

EXPERT GROUP ON TIMBER AND TRADE STATISTICS

**Minutes of the meeting held in Silvan House, 231 Corstorphine Road,
Edinburgh, on Thursday 16 April 2015**

Present: Alan Christison, Roger Coppock, Alan Corson, Neil Cowan, Jeremy Darot (Secretary), Michael Fairgrieve, Andrew Heald, Andy Leitch, Nick Moore, David Sulman, David Symons, Sheila Ward, George Webb, Peter Weston (Chair), Ben Ditchburn (agenda item 7)

Apologies: David Leslie, Nigel Manley, Richard Palmer, John Paterson

Peter Weston welcomed members to the meeting, noting that Andy Leitch replaces Cameron Maxwell as the representative from FC Scotland, and David Symons replaces Tony Willis as the representative for the harvesting sector.

1. APPROVAL OF PREVIOUS MINUTES (20 November 2014)

The minutes were agreed.

2. MATTERS ARISING

A. Actions completed since the last meeting

Action: The statistics team checked the availability of data on areas and volumes felled from the FSC and PEFC websites. Some harvesting data is available on the FSC website, however only volumes are reported (not areas), the species are usually not specified, and there are few data points in the time series. The data is therefore unlikely to be helpful for estimating the area of Sitka spruce restocking in Scotland.

Action: The group provided comments on the 2013 user engagement survey draft implementation plan regarding deforestation, which is addressed in agenda item 7.

Action: The statistics team issued draft reports of the quality reviews of the pellet survey and of woodland area, planting and restocking statistics. The reviews are discussed in agenda item 3.

Action: The statistics team issued the distribution lists for other data collections (exporters, shavings, brash removals). The group did not send any amendments to the lists.

Action: The statistics team amended the wording of Q2 on the removals survey to read "Please provide your best estimate of the UK volume (from Q1) harvested under plant health legislation".

Action: The statistics team added a question to the sawmill and fencing surveys on the certified %/ claim system used on all sales of products.

Action: The statistics team amended the wording of Q3 on the pellets survey from "UK grown" to "UK".

Action: The statistics team added 2 questions to the pellets survey to ask about certification (to cover Chain of Custody and input volume certified).

Action: The statistics team and the FC press office drafted a press release on the 2014 surveys, reminding businesses to complete the surveys and asking them to contact the statistics team if not applicable. Stuart Goodall arranged for the information to be included in *Forestry & Timber News*. It also appeared in the Spring issue of *Chartered Forester*.

Action: Sheila Ward circulated the timber utilisation presentation.

Action: Sheila Ward circulated a copy of the John Clegg report to the group. The question of whether an update to the John Clegg report would meet the needs of the group, and whether they would be willing to contribute funds to the project is discussed in agenda item 5.

Action: The group provided comments on the draft report for alternative forecast scenarios to Ben Ditchburn.

Action: Ben Ditchburn included an additional scenario with reduced (80%) restocking assumption.

Action: Sheila Ward circulated an electronic version of the new expense claim form.

B. Actions outstanding

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

Action: FC Scotland 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).

3. STATISTICS (Sheila Ward / Jeremy Darot)

i. 2014 surveys update

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, where the response rate was lower. *UK Wood Production and Trade: 2014 provisional figures* will be published on 14 May 2015.

A list of large non-respondents was circulated prior to the meeting, and some group members had already helped with providing estimates and encouraging more responses.

Action: Group to help with encouraging more responses from non-respondents, and to provide estimates if possible.

ii. Quality assurance of UK Wood Production and Trade first release

Jeremy Darot presented an initial draft of the first release on UK Wood Production and Trade, noting that the version to be released on 14 May would be revised to take account of late returns and corrections following further data checks. He sought comments from the group on the validity of the results.

The group noted that the gap between softwood removals and deliveries had increased, but this may reduce following late returns and further amendments. Furthermore, the group thought the estimate for softwood deliveries to woodfuel may be a little low and recommended further checks.

Panel exports were considered high by the group, given exchange rates. The group also expected to see an increase in sawnwood exports.

Action: Statistics team to undertake further checks, particularly on estimate of softwood deliveries to woodfuel.

iii. Quality assurance of Joint Forest Sector Questionnaire data

Jeremy Darot noted that the draft JFSQ uses the same figures as the draft UK Wood Production and Trade release (with some differences in units reported), and that any comments should be provided to him.

iv. Statistical reviews

The statistics team issued draft reports of the quality reviews of the pellet survey and of woodland area, planting and restocking statistics before the meeting. The actions identified from the reviews include providing additional documentation, improving restocking and deforestation statistics (see actions completed since the last meeting and agenda item 7), and considering publishing additional information from the pellet survey. There were no specific comments from the group.

Action: Statistics team to publish the statistical reviews reports.

Action: Statistics team to investigate the feasibility of publishing additional results from the pellet survey, subject to disclosure constraints, to better meet data users' requirements.

4. TIMBER UTILISATION STATISTICS (Nick Moore)

Nick Moore presented an update on his timber utilisation work, including final 2013 data and updated forecasts for 2014.

Action: Jeremy Darot to circulate the timber utilisation presentation.

5. MARKET AND STATISTICS SUPPORT (Sheila Ward)

Sheila Ward presented a paper outlining the work undertaken under contract to provide market and statistics support to the group and asked members for their views on future requirements. The group expressed its appreciation of the work carried out so far, felt the balance was correct, and strongly supported a continuation of the work in the future.

The group also agreed that the John Clegg report is now outdated and would benefit from an update to make use of results from the National Forest Inventory and other inputs. Funding arrangements for the work need to be considered.

Action: Andrew Heald, George Webb and David Sulman to review and agree with the industry: data needed, outputs needed and funding available.

6. SCIENCE AND INNOVATION STRATEGY UPDATE (Roger Coppock)

Roger Coppock presented a paper outlining the research programme proposals to deliver the FC Science and Innovation Strategy. He noted that 2015/16 is a transition year, as Forest Research move from the previous process to the new arrangements. The current proposals focus primarily on 2015/16 work, pending the outcome of the 2015 Spending Review and its possible impact on future research funding.

7. DEFORESTATION STATISTICS (Ben Ditchburn)

Ben Ditchburn briefly reviewed the key messages from the afforestation and harvesting scenarios report published at the end of March 2015, before presenting the ongoing work of the National Forest Inventory team on woodland loss. A first report (based on remote sensing data only) is scheduled to be published in the summer of 2015. It will cover permanent land use change between 2006 and 2014 and clearfell areas, along with indicative estimates since 1990. Fieldwork based estimates of change will be available from 2017.

An updated availability forecast is planned to be released in December 2015.

Action: Ben Ditchburn to circulate and then present the draft updated forecast report for QA at the November EGTTS meeting.

8. AOB.

None.

9. DATE OF NEXT MEETING (AND REMAINING FOR 2015)

Thursday 13 August 2015

Thursday 19 November 2015