

EXPERT GROUP ON TIMBER AND TRADE STATISTICS

**Minutes of the meeting held in Silvan House, 231 Corstorphine Road,
Edinburgh, on Thursday 15 August 2013**

Present: Alan Christison, Roger Coppock, Alan Corson, Neil Cowan, Michael Fairgrieve, Cameron Maxwell, Nick Moore, Richard Palmer, David Sulman, Sheila Ward (acting Secretary), George Webb, Peter Weston (Chair), Tony Willis, Simon Hart (item 7)

Apologies: Jeremy Darot (Secretary), Chris Inglis, David Leslie, Nigel Manley, John Paterson

1. APPROVAL OF PREVIOUS MINUTES (18 April 2013)

The minutes were agreed.

2. MATTERS ARISING

A. Actions completed since the last meeting

Statistics team: Weighted survey response rates are included in paper 1.

Statistics team: units used in JQ return have been clarified in paper 1.

Statistics team/ group: a list of contact names for the industry surveys had been circulated. Some feedback had been received from the group.

Statistics team: additional explanations on "wood fuel" category were included in *UK Wood Production and Trade: 2012 provisional figures*.

Statistics team: Footnote 2 of table 11 was amended in *UK Wood Production and Trade: 2012 provisional figures*.

Revised proposal on timber price indices has been provided (agenda item 7).

B. Actions outstanding

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

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

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

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

Action: Roger Coppock to present a paper on current work by the FC on alternative tree species in the context of climate change and industry needs at a future meeting.

3. STATISTICS (Jeremy Darot/ Sheila Ward)

Sheila Ward introduced a paper on near-final estimates of 2012 timber statistics, prepared by Jeremy Darot, and sought feedback from the group.

Discussion of the draft figures covered the following points:

- Inclusion of weighted response rates in Forestry Statistics 2013 will require adequate explanation of how these have been derived.
- The decrease in roundwood log exports (table 2.27) would be worth checking.
- FSC data on Chain of Custody certificates (particularly for larger mills) should enable the number of mills with “certification status not known” to be reduced (table 2.29).
- The estimates of woodfuel for internal use by sawmills in 2010 and 2011 should be checked.

Action: Statistics team to ensure that final JQ figures are consistent with figures to be used in Forestry Statistics 2013.

Action: Statistics team to include explanatory text on weighted response rates in Forestry Statistics 2013.

Action: Statistics team to check log exports figure for 2012.

Action: Statistics team to check Chain of Custody status against FSC data.

Action: Statistics team to check figures on internal use of woodfuel by sawmills for 2010 and 2011.

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

4. UNECE Timber submissions (Nick Moore/ Sheila Ward/ Jeremy Darot)

Sheila Ward introduced a paper on input to the UK Market Statement 2013, prepared by Nick Moore. The group were invited to discuss the issues raised in the paper and to provide more detailed feedback directly to Nick.

Discussion of the topics listed in Nick’s paper covered the impact of exchange rates and interest rates, the demand for wood by construction, energy, fencing & pallet markets and the impact of pests and diseases.

Action: group to provide detailed input to Nick Moore by 28 August.

The group provided estimates for 2013 and projections for 2014 for inclusion in the Timber Forecast Questionnaire for UNECE.

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

Sheila Ward updated the group on the timber utilisation work being undertaken by Nick Moore, noting that 2012 estimates have been updated with firm estimates.

Action: Sheila Ward to circulate a copy of Nick Moore's presentation to the group.

5. TREE HEALTH UPDATE (Roger Coppock)

Roger Coppock presented a paper highlighting recent tree health developments. He noted that the pests and diseases pages on the FC website have been recently upgraded to include all current information.

6. NATIONAL FOREST INVENTORY UPDATE (Peter Weston)

Peter Weston introduced a paper prepared by Ben Ditchburn on the proposed 50 year conifer forecasts. Comments are sought by 15 September. Amendments to the proposed scenarios are possible, but Peter noted that adding complexity to the scenarios is likely to threaten the proposed publication date for the work of end 2013.

The group discussed the options and concluded that the proposed approach is sufficient to provide an initial long term view. The group also emphasised the importance of meeting the current timescale for the work.

Action: group to provide additional feedback to Ben Ditchburn by 15 September.

Action: Ben Ditchburn/ Peter Weston to ensure draft reports circulated to EGTTS by 15 November.

Action: Jeremy Darot/ Peter Weston to include QA of draft reports as substantive item on agenda for 21 November meeting.

7. TIMBER PRICE INDICES (John Paterson/ Simon Hart)

Simon Hart presented a paper proposing the development of an index based on clearfell standing sales of Sitka spruce. The group discussed some of the issues that will need to be addressed in taking this work forward.

Cameron Maxwell and Roger Coppock indicated that FCS/ FCGB may be willing to provide some sponsorship for this work.

8. AOB

Roger Coppock noted that the consultation on the Science and Innovation Strategy is currently underway at

https://englandconsult.forestry.gov.uk/corporate-and-forestry-support/sis/consult_view and encouraged the group to submit comments.

Action: group to submit comments on Science and Innovation Strategy by 4 October.

9. DATE OF NEXT MEETING

Thursday 21 November 2013