

# **EXPERT GROUP ON TIMBER AND TRADE STATISTICS**

**Minutes of the meeting held in Silvan House, 231 Corstorphine Road,  
Edinburgh, on Thursday 20 November 2014**

**Present:** Alan Christison, Roger Coppock, Alan Corson, Neil Cowan, Andrew Heald, David Leslie, Nick Moore, David Sulman, Sheila Ward (Acting Secretary), Peter Weston (Chair), Tony Willis, Ben Ditchburn (agenda item 7)

Apologies: Michael Fairgrieve, Nigel Manley, Cameron Maxwell, Richard Palmer, John Paterson, George Webb, Jeremy Darot

Peter Weston welcomed members to the meeting, noting that Hugh Jones, Natural Resources Wales has replaced Kyle Williams as the representative from Wales. A short break would be included in the meeting.

## **1. APPROVAL OF PREVIOUS MINUTES (14 August 2014)**

The minutes were agreed.

## **2. MATTERS ARISING**

### **A. Actions completed since the last meeting**

Action: Andrew Heald reported that work is in progress to review and update the Confor website in 2015.

Action: Peter Weston reported that some progress has been made in the review of FC timber price data, with software changes being implemented. It is expected that improved indices (initially running in parallel with the current versions) will be produced in 2015.

Action: A draft of the user engagement plan is provided in paper 1 (agenda item 3).

Action: The wording of the questionnaires regarding removals under licence will be discussed under agenda item 3.

Action: Sheila ward noted that the apparent discrepancy between wood-based panels inputs and production has been resolved.

Action: The "Other" category was re-named "Private Sector" in the relevant timber tables in Forestry Statistics 2014 and Forestry Facts & Figures 2014.

Action: Text was included to clarify the meaning of the forecasts shown in Tables 2.4a and 2.4b in Forestry Statistics 2014.

Action: The Statistics team have investigated adding a separate size category for mills producing over 100 thousand cubic metres of sawnwood per year. This will be implemented in Forestry Statistics 2015.

Action: The “other” product market category for sawnwood will be discussed under agenda item 3.

Action: Text reflecting current trends in the certification of small private woodland was added to Forestry Statistics 2014, following consultation with the group.

Action: Text to reflect that not all FC removals that are certified was added to Forestry Statistics 2014.

Action: Comments received were incorporated into Forestry Statistics 2014.

Action: Nick Moore reported that the UK market statement had been produced and submitted, taking account of comments received.

Action: Requirements for work on long-term demand forecasts to be discussed under agenda item 5.

Action: Feedback on estimates and projections was incorporated into UNECE Timber Forecast return.

Action: The Timber Price Indices presentations were circulated.

Action: Nursery statistics were highlighted in the commentary accompanying restocking statistics in Forestry Statistics 2014.

Action: The Science and Innovation Strategy will be discussed under item 6.

Action: The Timber Utilisation Update presentation was circulated.

Action: A draft of the latest National Forest Inventory report will be discussed under item 7.

## **B. Actions outstanding**

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

**Action: Statistics team to check availability of data on areas and volumes felled from FSC and PEFC websites.**

**Action: Cameron Maxwell 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)**

Sheila Ward presented a paper covering 3 areas.

### **i. 2013 user engagement survey – implementation plan**

The draft implementation plan provided in paper 1 indicated how the Statistics team were planning to address the recommendations identified in the survey report released in June. Feedback from group members would be welcome.

**Action: Group to provide comments on the draft implementation plan by end December.**

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

The annual quality reviews in 2014 will cover the pellet survey and the release of woodland area statistics. Draft reports on each of these, based on an in-house assessment of compliance with statistical best practice, will be issued shortly, seeking input from the group. The group will then be asked to sign off the final reports at the April 2015 meeting.

**Action: Statistics team to issue draft quality review reports and seek input from the group.**

**Action: Group to provide feedback on the draft reports.**

**Action: Jeremy Darot to include the reviews as an agenda item at the next meeting.**

## **iii. Approval of questionnaires for 2014 surveys**

The group confirmed the continuing need for data collections, considered the distribution lists and reviewed the questionnaires.

**Action: Statistics team to issue current distribution lists for other data collections (exporters, shavings, brash removals).**

**Action: Group to review distributions lists and send any amendments to Jeremy Darot by mid-January.**

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

**Action: Statistics team to add a question to the sawmill and fencing surveys on the certified %/ claim system used on all sales of products.**

**Action: Statistics team to amend wording of Q3 on pellets survey from "UK grown" to "UK".**

**Action: Statistics team to add 2 questions to the pellets survey to ask about certification (to cover Chain of Custody and input volume certified).**

**Action: Statistics team to draft press release on 2014 surveys, reminding businesses to complete the surveys and asking them to contact the Statistics team if not applicable. Andrew Heald to arrange for inclusion of articles in Forestry & Timber News and Timber Trade Journal.**

#### **4. TIMBER UTILISATION STATISTICS (Nick Moore)**

Nick Moore presented an update on his timber utilisation work, noting some amendments to 2013 data and providing forecasts for 2014.

**Action: Sheila Ward to circulate the timber utilisation presentation.**

#### **BREAK**

Peter Weston noted the forthcoming retirement of Tony Willis and thanked Tony for his outstanding contribution to the work of the group (and its predecessor). A photograph of the group was taken to commemorate the occasion.

#### **5. REQUIREMENTS FOR WORK ON LONG-TERM DEMAND FORECASTS (Sheila Ward)**

Sheila Ward introduced paper 2, setting out some existing data sources and inviting comments on the information required, the time period to be covered, next steps and funding options. The group confirmed that there was a definite need for work in this area. The scope of a study was discussed, with the group noting the need for wider economic, European and global issues to be considered.

It was agreed that a refresh of the study by John Clegg Consulting on Wood Fibre Availability and Demand Forecasts, covering a 15-20 year time period, would be a useful starting point. This could make use of the latest NFI-based forecasts and any updates on other information (e.g. on the Renewable Heat Incentive, on processor capacities, etc).

**Action: Sheila Ward/ Jeremy Darot to circulate copy of John Clegg report to the group.**

**Action: Group members to confirm 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.**

#### **6. SCIENCE AND INNOVATION STRATEGY UPDATE (Roger Coppock)**

Roger Coppock gave a brief update on the FC Science and Innovation Strategy, noting that a research brief had now been developed and that programmes were due to start from April 2015.

#### **7. NATIONAL FOREST INVENTORY UPDATE (Ben Ditchburn)**

Ben Ditchburn introduced the draft report "Evaluation of alternative harvesting and afforestation scenarios on British timber availability". The report includes a

range of scenarios aimed at minimising the peak and trough in the 50 year softwood availability forecasts.

There was some discussion on the potential impact of restocking trends. Results from the second cycle of the National Forest Inventory will enable forecasts to be run on current practice. Until then, assumptions of 10% loss on each restock cycle have been assumed.

**Action: Group to provide comments on the draft report to Ben Ditchburn by 11 December.**

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

## **8. AOB.**

Sheila Ward noted that there is a new form to be used when claiming expenses.

**Action: Sheila Ward to circulate electronic version of new expense claim form.**

The proposed dates for meetings in 2015 are:

- 16 April,
- 13 August and
- 19 November.

## **9. DATE OF NEXT MEETING**

The next meeting will take place on Thursday 16 April 2015.