce own sawn timber	Nov 16, 2012 10:55 AM

Page 13, Q4. Do you buy softwood or hardwood?

1	Primarily welsh softwood. Some imported hardwood when necessary	Nov 22, 2012 3:29 PM
2	Sell not buy	Nov 20, 2012 4:31 PM
3	Mainly sweet chestnut, some oak and ash. WRC and larch. Also some firewood thinnings	Nov 16, 2012 6:15 PM
4	Don't buy in use own roundwood	Nov 16, 2012 10:55 AM

Page 13, Q5. How do you envisage this business progressing in the next five years?

1	Proposed increase in sales, but with rising costs expect profitability to remain static	Nov 22, 2012 3:29 PM
2	Lack of investment	Nov 20, 2012 4:31 PM
3	Demand for good quality dry firewood is increasing	Nov 17, 2012 8:21 AM
4	We need trained employees to work up our products. There seems to be a lack of willing labourers in the county. There are a lot of new firewood businesses setting up, and the price of logs doesnt appear to be rising in line with the price of wholesale firewood. I can't see this situation carrying on and lorry loads of firewood will drop back to a depressing price again.	Nov 16, 2012 6:15 PM
5	Can't fell forever, there is a limit to yield to leave asustainable woodland	Nov 16, 2012 10:55 AM

Page 13, Q6. Which of the following best describes how you envisage your timber use going in the next 5 - 10 years?

1	see 5 above	Nov 16, 2012 10:55 AM
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Page 14, Q1. Do you have any other comments you wish to make regarding the Marches Timber Study?

1	some answers not fitting the question	Nov 26, 2012 7:50 AM
2	<p>The supply of timber from the marches is generally quite poor at present. we are unable to source much timber reliably from the region except where we harvest our own limited supplies. However, having said that, I have reservations from an environmental point of view in proposing a drastic increase in the extraction of timber, especially hardwoods, from local forestry, especially that in the hands of private landowners. Whereas the Forestry Commission has generally good management practices, private landowners are not always so responsible in the exploitation of their woodlands. Before any increase in utilisation of this resource is encouraged on economic grounds I would wish to see a balanced approach to regulation put in place. This initiative also comes at a bad time for UK woodland with the very real risk of large scale loss of important specimens through Ash Dieback disease.</p>	Nov 22, 2012 3:29 PM
3	no	Nov 22, 2012 2:28 PM
4	Need to increase timber markets this will encourage the contractors to expand and develop their work capacity	Nov 20, 2012 4:35 PM
5	A very useful exercise	Nov 20, 2012 12:22 PM
6	<p>Red tape is restricting the supply of timber coming onto the market. Management plans take up to 12 months to be approved by just 2 woodland officers working out of the Ludlow office. Without the plan in place other WIG's such as the Woodfuel WIG both "Timber" and "Roads" cannot be applied for. Then even when the plan is in place there is another time delay and red tape before the WIGs can be approved. Can someone tell me why do you need to submit an EWGS 1 for for the planning grant then another to apply for the WIG for the same client. All this red tape is very frustrating for owners who may be put off from applying for the grants and preventing timber from coming onto the market!</p>	Nov 17, 2012 11:42 AM
7	yet another	Nov 16, 2012 12:36 PM
8	no	Nov 16, 2012 11:14 AM
9	hate surveys they are generally misleading	Nov 16, 2012 10:55 AM