

EXPERT GROUP ON TIMBER AND TRADE STATISTICS

**Minutes of the meeting held in Silvan House, 231 Corstorphine Road,
Edinburgh, on Monday 16 December 2013**

Present: Alan Christison, Roger Coppock, Neil Cowan, Jeremy Darot (Secretary), Ben Ditchburn (agenda item 8), David Leslie, Nigel Manley, Cameron Maxwell, Nick Moore, Richard Palmer, John Paterson, David Sulman, George Webb, Peter Weston (Chair), Sheila Ward, Tony Willis

Apologies: Alan Corson, Michael Fairgrieve, Chris Inglis

1. APPROVAL OF PREVIOUS MINUTES (15 August 2013)

The minutes were agreed.

2. MATTERS ARISING

Peter Weston welcomed Nigel Manley to the group.

A. Actions completed since the last meeting

Action: Sheila Ward will update the group on woodfuel statistics in agenda item 6.

Action: Roger Coppock will present a paper on current work by the FC on alternative tree species in the context of climate change and industry needs in agenda item 7.

Action: Statistics team ensured that final JQ figures were consistent with the figures used in Forestry Statistics 2013.

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

Action: Statistics team checked log exports figure for 2012.

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

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

Action: Statistics team incorporated feedback from the group on UNECE Timber Forecast estimates and projections into return.

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

Action: An update on the NFI 50-year forecast is in agenda item 8. As the generation of forecast outputs has been delayed, Ben Ditchburn will provide an overview of likely removals trends.

Action: The group submitted comments on the Science and Innovation Strategy, which have been taken into account. The SIS is now in its final draft, and is planned to be launched in January.

B. Actions outstanding

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

Action: Statistics team to consider using Wood Recyclers Association data to estimate exports figures, as part of the on-going statistical review of UK imports and exports.

Action: Peter Weston is currently awaiting NRW/WG input regarding the nomination of an EGTTS representative for Wales. Peter to update the group on the nominee at the next meeting.

3. STATISTICS (Jeremy Darot)

i. 2013 user engagement survey

Jeremy Darot presented the initial results of the 2013 user engagement survey. The number and profile of respondents was similar to that of the 2011 survey. The responses and issues raised are also consistent with the feedback obtained in 2011. A report detailing the survey results will be published in the next few weeks.

Action: Tony Willis to contact CONFOR regarding the production of a web-based annual release for the forest industry along the lines of the old Forest Industry Handbooks, and to update the group at the next meeting.

Action: Group to comment on the findings once the report is published, so that follow-up actions can be identified.

ii. Review of fencing survey and UK wood imports & exports

The statistics team are currently undertaking reviews of the fencing survey and of UK wood imports and exports. These are part of a series of reviews, where one survey and one statistical output are reviewed each year to ensure that they are fit for purpose.

Action: Statistics team to send draft reports to the group in the next few weeks, highlighting areas where group feedback is particularly needed.

Action: Group to provide feedback on the draft reports.

Action: Jeremy Darot / Peter Weston to include these statistical reviews as an agenda item at the next meeting.

iii. Approval of questionnaires for 2013 surveys

The distribution lists and questionnaires for the 2013 surveys were reviewed by the group, with a particular emphasis on the fencing questionnaire in the context of the current annual statistical review.

The group made a number of suggestions and approved the questionnaires.

Action: Group to review removals, sawmill, fencing and pellets distributions lists and send any amendments by mid-January.

Removals:

Action: David Leslie to contact a recently formed woodfuel suppliers association in Scotland about new businesses that could be added to the distribution list.

Action: Statistics team to check what statistics are currently available on removals of infected logs under license.

Action: Statistics team to add a question on total infected removals under license to the removals questionnaire.

Other data collections:

Action: Statistics team to send out the current list of roundwood and chip exporters to the group.

Action: Group to review the list of exporters and send any amendments by mid-January.

Action: Statistics team to use data from FC Scotland woodfuel demand and usage survey to improve pellet estimates, if possible.

4. DEFINITION OF “FOREST AVAILABLE FOR WOOD SUPPLY” (Sheila Ward)

Forest Europe collect a range of data from European countries for their pan-European indicators for sustainable forest management every 4 years. The questionnaire provided by Forest Europe includes a request for a range of data on “forests available for wood supply”. Sheila Ward presented several options on how “forests available for wood supply” could be defined in the UK.

The group agreed that the position should be that all UK woodlands are considered available for wood supply, with the qualification that there is a small, unidentified area that is not.

5. TIMBER UTILISATION STATISTICS (Nick Moore)

Nick Moore briefly presented the latest timber utilisation statistics, incorporating data from his Wood Packaging Study 2012 and from the TTF National Softwood Division’s softwood forecast.

6. WOODFUEL STATISTICS (Sheila Ward)

Sheila Ward presented a paper on the data sources currently available on woodfuel. DECC is in the process of gaining access to OFGEM RHI data. The possibility of expanding the work done in Scotland on woodfuel demand and usage by Barrie Hudson to the rest of the UK will be considered once the position on the availability of RHI data is clearer. A further update will be provided at a future EGTTS meeting.

Action: Sheila Ward / Cameron Maxwell to inform the group on progress.

7. PLANT HEALTH UPDATE (Roger Coppock)

Roger Coppock presented a paper on current work by the FC on alternative tree species in the context of climate change and industry needs. There are trade-offs between different timber properties such as strength and density, and between timber properties and pest resistance.

8. NATIONAL FOREST INVENTORY UPDATE (Ben Ditchburn)

The generation of long-term forecast outputs has been delayed. Ben Ditchburn gave an overview of likely softwood availability trends over the next 50 and 100 years, based on partial results. The group suggested that the focus of the upcoming release should be on the 50-year forecast.

Action: Peter Weston/Jeremy Darot to schedule an extraordinary meeting of the group to QA the results once the figures are ready, probably in February or March.

Action: Peter Weston to consider inviting for this meeting additional stakeholders from the Scottish Timber Market Impacts Group and the Private Sector Production Forecast Working Group.

9. REVIEW OF FOREST MENSURATION, MODELLING AND FORECASTING (Peter Weston)

Peter explained that IFOS is currently reviewing some of the fundamentals of its work, such as forest mensuration. The group agreed that there should be an external EGTTS representative on the review group.

Action: David Leslie to be the EGTTS contact point regarding the review.

10. AOB

The proposed dates for meetings in 2014 are **24 April, 14 August and 20 November**, in addition to an extraordinary meeting in February/March.